

Payentry ESS Admin User Guide

Welcome to the latest version of Payentry ESS! In this document, you'll learn how to:

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Sentric Payentry ESS Portal

The Payentry Employee Self Service, or Payentry ESS portal, is an employee's one-stop information hub for tax, insurance, pay history, and benefit information. Payentry ESS is a web-based portal, which allows access from a wide variety of devices, including a desktop computer, tablet, or mobile phone. The portal scales to fit any screen resolution.

To ensure that information is secure, the Payentry ESS portal offers two-factor authentication. Administrators can also customize the portal to limit employee access to certain aspects of the system as needed.

Before you can take advantage of the functions offered by the Payentry ESS portal, Payentry ESS must be added to your company by Sentric. Upon activation of the service, you will perform a few configuration steps, grant access to employees, and continue to manage the portal.

Using Payentry ESS as an Administrator

The following topics are for administrators configuring Payentry ESS for their users:

- Employee Self Service Portal Configuration Screen
- Enabling Payentry ESS Access for a Single Employee
- Employee Portal Access Bulk Update Screen
- Payentry ESS Portal Access
- Updating Employees' Portal Access in Bulk

Employee Self Service Portal Configuration Screen

From the Employee Self Service Portal Configuration Screen, you can configure what information displays in your Payentry ESS portal and what features employees have access to on a company-wide level. To access this screen, Navigate to **Main Menu > Additional Options > Setup Section > ESS Portal Configuration**.

Derek Comic Books

Boston, NH

You are here: [Company](#) ▶ [Setup](#) ▶ [ESS Portal Configuration](#)

Logged in as Derek | [Logout](#)

Employee Self Service Portal Configuration		
SETTINGS		
Eligible Employees:		Change
Auto Enable:	MODEL=ONDATE	Change
Auto Reduce Access:	MODEL=NDAYSFROMDATE 10	Change
Auto Disable:	MODEL=NDAYSFROMDATE 100	Change
Auto Activate:	1	Change
Default Notification:	EMAIL	Change
Contact Email:	dpietras@mpay.com	Change
Change Dir Dep:	1	Change
DATA		
Show Accruals:	TRUE	Change
Show Contact Info:	TRUE	Change
Show Deduction Info:	TRUE	Change
Show Banking Info:	TRUE	Change
Show Frmg. Ben. Info:	TRUE	Change
Show Rate Info:	TRUE	Change
Show Stat./Pos. Info:	TRUE	Change
Show Manager Info:	TRUE	Change
Show Tax Form Info:	TRUE	Change
Show Tax Info:	TRUE	Change
FEATURES		
Enable payroll Info:	TRUE	Change
Enable employee Info:	TRUE	Change
Enable company Info:	TRUE	Change
Enable benefit Info:	TRUE	Change
Enable Time Mgmt.:	1	Change
MESSAGES		
Welcome Text:	<p>Welcome to the Payentry Employee Self-Service (ESS) Portal! This portal is your one-stop information hub for your tax, insurance, pay history, and benefit information. You can view all of this through either a desktop computer, a tablet, or your mobile phone.</p>	Change
Contact Text:	<p>For general information regarding setting up and Employee self-service account using of the Payentry ESS Portal, click http://webhelp.mpay.com/#Payentry_ESS/Login/First_Time_Login.htm. For information specific to your configuration of Payentry ESS, contact your Human Resources department at [PROPERTY.CONTACTEMAIL].</p>	Change
NOTIFICATIONS		
Notify Cntc. Change:	Nightly	Change
Notify DirDep Change:	Nightly	Change
Notify Addr. Change:	Nightly	Change
Notifications Enable:	TRUE	Change

For any field that you wish to change the behavior of, click the **Change** button to the right of the field. This displays a dialog where you can adjust the behavior to suit your needs. The Employee Self Service Portal Configuration screen is divided into 5 categories – Settings, Data, Features, Messages, and Notifications.

Settings Category

The Settings Category contains various settings that determine how certain aspects of Payentry ESS behave, such as employee eligibility and the automatic enabling of employees. You can customize them to suit the needs of your company.

SETTINGS		
<i>Eligible Employees:</i>		<input type="button" value="Change"/>
Auto Enable:	MODEL=ONDATE	<input type="button" value="Change"/>
Auto Reduce Access:	MODEL=NDAYSFROMDATE 10	<input type="button" value="Change"/>
Auto Disable:	MODEL=NDAYSFROMDATE 100	<input type="button" value="Change"/>
Auto Activate:	1	<input type="button" value="Change"/>
<i>Default Notification:</i>	<i>EMAIL</i>	<input type="button" value="Change"/>
Contact Email:	dpietras@mpay.com	<input type="button" value="Change"/>
Change Dir Dep:	1	<input type="button" value="Change"/>

Field	Description
Eligible Employees	Specifies which employees are eligible for Payentry ESS portal access. You can specify all employees, or select a previously configured payroll group. For more information, see Payroll Groups Tab .
Auto Enable	<p>Specifies whether the Payentry system automatically enables employee access to Payentry ESS and any associated behaviors. The Payentry ESS job must be scheduled to run daily or nightly for this behavior to occur, otherwise no action is taken. By default, the system does not automatically enable employees, but you can specify a behavior from the drop-down menu:</p> <ul style="list-style-type: none"> • Never • Immediately on the Hire Date • <i>N</i> Days from the Hire Date • On the first of <i>N</i> months after the Hire Date • On the first of the month after <i>N</i> full months from the Hire Date <p>When you select an option with an <i>N</i> value, an additional field displays. Use this field to specify the value of <i>N</i>.</p>
Auto Reduce Access	<p>Specifies whether the Payentry system automatically reduces an employee's access level to Payentry ESS upon termination. The Payentry ESS job must be scheduled to run daily or nightly for this behavior to occur, otherwise no action is taken. By default, the system does not automatically reduce access, but you can specify a behavior from the drop-down menu:</p> <ul style="list-style-type: none"> • Never • Immediately on the Termination Date

Field	Description
	<ul style="list-style-type: none"> • <i>N</i> Days from the Termination Date • On the first of <i>N</i> months after the Termination Date • On the first of the month after <i>N</i> full months from the Termination Date <p>When you select an option with an <i>N</i> value, an additional field displays. Use this field to specify the value of <i>N</i>.</p>
Auto Disable	<p>Specifies whether the Payentry system automatically disables an employee's access level to Payentry ESS upon termination. The Payentry ESS job must be scheduled to run daily or nightly for this behavior to occur, otherwise no action is taken. By default, the system does not automatically disable access, but you can specify a behavior from the drop-down menu:</p> <ul style="list-style-type: none"> • Never • Immediately on the Termination Date • <i>N</i> Days from the Termination Date • On the first of <i>N</i> months after the Termination Date • On the first of the month after <i>N</i> full months from the Termination Date <p>When you select an option with an <i>N</i> value, an additional field displays. Use this field to specify the value of <i>N</i>.</p>
Auto Activate	<p>Specifies whether Payentry automatically sends an employee an activation code when the employee creates their Payentry ESS account. By default, this is active.</p> <p>If this is not set, then the employees will not receive activation codes automatically when they create their Payentry ESS accounts. an administrator will need to manually activate each individual employee.</p>
Default Notification	<p>Specifies what the default method in which notifications are sent from Payentry ESS to employees.</p>
Contact Email	<p>Specifies the default email address used as the point of contact for Payentry ESS.</p>
Change Dir Dep	<p>Specifies whether employees have the ability to change, add, or delete direct deposit information in Payentry ESS.</p>

Data Category

The Data Category allows you to determine what employee information displays in your Payentry ESS portal.

DATA		
Show Accruals:	TRUE	Change
Show Contact Info:	TRUE	Change
Show Deduction Info:	TRUE	Change
Show Banking Info:	TRUE	Change
Show Frng. Ben. Info:	TRUE	Change
Show Rate Info:	TRUE	Change
Show Stat./Pos. Info:	TRUE	Change
Show Manager Info:	TRUE	Change
Show Tax Form Info:	TRUE	Change
Show Tax Info:	TRUE	Change

Field	Description
Show Accruals:	Specifies whether employee accrual information displays in Payentry ESS.
Show Contact Info:	Specifies whether employee contact information displays in Payentry ESS.
Show Deduction Info:	Specifies whether employee deduction information displays in Payentry ESS.
Show Banking Info:	Specifies whether employee banking information displays in Payentry ESS.
Show Frng. Ben. Info:	Specifies whether employee fringe benefit information displays in Payentry ESS.
Show Rate Info:	Specifies whether employee rate information displays in Payentry ESS.
Show Stat./Pos. Info:	Specifies whether employee status and position information displays in Payentry ESS.
Show Manager Info:	Specifies whether information regarding the employee's manager displays in Payentry ESS.
Show Tax Form Info:	Specifies whether employee tax form information displays in Payentry ESS.
Show Tax Info:	Specifies whether employee tax information displays in Payentry ESS.

Features Category

The Features Category allows you to specify which tabs display in Payentry ESS for the employee to use.

FEATURES		
Enable payroll Info:	TRUE	Change
Enable employee Info:	TRUE	Change
Enable company Info:	TRUE	Change
Enable benefit Info:	TRUE	Change
Enable Time Mgmt.:	1	Change

Field	Description
Enable payroll info:	Specifies whether the Pay History tab displays in Payentry ESS.

Field	Description
Enable employee info:	Specifies whether the Employee tab displays in Payentry ESS.
Enable company info:	Specifies whether the Company Info tab displays in Payentry ESS.
Enable benefit info:	Specifies whether the Benefit tab displays in Payentry ESS.

Messages Category

The Messages Category section allows to customize certain messages that are sent from Payentry ESS to your employees.

MESSAGES		
Welcome Text:	<p>Welcome to the Payentry Employee Self-Service (ESS) Portal! This portal is your one-stop information hub for your tax, insurance, pay history, and benefit information. You can view all of this through either a desktop computer, a tablet, or your mobile phone.</p>	Change
Contact Text:	<p>For general information regarding setting up and Employee self-service account using of the Payentry ESS Portal, click http://webhelp.mpay.com/#Payentry_ESS/Login/First_Time_Login.htm. For information specific to your configuration of Payentry ESS, contact your Human Resources department at [PROPERTY.CONTACTEMAIL].</p>	Change

Field	Description
Welcome Text:	<p>Text that displays in certain emails sent from Payentry ESS to the user. This text can be used to give users a brief idea of what Payentry ESS is, for example.</p> <p>Tokens, such as COMPANY, DATE, and EMPLOYEE can be used as well. These tokens are placeholders that will automatically be replaced with new text from Payentry ESS when the email is generated. For example, a token of [EMPLOYEE.FIRSTNAME] will be replaced when the email is generated by the first name of the employee who is receiving the message.</p>
Contact Text:	<p>Text that displays in certain emails sent from Payentry ESS to the user. This text can be used to give users the email address of the point of contact for their Payentry ESS portal, for example.</p> <p>Tokens, such as COMPANY, DATE, and EMPLOYEE can be used as well. These tokens are placeholders that will automatically be replaced with new text from Payentry ESS when the email is generated. For example, a token of [EMPLOYEE.FIRSTNAME] will be replaced when the email is generated by the first name of the employee who is receiving the message.</p>

Notifications Category

The Notifications Category lists the kind of notifications that Payentry ESS sends to administrators. You can change when these notifications are sent.

NOTIFICATIONS		
Notify Cntc. Change:	Nightly	Change
Notify DirDep Change:	Nightly	Change
Notify Addr. Change:	Nightly	Change
Notifications Enable:	TRUE	Change

Field	Description
Notify Cntc. Change:	Specifies when Payentry ESS sends a notification that the employee changed their contact information.
Notify DirDep Change	Specifies when Payentry ESS sends a notification that the employee changed their direct deposit information.
Notify Addr. Change:	Specifies when Payentry ESS sends a notification that the employee changed their address information.
Notifications Enable	Specified whether the company contact will receive notifications summarizing the changes from the Payentry ESS job.

Enabling Payentry ESS Access for a Single Employee

While your employees may have previously created a Payentry ESS account, they will not have access to your company until you enable them in Payentry. You can do this for both a single employee and in bulk. The instructions for Employee Portal Access Bulk Update Screen are provided next in this document. To enable for a single employee, follow these instructions.

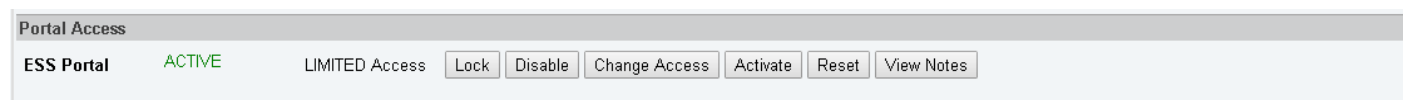
1. Navigate to **Main Menu > Employee Information > [Name of Employee] > Miscellaneous**.
2. Under Portal Access, click **Add**. Detailed instruction on how to use this screen are in the section of this document called 'Payentry ESS Portal Access'.
3. In the screen that appears, enter the Access Level and the Notification method for the employee you are adding.
4. Click **OK**. If you selected email notification, the employee will receive an email at the specified address containing the link code they need to log into Payentry ESS and directions to log in for the first time, if they have not done so. You can repeat this process as needed for individual employees or you can update in bulk.

Payentry ESS Portal Access

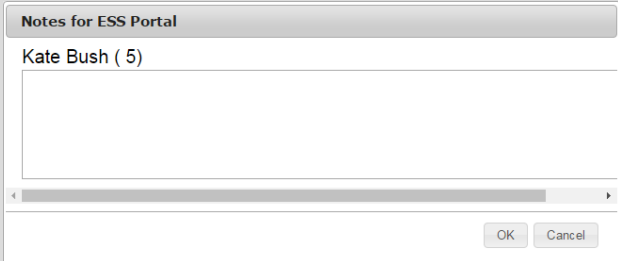
The Portal Access section allows you to specify any additional portals the employee may have access to outside of the standard Payentry application. This section displays only if the employee has the option to access an additional portal, otherwise, this section does not display on the Employee Miscellaneous Tab.

If the company has access to a particular portal, the portal displays in this section. However, a company can limit access to the portal for only a group of employees if they wish. If the portal has an associated service, the company itself can specify the employees who have access when configuring the service. This is done through Payroll Groups. For more information on this topic, contact Sentric.

The Payentry ESS Portal Access section allows you to determine the level of access the employee has to Payentry ESS portal. You can, for example, limit the access the employee has, or even disable their access to Payentry ESS altogether.

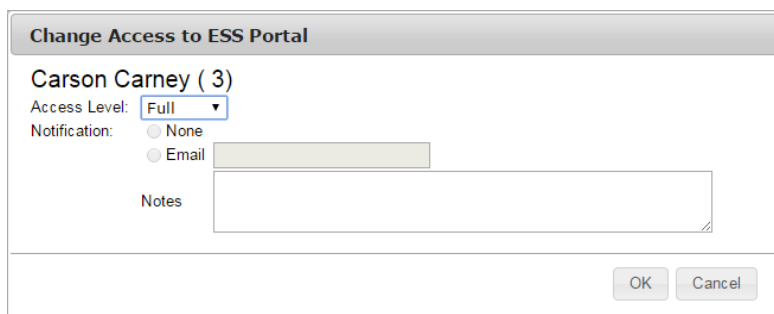


In the figure above, the employee has limited access to their company's Payentry ESS portal. You can adjust the access accordingly.

Button	Description
Lock/Unlock	Toggles between locking an employee's account and unlocking it. Locking an employee's account keeps any configured data for later use, but prevents the user from logging into Payentry ESS and prevents any further updates and configuration until the employee's account is unlocked. The account can be locked regardless of the state it is in.
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 in the figure above. Clicking this button displays the Payentry ESS Portal Dialog Box where the employee's access can be configured. The Payentry ESS Portal Dialog Box is explained below this chart.
Change Access	<p>Changes the employee's access to Payentry ESS. The options are:</p> <ul style="list-style-type: none"> • 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. <p>Clicking this button displays the Payentry ESS Portal Dialog Box where the employee's access can be configured. The Payentry ESS Portal Dialog Box is explained below this chart.</p>
Activate	Activates the Payentry ESS portal for the employee. Users can only be activated after they have inputted their link code (a value sent when enabling the account). Clicking this button displays the Payentry ESS Portal Dialog Box where the employee's access can be configured. The Payentry ESS Portal Dialog Box is explained below this chart.
Reset	Resets the employee's account and access to the Payentry ESS and allows you to reconfigure it. Clicking this button displays the Payentry ESS Portal Dialog Box where the employee's access can be configured. The Payentry ESS Portal Dialog Box is explained below this chart.
View Notes	<p>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.</p> 

Payentry ESS Portal Dialog Box

Several fields in the Payentry ESS Portal Access section display a Portal Dialog box that, when selected, allows you to specify the details of the employee's Payentry ESS configuration.



Depending on the button you clicked in the Portal Access window, the options available in the dialog box will vary. They may be grayed out, but the displayed fields do not vary.

Field	Description
Access Level	<p>Specifies level of access the employee has to Payentry ESS. The options are:</p> <p>Full—Employee is an active employee and has access to all Payentry ESS features enabled for the company.</p> <p>Limited—Employee has been terminated and can only access certain information for the last year they were employed.</p>
Notification	<p>Specifies the methods in which the employee is notified of changes to their Payentry ESS access. The options are:</p> <p>None—No notification.</p> <p>Email—Email notification to the address specified.</p>
Notes	<p>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.</p>

Employee Portal Access Bulk Update Screen

The Employee Portal Access Bulk Update screen allows you to enable access to Payentry Portals, such as Payentry ESS, for multiple employees at a time. This is useful if you are rolling out Payentry ESS and need to enable access for all employees in your company at once. **NOTE:** Employees must have email addresses in the system in order to use this feature. Detailed instruction on portal access are in the section of this document called 'Payentry ESS Portal Access'.

To access the Employee Portal Access Bulk Update screen, navigate to **Main Menu > Company Setup > EE Bulk Update > EE Portal Access Bulk Update**.

Main Menu ▶ EE Bulk Update ▶
Company Setup
Help | Preferences | Logout

Test Company (NH0001)

Employee Portal Access Bulk Update

Portal:

Filter 1: Value 1:

Filter 2: Value 2:

<input type="checkbox"/>	ID	Name	Status	Access	Email	Notes
<input type="checkbox"/>	1	Major, Melanie	Active	Full	dpietras@mpay.com	View Notes
<input type="checkbox"/>	2	Crockett, Jennifer	Available	Full		View Notes
<input type="checkbox"/>	3	Carney, Carson	Active	Full		View Notes
<input type="checkbox"/>	4	Sheppard, Trevor	Available	Full		View Notes
<input type="checkbox"/>	5	Robbins, Madelyn	*missing*	*missing*		
<input type="checkbox"/>	6	Dennis, Nathan	Requested	Full		View Notes
<input type="checkbox"/>	7	Grimm, Justin	*missing*	*missing*		

[◀ Return to EE Bulk Update](#)

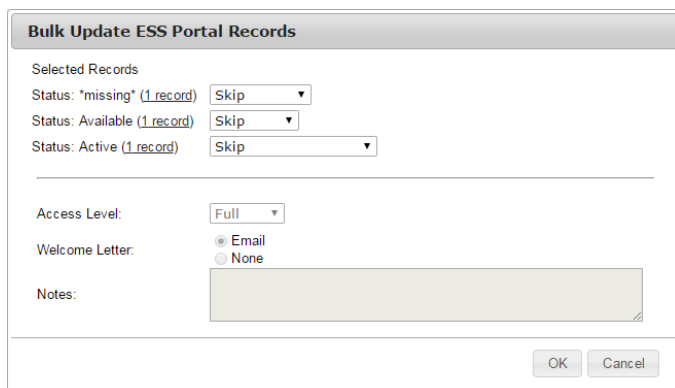
Using the filters at the top of the screen, you can determine which employees display in the table. You can also specify which portal to enable access to.

Field	Description
Portal	Drop-down menu where you specify the portal type to work with.
Filter 1, Filter 2	Terms used to filter the list of employees that display in the table. You can set up to two filters. Some filters display as column headers in the table.
Value 1, Value 2	Terms used to further narrow down the list of employees that display in the table. If, for example, the filter specified was Employee Status, the value would be the specific status, such as Full-Time.
ID	Employee identification number.
Name	Name of employee.
Status	Employee's status in the selected portal. The options vary depending on the portal selected.
Access	Level of access the employee has to the specified portal. This can be used to limit the areas of the portal the employee can use.
Email	Employee email address.
Notes	Button that allows you to enter any notes for the specified employee. Click View Notes to display a dialog box where notes can be entered for the specified employee.
Update Selected Records	Button that updates the employees you specified to the portal you selected in the Portal drop-down menu. For more information, see the section of this document called 'Updating Employees' Portal Access in Bulk'.

Updating Employees' Portal Access in Bulk

You can update your employees' access to the Payentry portals in bulk. To do so:

1. Navigate to **Main Menu > Company Setup > EE Bulk Update > EE Portal Access Bulk Update**.
2. Select the portal to which you wish to enable employee access from the Portal drop-down menu.
3. Enter any filters and values to narrow down the list of displayed employees.
4. Using the checkbox to the left of ID column, select the employees to update.
5. Click **Update Selected Records...** The following screen displays.

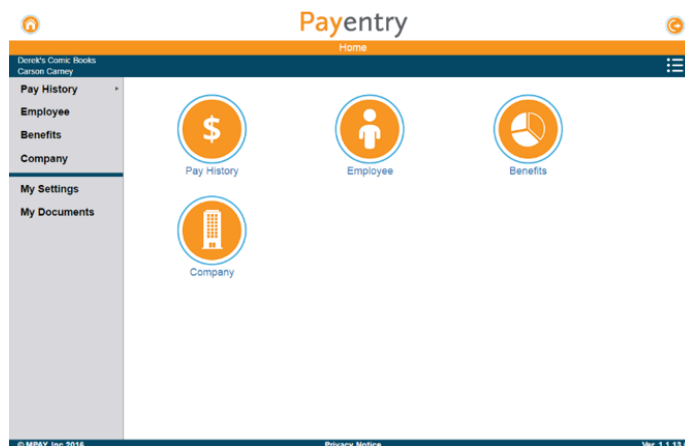


The records that display under Selected Records are the statuses of the employees you selected from the table. Clicking the Record link displays all employees that match that condition.

6. Using the drop-down menus next to the records, specify the action to apply to the employees. All employees under the same status receive the same value.
7. Change access level if necessary.
8. Specify the method in which your employees will receive their welcome message.
9. *Optional.* Enter any notes. These notes display on the employee notes section on the Employee Portal Access Bulk Update Screen.
10. Click **OK**. The employees have all been updated.

Navigate Payentry ESS

After logging into Payentry ESS for the first time, you see the Home screen each time you log into Payentry ESS. The Home screen contains links to the rest of the functionality available in Payentry ESS. The links that display will vary depending on how your employer configured Payentry ESS.

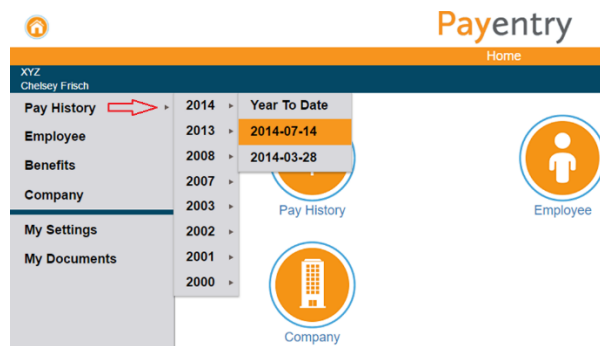


At the top of the screen in the blue bar, your name displays along with the name of your company. Payentry ESS gathers this information from your existing records within the company. Depending on the resolution of the screen you are using, the menu column on the left side of the screen may be hidden. If, for example, you are viewing the Home page on a mobile device, that column does not display. Below is an explanation of options on this screen.

Icon/Menu Item	Description
	Returns you to the Home screen from anywhere in Payentry ESS.
	Logs you out of Payentry ESS and returns you to the login screen.
	Opens the My Settings Page where you can change your password, adjust security questions and answers, and switch the company you are currently logged into.
Pay History	Displays your detailed pay history for each check date you have been paid at the company. This includes breakdowns of the funds, deductions and year-to-date (YTD) information. You can also display a scan of the actual pay check.
Employee	Displays employee information, such as your home address, phone number, and email address. In addition, your accrued time off, length of service, and tax information displays here.
Benefits	Displays your benefit information, including any fringe benefits.
Company	Displays information about the company, including the address and contact information. Also, displays a searchable company directory to view employees.
My Settings	Opens the My Settings Page where the employee can change their password, adjust their security questions and answers, and switch the company they are currently logged into.
My Documents	Displays any tax forms the employee has available for view. The tax forms only display if the employee is enrolled in online tax forms.

Use the Pay History Screen

The Pay History screen in Payentry ESS displays your pay information. This information is organized by check date, and includes all check dates you've been paid at the company. From the Main Menu, select **Pay History** or use the sidebar menu. The sidebar expands when you hover over it, allowing you to choose from pay history records.



Once in the Pay History screen, you will see a list of check dates you have been paid for the company.

Check Date	Period End	Net Amount	View Check
7/14/2014	7/14/2014	\$165.22	
3/28/2014	3/22/2014	\$502.34	
7/5/2013	6/29/2013	\$1,701.60	

Below is an explanation of values in this list.

Field	Description
Check Date	Date on which the paycheck was issued to the employee.
Period End	Date on which the pay period closed for the specified check.
Net Amount	Total amount of money netted for the check date.
View Check	Button that displays a printable PDF version of the specified paycheck.

Click one of the check dates in the list at the top of the screen to display several sections of information. The sections displayed vary depending on what information is relevant to you.

Check Date	Period End	Net Amount	View Check
7/14/2014	7/14/2014	\$165.22	
3/28/2014	3/22/2014	\$502.34	
7/5/2013	6/29/2013	\$1,701.60	

7/14/2014		1350
Chelsey Frisch		\$165.22

Earnings		
Earning	Hours	Amount
Regular	5.00	\$125.00
PU Auto	0.00	\$32.00
Regular	20.00	\$500.00
PU Auto	0.00	\$128.00
Total	25.00	\$785.00

Employee Taxes		
Tax	Wages	Amount
Medicare	\$740.00	\$10.73
OASDI	\$740.00	\$45.88
CA SDI - Employee	\$740.00	\$5.92
Federal Income Tax	\$740.00	\$0.00
Arizona SITW	\$740.00	\$0.00
California SITW	\$740.00	\$74.00
Total		\$136.53

Deductions		
Deduction	Amount	
Fringe	\$32.00	
Fringe	\$128.00	
Health Ins	\$45.00	
CCLUB	\$10.00	
Fringe	\$22.00	
GARN	\$100.25	
OH Support	\$50.00	
Total	\$483.25	

Direct Deposits		
Bank	Account	Amount
PNC Bank	***909	\$165.22
Total		\$165.22

Employer Taxes		
Tax	Wages	Amount
Medicare - Employer	\$740.00	\$740.00
OASDI - Employer	\$740.00	\$740.00
CA Edu & Training	\$740.00	\$740.00
California SUI	\$740.00	\$740.00
Fed Unemployment	\$740.00	\$740.00

Below is an explanation of each section.

Field	Description
Earnings	Displays the amount of money you earned for each pay type in the pay period. For example, you could have 40 hours of regular pay and 8 hours of overtime pay.
Employee Taxes	Displays any taxes and the amount of money withheld from your net pay.
Deductions	Displays any funds deducted from your net pay.
Employer Taxes	Displays any employer taxes and associated wages.
Benefits	Lists any benefits and the amount of money for each earned by the employee. This section is not represented in the screenshot above.
Direct Deposits	Lists the bank names and last four digits of any account numbers associated with your direct deposits.

Use the Employee Screen

The Employee Screen in Payentry ESS displays employee information, such as your phone number, address, deductions and taxes. From the Main Menu, select **Employee** or use the sidebar menu.

The screenshot shows the Payentry Employee screen for a user named Chelsea Finch. The interface includes a sidebar menu with options like Pay History, Employee, Benefits, Company, My Settings, and My Documents. The main content area is divided into several sections:

- Contact Information:** Home Phone, Cell Phone, Work Email (ch@sentric.com), Home Address (713 Bayridge Street, Pittsburgh, PA 15226), and Work Address (500 Pittsburgh Ave, Pittsburgh, PA 15227).
- Status / Position:** Active, HR Manager, Hire Date (8/19/1992), Pay Rate (190.00), Division (HR (801)), Branch (Pittsburgh (01)), and Department (Administration (100)).
- Accruals:** A table showing accrued PTO Managers and Sick time.
- Direct Deposits:** A table showing a direct deposit to PNC Bank.
- Deductions:** A table listing deductions like 401k Loan, Health Ins, and OH Support.
- Taxes:** A table listing taxes such as Federal Income Tax, Medicare, OASDI, and Pennsylvania SITW.
- Fringe:** A table showing fringe benefits like Personal Use Auto.
- Online Tax Form Enrollment:** A link to go to the online tax form enrollment page.

Below is an explanation of each section.

Field	Description
Contact Information	Lists your contact information, such as home and cell phone number, home address, and work address. Some of these fields can be edited by clicking on the Pencil icon.
Status/Position	Displays information about your status in the company, including your hire date and pay rate.
Accruals	Displays your accrual information, such as vacation or sick time.
Direct Deposits	Lists any direct deposit accounts configured for you.
Deductions	Lists any deductions and their amounts. This money is deducted from your net pay and subsequently displayed on the Pay History Screen.
Taxes	Lists any taxes that are applied to you.
Fringe	Displays any fringe benefits you earn. More benefit information can be seen on the Benefits Screen.
Online Tax Form Enrollment	Allows you to enroll to receive your online tax forms. For more information, see Enroll in Online Tax Forms.

Manage Direct Deposit Details

If your company is configured to do so, you can add, edit, or delete your direct deposit information through Payentry ESS. The information below explains how to access the Direct Deposit section and its contents. Below that is instruction on how to add, edit, delete, and change the order of your direct deposit accounts.

Navigate to **Main Menu > Employee** and locate the Direct Deposits section, which is shown below.

Direct Deposits					
Order	Bank	Account	Amount	Edit	Delete
1	Boston Bank of Commerce	**5421	10.00%		
2	Payentry Debit Card		\$1,000.00		
3	State Street Bank & Trust	**1118	All but \$50.00		
4	Scotlabank	**1739	\$120.00		

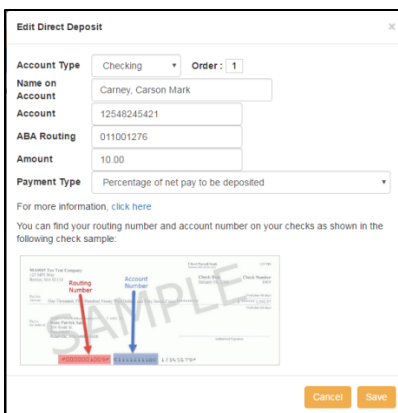
[Add Direct Deposit](#)
[Change Order](#)

The table below describes the fields displayed above:

Field	Description
Order	Priority in which the direct deposits are deposited for the specified account. The highest priority direct deposit (lowest numbered) is filled first, followed by the next, and so on. If your available funds (net pay) cannot fill all accounts, the lower priority accounts (highest numbered) are not filled. Similarly, if all funds are filled with additional funds left over, you will receive a paper check for the additional funds.
Bank	Name of the bank in which your funds are deposited.
Account	Number used to identify your deposit account.
Amount	Amount of money to be deposited into the employee's account. This value can be a dollar amount or a percentage.
Edit	Button that allows you to edit direct deposit information, including routing and account numbers. For more information, see the section named Adding a New or Editing an Existing Direct Deposit.
Delete	Button that deletes the specified account from the list of available accounts. For more information, see the section named Deleting a Direct Deposit.
Add Direct Deposit	Button that allows you to add a new direct deposit account. For more information, see the section named Adding a New or Editing an Existing Direct Deposit.
Change Order	Action that allows you to reorder the accounts to determine which accounts are filled first. For more information, see the section named Change Order of Direct Deposits.

Add a New or Edit an Existing Direct Deposit

When you add a new direct deposit account or edit an existing account, you will see a screen similar to the image below. Upon choosing to perform either task, you will first be prompted to enter your two-factor authentication code to validate your identity and continue. You will be able to configure aspects of the direct deposit account, including the type of account and the amount of money to deposit.




Below is an explanation of each field.

Field	Description
Account Type	Drop-down menu that indicates whether the account is a checking or a savings account.
Order	Priority in which your direct deposit accounts are filled. The lower the number, the higher the priority. For example, an account with “1” in this field will receive funds first, an account with “2” in this field will receive funds second, and so on. Only when accounts with higher priorities are filled are accounts with lower priority filled.
Name on Account	Name that appears on the bank's records for the specified account.
Account	Account number used to identify the account. This number can be found on a check issued for the account.
ABA Routing Number	ABA routing number used to identify the bank. This number can be found on a check issued for the account.
Amount	Amount of money that you will deposit into the specified account. This value can be a percentage or a flat amount, depending on what is specified in the Payment Type field. If you want to deposit all net pay into the account, this field should contain “100” and the Payment Type will be “Percentage of net pay to be deposited”.
Payment Type	Method in which payments are calculated. There are four options: <ul style="list-style-type: none"> • Flat Dollar Amount (or remainder of net pay if it is less than the amount) – The amount specified is the amount of money that will be deposited into the account. Any additional funds are deposited into the next account by priority, or issued as a paper check. If, for example, you specify an amount of \$100, and your net pay is \$150, then only \$100 is deposited into the account. Using the same configuration, if you were paid \$75, then all \$75 would be deposited into the specified account. • Flat Dollar Amount (or 0 if remainder of net pay is less than the amount) – The amount specified is the amount of funds that will be deposited into the account. However, if the funds to deposit are less than the amount, then nothing will be deposited. For example, if you specify an amount of \$100 and earn \$150, then \$100 is deposited. If you are paid \$75, then no money would be deposited into the account. • Percentage of net pay to be deposited – The amount entered is a percentage of your net pay that will be deposited into the account. For example, if you have an amount of 10, then 10% of your net pay will deposit into the account. If you are paid \$150, then \$15 would be deposited into the account. Note: If you want to deposit all net pay into an account, the amount should be “100” and this option should be selected for the payment type. If you have more than one account and want the lowest priority (highest number) account to be funded with the remainder of your net pay, this is also the appropriate configuration. • All Except a Specific Amount – All remaining net pay will be deposited except for the amount specified. For example, if you specify an amount of \$10 and earn \$150, then \$140 would be deposited into the account.

Deleting a Direct Deposit

Deleting a direct deposit account consists of a few steps and cannot be undone, so be cautious when taking this action. To delete a direct deposit, follow the steps below.

1. Navigate to **Main Menu > Employee** and locate the Direct Deposits section.
2. Click the **Delete** button  next to the account you wish to delete. The screen below displays.

Delete Direct Deposit ✕

You've selected the following direct deposit to delete:

Order	Transit/Bank	Account #	Amount
1	Boston Bank of Commerce	**5421	10.00%

Deleting the displayed direct deposit will:

1. Distribute the amount allocated to this deposit across the remaining direct deposits.
For any amount remaining, a paper check will be issued.
2. Shift the order of processing for the remaining direct deposits.

Are you sure you want to delete this direct deposit?

Cancel
Continue

1. Click **Continue** to proceed or click **Cancel** to cancel the change.
2. Enter your two-factor authentication code to validate your identity.
3. Click **Continue**. The direct deposit account has been deleted.

Change Order of Direct Deposits

You can change the processing order of your direct deposit accounts. Accounts with a higher priority (lower number) are filled before accounts with a lower priority (higher number). To do so, perform the following steps.

1. Navigate to **Main Menu > Employee** and locate the Direct Deposits section.
2. Click **Change Order**.
3. Enter your two-factor authentication code to validate your identity.
4. Click **Continue**. The figure below will appear.

Change Direct Deposits Order ✕

Use the orange arrows to change Direct Deposits Order:

Transit/Bank	Account #	Amount	Order
Payentry Debit Card		\$1,000.00	▲ ▼
State Street Bank & Trust	**1118	All but \$50.00	▲ ▼
Scotlabank	**1739	\$120.00	▲ ▼

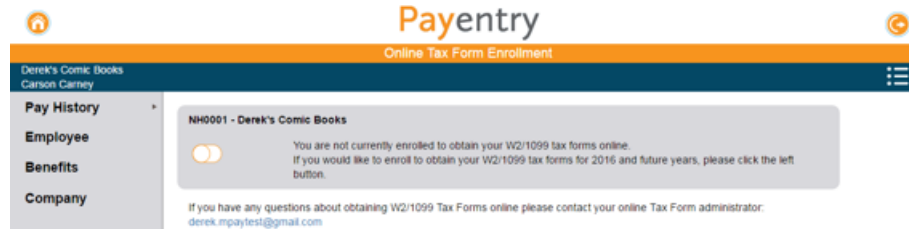
Cancel
Save

5. Use the orange arrows under Order to rearrange the direct deposit accounts. The higher the account displays in the list, the higher priority it will be, meaning it will receive funds prior to the remaining account(s).
6. When you are satisfied with the order, click **Save** or click **Cancel** to cancel the change.

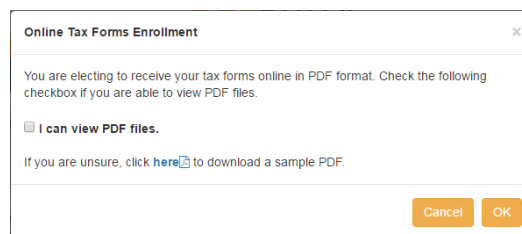
Enroll in Online Tax Forms

If your company is configured to allow you to view your tax forms online, you must elect to do so. This option is only available if your company has enabled it. To enroll in online tax forms, follow the steps below.

1. Navigate to **Main Menu > Employee** and locate the Online Tax Form Enrollment section.
2. Click **Go to Your Online Tax Form Enrollment** in that section, which will display the screen below.



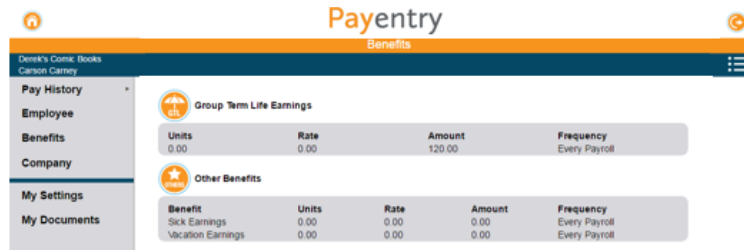
3. Click the orange slider button. The screen below displays.



4. Check the **I can view PDF Files** if you are able to view PDF files. If you are unsure, click the link to download a sample PDF. If you can view it, you can view the online tax form files.
5. Click **OK** to proceed or click **Cancel** to cancel your enrollment. If you click **OK**, the slider icon moves to the right and you are enrolled. You will be able to view your tax forms online in My Documents.

Review the Benefits Screen

The Benefits screen lists any benefits including the units, rate, and amount.

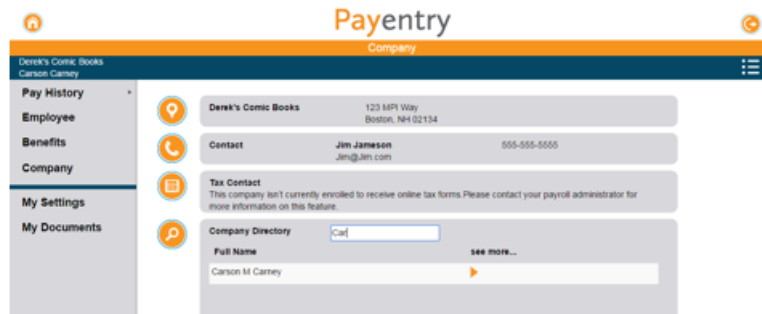


In the image above, the employee has three benefits configured to display on this screen. Some benefits, such as Group Term Life Insurance, have their own icon and are separated from the other group, while some such as Vacation display under the Other Benefits umbrella. Below is an explanation of each field.





Field	Description
Units	Number of units used in the benefit. For example, Units can be hours.
Rate	Amount of money used for each unit. For example, if units are hours, the rate would be the amount of benefit money earned for each hour.
Amount	Total amount of benefit money for the specified benefit. This can be a flat amount or an amount calculated from the rate and units.
Frequency	Frequency in which you earn the benefit.

Review the Company Screen

The Company Screen lists information about your company and includes a company directory look-up.

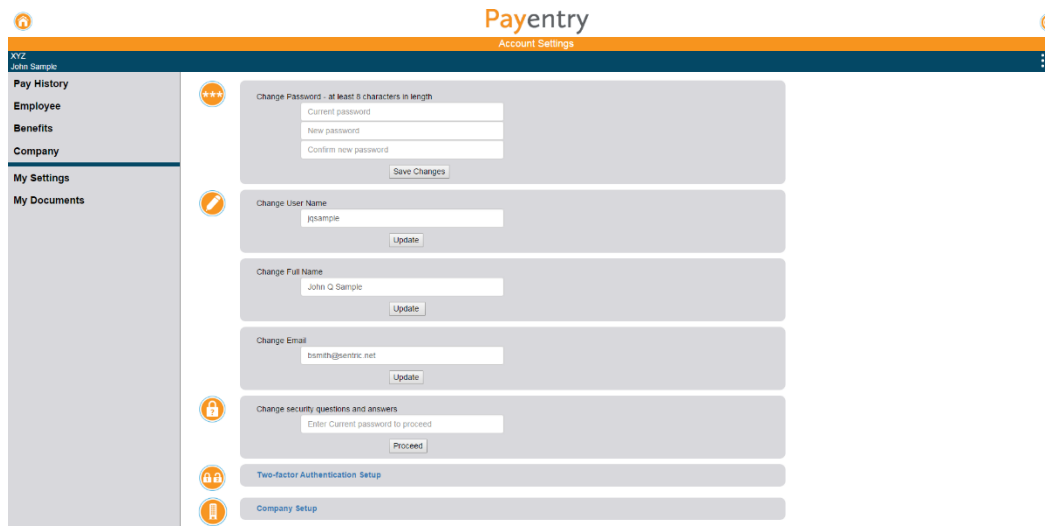


Below is an explanation of each field.

Field	Description
	Displays the name of the company and its address.
	Displays the contact information for the primary contacts in the company. This information includes their email address and telephone number.
	Displays the contact information for the tax contacts in the company. These people are the ones to speak to regarding tax-related inquiries.
	Displays the directory of employees in the company. Entering the employee's name, or part of it, into the search bar displays any matches in the company. For example, in the figure above, the user inputted "Car" and Carson's information was returned. Clicking the orange arrow icon next to the employee's name displays the full information on the employee.

Use the My Settings Screen

The My Settings page allows you to change certain user settings, such as your password and security questions.




Below is an explanation of each field.

Field	Description
Change Password	Changes your password. You must enter the current password before changing to a new one. For more information, see the section named Changing Your Password in Payentry ESS.
Change User Name	Changes your user name.
Change Full Name	Changes your full name. This will not update your payroll processing profile.
Change Email	Changes your email address.
Change Security Questions and Answers	Changes your security questions and their answers. For more information, see the section named Changing Your Security Questions and Answers in Payentry ESS.
Two-Factor Authentication Setup	Links to a page where you can edit your two-factor authentication settings. For more information, see the section named Logging into Payentry ESS for the First Time.
Company Setup	Allows you to add a new company using a link code or switch to another company in which you are enrolled. For more information, see the section named Company Screen.

Change Security Questions and Answers

When you created your account in Payentry ESS, you selected four security questions and inputted answers for each. These questions are used to verify your identity if, for example, you forgot your password. To change the questions and their answers:

1. In **Change security questions and answers**, enter your current password. Click **Proceed**.
2. A screen displays where you can reselect your questions and answers. You must reenter your questions and answers for all four questions, even if you only wish to change one.
3. Click **Save and Continue**. You will be navigated back to the My Settings page, which displays a message indicating that security questions were changed successfully.

Note: You can access this feature from any screen in the Payentry ESS portal by clicking the gear icon in the upper right side of the screen  and choosing My Settings from the menu.


Change Password

You can change your password directly in Payentry ESS. To do so:

1. In **Change Password**, enter your current password in the first box.
2. Enter the new password in the second box.

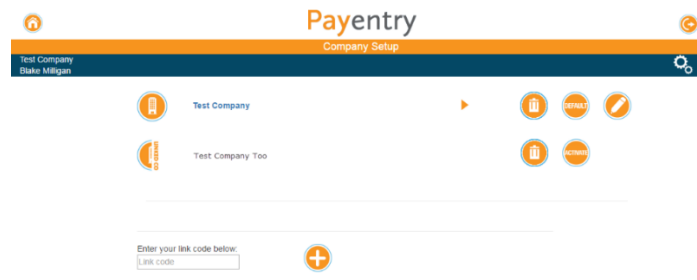
Note: Passwords must be at least 8 characters and contain an uppercase letter, a lowercase letter, a number, and a symbol.

3. Reenter the new password in the third box.
4. Click **Save Changes**. If the passwords entered in the New Password and Confirm New Password boxes match, the password has been changed. You will be navigated back to the My Settings page, which displays a message indicating that your password has been changed.

Note: You can access this feature from any screen in the Payentry ESS portal by clicking the gear icon in the upper right side of the screen  and choosing My Settings from the menu.

Manage Company Setup








The Company Setup Screen allows you to view the companies you are enrolled in, specify one as the default, and activate additional companies as needed.



The upper portion of the Company Setup Screen lists the companies you are able to access. In the figure above, the user is active in Test Company and is waiting to activate Test Company Too. To activate Test Company Too, the user would click **Activate** and enter the activation code they received in their email.

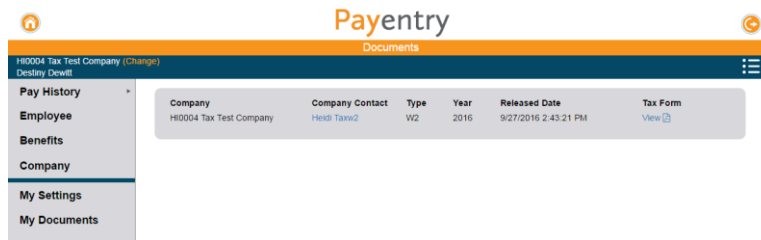
The lower portion of the Company Setup Screen allows you to add a new company to the list of available companies by entering its unique link code below. You would receive link codes via email. Link codes are sent when your employer adds, enables, or resets your account(s).

Below is an explanation of each field.

Field	Description
	Name of the company.
	Name of company that you have yet to activate.
	Selects the company from the list and returns to the home screen, where you can view information.
	Removes your link to the selected company. Note: This action cannot be undone.
	Selects the specified company as your default company. You are automatically logged into your default company.
	Allows you to edit the name of the company. This edit only displays on your login.
	Navigates to a screen where you can activate a company. Only displays on companies that have yet to be activated.

Use the My Documents Screen

If you have chosen to enroll in online tax forms, these forms will display in the My Documents tab.



In the figure above, the employee can view their 2016 W2 form online. Some additional information about the form is also displayed.

Field	Description
Company	Name of the company from which the form was issued. If you are enrolled in multiple companies in Payentry ESS, you will receive a tax form from each company.
Company Contact	Name of person to contact regarding tax form information. Clicking the name displays their contact information.
Type	Type of tax form.
Year	Year for which the tax form was issued.
Released Date	Date in which the tax form was released to you and available for view.
Tax Form	Link that displays a printable PDF file of the tax form.