User Guide

EA Form (Admin)

How to Retrieve/Delete/Release/Setup EA Form as an Admin

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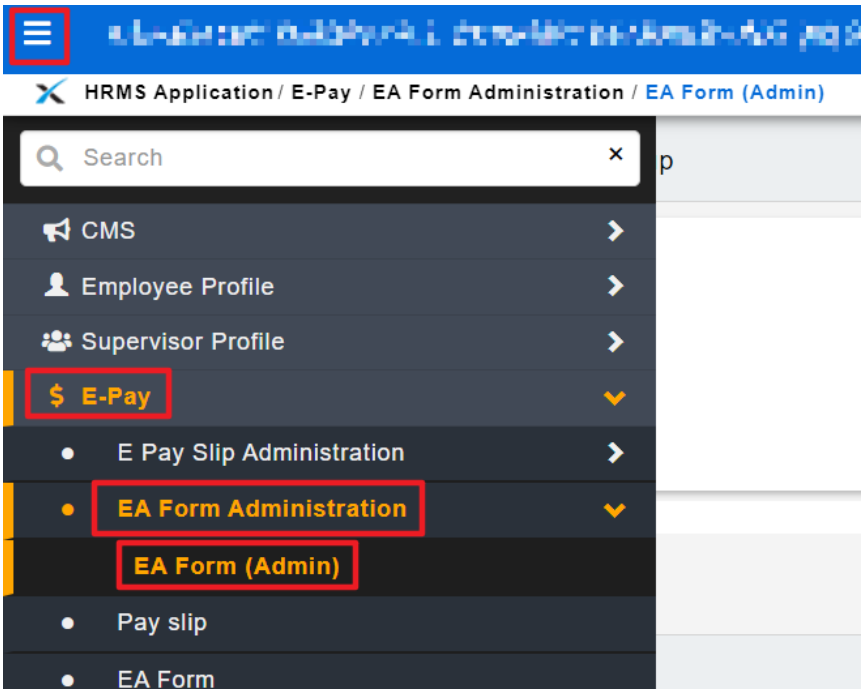
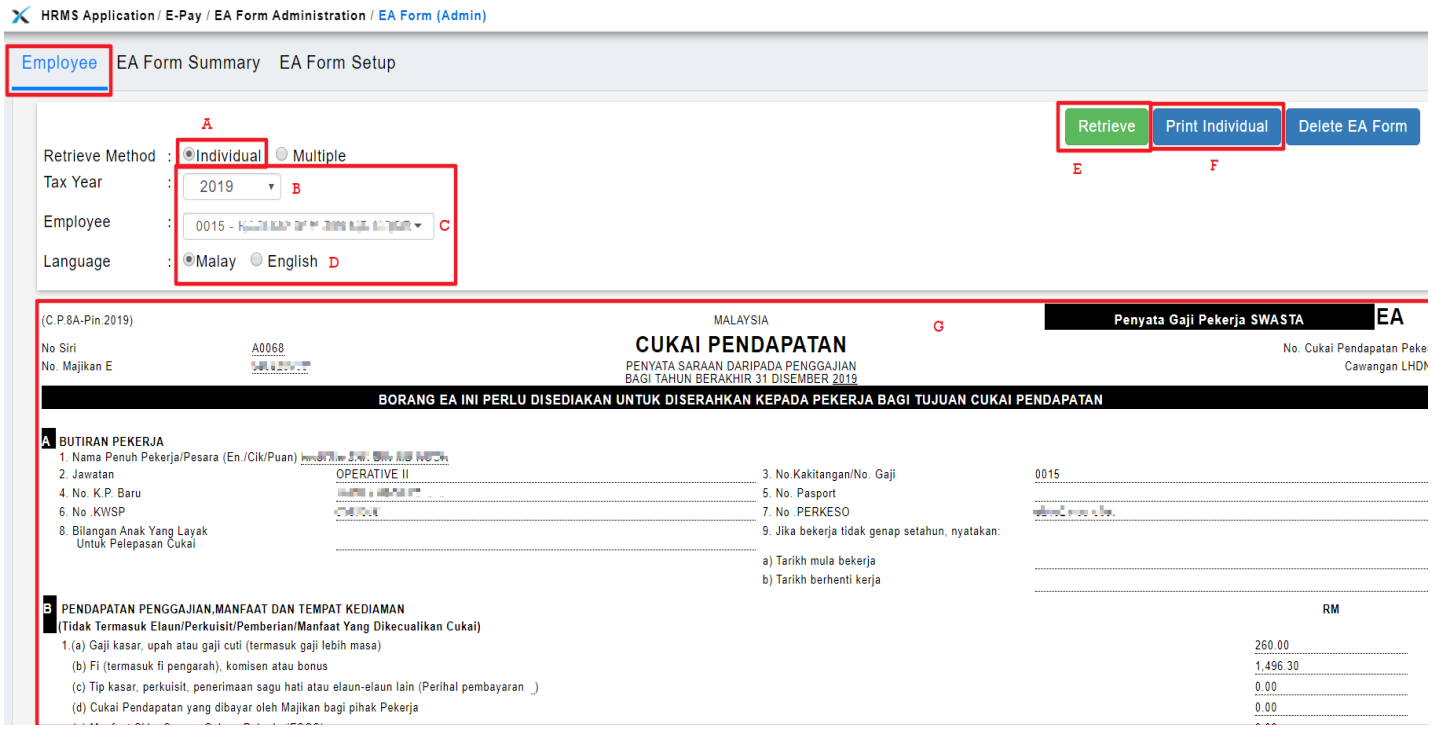
TO RETRIEVE EMPLOYEES' EA FORM

1. Click on ☰ at the top left side -> E-Pay -> EA Form Administration -> **EA Form (Admin)**.

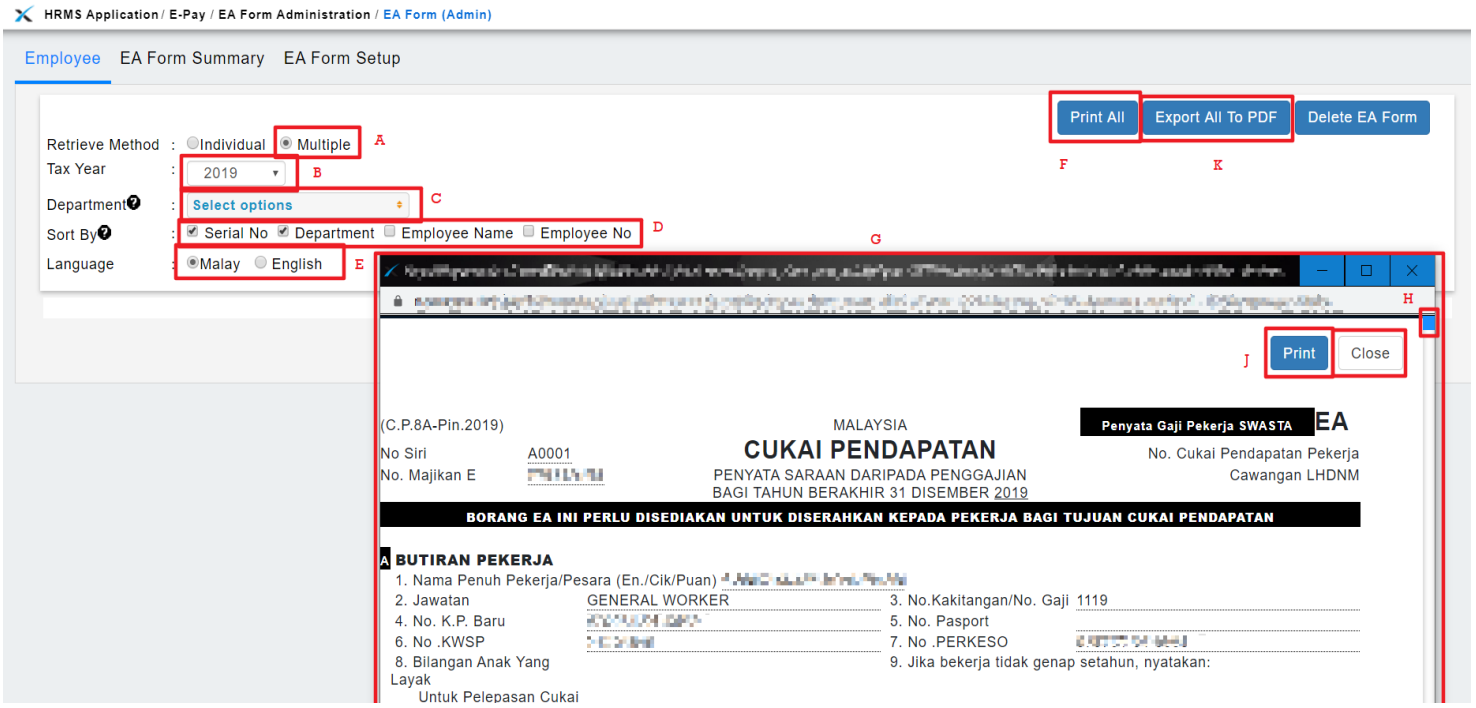


2. Click on "Employee" tab.
   i. By Individual:



a) Select (A) to retrieve the EA Form by Individual.
b) Select (B) to choose which Tax Year.
c) Select (C) to choose the employee.
d) Select (D) to choose on the EA Form Language.
e) Click on (E) to retrieve the Individual EA Form under (G).
f) Click on (F) to Print out the employee's EA Form.

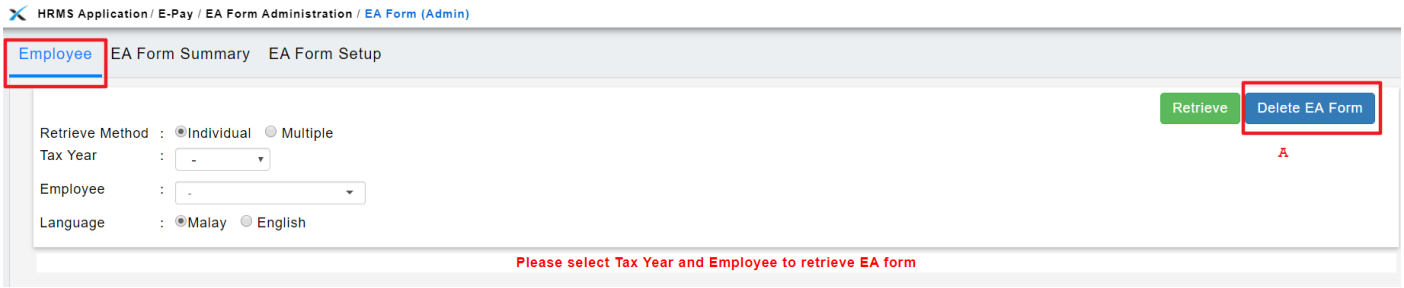
ii. By Multiple:



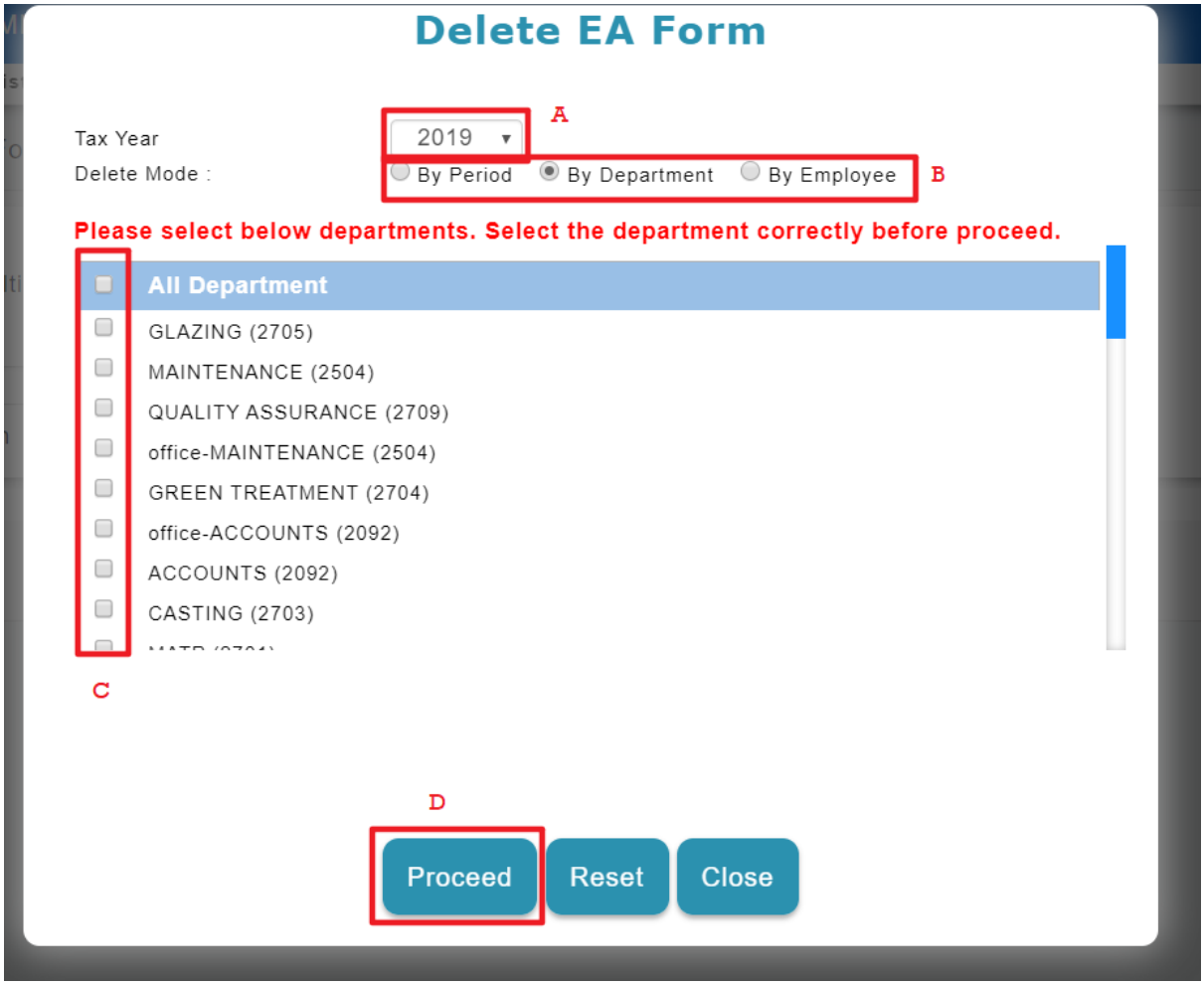
a) Select (A) to retrieve the EA Form by Multiple.
b) Select (B) to choose which Tax Year.
c) Select (C) to filter by Department.
d) Select (D) to perform EA Form Sorting.
e) Select (E) to choose on the EA Form Language.
f) Click on (F) to Print Preview All Employees' EA Form as in (G).
g) Adjust the scroll bar (H) to go through the employees' EA Form.
h) Click on (J) to Print out all the EA Form or to Close the window.
i) Click on (K) to Export All EA Form into PDF format.

TO DELETE EMPLOYEES' EA FORM

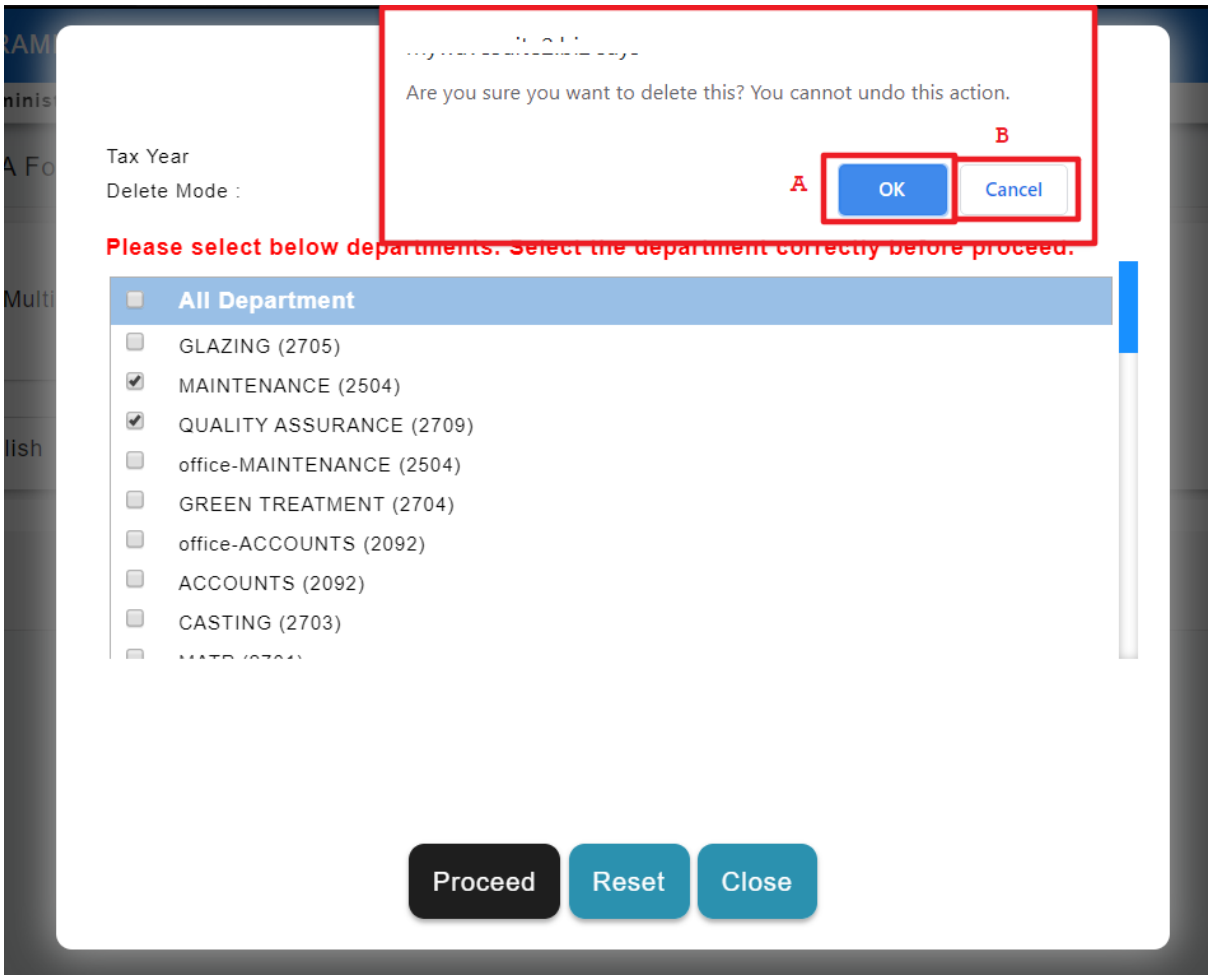
1. Click on (A) to delete any employees' EA Form.



2. Select (A) for the Tax Year.
3. Select (B) for the Delete Mode/Method.
    a. By Period: The EA Form for the entire Tax Year selected will be deleted
    b. By Department: Only the EA Form for selected Department(s) will be deleted
    c. By Employee: Only the EA Form for selected Employee(s) will be deleted
4. Select (C) for the Department/Employee's EA Form to be deleted.
5. Click on (D) to Delete the EA Form for the selected Method.

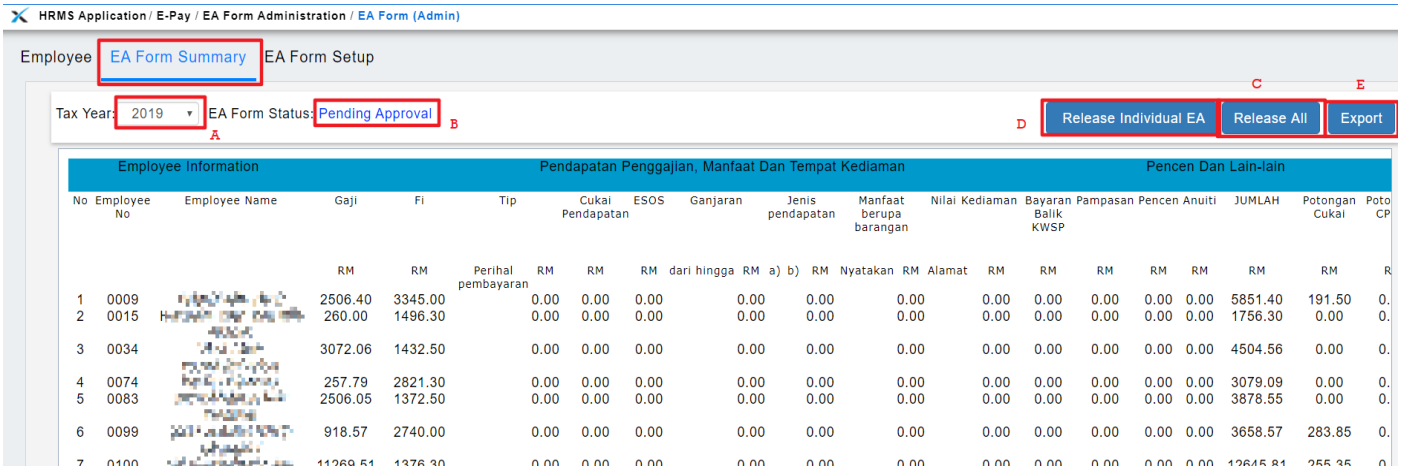


6. Click on (A) to **confirm** on the Delete action.
7. Click on (B) to **back** to the selection page.

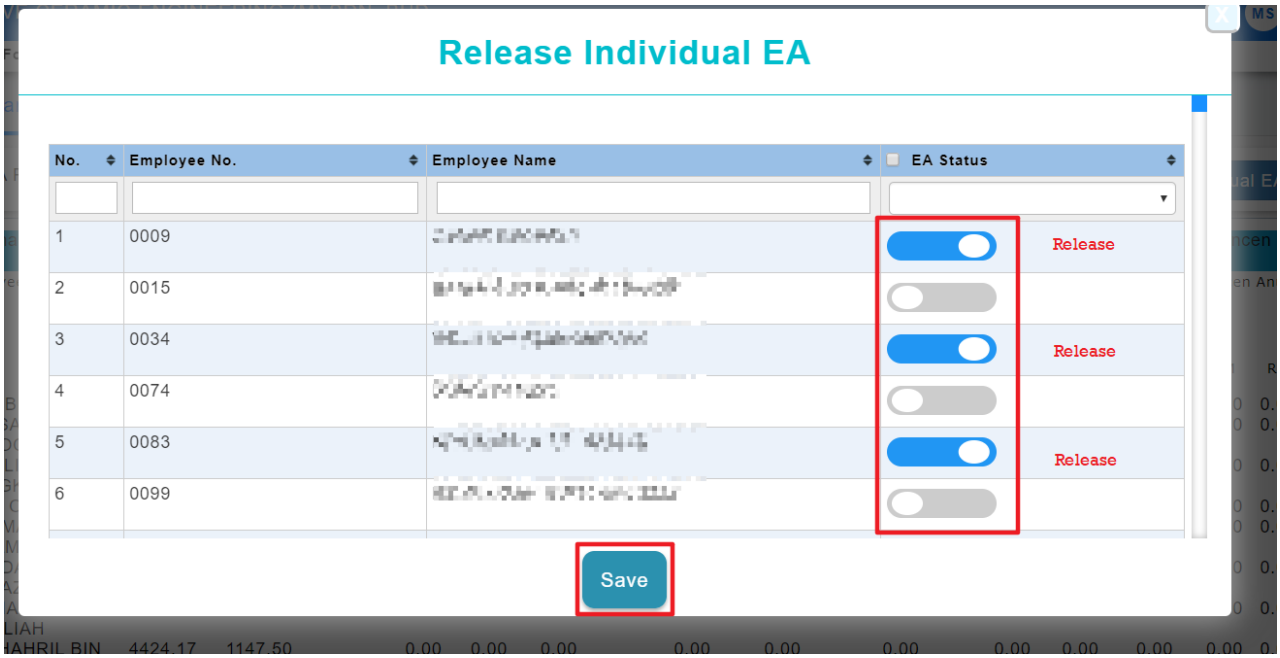


TO VIEW EA FORM SUMMARY AND RELEASE TO EMPLOYEE(S)

1. Click on "EA Form Summary" tab

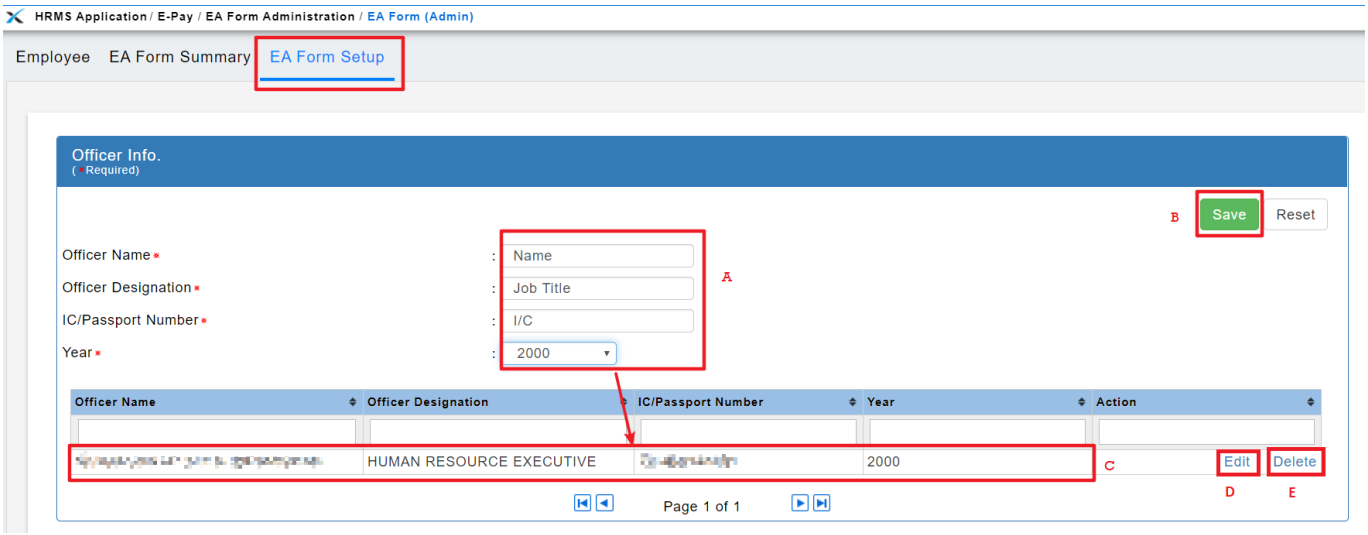


a) Select (A) to choose the Tax Year.
b) Overall EA Form Release Status will show in (B).
c) Click on (C) to release all the EA Form to the employees after review.
d) Click on (E) to Export the Summary Data into Excel.
e) Click on (D) to Release the EA Form only to certain employee(s).
Eg: -



TO SETUP OFFICER INFORMATION

1. Click on "EA Form Setup" tab



a) Fill in the Officer details under (**A**).
b) Click on (**B**) to Save the details.
c) The saved Officer details will display under (**C**).
d) Click on (**D**) to Edit the details from section (**A**).
e) Click on (**E**) to Delete the details.