



Employee Self-Service for Schools & Academies

How to ... Set Your E-Form Preferences

Purpose:

This guide will show you how to set up your E-Form Preferences on the Employee Self- Service (ESS) system.

Important Notes:

ESS allows you to view and download electronic versions of your payslip and P60 (if relevant) each month.

If you set your E-Form Preferences you will also receive your payslip (and P60 if relevant) via an email which you can easily access.

It is very important that you set your E-Form Preferences before you leave your employment as your access to ESS will be end dated from your leaving date, which could prevent you from accessing your final payslip via ESS and your final P60.

When you set your E-Form Preferences, you will only receive email payslips for the current month onwards i.e. you will not automatically receive any previous payslips which you see on ESS.

To set your E-Form Preferences

Click on the downward arrow on the person icon at the right of your toolbar on the Self Service Homepage





- Select **E-Form preferences**. The following screen is displayed:

E-form preferences ✕

i The payslip/P60 passwords can only use the characters A-Z, a-z, 0-9, space or ! " \$ % ^ & * () - _ + [] { } ? , . ; @ # ~ / | \ < > = ' ` :

Payslip options

Email payslip

P60 options

Email P60

- Click on the **'Email payslip'** box
- Additional fields for 'Email address', 'Password for payslip' and 'Confirm password' will now appear on the screen
- If you already have a personal address held in the system against your record, this may be shown; you can amend this to a different email if required. If the **email address** field is blank, please enter this. It is advised you use a personal email address. Please note AOL email addresses are not permitted as the supplier deletes the email payslip attachment!
- Enter the same password in the **'Confirm password'** field.
- Tick the **'Email P60'** box.
- Tick the **'Use the same email and password for P60's'** box.
- Your completed screen should look similar to this:

E-form preferences ✕

i The payslip/P60 passwords can only use the characters A-Z, a-z, 0-9, space or ! " \$ % ^ & * () - _ + [] { } ? , . ; @ # ~ / | \ < > = ' ` :

Payslip options

Email payslip

Email address •
testemployee@yahoo.co.uk

Password for payslip •
.....

Confirm password •
.....

P60 options

Email P60

Use the same email and password for P60's



- Once you have set your E-Form Preferences, click on **Save**



Resetting Your Password

To change your E-Form Preferences password, you can rewrite a new password in to the required sections and confirm this at any time.

Note: your E-Form Preferences password is separate to the password you use to log in to Schools IdP and will not change if you have to reset your IdP password.

Notifications

You will receive an email notification to confirm that you have set up your E-Form Preferences to receive your payslip and/or P60 by email.

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