

IOI ESS

Employee Self Service

***IOIPay* ESS 2.0 Administrators' Guide**



Applicant Tracking
& Onboarding



Payroll



Time & Attendance



Human Resources



Employee Self-Service

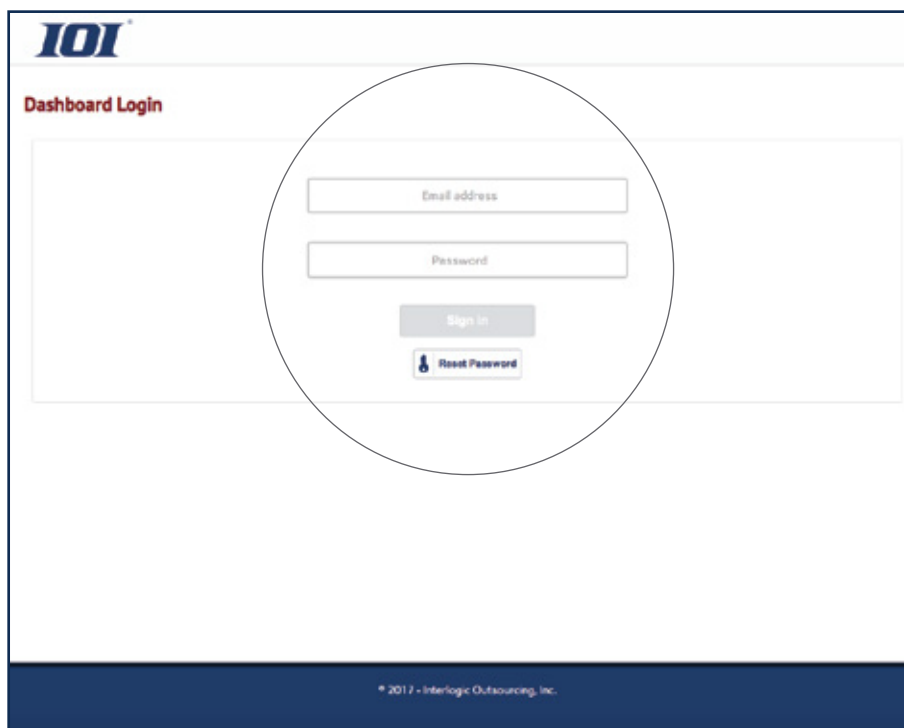
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Next Steps

1. Visit www.ioipay.com
2. Click on the **Employer Login** tab

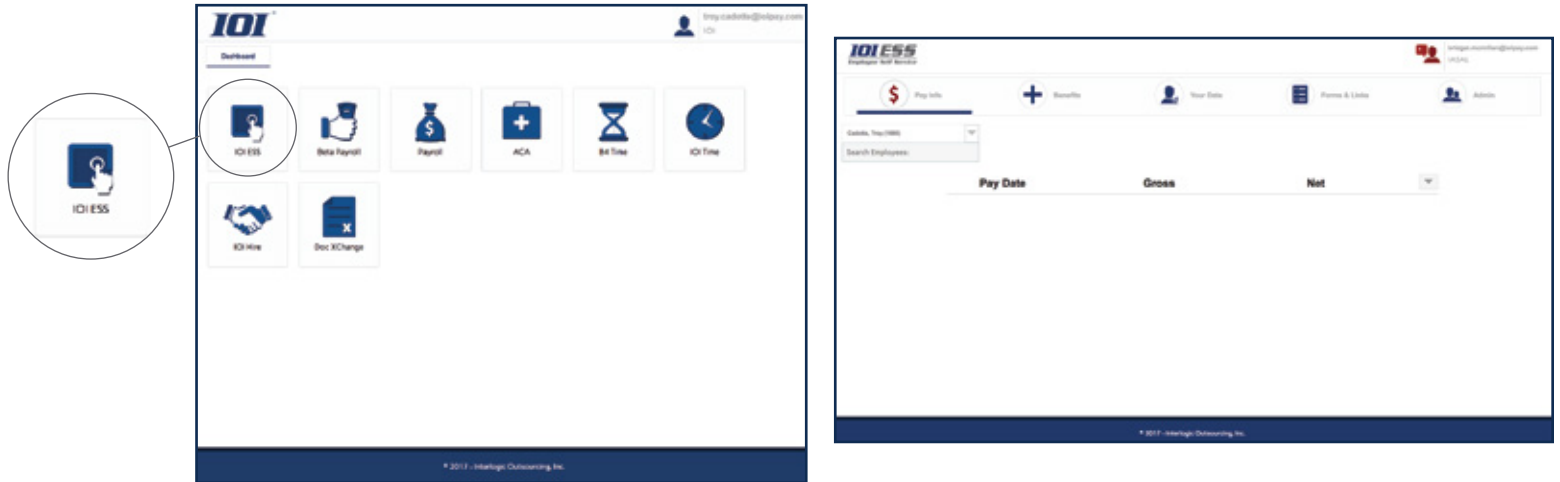


3. Once you click the Employer Login tab, you will be directed to the **Sign In Page**. Sign in with your credentials (your email address) and password

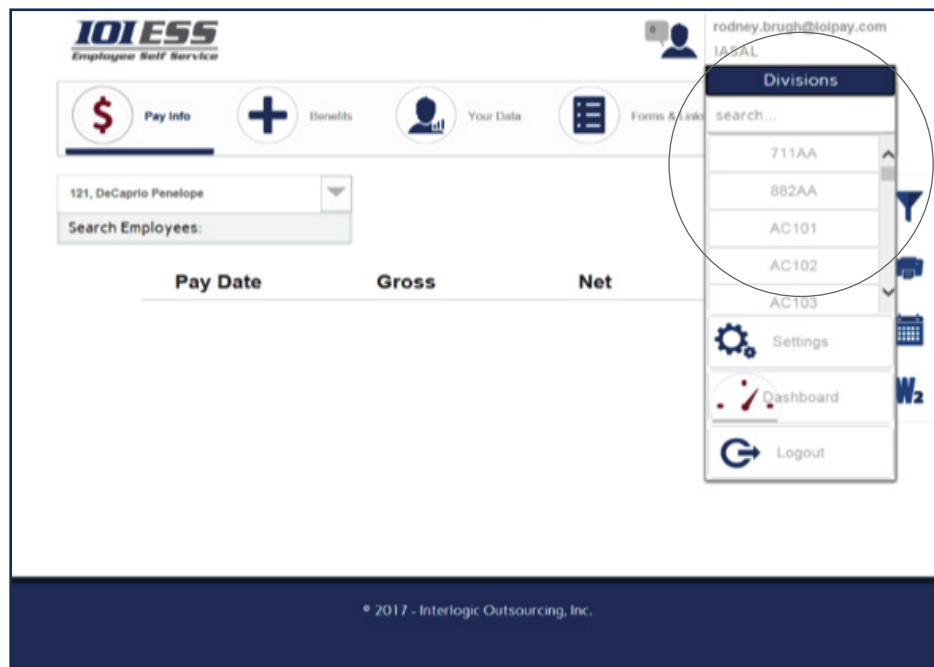


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4. Click on the **IOI ESS** icon located on the **IOIPay** Dashboard. This will take you to the **Employee Check Screen**



5. If you have **more than one division** you can easily toggle between your division(s). To switch division(s); hover over the current division listed in the top right corner of the screen, select the division from the drop down menu.



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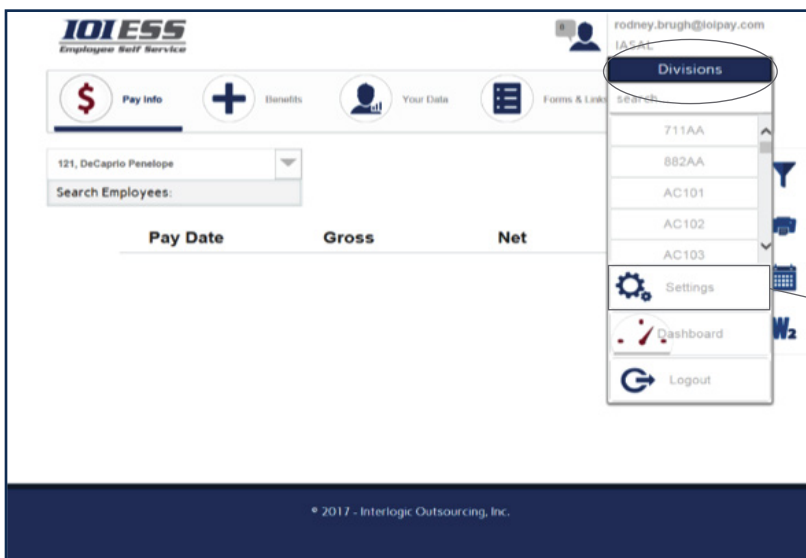
6. System Settings

A. Click on the **Settings** tab to set or edit ESS preferences.



B. The following can be set to **Display** on the screen:

- **Social Security Number** - full; last four digits or not at all
- **Miscellaneous Amounts** - if utilized in *IOIPay* can be selected to display the custom headings
- **Accrual Information** - allows employees to see their balances
- **Pending Checks** - allows employees to view pay information prior to the check date
- **Benefits** - if benefits are managed through HRIS, employees can view the benefits in which they currently participating. The benefit will display the employee/employer contributions.
- **Historic Benefits** - allows employees to view historic benefits
- **Permit Employee Data Request Changes** - allows employees to make edits to demographic information. If 'N', the screen will display as read only.
- **Permit Employee to Request Print Options** - if you are not 100% paperless, you can use this setting to allow your employees to have the option to turn on/off the printing of their check stub. If 'Y', administrator approval is required in *IOIPay* Self Service Updates for printing and delivery (additional fees may apply).


C. Click the **Red Arrow** to close the Settings menu






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7. **Notifications** are companywide and set up by the administrator. The icon in the upper right hand corner  will display the number of unread messages for the employee. Once the employee reads the messages, the number will return to '0' and the icon will turn blue .

A. Create a Message

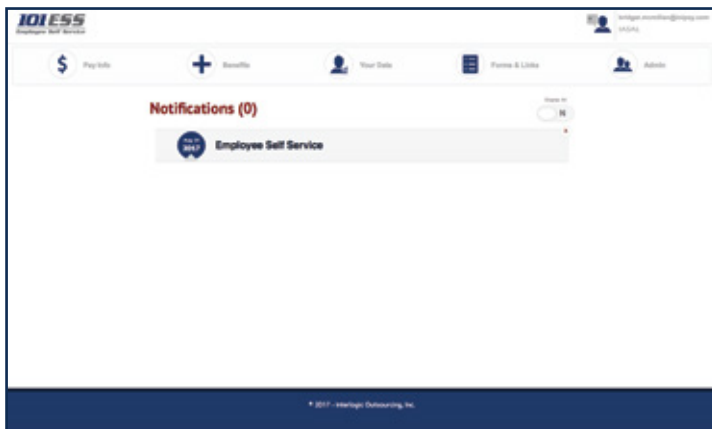
- Click the **Add Notice** icon 
- When the message opens, you can add a heading, date range for the notification to appear, and the details of the message
- Once completed, click **Add Notice**

B. Edit a Message

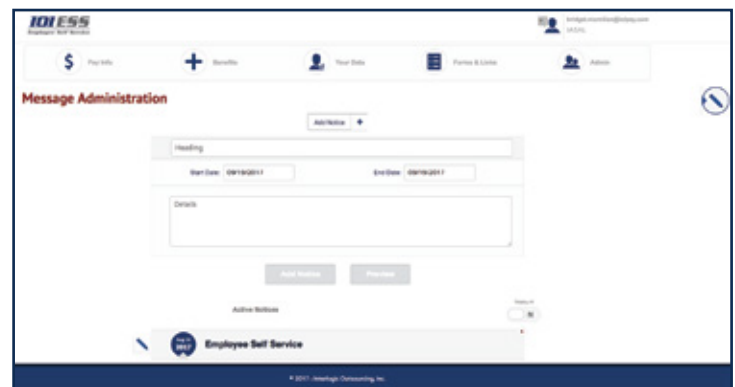
- Click on the **Person** icon  located at the top of the right hand side of the screen to open the notification screen.
- To make changes, hover over the **Pencil** icon , click on the word **Edit**  to make changes to existing notifications or to create a new one. Once edits are completed, click **Update**

C. Delete a Message

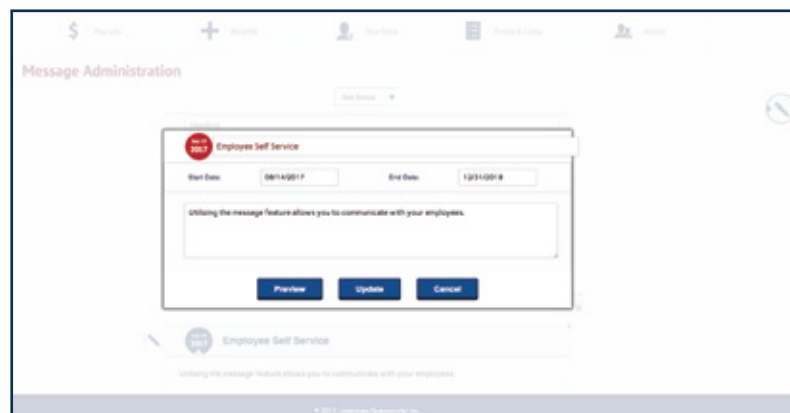
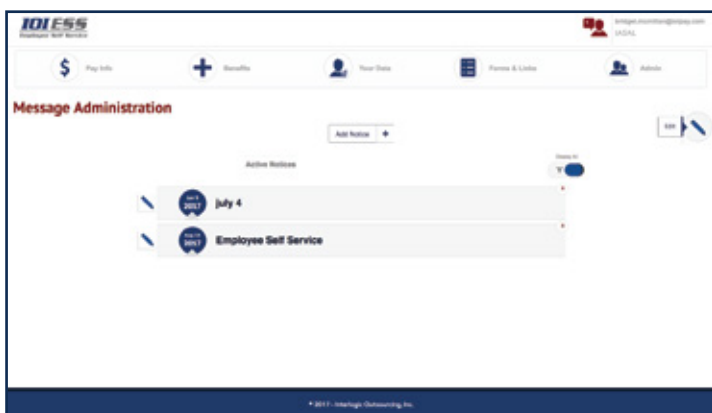
- Click **'X'**. A confirmation message will appear asking you to confirm the deletion.



A. Create a Message



B. Edit a Message



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8. Pay Info

A. **\$ Pay Info**, allows you to view employees' check stub information

B. To **search** for an employee click on the down arrow to view your employee listing

Note: Pay Dates are listed here, click the arrow on the right to open up more check details for that pay period, if you click print it will open the stub in a PDF.

9. Icons on the right of the screen:



Filter Icon – ability to select date ranges



Printer Icon - print single or multiple check stubs



Accruals Icon – shows Vacation/Sick balances



W2 Icon – view historic W2's

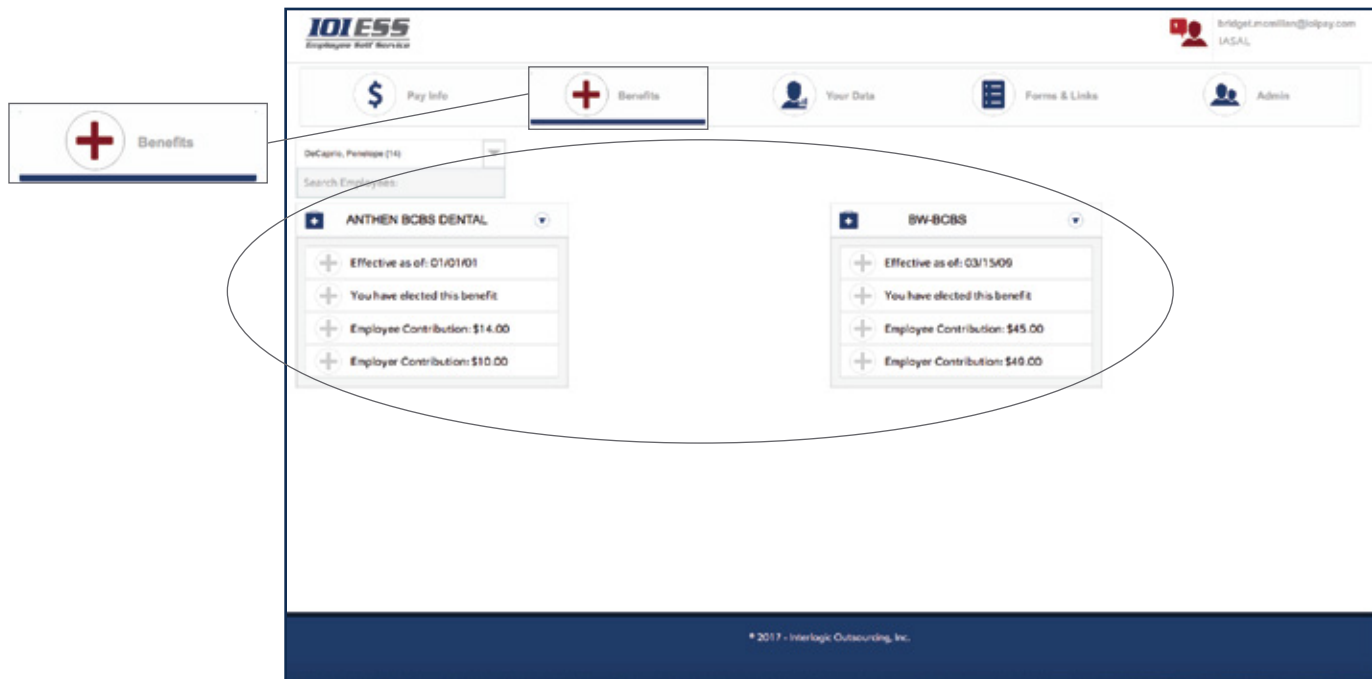
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10. If your company is utilizing **Benefits** in IOIPay's HRIS system, this tab will display current and historical benefits to the employee. The employee can view the employee and employer contribution on their benefit elections.

A. Select an employee from the employee listing. Click on the **Benefits** tab in the navigation menu

B. Click on the **arrow** next to the benefit to display more details

Note: if your company is not using the Benefits section within IOIPay HRIS, this feature can be turned off through the system settings



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11. **Your Data** displays basic demographic information for employees. You can set the screen to read only or allow employees to submit changes. changes need to be approved in *IOIPay* by the administrator.
- A. Select the employee you want to view form the left hand employee listing. You can also search for employees
 - B. Based on system settings, employees can either read or make changes to their information
 - C. If you allow your employees to make changes, you will need to **Accept, Deny** or **Defer** the changes in *IOIPay*
 - D. **Self Service Changes** will appear as a hyperlink above the Notice Board in *IOIPay*. You can also access the changes under the **Employee Maintenance** section, first option **Self Service Updates**
 - E. To save changes, click **Commit**




The screenshot shows the IOI ESS Employee Self Service interface. On the left, there is a sidebar with a 'Your Data' link and a search box containing 'Cadotte, Trey (1690)'. The main form is titled 'Your Data' and contains the following sections:

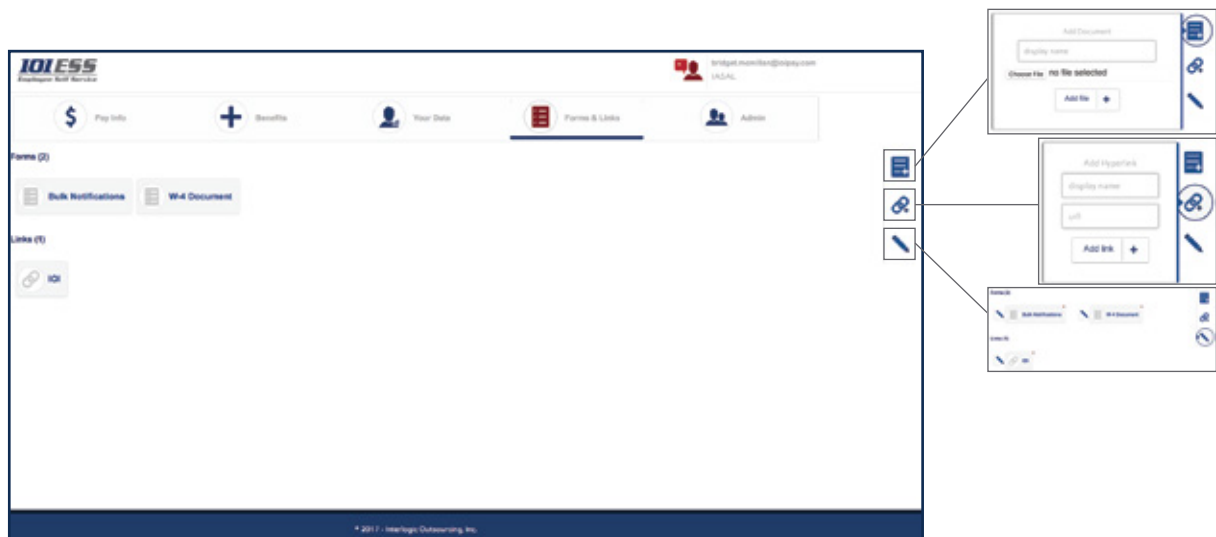
- Search Employees:** A search box with the text 'Cadotte, Trey (1690)' and a dropdown arrow.
- Your Information:** Fields for First Name (JOHN), Middle Name (ALEX), Last Name (ALLEN), Address (123 W 57TH ST), City (SOUTH BEND), State (IN), Zip Code (46726), and Birth Date (8/1/1970). There are also fields for Home, Work, and Cell phone numbers, and a Pager ID and Email Address field.
- Emergency Contact Info:** Fields for Name, Relationship, Home, Work, and Cell phone numbers for two contacts: Sally Allen (Spouse) and George McKinley (Uncle).
- Buttons:** A 'Reset' button and a 'Commit' button.

The screenshot shows the IOI Pay Payroll & Employer Services interface. The top section displays the company name 'IASAL' and 'IOI Payroll Services, Inc'. Below this, the 'Payroll Number: 2017-001-01' and 'Current Status: Open' are shown, along with a link to 'Self Service Changes'. The main section is titled 'Notice Board' and contains a large empty box for notices.

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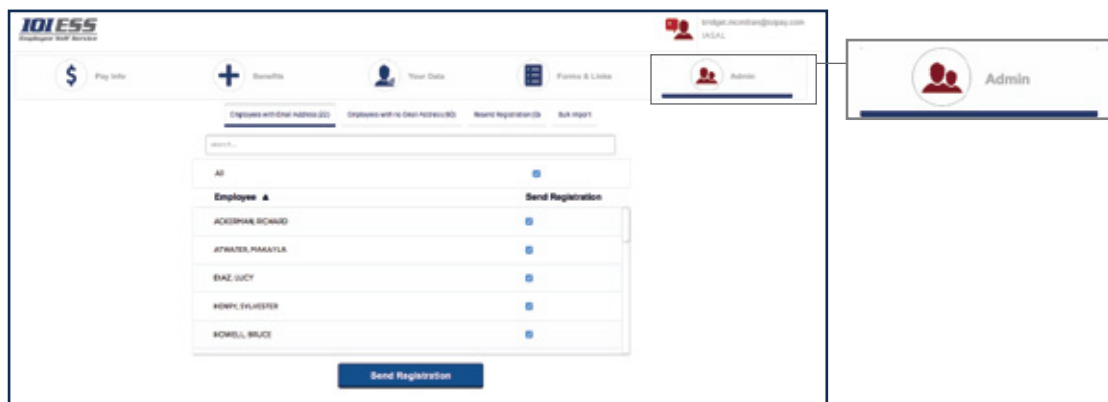
12. In the **Forms & Links** section administrators will now have the ability to manage any forms and internet links they would like to make available for their employees.

- A. To add a **Form** click on the **paper** icon  a small window will appear allowing you to browse your computer to attach the file
- B. Name the document, then click **Add File**
- C. To add an internet link click on the **chain** icon  a small window will appear allowing you to add the URL link. Add the name you want to appear next to the link
- D. To **edit** or **remove** a form or link click on the **pencil** icon  this will allow you to make edits. Clicking the **X** will remove the form or link.



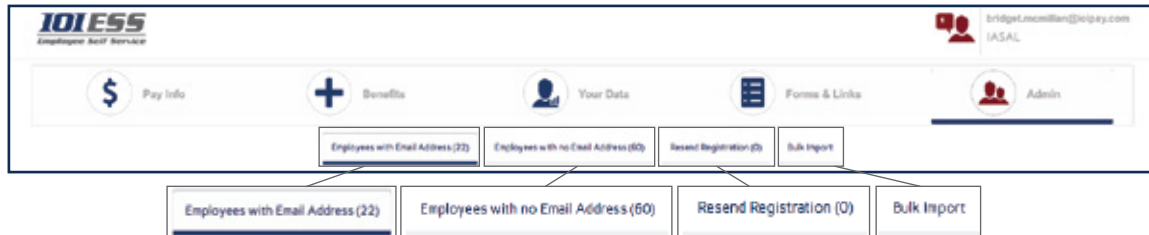
13. The **IOI ESS Admin** button will only appear with admin credentials. This is where you will set up your employee's registration. Employees will no longer be able to register, registration is pushed from the administrators.

- A. Click on the **Admin** tab along the top. Below are multiple options to register your employees.

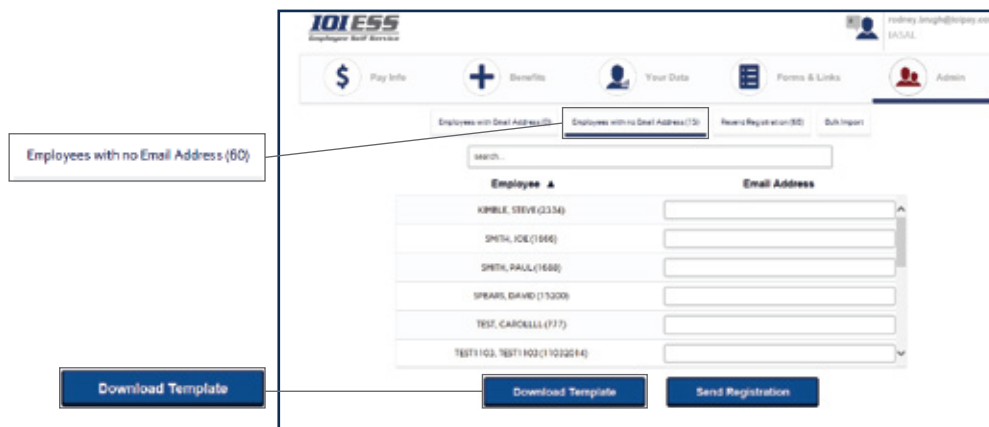


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- On this screen you have four tabs, **Employees with Email Address**, **Employees with no Email Address**, **Resend Registration**, **Bulk Import**.

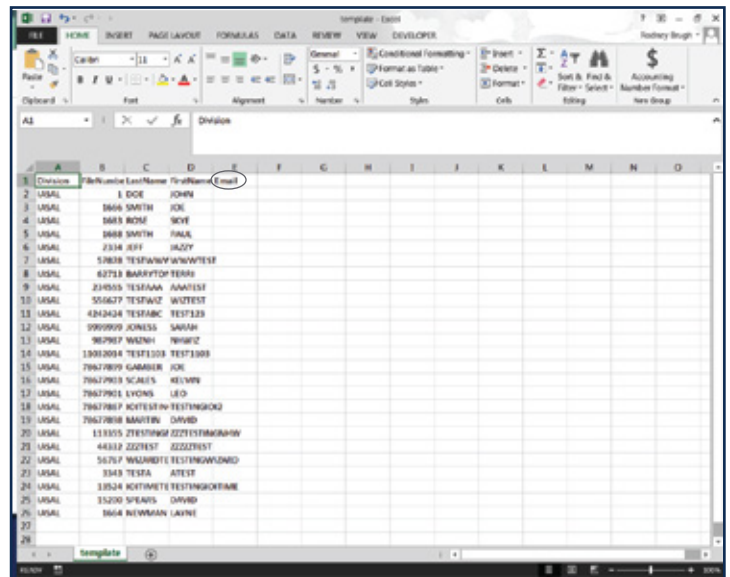


- Setting up your employee(s) in ESS 2.0 can be done easily with a bulk import. Download the template (located under the **Employee with no Email Address** section, at the bottom of the screen. The Template will have all employees listed.)



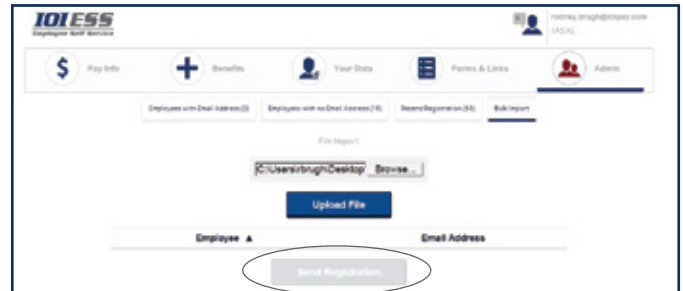
- Once you click **Download Template** you may see a window open at the bottom of your screen. The file will open in **Excel**, add employees email addresses that are missing.

NOTE: Do not change the format of the template. Save the document as a .CSV



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- Once you complete and save your Excel Template, you are ready to import your file into ESS 2.0. You will click on the **Bulk Import** tab, then click the **Browse** tab to find your saved file. Open the file and click on **Upload File**. Click **Send Registration**, this will send an email to the employee with a link to complete registration.



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IOIPay ESS 2.0 Administration

This feature is only available for ESS admins that have access to *IOIPay*. You are now capable of managing ESS users through the **Employee Demographic** screen. You will be able to **Create**, **Resend** or **Revoke** employee access.

A. Click on the **ESS Administration** tab at the top of the **Employee Demographic** screen in *IOIPay*. Select an employee.

- **Create**- Send registration to an employee not set up in ESS
- **Resend**- Resends the registration email to the employee. A confirmation message will appear.
- **Revoke**- Remove an employee's access to ESS A confirmation message will appear.
- **Bulk Creation**- This will take you to ESS 2.0 Admin section. (See step 13 for Bulk Import instructions).

Note: If you are only creating a registration for one employee make sure you are on the correct employee before you click on the **ESS Administration** tab. If creating a bulk entry, when you click the link and the window opens you will see a list of your employees to send a **Bulk Registration**.

The screenshots illustrate the workflow for managing employee access in the IOIPay ESS 2.0 system:

- Top Left:** The 'Employee Demographics' screen with the 'ESS Administration' dropdown menu open, showing options: 'Resend ESS Account', 'Revoke ESS Account', and 'Bulk Creation'.
- Top Right:** The same screen with a 'Resend or Revoke' modal window displayed, asking 'Resend account registration for Michael AAATest?' with 'Resend' and 'Cancel' buttons.
- Bottom Left:** The same screen with a 'Revoke Ess Account' modal window displayed, asking 'Are you sure you want to Revoke the ESS Account for Michael AAATest?' with 'Yes' and 'No' buttons.
- Bottom Right:** A separate window titled 'IOI ESS Employee Bulk Service' showing a search bar and buttons for 'Send Registration' and 'Bulk Import'.