



# Employer Instructions

## My Payentry Employee Self Service

Employers have the ability to manage employee access to their My Payentry accounts on Payentry NextGen. This document shared detailed steps for employers on managing these accounts.

1. Activate My Payentry for an individual
2. Activate My Payentry for multiple people
3. Reviewing enrollment of individuals

### Activating My Payentry for an Individual Employee

1. Navigate to Employee Information > [Name of Employee] > Employee Profile > Employee Self Service
2. Click the **Add Self Service Access** button
3. Verify the employee's email address is accurate and click **Save Changes**

The screenshot displays the 'Employee Self-Service' interface. It is divided into three main sections: 'Current Status', 'Available Actions', and 'Notes'.  
- **Current Status:** Shows 'Self-Service: Self-Service is not set up' and 'Available email addresses: test@test.com (personal) (not set) (work)'.  
- **Available Actions:** Contains the text 'Available actions do not require you to save changes' and a button labeled 'Add Self-Service Access'.  
- **Notes:** A large empty text area for adding notes.  
At the bottom, there is a red warning message: 'ESS users who need to reset their password should use the Forgot your password link on the my.payentry.com login page.' Below this are two buttons: 'Save Changes' and 'Undo Changes'.



## Activating My Payentry for Multiple Employees via Bulk Update

1. From the main dashboard in Payentry, hover over the **Company Setup** menu and select **Employee Self Service Bulk Update**
2. For Filter 1, select **Employee Status** and for Value 1, select **A - Active**
3. For Filter 2, select either **Work Email** or **Personal Email** and for Value 2, select **Present**
4. Using the white check boxes, select the employees would like to enroll (selecting the first white check box next to "ID" will select all listed employees)
5. Click the **Update Selected Records** button at the bottom
6. Find the section that lists "\*missing\*" records and change the dropdown menu from **Skip** to **Add/Enable**
7. Click the **OK** button to enroll employees

Employee Self-Service Bulk Update

Portal:

Filter 1:  Value 1:

Filter 2:  Value 2:

<input type="checkbox"/>	ID	Name	Status	Access	Work Email	Personal Email	Notes	
<input checked="" type="checkbox"/>	4	Beckham, Phoebe	*missing*	*missing*		pbeckham@payentry.com		
<input type="checkbox"/>	10	Husey, Meredith	*missing*	*missing*		mhussey@payentry.com		
<input type="checkbox"/>	12	Allen, Channing	*missing*	*missing*		callen@payentry.com		
<input type="checkbox"/>	16	Green, Jennifer	Active	Full		jgreen@payentry.com		<input type="button" value="Edit Notes"/>
<input type="checkbox"/>	19	Miller, Bradley	Disabled	Limited	bcooper@payentry.com	bcooper@gmail.com		<input type="button" value="Edit Notes"/>
<input type="checkbox"/>	26	Bond, Mandy	*missing*	*missing*		mbond@payentry.com		
<input type="checkbox"/>	27	Wright, Nathan	Available	Full		test@test.com		<input type="button" value="Edit Notes"/>

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## Reviewing My Payentry Enrollment in Employee Self Service

In the Employee Self Service area there are several buttons that appear for you to maintain your employee's accounts:

The screenshot displays the 'Employee Self-Service' interface. It is divided into three main sections: 'Current Status', 'Available Actions', and 'Notes'.  
- **Current Status:** Shows 'Self-Service: AVAILABLE', 'Link Code: GR8KVU', 'Access Level: Full-Full access 1' (with a dropdown arrow), and 'Available email addresses: test@test.com (personal) (not set) (work)'.  
- **Available Actions:** Contains the text 'Available actions do not require you to save changes' and two buttons: 'Lock' and 'Disable'.  
- **Notes:** A large empty text box for entering notes.  
Below these sections, a red note reads: 'ESS users who need to reset their password should use the Forgot your password link on the my.payentry.com login page.' At the bottom are 'Save Changes' and 'Undo Changes' buttons.

**Lock/Unlock:** Toggles between locking an employee's account and unlocking it.

**Enable/Disable:** Enables or disables an employee's account in My Payentry. If the account is disabled, red DISABLED text will be displayed and an **Enable** button will be available to select.

**Access Level:** Allows access level to My Payentry to be updated. The options are: **Full**—Employee has access to all My Payentry features enabled for the company. **Limited**—Employee can only access pay stubs and tax information.

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

Employees have the ability to reset their own passwords on [my.payentry.com](https://my.payentry.com). For security purposes, employers do not have the ability to reset passwords or usernames for individuals.

We are happy to help! Please contact us at 704-269-6140, [service@payentry.com](mailto:service@payentry.com).

