

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.

The screenshot shows the top of the ExpertPay Employers interface. On the left, the 'ExpertPay' logo is followed by a vertical line and the word 'Employers'. On the right, the text 'Welcome, Jahier Cordova' is displayed with a downward-pointing triangle. Below this is a horizontal navigation bar with five teal-colored buttons: 'Payment Methods', 'Payment Group', 'Payment Center', 'Payment History', and an unlabeled button. The 'Payment Center' button is highlighted with a white background and teal text. Below the navigation bar, the 'Payment Center' page content is visible, starting with the text 'Payment Center' in teal.

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

ExpertPay®

America's #1 Child Support Payments Platform

by **CONDUENT** 

Click. Remit. Done.

With ExpertPay®, you have a quicker, easier, more secure way of making child support payments. Less time. Fewer errors. Lower costs. What can ExpertPay® do for you?

Employers

Electronically submit child support payments that you withhold from employees' paychecks.

GET STARTED

Payroll Service Providers

Reduce back-office backlogs and eliminate manual process time and costs.

GET STARTED

Parent Paying Support

Make child support payments with just the click of a mouse.

GET STARTED

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3. Select ExpertPay for Employers

ExpertPay® | Employers

New User? Register Now.

With ExpertPay®, you have a quicker, easier way of making child support payments. On the secure ExpertPay® website, you can:

- Save and maintain employer information as well as employee withholding information for quick payments
- Add multiple users to the account, and individually define each user's authorization
- Please note different fees and service charges may apply

Register now

Login

User ID

naylamunoz

Password

.....

Log in

[Forgot Your Password?](#)

New User? [Register now >](#)



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8:00 am to 8:00 pm Eastern Time

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4. Click on **Register Now** or **New User? Register Now >** 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® | Employers

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)

Employer Name *

Address *

City * State *

Zip * Zip Ext

The registration process consists of 3 easy steps.
For Step 1 simply complete the online form below with your company information. For Step 2, please enter registration information. For Step 3, verify your registration information. If the information is correct, accept the ExpertPay® Terms of Service and click AGREE & SUBMIT button. If you need to change this information, click the Edit button.
There will be a \$2.50 registration fee. [Why this fee?](#)

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

Register with ExpertPay®

1 Employer Information 2 User Information 3 Finish Setup

Create Account (Step 2 of 3)

User Name (First - Last) *

Phone * Ext

User ID (At least 6 characters) *

Email *

someone@company.com

Back Clear Form Save and Continue

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. User ID at least 6 characters

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

ExpertPay® Employers

Register with ExpertPay®

1 Employer Information 2 User Information 3 Finish Setup

Finish Setup (Step 3 of 3)

Employer Information

FEIN	874521231
Employer Name	Employer Test Name
Address	124 Any st
City	Any Town
State	IL
Zip	66025

Edit

Primary User

User ID	TestUser123
Phone	8546798561
Email	Testemail@test.com

Edit

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 printing your information, Read carefully the Terms and Conditions. Click the AGREE & SUBMIT button to finish setup.

Acceptance of Terms of Service
 Date Last Revised: June 25, 2019
 During 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 continued acceptance of these Terms of Service. If you do not agree, you may contact ExpertPay® Customer Service to have your registration cancelled, which will terminate your ExpertPay® access.
 Terms of Service Controlling Your Use of ExpertPay®
 The following Terms of Service (TOS) concern your use of ExpertPay® (ExpertPay®), and agreement with Conduent State & Local Solutions, Inc. By accessing this site, you
 I have read and accept the Terms of Service

Back AGREE & SUBMIT

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

ExpertPay® | Employers

New User? Register Now.

With ExpertPay®, you have a quicker, easier way of making child support payments. On the secure ExpertPay® website, you can:

- Save and maintain employer information as well as employee withholding information for quick payments
- Add multiple users to the account, and individually define each user's authorization
- Please note different fees and service charges may apply

[Register now](#)

Login

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 and click SUBMIT button. A new password will be sent to your registered email.
For forgot User ID, please call customer service.

Password Recovery

User ID *

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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® | Employers Welcome, Liz Liz ▾

[Payment Methods](#) [Payment Group](#) [Payment Center](#) [Payment History](#)

Change Password

New Password *

Confirm New Password *

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 (*).

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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.

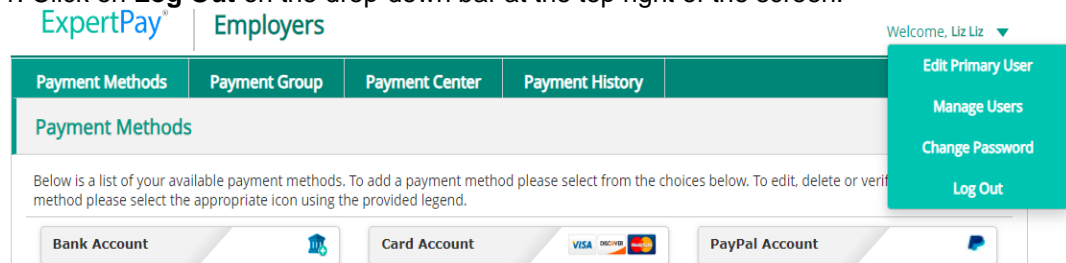
- Must include at least one upper and one lower case alpha character
- Contain at least one numeric digit or special character
- It must be different from the previous 6 passwords It may not contain part of the user id or be a personal name Exact - as they are case sensitive.

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.



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.
6. **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.

ExpertPay® Employers Welcome, Expert Pay ▼

Payment Methods | Payment Group | Payment Center | Payment History

Payment Methods

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 method please select the appropriate icon using the provided legend.

 Global Bank Account 2-4 Days for processing Fees vary by state + Add New	 Credit Card 2-4 Days to arrive at SDU Fees vary by state + Add New	 PayPal 2-4 Days to arrive at SDU Fees vary by state PayPal	 venmo 2-4 Days to arrive at SDU Fees vary by state + Add New	 Google Pay 2-4 Days to arrive at SDU Fees vary by state Unlink	 Apple Pay 2-4 Days to arrive at SDU Fees vary by state Unlink
--	--	--	--	--	---

*Legends: View | Edit | Delete | Verify Account | Verify NOC | Contact Us

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.

The screenshot shows the ExpertPay Employers interface. At the top right, it says "Welcome, Expert Pay". Below the navigation bar, there are tabs for "Payment Methods", "Payment Group", "Payment Center", and "Payment History". The "Payment Methods" tab is active, showing a list of available payment methods. Below the list, there is a legend with icons for View, Edit, Delete, Verify Account, Verify NOC, and Contact Us.

Payment Method	Processing Time	Fees	Action
Global Bank Account	2-4 Days for processing	Fees vary by state	+ Add New
Credit Card	2-4 Days to arrive at SDU	Fees vary by state	+ Add New
PayPal	2-4 Days to arrive at SDU	Fees vary by state	PayPal
venmo	2-4 Days to arrive at SDU	Fees vary by state	+ Add New
Google Pay	2-4 Days to arrive at SDU	Fees vary by state	Unlink
Apple Pay	2-4 Days to arrive at SDU	Fees vary by state	Unlink

*Legends: View | Edit | Delete | Verify Account | Verify NOC | Contact Us

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.

Payment Methods	Payment Group	Payment Center	Payment History
Add Bank Account			
<p>① Employers using ACH Positive Pay or Debit Blocks must notify their bank or modify their bank account settings to accept ACH debits from ExpertPay with Company ID 1131996647. If you do not utilize Debit Blocks or ACH Positive Pay services, this action is not required.</p>			
Routing Transit Number ? * <input type="text"/>		<p>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® and verify the transaction information. Once this has been successfully completed, you will have the ability to submit your child support payments through ExpertPay® using this bank account. All new bank accounts must complete this exercise. There are no exceptions.</p> <p>Required fields are marked with a red asterisk (*).</p>	
Account Number * <input type="text"/>			
Account Type * <input type="text" value="Checking"/> ▾			
<input type="button" value="Cancel"/> <input type="button" value="Save and 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.

Payment Methods	Payment Group	Payment Center	Payment History
Payment Methods			
<p>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 method please select the appropriate icon using the provided legend.</p>			

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



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.***

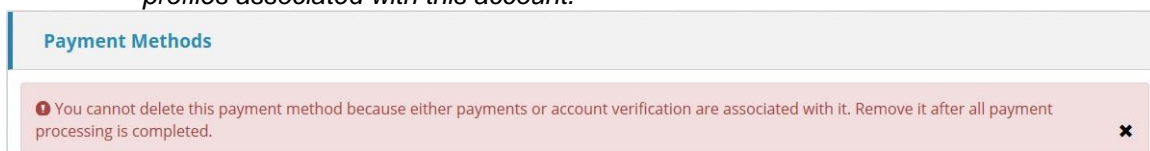
Delete Bank Account

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.

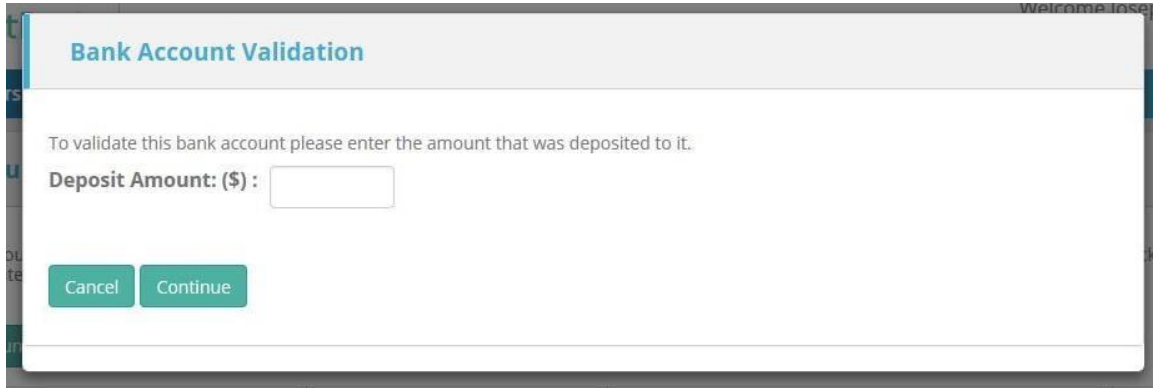


Bank Account Verification

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.

A screenshot of a web application window titled "Bank Account Validation". The window has a light blue header with the title. Below the header, there is a message: "To validate this bank account please enter the amount that was deposited to it." Below this message is a label "Deposit Amount: (\$)" followed by a text input field. At the bottom of the form area, there are two buttons: "Cancel" and "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.

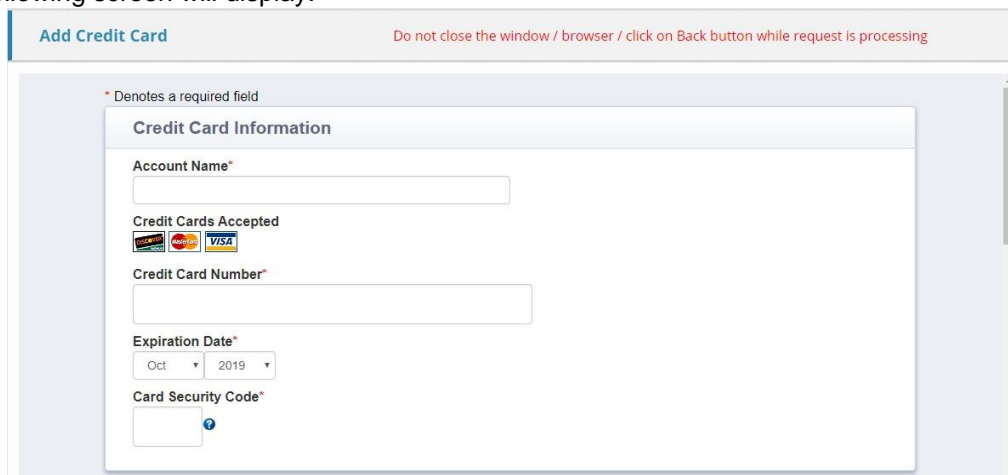
When you successfully validate the transaction amount your bank account will be activated and you will be able to submit payments with it.

Add Credit Card Account

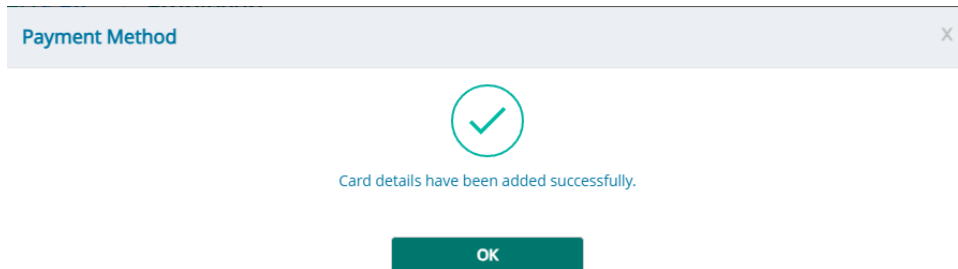
How to add a credit card account

From the **Payment Methods** screen, select Pay By CreditCard

The following screen will display:

A screenshot of a web application window titled "Add Credit Card". At the top right of the window, there is a red warning message: "Do not close the window / browser / click on Back button while request is processing". Below this, there is a form titled "Credit Card Information". The form contains several fields: "Account Name*" (a text input field), "Credit Cards Accepted" (with icons for MasterCard, Discover, and Visa), "Credit Card Number*" (a long text input field), "Expiration Date*" (with dropdown menus for month and year, currently showing "Oct" and "2019"), and "Card Security Code*" (a text input field with a small blue information icon to its right). A legend at the top left of the form area states "* Denotes a required field".

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



Edit Credit Card Account

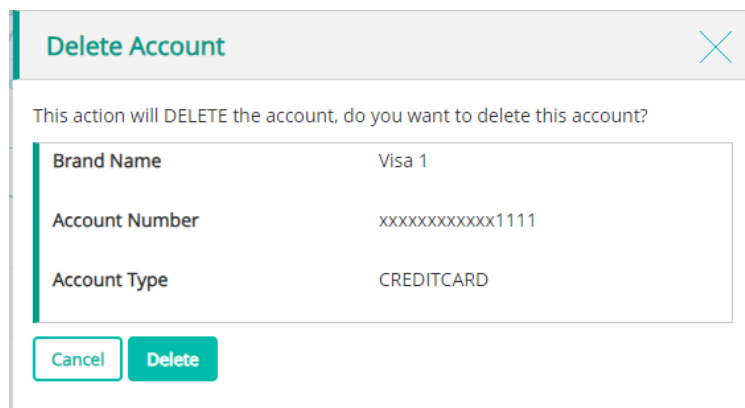
There may be a time when you want to edit credit card account information.

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.

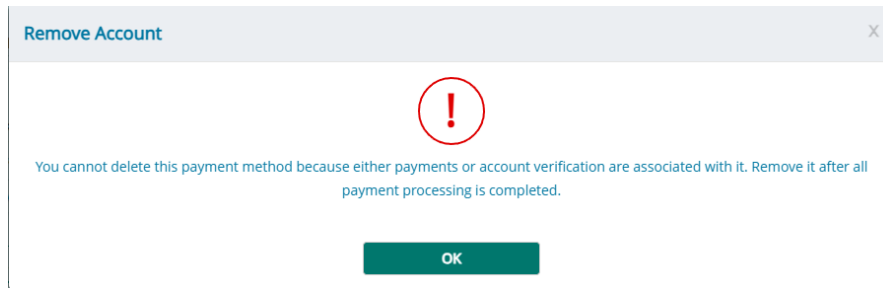
Delete Credit Card Account

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



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.*



Add PayPal Account

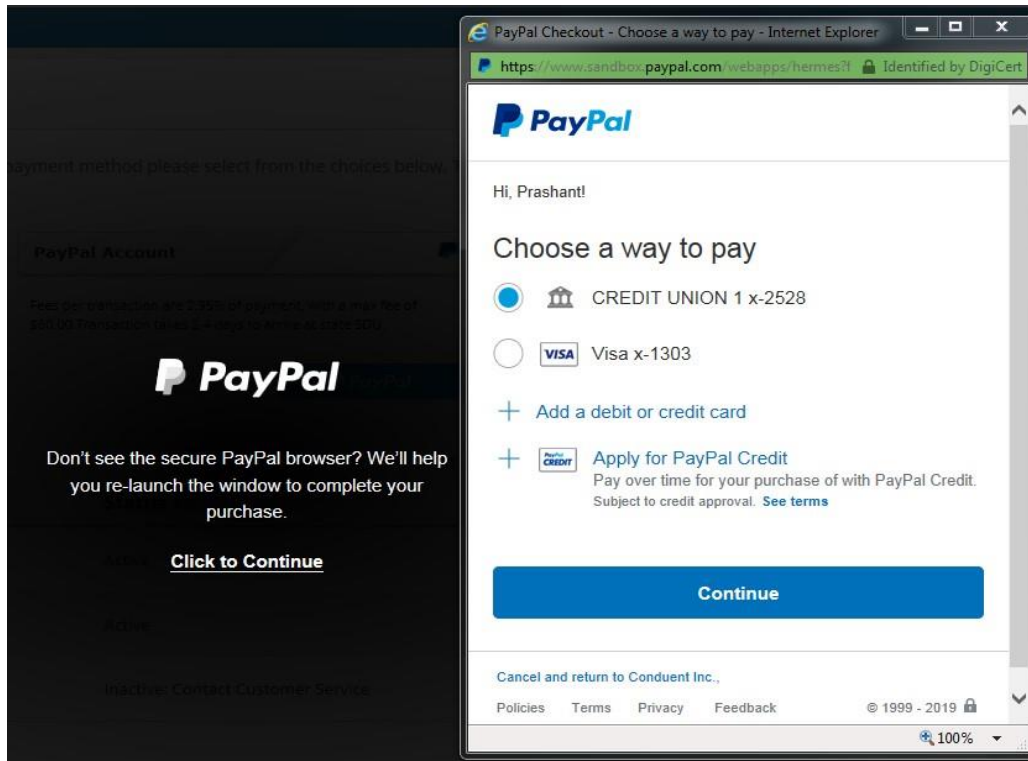
How to add a PayPal account

From the Payment Methods screen, select **PayPal**

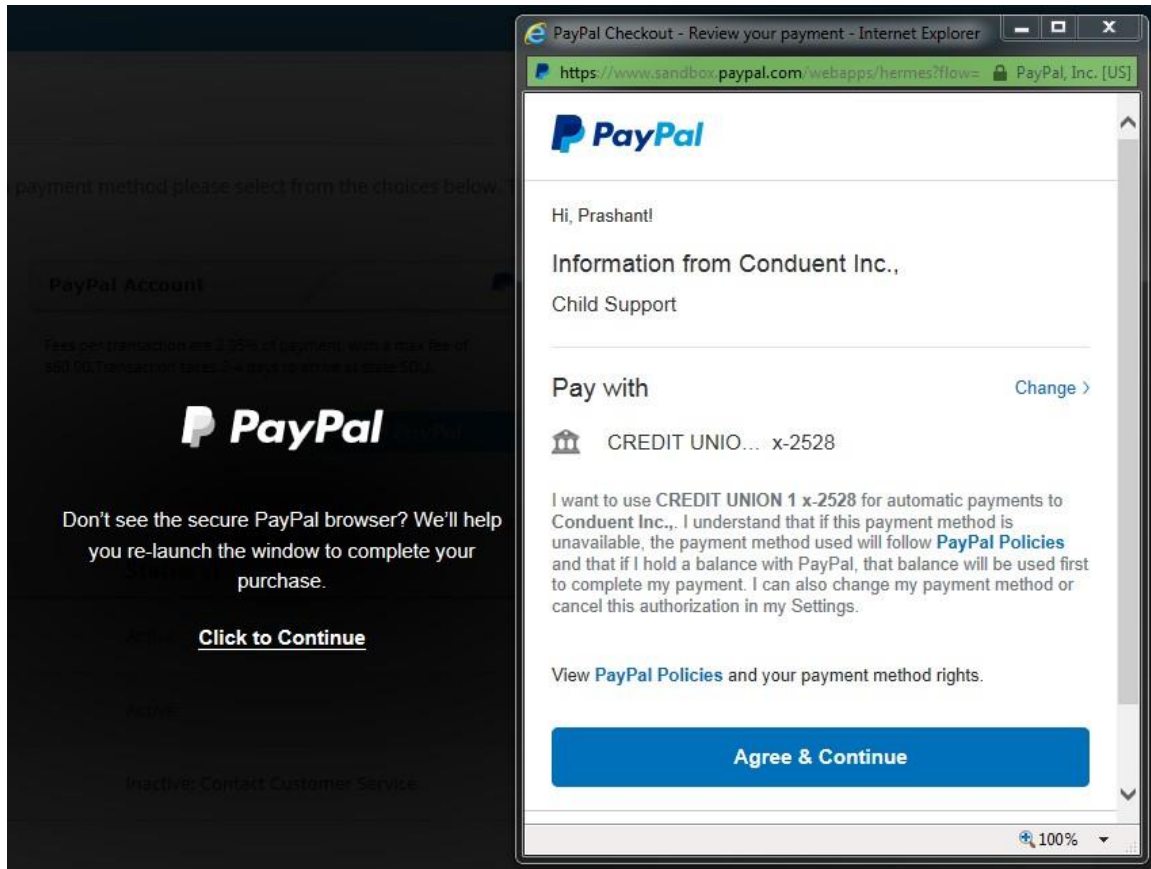
The following screen will display:

A screenshot of the "Pay with PayPal" login screen. At the top center is the PayPal logo. Below it, the text reads "Pay with PayPal" and "With a PayPal account, you're eligible for Purchase Protection and Rewards." There are two input fields: "Email or mobile number" and "Password". Below the password field is a link that says "Forgot password?". A blue button labeled "Log In" is positioned below the "Forgot password?" link. Below the "Log In" button is a horizontal line with the word "or" centered underneath it. At the bottom, there is a rounded rectangular button labeled "Create an Account".

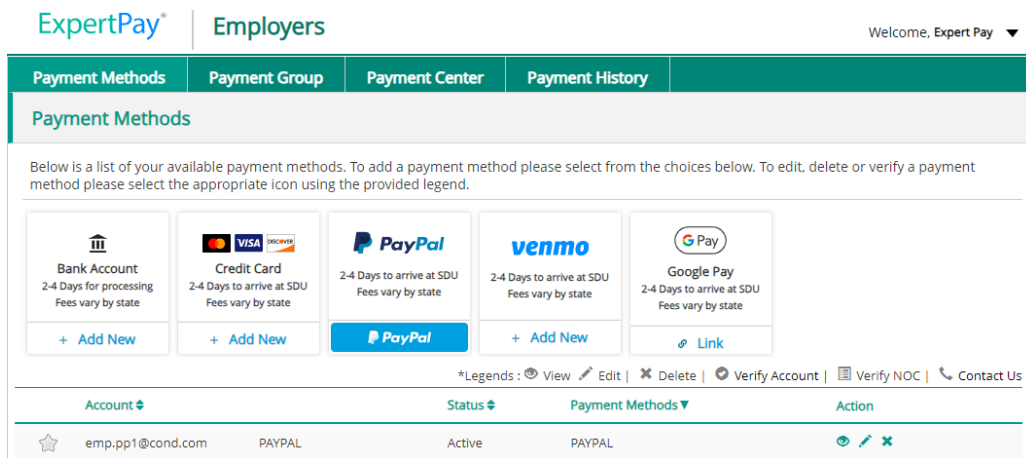
1. Enter your PayPal login information (email), or Create an Account with PayPal.
2. Enter your PayPal password
3. Click **Log In**



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.



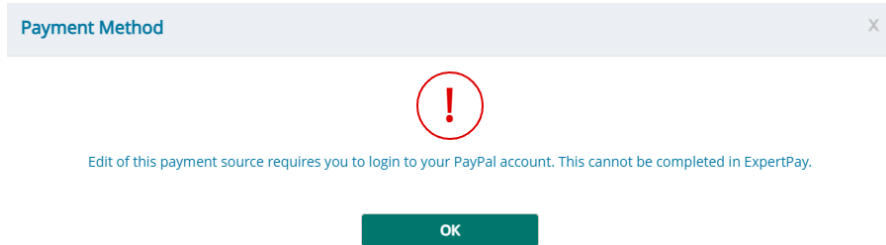
8. Your PayPal account will now display as a Payment Method option for you to make a payment.

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>

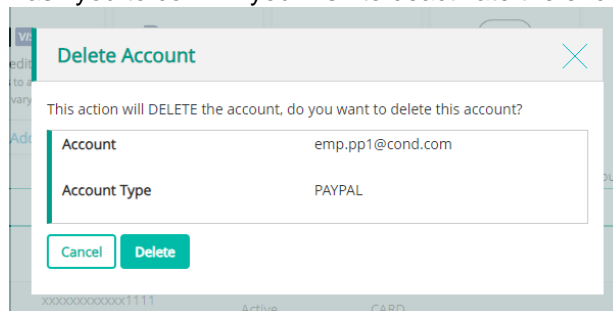


Delete PayPal Account

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

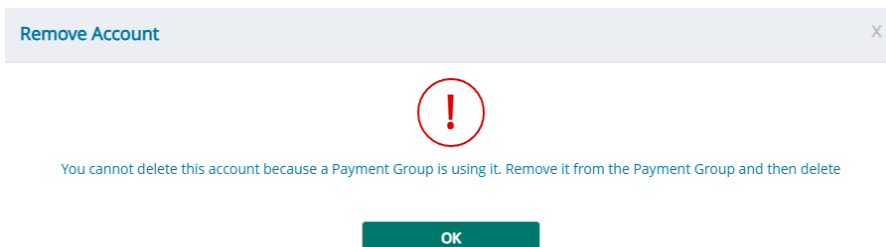
How to delete a PayPal account

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.



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.

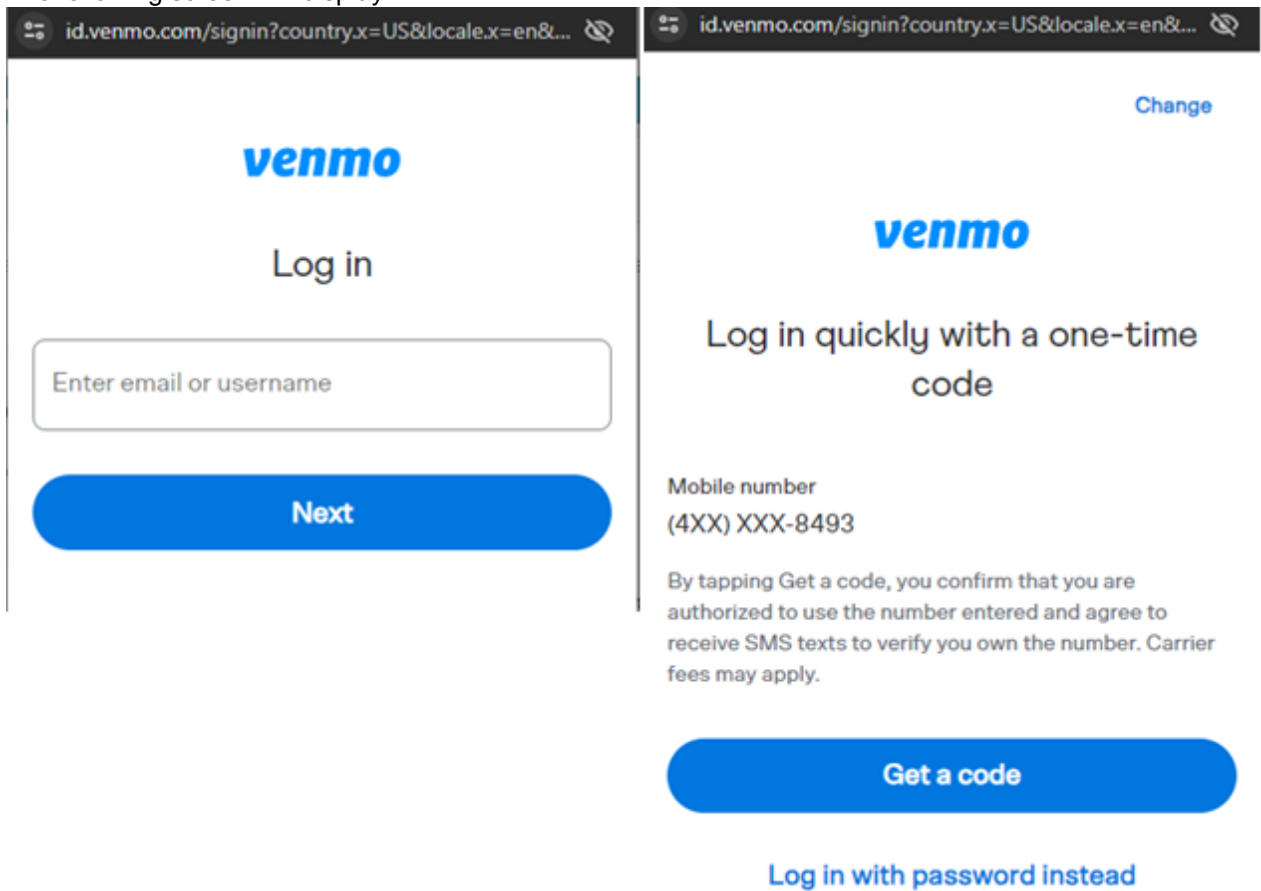


Add Venmo Account

How to add a Venmo account

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

The following screen will display:



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.

Payment Method X



To edit this payment method, please login to your Venmo account. This cannot be completed in ExpertPay.

OK

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 X

This action will DELETE the account. do you want to delete this account?

Account	ryc@gmail.com
Account Type	VENMO

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.

Remove Account X



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

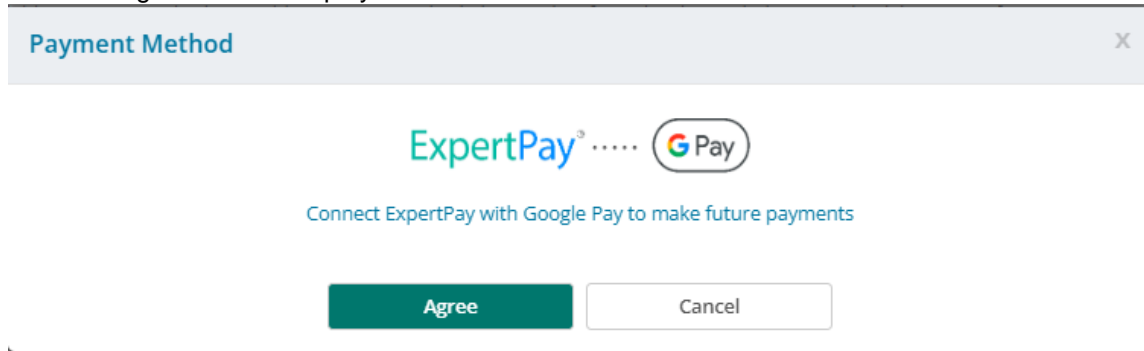
OK

Add Google Pay Account

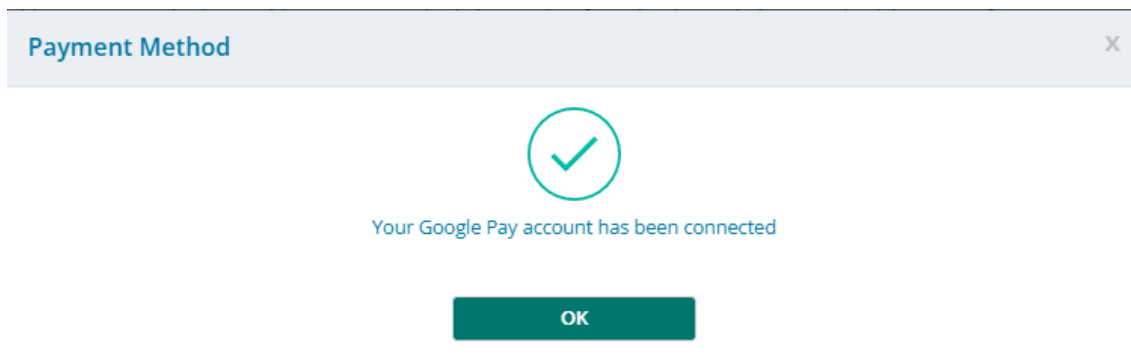
How to add a Google Pay account

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

The following screen will display:



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.



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

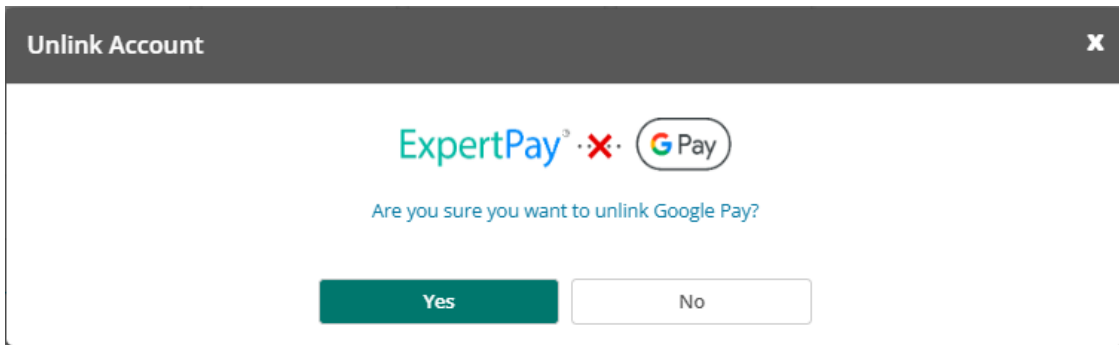
1. You must log directly into Google Pay to edit your Google Pay account information and preferences.

Delete Google Pay Account

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

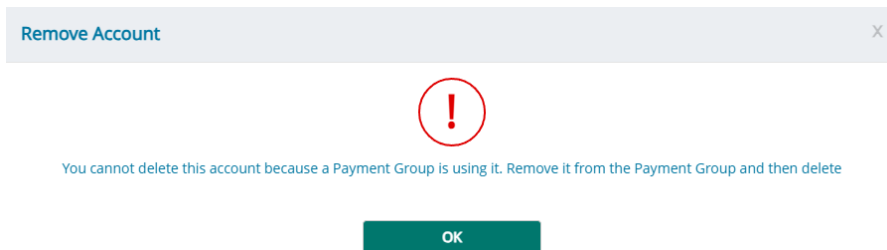
How to delete a Google Pay account

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.



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.

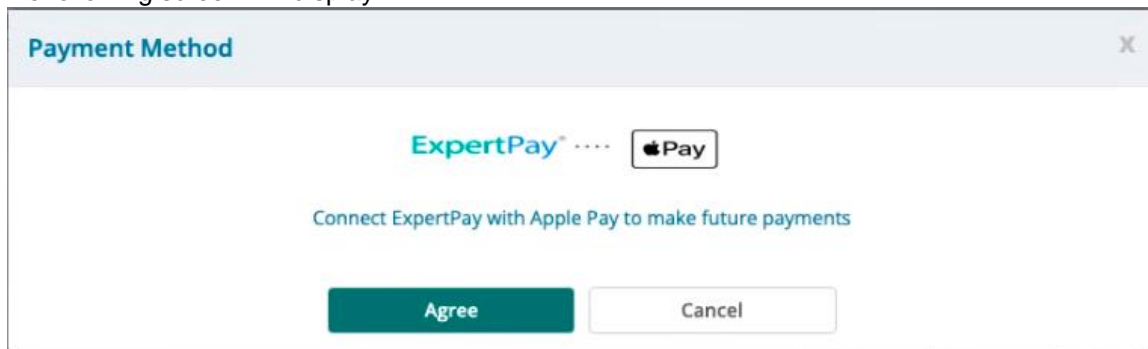


Add Apple Pay Account

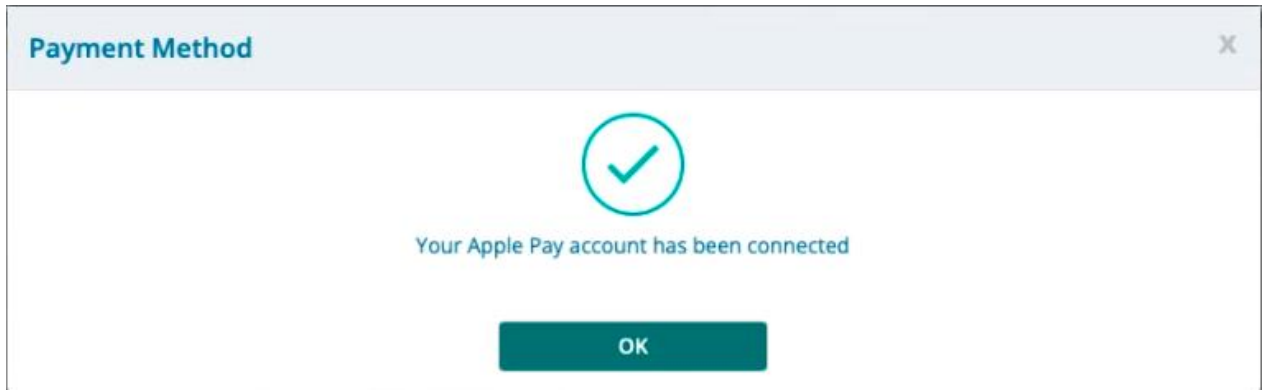
How to add an Apple Pay account

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

The following screen will display:



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

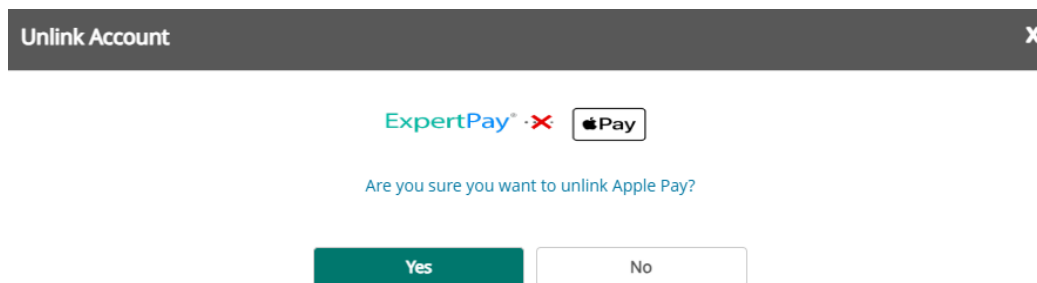
1. You must log directly into Apple Pay to edit your Apple Pay account information and preferences.

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.



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

X



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

OK

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.

ExpertPay® Employers Welcome, Jahier Cordova

Payment Methods | **Payment Group** | Payment Center | Payment History

Payment Group

Below is a list of your withholding payment groups. Payment groups are used to create and submit employee withholding payments on a regular basis. Click on Profile name to view and/or edit the details of payment group.

Search for Profile

*Legends : ✕ Delete

Profile Name	Payment Method	Account	Number of Employees	Payment Amount	Action
--------------	----------------	---------	---------------------	----------------	--------

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® Employers Welcome, Jahier Cordova

Payment Methods | **Payment Group** | Payment Center | Payment History

Add Profile

Payment Group Name:

Select Payment Method:

Number of Employees Applied:

Payment Amount: \$0.00

Employee List

Search for Employee

Employee Name	SSN	State	State Identification Number	FIPS	Withholding Amount	Includes Medical
No Record Found						

6. Enter Employee Withholding information

The screenshot shows the 'Add Employee' form in the ExpertPay system. The form is titled 'Add Employee' and is part of the 'Employers' section. It contains several input fields and a dropdown menu, all marked with a red asterisk to indicate they are required. The fields are: First Name, Last Name, 9-Digit Social Security Number, State Where Payment is Sent (a dropdown menu), FIPS (a dropdown menu), State Identification Number, Withholding Amount (\$), and Includes Medical (radio buttons for 'yes' and 'no'). A checkbox for 'Employment' is also present, with the text 'Check here if employee is no longer employed'. A yellow warning box in the top right corner of the form area says: 'Add or edit employee information on this form. Asterisk (*) indicates a required field.' At the bottom of the form is a 'Save and Add Employee' button. The background shows a sidebar with navigation options like 'Payment', 'Add Payment', 'Search', and 'Employment', and a top navigation bar with the ExpertPay logo and a user profile dropdown.

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

Current Support R&D Payment

FIPS: 

R&D Payment

State Identification Number: 

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.

OK

- Once all the information is entered you will need to click Save and Add Employee.
- 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
R&D, WISCONSING	XXX-XX-345	WI	7845210	R&D Payment	\$65.00	no

Cancel Save and Complete

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.

The screenshot shows the 'Add Employee' form in the ExpertPay Employers interface. The form contains the following fields and options:

- First Name: [Text Input]
- Last Name: [Text Input]
- 9-Digit Social Security Number: [Text Input]
- State Where Payment is Sent: [Dropdown Menu]
- FIPS: [Dropdown Menu]
- State Identification Number: [Text Input]
- Withholding Amount (\$): [Text Input]
- Includes Medical: yes no
- Employment: Check here if employee is no longer employed

A yellow tooltip box contains the text: "Add or edit employee information on this form. Asterisk (*) indicates a required field." The 'Save and Add Employee' button is located at the bottom of the form.

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. [Click here](#) for information on setting up a bank account and selecting a default account.

[Click here](#) 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:

ID	Position	Element Name	Contents/ Notes.	Type A=Alphabetic N=Numeric	Length	MOC M=mandatory O=optional C=conditional
File Header Record						
1	01-01	Record Type	Equals "H" for the File Header Record.	A	1	M
2	2-50	Profile Name	The name of the profile to create.	A	50	M
Detail Record						
1	1	Record Type	Equals "D" for the Detail	A	1	M

			Record.			
2	2-3	State Abbreviation	The 2 letter state abbreviation that this case is for.	A	2	M
3	4-23	Case Number	The case number.	A	20	M
4	24-28	FIPS Code	The county code. (optional: zero fill if unknown)	N	5	O
5	29-37	SSN	The social security number of the employee for this case.	N	9	M
6	38-57	First Name	The first name of the employee. (no periods or commas)	A	20	M
7	58-77	Last Name	The last name of the employee. (no periods or commas)	A	20	M
8	78-87	Amount	The dollar amount of the withholding. Decimal implied. Zero filled. This field can be zero but the employee must be marked as	N	10	M

			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 0	89 - 89	Empl oym e nt Indicator	Indicator for employe nt status. 0- Empl oyee is no longer employed. 1- Still under employment.(If amount (field 8) is zero, the Employe nt Indicator (field 10) must be "0"	N	1	M
File Trailer Record						
1	1- 1	Reco rd Type	Equals "T" for the File Header Record.	A	1	M
2	2- 6	Total Detai l Coun t	Total number or detail record in file. Zero filled.	N	5	M

T	00001	000000010000
---	-------	--------------

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

```
HExpert Pay
DPA999999999999999999999999555522222222JOHN      SMITHS      000001000011
DPA999999999999999999999999555522222222STAN      JOANS       000001000011
DPA999999999999999999999999555522222222SALLY     STANTS      000001000011
T000030000000030000
```

CSV format - Payment Group file:

ID	Element Name	Contents/Notes.	Type A=Alphanumeric N=Numeric	Length	Delimiter	MOC M=mandatory O=optional C=conditional
File Header Record						
1	Record Type	Equals "H" for the Header Record.	A	1	,	M
2	Profile Name	The name of the profile to create.	A	50	,	M
3	Format Type	Format type of the file - constant 'CSV'	A	3	,	M
Detail Record						
1	Record Type	Equals "D" for the Detail Record.	A	1	,	M

	e					
--	---	--	--	--	--	--

2	State Abbreviation	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	,	O
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	,	M
7	Last Name	The last name of the employee.	A	20	,	M
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
10	Employment Indicator	Indicator for employment 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"	N	1	,	M
File Trailer Record						
1	Record Type	Equals " T " for the File Header Record.	A	1	,	M
2	Total Detail Count	Total number or detail record in file.	N	5	,	M
3	Total Amount	The dollar amount for all withholding in the file. Decimal implied.	N	12	,	M

CSV format Payment Group example:

H,Expertpay,CSV,,,,,,,,

This is your record	This is your Profile Name.	This is your format type
---------------------	----------------------------	--------------------------

type.		
H	Expert Pay	CSV

D,FL,9999999999999999,55555,999999999,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 the record type.	This is the total number or detail record in file.	Total dollar amount for all withholdings in file.
T	3	42472

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

H,Expertpay,CSV,,,,,,,,
D,FL,9999999999999999,55555,999999999,John,Smith,14371,0,1
D,FL,9999999999999999,55555,999999999,Jose,AlvaradoJr,17701,0,1
D,FL,9999999999,55555,999999999,Brandon,Bauman,10400,0,1
T,3,42472,,,,,,,,

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 Transaction Report	<p>This report lists payments that you have made.</p> <p>Selection Criteria:</p> <ul style="list-style-type: none"> • Date Submitted (from/to) • Effective Date (from/to) • Payment Name • Status
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Employee Transaction Report	<p>This generates a payment history by employee report.</p> <p>Selection Criteria:</p> <ul style="list-style-type: none"> • SSN (employee SSN) • Effective Date (from/to)
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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, **Barb Arthur** ▼

- Edit Primary User
- Manage User
- Change Password
- Log Out

ExpertPay® | Employers Welcome, **Jahier Cordova** ▼

Payment Methods | Payment Group | Payment Center | Payment History

Manage Users

Below is a list of your account users. Please select the function popup when you click on each record to Edit/Delete.

[Add User](#)

*Legends : Edit | Delete

USER ID	NAME	STATUS	ACTION
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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.

The screenshot shows the ExpertPay Employers interface. At the top, there is a navigation bar with 'ExpertPay' and 'Employers' on the left, and 'Welcome, Jahier Cordova' on the right. Below this is a menu bar with 'Payment Methods', 'Payment Group', 'Payment Center', and 'Payment History'. The 'Payment Center' tab is active. The main content area has a header 'Payment Center' and a dropdown menu labeled 'Choose a payment group' with a 'Make a payment' button next to it. Below the dropdown is a 'Pending Payment List' section with a note: 'to submit, edit, view or cancel pending payments click on the payment name.' and a legend: '*Legends: View Cancel Submit Edit'. The table below has columns: Transaction Number, Submitted Date, Payment Name, Payment Method, Effective Date, Status, Amount, and 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**

Payment Methods	Payment Group	Payment Center	Payment History
Profile Detail			
Payment Group Name:	Name		
Payment Method:	MASTERCARD xxxxxxxxxxxx9733		
Number of Employees Applied:	1		
Payment Amount:	\$50.00	Make a payment	
Export Profile detail to:  PDF  Excel			

Employee List - to edit individual employee information please click on employee name

[Search](#) [Add Employee](#)

- 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 or one time payment

Payment Methods	Payment Group	Payment Center	Payment History		
Make Payment					
1 Payment Detail		2 Payment Time		3 Payment Verification	
Payment Frequency:	Weekly ▾				
Starting with Effective Date:	02/13/2024 				
Number of payments:	<input type="radio"/> Pay until <input type="text" value=""/> payments have been made or				
	<input checked="" type="radio"/> Pay until further notice. or				
	<input type="radio"/> Pay until this date				
	mm/dd/yyyy 				
Cancel		Continue >			

3. Click **Continue**.

ExpertPay® Employers Welcome, Jahier Cordova ▾

Payment Methods | Payment Group | Payment Center | Payment History

Payment Verification

1 Payment Detail | 2 Payment Time | 3 Payment Verification

Payment Name:	Name
Payment Method:	MASTERCARD xxxxxxxxxxxx9733
CVV	...
Number of Employee Applied:	1
Payment Amount:	\$50.00
Payment Frequency:	Weekly
Starting with Effective Date:	02/13/2024
Pay until:	further notice
Payment Fees:	\$1.25
Registration Fee:	\$0.00

Total Amount Charged: \$51.25

Please review the payment information for accuracy.
Note: Money will be charged/debited on the above Effective Date.

Is the above information correct and ready for submittal?

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® Employers Welcome, Jahier Cordova ▾

Payment Methods | Payment Group | Payment Center | Payment History

Make a Payment

1 Payment Detail | 2 Payment Time | 3 Payment Verification

Profile Detail

Payment Name:	R&D fee	
Payment Method:	Santander xxxxxxxxxxxx9733	
Number Employee Applied:	1	View Employee List
Payment Amount:	\$65.00	

[Cancel](#) [Continue >](#)

Please review the payment information for accuracy. You can edit profile, but the change will only effect on this payment. Will not effect on the whole profile.

- 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.

ExpertPay® Employers Welcome, Jahier Cordova ▾

Payment Methods | Payment Group | Payment Center | Payment History

Make Payment

1 Payment Detail | 2 Payment Time | 3 Payment Verification

Payment Frequency:

Effective Date:

Withholding Date:

[Cancel](#) [Continue >](#)

3. Click **Continue**.

ExpertPay® Employers Welcome, Jahier Cordova ▾

Payment Methods | Payment Group | Payment Center | Payment History

Payment Verification

1 Payment Detail | 2 Payment Time | 3 Payment Verification

Payment Name:	R&D fee
Payment Method:	MASTERCARD xxxxxxxxxxxx9733
CWV	... ⓘ
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 Charged: \$69.42	

Please review the payment information for accuracy.
Note: Money will be charged/debited on the above Effective Date.

Is the above information correct and ready for submittal?

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. 1st and 15th of the month

- 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

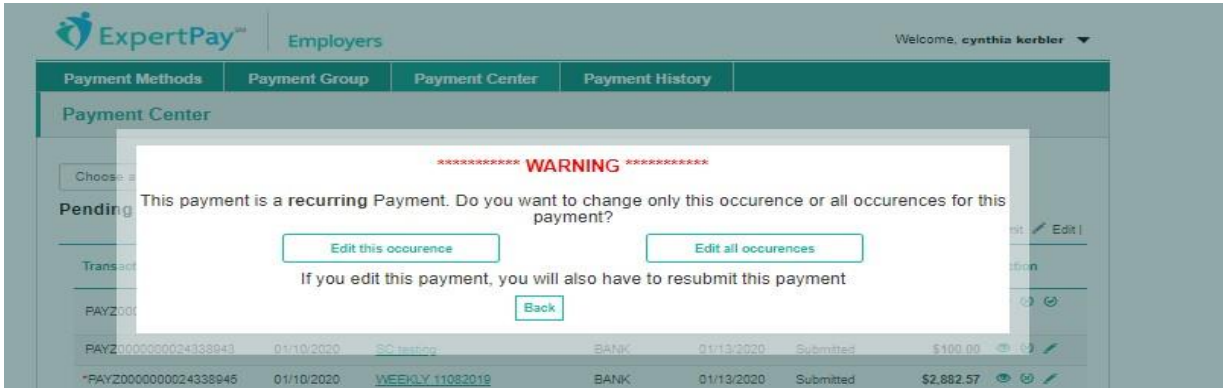
After you have prepared and submitted a recurring payment, you may want to edit the payment entry. Submitting a profile payment causes an entry to be generated in a "Pending Payment List" that can be accessed via the "Payment Center" screen. Follow the steps below to access the "Pending Payment List"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

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



6. Click on **Edit this occurrence**

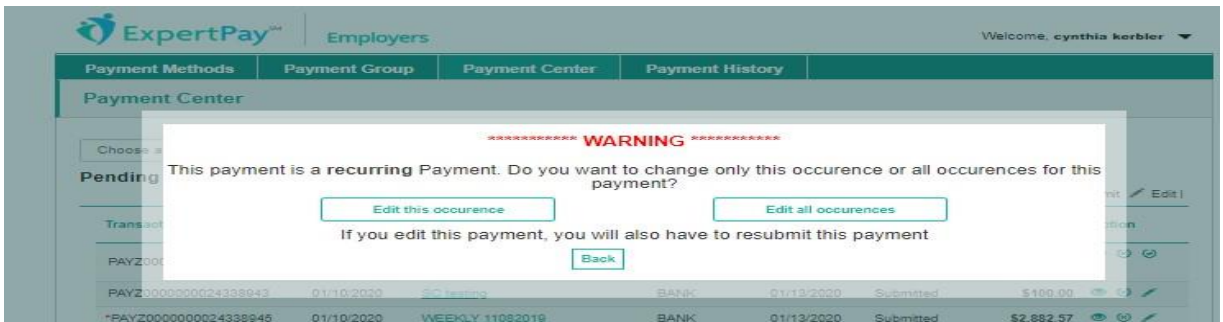
Note: The payment must be resubmitted after editing.

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
5. Click on **EDIT** button to edit

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



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.
4. 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.
5. 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"

The screenshot shows the ExpertPay Employers interface. At the top, there is a navigation bar with 'Payment Methods', 'Payment Group', 'Payment Center', and 'Payment History'. Below this is a 'Cancel Payment Verification' dialog box. The dialog contains the following information:

Transaction Number:	PAYZ0000000024338948
Payment Name:	WEEKLY 11082019
Effective Date:	01/13/20
Withholding Date:	01/13/20
Payment Method:	XXXX-XXXX-7777 JPMORGAN CHASE
Number Employee Applied:	13
Total Payment Amount:	\$2,882.57
Payment Frequency:	RECURRING

Below the table, there is a question: "This payment is a recurring Payment. Do you want to cancel only this occurrence or all occurrences for this payment?"

At the bottom of the dialog, there are three buttons: "Back to Payment Center", "Cancel this occurrence", and "Cancel all occurrences".

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.