SECTION

3

Payroll Specialist Roles

Obtaining a user ID and password

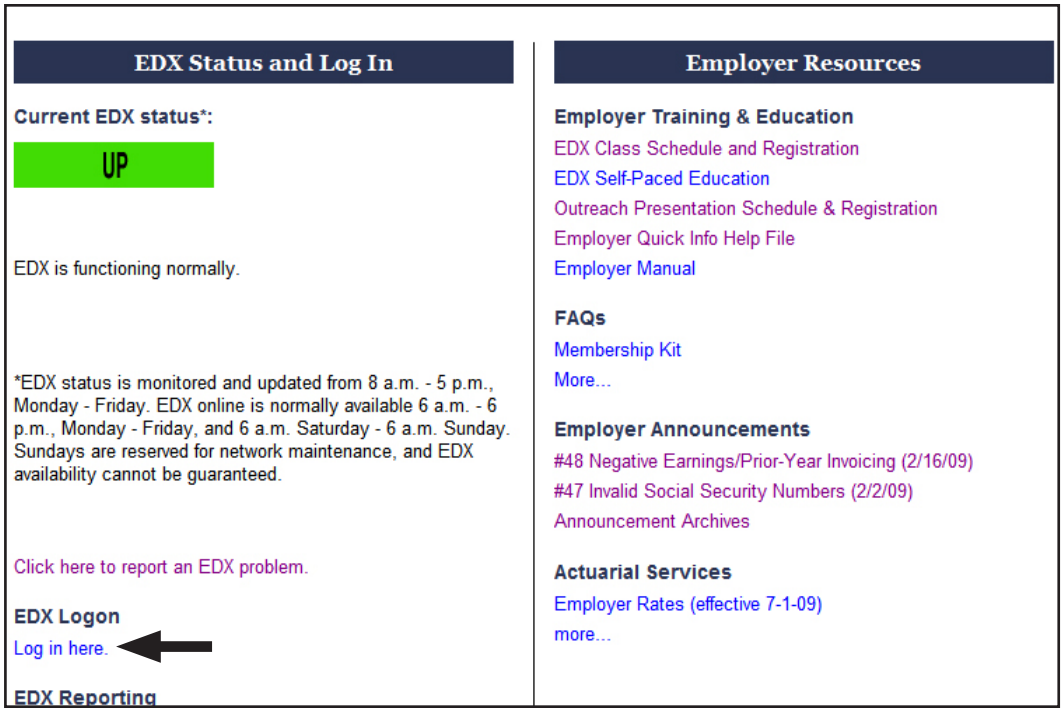
You can create a payroll specialist account in EDX without special authorization. During that process, you supply your own account information, including a user ID and password. Your Web administrator will then need to activate your account before you can log in and use the system.

Creating a payroll specialist account

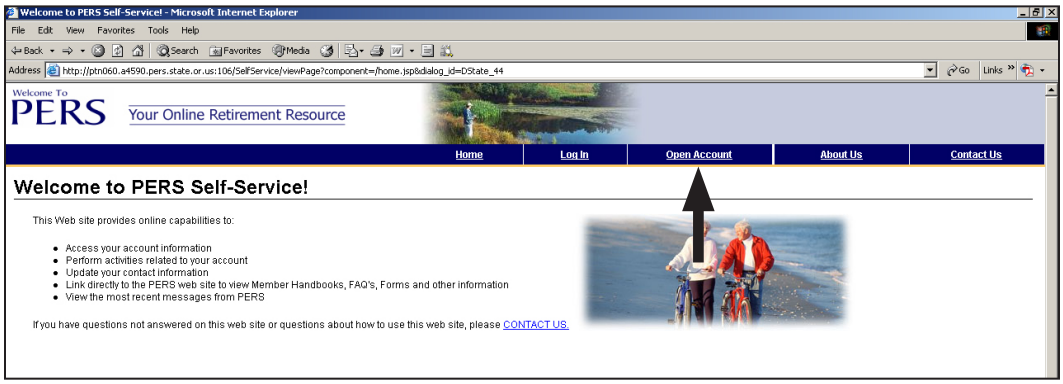
Accessing the Employer Payroll Account Creation page

1 Go to the PERS Employer website at http://oregon.gov/PERS/EMP/index.shtml.

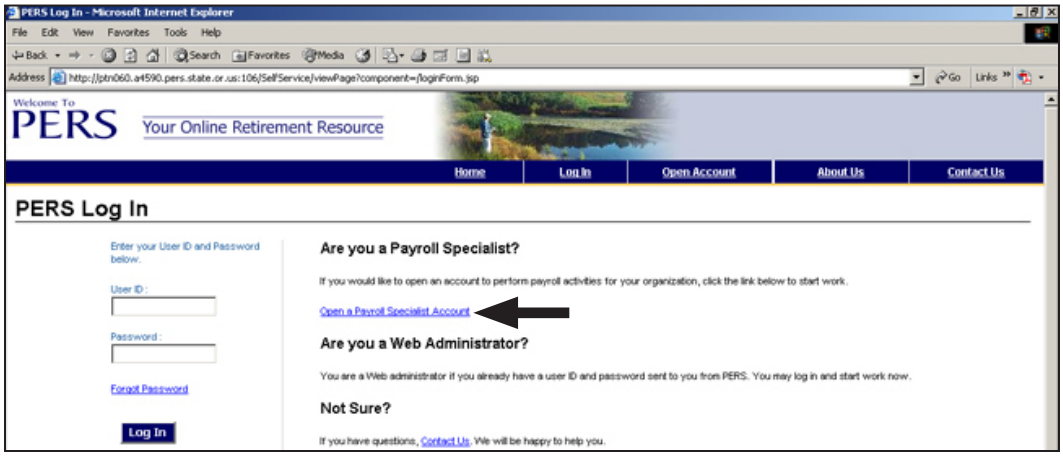
2 Click on the **Log in here** link (highlighted by the arrow).



3 Click on the **Open Account** link (indicated by the arrow) to display the *PERS Log In Page* screen.



4 Click on the **Open a Payroll Specialist Account** link (indicated by the arrow) to display the *Employer Payroll Account Creation* screen.



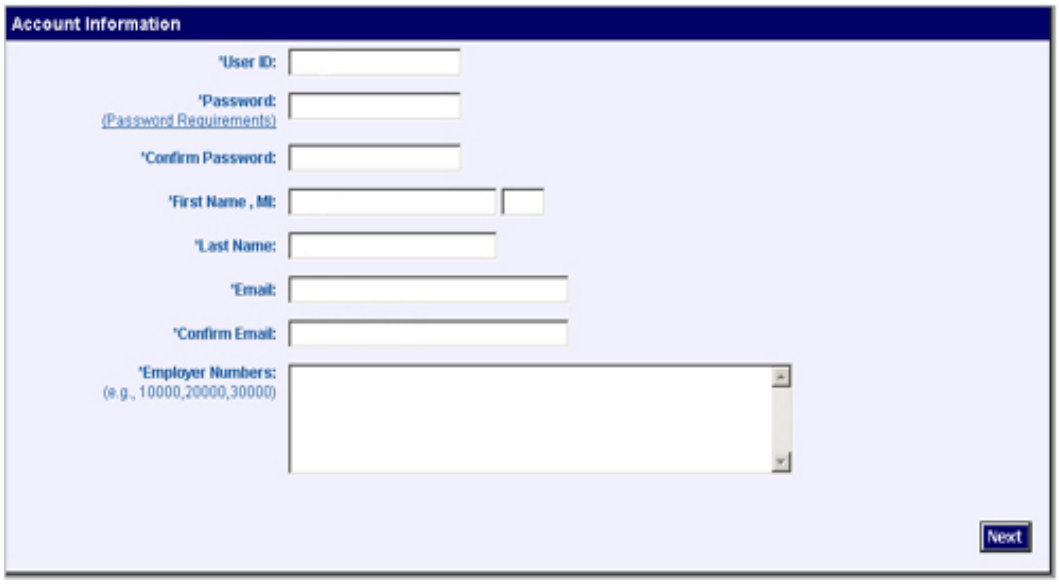
Entering new personal profile information

The following steps outline the procedure to set up a payroll specialist account for yourself. Your Web administrator must then grant you access rights before you can access EDX as a payroll specialist.

Important: Web administrators activate payroll specialist accounts; they **do not** create payroll specialist accounts.

1 Follow the steps outlined in the previous topic.

Note: The illustration below applies to the next seven steps.



2 In the **User ID** text box, type a user ID.

Note: This ID cannot be claimed by another user and must be a minimum of six characters. You can use any combination of letters and/or numbers.

3 In the **Password** text box, type a password. **Important:** Passwords must be a minimum of seven characters and must contain three of the four following character types:

- Uppercase letters (A–Z)
- Lowercase letters (a–z)
- Numeric characters (0–9)
- Non-alphanumeric characters (#, @, %, etc.)

Example: **MyPassw0rd**.

The password you type must not contain three or more characters from your user account name.

Write down the password for future reference. If you forget your password, contact your Web administrator.

4 In the **Confirm Password** text box, retype your password.

5 In the **First Name**, **MI**, and **Last Name** text boxes, type your name.

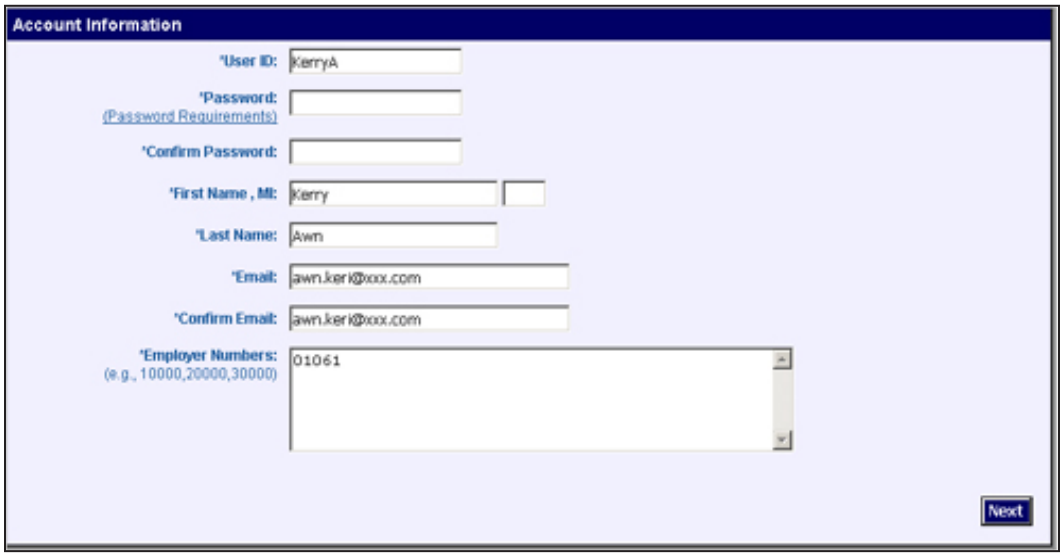
6 In the **E-mail** text box, type your e-mail address.

7 In the **Confirm E-mail** text box, retype your e-mail address.

8 In the **Employer Numbers** text box, type the employer number(s) for the employer account(s) you want to access.

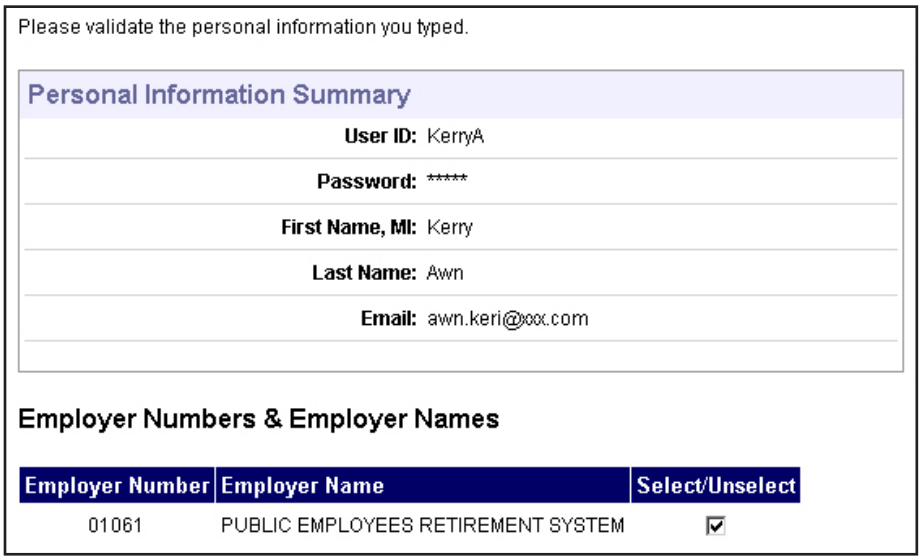
You must type at least one employer number. When entering multiple numbers, enter a comma between each number. Type the employer number as a five-digit number. If your number is four digits, type a leading zero. For example, if your employer number is 1111, type **01111**.

9 Click the **Next** button to view the *Employer Payroll Account Validation* screen.



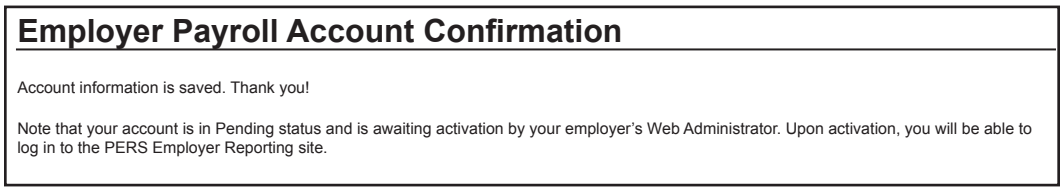
Reviewing new personal profile information

1 Review the accuracy of your personal account profile information and requested employers on the *Employer Payroll Account Validation* screen.



2 Click the **Save Account** button to confirm the information, or click the **Cancel** button to return to the previous page.

When you click the **Save Account** button, a confirmation page appears that shows the new account is "Pending," awaiting action by your Web administrator.

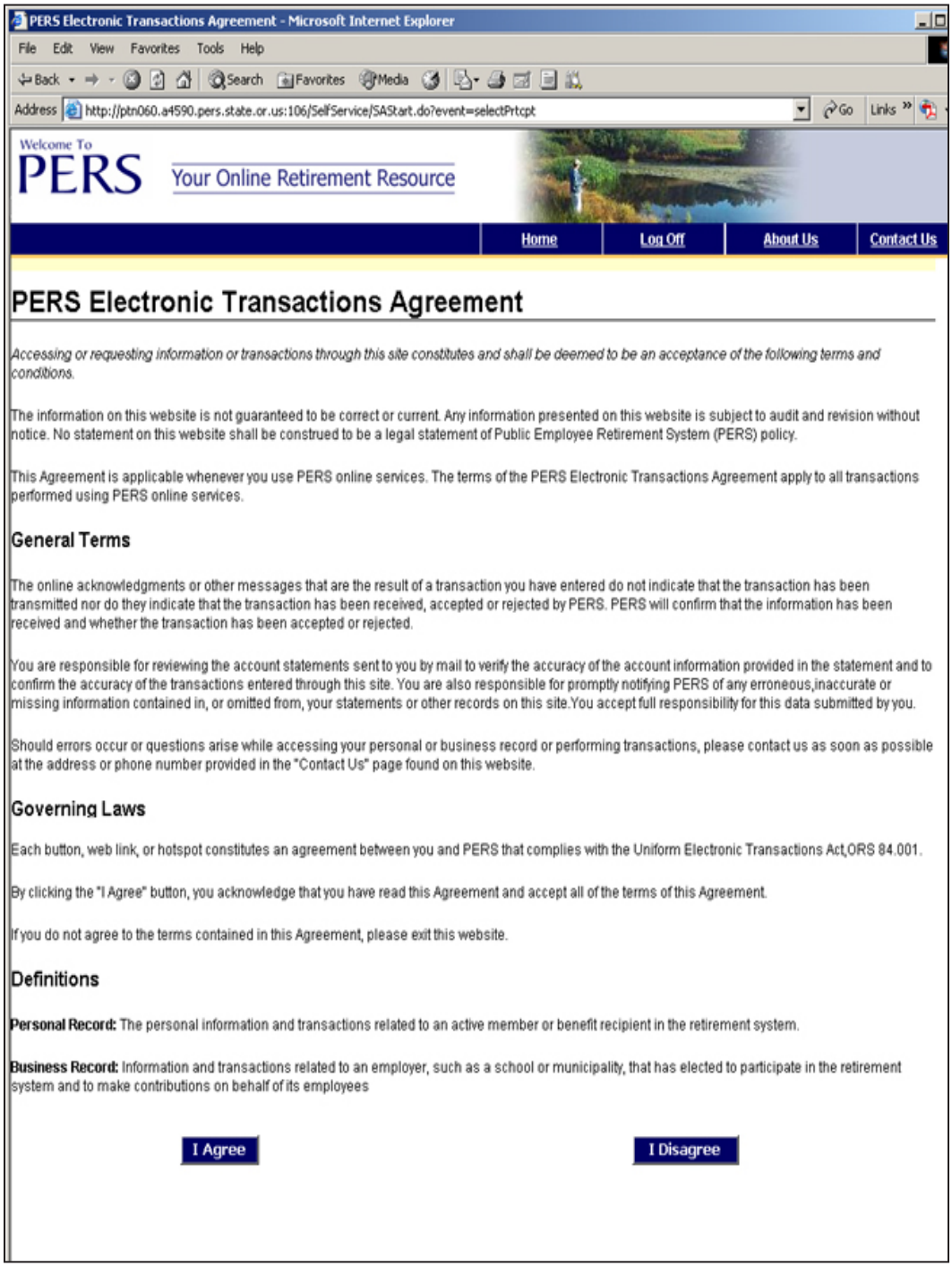


Note: EDX will notify you by e-mail when the your Web administrator activates your account. Until then, you cannot log on to EDX. If you requested access to multiple employers, each employer's Web administrator must activate your account before you can access their information.

Logging on to EDX for the first time

1. Log on to EDX following the instructions outlined on pages 6–8.

2. Review the *PERS Electronic Transactions Agreement*, and then click the **I Agree** button.



Updating your account profile

Update your account profile any time you need to (1) change your password or e-mail address or (2) request the right to work with additional employers.

1 Log on to EDX from the *Welcome to PERS Self-Service* screen following the instructions outlined on pages 6–8.

2 Click on the **Update My Profile** link (indicated by the arrow) to display the *Update My Account Profile* screen.

3 In the **Password** text box, type your new password. **Important:** Passwords must be a minimum of seven characters and must contain three of the four following character types:

- Uppercase letters (A–Z)
- Lowercase letters (a–z)
- Numeric characters (0–9)
- Non-alphanumeric characters (#, @, %, etc.)

Example: **MyPassw0rd**.

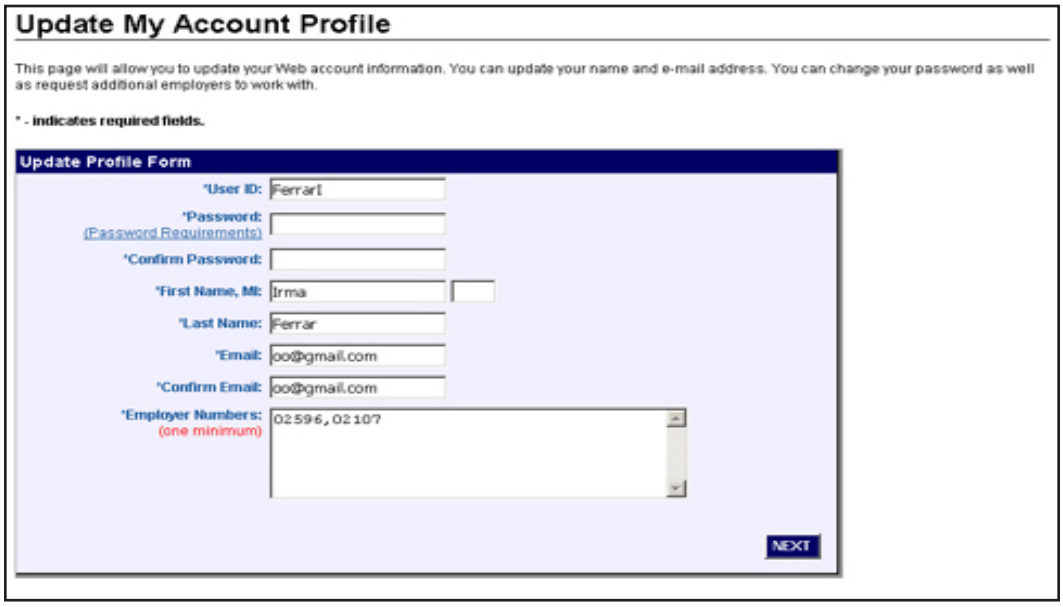
The password you type must not contain three or more characters from your user account name.

Write down the password for future reference. If you forget your password, contact your Web administrator.

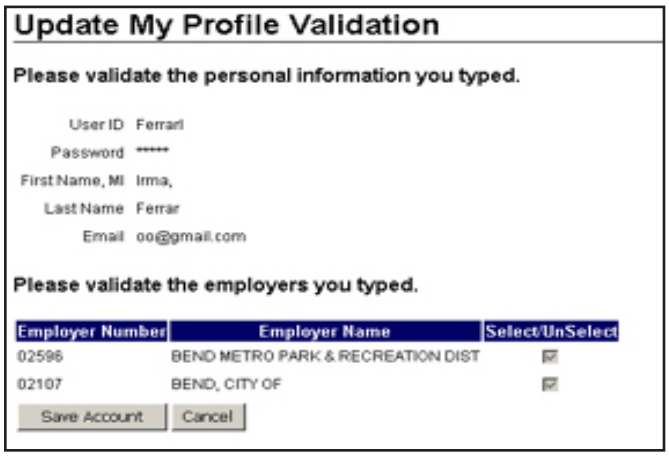
4 In the **Confirm Password** text box, retype the new password.

5 Modify your profile information, as necessary, and then click the **NEXT** button to view the *Update My Profile Validation* screen. **Note:** You cannot delete employer numbers, only add them.

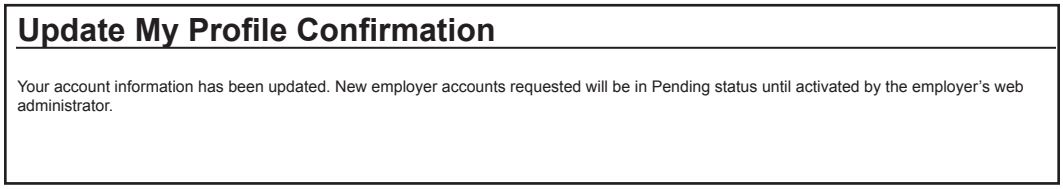
Important: An asterisk (*) next to the field name denotes that the field cannot be left blank.



6 Review your profile information for accuracy. If information is incorrect, click the **Cancel** button to return to the previous page to make the necessary changes.



7 Remove a listed employer from your profile by unchecking the **Select/Unselect** check box (indicated by the arrow) next to the employer.

Note: Check marks in grayed-out check boxes cannot be unchecked. Check boxes become grayed out once you save the account.

8 Click the **Save Account** button; the *Update My Profile Confirmation* screen appears, stating your updated account information is awaiting activation by the Web administrator.