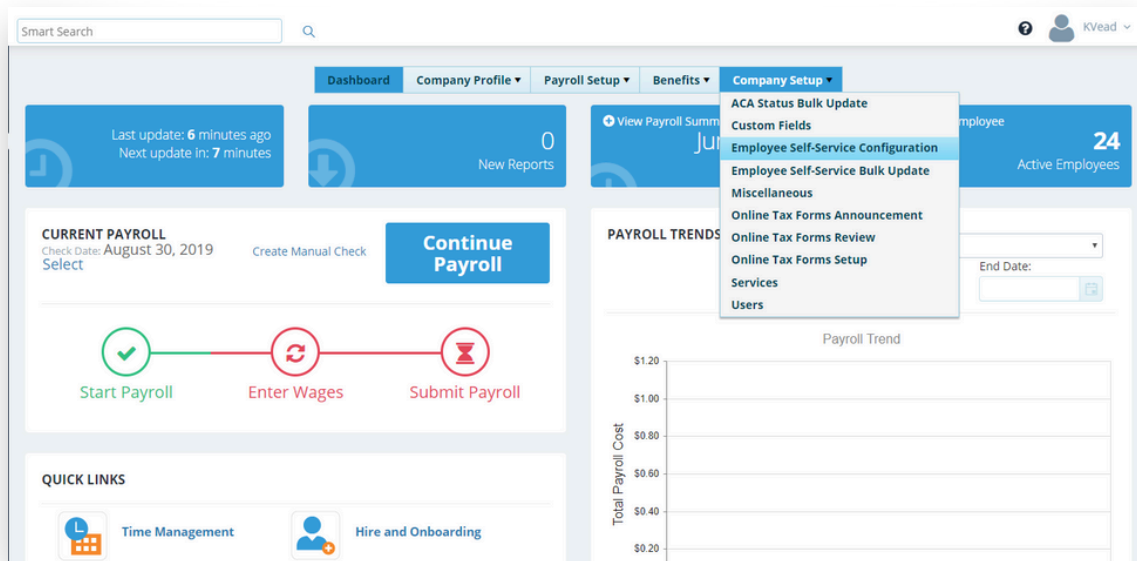


1

From the main dashboard of Payentry, hover over the **“Company Setup”** and select the option for **“Employee Self Service Configuration.”**



2

The **“Data”** section allows you to determine what employee information displays in My Payentry.

The default section is TRUE for all sections, meaning that unless you choose to turn it all off, all of the information in this section is available to be viewed in My Payentry.

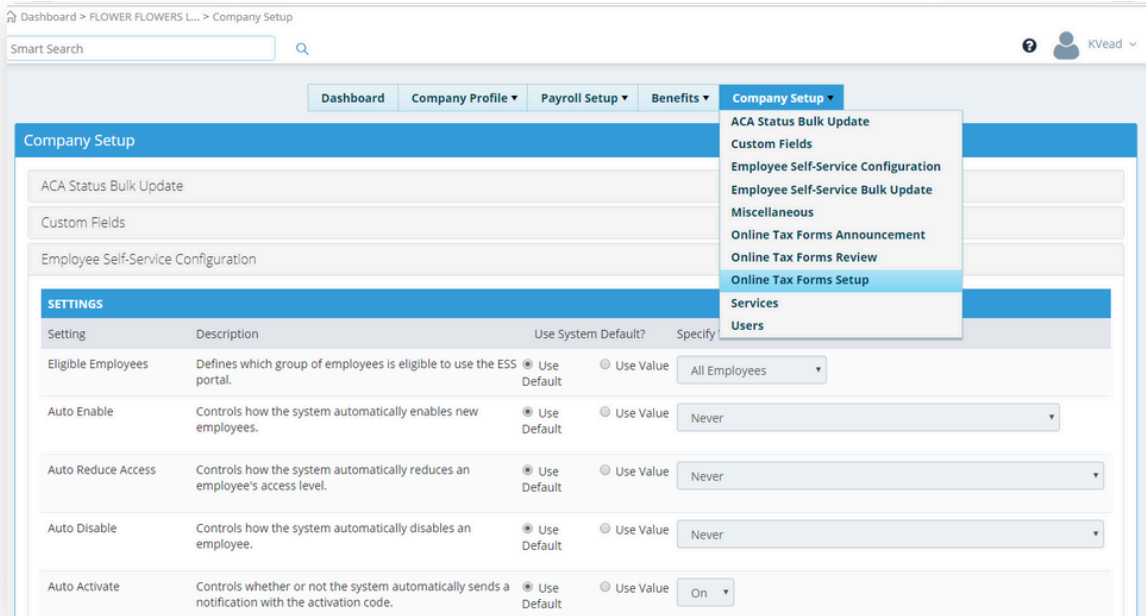
Show Tax Form Info: Specifies whether employee tax form information displays in My Payentry. Once forms have been released, they will display in the **“My Documents”** section of My Payentry.

Setting	Description	Use System Default?	Specify Value
Show Accruals	Display an employee's accrual information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Contact Info	Display an employee's contact information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Deduction Info	Display an employee's deduction information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Banking Info	Display an employee's bank and direct deposit information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Fring. Ben. Info	Display an employee's fringe benefit information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Rate Info	Display an employee's rate information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Stat./Pos. Info	Display an employee's status and position information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Manager Info	Display information about an employee's manager.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Tax Form Info	Display an employee's tax forms.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>
Show Tax Info	Display an employee's tax information.	<input checked="" type="radio"/> Use System Default	<input type="radio"/> Use Value <input type="text" value="On"/>

SETUP ONLINE TAX FORMS

3

After review of the Employee Self Service Configuration, add your company's Year End Form Administrator Information by hovering over **"Company Setup"** and selecting **"Online Tax Form Setup."**

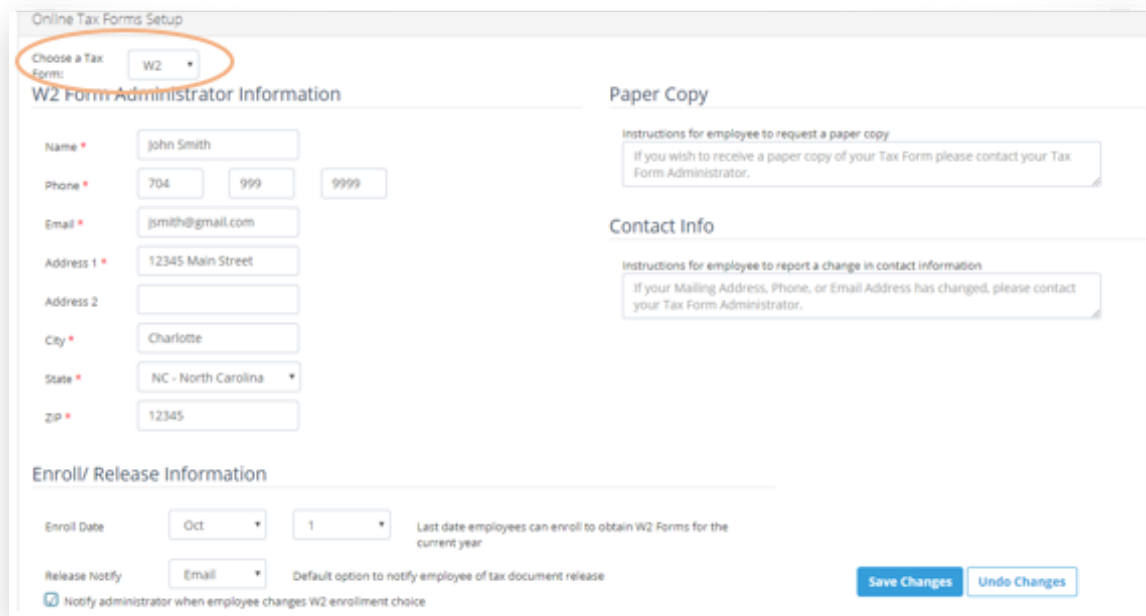


The screenshot shows the 'Company Setup' page in a web application. The 'Company Setup' menu is open, and 'Online Tax Form Setup' is highlighted. Below the menu, there is a table of settings.

Setting	Description	Use System Default?	Specify
Eligible Employees	Defines which group of employees is eligible to use the ESS portal.	<input checked="" type="radio"/> Use Default <input type="radio"/> Use Value	All Employees
Auto Enable	Controls how the system automatically enables new employees.	<input checked="" type="radio"/> Use Default <input type="radio"/> Use Value	Never
Auto Reduce Access	Controls how the system automatically reduces an employee's access level.	<input checked="" type="radio"/> Use Default <input type="radio"/> Use Value	Never
Auto Disable	Controls how the system automatically disables an employee.	<input checked="" type="radio"/> Use Default <input type="radio"/> Use Value	Never
Auto Activate	Controls whether or not the system automatically sends a notification with the activation code.	<input checked="" type="radio"/> Use Default <input type="radio"/> Use Value	On

4

Choose the W-2 Dropdown.
Fill in the appropriate contact information for **"Name, Phone,"** and so on.



The screenshot shows the 'Online Tax Forms Setup' form. The 'Choose a Tax Form' dropdown is set to 'W2'. The form contains several sections for entering information:

- W2 Form Administrator Information:** Name (John Smith), Phone (704 999 9999), Email (jsmith@gmail.com), Address 1 (12345 Main Street), City (Charlotte), State (NC - North Carolina), ZIP (12345).
- Paper Copy:** Instructions for employee to request a paper copy.
- Contact Info:** Instructions for employee to report a change in contact information.
- Enroll/ Release Information:** Enroll Date (Oct 1), Release Notify (Email), and a checkbox for 'Notify administrator when employee changes W2 enrollment choice'.

Buttons for 'Save Changes' and 'Undo Changes' are located at the bottom right.

SETUP ONLINE TAX FORMS

5

Enter the instructions that describe how an employee can receive a paper copy in the **“Paper Copy”** text area, if desired.

6

Enter the instructions for how an employee can contact the tax form administrator in the **“Contact Info”** text area, if desired

7

Determine the cut-off date, which is the last date on which an employee can enroll for this online tax form service, in the **“Enroll Date”** drop down lists.

8

Use the **“Release Notify”** drop down list to select the default method of notifying the employee that their tax form has been released.

These notifications are automatically generated whenever a release is performed for either all employees or an individual.

Valid entries include:

- **Email** – Sends an email to each employee.
- **Mail** – Creates a generated letter in PDF format that you can print and send via the postal service.
- **None** – Does nothing, employees are not automatically notified.

You are required by law to notify employees that their forms are available. If you choose the **“None”** method, you can notify each employee individually using the **“Notify Employee”** field.

9

Put a check in the **“Enroll Notify”** check box if you, the tax form administrator, want to be notified via email that an employee has changed their enrollment status for this service.

SETUP ONLINE TAX FORMS

10

When you are done, click **“Save Changes.”**

Next, change the **“Choose a Tax Form”** dropdown to 1099 and fill out the same information for the 1099 Form Administrator Information*. **Save Changes.**

The screenshot shows the 'Online Tax Forms Setup' interface. At the top left, there is a dropdown menu labeled 'Choose a Tax Form:' with 'W2' selected. This dropdown is circled in orange. Below this, the 'W2 Form Administrator Information' section contains several input fields: Name (John Smith), Phone (704, 999, 9999), Email (jsmith@gmail.com), Address 1 (12345 Main Street), Address 2, City (Charlotte), State (NC - North Carolina), and ZIP (12345). To the right, there are two informational boxes: 'Paper Copy' with instructions for requesting a paper copy, and 'Contact Info' with instructions for reporting a change in contact information. At the bottom, the 'Enroll/ Release Information' section includes an 'Enroll Date' (Oct 1) and a 'Release notify' dropdown (Email). A checkbox is checked for 'Notify administrator when employee changes W2 enrollment choice'. Two buttons, 'Save Changes' and 'Undo Changes', are located at the bottom right.

Please note that even if you do not currently have any employees who receive 1099 forms at the end of the year, the 1099 Form Administrator information must be completed in order to release tax forms to your employees*