

Creating Self-Reporting Access in EPAY

1. Look up client in EPAY, navigate to Portal Accounts > Manage Accounts
2. Click “Create New”, enter username, first/last name and email address, hit “Create”

Username:

First name:

Last name:

Email:

.....

3. This will create a new line below. Ensure proper boxes are selected (see below for breakdown) and enter password, hit update. Once update button his clicked, password will go away so make note of password first.

Username	Password	First Name	Last Name	Email
<input type="text" value="kdaniels_plumbingwizard"/>	<input type="password" value="plumbingwizard87*"/>	<input type="text" value="Kim"/>	<input type="text" value="Daniels"/>	<input type="text" value="kdaniels@capocpa.com"/>
<input type="checkbox"/> Lock Out	Access Level <input type="text" value="Policy Holder"/>	Permissions		
		<input type="checkbox"/> Upload Bulk Files <input checked="" type="checkbox"/> Manage Employees <input checked="" type="checkbox"/> Audit Reports <input checked="" type="checkbox"/> Payroll Worksheet <input checked="" type="checkbox"/> ACH Account <input type="checkbox"/> Resource		
		Library		
<input type="button" value="Update"/>	<input type="button" value="Email Reset Link"/>	<input type="button" value="Act As"/>		<input type="button" value="Remove"/>

- Manage Employees: Allows for employees to be reclassified.
- Audit Reports: Allows for audit reports to be run.
- Payroll Worksheet: Allows for payroll to be reported.
- ACH Account: Allows for banking info to be updated

4. Send email to individual whose account was setup with the link they will need to access the portal, their username and their password.

https://secure.goecomp.com/report/company_report.html

Username: kdaniels_plumbingwizard

Password: plumbingwizard87*

5. Go back into EPAY, pull up client, make the following adjustments.
- Add new user to "Self Report Email" section.
 - Add new user to "Primary Email" section, separating emails using a comma.
 - Update "Payroll Company" dropdown to show "Self Reporting"

Primary Email:

Register EFT Email:

Classification Email:

Self Report Email:

Override Classification Email to: ☐

Payroll Company:

6. Go back to EPIC, create new SELF activity (F9), ensure activity is coded to Rhonda.

Add Activity			
Category	<input type="text"/>		
Code	<input type="text" value="SELF"/>	confirm payroll reported in EPAY/send email...	Priority <input type="text" value="Urgent"/>
Description	<input type="text" value="confirm payroll reported in EPAY/send email/estimate"/>		
Who/Owner	<input checked="" type="radio"/> Employee <input type="radio"/> Work group	<input type="text" value="MONRH1"/>	Rhonda Montini