Payentry

Employee Self Service Guide for the Employer

Activating your employee's portal (for a single employee):

1. Navigate to Employee Information > [Name of Employee] > Miscellaneous tab
2. Add the employee email address in the "E-mail" field provided
3. Select "Save Changes" at the bottom of the web page
4. At the bottom of the page, Select the "add" button
5. In the screen that appears, select "Full" from the drop down
6. Email address will display in the Notification email field
7. Click "OK"
8. Portal Access section will display "AVAILABLE" and a link code is sent to the employee's email address (STEP ONE email). The employee will be invited to create a new account on the **my.payentry.com** website and use the link the code to connect that account to employee and payroll information.

(Note: If you have many employees to activate see the ESS Bulk Activation Process)

Navigating Employee Self Service on Payentry:

On the Miscellaneous tab, there is Portal Access where you can track the employee's signup status and several buttons that appear for you to maintain your employee's accounts:

Portal Access								
ESS Portal	ACTIVE	FULL Access	Lock	Disable	Change Access	Activate	Reset	View Notes
	Account: KKapoor							

Status

AVAILABLE	The employee is ready to be linked to a my.payentry.com account.
REQUESTED	The employee is in the setup process. The employee has a my.payentry.com account and has entered the link code, but has not completed the activation process.
ACTIVE	The employee has successfully connected their my.payentry.com account to his employee information. The employee can now manage and see paycheck information from my.payentry.com.
LOCKED	The employee can't access their employee and paycheck information in the my.payentry.com account. Lock will keep all settings and temporarily keep the employee from accessing the sensitive data.
DISABLED	The employee no longer has a valid link to the employee profile or paycheck information, but can still log into ESS Payentry to view user settings. This removes the connection to

the company and the employee has to be Enabled to link and connect.

Buttons

Lock/Unlock: Toggles between locking an employee's account and unlocking it. The employee can still log into ESS Payentry and his settings are saved, but he will be locked from sensitive company data until unlocked.

Enable/Disable: Enables or disables an employee's account in Payentry ESS. If the account is disabled, red DISABLED text displays instead of the green ACTIVE text displayed. Disabled employees have their links to company data removed. Enable will generate a new link code and send the welcome email to the employee.

Change Access: Changes the employee's access to Payentry ESS. The options are: **Full**—Employee is an active employee and has access to all Payentry ESS features enabled for the company. **Limited**— Employee has been terminated and can only access certain information for the last year they were employed.

Activate: Activates the Payentry ESS portal for the employee. If the box is grayed out (as shown above), users have already activated their account.

Reset: Unlinks the employee from your company. Your employee will be emailed a new link code and will have to enter it in before they can log into his account. **This does NOT reset the password or username. Employees can reset their own passwords on the my.payentry.com site.**

View Notes: Displays any notes that were entered on the Payentry ESS Portal Dialog Box and allows additional notes. These notes are informational only.

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* *Please note that you cannot reset passwords or usernames for your employees. Employees may reset it on my.payentry.com*

Activating multiple employees in Payentry ESS:
1. Navigate to Company Setup> EE Bulk Update Tab
2. Click the EE Portal Access Bulk Update link.
3. Set Filter1 = Portal Status, Value1 = Missing
4. Set Filter2 = Email Address, Value 2 = Present. Employees will need to have their emails set on the Employee> Name of Employee> Miscellaneous Tab, in order to be enabled.
5. Select the employees you wish to enable
6. Select "Update Selected Records" at the bottom of the web page
7. In the screen that appears, select Status "Enable" from the drop down
8. Leave the Access Level as "Full", and Welcome Letter as "Email"
9. Click "OK"
10. Portal Status should display "AVAILABLE" for each employee and link codes are sent to the employees' email address (STEP ONE email). The employees will be invited to create new accounts on the **my.payentry.com** website and use the link the code to connect those accounts.

If you have any questions, please contact your support

team: P| 918.388.3320 E| support@swpay.com