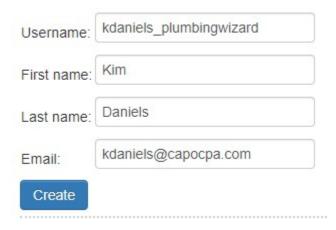
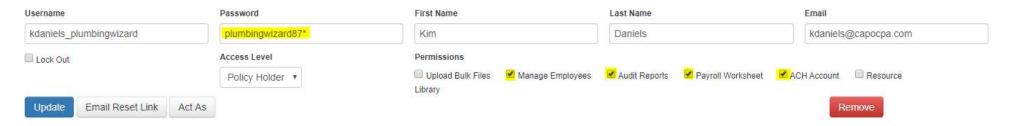
Creating Self-Reporting Access in EPAY

- 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"



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.



- 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.
 - a. Add new user to "Self Report Email" section.
 - b. Add new user to "Primary Email" section, separating emails using a comma.
 - c. Update "Payroll Company" dropdown to show "Self Reporting"



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

