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EmployerXG V2

Getting Started

April 2015

Portal Authorization Sheet

When signing up for EmployerXG, you will need the following information to log in for the first time.
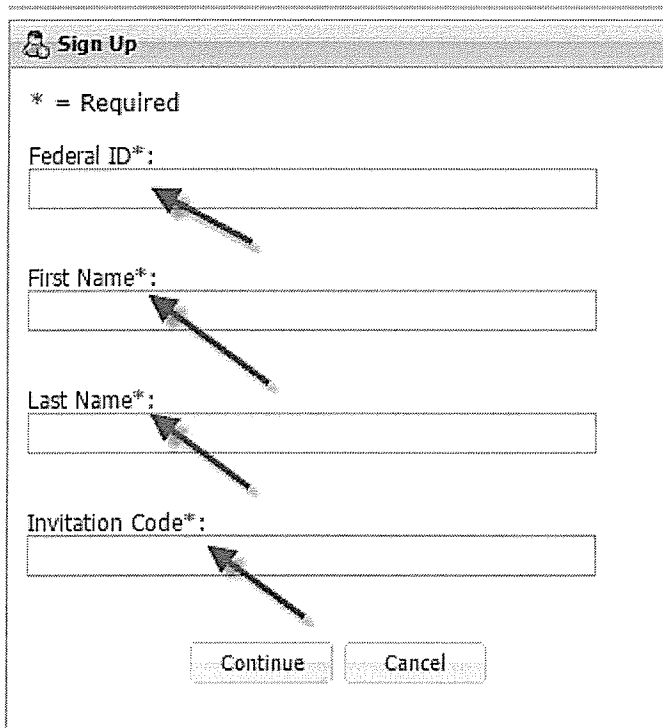
Federal ID:

First Name:

Last Name:

Invitation Code:

After you complete the sign-up process, you will be able to log in with your Username and Password.

Signing Up

1. Access the EmployerXG website.

2. Before you can sign in for the first time, you need to create an account. To begin this process, click the **Sign Up** link located at the bottom right of the screen.

   The **Sign Up** screen displays, from which you create a user name and profile.

3. Enter your **Federal ID** number (with no dash) exactly as it appears on the Portal Authorization sheet.

4. Enter your **First Name** and **Last Name** exactly as it appears on the Portal Authorization sheet.

5. Enter the **Invitation Code** exactly as it appears on the Portal Authorization sheet.

6. Click the **Continue** button and the screen changes to display user credential fields (see following screen).

7. Enter a **Username** and **Password**. *Note*: To view the requirements for your username and password, hover your mouse over the blue icon next to the fields.

8. Confirm your Password.

9. Select your **Challenge Questions** and **Answers**.

10. View the **Terms of Use** and select the **"Yes, I agree to the Terms of Use"** checkbox.

11. Click **Continue**.

Your account is created and you may sign in with your username and password (see following screen example).
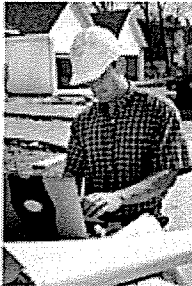
Open a remittance

1. On the **Home** tab, click the arrow to the right of the **Group** field and select a Group from the dropdown menu if the default Group is not the one you want.

2. From the **Your Remittances Due** table, click on the remittance that you want to open and to which you want to add information.

   The selected remittance displays (see following example).

3. Enter the **ID** number of the employee that you want to add to the remittance and press **Enter** or the Tab key (see following screen example).

4. At a minimum, for each employee that you add, complete the required fields which are indicated by an asterisk.

5. Click **Save**.

6. Click the **Pay** button, if desired.

Copy a remittance

1. From the **Your Remittances Due** table, select a remittance to copy to.

2. From the **Copy Remittance** box, select the remittance to copy from.

3. Click **Continue**.

4. Complete the remittance information and select **Pay** to submit your remittance.

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EmployerXG V2

QuickGuide

April 2015

Introduction

The **EmployerXG v2** portal offers you

- Remittance data entry and payment using the Internet
- Self-service access to remittance history
- Self-service address and contact maintenance

The **EmployerXG v2** portal consists of a tool bar, screens, a Group field, and additional information depending upon the screen selected. *Note*: If you are an administrator, you will have access to all screens.

Toolbar

The Tool Bar contains the following options (see screen example).

- **Customer Service**—access Frequently Asked Questions (FAQs)
- **Sign Out**—exit EmployerXG

Welcome ANNE SMITH | Customer Service | Tutorial | Sign Out

Screens

EmployerXG contains the following screens.

Home History Employer Profile Personal Profile
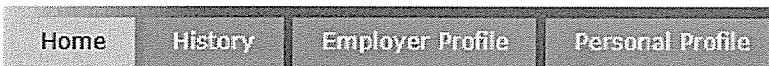
- **Home**—process remittances
- **History**—review past remittances
- **Employer Profile**—manage user access
- **Personal Profile**—update user personal details

Home

When you select **Home**, the **Your Remittances Due** screen displays (see following example).

The list of remittances due is displayed in descending order by Due Date. Years without remittances do not display in the listing.

From the **Home** screen, you can

- Open a remittance
- Copy an existing remittance
- Upload a remittance file and receive progress information on the upload
- Create a No Work remittance
- Create a new remittance
- Access valuable News and Information

Open a remittance

1. From the **Your Remittances Due** table, select the remittance that you want to view

2. Click **Open**.

Remove employee from remittance

1. Select the remittance from which you want to delete the employee and then click **Open**.

2. Select the employee that you want to delete and click **Remove**.

⊖ Remove
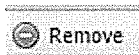
Edit employee information on a remittance

1. Select the remittance in which you want to edit new employee information and then click **Open**.

2. Select the employee whose information you want to edit and click **Edit**.

✎ Edit

3. Update the desired information and click **Save**.

4. Click the **Pay** button, if desired.

Add a new employee to an existing remittance

1. Select the remittance to which you want to add a new employee and then click **Open** (see following screen example).

Employee Details

✎ Edit ⊖ Remove 📋 Details 👥 Employees | Comment: [   ]

	Employee ID	Name	HW	G.WAGE	Amount Due
☐	333000322	MARCUS JENKINS	150.5	200	$3,757.68
☐					$0.00

2. Enter the **ID** number of the employee that you want to add to the remittance and press **Enter** or the Tab key.

3. At a minimum, complete the required fields which are indicated by an asterisk.

4. Click **Save**.

5. Enter the necessary information, for example, **HW** and the **PHW**.

6. Click the **Pay** button, if desired.

View calculation details for an employee

1. Select the remittance for which you want to display employee calculation information and then click **Open**

2. Select the employee whose calculation information you want to view and click **Details**.

Details

Copy an existing remittance

1. From the **Your Remittances Due** table, select the remittance that you want to copy to and then click **Copy**.

Copy

2. From the **Copy Remittance** window, select the remittance that you want to copy (see following screen example) and press **Continue**.

If the contracts associated with the remittances match, the ID, Name, and Quantities, or just the ID and Name will be copied, depending on your setup.

If the contracts associated with the remittance do not match, regardless of your configuration, only the ID and Name are copied.

3. From the **Employee Details** table, delete or add employees, and quantities, as necessary.
4. Select the **Pay** button, if desired.

Upload and pay a remittance

Note: You can only upload "Due" remittances if your setup permits.

1. From the **Your Remittances Due** table, select the remittance that you want to upload and then click **Upload**.
2. Browse to the file that you want to upload, select the file, and click **Upload File** .

Upload
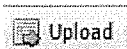
3. Click the **Next** button in the Wizard.

4. Enter a comment in the **Comment** field. This is a required field.

5. Click the **Pay** button at the bottom of the **Employee Details** screen.

6. Choose the **Payment Method** by using the dropdown menu to the right of the Payment Method field. Choose Payment Method as **"Check"** if you plan to mail a check or **"EFT"** if you wish to pay online via EFT. *Note*: These choices are setup so you may only be able to select one option.

7. At the "Accept my remittance and process my payment(s) on:" prompt, enter the date.

8. Select the Fund to pay.

9. Select the **Due**, **Due + Damages**, or **Other** radio button. *Note*: These choices are configured so all options may not be available.

   The screen looks like this (example).

Payment Method*:

BANK OF BASYS: *6637   ☑   Bank Account Maintenance

Accept my remittance and process my payment(s) on*:   10/28/2014 ☐

You are making a payment for Group 0001.

Select a Remittance to pay

Remittance ID	Employer Number	Due Date	Description	Work Period	Amount Due
☑ F32419	ANNESEMP	01/15/2015	0001 - REGRESS...	201412 12/01/2...	$28,868.97

‹

○ Due
○ Due + Damages
◉ Other

10. Click **Apply**.

11. Click **Confirm**.

12. Click **OK** to confirm the payment.

13. Click **Print Confirmation**. How the pdf displays depends on the internet browser you are using.

    You will also receive an email confirming payment.
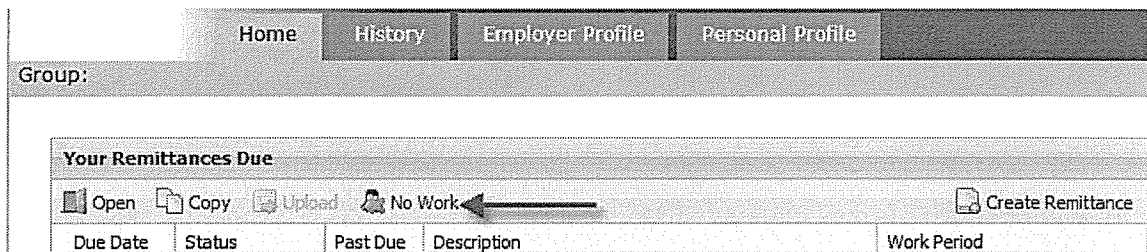
    You can view the progress of the upload from the **Home** screen in the **Upload Progress** table (see following example).

Upload Progress			
Remittance	Group Code	Work Period	Status
F32398	0001	201303	Uploaded
F32402	0001	201307	Uploaded

    The status can be "Uploading," "Uploaded," or "Error." After payment has been made, the uploaded information no longer displays in the table.
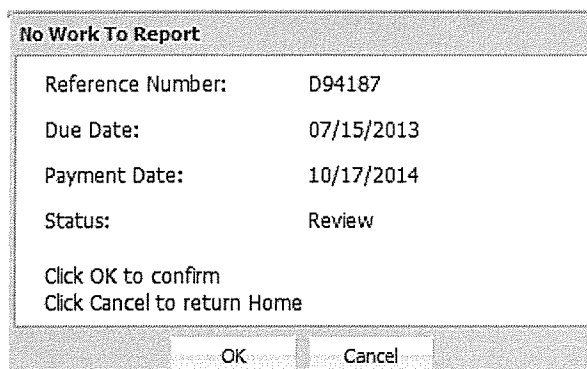
Create a No Work remittance

1. Select the remittance to which you want to apply No Work.

2. Click **No Work.**

    If you click on a remittance that is "*Due,*" the **No Work To Report** popup box displays (see following screen).The No Work option is disabled for remittances that are In Progress.

No Work To Report	
Reference Number:	D94187
Due Date:	07/15/2013
Payment Date:	10/17/2014
Status:	Review

Click OK to confirm
Click Cancel to return Home

OK   Cancel

3. Click **OK** to confirm.

4. Click **Download Confirmation** to initiate a PDF receipt download.

5. Open the PDF to view the **Remittance Confirmation** (see following screen example).

FLORIDA CEMENT MASONS
Remittance Confirmation

Employer Code:	128600000	*Agreement:*	REGRESSION 3
Employer Name:	REGRESSION COMPANY	*Contract:*	REGRESSION 3
Reference Number:	F07858	*Payroll Dates:*	6/1/2014 - 6/30/2014
Due Date:	7/15/2014	*Report Period:*	201406
Payment Date:	10/21/2014	*User Name:*	COURTNEY JOHANNSSON
Scheduled Date:	N/A	*Grand Total:*	No work to report
Payment Method:	N/A	*Check #:*	N/A

Generated on: 10/21/2014

Create a new remittance

1. From the **Your Remittances Due** table, click **Create Remittance**.
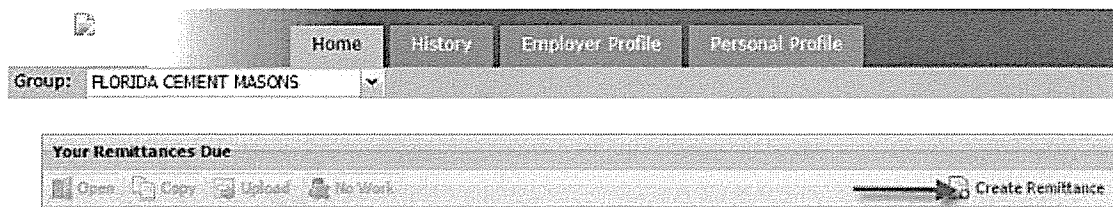
The **Create New Remittance** screen displays.

2. At a minimum, enter information into the **Payroll From Date** and **Payroll Thru Date** fields in MM/DD/YYYY format or use the calendar icon to the right of each Payroll field to select the dates.

3. Click **Get Agreements**.
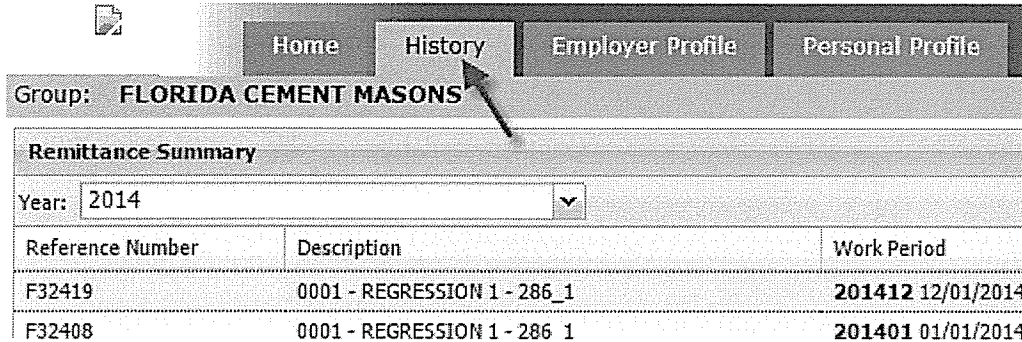
4. Select the appropriate agreement from the **List of Agreements** screen.

5. Click **Continue**.

   You will receive a confirmation and are returned to the **Your Remittances Due** table with the newly-created remittance highlighted. You may then choose to upload the remittance.

History

When you select **History**, the following screen displays (example).

From the **History** tab screen, you can

- View and print a receipt of a selected historical remittance
- Access an Excel listing of employees associated with a selected remittance

View and print a receipt of a selected history remittance

1. From the **History** tab, use the **Year** dropdown menu to select the year associated with the remittance that you want to view.

2. Select the desired remittance from the **Remittance Summary** table. *Note:* After you select a remittance, the **Remittance Details** table at the bottom of the screen is populated with information pertaining to that remittance.

3. Click **Receipt**.

4. Open the PDF receipt file and the following screen displays (example).

FLORIDA CEMENT MASONS
Remittance Receipt

Employer Code:	ANNESEMP	Agreement:	REGRESSION 1
Employer Name:	ANNES TEST EMPLOYER	Contract:	REGRESSION 1
Reference Number:	F32419	Payroll Dates:	12/1/2014 - 12/31/2014
Due Date:	1/15/2015	Report Period:	201412
Payment Date:	11/5/2014	User Name:	ANNE SMITH
Scheduled Date:	N/A	Grand Total:	$28,868.97
Payment Method:	EFT-****6637	Check #:	N/A

Fund	Amount Due	Damage Due	Total Due	Amount Paid
ANN-FND	9263.76	0.00	9263.76	9263.76
PENSION FUND	19605.21	0.00	19605.21	19605.21
Total:	**$28,868.97**	**$0.00**	**$28,868.97**	**$28,868.97**
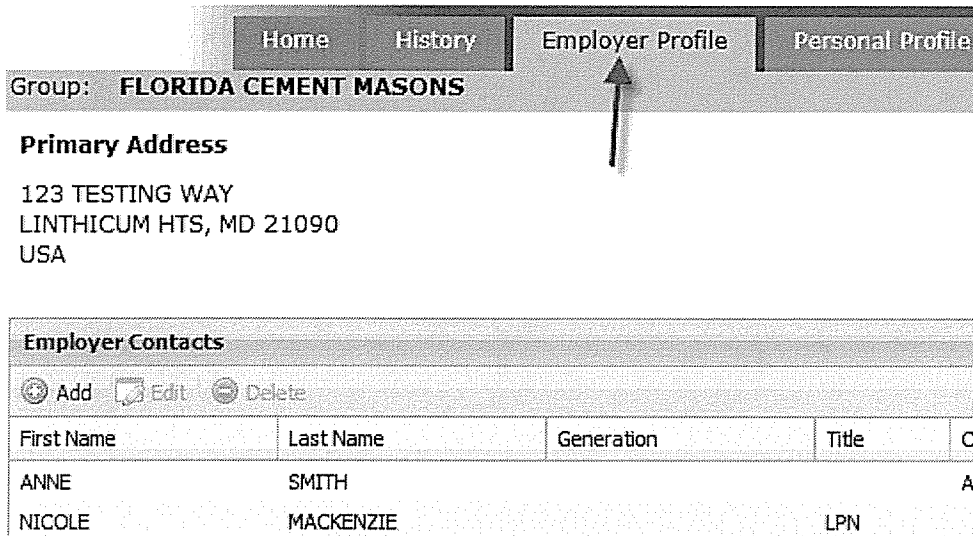
Access an Excel listing of employees associated with a selected remittance

1. Select the **History** tab.

2. Select the desired remittance from the **Remittance Summary** table.

3. Click **Employee.**

4. Click **Open.**

    The excel spreadsheet displays for you to view, save, or print. *Note*: You must have Excel installed on your machine to access the spreadsheet.

Employer Profile

When you select **Employer Profile**, the **Employer Contacts** screen displays (example). *Note*: You must be an administrator for this tab to display.

	Home	History	Employer Profile	Personal Profile

Group: **FLORIDA CEMENT MASONS**

Primary Address

123 TESTING WAY
LINTHICUM HTS, MD 21090
USA

Employer Contacts

⊕ Add   ☑ Edit   ⊖ Delete

First Name	Last Name	Generation	Title	C
ANNE	SMITH			A
NICOLE	MACKENZIE		LPN	

From the **Employer Profile** tab screen, you can

- Add, update, and delete employer contact information
- Set your preferences
- Add, update, and delete employer bank account information

Add employer contact information

Note: You must have an administrator role to view the **Employer Profile** tab, add contacts and assign a specific user role to the contacts, and to change the account status.

1. Select the **Employer Profile** tab.
2. Click **Add** and the **Manage Contact** popup displays.

```
Manage Contact
* = Required

First Name*:                      E-mail*:
[                    ]             [                         ]

Last Name*:                       Phone Number:
[                    ]             [                         ]

Generation:                       Phone Number (Alt):
[Select a Generation...      v]   [                         ]

Title:
[Select a Title...          v]

  Employer XG User                  Send EmployerXG invitation email

Account Status*:                  User Role*:
[                      v]          [                      v]

            [ Save ]   [ Cancel ]
```

3. At a minimum, enter information into the required fields: **First Name**, **Last Name**, and **E-mail**. *Important*: If you select the **Send EmployerXG invitation email** checkbox, when you save the contact information, the contact is sent an email containing the instructions to begin the sign-up process. Notify the contact to watch for this email since the link it includes expires after 24 hours. If they do not use the link before it expires, you will have to send another Invitation email.

   Also, after selecting the **Send EmployerXG invitation email** checkbox, the **User Role** field will become enabled. Use the User Role dropdown menu to select the appropriate role for the contact.

4. Click **Save**.

Edit employer contact information

Note: You must have an administrator role to view the Employer Profile screen, add contacts and assign a specific user role to the contacts, and to change the account status.

1. Select the **Employer Profile** tab and the **Employer Contacts** screen displays (example).

Group: **FLORIDA CEMENT MASONS**

Primary Address

123 TESTING WAY
LINTHICUM HTS, MD 21090
USA

Employer Contacts

⊕ Add   ☐ Edit   ⊖ Delete

First Name	Last Name	Generation	Title	Contact Type	Email
ANNE	SMITH			ADMIN	anne@basys.com
NICOLE	MACKENZIE		LPN		nikki@gmail.com
ALLISON	RANDALL		PhD		alli@hotmail.com
BRENT	MILLER	II	MD		bml@gmail.com

2. Select the contact whose information you want to edit.

3. Click **Edit** and the Manage Contact screen displays (example).

Manage Contact

* = Required

First Name*:

| ANNE |

E-mail*:

| anne@anywhere.com |

Last Name*:

| SMITH |

Phone Number:

| |

Generation:

| Select a Generation... ▾ |

Phone Number (Alt):

| |

Title:

| Select a Title... ▾ |

Contact Type:

| ADMIN |

☑ EmployerXG User   ☐ Send EmployerXG invitation email

Account Status*:

| Enabled ✕ ▾ |

User Role*:

| Administrator ✕ ▾ |
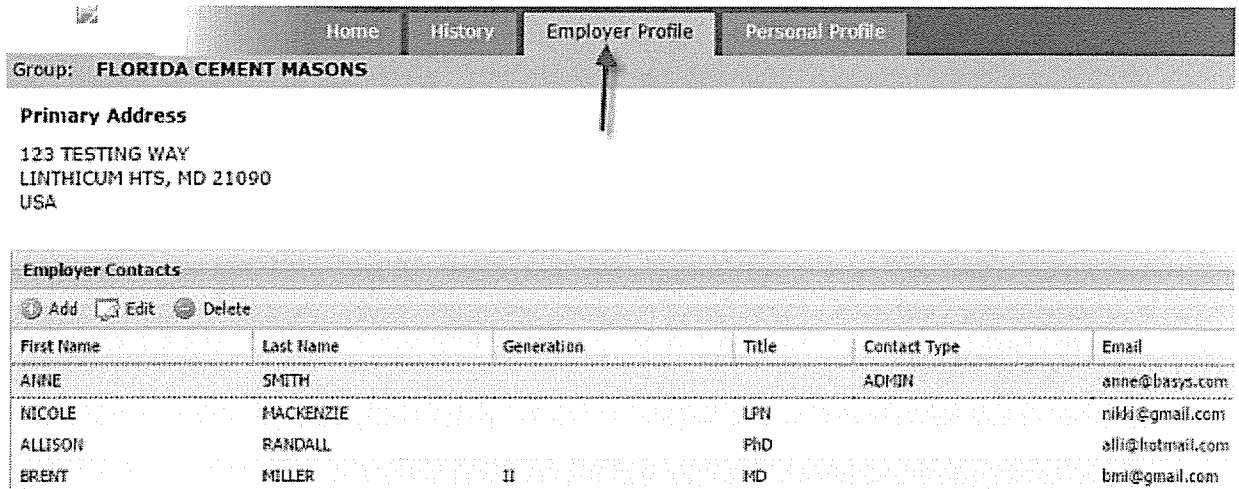
Save   Cancel

4. On the **Manage Contact** screen, update contact information as necessary and click **Save**.

5. Click **OK**.

Delete employer contact information

Note: You must have an administrator role to view the Employer Profile tab, add contacts and assign a specific user role to the contacts, and to change the account status.

1. Select the **Employer Profile** tab and the **Employer Contacts** screen displays (example).

First Name	Last Name	Generation	Title	Contact Type	Email
ANNE	SMITH			ADMIN	anne@basys.com
NICOLE	MACKENZIE		LPN		nikki@gmail.com
ALLISON	RANDALL		PhD		alli@hotmail.com
BRENT	MILLER	II	MD		bmi@gmail.com

2. Select the contact whose information you want to delete.
3. Click **Delete**.

4. Answer **"Yes"** to the deletion message.
5. Click **OK** in the deletion confirmation message popup.

Set your preferences

1. Select the **Employer Profile** tab.
2. Click the **Your Preferences** link and the **Your Preferences** popup displays.

Your Preferences

* = Required

Copy Remittance Options*:

| Employee ID, Name, and Quantities | ✕ | ▼ |

Default Group*:

| FLORIDA CEMENT MASONS | ✕ | ▼ |

Scheduled Payment Confirmation*:

| Primary Contact | ✕ | ▼ |

Remittance Processed Alert*:

| Primary Contact | ✕ | ▼ |

3. Use the **Copy Remittance Options** field's dropdown menu to choose what displays when you copy a remittance.

Add, update, and delete bank information

Note: You must have bank permissions to add, update, and delete bank information. Also, if only a check payment if configured for your company, you may not be able to perform these actions.

1. Select the **Employer Profile** tab.

2. Click the **Your Bank Account** link at the top right of the screen.

$ Your Bank Account

3. All fields except **Disable Account** are required. Add, update, or delete the appropriate information and click **Save**.

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Personal Profile

When you select **Personal Profile** , the **Contact Information** screen displays (see following example).

From the **Personal Profile** tab, you can

- Add or update your personal contact information
- Change your password and security questions/answers

About EmployerXG Portal

EmployerXG Portal is a secure, online, real-time application that lets employers submit remittance information and payments easily and securely over the Internet. The simple layout and flow lets employers easily enter employee data and quantities, while the system accurately calculates remittance amounts due including damages and interest for delinquent and discrepant remittances. The application also comes with Frequently Asked Questions (FAQs) and video tutorials that users can access from any page in EmployerXG Portal via the Customer Service link.

There are two levels of EmployerXG Portal administration:

1. The basys customer assumes the Portal Administrator role and uses the Portal Administrator software to configure EmployerXG Portal system-wide and group settings, as well as manage user accounts.

2. One or more of an employer's users may be assigned the Employer Administrator role, responsible for maintaining employer contact and address information.

EmployerXG Portal has the following main pages:

Landing Page - This is the initial page users see when they access EmployerXG Portal. This page provides information about the site and allows users to sign up for an EmployerXG Portal account. Once they have an account, they can sign into EmployerXG Portal from the Landing page.

Home Page - After users sign in, they see the Home page. This page displays all the expected remittances for the employer. The News and Information webpart displays additional content, such as announcements or links to important documents or news articles. The content that displays in this webpart is configurable via Portal Administrator. From the Home page, users can select a remittance, choose a remittance entry method, and then enter employees and quantities into the Employee Detail page.
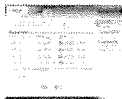
History Page - From the History page, users can search for and view details for previously submitted remittances for the employer.
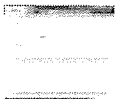
Employer Profile Page - The Employer Profile page is where users add, edit, and delete employer contacts.
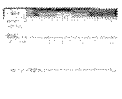
Personal Profile Page - Users can edit their name, contact information, and password information from this page.
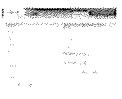
Related Topics

Welcome
Copyright
Get Started
About the Documentation
EmployerXG Portal Overview
Portal Administrator Overview
Deploying EmployerXG Portal
Setting Up and Maintaining Portal Administrator
Troubleshooting
Using Portal Administrator

Get Started

This topic outlines where to start. First you'll want to install and configure Portal Administrator. Once that is done, you can assign an invitation code to employers and invite employer contacts to sign up for EmployerXG Portal accounts.

Installation and Configuration

1. Ensure the Portal Administrator application prerequisites and employer Internet browser specifications are met:

   - See Prerequisites for the Portal Administration application.

   - See the basys browser support documents for Internet browser specifications. Contact basys if you do not already have these documents.

2. Install the software.

3. Configure the system. There are some configuration settings that you will want to review and set according to your specific business needs.

4. Set up correspondence.

5. Set up criteria to generate a report of remittances that were transferred from EmployerXG Portal and suspended in the core administration system. This can assist with troubleshooting data transfer issues.

Using the System

1. Create invitation codes.

2. Create a list of the employers you wish to invite to use EmployerXG Portal.

3. Send EmployerXG Portal invitations to selected employers.

About the Documentation

This documentation is intended for administrators that will be using Portal Administrator to configure EmployerXG Portal pages and functionality, and manage EmployerXG Portal accounts and users. If you are new to Portal Administrator, begin with the Get Started and About Portal Administrator topics.

Formatting Conventions

The documentation uses the following formatting conventions:

Convention	Description
Blue Underlined	Indicates a hyperlink. Click the text to go to another topic.
Purple Underlined	Indicates you have clicked the hyperlink before.
Green Bolded	Indicates a glossary term. Click the term to see the definition.
Note: or *Important:*	Indicates additional or important information.

Images

The documentation uses thumbnails for large images. To view a thumbnail in full size, simply click it. Click the image to return to the topic.

Toolbar Icons

Listed below are the toolbar icons for using the documentation.

Opens the topic that was viewed previously.

Opens the next topic in a previously viewed sequence.

Returns you to the documentation's home page.

Opens the table of contents in the navigation pane.

Opens the index in the navigation pane.

Opens the search in the navigation pane.

Opens the glossary in the navigation pane.

Removes the highlighting from a topic when search was used.

Date of Session: 1/13/15

Session Objective(s):	Weekly Status Meeting
Session Facilitator:	Diana Mosier

Attendees

Name	Company	Required/Optional	Attended?
Whitney Mendez	basys	Out of office	No
Diana Mosier	basys	Required	Yes
Alex Heller	INLAB	Required	Yes
Janetta England	INLAB	Optional	Yes

Preparation for Working Session

1. Agenda creation

Agenda / Working Session

Task	Responsible Resource	Duration	Status – Completed, Follow-up needed, Not Discussed	Follow-up Required by (if applicable)
1. Agenda creation				
2.				
3.				
4.				

Current Notes:

1. Onsite Schedule

Past Notes:

2. Assessment Types/Receivables
   In EBT you can pay off Interest as you get them in, typically the Members will have already got credit. If a Member hasn't got credit, leave under regular contract and the operator can turn off Interest.
   a. "INT" Interest as a "D" won't continue to accrue.
   b. "LDI" Liquidated Damages Interest as an "I" is used in a schedule and will accrue.
3. Highway/Local Tracking – The Locals have been set-up as Employers that can be entered as a "Remitter" on Receipts Entry. A Local can be specified on ANY AGREEMENT as a Remitter by the Operator, instead of having a separate Agreement Link per Employer. The Portal will be configured as a Comment and an area on processing and you can put notes to the Employer. We can put something out there such as "Put Local in Comment" and making sure they know. We should require it for everyone regardless of what type of Agreement.
4. Over/Under Review – Test scenarios to Alex.
5. EBT Navigation – Reviewed how to pay off Range Payments to an Underpayment.
6. UAT – We are planning on coming out Jan 18th and prior to that we can do ½-1 hour training prior to that. We can schedule it for the week of January 4th and their lunches start at 11:15pm so 10am would work well and cc Janetta and let her know about the days.
7. EmployerXG Configuration – Whitney will review that with INLAB next week

5. Audit and Audit Tracking
   a. 2 audit types – For Cause and Standard (at random) and the codes have been added to the system to appear under 'Current Action'.
   b. Employers won't have the ability to pay on audits thru the Portal.
6. Underpayments/Overpayments
   c. INLAB will collect on the penny for all underpayments or overpayments
   d. When entering, the quantity on the MD screen will be assigned to the Member.
7. EBT Payments, Waivers and Transfers
   e. For the Transfer, you will have the option to enter in a check# and to easily track you it you can enter in the TRAN-(REFNO).
   f. The "As of Date" you can enter in a future date to view what the Interest will be as of that date.
   g. If you need to add a Receivable or Credit to an Employer you can create an new in the EBT screen.
8. Assessments –
   Interest: Minimum threshold amount. $5.00 for HW if less than that, a window will appear in Receipts Entry asking if you want to Accept. On the Portal, if the HW is less than $5.00 you can make a way to not send statements for amounts less than that. You can create an Assessment manually, if needed, that can be linked to the schedule. INLAB will want to use this because there are some Employers that have ongoing reporting issues. You can customize the Employers that have those thresholds, some they might want to not.

Over-Shorts: Auto-Balance will allow a certain $ per fund. If keying internally you have the option to use or not to use. The system will not force it. In the Portal, the threshold will stay the same.

On the Portal, the Employers would have to call the Fund office if they enter a report under the wrong Contract. INDY will have to reverse the report, or suspend

9. Interest – Diana submitted a request for it to be customized so the funds will calculate correctly. Alex will send a few samples of 2 different reports (principle, days late and current calculation), for testing.

10. Highway/Local Update – Need to meet internally still on how to track the Locals with only 1 HWY contract. It might be difficult to keep those Highway contracts and links correct if there is the same rate but different Locals. It doesn't matter if they report Building and not Highway one month and won't cause a delinquency under Highway, only if they don't report either would it cause a delinquency (rules applies to all Agreement types). Diana will change the delinquency method of 1.

11. Remittance Forms – Whitney to follow up with Angie on the progress.

12. Data conversion review:

   A. Used employer L00006026 – Bunn Excavation, reference number A20398 / August 2015 Computed amount for welfare should be 1804.00 and is showing as 1704.00.

   B. L00000776 LEE C CONSTRUCTION SERVICES - AUGUST 2015 – WELFARE AMOUNT CORRECT (KM7254). TRAINING WAS Computed amount 205.75 SHOULD HAVE BEEN 226.32 FOR SHORTAGE OF 20.57 (A01510 refno)   computed amount = 0 and reported amount = = 205.75.

   C. Reviewed data using computed and expected amounts.

   D. Schnell – August 2015 – still need to have reported amounts in for all the negative and reposted line items.

   E. Incoming reciprocity – Issue 11 in the issue log was entered because there is no incoming reciprocity loaded. After discussion, we will need to load the incoming authorization files just for information. Diana will coordinate with basys team (Sarah/Bill) and Josh to get this data loaded. And a line item added to the data conversion tracking spreadsheets.

2. **Discrepancy Fund**
   After reviewing with Janetta and Alex, we will not be setting up discrepancy funds at this time. During later training we will review this again to see if it is worthwhile. There are only 4 funds which means only 3 would need to be setup and the operators right now have control over how they will choose to move the money around if there is a shortage.

3. **Assessments Review**

   Alex will get Diana the minimum threshold dollar amount needed for miscellaneous assessment to setup the reports (minimum for list). See screen shot of Misc Assessments report attached below.

   Once a list is created, that list can be used in the Miscellaneous Assessments Statements.

   Additional need: we will need to have the assessment 'letter' information setup as paragraph to generate the statement.

```
** MISC ASSESSMENTS RPT **  - 12:25:28 Nov 20 2015 -        pts7   PRT-CON-MISC

 1. Employer                        (S/L/A) : ▓▓▓▓▓
 2. Payroll End Date From                   :
 3. Payroll End Date Thru                   :
 4. Assess Date From                        :
 5. Assess Date Thru                        :
 6. Report Received Date From               :
 7. Report Received Date Thru               :
 8. Assessment Payment Deposit From         :
 9. Assessment Payment Deposit Thru         :
10. Open, Closed              (O,C,<cr>=All) :
11. Balance As of Date                      :
12. Report Detail Level                     :
13. Break Page by Employer          (Y/N)   :
14. Minimum Balance for Open Assessments    :
15. Create List Name                        :


W1. Group      W2. Fund      W3. *Contract      W4. Type      W5. Area
-----------    ----------    -------------      ----------    ----------
```

3A. Assessment schedule:

```
** ADD/UPD MISC ASSESS SCHED- 11:56:36 Nov 20 2015 -      pts7   UPD-CON-ASSESS

   Schedule : MASTER
1. Name     : MISC ASSESSMENT SCHEDULES

** PAGE 1 OF 1 **
Seq Dt Created Sched
--- ---------- ------
2   09/29/2005 B00001
```

<SC2>

```
** MISC ASSESS SCHEDULE **  ~ 11:57:26 Nov 20 2015 -     pts7   S.UPD.CON.ASSESS

Schedule : MASTER - MISC ASSESSMENT SCHEDULES

1. Override Due Record (Y/N) : Y
2. Custom Subroutine         :


** PAGE 1 OF 1 **   Calc Late  Asmt. Asmt.     Basis Asmt.   Asmt.    Asmt
Seq Fund   Time Qty Basis Basis Basis Rate      Max   Minimum Maximum  Type
--- -----  ---- --- ----- ----- ----- --------- ----- ------- -------- ------
3   HW     M2   1 C   R    PM    0.0000000                             LD
4   PEN    M2   1 C   R    PM    0.0000000                             LD
5   LTR    M2   1 C   R    PM    0.0000000                             LD
6   ILDCTF M2   1 C   R    PM    0.0000000                             LD




Select: ___  <F>File <#>Upd <I>Int <D>Del <A#>Add <S>Scrl <B>Bck <P#>Pge <X>eXit
```

<|>

```
** ASSESSMENT INTEREST **   - 11:57:49 Nov 20 2015 -      pts7   S.UPD.CON.INT

Schedule : MASTER - MISC ASSESSMENT SCHEDULES

    Override Due Record : Y
1. Custom Subroutine   :

** PAGE 1 OF 1 **    Grace  Int. Interest                  Asnt      Interest
Seq Fund    Time Qty Period Type Rate       Calc Compound Type      Cap
--- ------  ---- --- ------ ---- --------- ---- -------- --------  --------
2   HW      M2   1              C    0.0027397 D    N      LD
3   PEN     M2   1              C    0.0027937 D    N      LD
4   ILDCTF  M2   1              C    0.0027937 D    N      LD
5   LTR     M2   1              C    0.0027937 D    N      LD




Select: ███  <#>Upd <A#>Add <S>Scroll <B>Back <P#>Page <X>eXit
```

Reviewed the Assessment schedule and then tested using employer L00006024 Bunn
The dollar amounts looked reasonable to Alex, but he will verify that they are exact

4. Employer Balance L0000626:
    Posted report that was late and

    The Received date = 11/20/2015; the work period end date 08/31/2015 so the interest
    started 09/01/2015-11/20/2015. Each day the interest will continue to accrue at the rate of
    .0029737

    Using Employer Balance
    Filtered on just "LDI" assessment type.

```
** EMPLOYER BALANCE **        - 12:00:48 Nov 20 2015 pts7   S.UPD.CON.MISCDET.INT

    Employer : L00006026- BUNN EXCAVATING   3. Area       :
1. Group:                                   4. Location   :
2. Local:                                   5. Association :
6. Fund :              7. As Of:              8. Ref#:       9. Sts (O/C/B):
           PayrollEnd Fund             Receivable    ** Page 1 of 1 **
Seq Refno  Asnt Date  Group   Type     Payments   Total         Sts Rev#
--- ------ ---------- ------  -------  ------------ ------------ --- ------
10  C65240 08/31/2015 HW      LDI       75.50        75.50      0
           11/20/2015 L
11  C65240 08/31/2015 PEN     LDI       99.00        99.00      0
           11/20/2015 L
12  C65240 08/31/2015 ILDCTF  LDI        3.00         3.00      0
           11/20/2015 L
13  C65240 08/31/2015 LTR     LDI        7.00         7.00      0
           11/20/2015 L
```

Also - Alex has updated the CAF fund to FWCAF for local 213

5. Data Conversion
   - Over/Shorts-Alex will review the files to make sure it is all correct.
   - After they moved Reciprocity it effected the ID for the Employers and Names, they are incorrect on the Member Work History detail. Everything in the Reciprocity file was fine, but there was a date that Alex questioned the "Work From" was the same as "Action Date". Welfare/Pension can go back a year. NEED TO BE RELOADED WITH "R-LOCAL".
6. Due Records – Diana set-up the Delinquency and the Holiday schedule and demo'd it for Alex. Won't be marked Delinquent once you run the Delinquency Prep.
7. Diana and Whitney are researching how to track Locals for Highway Employers
8. May need to setup a discrepancy fund to apply any overages/unders to the HW fund, as is INDY's standard procedure.
9. Alex will fix the 213 Building contract funds.
10. Receipts Entry
    - Use short cuts like % for the Exception or %YYYYMM, "." To carry over same SSN to the next line.
    - <MD>Work Period Exceptions
    - <SM>Re-Calc
    - <SM>Fund Totals
    - <SM> Other Functions

8. Data Conversion – Reciprocity file. Sarah has corrected the file and all years are ready to test. Alex will do more Data Validation today.

9. Assessment Schedule-Need to be reviewed in the next meeting.

10. Autobalance – Diana set-up the below in Autobalance.

Seq	Fund	App	Shift	Qty/Amt	Difference	Method
1	HW		AMT		5.00	A
2	HW		AMT		99999999.T	M
3	PEN		AMT		5.00	A
4	PEN		AMT		99999999.T	M
5	LTR		AMT		1.00	A
6	LTR		AMT		99999999.T	M
7	ILDCTF			AMT	99999999.T	M
8	WDF			QTY	99999999.T	A
9	WDF			AMT	99999999.T	A

11. Receipts entry short/over and late report- Need to review in the next meeting. We received the EBT and reviewed how to apply Misc. Assessments to the Employer EBT from Remittance Entry.

12. SAC that control the different fields and get them set-up

13. Alex would like to train on how to create a new fund, in particular that related to Building 213. Need to change CAF to FWCAF for $.03.- For the penny funds, you will do the following:

    - Add a Fund and make sure that under O1 the Penny Fund is marked with a "Y".
    - Add Fund to Security under "ALLFUNDS".
    - Change the Funds under the Contract

14. Alex will be updating the Funds under the Contracts under 213.

15. Adding a Local on Remittance Entry Header Screen – If there isn't a Local set-up under the Agreement Link, Remittance Entry will give you a message of "no agreements found matching qualifiers". Diana is looking into the best way to track those Locals that are received for Highway. They may report under more than 1 local in a month, but as long as 1 is reported under Highway for that Employer they don't track delinquency.

16. Group B Data Validation (need a listing of 10/15 Member and Employers for Data Validation)

17. If there were funds that have short/overs they were not appearing in the Employer Work History.

18. Employer Work History-the payroll from/thru date looked like to be pulled from the report received date and not the work date. Ex. Report received August 15th for July, the history is showing a August report (from/thru) instead of July.

19. Sarah is already aware of this and is looking at it

20. The only remaining file to load is the Agreement Links. Alex will review Contracts/Agreements today.

21. UAT Review

22. Contributions Remittance Entry Review

23. INLAB will be using Batch Manager per Operator, as you can't use 1 total Batch because you can't have multiple Operators entering in information under 1 Batch number.

24. We'll review short/overs in their system at a future date, so they can see the data as it would be day-to-day.

25. Data Validation Questions/Concerns
    Getting some progress on the penny funds. Depending on the data load. Group B should go thru validation this next week. Contracts can still be accessed even though they are doing data loads. If it is training with no Welfare, change the penny fund.

26. UAT Review

27. Employer Information, Agreement Link, Status Dates, Member Reciprocity set-up Training
    The weekly employers (who report weekly) still have a Frequency of 'Monthly' and key in the reports when you receive them as supplemental.
    Need to figure out why they can't add Member Status Dates. Would enter in when they first receive Contributions, that would be considered the 'Hired' date.

28. LEBPCT (per Alex): 3rd party, not set-up as a Contractor. They handle all Pipeline Contractors. The LEBPCT hours go to them first, all checks come from LEBPCT to INLAB but they aren't signatory and operate off contracts the Employers or out of State locals are signatory to. The reports from LEBPCT list the rates and INLAB will have to accept them as

they are, in good faith. Some funds repeat and others are custom, some vary contractor to contractor each month.
Need a contract and an agreement for Data Conversion.
LEBPCT would not accept Contributions if they were not signatory in the area the Contractor is working in.
More than 20, but some might not be signatory.
Will find out why the Rate Determinator won't show up.

29. Contract Set-Up Progress: Alex added all the Contracts/linking to the Agreements (included the Specials), except for the LEBPCT fund. Set-up in the meeting (need to find out about Rate Determinator).

30. Delinquency Dates-still pending on basys side: Reports due the 10th, assessment wouldn't start until the beginning of the next month. Set-up Grace Days to be 20 days, so that the Deliq Date is due the 30th.

31. Remittance Form discussion outcome with Angie and Spencer: Could list the penny funds listed on the Employer-but would only be a note on the form and on the portal.
3 funds/working assessments that currently appear on INLAB's current remittance forms, can be put on basys form but it then becomes a hidden set of funds on remittance entr. On the portal, the penny funds will be hidden from the portal which could create a situation where everything works corrently if using remittance form, but the problem lies on the portal there would be no way to show the add'l funds. David said the penny funds should be on the portal. Gross wages would need to be added on the fund so it will appear on the portal. You can enter thru and skip it. From the portal, you would need to send them a flat file to show them everyone they sumitted that day.
Need a new column for gross wages. It would be 5% for working dues. Auto Balance would be set-up to accept whatever comes in. Diana will try fix EVERYcontract to include Dues. A line item will be added. CAF/CAPCI/MACIAF/NICA/IUCISAT/ICIAF/SAT/BCRC
An auxlilary rate of zero Diana will add, and Alex will fill in the actual rates.
Janetta will talk to David about the penny funds.

32. Employer Status-Active/Inactive Signatory/Non-Signatory is what is currently in INLAB's system. There is a comment field that may have notes like "use FedID…instead, etc". Comments have been converted already.

33. Data Conversion Validation (Member and Employer Contributions): Employer contributions has not been loaded. Member call record will be loaded into Correspondence. Michael will be sending a listing of data validation listing to Janetta for more information.

34. Reciprocal Locals-There is a reciprocal 41 and currently showing as 81. Need to have an 41 local.

35. Agreement progress by INLAB: Status on special Agreements (71 total) -research has been done by Alex, they just need to be set-up in the system. Alex has set-up some (set-up Commercial/Industrial 41 and 81 as a link, 22 Contracts have been set-up without linked to the Agreement).

36. Contracts – the deadline is 10/23. Review Diana's email from 10/1 to see if any questions. Agreements can be set-up first for the 71 that way Josh can use it for Data Conversion-Linking.

37. Delinquency Date proposal: basys still working on this item. Should have a solution by next week.

38. Remittance Forms- Forwarded to our CreateForm contact, Angie. : Need to have the Fed ID# and ERMA, full SSN populated. Would 6 months of reports pre-populate Members? Need to ask Angie. How would the Employer choose the type of Agreement on a blank form? Would like to have the rates pre-populated, that would save INLAB and the Employers a lot of time.

39. Agreement/Contract Training

40. Employer Status : Some are assigned to Maintenance Agreements that is 3-4 (2013-2017 was an example) years going back that they are keeping on basys because they could re-activate at any time. Signatory and non-signatory Janetta and Donny are working on. Whitney and Diana will need to talk to Sarah about the status code (Sig and Non-Sig).

41. Funds that INLAB doesn't track on the remittance forms : how will that be populated on the Portal and on the Remittance Forms?

Action Items/Deliverables from Last Session			
Task	Responsible Resource	Due Date	Actual Date
Project Management Tasks			

Next Meeting

Date:	12/22/15	Time:	10:00am	Session Type:	Working Session
Notes:	Future Topics: 1. Assessment types and receivables 2. Over / Unders 3. EmpXG Portal BPR/UAT and Configeration				

Outstanding Issues Log – *These items should eventually be a specific meeting agenda item*
- Placeholder list of:
  - Issues that are not on the current agenda that come up during a meeting
  - Items to be covered in the future
  - Items that need a decision made later/based on something else occurring

#	Description	Date Added
1.	Need to discuss over/unders and where they will be applied. Janetta said it wasn't only to HW.	
2.		
3.		

Administration - User Accounts and Access Permissions FAQs

How do I create an EmployerXG Portal user account for another person?

To become an EmployerXG Portal user, the person must first be set up as a contact. To create a user account for a contact:

1. In EmployerXG Portal, select the **Employer Profile** tab.

2. Locate the contact in the list and click the **Edit** button for that contact.

3. In the Contact **Information** pop-up window, select the **Send portal invitation email**check box and then the user role you want to assign to the selected contact.

4. Click **Save**. The system will send the contact a time-sensitive e-mail that contains the **information** the contact **needs** to set up an account.

What are the access permissions associated with each of the user roles?

The "Administrator" role allows access to the entire EmployerXG Portal site.

The "Operator" role excludes access to the Employer Profile page. Operator has access to all other pages.

The "Operator - No **Bank**" role excludes access to the Employer Profile and **Bank** Account Maintenance pages and suppresses bank account **information** on the History page. Operator has access to all other pages.

The "Operator - History Only" role excludes access to all pages except History and Personal Profile.

Can I re-send a portal invitation e-mail to a contact?

Yes. The "Send portal invitation e-mail" option is always available for contacts who do not already have user accounts. If the contact already has a user account, but doesn't know his/her user name or password, the user should use the Forgot Username or Forgot Password links on the Sign In page to obtain account **information**.

How do I enable or disable a contact's EmployerXG Portal user account?

User account permissions are maintained in the Employer Profile Page. Only users with the Administrator role have access to the Employer Profile page. To enable or disable a contact's user account:

1. In EmployerXG Portal, select the **Employer Profile** tab.

2. Locate the contact in the list and click the **Edit** button for that contact.

3. In the Contact **Information** window, select **Enabled** or **Disabled** in the Account Status list.

Can I change a user's role after a user has created an EmployerXG Portal user account?

Yes. To change the user role for an existing user:

1. In EmployerXG Portal, select the **Employer Profile** tab.

2. Locate the contact in the list and click the **Edit** button for that contact.

3. In the Contact **Information** window, select a different role from the User Role list.

Remittance Payment - Payment Methods

How do I add an employer **bank** account?

To add a **bank** account, click the **Bank Account Maintenance** link that appears at the top of the Payment page. It will open a window where you can enter your **bank** routing number and account number.

Why can't I choose the check payment method?

There are two reasons why the check payment method may not be available to you:

1. The portal administrator has opted not to allow check payment.

2. When you have active **bank** account **information** on file, the system automatically expects an EFT payment.

What should I do if I am paying my remittance by a method other than check or EFT?

To pay by wire, online bill payment or other similar method, select the check payment method and enter your transaction's reference number in the Check Number box.

Why doesn't EFT or my **bank information** appear in the payment method list?

There are three reasons why the check payment method may not be available to you:

1. The EmployerXG Portal administrator has opted not to allow EFT payment.

2. The EmployerXG Portal administrator has not yet validated your **bank information**.

3. Your **bank information** on file is in an "inactive" status.

How do I add or change my **bank** account **information**?

When the EmployerXG Portal administrator has opted to allow EFT payments, a link to the **Bank** Account Maintenance window appears at the top of the Payment page. Click the link and enter or change your **banking information**.