

How to Create, Register, and Activate Web Employee Portals

Web employee portals are created automatically by the Creative Solutions Accounting program, but the portals must be **registered** (a Login and Password are created) and **activated** (the employee authorizes the use of the portal) before the employees can access them. This document describes different ways in which the portals can be registered and activated after the firm initially creates them.

Any of the four processes below are available when you open a client in Creative Solutions Accounting and will create the Web Employee portals. **Remember, you only need to do one of the four processes below to create the portals.** If you wish to add an additional feature now or later, you can refer to that processes' specific steps later in this guide. You only need to create, register, and activate the Web Employee portals once.

The four processes in Creative Solutions Accounting which will initiate creation of the Web Employee portals:

- a. For employee time entry: **Utilities / Remote Payroll Export** – check the box for Client Uses Web Employee
- b. For employees to view paychecks & stubs: **Utilities / Web Employee Utilities / Queue Check Information**
- c. For employees to edit their W-4 data: **Utilities / Web Employee Utilities / Queue W-4 Info Export**
- d. For employees to view their W-2s: **Utilities / W-2 Form Processing /Year** - check the box for Queue B/C/2 4-up for web employee and click **Print**

Once one of these four steps has been completed, you must go into CS Connect to transmit the data and create the portals. When you open CS Connect, the option associated with the step you have taken above will automatically be marked within the Purpose of this Call - Web Employee section. You will click the **Call Now** button and the information will be transmitted as appropriate.

After the portals are created, choose one of the three ways to register and activate the portals:

- A. Employees register and activate themselves
 - a. **Pros:** Employees create their own logins and passwords; no extra data entry needs to be done by firm or client
 - b. **Cons:** Employees may need help with process; may not receive their emails;
- B. The firm allows the client to register the employees and the employees activate themselves
 - a. **Pros:** Client creates standardized logins and passwords; no issue with the initial email not being received
 - b. **Cons:** Client must do the data entry
- C. The firm registers the employees and the employees activate themselves
 - a. **Pros:** Firm creates standardized logins and passwords; no issue with the initial email not being received
 - b. **Cons:** Firm must do the data entry

Regardless of the method you use to register and activate the portals, you should provide an explanation of the features the employees will use in their Web Employee portals and how the registration and/or activation process will work. The only email which is automatically sent to the employees is the Activation email which they will receive after the registration process is completed. For detailed instructions on each of the Registration and Activation processes, refer to the appropriate link below:

- A. [Employees Register and Activate Themselves](#)
- B. [Client Registers and Employees Activate](#)

C. [Firm Registers and Employees Activate](#)