# ExpertPay<sup>®</sup> Employers

# **ExpertPay Employers Online Help Manual**

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## Introduction to Employer's Online Help

Welcome to the Employers' Online Help for ExpertPay.

ExpertPay provides useful functions, maintains employer data, and facilitates the federally mandated payment of child support payments withheld from employees.

ExpertPay allows you (the employer) to:

- Submit child support payments that you withhold from your employees' paychecks via the Internet.
- Save and maintain employee payment information for quick transactions.
- Add users to the employer's ExpertPay account which allows other employees on your payroll/human resources team to use ExpertPay. In addition, each user's access may be limited or unlimited, depending on how the user's security level is set up.
- Setup Recurring Automatic Withdrawal payments.
- Run payment reports.

## System Overview

ExpertPay allows the employer to make payments to the state disbursement unit via the Internet.

To make it easier to submit payments each pay period, ExpertPay uses a system of payroll lists, called Payment Groups. These are simply lists that you will create and name for different categories of employees.

For example, if you have a weekly payroll, you may create a profile named "Weekly Payroll" on the web site and enter the payment information about each weekly employee for whom you are withholding. This profile is then used each week to create the actual payment submission. As long as the profile does not change, you simply enter the new withholding and effective dates and your payment is on its way. You can also make one time changes to a payment as required without affecting the profile.

You can create as many separate Payment Groups as you need. You will probably need a weekly and a monthly profile, for example. If you have more than one facility in the state, you can create separate profiles for each facility, and if you registered more than one bank account, you can use different bank accounts for different profiles.

#### Definitions

Withholding Date	The date on which the money was deducted from the employees' wages or salary. Same as payday, usually.
Effective Date	The date on which the Withholding funds will be debited from the employer account. The credit to the SDU will then be sent to the SDU 2-3 business days after the Debit Effective date. A payment must be submitted at least one business day before the Effective Date but may be changed by the employer to a date up to 30 days in the future if desired.

FIPS Code	A standard code number for identifying counties in each state. A table is provided on the web site if you need to look up the county FIPS code for an employee's case. Many states have a State FIPS and therefore the individual counties will not be listed.
SDU	State disbursement unit - the state organization responsible for receiving and disbursing child support payments.
Primary User	The person who originally registered your company on ExpertPay. The primary user has all privileges on the site, and can create other users within the company who may have the same or fewer privileges on ExpertPay, except that only the Primary User can create other users. To change a Primary User, the employer must contact ExpertPay customer service.
PIN	Personal identification number - employees may have a PIN assigned to their case in addition to a case ID. However, in the Wage Attachment Order, if the posting information references PIN, then that is what is entered for State Identification Number
Withholding Amount	The money deducted from an employee's wages or salary for court ordered child support.
Payment Group	A permanent list that you create to store payment information for a group of your employees who are subject to withholding orders.

## **Exploring the System**

## Screen Format

ExpertPay is best viewed when your Internet browser window is maximized so that all parts of the screen can be seen. If the window is not maximized, click on the maximize button, which is the middle of the three buttons in the upper right corner of the Internet browser application window. The standard ExpertPay window contains normal Internet browser features such as the menu bar, toolbar, and the location text box.

ExpertPay <sup>®</sup>	Employers			Welcome, Jahier Cordova 🔻
Payment Methods	Payment Group	Payment Center	Payment History	
Payment Center				

The Menu bar is located on the top of the screen. It lists all the ExpertPay functions that can be accessed once a user is signed in.

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The links are listed at the bottom of the screen. These are available to ALL users that navigate to the website with or without registration. Clicking on one the links will transfer control to one of the functions listed, such as Privacy Statement, Legal Notices and Terms of Use, Online Security, Help, Fees, and Contact Us. You can also toggle the screen back and forth from English to Spanish.

The Work Area is located in the center of the screen. This is where the processing information is entered and displayed.

## How to access ExpertPay functions

Clicking on any one of the Menu bar functions will cause the appropriate function screen to be displayed.

## **Getting Started**

In order to use ExpertPay you will need to set-up your user id, your bank account, and Payment Groups. Directions on how to complete these steps appear in the rest of the ExpertPay Help.

#### How to get started

- 1. Register to use ExpertPay, and create a user id.
- 2. Receive a system generated password via email upon completing the registration process.
- 3. Sign-in with your user id and password. It is recommended you copy and paste your password into the password field.
- 4. Change system generated password to a personal password.
- 5. Add Payment Method.
- 6. Verify bank account. See topic under Bank Accounts
- 7. Create a Payment Group. See topic under Payment Groups.
- 8. Add employee case(s) to a Payment Group. See topic under Payment Groups.
- 9. Prepare a payment using a payment group. See topic under Payment Center.
- 10. Submit a payment. See topic under Payment Center.

#### Register

In order to use ExpertPay, the primary user from your company must register. The primary user is the person in your organization who determines whether other employees may have access to your data at this web site. The primary user also assigns privileges (view data only or update data) to those employees. After the primary user has registered the company in ExpertPay, the user id, password, and ExpertPay account number will be emailed to him/her.

## How to Register

- 1. Open your Internet browser.
- Enter the address www.expertpay.com and press Go. (For easy access, store this as a Bookmark or Favorite in your Internet browser.)

America's <b>#1</b> Child Support Payments Pla	tform by CONDUENT 🝌
)one.	
er, easier, upport Lower costs.	
Payroll Service Providers	Parent Paying Support
Reduce back-office backlogs and eliminate manual process time and costs.	Make child support payments with just the click of a mouse.
GET STARTED	GET STARTED
GET STARTED	GET STARTED
	America's #1 Child Support Payments Pla Donne. ter, easier, upport Lower costs. Payroll Service Providers Reduce back-office backlogs and eliminate manual process time and costs. GET STARTED

## 3. Select ExpertPay for Employers

Employers

ExpertPay

New User? Register Now.	Login	
With ExpertPay <sup>s</sup> , you have a quicker, easier way of making child support payments. On the secure ExpertPay <sup>s</sup> website, you can:	User ID	
<ul> <li>Save and maintain employer information as well as employee withholding information for quick payments</li> </ul>	naylamunoz	
<ul> <li>Add multiple users to the account, and individually define each user's authorization</li> <li>Please note different fees and service charges may apply</li> <li>Register now</li> </ul>	Password  Log in <u>Forgot Your Password?</u> New User? <u>Register now ≥</u>	
(III) VISA DECOVER RECOVER	PayPal	

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- 4. Click on **Register Now** or **New User?** <u>Register Now ></u> to register and create an account.
- 5. Enter the following employer information.
  - a. FEIN (nine digit federal employee ID number **no alpha characters**)
  - b. Employer name
  - c. Address
  - d. City
  - e. State
  - f. Zip code
  - g. Click Save and Continue

ExpertPay	v°	Employers
Expertise,	,	Linployers

Register with ExpertPay®		
1 Employer Information	2 User Information	3 Finish Setup
Employer Information (Step 1 of 3)		
FEIN *	(9-Digit Federal Employer ID Number)	The registration process consists of 3 easy steps. For Step1 simply complete the online form below with your company information. For Step 2, please enter registration information Eor Step 3, work your registration information
Employer Name *		the information is correct, accept the ExpertPay <sup>®</sup> Terms of Service and click AGREE & SUBMIT button. If you need to
Address *		change this information, click the Edit button. There will be a \$2.50 registration fee. <u>Why this fee?</u>
City *	State *	
	Select State 🗸	
Zip *	Zip Ext	
Cancel Clear Form Save and Continue	1	

- 6. Enter the following primary user information.
  - a. Primary user name (first and last name)
  - b. Phone number
  - c. User id (at least six characters)
  - d. Email address
  - e. Click Save and Continue

ExpertPay <sup>*</sup> Employers		
Register with ExpertPay*		
1 Employer Information	2 User Information	3 Finish Setup
Create Account (Step 2 of 3)		
User Name (First - Last) *		The primary user is the person in your organization who determines whether other employees may have access to your data at this web site. The primary user also assigns privileges
Phone * Ext		(view data only or update data) to those employees User ID at least 6 characters
User ID (At least 6 characters) *		
Email *		
someone@company.com		
Back Clear Form Sive and Continue		

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- 7. Verify that the information entered is correct.
  - If the information is **not** correct, click **Back** and update the information.

Employer Information	2 User Information	3 Finish Setup
ish Setup (Step 3 of 3)		
Employer Information		Please verify your registration. If the information is correct, print a copy for your record. If you need to change this information, click Edit button below. After confirming and origine your information. Read
FEIN	874521231	carefully the Terms and Conditions. Click the AGREE & SUBMIT button
Employer Name	Employer Test Name	to finish setup.
Address	124 Any st	
City	Any Town	
State	IL.	
Zip	66025	
Edit		
Primary User		
Jser ID	TestUser123	
Phone	8546798561	
Email	Testemail@test.com	
Edit		
teptance of Terms of Service		
te Last Revised: June 25, 2019		
ring the ExpertPay⊗ registration process.	you must agree to the following Terms of Service. Your use	of ExpertPay® to make online payments on your behalf signifies
ntinued acceptance of these Terms of Ser ur ExpertPav® access.	vice. If you do not agree, you may contact ExpertPay⊗ Custo	omer Service to have your registration cancelled, which will terminate
ms of Service Controlling Your Use of Exp	pertPay®	
e following Terms of Service (TOS) concer	n your use of ExpertPay® (ExpertPay®), and agreement with	n, Conduent State & Local Solutions, Inc. By accessing this site, you
nave read and accept the Terms of Servic	.e*	

- 8. Review the Terms and Conditions.
  - a. Check the Box, I have read and accept the Terms of Service\*
  - b. Click Agree and Submit, your password will be sent to you via email.

## LogIn

Each time you access ExpertPay, you will need to login.

## How to login

- 1. Open your Internet browser.
- Enter the address www.expertpay.com and press Go. (For easy access, store this as a Bookmark or Favorite in your Internet browser.)

With ExpertPay*, you have a quicker, easier way of making child support payments. On the secure ExpertPay* website, you can: <ul> <li>Save and maintain employer information as well as employee withholding information for quick payments</li> <li>Add multiple users to the account, and individually define each user's authorization</li> <li>Please note different fees and service charges may apply</li> <li>Register now</li> <li>Forgot Your Password?</li> <li>New Lier? Begister now &gt;</li> </ul>	New User? Register Now.	Login
Herroset, <u>Report Horr</u>	<ul> <li>With ExpertPay<sup>®</sup>, you have a quicker, easier way of making child support payments. On the secure ExpertPay<sup>®</sup> website, you can:</li> <li>Save and maintain employer information as well as employee withholding information for quick payments</li> <li>Add multiple users to the account, and individually define each user's authorization</li> <li>Please note different fees and service charges may apply</li> </ul>	User ID Password Log in Forgot Your Password? New User? Register now >

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- 3. Type in your user ID and password. (The userID is created upon registration, the password is system generated and emailed to registered email account.) It is recommended you copy and paste your password into the password field. (All passwords are of the following format: 7 letters upper and lower case and 1 numeric and 1 special character (total of 9 characters). All passwords are case sensitive. If you don't have your user ID and Password, contact ExpertPay customer service.
- 4. Click Login

#### Forget your password?

- 1. Click on the Forgot your password? link
- 2. Enter your user id.
- 3. Click Submit.

The system will reset your password and the new password will be emailed to your registered email account.

ExpertPay*	Employers	
Please enter your User ID sent to your registered en	and click SUBMIT button. A new password will be nail.	Password Recovery
For Torgot User ID, please	call customer service.	User ID * Cancel Submit
<u>Privacy Statement</u> <u>Legal Not</u> Languages <u>english</u> español	ices and Terms of Use Online Security Help Fees	Contact Us 1-800-403-0879   <u>customer.service@expertpay.com</u> 8:00 am to 8:00 pm Eastern Time
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If you forgot your user id, click on **Customer.Service@expertpay.com.** This link will direct you to email the customer service group.

## **Change Password**

You should change your password regularly to ensure that the information in ExpertPay is secure.

ExpertPay <sup>®</sup>	Employers			Welcome, Liz Liz 🔻
Payment Methods	Payment Group	Payment Center	Payment History	
Change Password				
New Password * Confirm New Password * Cancel Confirm to ch	ange			Please create a new password, then confirm the new password by entering it again. Click Confirm to change and save your new password. Note: The new password must conform to the following: • It must contain at least one upper and one lower case alpha character and at least one numeric or special character • It must be 8-12 characters in length. • It must be different from the previous 6 passwords. • It may not contain part of the user id, or be a personal name Required fields are marked with a red asterisk (*).
Privacy Statement Legal Not	ices and Terms of Use	Online Security Help Fee	s <u>Contact Us</u>	1-800-403-0879   <u>customer.service@expertpay.com</u>
anguages <u>english</u> <u>español</u>				8:00 am to 8:00 pm Eastern Time

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#### How to change your password

- 1. Click **Change Password** on the menu dropdown upper right hand corner.
- 2. Enter your new password in the New password field.
- 3. Enter your new password again in the Confirm New password field to confirm it.
- 4. Click Confirm to Change to save your new password.

Your password must be ...

• Between eight and twelve alphanumeric characters.

- Must include at least one upper and one lower case alpha character
- Contain at least one numeric digit or special character
- It must be different from the previous 6 passwords 
   It may not contain part of the user id or be a personal name 
   Exact as they are case sensitive.

## Log out

You can log out of ExpertPay at any time.

## How to log out of ExpertPay

1. Click on Log Out on the drop-down bar at the top right of the screen.

Payment Methods	Payment Group	Payment Center	Payment History		Eult Primary Use
Payment Method	s				Manage Users
-,	-				Change Password
	والمراجع			· · · · · · · · · · · · · · · · · · ·	

## **Using the System**

## **Payment Center**

The Payment Center screen is the first screen that is displayed when you login to ExpertPay.

#### How to access the payment center screen

1. Click **Payment Center** on the menu bar on the top of the screen.

The Payment Center screen contains the following information. 1. Pending Payment List

#### Status definitions

- 1. **Submitted** indicates that the payment has been submitted from the employer's bank account to ExpertPay but has not been accessed by an ExpertPay processing program which runs at night.
- 2. **Not Submitted** indicates that a payment has been created by the employer, but it has not been submitted yet.

#### List of NOT pending status'

- 3. **In Progress** indicates that the ExpertPay processing program, that runs at night, has accessed the payment that has been submitted. This ExpertPay program changes the status of the payment from Submitted to In progress at this time.
- 4. **Batch in Progress** indicates that the ExpertPay processing program, that runs at night, is processing the payment.
- 5. **Paid** indicates that a finance person in ExpertPay administration, has approved the money to be deposited into the SDU account. This occurs sometime after the ExpertPay processing program, that runs at night, has completed.
- Cancelled by User indicates that the employer has cancelled a payment that has been prepared. This can be done by clicking on the C button on the line of a prepared payment entry on the payment center screen.
- 7. **Cancelled by System** indicates an issue with your current bank account. Contact ExpertPay customer service.

## **Payment Methods**

From the Payment Methods screen, you will be able to choose the payment method that works the best for you.



## **Bank Account:**

#### Add New Bank Account

The **Payment Methods** screen lists the account(s) that is/are used to contain the withholding funds that will later be transmitted by the employer to the State Disbursement Unit (SDU) via ExpertPay. This screen lists the Payment Methods that the employer has added. Following is a description of the fields contained in the bank account list.

Field Name	Field Description
Routing transit number	This is a nine character number. It can only contain numeric digits. ExpertPay validates the routing transit number against the bank's name.
Bank Name	This name is pulled from the updated Federal Reserve Thompson Table when routing transit number is added.
Account number	This field contains the bank account number.
Account type	This field indicates if it is a checking or savings account.
Default ;account (star)	The default account is the account from which payment to the SDU is made if an account number is not specified with the payment
Status	This reflects the current bank account status (only active accounts can be used to submit payments)

## How to create a bank account

1. Click on **Payment Method** on the menu bar at the top of the screen.

ExpertPay	Employers				Welcome,	Expert Pa
Payment Methods	Payment Group	Payment Cente	er Payment Hist	ory		
Payment Metho	ds					
Below is a list of your a method please select t	available payment metho the appropriate icon usir	ods. To add a payment n ng the provided legend.	nethod please select fro	m the choices below. To	edit, delete or verify a pa	ayment
Global Bank Account 2-4 Days for processing Fees vary by state	Credit Card 2-4 Days to arrive at SDU Fees vary by state	PayPal 2-4 Days to arrive at SDU Fees vary by state	Venmo 2-4 Days to arrive at SDU Fees vary by state	G Pay Google Pay 2-4 Days to arrive at SDU Fees vary by state	4 Pay Apple Pay 2-4 Days to arrive at SDU Fees vary by state	

2. To add a new account, click on the **Pay By Bank** button that is located right above the box that contains the list of bank accounts.

<b>ExpertPay</b> <sup>®</sup>	Employers			Welcome, Jahier Cordova 🔻
Payment Methods	Payment Group	Payment Center	Payment History	
Add Bank Account	:			
• Employers using ACH with Company ID 11319	l Positive Pay or Debit Blo <b>996647.</b> If you do not utili	ocks must notify their ban ze Debit Blocks or ACH Po	k or modify their bank acco sitive Pay services, this act	ount settings to accept ACH debits from ExpertPay ion is not required.
Routing Transit Number Account Number * Account Type *	<b>0</b> *		]	For add new bank account. In order to verify that you are authorized user of this account, a transaction will be sent to this bank account tonight. Once you see the transaction in your bank account, you will have 3 business days to log in to ExpertPay <sup>1</sup> and verify the transaction information. Once this has been successfully completed, you will have the ability to
Checking		~	]	submit your child support payments through ExpertPay <sup>®</sup> using this bank account. All new bank accounts must complete this exercise. There are no exceptions. Required fields are marked with a red asterisk ( *).
Cancel Save and C	Complete			

- 3. Complete the following information.
  - a. Routing transit number (must be an ABA participating institution).
  - b. Bank account number.
  - c. Select the type of account by clicking on the <down arrow> next to the Account type box and then clicking on the type of account (checking, savings).
  - d. Click on the check box below Account Type to make this the default account (if desired).
- 4. Click Save and Complete.
- 5. The Bank account information screen is displayed. It lists all the accounts including the account that you just added.

## **Edit Bank Account**

There may be a time when you want to edit bank account information. As an example, you may want to make a particular account your default account.

#### How to edit a bank account

1. Click on Payment Methods on the menu bar on the top of the screen.

ExpertPay®	Employers			Welcome, Jahier Cordova 🔻		
Payment Methods	Payment Group	Payment Center	Payment History			
Payment Methods						
Below is a list of your ava method please select the	Below is a list of your available payment methods. To add a payment method please select from the choices below. To edit, delete or verify a payment					

2. Click on "pencil" edit button on the account you wish to modify.

Action	
/ ×	

- 3. Enter the information that needs to be changed.
  - a. Routing transit number.
  - b. Bank account number.
  - c. Select the type of account by clicking on the <down arrow> next to the Account type box and then clicking on the type of account (checking, savings).
- 4. Click Save Changes.
- 5. A verification screen is displayed.
- 6. Click Complete

\*Please note: all new or edited bank accounts will need to go through the bank verification process.

## **Delete Bank Account**

You may want to delete an account from ExpertPay® at some time. Please note you will not be able to delete a bank account if there are payments and/or profiles associated with it.

#### How to delete a bank account

- 1. Click on **Payment Methods** on the menu bar at the top of the screen.
- 2. Click on the "X" button under the **Action** column for the account you wish to delete.
- 3. The system will ask for you to confirm you wish to deactivate the enclosed account.
- 4. The entry is deleted. The bank account list no longer contains an entry for that bank account.

NOTE: The bank account may only be deleted/deactivated if there are no payments or profiles associated with this account.



## **Bank Account Verification**

All new or edited bank accounts (where the routing transit and/or account number has been changed) must go through Account Verification. This process sends a transaction amount to the bank account added to the system. When user can see this transaction in the bank account, they must sign back into the ExpertPay system to verify the amount of that transaction.

Navigate to the bank account list by clicking Payment Methods from the menu bar.

Select verify to go the Bank Account Validation screen where you need to enter the transaction amount we deposited into your bank.

-	Welcome los	總
	Bank Account Validation	
	To validate this bank account please enter the amount that was deposited to it.          Deposit Amount: (\$) :         Cancel         Continue	

Click on the continue after entering the amount in the following format: .##

You are given three chances to enter the correct amount before your account is deactivated. You will then be asked to contact Customer Service.

When you successfully validate the transaction amount your bank account will be activated and you will be able to submit payments with it.

## Add Credit Card Account

#### How to add a credit card account

From the Payment Methods screen, select Pay By CreditCard

The following screen will display:

Add Credit Card	Do not close the window / browser / click on Back l	button while request is processing
* Denotes a required field		
Credit Card Informa	ition	
Account Name*		
Credit Cards Accepted		
Expiration Date*		
Oct • 2019 •		
Card Security Code*		

- 1. Enter the credit card information and the billing information for the credit card.
- 2. Click Save Changes

Payment Method		Х
	Card details have been added successfully.	
	ок	

**Edit Credit Card Account** 

There may be a time when you want to edit credit card account information.

## How to edit a credit card account if the billing/address information changes

- 1. Click on **Payment Methods** on the menu bar at the top of the screen.
- 2. Click on the row in the list that has the credit card account you wish to modify.
- 3. Select EDIT.
- 4. Enter the information that needs to be changed.
- 5. Click Save Changes.
- 6. A verification screen is displayed.
- 7. Click **OK** to complete.

## **Delete Credit Card Account**

You may want to delete a Credit Card account from ExpertPay® at some time.

Delete Account		$\times$		
This action will DELETE the account, do you want to delete this account?				
Brand Name	Visa 1			
Account Number	xxxxxxxxxx1111			
Account Type	CREDITCARD			
Cancel Delete				

#### How to delete a Credit Card account

- 1. Click on **Payment Methods** on the menu bar at the top of the screen.
- 2. Click on the row that has the account you wish to delete to select it.
- 3. Select **Delete** button.
- 4. The system will ask for you to confirm you wish to deactivate the credit card account.
- 5. The entry is deleted. The Payment Methods list no longer contains an entry for that credit card account. *NOTE: The credit card account may only be deleted/deactivated if there are no pending payments or profiles associated with this account.*

Remove Account	X
You cannot delete this payment method because either payments or account verification are associated with it. Remove it after all payment processing is completed.	
ок	

## Add PayPal Account

## How to add a PayPal account

From the Payment Methods screen, select PayPal

The following screen will display:

	Pay with PayPal
Wit	h a PayPal account, you're eligible for Purchase Protection and Rewards.
Email	or mobile number
Passv	vord
orgot	password?
	Log In
	or
	Create an Account

- 1. Enter your PayPal login information (email), or Create an Account with PayPal.
- 2. Enter your PayPal password
- 3. Click Log In



- 4. Choose which account you want to use from your PayPal virtual wallet.
- 5. Click Continue



- 6. Read the terms and conditions.
- 7. Click **Agree and Continue** if you agree to the terms and wish to add PayPal as a Payment Method for your ExpertPay account.

ExpertPay	Employers				Welcome, Expert Pay 🔻
Payment Methods	Payment Group	Payment Cente	er Payment Hist	ory	
Payment Method	ls				
Below is a list of your av method please select th	vailable payment metho ne appropriate icon usir	ods. To add a payment n ng the provided legend.	nethod please select fro	m the choices below. To	edit, delete or verify a payment
Eank Account 24 Days for processing Fees vary by state	Credit Card 2-4 Days to arrive at SDU Fees vary by state	PayPal 2-4 Days to arrive at SDU Fees vary by state	<b>Venmo</b> 2-4 Days to arrive at SDU Fees vary by state	G Pay Google Pay 2-4 Days to arrive at SDU Fees vary by state	
+ Add New	+ Add New	PayPal	+ Add New	@ Link	
		*Le	egends : 🔍 View 💉 Edit	🗙 Delete   🖉 Verify A	ccount   🔳 Verify NOC   🍾 Contact Us
Account 🗢		Statu	IS 🗘 Payment	Methods <b>V</b>	Action
🗇 emp.pp1@cond	.com PAYPAL	Activ	e PAYPAL		● 🖍 🗙

8. Your PayPal account will now display as a Payment Method option for you to make a payment.

## Edit PayPal Account

There may be a time when you want to edit your PayPal account information in ExpertPay.

## How to edit a PayPal account

1. You must log directly into PayPal to edit your PayPal account information and preferences: https://www.paypal.com



## **Delete PayPal Account**

You may want to delete your PayPal account from ExpertPay® at some time.

#### How to delete a PayPal account

- 1. Click on **Payment Methods** on the menu bar at the top of the screen.
- 2. Click on the row that has the account you wish to delete to select it.
- 3. Select Delete button
- 4. The system will ask you to confirm you wish to deactivate the enclosed account.

Delete Account		X
This action will DELETE the	account, do you want to delete this account?	,
Account	emp.pp1@cond.com	
Account Type	PAYPAL	
Cancel Delete		
000000000000000000000000000000000000000		

5. The entry is deleted. The PayPal account list no longer contains an entry for that PayPal account.

NOTE: The PayPal account may only be deleted/deactivated if there are no payments or profiles associated with this account.

Remove Account	Х
(!)	
You cannot delete this account because a Payment Group is using it. Remove it from the Payment Group and then delete OK	

## Add Venmo Account

#### How to add a Venmo account

From the Payment Methods screen, select + Add New under the Venmo logo.

The following screen will display:

😄 id.venmo.com/signin?country.x=US&locale.x=en& 🐼	😆 id.venmo.com/signin?country.x=US&locale.x=en& 🔯
	Change
venmo	
Log in	venmo
Enter email or username	Log in quickly with a one-time code
Next	Mobile number (4XX) XXX-8493
	By tapping Get a code, you confirm that you are authorized to use the number entered and agree to receive SMS texts to verify you own the number. Carrier fees may apply.
	Get a code

Log in with password instead

- 1. Enter the email registered with your Venmo account.
- 2. Following you will be asked if you prefer to login with a security code or your password.

## **Edit Venmo Account**

There may be a time when you want to edit your Venmo account information in ExpertPay.

#### How to edit a Venmo account

1. You must log directly into Venmo to edit your Venmo account information and preferences.



## **Delete Venmo Account**

You may want to delete your Venmo account from ExpertPay® at some time.

#### How to delete a Venmo account

- 1. Click on **Payment Methods** on the menu bar at the top of the screen.
- 2. Click on the row that has the account you wish to delete to select it.
- 3. Select **Delete** button
- 4. The system will ask you to confirm you wish to deactivate the enclosed account.

Delete Account		$\times$
This action will DELETE the a	account, do you want to delete this account?	
Account	ryc@gmail.com	
Account Type	VENMO	
Cancel Delete		

5. The entry is deleted. The Payment methods list no longer contains an entry for that Venmo account.

NOTE: The Venmo account may only be deleted/deactivated if there are no payments or profiles associated with this account.



## Add Google Pay Account

#### How to add a Google Pay account

From the Payment Methods screen, select Link under the Google Pay logo.

The following screen will display:

Payment Method	х
ExpertPay <sup>®</sup> GPay	
Agree Cancel	

- 1. You will be asked if you would like to connect Expertpay with Google pay to make future payments.
- 2. Click Agree.
- 3. Your Google Pay account will be connected to your Expertpay account.

Payment Method	Х
Your Google Pay account has been connected	
ОК	

## **Edit Google Pay Account**

There may be a time when you want to edit your Google Pay account information in ExpertPay.

#### How to edit a Google Pay account

1. You must log directly into Google Pay to edit your Google Pay account information and preferences.

## **Delete Google Pay Account**

You may want to delete your Google Pay account from ExpertPay® at some time.

#### How to delete a Google Pay account

- 1. Click on Payment Methods on the menu bar at the top of the screen.
- 2. Click on the row that has the account you wish to delete to select it.
- 3. Select **Delete** button
- 4. The system will ask you to confirm you wish to unlink Google Pay account.

Unlink Account	x
ExpertPay <sup>®</sup> · 🗙 · GPay	
Are you sure you want to unlink Google Pay?	
Yes No	

5. The entry is deleted. The Payment methods list no longer contains an entry for that Google Pay account.

NOTE: The Google Pay account may only be deleted/deactivated if there are no payments or profiles associated with this account.

Remove Account	Х
You cannot delete this account because a Payment Group is using it. Remove it from the Payment Group and then delete	
ок	

## Add Apple Pay Account

#### How to add an Apple Pay account

From the Payment Methods screen, select Link under the Apple Pay logo.

The following screen will display:

ePay
le Pay to make future payments
Cancel
P

- 4. You will be asked if you would like to connect Expertpay with Apple Pay to make future payments.
- 5. Click Agree.
- 6. Your Apple Pay account will be connected to your Expertpay account.



## **Edit Apple Pay Account**

There may be a time when you want to edit your Apple Pay account information in ExpertPay.

## How to edit a Apple Pay account

1. You must log directly into Apple Pay to edit your Apple Pay account information and preferences.

## **Delete Apple Pay Account**

You may want to delete your Apple Pay account from ExpertPay® at some time.

#### How to delete a Apple Pay account

- 6. Click on Payment Methods on the menu bar at the top of the screen.
- 7. Click on the row that has the account you wish to delete to select it.
- 8. Select **Delete** button
- 9. The system will ask you to confirm you wish to unlink Apple Pay account.

Unlink Account	x
ExpertPay* 🔀 🖨 Ay	
Are you sure you want to unlink Apple Pay?	
Yes No	

10. The entry is deleted. The Payment methods list no longer contains an entry for that Apple Pay account.

NOTE: The Apple Pay account may only be deleted/deactivated if there are no payments or profiles associated with this account.

Remove Account	Х
You cannot delete this account because a Payment Group is using it. Remove it from the Payment Group and then delete	
ок	

## **Payment Groups:**

## **Payment Group Overview**

Payment Groups are used to create and submit employee case payments on a regular basis. It is a list that you create to store payment information for a group of your employees who are subject to withholding orders. You can have as many groups as you want. Examples of possible payment group names are weekly, monthly, or salaried, eastern division, western division or whatever name you want to give the group.

There are two methods to create a Payment Group with ExpertPay.

**Method # 1: Create a Payment Group** - by logging into the ExpertPay website, creating a group, and manually inputting the case information for each employee. This is a list that you create to store payment information for a group of your employees who are subject to withholding orders.

**Method #2: Create a Payment Group by uploading a file**. This service can save valuable time, as your employees' electronic payment information is sent directly to the secure ExpertPay website. You do not have to type in each employee's withholding data for each payment. Employers who make repeat payments for a large number of employees, will find that the Payment Group Upload function will help improve the overall payment process. This process requires less employer time inputting employee data for federally mandated child support withholdings.

## Add a Payment Group

Payment Groups are used to create and submit employee case payments on a regular basis. It is a permanent list that you create to store payment information for a group of your employees who are subject to withholding orders. You can have as many groups as you want. Examples of possible group names could be weekly, monthly, salaried, or whatever name you want to give the group. Following is a description of the fields contained in the Payment Group list.

Field Name	Field Description
Group Name	This is the name of the profile that you selected.
Payment Method	Payment method information.
Number of Employees	The number of employees who are attached to this profile.
Total Payment Group Amount	The total number of withholdings within the profile
X for Deletion	This X must be checked when deleting a profile.

## How to manually create a Payment Group

- 1. Click **Payment Group** on the menu bar.
- 2. Click Add profile box.

Search for Profile		Search	Add Profile	Upload Profile *Legends : ¥ De
Search for Profile		Search	Add Profile	Upload Profile
Below is a list of you on Profile name to y	r withholding payment grou iew and/or edit the details o	ips. Payment groups are us of payment group.	sed to create and submit	t employee withholding payments on a regular basis. Cl
Payment Grou	р			
Payment Method	s Payment Group	Payment Center	Payment History	

3. Type in the name of the profile in the box next to Payment Group name.

#### 4. Select the Payment Method.

- a. Click on the down-arrow to the right of the box.
- b. Click on the desired payment method.

## 5. Click Add Employee.

ExpertPay	Emp	loyers				Welcome, Jahier Cordova
ayment Methods	Payme	nt Group	Payment Center	Payment History		
dd Profile						
Payment Group Nar	ne:		Payment Group Nam	e		
Select Payment Met	hod:		Select Payment Opti	on	~	
Number of Employe	es Applied:	0	0			
Payment Amount:			\$0.00			
-						
mployee List						
Search for Employee		Search	Add Employee			
Employee Name 🖨	SSN 🖨	State 🗢	State Identification Nu	mber \$ FIPS \$	Withholding Amount 🖨	Includes Medical 🖨
			No	Record Found		

	6. Enter Employee Withholding information		
Expe	rtPay <sup>®</sup> Employers	Velcome, Jahie	er Cordova 🔻
Payment	Add Employee	$\times$	
Add Pro	First Name: Last Name:		
Bayes	Asserisk (*) indicates a required field.		
Faying	9-Digit Social Security Number:		
Select	State Where Payment is Sent:		
Numb	Select State 🗸		
Payme	FIPS: 0		
	State Identification Number:		
Employe	•		
Search	Withholding Amount (\$):		
Employ	•	N	ledical 🗢
	Includes Medical: ves  no		
Ca	Employment		
Privacy Statem		6	expertpay.com
Languages <u>en</u>		2	m Eastern Time

. . . . . . . .

. .

\_

- 7. Once all the information is entered you will need to click Save and Add Employee.
- 8. When you back to the Payment Group screen you will need to click Save and Complete.

## How to create a Payment Group for receipt and disbursement fee (R&D fee).

Expertpay suggests creating a separate Payment Group to be use for R&D exclusively, this is because the receipt and disbursement fee (R&D fee) cannot be combined with regular child support payments. Please use the following steps to create a payment group for R&D fee. Please use the following steps to create a Payment group for R&D fee.

- 1. Click **Payment Group** on the menu bar.
- 2. Click Add profile button.
- 3. Type in the name of the profile in the box next to Payment Group name.
- 4. Select the **Payment Method.** 
  - a. Click on the down-arrow to the right of the box.
  - b. Click on the desired payment method.
- 5. Click Add Employee.
- 6. Enter Employee Withholding information.

If the user selects Wisconsin as the state for the payment, they must choose whether the payment is for current support or an R&D Payment. Upon selecting R&D, a warning popup will notify the user that they have opted to make a receipt and disbursement fee (R&D fee) payment. The system will then automatically set R&D Payment as the FIPS and apply a \$65.00 withholding amount.

#### State Where Payment is Sent:

Wisconsin		~
O Current Support	R&D Payment	
FIPS:	Ø	
R&D Payment		*
State Identification No	umber:	0
Withholding Amount	(\$):	

65

## WI R&D Payment Information

You have selected to make a receipt and disbursement fee (R&D fee) payment. Please note the R&D fee payment will be applied ONLY to the receipt and disbursement fee, it will NOT be used to pay child support. Please select ONE TIME as the payment frequency when making a payment. Please contact WI R&D customer service line at 414-615-2585 for any questions.



7. Once all the information is entered you will need to click Save and Add Employee.

8. When you back to the Payment Group screen you will need to click Save and Complete.

Employee Name 🗢	SSN 🗢	State 🖨	State Identification Number 🗢	FIPS 🗢	Withholding Amount 🗢	Includes Medical 🖨	
<u>R&amp;D, WISCONSING</u>	XXX-XX-345	WI	7845210	R&D Payment	\$65.00	no	
Cancel	Save and Cor	nplete					

## Edit Payment Group

You may view and edit the details of a group by clicking on the profile name in the list of the profile you wish to edit. You may want to change the name or the bank account for this group.

#### How to edit a Payment Group

- 1. Click **Payment Groups** on the menu bar on the left side of the screen.
- 2. Click on the profile name of the group you wish to edit.
- 3. You may also edit employee information in the employee list by clicking on the employee you wish to edit.

## **Delete Payment Group**

A Payment Group may be deleted from the Payment Group list screen.

#### How to delete a Payment Group

- 1. Click **Payment Groups** on the menu bar on the left side of the screen.
- 2. Click red X to **Delete.**
- 3. Click confirm to Delete the entire group and the entire employee list

## Add Employee Case to a Payment Group

Employees need to be associated with a Payment Group. This function is accomplished by adding personal employee information including name, SSN, State Identification Number and state to which the withholding will be sent.

#### How to add an employee case to a Payment Group

- 1. Click Payment Groups on the menu bar on the left of the screen.
- 2. Select the group you wish to Edit by clicking on the profile name.
- 3. Click Add employee in the Employee List box.

Expe	rtPay <sup>®</sup> Employers weich	ome, Jahi	ier Cordova 🔻
Paymen	Add Employee	$\times$	
Add Pro	First Name: Last Name: Add or edit employee information on this form.		
Payme	-Sterisk (* ) indicates a required help. 9-Digit Sodal Security Number:		
Select	· ·		
Numb	State Where Payment is Sent: Select State		
Payme	FIPS: 0		
	Select Fips V		
Employe			
Search	Withholding Amount (\$):		
Employ	· ·		/edical 🗢
	Includes Medical: ○ yes		
a	Employment Check here if employee is no longer employed		
Privacy Statem	Save and Add Employee		Bexpertpay.com

- 4. Enter / select the appropriate information for the employee:
  - a. First and last name
  - b. Social security number
  - c. State (This may or may not be the State where the employee resides this state agency is WHERE the withholding payment should be sent)

Click the **down arrow** next to the state box to see the list of states and then select the appropriate state.

- d. Select the FIPS code associated with the withholding
- e. Refer to wage attachment court order to obtain State Identification Number/Case Number.
- f. Withholding amount
- g. Includes medical
  - Note: This check box indicates if the employee has medical insurance coverage.
- h. Check Employment if the employee is no longer employed.
- 5. Click Save and Add Employee.

## Edit Employee Case in a Payment Group

You may view and edit an Employee Case within a Payment Group at any time.

#### How to edit an employee case

- 1. Click **Payment Groups** on the menu bar.
- 2. Check the profile name of the group you wish to edit to select it.
- 3. Click on the employee name of the employee you wish to edit
- 4. Click Edit
- 5. Edit the appropriate information.
- 6. Click Save and Complete.

## **Delete Employee Case from a Payment Group**

Employee case information can be deleted when appropriate.

**Note:** Delete Employees if the record was entered in error OR you have indicated in the past that the employee is terminated and how you want to take the employee out of the profile. This would normally be done after the final payment for an employee has been submitted.

## How to delete employee case from a Payment Group

- 1. Click on red X next to the employee you wish to delete
- 2. Confirm **Delete** button in pop up. This causes the employee case to be deleted.

## Creating Profiles with an upload

## Profile Upload Overview

The Profile Upload functionality in ExpertPay allows employers to electronically upload the Payment Group into ExpertPay. This function can save valuable time, as your employees' child support withholding information is uploaded directly to the secure ExpertPay website. Employers who make repeat payments for a large numbers of employees will find this function improves the overall payment process.

#### Prerequisites:

Before you can upload a Payment Group file, you must have an ACTIVE DEFAULT bank account, and make sure the Payment Group file is in the correct format (fixed length or CSV format). If you have multiple bank accounts, you will have to ensure one of them is selected as the default account. This is the account that will be linked to your uploaded profile. <u>Click here</u> for information on setting up a bank account and selecting a default account.

<u>Click here</u> for information on file formatting.

## How to import a Payment Group file:

- 1. Create the Payment Group file.
- 2. Log on to the ExpertPay site.
- 3. ExpertPay will display the Upload Profile on Payment Group and Payment Center pages.
- 4. Click on Upload Profile.
- 5. ExpertPay will display the "Upload Payment Group Detail" page with upload file process information, and controls used to upload the file.
- 6. Click on the "Browse" button.
- 7. ExpertPay will display a dialog box that allows you to browse your local machine for the file to be uploaded.
- 8. Use the file browsing window to find and select the file to be uploaded, and click on the "Open" button.

- 9. ExpertPay will display the path to the file being uploaded in the field next to the "Browse" button.
- 10. Click on the "Upload" button.
- 11. ExpertPay will start the upload process. When it is completed, the system will perform a preliminary review of the file. (Is it correctly formatted?)
  - If the file passes the review, ExpertPay will display a "Successful upload" message.
  - If the file fails the review, ExpertPay will display an upload error message. The upload controls will remain visible on the screen so you can select and upload a different file.
- 12. Once you have successfully uploaded a Payment Group file, you will receive an email indicating the upload was successful. The confirmation message will include the following information:
  - Profile name
  - Number of detail withholding
  - Total amount

You may now select that profile to create your payment.

#### Formatting the Payment Group Files

In order to successfully import a Payment Group file, the file must be in the correct format (Fixed length or CSV format). The tables below illustrate the structure and record layout of the Payment Group. At the bottom of each table is an example of records for that format within a Payment Group.

#### Fixed length format - Payment Group file:

I D	Po sit io n	Element Name	Contents/ Notes.	Type A=AI pha nume ric N=Nu meri c	Le ng t h	MOC M=man dator y O=opti onal C=con dition al			
File He	ader Record	Í							
1	01	Reco	Equals "H"	А	1	М			
	-	rd	for the File						
	01	Туре	Header						
			Record.						
2	2-	Profil	The name	А	50	Μ			
	50	е	of the						
		Nam	profile to						
		е	create.						
Detail I	Detail Record								
1	1	Reco	Equals "D"	A	1	M			
		rd	for the						
		Туре	Detail						

			Record.			
2	2- 3	State Abbr eviati o n	The 2 letter state abbreviatio n that this case is for.	A	2	М
3	4- 23	Case Num ber	The case number.	A	20	M
4	24 - 28	FIPS Code	The county code. (optional: zero fill if unkno wn)	N	5	0
5	29 - 37	SSN	The social security number of the employee for this case.	N	9	M
6	38 - 57	First Nam e	The first name of the employee. (no periods or commas)	A	20	М
7	58 - 77	Last Nam e	The last name of the emplo yee. (no periods or commas)	A	20	Μ
8	78 - 87	Amo unt	The dollar amount of the withholdin g. Decimal implied. Zero filled. This field can be zero but the employee must be marked as	N	10	Μ

			Terminated.			
9	88 - 88	Medi cal Indic ator	Indicator for medical coverage. 0- Em ployee eligible for medical coverage. 1- No coverage.	N	1	M
1	89 - 89	Empl oym e nt Indicator	Indicator for employme nt status. 0- Empl oyee is no longer employed. 1- Still under employment.( If amount (field 8) is zero, the Employme nt Indicator (field 10) must be "0"	N	1	M
File Tra	ailer Record			F .	1.	L .
1	1- 1	Reco rd Type	Equals "T" for the File Header Record.	A	1	М
2	2- 6	Total Detai I Coun t	Total number or detail record in file. Zero filled.	N	5	M

3	7-	Total	The	Ν	12	М
	18	Amo	dollar			
		unt	amou			
			nt for			
			all			
			withho			
			lding			
			in the			
			file.			
			Decim			
			al			
			implie			
			d.			
			Zero			
			filled.			

# Fixed length Payment Group example:

**HExpert Pay** 

This		This is		
		your		
is		Profile		
your		Name.		
record				
type.				
Н	Expert Pay			

DPA99999999999999999995555522222222JOHN

SMITHS

00000200011

This	State	Case	FIPS	The social	First	Last name
is the	Abbrevi	Number	Code.	security	name	of
record	ation		The	number of	of	employee.
type.			county	employee.	employ	
			code.		ee.	
D	PA	9999999999 999999999999999999999999999	55555	222222222	JOHN	SMITH

T00001000000010000

This is	This is	Total dollar
the	the	amount for all
record	total	withholdings in
type.	number	file.
	or	
	detail	
	record	
	in file.	

|--|

# Below is an example of how your fixed length format file may look with 3 employees:

HExpert Pay		
DPA999999999999999999995555522222222JOHN	SMITHS	000001000011
DPA999999999999999999995555522222222STAN	JOANS	000001000011
DPA999999999999999999995555522222222SALLY	STANTS	000001000011
T0000300000030000		

## CSV format - Payment Group file:

I D	Ele me nt Na me	Conte nts/No t es.	Typ e A=A Ipha num eric N=N ume r ic	L e n g t h	De li mi t er	MOC M=m andat o ry O=opt ional C=con dition al
File He	ader Record					
1	Re cor d Typ e	Equals "H" for the File Header Record	A	1	3	М
2	Pro file Na me	The name of the profile to create.	A	5 0	3	М
3	For mat Typ e	Format type of the file - consta nt 'CSV'	A	3	,	M
Detail F	Record					
1	Re cor d Typ	Equals "D" for the Detail Record.	A	1	3	M

	e					
2	State Abbreviati on	The 2 letter state abbreviation that this case is for.	A	2	,	M
3	Case Number	The case number.	A	20	,	M
4	FIPS Code	The county code. (Optional: zero fill if unknown)	N	5	,	0
5	SSN	The social security number of the employee for this case. Note: When creating this file in EXCEL make sure that the data type of this column is TEXT. If the data type is not TEXT and if there are leading zeros, EXCEL will remove the zeros when you tab out of this field.	N	9	,	M
6	First Name	The first name of the employee.	A	20	,	Μ
7	Last Name	The last name of the employee.	A	20	,	Μ
8	Amount	The dollar amount of the withholding. Decimal implied. Zero filled. This field can be zero.	N	10	,	M

9	Medical Indicator	Indicator for medical coverage. 0- Employee eligible for medical coverage. 1- No coverage.	N	1	,	M
1 0	Employm e nt	Indicator for employment	Ν	1	3	М
	Indicator	status. 0-Employee is no longer employed. 1- Still under employment. (If amount (field 8) is zero, the Employment Indicator (field 10) must be "0"				
File Trai	ler Record					
1	Record Type	Equals " T " for the File Header Record.	A	1	,	М
2	Total Detail Count	Total number or detail record in file.	N	5	,	М
3	Total Amount	The dollar amount for all withholding in the file. Decimal implied.	N	1 2	,	Μ

## CSV format Payment Group example:

H,Expertpay,CSV,,,,,,					
This	This is	This is			
is	your	your			
your	Profile	tormat			
record	Name.	type			

type.		
Н	Expert Pay	CSV

#### D,FL,9999999999999999955555,9999999999,John,Smith,143

			71,0,1				
This is the record type.	State Abbreviation	Case Number	FIPS Code. The county code.	The social security number of employee	First name of employ ee.	Last name of employee	
D	FL	99999999 9999999	55555	9999999 99	JOHN	SMITH	

T,3,42472,,,,,,

This is	This is	Total dollar
the	the	amount for
record	total	all
type.	number	withholdings
	or	in file.
	detail	
	record	
	in file.	
Т	3	42472

## Below is an example of how your CSV format file may look with 3 employees when opened in a text editor:

## Reports

Via the Payment History menu option ExpertPay allows you to make a payment search selection from either Transaction History or Employee History and generate the results as a .pdf or .csv report.

Payment	This report lists payments that you have			
Transaction	made.			
Report	Selection Criteria:			
	<ul> <li>Date Submitted (from/to)</li> </ul>			
	<ul> <li>Effective Date (from/to)</li> </ul>			
	Payment Name			
	Status			

Employee Transaction	This generates a payment history by
Report	Selection Criteria:
Roport	SSN (employee SSN)
	Effective Date (from/to)

#### How to generate a payment transaction report

- 1. Click on **Payment History Menu** on the menu bar
- 2. Choose/select the search criteria you need
- 3. Click Search
- 4. Export results via PDF or CSV using those buttons

#### How to generate an employee transaction report

- 1. Click on **Payment History Menu** from the menu bar.
- 2. Choose / select the SSN of the employee and the date range.
- 3. Click Search.
- 4. Export results via PDF or CSV using those buttons

## **Manage Users**

The person who initially registers is the "Primary User". The Primary User may perform the following administrative functions.

- Add other users
- Assign rights or permissions to users
- Delete users

Welcome, <b>Barb A</b> Edit Prima Manage Change Pa Log O	Arthur V ry User User issword				
<b>ExpertPay</b> *	Employers				Welcome, Jahier Cordova 🔻
Payment Methods	Payment Group	Payment Center	Payment History		
Manage Users					
Below is a list of your acc	ount users. Please select	t the function popup wher	n you click on each record	to Edit/Delete.	
Add User					
					*Legends : 🖍 Edit   🛛 🗶 Delete
USER ID <b>≑</b>		NAME 🗢	S	TATUS 🗢	ACTION

#### How to add a user

- 1. Select Manage user from dropdown.
- 2. Click Add user.
- 3. Supply the required information.
- 4. Select Active status.
- 5. Select the appropriate **user rights** or permissions from the drop-down list.
- 6. Click Save button.

#### How to delete a user

- 1. Select Manage users from the menu bar.
- 2. Click user in the list of users
- 3. Click **Delete** when clicking on the user you wish to delete.
- 4. Click Delete.

#### How to edit a user

- 1. Select **Manage users** from the menu bar.
- 2. Click user in the list of users.
- 3. Click Edit
- 4. Edit the desired information.
- 5. Click Save.

## **Payment Center:**

## Prepare a Payment Using a Payment Group

Preparing a payment is a procedure used to indicate the amount of money that is going to be transferred from your (the employer) bank account, via ExpertPay, to a SDU (State Disbursement Unit) account.

ExpertPay	Employers			Welcome, Jahier Cordova 🔻
Payment Methods	Payment Group	Payment Center	Payment History	
Payment Center				
Choose a payment gro	oup	~	Make a payment	
Pending Payment I	L <b>ist</b> - to submit, edit, viev	w or cancel pending paym	ents click on the paymen	t name. *Legends∶® View ⑧ Cancel ଡ Submit 🖋 Edit
Transaction Number 🖨	Submitted Date <b>V</b>	Payment Name 🗢 Payr	nent Method 🗢 Effective	e Date ♦ Status ♦ Amount ♦ Action

#### How to prepare a payment using a payment group.

- 1. Click on **Payment center** on the menu.
- 2. In the dropdown box choose a Payment Group,
  - a. Select a group.
  - b. Click on Make a Payment

ExpertPay <sup>®</sup>	Employers			Welcome, Jahier Cordova 🔻
Payment Methods	Payment Group	Payment Center	Payment History	
Profile Detail				
Payment Group Nan	ne:	Name	1	
Payment Method:		MASTERCARD xxxxxxx	xxxx9733	
Number of Employe	es Applied:	1		
Payment Amount:		\$50.00	Make a payment	
		Export Profile detail	to: 📩 PDF 🕅 Excel	
mployee List - to ed	lit individual employee ir	formation please click on	employee name	
Search For Employee	Search	Add Employee		
	<b>c.</b> From infor sele	n the Paymen mation for this cted	t Detail tab you car s payment or chang	n view/edit any employee ge the bank account

- d. Click Continue
- e. From the Payment Time Tab you may enter the effective date and the withholding date and if you want to make this a recurring or one time payment

Welcome, Jahier Cordova 🔻

## ExpertPay<sup>\*</sup> Employers

Pa	yment Methods	Payment Group	Payment Center	Payment History			
M	ake Payment						
1	Payment Det	ail	2 Payme	nt Time	3	Payment Verification	
	Payment Frequ	ency:		Weekly		~	
	Starting with Ef	fective Date:		02/13/2024			
	Number of pay	ments:		O Pay until payment	s have be	en made or	
				Pay until further notice. or			
				$\bigcirc$ Pay until this date			
				mm/dd/yyyy			
	Cancel	Continue >					

#### 3. Click Continue.

	Employers	; 		Welcome, Jahler Cordo
ayment Methods	Payment Group	Payment Center	Payment History	
ayment Verificati	on			
1 Payment Deta	ail	2 Payment	Time	3 Payment Verification
Payment Name:		Name	Please	e review the payment information for accuracy.
Payment Method:		MASTERCARD xxxxxxxxx9733	Note: Effect	Money will be charged/debited on the above ive Date.
Number of Employee	Applied:	1		
Payment Amount:		\$50.00		
Payment Frequency:		Weekly		
Starting with Effective	a Date:	02/13/2024		
Pay until:		further notice		
Payment Fees:		\$1.25		
Registration Fee:		\$0.00		
Total /	mount Charged:	\$51.25		

4. The Payment Confirmation page allows you to review the summary information before then clicking **SUBMIT** 

**NOTE**: if you made any edits or deletions to employee information from the payment detail screen these changes will NOT be saved or reflected in the Payment Group.

#### **Pending Payment Note**

The information you see in the Payment list box includes a Status column. Because you clicked on **Submit payment**, the status is submitted. You may click on any payment in the pending payment list to Edit, View, or Cancel this payment.

#### How to prepare a payment using R&D payment group.

- 1. Click on **Payment center** on the menu.
- 2. In the dropdown box choose a Payment Group,
  - a. Select your R&D payment group.
  - b. Click on Make a Payment

ExpertPay <sup>®</sup>	Employers			Welcome, Jahier Cordova		
Payment Methods	Payment Group	Payment Center	Payment History			
Make a Payment						
1 Payment Deta	il	2 Payment	Time	3 Payment Verification		
Profile Detail						
Payment Name:     R&D fee       Payment Method:     Santander xxxxxxxxxx9733				Please review the payment information for accuracy. You can edit profile, but the characteristic activity offect on this payment		
Number Employee Ap	plied: 1		iew Employee List	Will not effect on the whole profile.		
Payment Amount:	\$65	.00				

- **c.** From the Payment Detail tab, you can view/edit any employee information for this payment or change the bank account selected
- **d.** Click **Continue** (a warning popup will notify the user that they have opted to make a receipt and disbursement fee (R&D fee) payment).

## WI R&D Payment Information

You have selected to make a receipt and disbursement fee (R&D fee) payment. Please note the R&D fee payment will be applied ONLY to the receipt and disbursement fee, it will NOT be used to pay child support. Please select ONE TIME as the payment frequency when making a payment. Please contact WI R&D customer service line at 414-615-2585 for any questions.



e. From the Payment Time Tab you may enter the effective date and the withholding date, for R&D payments the best option is select one-time payment.

Expe	rtPay <sup>®</sup>	Employers					١	Velcom	e, Jahier Cordova 🔻
Payment	Methods	Payment Group	Payme	nt Center	Payment History				
Make Pa	ayment								
<b>1</b> Pa	ayment Det	ail	2	Payment	: Time	3	Payment	Verifi	cation
Payr	ment Frequ	ency:			One-Time				
Effe	ctive Date:				08/21/2024			<u> </u>	
With	nholding Da	te:			08/21/2024			<b>**</b>	
Cance	el	Continue >							

#### 3. Click Continue.

xpertPay <sup>*</sup> Emplo	yers	Welcome, Jahier Co
yment Methods Payment	Group Payment Center	Payment History
yment Verification		
Payment Detail	2 Paymen	t Time <b>3</b> Payment Verification
Payment Name:	R&D fee	Please review the payment information for accuracy.
Payment Method:	MASTERCARD xxxxxxxxxxxxxxxx733	Note: Money will be charged/debited on the above
CVV		checkve bake.
Number of Employee Applied:	1	
Payment Amount:	\$65.00	
Payment Frequency:	One time	
Starting with Effective Date:	08/21/2024	
Payment Fees:	\$1.92	
Registration Fee:	\$2.50	
Total Amount Char	ged: \$69.42	
e above information correct and ready	for submittal?	
Cancel Sub	nit	

4. The Payment Confirmation page allows you to review the summary information before then clicking **SUBMIT** 

**NOTE**: if you made any edits or deletions to employee information from the payment detail screen these changes will NOT be saved or reflected in the Payment Group.

## Setup Recurring (RAW) Payment

This topic addresses how to set up a recurring payment. Recurring payments will be automatically submitted by the system at a predefined date. This will cause ExpertPay to transfer money from your bank account to the SDU.

You may create a recurring payment using an existing or uploaded profile. Please note any changes to this profile after submission of the recurring payment **WILL NOT** edit the recurring payment.

#### How to prepare a recurring payment

- 1. Click on **Payment center** on the menu.
- 2. In the dropdown box choose a Payment Group,
  - a. Select a profile.
  - b. Click on Make a Payment
  - **c.** From the Payment Detail tab you can view/edit any employee information for this payment or change the bank account selected
  - d. Click Continue
  - e. From the Payment Time Tab you may enter the effective date and the withholding date and if you want to make this a recurring payment.

#### f. Select the Payment Frequency you wish for this series

- 1. Monthly
- 2. Weekly
- 3. Every other week
- 4. 1<sup>st</sup> and 15<sup>th</sup> of the month

_		4							
E	xpertPay	Employers			Welcome, Jahier Cordova				
Pay	ment Methods	Payment Group	Payment Center	Payment History					
Ma	Make Payment								
1	Payment Deta	ail	2 Paymer	nt Time	3 Payment Verification				
	Payment Freque	ency:		Weekly	~				
	Starting with Ef	fective Date:		02/13/2024					
	Number of pay	ments:		🔿 Pay until 👘 paymen	ts have been made or				
				Pay until further notice. or					
				<ul> <li>Pay until this date</li> </ul>					
				mm/dd/yyyy					
[	Cancel	Continue >							

- g. Select the Starting Effective Date
- h. Select the Number of Payments
- 3. Click Continue.
- 4. The Payment Confirmation page allows you to review the summary information before then clicking **SUBMIT.**

## **Edit a Recurring Payment**

After you have prepared and submitted a recurring payment, you may want to edit the payment entry. Submitting a profile payment causes an entry to be generated in a "Pending Payment List" that can be accessed via the "Payment Center" screen. Follow the steps below to access the "Pending Payment List" and edit a recurring payment.

When editing a recurring payment there are two options, edit the current payment only or edit all occurrences in the recurring series. Each scenario is described below.

#### How to edit the current payment in a recurring series

- 1. Click on Payment center on the menu bar.
- 2. Locate the pending payment list towards the bottom of the screen.
- This list contains payment entries that have been saved or submitted by you for eventual transfer of money from your bank account to an SDU account.
- 4. Click on **Payment Name** to access the payment entry for editing OR click on the row containing the recurring payment and select edit from the popup
- 5. Click on **EDIT** button to edit

Note: The system displays the following warning, "Do you wish to edit THIS occurrence or ALL occurrences"

syment Methods	Payment Group	Payment Center	Payment Histo	жу				
ayment Center								
lhoose =		********** N	ARNING ********	**				
nding This paymen	t is a <mark>recurring</mark>	Payment. Do you wa	ant to change only to payment?	his occurer	nce or all occu	rences for th	nis	
nding This paymen	t is a recurring Edit th	Payment. Do you wa	ant to change only to bayment?	his occurer Edit all occur	ences	irences for t	nis si	/ Edit
Transact	t is a recurring Edit th If you ed	Payment. Do you wa	ant to change only to ayment?	his occurer Edit all occur ubmit this p	ences or all occu	irences for ti	nis sit	r Edit I
nding Transact PAYZ000 PAYZ000000000000000000000000000000000000	t is a recurring Edit th If you ed	Payment. Do you wa nis occurence lit this payment, you v Bo DO mition	ent to change only to bayment? will also have to res	his occurer Edit all occur ubmit this p	ences or all occu	s100.00	nis sit	/ Edit   n ) ©

6. Click on Edit this occurrence Note: The payment must be resubmitted after editing.

The system will save the changes to the current payment and automatically submit the next payment in the recurring series. The payment edited will no longer be displayed as a recurring payment on the Payment List.

#### How to edit all payments in a recurring series

- 1. . Click on Payment center on the menu bar.
- 2. Locate the pending payment list towards the bottom of the screen.
- 3. This list contains payment entries that have been saved or submitted by you for eventual transfer of money from your bank account to an SDU account.
- 4. Click on **Payment Name** to access the payment entry for editing OR click on the row containing the recurring payment and select edit from the popup
- Click on EDIT button to edit Note: The system displays the following warning, "Do you wish to edit THIS occurrence or ALL occurrences"

Payment Methods	Payment Group	Payment Center	Payment Hist	OEY			
Payment Center							
Chasta		********** W		***			
Service Service -							
Pending This payme	ent is a recurring F	Payment. Do you wa	nt to change only t	this occurer	ice or all occu	irences for th	is
Pending This payme	ent is a recurring F	Payment. Do you wa p	nt to change only 1 ayment?	this occurer	nce or all occu	irences for th	iis nit / i
Transact	ent is a recurring F Edit this If you edit	Payment. Do you wa p s occurence this payment, you w	nt to change only t ayment?	Edit all occurer Submit this p	ences	irences for th	iis nit 🗡 i
Transact Payzoot	ent is a recurring F Edit this If you edit	ayment. Do you wa p soccurence this payment, you w Ba	nt to change only t ayment? rill also have to res	this occurer Edit all occurs submit this p	ences	irences for <mark>t</mark> h	nit 🗡 i stion
Transiet PAYZ00000000448864	Edit this Edit this If you edit	ayment. Do you wa p cocurence this payment, you w Ba	nt to change only t ayment? ill also have to res	Edit all occurer submit this p	ences payment	s100.00	is nit / i

6. Click on Edit this occurrence Note: The payment must be resubmitted after editing.

## **Cancel a Recurring Payment**

After you have prepared and submitted a recurring payment, you may want to cancel the payment entry. Submitting a "Prepared Payment" causes an entry to be generated in a "Pending Payment List" box that can be accessed via the "Payment Center" menu. Follow the steps below to access the "Pending Payment List" and cancel a recurring payment.

When canceling a recurring payment there are two options, cancel the current payment only or cancel all occurrences in the recurring series. Each scenario is described below.

# How to cancel the current payment or all payments in a recurring series

- 1. Click on Payment center on the menu bar.
- 3. Locate the pending payment list towards the bottom of the screen.
- This list contains payment entries that have been saved or submitted by you for eventual transfer of money from your bank account to an SDU account.
- Click on **Payment Name** to access the payment entry for editing OR click on the row containing the recurring payment and select cancel from the popup
- 6. Click on **CANCEL** button to cancel
  - Note: The system displays the following warning, "Do you wish to cancel THIS occurrence or ALL occurrences"

ayment Methods	Payment Group	Payment Center	Payment History	
ancel Payment V	erification			
have requested to cance	el the following payment.			
Transaction Number:	PAY	2000000024338948		
Payment Name:	WEE	EKLY 11082019		
Effective Date:	01/1	3/20		
Withholding Date:	01/1	3/20		
Payment Method	XXX	X-XXXX-7777 JPMOR	GAN CHASE	
Number Employee App	plied: 13			
Total Payment Amount	t: \$2,8	82.57		
Payment Frequency:	REC	URRING		

## Submit, View, Edit, or Cancel a Payment

After you have prepared and saved a payment, you may want to submit, view, edit, or cancel a payment entry. Saving a "Prepared Payment" causes an entry to be generated in a "Pending Payment List" box that can be accessed via the "Payment

Center" screen. Follow the steps below to access the "Pending Payment List" and submit, view, edit, or cancel a payment.

#### How to submit, view, edit, or cancel a payment

- 1. Click on **Payment center** on the menu bar.
- 2. Locate the pending payment list towards the bottom of the screen. This box contains payment entries that have been saved by you for eventual transfer of money from your bank account to an SDU account.
- 3. Click on the payment you wish to submit, view, edit or cancel
  - a. **Submit** to initiate the submitting of the payment.
  - b. Edit to access the payment entry for editing.
  - c. **Cancel** to initiate cancelling the payment.
  - d. **View** to view the payment information.