



Dave Yost • Auditor of State

TO: UAN Users
FROM: UAN Support
DATE: November 30, 2015
SUBJECT: Steps for Emailing EFT Pay Stubs

A new feature has been added to the UAN software's EFT function which enables clients to email EFT pay stubs for participating employees. This new feature is optional, and your entity must be currently using the EFT function in the application. Prior to utilizing this new feature, your entity's governing board should implement a policy for emailing employee EFT pay stubs. As part of that policy, we highly recommend utilizing the "Send Test" option that is available in each area of the setup process. We also recommend utilizing the password protection option when emailing employees their EFT pay stubs.

Before beginning the setup process for emailing EFT pay stubs, please contact your internal Information Technology (IT) department or email provider (which may be your internet service provider) to obtain the following information pertaining to your email server settings:

- SMTP Host
- SMTP Port
- SSL Login settings (if applicable)

The instructions that follow step you through how to setup this new EFT feature in the UAN software. The first group of steps, detail how to setup the entity's email account the EFT pay stubs will be sent "From". The second group of steps, detail how to setup a participating employee's email account their individual EFT pay stub will be sent "To". The last group of steps, detail how to email the EFT pay stubs to participating employees as well as resending emails of EFT pay stubs if needed.

HOW TO SETUP ENTITY'S EMAIL ADDRESS TO SEND EFT PAY STUBS

Step 1: Select **General > Maintenance > Entity Setup**.

Step 2: Click on the **Wages** tab.

Step 3: Under the **Employee Emails** section, select the **Activate Employee Emails** radio button.

- Step 4:** Enter the **“From” Name**. This is the name that will be displayed as the sender of emails generated through UAN. Enter the name of the entity or department that you would like to be displayed in the employee’s email inbox when they receive their EFT pay stub. An example would be ‘Village of Ohio’ or ‘Buckeye Township Trustees’. We recommend that you do not use an individual’s name as the “From” name.
- Step 5:** Enter the **Email Address** that will be used to send the EFT pay stub.
- Step 6:** Enter the **SMTP Host**. Contact your internal IT department or email provider (which may be your internet service provider) to get this information.
- Step 7:** Enter the **SMTP Port**. Contact your internal IT department or email provider (which may be your internet service provider) to get this information.
- Step 8:** Select **Yes** or **No** for the **SSL Login** radio button. Contact your internal IT department or email provider (which may be your internet service provider) to get this information.
- Step 9:** If you selected **No** in Step 8, skip to Step 12. If you selected **Yes** in Step 8, select either the **Default Login** or **Custom Login** radio button. Contact your internal IT department or email provider (which may be your internet service provider) to get this information.
- Step 10:** If you selected **Default Login** in Step 9, skip to Step 12. If you selected **Custom Login** in Step 9, enter the **Username** of the email address entered in Step 5 (most likely the **Username** is the same as the actual email address entered in Step 5).
- Step 11:** Enter the **Password** of the email address entered in Step 5.
- Step 12:** Click **Save**.
- Step 13:** Select the **Send Test** button to send a test email to the email address entered in Step 5.
- Step 14:** A system message will be displayed stating the test email was sent successfully. Click **OK** on the message. If the test email was not sent successfully, contact your internal IT department or email provider (which may be your internet service provider) to review the information entered above.
- Step 15:** Verify the test email was received by checking the inbox of the email address that was entered in Step 5. If you cannot find the email, check your spam filter. The email will be worded as shown below:

The UAN test email has been sent and received successfully.

A PDF file is attached to this email to simulate sending PDF files to your employees. The file is password protected, which is an option you will be offered when emailing PDF files in UAN. The password for this example test PDF is simply: 1234

Employees may be set to receive their EFT pay stubs via email by editing the individual employees and marking the “Stub email is authorized” checkbox in the Electronic Funds Transfer (EFT) area of the Edit Employee form. Alternatively, the “Email

Editor” in Payroll > Maintenance may be used to quickly authorize the email option and/or edit email addresses for multiple employees at once. If you require additional assistance, contact UAN Support.

Reminder: Enter password 1234 to open the PDF attachment.

Step 16: Click the **Close** button to close the Entity Setup screen.

HOW TO SETUP EMPLOYEES TO RECEIVE EFT PAY STUBS BY EMAIL

To setup an *individual employee* to receive their EFT pay stub by email follow the steps below:

Step 1: Select **Payroll > Maintenance > Employees**.

Step 2: Select the **Employee**. Then select **Edit** and **Advanced**.

Step 3: Place a checkmark in the **Stub email is authorized** checkbox located in the **Electronic Funds Transfer (EFT)** section of the **Information** tab.

Step 4: In the **Email** field on the **Information** tab, enter the email address the employee has chosen to have their EFT pay stub sent to.

Step 5: Select **Save**.

Step 6: Select the **Send Test** button to send a test email to the employee.

Step 7: A system message will be displayed stating how many emails were sent. Click **OK** on the message. If the test email was not sent successfully, verify the email address entered in Step 4 above.

Step 8: Have the employee verify they received the test email. The email will be worded as shown below:

The UAN test email has been sent and received successfully.

A PDF file is attached to this email to simulate receiving PDF pay stubs from your employer. The file is password protected, which is an option the employer may choose when emailing PDF files to you. The password for this example test PDF is the last 4 digits of your Social Security Number.

If you have any questions about this email, contact your employer.

Reminder: The employee will need to use the last 4 digits of their SSN as the password to open the PDF attachment.

Please Note: We do not have any control over an employee’s email blocking settings. If the email is showing up in their spam folder instead of their inbox, they will need to allow emails from this sender. If they continue to have issues receiving the email, they may need to contact their email provider for guidance.

Step 9: Click the **Close** button to close the Edit Employee screen.

To setup **multiple employees** to receive their EFT pay stub by email follow the steps below:

- Step 1:** Select **Payroll > Maintenance > Email Editor**.
- Step 2:** The **Pay Status** selection defaults to **All** so that all employees are displayed in the Email Editor grid. It can be changed to **Active** so that only active employees are displayed in the Email Editor grid.
- Step 3:** The **EFT Authorized** selection defaults to **Yes** so that only employees that are authorized for EFT are displayed in the Email Editor grid.
- Step 4:** Place a checkmark in the **Email Authorized** column for the employees that have requested to receive their EFT pay stub by email.
- Step 5:** In the **Email Address** column, enter the email address for each of the participating employees.
- Step 6:** Select **Save**.
- Step 7:** The system will display the following message, “Send a test email to the edited employees? You will be able to select any or all of the edited employees.” Select **Yes**.
- Please Note:** If the message above was not displayed or you answered **No** on the message, you can still send a test email to employees by clicking on the **Send Test** button.
- Step 8:** An **Email Options** screen will be displayed with a list of the employees that were just authorized to receive EFT pay stub emailed. Select **OK** to send a test email to each of the pre-selected employees.
- Step 9:** A system message will be displayed stating how many emails were sent. Click **OK** on the message. If the test email was not sent successfully, verify the email address entered in Step 5 above.
- Step 10:** Have each of the employees verify they received the test email. The email will be worded as shown below:

The UAN test email has been sent and received successfully.

A PDF file is attached to this email to simulate receiving PDF pay stubs from your employer. The file is password protected, which is an option the employer may choose when emailing PDF files to you. The password for this example test PDF is the last 4 digits of your Social Security Number.

If you have any questions about this email, contact your employer.

Reminder: The employee will need to use the last 4 digits of their SSN as the password to open the PDF attachment.

Please Note: We do not have any control over an employee’s email blocking settings. If the email is showing up in their spam folder instead of their inbox, they will need to

allow emails from this sender. If they continue to have issues receiving the email, they may need to contact their email provider for guidance.

Step 11: Click the **Close** button to close the Email Editor screen.

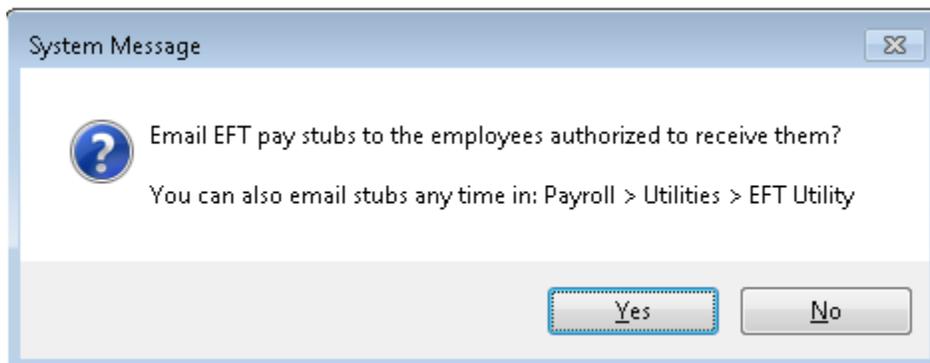
HOW TO EMAIL EFT PAY STUBS TO EMPLOYEES

Step 1: Post **Wages** as normal. The EFT pay stubs that print during this process are for your entity's records. If you have set the software to print more than one copy of the EFT pay stub under **General > Maintenance > User Preferences > Wages**, reset it to **print 1 copy**.

Step 2: Select **Payroll > Transactions > EFT**.

Step 3: Create the **EFT file** as normal.

Step 4: Once the EFT file has been created, the system message below will be displayed. Select **Yes** on this message.



Step 5: An **Email Options** screen will be displayed. You may enter information into the **Email Body** field. Information to enter would include who to contact for questions and a reminder that their PDF password on the attachment is the last 4 digits of their SSN (if you select to password protect the PDF attachment). After the first time, these settings will default to what was selected the previous time.

Step 6: We highly recommend you select the option to **Password protect the PDF attachment**. After the first time, this setting will default to what was selected the previous time.

Step 7: If you would like to print a copy of the pay stub for the employees that have not opted to receive their pay stub by email, select the **Print paper copies** option. After the first time, this setting will default to what was selected the previous time.

Step 8: On the **Employees** tab, select the **employees** in this EFT batch that you would like to send an email of their EFT pay stub (if setup to receive their pay stub by email) or print a paper copy of the EFT pay stub (if not setup to receive their pay stub by email).

Step 9: Select **OK**.

Step 10: A system message will be displayed stating how many emails were sent. Click **OK** on the message.

Please Note: We do not have any control over an employee's email blocking settings. If the email is showing up in their spam folder instead of their inbox, they will need to allow emails from this sender. If they continue to have issues receiving the email, they may need to contact their email provider for guidance.

Step 11: Click the **Close** button to close the EFT screen.

HOW TO RESEND EMAILS OF EFT PAY STUBS TO EMPLOYEES

Step 1: Select **Payroll > Utilities > EFT Utility**.

Step 2: Select the **EFT Batch** in the grid that contains the EFT pay stubs that need to be resent.

Step 3: Select the **Email** button.

Step 4: An **Email Options** screen will be displayed. You may enter information into the **Email Body** field. Information to enter would include who to contact for questions and a reminder that their PDF password on the attachment is the last 4 digits of their SSN (if you select to password protect the PDF attachment). After the first time, these settings will default to what was selected the previous time.

Step 5: We highly recommend you select the option to **Password protect the PDF attachment**. After the first time, this setting will default to what was selected the previous time.

Step 6: If you would like to print a copy of the pay stub for the employees that have not opted to receive their pay stub by email, select **Print paper copies** option. After the first time, this setting will default to what was selected the previous time.

Step 7: On the **Employees** tab, select the **employees** in this EFT batch that you would like to resend an email of their EFT pay stub (if setup to receive their pay stub by email) or reprint a paper copy of the EFT pay stub (if not setup to receive their pay stub by email).

Step 8: Select **OK**.

Step 9: A system message will be displayed stating how many emails were sent. Click **OK** on the message.

Please Note: We do not have any control over an employee's email blocking settings. If the email is showing up in their spam folder instead of their inbox, they will need to allow emails from this sender. If they continue to have issues receiving the email, they may need to contact their email provider for guidance.