

Employee Portal



- **Registration**

PURPOSE: Provide employees with a secure electronic means of retrieving their documents (Check Stubs, W2s, and 1095Cs).

Additional Uses: Review W4 selections, address, and phone numbers.

TO REGISTER:

1. Have the Payroll Clerk add your personal email to your employee record – after the email is added you will receive an email from support@financial-intel.com in about 20 minutes from the time the email is added.

! Hint! Use your personal email – if you leave this employer you will want to retain the ability to access your data!



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2. Click the link contained in the email – the link in your email will be different; the registration screen for your portal will open

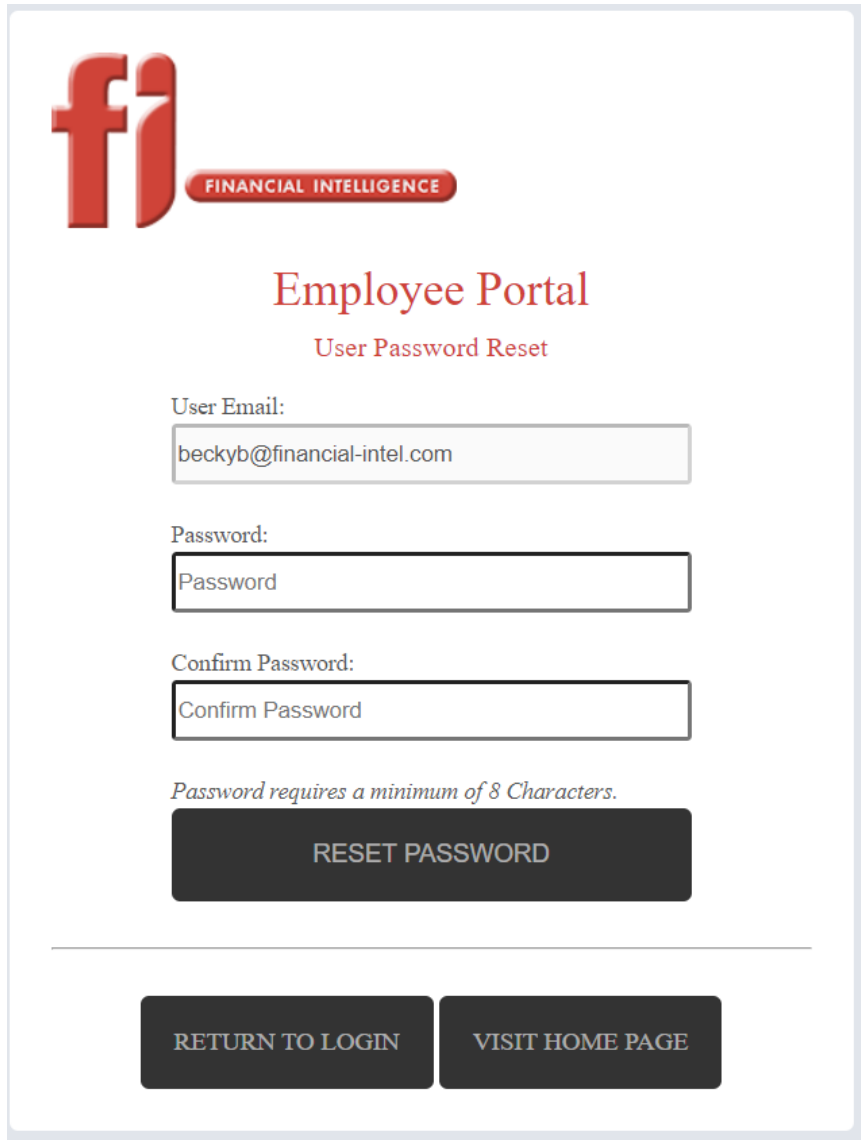
3. Enter a password and verify the password in the fields, then click the **RESET PASSWORD** button



Quick Tip!

The password must be at least 8 characters long and must contain at least one of the following

1. *Uppercase Letter*
2. *Lower Case Letter*
3. *Number*
4. *Symbol*



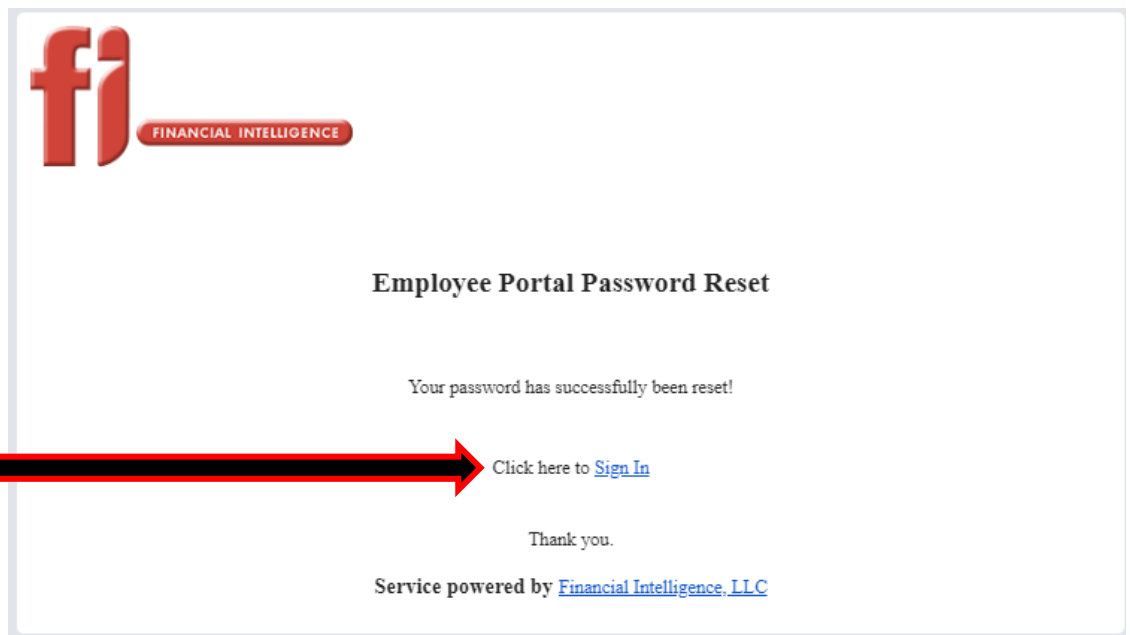
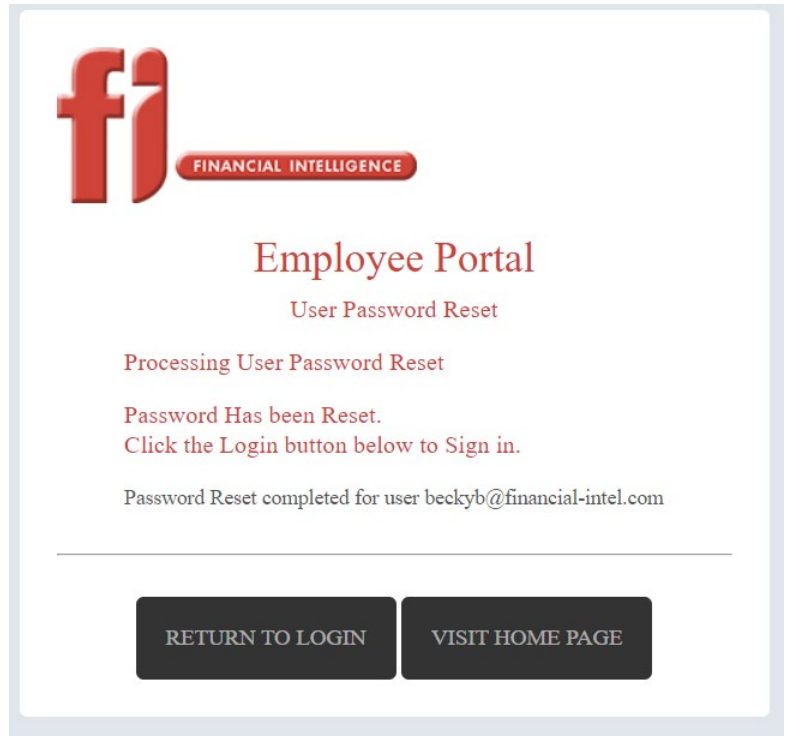
The screenshot shows the 'Employee Portal' login page with a 'User Password Reset' section. At the top left is the 'fi FINANCIAL INTELLIGENCE' logo. The title 'Employee Portal' is in a large serif font, with 'User Password Reset' below it in a smaller sans-serif font. The form includes three input fields: 'User Email:' with the value 'beckyb@financial-intel.com', 'Password:' with the placeholder 'Password', and 'Confirm Password:' with the placeholder 'Confirm Password'. Below the fields is a note: 'Password requires a minimum of 8 Characters.' A large dark button labeled 'RESET PASSWORD' is centered below the note. At the bottom of the page are two dark buttons: 'RETURN TO LOGIN' and 'VISIT HOME PAGE'.

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4. A verification screen will appear, you can close this – as another link will be emailed.

Then in 5 to 10 minutes you will receive a link to the Employee portal. Click the **SIGN IN** link.



Employee Portal

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5. Save or add this link to your favorites for easy access (your URL will be different) – or keep this email so you can sign in from it again

6. Use the email you registered with and the password you set for your portal, then click the LOGIN button

A screenshot of the Employee Portal login page. At the top left is the 'fi' logo with 'FINANCIAL INTELLIGENCE' in a red pill-shaped box. Below the logo, the text reads 'Employee Portal Your County' in a large red serif font, followed by 'Account Management' in a smaller red sans-serif font. There are two input fields: 'Email Address:' with a text box containing 'Email Address', and 'Password:' with a text box containing 'Password'. Below these is a dark grey button with the word 'LOGIN' in white. At the bottom, there is a link: 'Forgot Your Password? [Click here](#)'.

fi
FINANCIAL INTELLIGENCE

Employee Portal
Your County

Account Management

Email Address:
Email Address

Password:
Password

LOGIN

Forgot Your Password? [Click here](#)

Employee Portal



- **Signing In / Using the Portal**

PURPOSE: Provide employees with a secure electronic means of retrieving their documents (Check Stubs, W2s, and 1095Cs).

Additional Uses: Review W4 selections, address, and phone numbers.

TO SIGN IN:

1. Open the link for the portal
2. Enter your email address
3. Enter your portal password
4. Click the **LOGIN** button

A screenshot of the Employee Portal login page. At the top left is the 'fi FINANCIAL INTELLIGENCE' logo. The main heading reads 'Employee Portal Your County Account Management'. Below this are two input fields: 'Email Address:' followed by a text box containing 'Email Address', and 'Password:' followed by a text box containing 'Password'. A dark grey 'LOGIN' button is positioned below the password field. At the bottom, there is a link that says 'Forgot Your Password? [Click here](#)' and a horizontal line below it.

Employee Portal

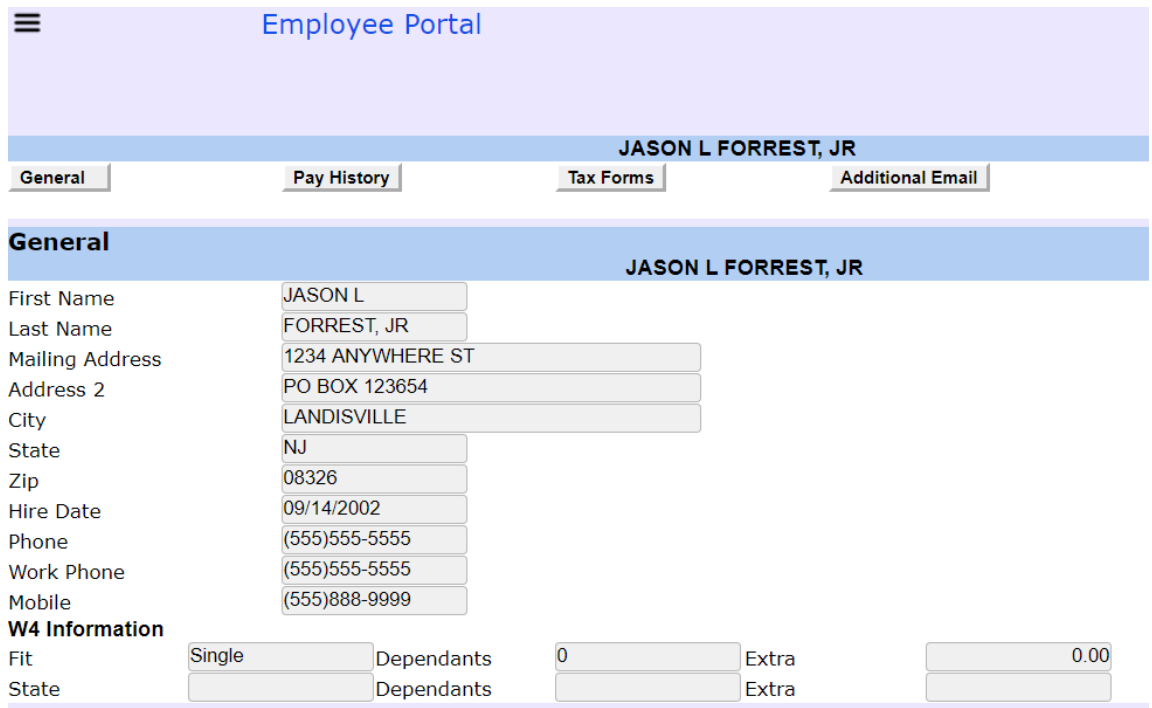
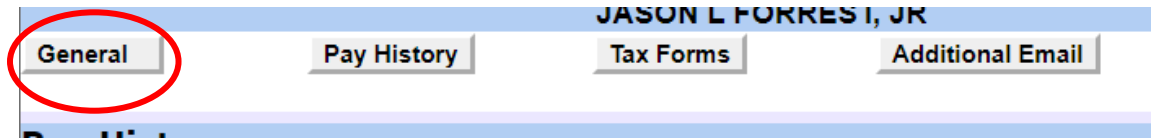


- **Signing In / Using the Portal**

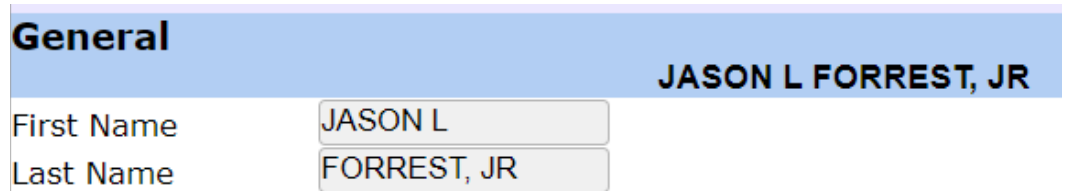
USING THE PORTAL:

1. General Screen – this screen will display your personal information including tax information

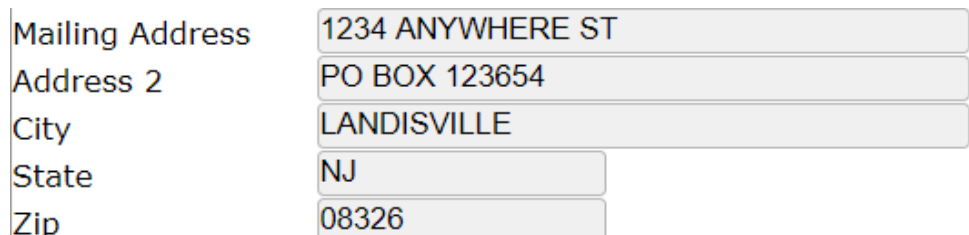
a. The portal will open to the General screen



b. You will be able to see your name



c. Address



Employee Portal



- Signing In / Using the Portal

d. Hire Date

Hire Date	09/14/2002
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e. Phone Numbers

Phone	(555)555-5555
Work Phone	(555)555-5555
Mobile	(555)888-9999

f. W4 information – contains Federal Income

W4 Information					
Fit	Single	Dependants	0	Extra	0.00
State		Dependants		Extra	

2. Pay History Screen – This screen will show the check listing for all of the checks paid to you on the FI system (new installations will have “summary check” listings for W2 and report purposes you will need to use the check stub you received on the old system)

JASON L FORREST, JR

General
Pay History
Tax Forms
Additional Email

JASON L FORREST, JR

General
Pay History
Tax Forms
Additional Email

Pay History

#	End Date	Check Date	Check Number	Gross Amount	Net Amount	Print Stub
1						⌘
2						⌘
3						⌘
4						⌘
5						⌘
6						⌘
7						⌘
8						⌘
9						⌘
10						⌘
11						⌘
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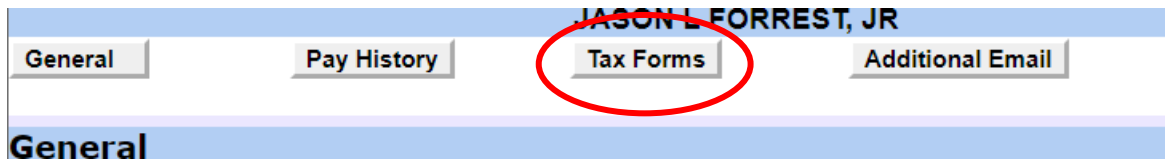
a. Check information will be listed in the grid, click the PRINT STUB action button next to the check you want to view or print

Employee Portal



- Signing In / Using the Portal

3. Tax Forms – this screen will allow the reprint of any W2s or 1095Cs created on the FI system

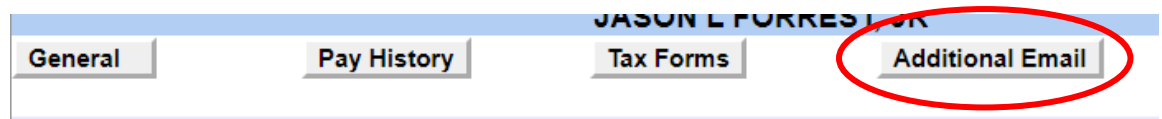


a. The year of the tax forms will be listed in the grid



b. Click the button (either W2 or 1095) of the document you want to view / reprint

4. Additional Email – this screen will allow you to change your email address



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Additional Emails JASON L FORREST, JR

Current Email	<input type="text" value="beckyb@financial-intel.com"/>
New Email	<input type="text"/>
Verify Email	<input type="text"/>
New Email	<input type="text"/>
Password	<input type="password"/>
Verify Email	<input type="text"/>
Password	<input type="password"/>

Commit Email Change

- Enter the new email address
 - Verify the new email address
 - Enter a new password
 - Then Verify the new password
 - Click the **COMMIT EMAIL CHANGE** button
5. Make sure you logout everytime you are finished using the portal (there is a built in time that will auto-log you out of the portal after the portal is idle for a period of time). To logout

- Click the three lines to the left top of the screen, a menu will open



- You can either click the logout symbol at the top right of the menu or
- You can click the LOGOFF menu item

