## Finding and Adding Payees in Payment Entry - Best Practices

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<tr>
<td>1.</td>
<td>Begin at the <strong>Test Date Payment Details</strong> page for the test event you are working on.</td>
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<td>2.</td>
<td>When adding individual payees for a test date, the best practice is to search for your test center workers using the contact email address they provided to you. This is the email address they should have used to create their account and register.</td>
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<tr>
<td>3.</td>
<td>Click the <strong>Search</strong> button to open the search page.</td>
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Step | Action
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4. | The system opens the **Search for an Individual** page.

   Click in the **Email** field.

5. | Searching by the email address that the Test Center Worker used to register as a supplier is the best method to find the single, correct supplier record.

   We recommend that you maintain a list of your team member's email addresses to aid payment entry.

6. | Enter the contact email address of the first party you wish to pay into the **Email** field.

7. | Click the **Search** button.
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<td>8.</td>
<td>Because Test Center workers are asked to register using a unique (non-shared), personal email address, the system should find a single record for your test center worker.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Select</strong> option next to the supplier's name.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Select</strong> button.</td>
</tr>
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Step | Action
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11. | The system inserts the selected party as an individual to be paid.
12. | Click the **Expense Type** list box to view the list of work types.
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| 13.  | Click to select the appropriate **Work Type** list item.  
**Test Supervisor with Plus Writing** |
| 14.  | Click the **Save** button.  
**Save** |
| 15.  | Pay another supplier.  
Click the **Add a Row** button.  
**Add a Row** |
| 16.  | Click the **Search** button. |

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### Step 17

Click in the **Email** field.

### Step 18

Enter the contact email address for your next payee into the **Email** field.

### Step 19

Click the **Search** button.
20. The system did not find your test center worker.  
   Because you searched by email address, it is very likely that this person has not created an account or registered.

21. You may also query by user name.

22. Click in the **Name** field.

23. Enter the person’s name into the **Name** field.

24. Note: Although you may query using just a last name, for common names you should enter at least the first two letters of the first name with the last name, to avoid getting a very long list of possible matches.

   For very common names, add city and/or state to further reduce the possible matches.
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| 25.  | Querying by the known email address and the person's name did not locate a supplier record.  
If you believe they have not registered, and you need to complete payment entry for the entire work group, you may add them.  
**Important:** Do not add an individual when you know they have already registered.  
Click the **Create a new individual** button. |

![Add New Individual Page](image)

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| 26.  | The system opens the **Add New Individual** page.  
Complete all the required fields, marked with an asterisk *.  
Be sure to enter the email address without errors. The system will use it to contact your test center worker, requesting them to register as a supplier.  
Workers must have a registered account to receive payment. |
Step | Action
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27. | Click the **Add** button.

The system will add the new individual to be paid.

**Add**
### Step | Action
--- | ---
28. | Click the **Expense Type** list box.  
![Expense Type list box]
29. | Click to select the appropriate **Work Type** list item.  
Room Supervisor in Plus Writing Room
30. | Click the **Save** button.  
![Save button]
31. | You have searched and found a test center worker using the contact email address they provided to you.  
You have searched and failed to find a test center worker using their contact email address and name.  
You have used the **Create a New Individual** function to add them to the payment details for this test date.
32. | **Note the following special case:**  
If a test center worker reports that they did create an account and have registered, but you cannot find their record searching by their email address or name, there may be a problem with their supplier type.  
Please contact your ACT Test Administration representative and request assistance to rectify the problem account.
33. | You may also search to add the Institution to be paid.
Step | Action
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34. | Click the **Search** button.

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**Search for an Institution** works very much like the search for a person page. You may search on one or more fields.

36. | Click in the **Name** field.
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<td>37.</td>
<td>Note: If you use a % wildcard to search on partial names, you must enter at least 2 characters before the first space or % sign.</td>
</tr>
<tr>
<td>38.</td>
<td>Enter the institution name or keywords into the Name field.</td>
</tr>
<tr>
<td>39.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
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### Step | Action
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40. | The system will return a list of values that meet the search criteria.
41. | Select the institution you wish to pay.
42. | Click the **Select** button.
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| 43.  | The system inserts the institution name into the payment details form.  
      | Click the **Expense Type** list button. |
| 44.  | Click to select the **Rental (Institutions Only)** list item. |
| 45.  | Click in the **Amount** field. |
| 46.  | Enter the contracted amount to be paid into the **Amount** field. |
Step | Action
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47. | Click the **Save** button.
48. | This topic showed you how to search and find individuals during payment entry. **End of Procedure.**