

California – PRISM Compliance Management Update 6/24/2016

The City of San Diego has contracted with PRISM Compliance Management to handle their electronic certified payroll reporting requirements - <https://pro.prismcompliance.com/>

We released our initial PRISM compatibility at the beginning of the year, however, they have totally changed the design and requirements of the Standard PRISM Payroll Import File and we are pleased to announce compatibility with Certified Payroll Solution.

Sunburst DOES NOT have a PRISM account so we cannot test our upload or provide you with instructions on how you are to upload/import the file that CPS creates. You will need to contact PRISM directly for assistance with the upload/import. We did find this information on the web – https://www.sandiego.gov/sites/default/files/legacy/eoc/pdf/ceoc150603_5b.pdf please refer to pages 38 – 41. On page 38 they show a screen shot with a link to a How-To tutorial that you are able to access.

To obtain this update:

Download & install the most current version of CPS on ALL computers that have the program installed.

1. From the CPS Help menu → choose About → Click the BIG “Login” button → select the appropriate download for your version of Windows. Save the download or select Run (depending on the browser you are using).
2. We have a new digital certificate for our software so the first time you run it, you will need to be logged into QuickBooks as the Administrator and in Single User mode to grant the permissions. Choose the last option for permissions “Yes, Always”

Add your Prism User Name:

To add your Prism User Name to CPS, from the System Setup menu → System Preferences → click on the W/C Info+ tab, add your user name to the last field on this screen, where it says Prism User Name.

PRISM Upload format:

Currently, the upload file is required to be submitted in .XLS format (this is an OLD Excel format) – newer versions of Excel (2007 to current) produce .XLXS files. Given this, we have planned ahead and provided you with the option to change the upload format to .XLXS instead of .XLS should they change their minds in the future. You’ll find this setting from the System Setup menu → System Preferences → click on the W/C Info+ tab. **For now, leave this at the default .XLS format.**

Make sure your email address has been entered into CPS:

In CPS, go to the System Setup menu → System Preferences → Addresses tab → Email field

Verify that you have specified an Electronic Upload Folder

From the System Setup menu → System Preferences → click the Data Locations tab → verify that there is a folder selected in the Electronic Upload Folder field. If there isn’t, click the BIG ? at the lower right of the screen to open the in program help and then click the link called Creating an Electronic Certified Payroll Report for instructions. There is a video tutorial on our website for this as well - <http://www.sunburstsoftwaresolutions.com/certified-payroll-solution-how-to-support-videos.htm> look for the video called “How to Create an Electronic Certified Payroll Report File”

Entering PRISM Jurisdiction and selecting the Prism Export file

For each job that requires you to upload your Certified Payroll data to Prism:

1. From the CPS Linked Data menu → choose Jobs → find and edit EACH specific job record.

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2. Add PRISM Jurisdiction to the Additional Information tab – This must be entered as **City_of_San_Diego** (the last we knew – if you have problems with this contact the City of San Diego or PRISM directly)
3. Select the Prism Compliance Management Export Spreadsheet from the Form Options Tab → Electronic Upload Type dropdown menu.

Add PRISM Craft Codes and Craft Levels to CPS

Each PRISM job will have its own unique set of Craft Codes & Levels – WE DO NOT HAVE THIS INFORMATION but you will have access to them and enter add this information to the Work Classifications that you use.

1. From the Basic Info menu → Work Classifications → Edit each Work Classification that you use on your paper reports → click on the Electronic Upload Codes tab (this is NEW) and enter Prism Craft and Craft Levels EXACTLY as they appear on PRISM documentation.

Run your Certified Payroll Reports as usual. You **MUST** either print a copy of the report for your records OR preview the report in order for the file that you will upload to Prism to be created.

When you are done, click Complete.

From the Main CPS menu at the top of the program, choose View → Electronic Uploads. This will automatically open the folder in which the electronic file is saved. All Prism uploads are named as follows:

Prism YYYY-MM-DD Job Name