Introduction

Navigate to **Employee Admin Tools> Employee Administration > Self-Service Management** to access the Self Service Management screen. Employers can manage all employee emails sent and their status when using the Self-Service Management tool.

Self-Service Management

The **Self-Service Management** screen has four tabs across the top. They are:

- Account Status
- Enable Access
- Inactive Accounts
- Resend Emails
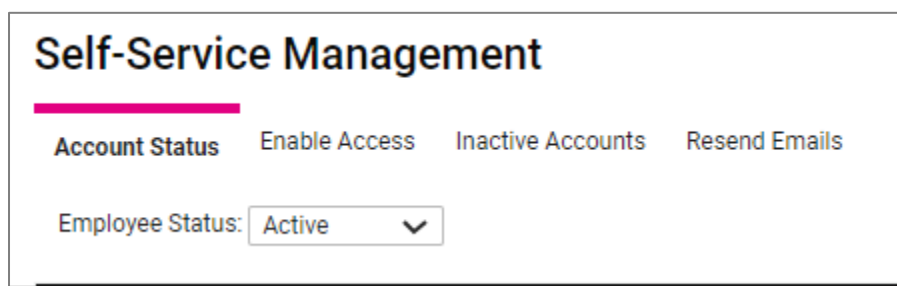
The screen defaults to an **Employee Status** of "Active," which includes inactive. However, it can be changed to "Terminated."

Account Status

The **Account Status** tab is an overview of the status of your employees' ESS usage, which you need for managing Employee Self-Service.

On this screen you can:

- Filter by selected columns
- Export all data by using the "xlsx" icon in the upper right
- Use the "paper' icon to the left to "View User Activity" for an employee
- Click on the name of an employee to be routed to the **General** screen, where you can make necessary updates
- View the status of all users for self-service being enabled, the email address in use, the last login date, and more

Enable Access

For those employees with self-service email (access not enabled), this means the self-service email has not been sent to these employees to be able to access their accounts. One option is to navigate to **Employee Management > General** for each employee and click the box that says "Enable Self-Service Access" and click **Save**.

However, in order to send the self-service email to all the employees simultaneously, navigate to **Self-Service Management > Enable Access**. Select all by clicking on the box at the top of the column indicated by **Enable** and send email or select the employees individually. Once selected, click **Process**.

Inactive Accounts

In order to manage who has not authorized their Employee Self-Service account after the initial email was sent out, navigate to **Self-Service Management > Inactive Accounts**. This screen lists all enabled employees not yet authorized. From this screen, you can select the employee (s) and click "Send/Resent email" and **Process**.

Resend Emails

Under **Resend Emails** tab of the **Self-Service Management** screen, you can search for a specific email sent to the employee.

In order to see the employees sent an email in the last 30 days, you must enter the following:

- **Date Sent From**
- **Date Sent To:** These dates cannot exceed a 30-date range. You are not able to add future dates.
- **Email Type:** You can filter by the following types:
    - Benefits
    - Certifications
    - Compensation Management
    - Corrective Actions
    - Employee Messages
    - Employee Notices
    - Employee Self-Service Activation
    - Expense
    - Mass Email
    - Paystub Alerts
    - Performance Reviews
    - Qualifying Life Events
    - Workflow (including Onboarding)
    - YE Tax Form Notification

- **Email Template:** You can select the specific Email template used. The drop-down menu options will change based on the Email Template Email Type selected under **Client Management > Workflow Setup > Email Templates.**
- **Employee Status:** The default is "Active." Select from:
  - Active
  - Inactive
  - Terminated
  - Other status as added
- **Org Category:** The default is "All." All organization levels set up at the client-level will appear in the drop-down box menu.
- **Value:** The default is "All." All values from the organization table set up at the client-level will appear for the category selected above.
- **Pay Group:** The default is "All." If multiple pay groups are set up at the client-level, they will be available for selection in the drop-down menu.

Once the Email is found, select the employee (s) by clicking on "Resend email" or select a specific employee (s). Click on **Process**