PSERS

PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM

# PAYER EXPRESS TRAINING FOR ADDITIONAL USER SET UP AND DELETION

HOW TO MAINTAIN YOUR USERS – ADDING AND DELETING USERS

EACH EMPLOYER IS REQUIRED TO MAINTAIN THEIR USERS

PSERS

PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM

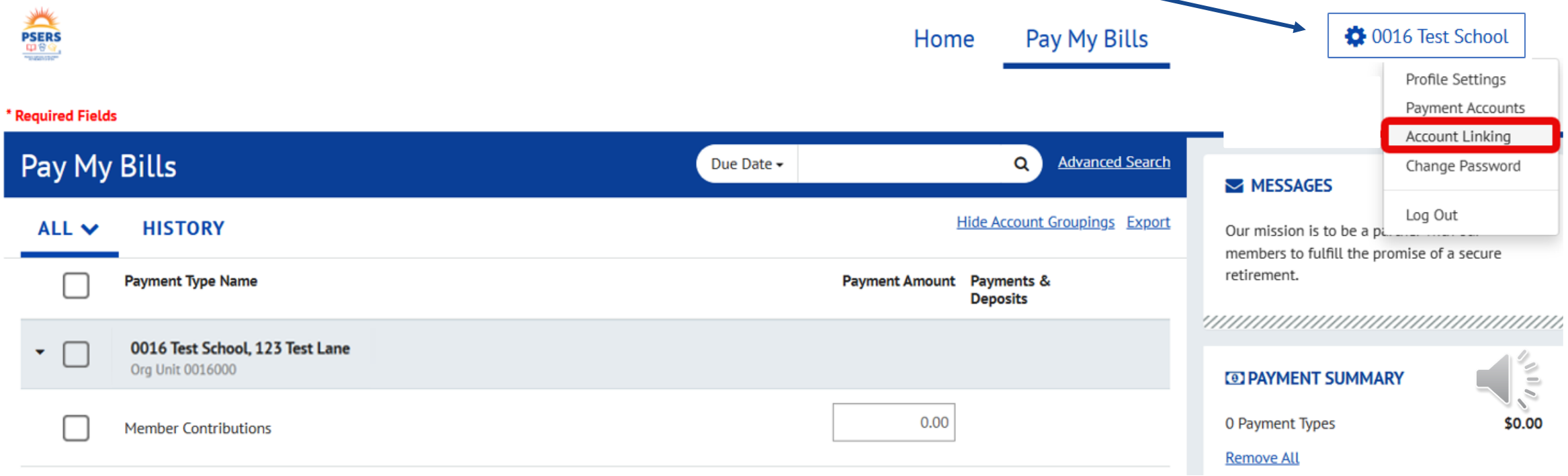
# PAYER EXPRESS TRAINING FOR ADDITIONAL USER SET UP AND DELETION CONT'D

THE PRINCIPAL USER FOR EACH EMPLOYER CAN ADD ONE ADDITIONAL USER TO THEIR PAYER EXPRESS ACCOUNT

PSERS RECOMMENDS AS BEST PRACTICE TO HAVE NO MORE THAN TWO USERS PER EMPLOYER

PSERS will monitor the number of users in Payer Express for each employer and will send notification if more than two users are identified to verify the need

**Click the gear icon next to your school's name and select <u>Account Linking</u>.**

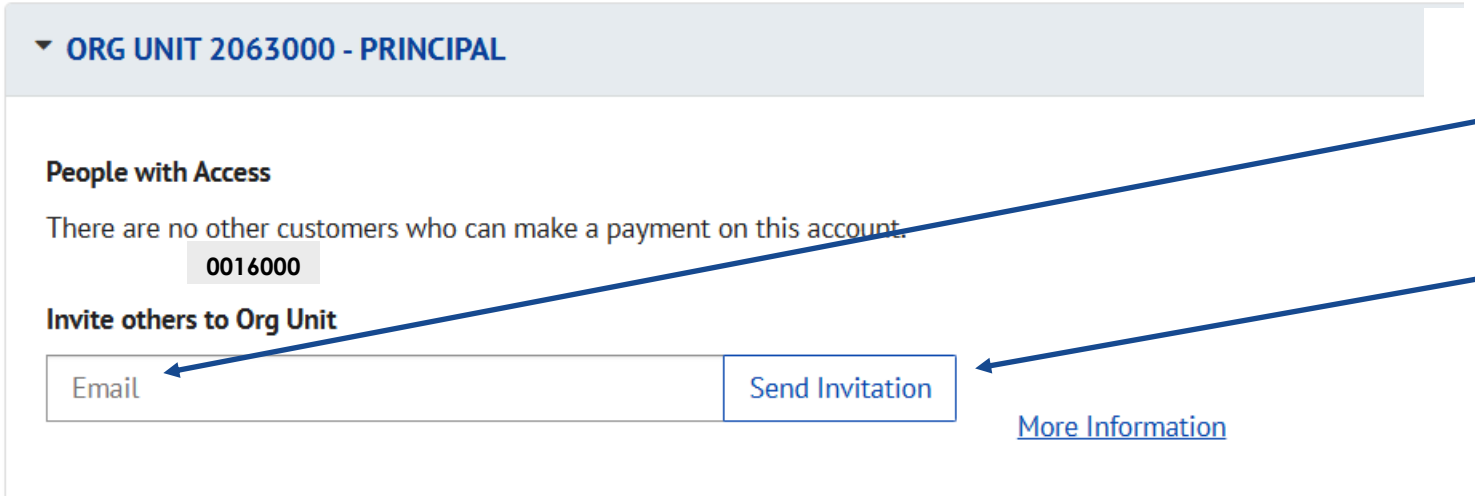


# Account Linking

* Required Fields

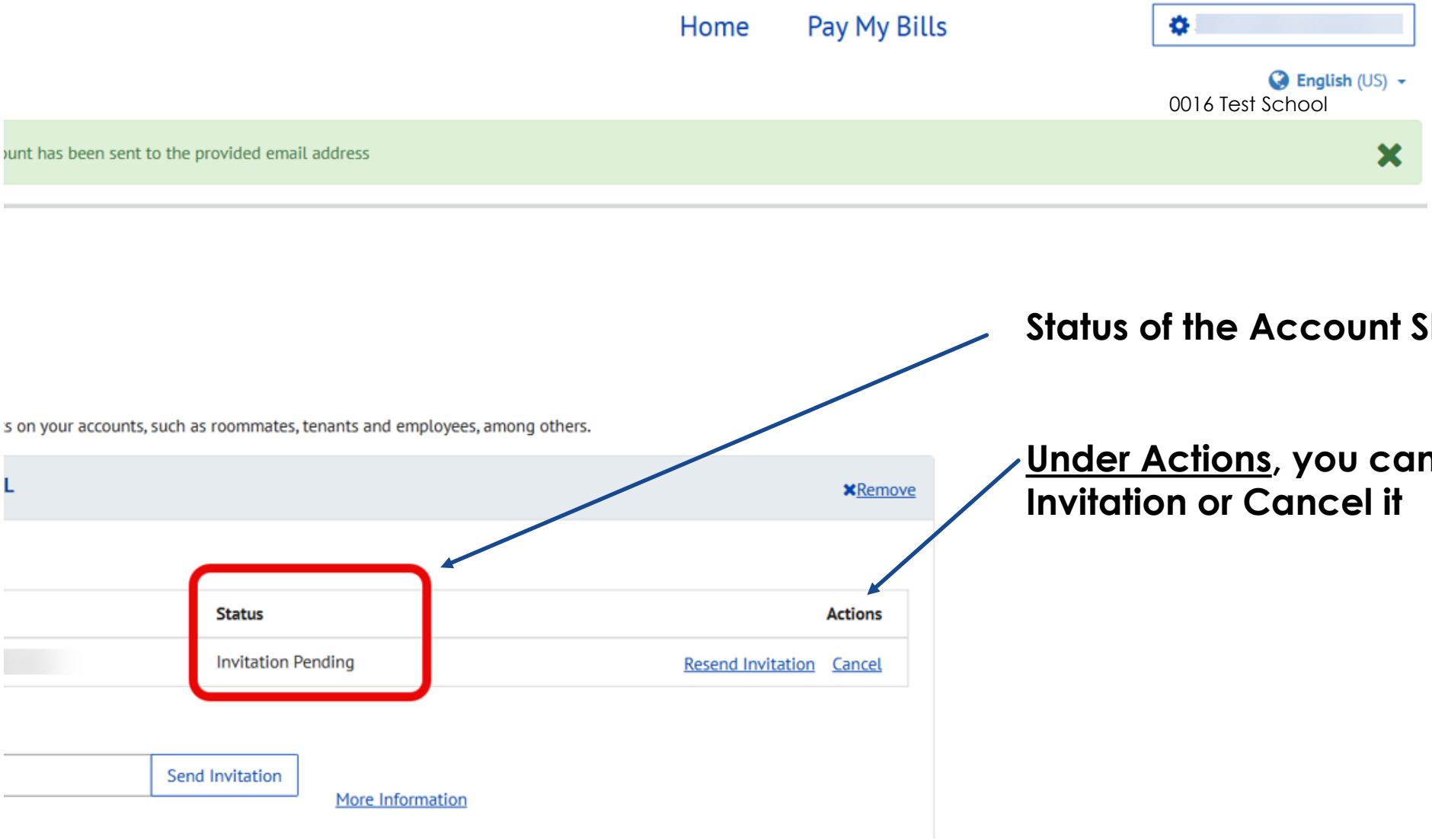
## Sharing Access to Accounts

Allow others to make their own payments on your accounts, such as roommates, tenants and employees, among others.




**Enter the email address of the additional user for your Employer and click <u>Send Invitation</u>.**

**By doing this, you are giving this individual access to your Employer's account in Payer Express.**

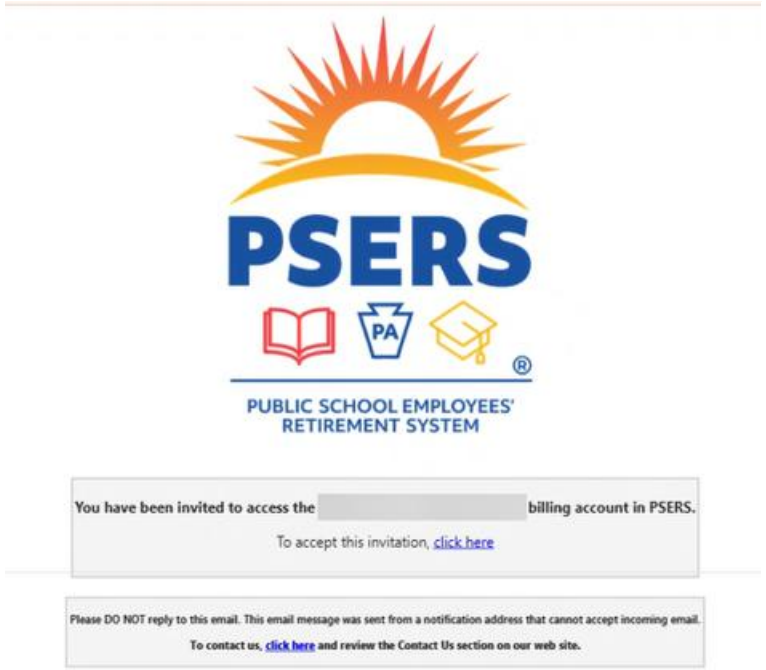



**Status of the Account Sharing / Linking**

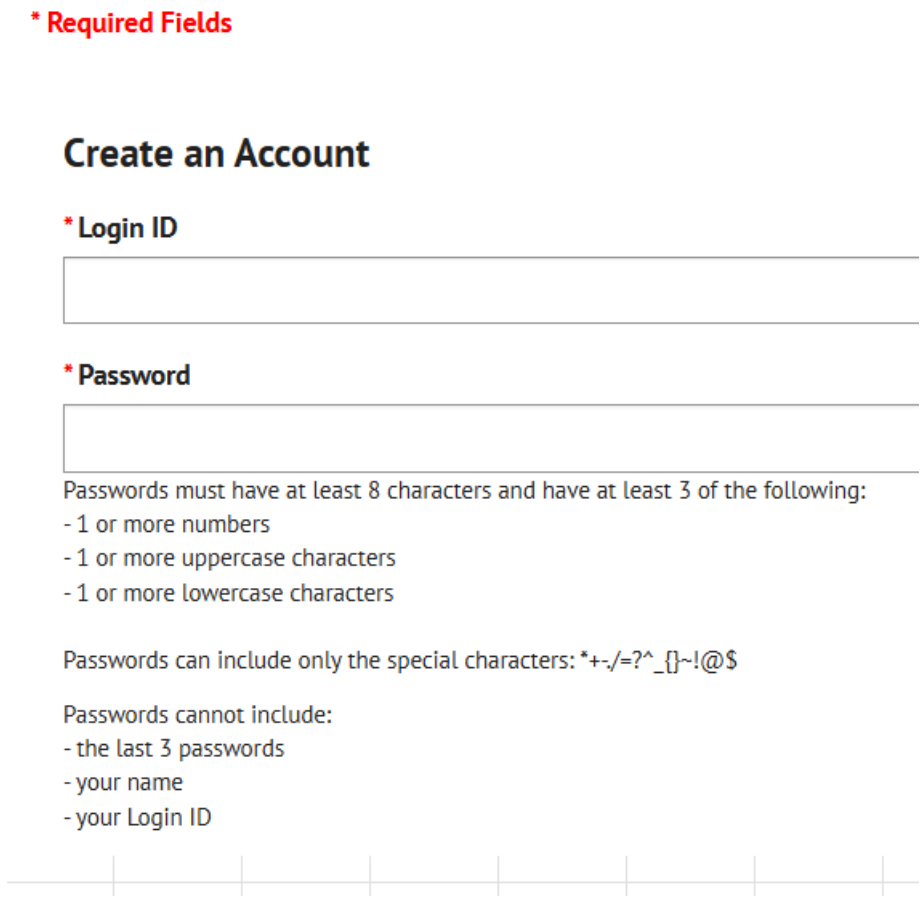
**<u>Under Actions</u>, you can Resend the Invitation or Cancel it**

# INSTRUCTIONS FOR THE PRINCIPAL USER (BUSINESS MANAGER) TO ADD AN ADDITIONAL USER (LINKED) IN PAYER EXPRESS CONT'D

## THE LINKED USER WILL RECEIVE AN EMAIL WITH INVITATION TO ACCESS THE EMPLOYER'S ACCOUNT



## THE LINKED USER WILL BE PROMPTED TO SET UP THEIR ACCOUNT

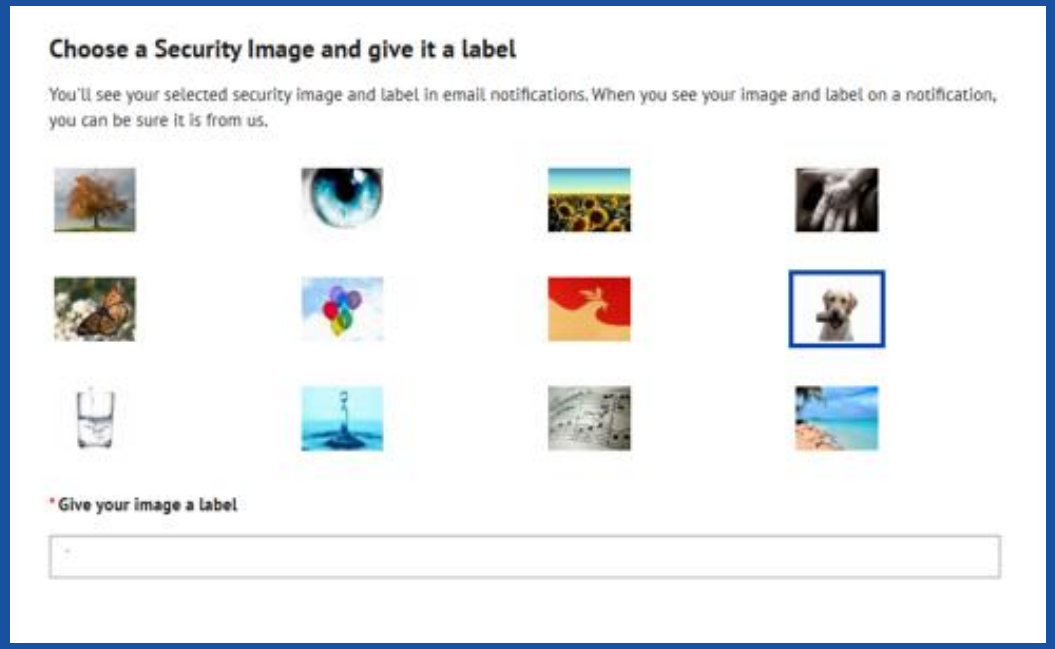



**The user ID for the Additional User (Linked) is PSERS####-LINKED (the #### represents your 4-digit employer number**

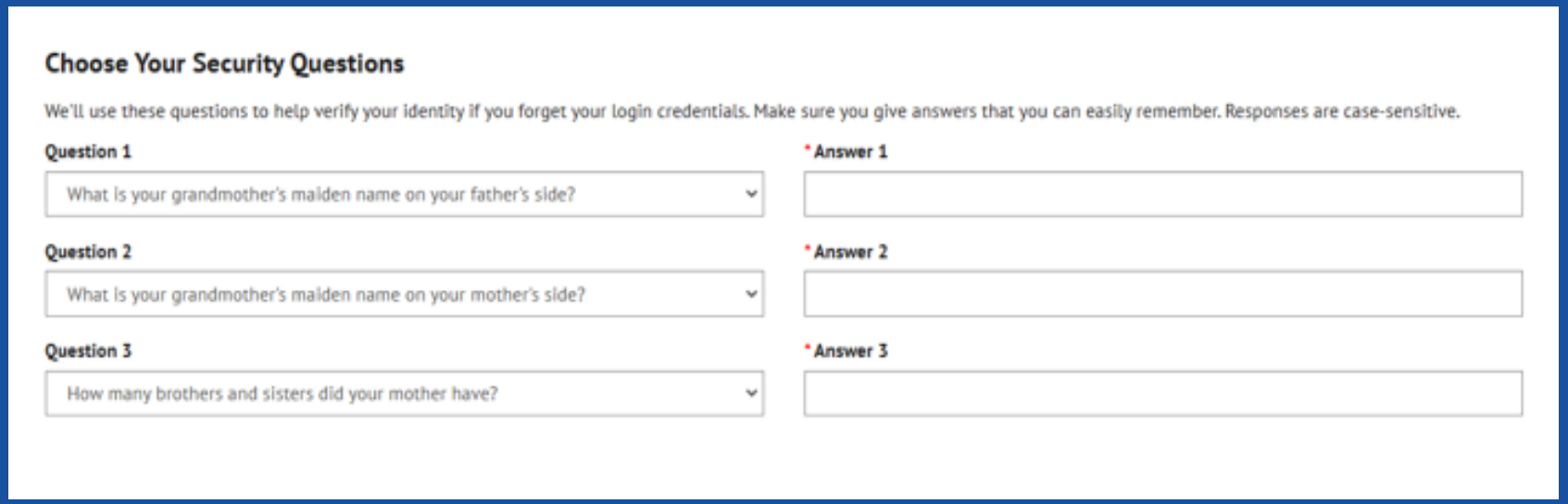
**For example, the linked User ID for 0016 is PSERS0016-LINKED**

**Create a password using the password guidelines listed**

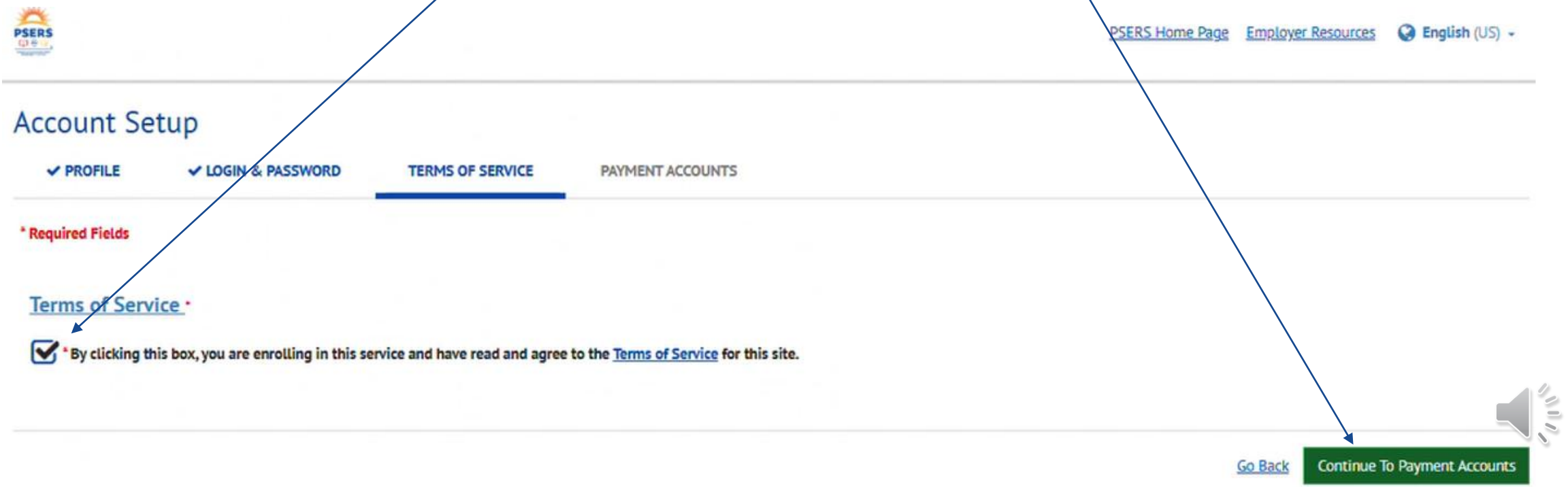
# THE LINKED USER WILL BE REQUIRED TO CHOOSE A SECURITY IMAGE AND GIVE IT A LABEL

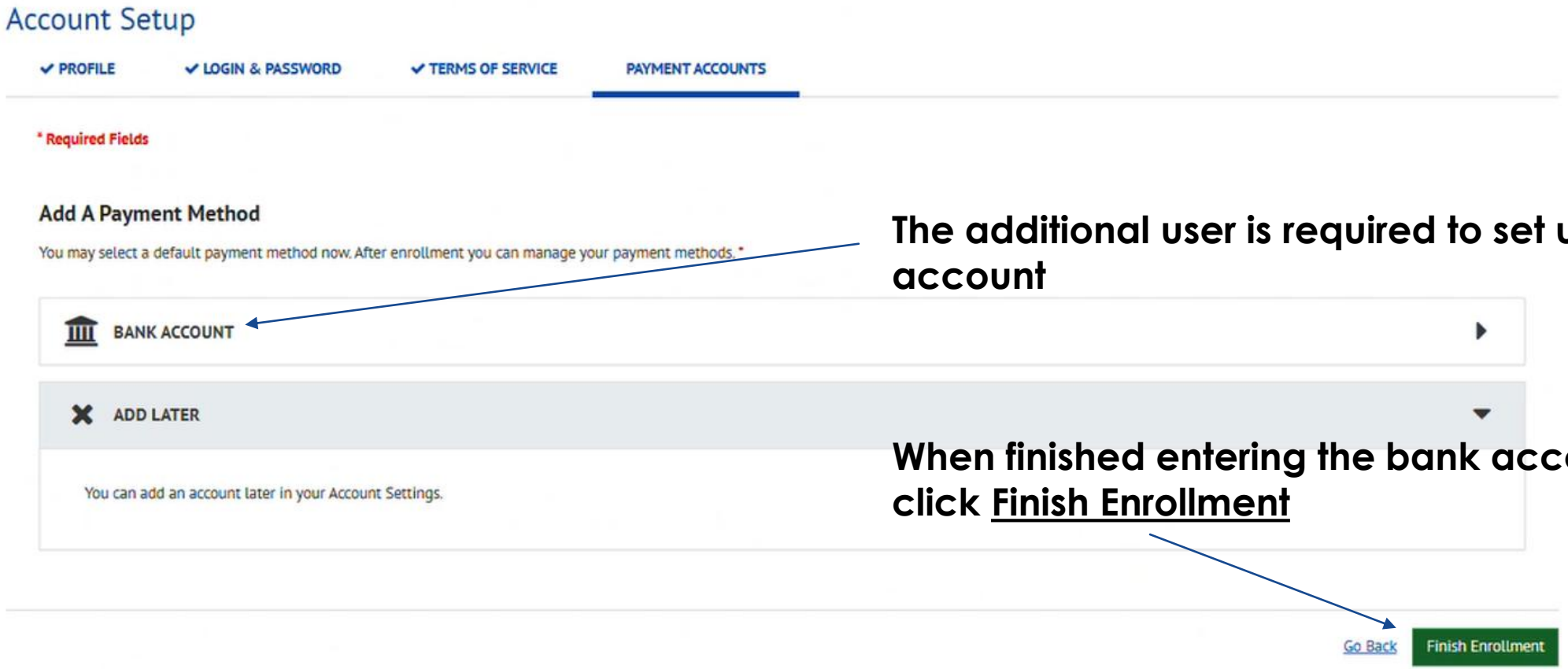


## THE ADDITIONAL USER (LINKED) WILL BE REQUIRED TO CHOOSE 3 SECURITY QUESTIONS



**Check the Terms of Service box and Click Continue to Payment Accounts.**

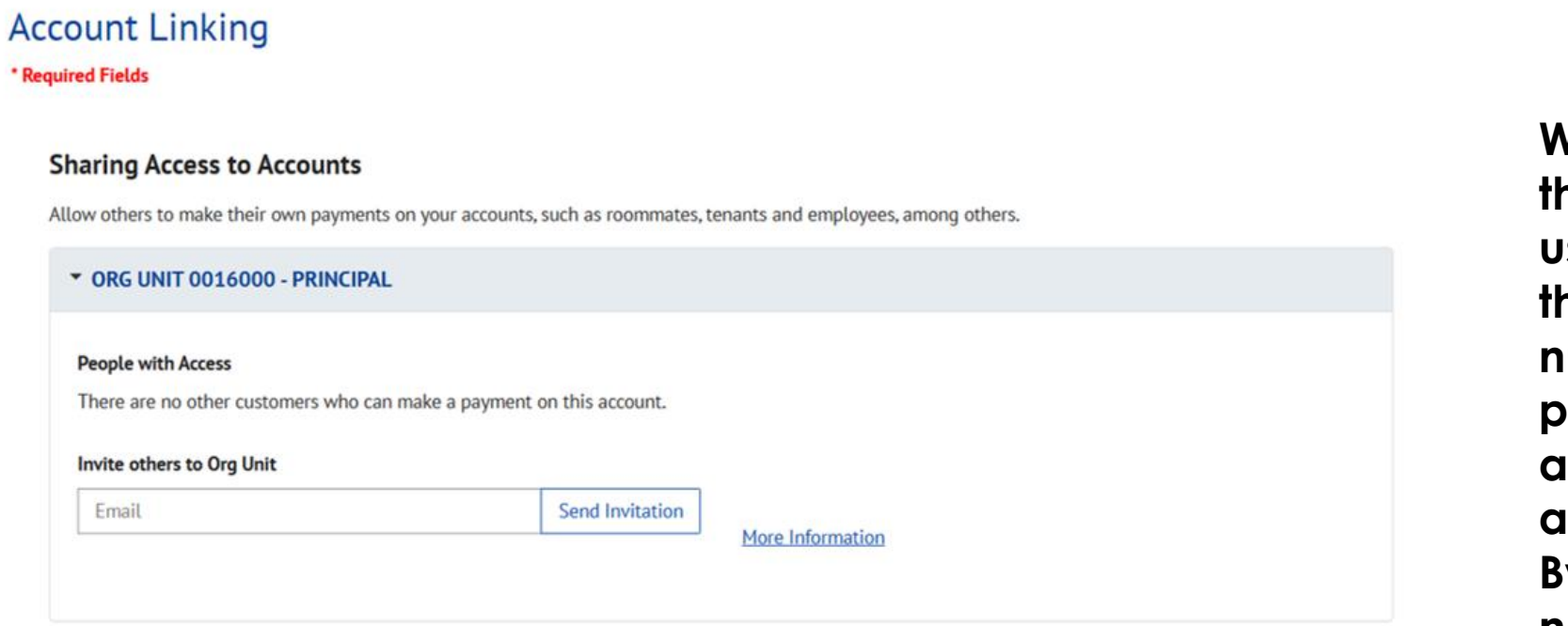





**The additional user is required to set up the bank account**

**When finished entering the bank account information, click <u>Finish Enrollment</u>**

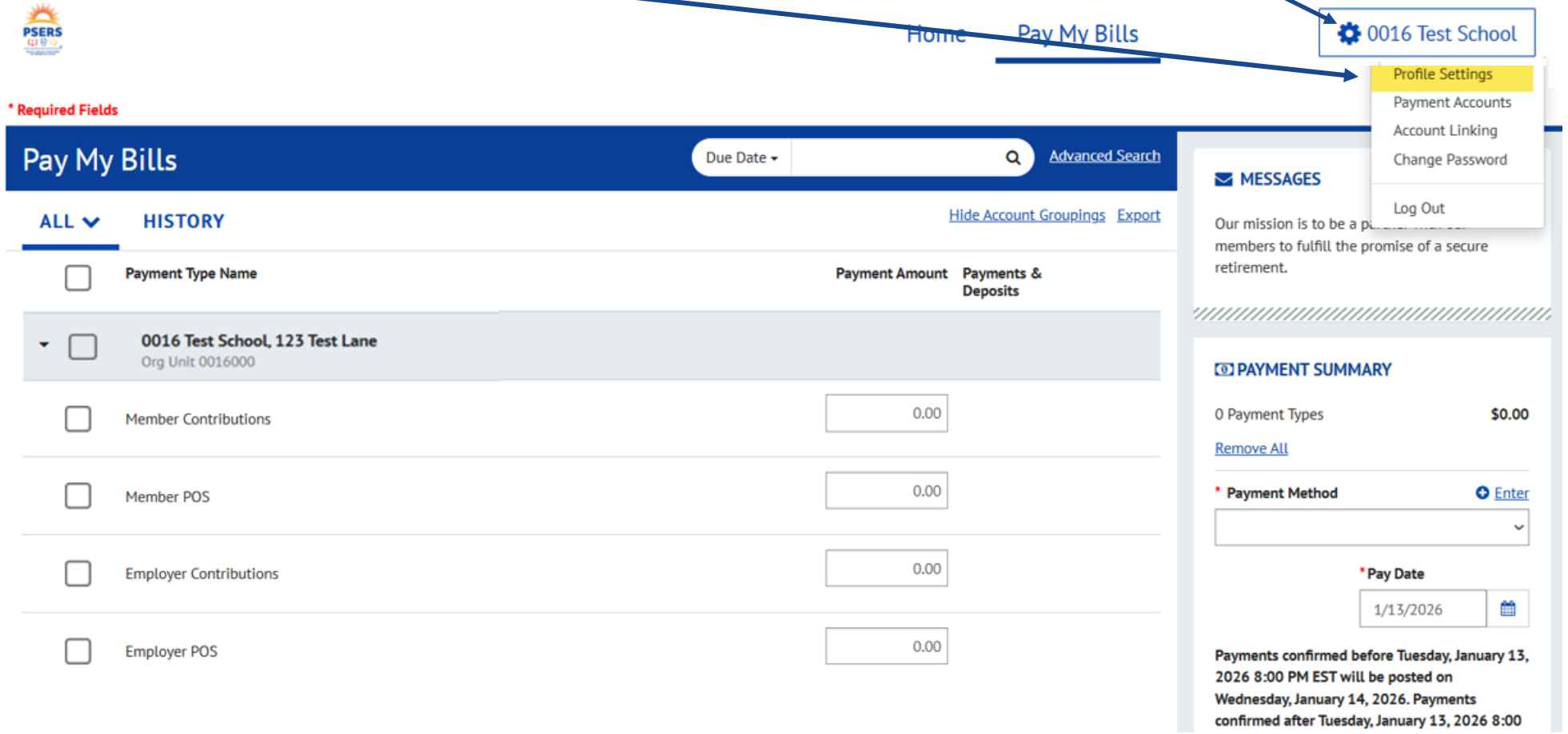
# STEPS FOR BUSINESS MANAGER TO MAINTAIN / UPDATE THE ADDITIONAL USER IN PAYER EXPRESS



**With any change to either the Primary user or Linked user, ensure that you update the contact's name, phone number, email address, password, security image and security questions associated with that login. By doing this, it allows the new employee to use the same login with their own credentials.**

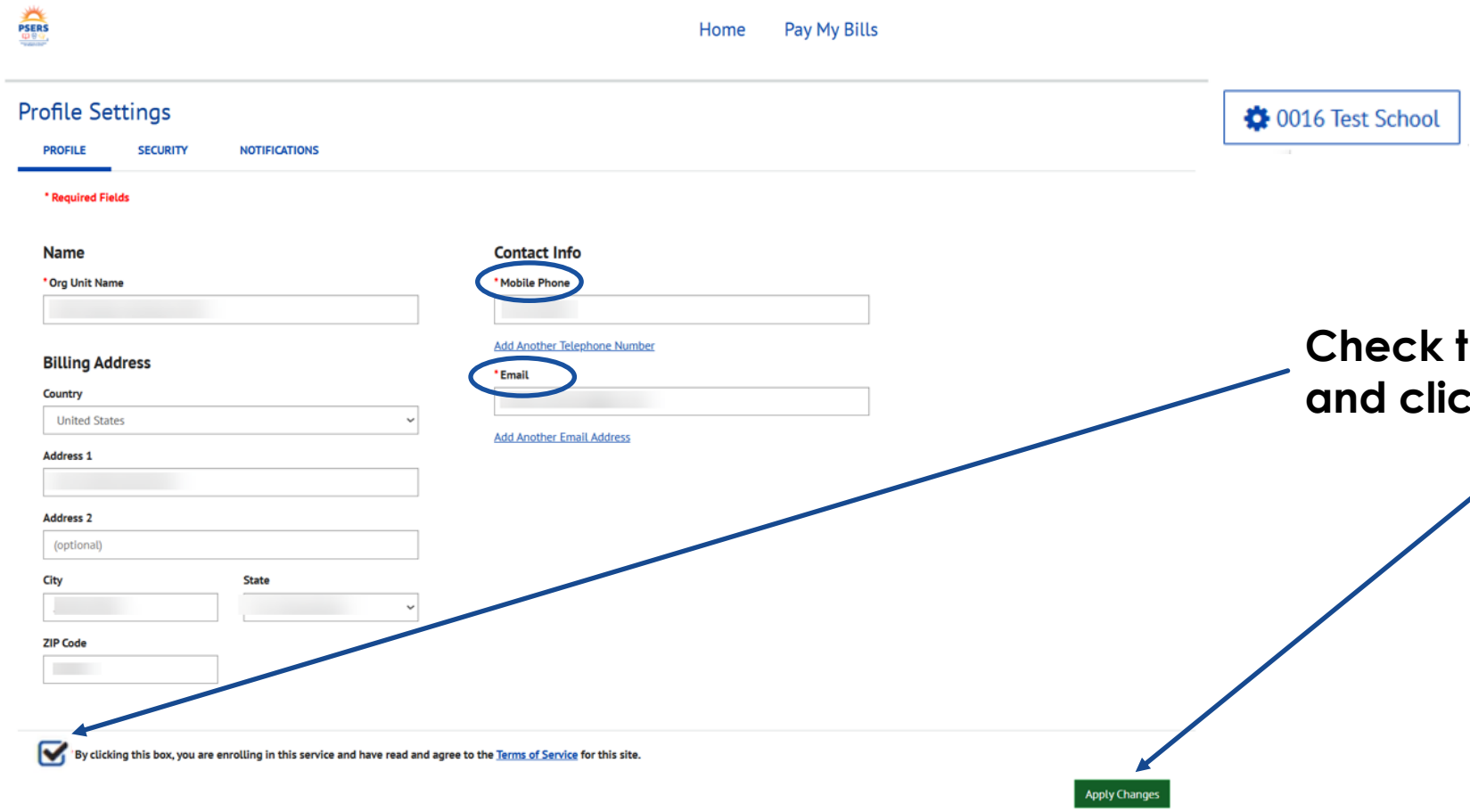
# STEPS FOR BUSINESS MANAGER TO MAINTAIN / UPDATE THE ADDITIONAL USER IN PAYER EXPRESS CONT'D

**Log into the account you wish to remove access. Click the gear and then click Profile Settings.**



# STEPS FOR BUSINESS MANAGER TO UPDATE THE ADDITIONAL USER IN PAYER EXPRESS

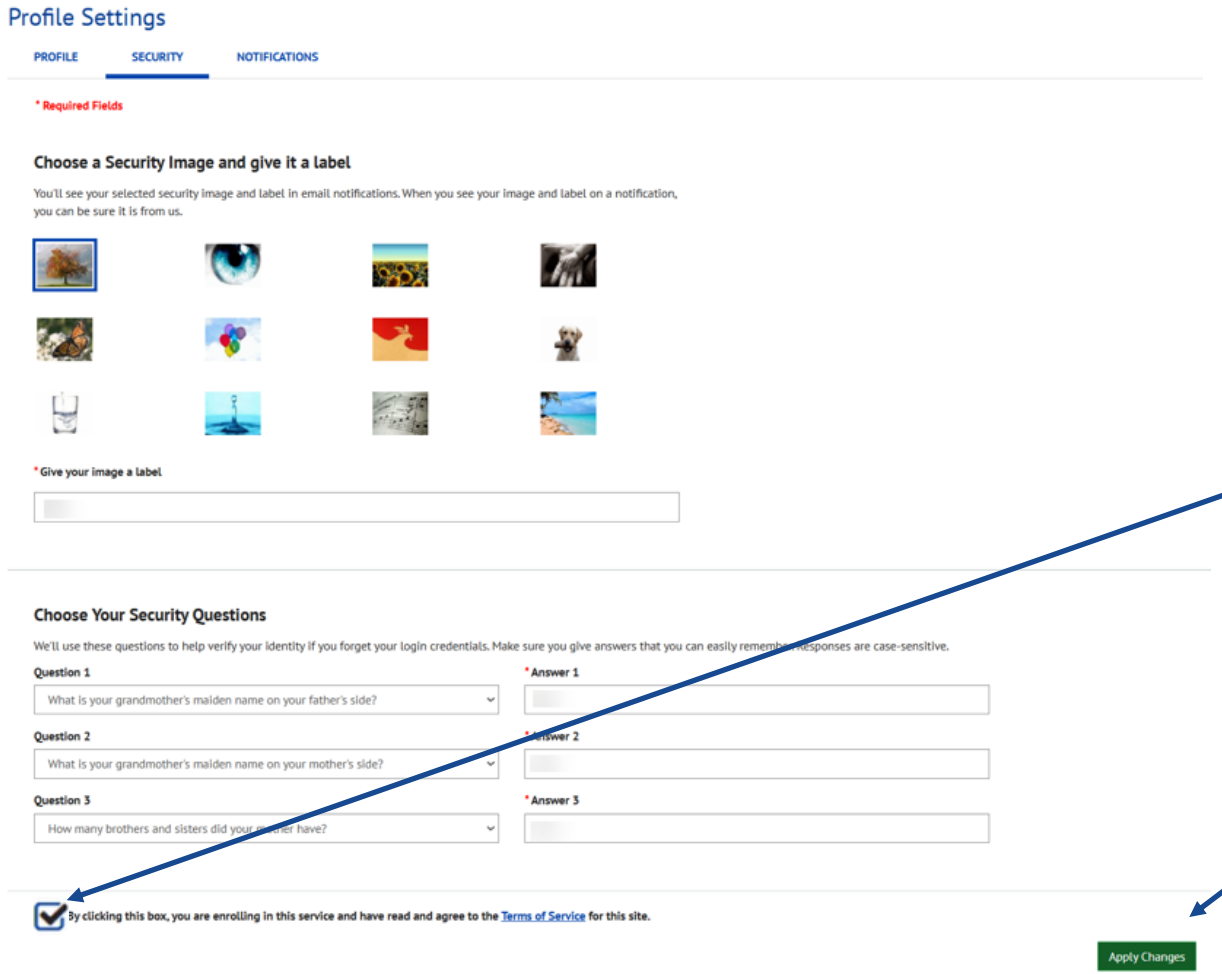
**Within Profile Settings, it defaults to the Profile screen. You will update the mobile phone and the email address under Contact Info.**




**Check the Terms of Service box and click Apply Changes.**

# STEPS FOR BUSINESS MANAGER TO UPDATE THE ADDITIONAL USER IN PAYER EXPRESS CONT'D

**Within Profile Settings, click Security to update the Security Image, Image Label, and Security Questions.**




**Check the Terms of Service box and click Apply Changes.**

# QUESTIONS???

If you have questions about the Payer Express system, contact PSERS' Employer Accounting section at RA-PSERSEMPACCT@pa.gov.

Someone from the Employer Accounting section will assist you.