Welcome to IBEW 9 MSECA's EmployerXG reporting portal.

About This Slideshow...

► This slideshow is your instructional reference guide to the EmployerXG reporting system

► It provides a comprehensive, step-by-step guide to using the app, including how to sign up, add members, frequently asked questions, user solutions, how to manage payments, and much more

► Please refer to the "notes section" at the bottom of each slide by using the PowerPoint menu items, File>View>Notes

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Access Home Page. First time users will begin by clicking the "Sign Up" hyperlink located on the bottom right of the screen. From here, you will create a user name and profile for future use. After you create your user name and password you will access the Sign In feature going forward.

Begin by entering your company's Federal ID number and your first and last name (exactly as it appeared on your Portal Authorization sheet). We suggest copying and pasting the invitation code, which will be emailed to you. Move to the next step with the "continue" button.

Here you will create a username, password, and security questions. To view the requirements for your username and password, hover your mouse over the blue icon to the right of to the entry fields. After selecting a username, password, and two security questions, view the Terms of Use, and check the "Yes, I agree to the Terms of Use" box. Then you may continue.

Note: You will receive notifications when your password expires periodically and must be changed.

In the event that you need assistance retrieving your username and/or password, use the above tools for retrieval.

After logging in, the Home Page will appear with displays of the reports that are currently due. If there are delinquent reports, they will be marked with red exclamation points. If you are reporting late, you will be given the option to pay the delinquency charges along with the benefits.

Access Customer Service by locating the "Frequently Asked Questions" tab and selecting a topic that matches your inquiry. From the drop down menu, search question topics.

Phone numbers and contacts for further assistance are located at the bottom of the "Customer Service Information" pages.

Here you will access your Employer Profile by clicking on the "Employer Profile" tab at the top of the page. Listed here are people who have been invited as EmployerXG users, along with their status.

To edit/manage an individual contact, click Edit underneath the "Employer Contacts" heading. Notice that First/Last Name and E-mail address are required fields. The option to send an EmployerXG invite is located here as well. The PA will manage the account and add users and send them an invitation code so they may begin the sign-up process here.

Set Employer Preferences by clicking "Your Preferences" tab on the upper right side of the screen.

You can select which option you would like copied if you were to use that function.
Default group will be Construction Contractors if you are under the construction agreement.
Notifications for scheduled payment confirmations will be emailed to the contact highlighted.
Notifications for remittance processed notifications will be emailed to the group highlighted.
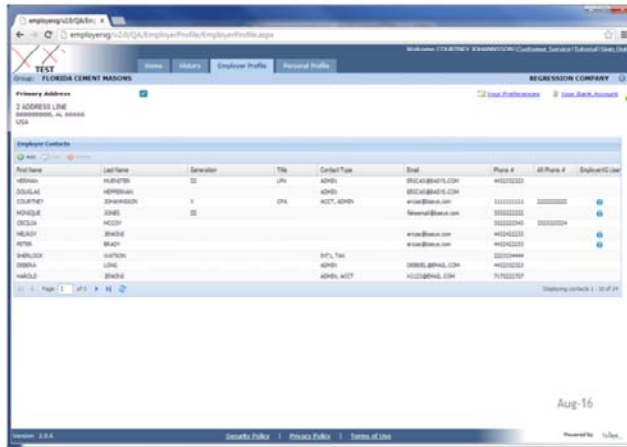
The last link on the right side is "Your Bank Account." Click and you will be able to add/edit your banking information.

Adding and Editing Employer Contacts

- Add A Contact
  - First Name, Last Name, and E-Mail Address are required fields
  - Only registered users can access Employer XG, and are noted with blue checkboxes
- Editing A Contact
  - Contact must be selected (or icon disabled)
  - First Name, Last Name, and E-mail still required fields
- Deleting A Contact
  - Removes User
  - Confirmation pop-up will occur
  - User must be selected (or icon disabled)

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Portal Administrators (PA's) are allowed to add and edit contacts

PA's are allowed to add roles to the users they have added. This is where the PA generates the email to invite the new users to sign up for EmployerXG.
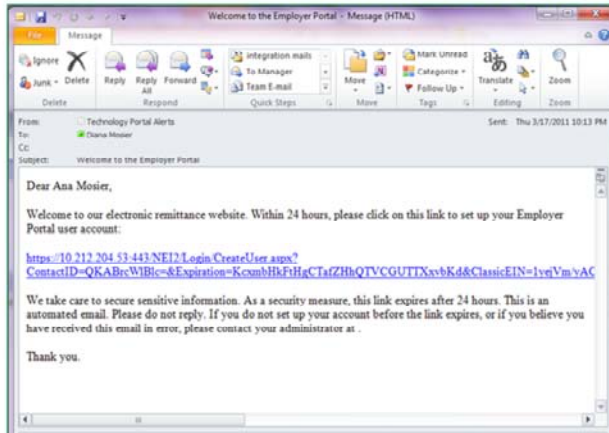
This is a sample of the generated email that will be sent to the user once the PA generates the email. They will follow the instructions on the email to begin the sign-up process.

Employer Profile – Account Status

Account status is automatically set to 'Enabled'

The PA is responsible for changing the account status.

PAs are responsible for keeping the users up-to-date.

Information about passwords, usernames, and security questions are housed under the "Personal Profile" tab.

Timing Out Vs. Signing Out

▶ Timing Out
  ▶ After 10 minutes of inactivity, you are timed out by the system
  ▶ A 1-minute warning will pop-up before you are timed out and required to log in again
▶ Signing Out
  ▶ To sign out, click "sign out" in upper left

Logged Out ☒
ⓘ You have been successfully logged out
OK

Your current session will expire in: 13 seconds. Do you want to keep the session alive?
Yes   No

Your session has timed out. Clicking on OK will log you out.
OK
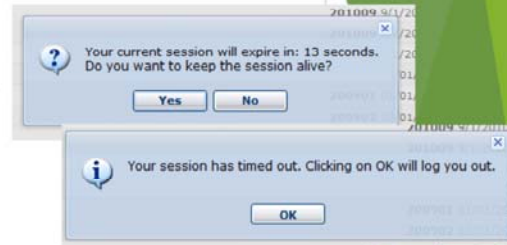
Either event closes the session and returns the user to the Landing Page.

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Information about timing out of the session. These settings cannot be changed.

Home Page for users.

Notice differences under "EMPLOYER NUMBER" heading. If you are an employer who reports under both the Construction Agreement and the Cable/TV Agreement, be sure you are selecting the correct agreement for the particular employees you are reporting.

This page shows the remittances that are due. Remember those with the red exclamation mark are delinquent. Track progress on the right side of the screen under "Upload Progress"

Selecting A Remittance

- ▶ Remittances can be opened two ways:
  - ▶ Icon (shown here)
  - ▶ Double-clicking on the Remittance
- ▶ If the Remittance is In-Progress, the user is returned to the last screen the user was on
- ▶ If the Remittance is Due, the user is taken to the Employee Details screen
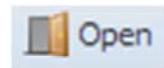
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How to open a remittance

This screen is displaying employees that are entered manually or hand-keyed.

To remove members, select members by checking box next to Employee ID and click the Remove button above Employer ID.

Employee Details Screen – Adding A New Member

If you are hand-keying the report and a member is a new employee, you will be required to add the address, date of birth and telephone number as well as gender.

Keep in mind that whenever you add a new employee, you will be required to key in the required demographic information.

If you are not entering a new employee and you are directed to this screen, there is a possibility that the Employee ID is incorrect. Please double-check for errors.

You can view a summary by employee

Summary screen - notice the amount due is calculated in the far right column.

EFT is the only option. If you haven't added your bank information yet, you will be prompted to add it here.

When reviewing amounts, please confirm that the onscreen amount matches your records.

Hitting the reset button will delete the remittance information previously entered and place the remittance in due status once again.

The confirmation will be a PDF document. Print or save for your records.

After you have selected the remittance for payment and confirmed amounts, this screen will show you that your remittance is in progress.

Your Due Remittances – Copy

A pop-up window will provide a list of remittances to copy:

▶ Matching contracts will populate Member Number, Name, and Quantities

▶ Non-matching contracts will populate Member Number and Name only

▶ After selecting a remittance to copy and clicking 'Continue,' user is taken to the employee detail screen

▶ Due Remittances Only

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This option allows you to copy remittances from a previous work period to edit and resubmit for another work period.

Your Due Remittance - Copy

Your Due Remittance – No Work to Report

▶ After "No Work" icon has been selected: [No Work]

  ▶ Popup screen provides Reference Number, Relevant Dates and Status (Review)

    ▶ OK – proceed to next screen

    ▶ Cancel – returns user to dashboard

  ▶ Confirmation Popup screen provides the same information, but Status has been updated to completed

    ▶ Download Receipt – initiates PDF receipt download

    ▶ Close – returns user to dashboard

▶ Due Remittances Only

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If there is no work to report, this step is required.

Reporting a No Work report is simple.

Your Due Remittance – Create Remittance

- ▶ Create New Remittance window opens
- ▶ At a minimum the Employer, Payroll From Date, and Payroll through date much be completed (additional fields available)
- ▶ Select 'Get Agreements' to return a list of available agreements
- ▶ Select an agreement from the list and click 'Continue'
- ▶ User receives confirmation and is returned to the dashboard
  - ▶ New remittance should already be highlighted

Create Remittance

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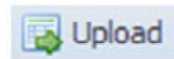*Partners for Progress*

This option is available if a report for a work period does not show up in the remittances due. However, prior to creating a new remittance, please contact the Fund Office if your monthly report is not available. Remember that only hours worked during that work period should be reported. If there is another work period you need to report for, please contact the Fund Office.

The upload function will allow you to upload your .csv or .xls file (you must have the Fund Office match your fields for uploading). File mapping will be performed prior to your first remittance upload and will not change unless we receive notification from the PA via email to teresa@ibew9mseca.org - otherwise the file will not upload. A screen will pop-up with an error message along with the SSN of the employee who is missing information. If the message indicates that a telephone number, or some other specific field, is missing, chances are it is missing all the demographic information and the message wil keep popping-up until all required information is entered.

To upload, click Upload

This is the screen where you will browse your computer for your .csv or .xls file and upload the file.

Required Fields When Uploading a File

- Last Name
- First Name
- ID (employee's SSN)
- Address 1
- Address 2
- City
- State
- Zip
- Country
- Birth Date
- Gender
- Phone
- Rate
- Hours
- Gross Wages

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These fields are required when uploading the file in EmployerXG; however, if the employee is new to the contractor all required demographic fields will need to be filled in our the file will not upload.

You will receive an error message with the member's ssn indicating that there is missing information. That message indication will mean that all or part of the required information is missing.

You will have to edit the file to enter the missing information and upload again.

See next slide

This process confirms that the information uploading matches the mapping previously matched.
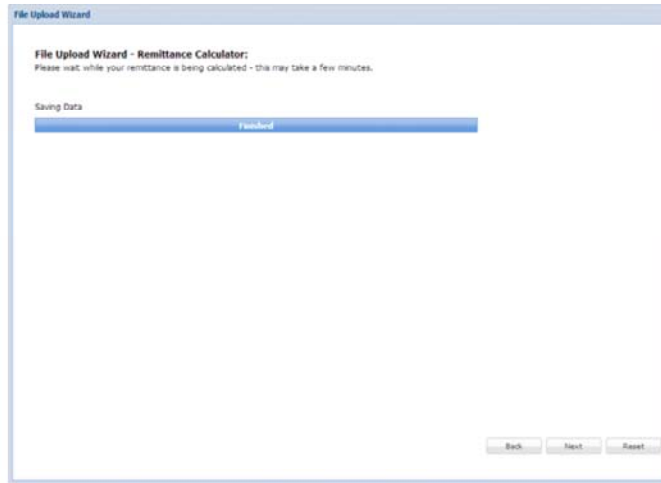
Saving file

Summary of the remittance uploaded. Please confirm for accuracy.

Upload Progress

- Provides the user the ability to view the status of remittances that are in-progress
- Once the payment has been made (and processed), item will disappear from the list
- Statuses
  - Uploading
  - Uploaded
  - Error

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Upload progress…

Once upload is complete, the remittance moves from Remittance Due to Upload Progress. Once your remittance is Uploaded, it is placed into the queue and will remain there until the selected payment date. **If you access an "In Progress" remittance it will remove it from the payment queue and you will have to resubmit for payment.**

If the systems finds a partial match with a Social Security Number, you will be prompted to enter the last name of the employee and his/her date of birth to confirm the SSN.

Remittance Transfer

▶ Happy Path

   ▶ The Fund Office system processes the remittance data immediately, or if you scheduled it for a future date, at the daily scheduled time on that specified day

   ▶ The system then sends acknowledgement messages to

      ▶ the Fund Office team *and*

      ▶ the users configured by the PA in EmployerXG's Employer Profile

   in the Portal Administration Tool

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If no errors are reported ….

History …

History of remittances

History – Receipts and Exports

▶ Receipt
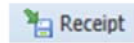
▶ Receipt

  ▶ PDF (cannot be edited)
  ▶ Can be saved and/or printed
  ▶ Limited version (header only) for No Work to Report Remittances
  ▶ Can produce receipt for any remittance in the past, not just ones posted using EmployerXG
  ▶ Receipt has employee details, unlike Confirmation

▶ Employee Export

  ▶ CSV (can be edited)
  ▶ Employees
  ▶ Can be saved and/or printed
  ▶ Not generated for No Work to Report remittances

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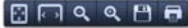Partners for Progress

Receipts and employee.csv can be printed.

Print for your records.