EmployerXG V2

QuickGuide

August 2016

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

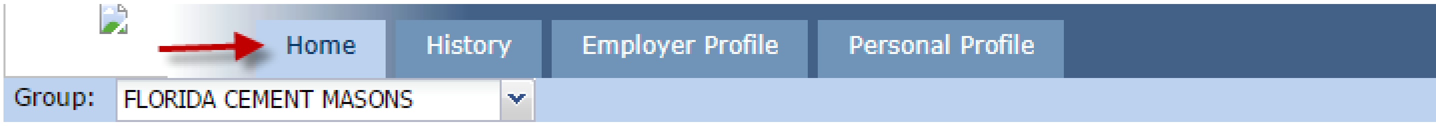
Screens

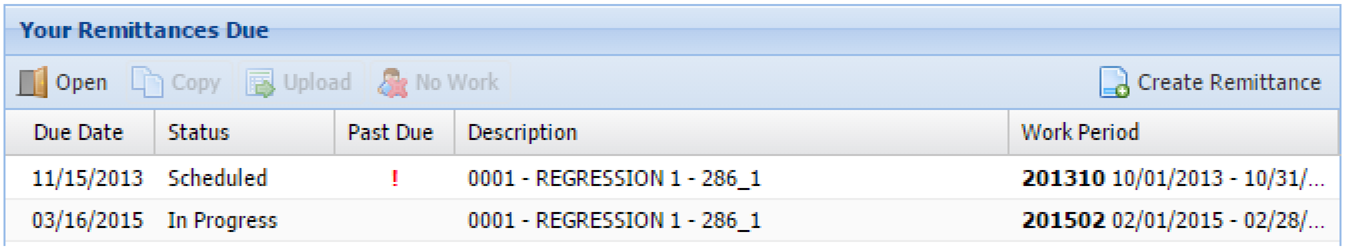
EmployerXG contains the following screens.

- **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

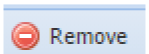
- Open a remittance
- Copy an existing remittance
- Upload a remittance file and receive progress information on the upload
- Create a No Work remittance
- Create a new remittance
- Access valuable News and Information

Open a remittance

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

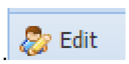
Remove employee from remittance

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**.



Edit employee information on a remittance

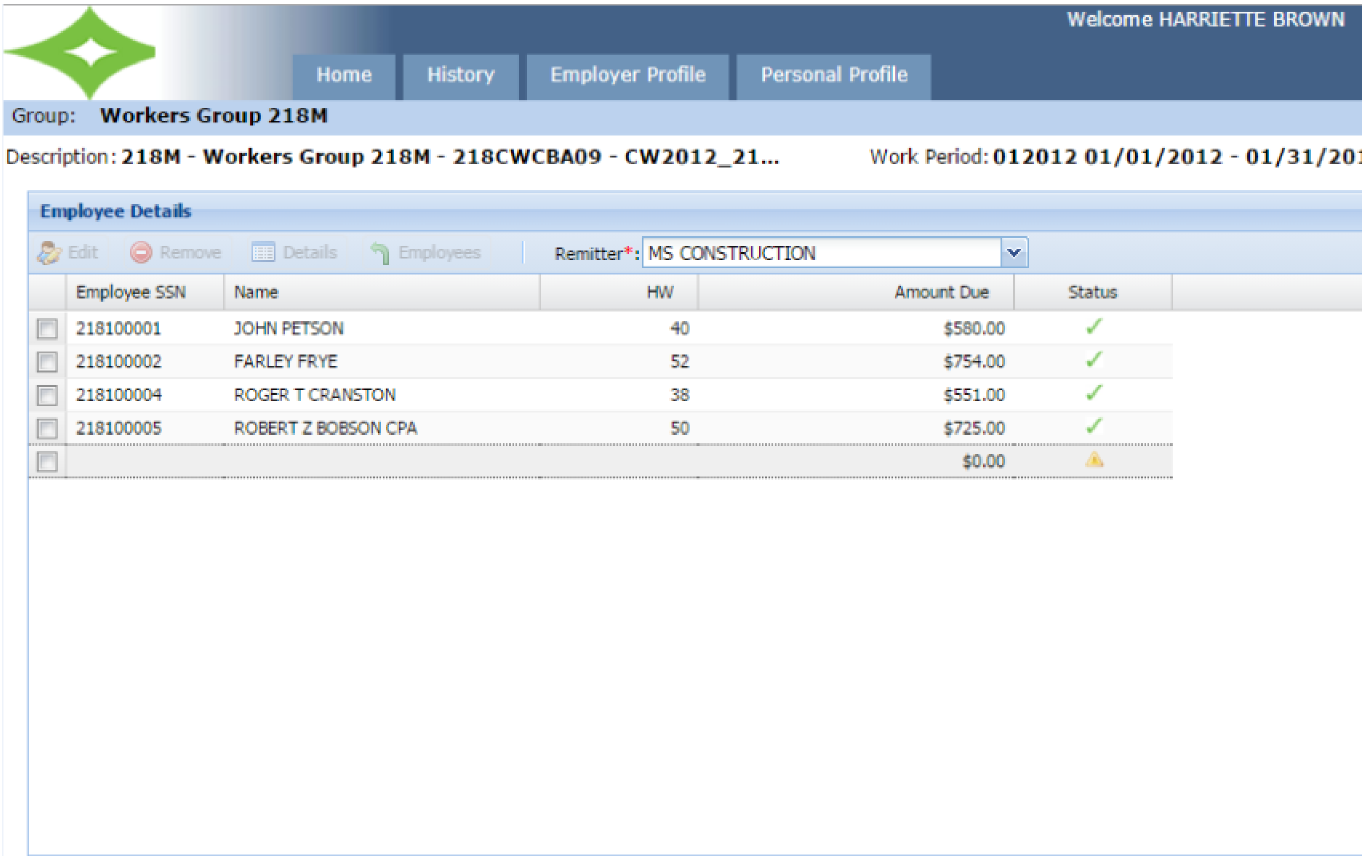
1. Select the remittance in which you want to edit new employee information and then click **Open**.
2. Select the employee whose information you want to edit and click **Edit**.



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).

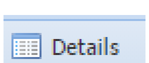


2. Enter the **SSN** number of the employee that you want to add to the remittance and press **Enter** or the Tab key.
3. At a minimum, complete the required fields which are indicated by an asterisk.
4. Click **Save**.
5. Enter the necessary information, for example, **HW.**
6. Click the **Pay** button, if desired.

Note: You can select another employer to which to add a new employee. Use the **Remitter** dropdown menu located above and to the right of the Employee Details table and select the desired employer from the list of employers (see previous screen example where MS CONSTRUCTION is the selected employer). The name of the Remitter field is based on the configuration set in the EmployerXG Administrator's tool. Employers must be configured in ContributionsXG to use the Remitter field.

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**.

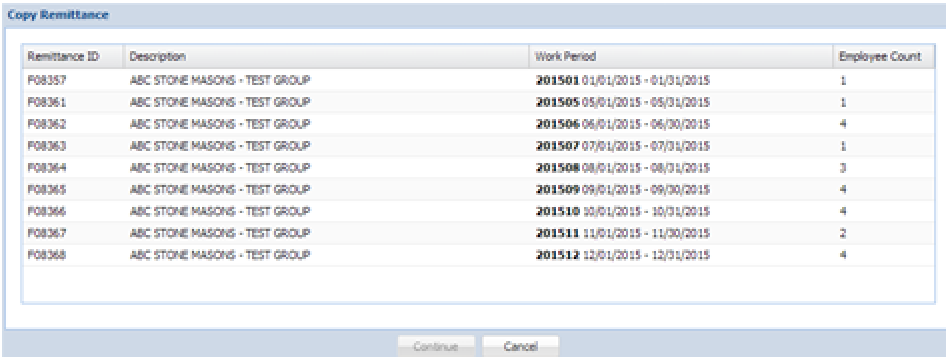


Copy an existing remittance

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

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

   Copy Remittance

Remittance ID	Description	Work Period	Employee Count
F08357	ABC STONE MASONS - TEST GROUP	**201501** 01/01/2015 - 01/31/2015	1
F08361	ABC STONE MASONS - TEST GROUP	**201505** 05/01/2015 - 05/31/2015	1
F08362	ABC STONE MASONS - TEST GROUP	**201506** 06/01/2015 - 06/30/2015	4
F08363	ABC STONE MASONS - TEST GROUP	**201507** 07/01/2015 - 07/31/2015	1
F08364	ABC STONE MASONS - TEST GROUP	**201508** 08/01/2015 - 08/31/2015	3
F08365	ABC STONE MASONS - TEST GROUP	**201509** 09/01/2015 - 09/30/2015	4
F08366	ABC STONE MASONS - TEST GROUP	**201510** 10/01/2015 - 10/31/2015	4
F08367	ABC STONE MASONS - TEST GROUP	**201511** 11/01/2015 - 11/30/2015	2
F08368	ABC STONE MASONS - TEST GROUP	**201512** 12/01/2015 - 12/31/2015	4

   Continue Cancel

   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.

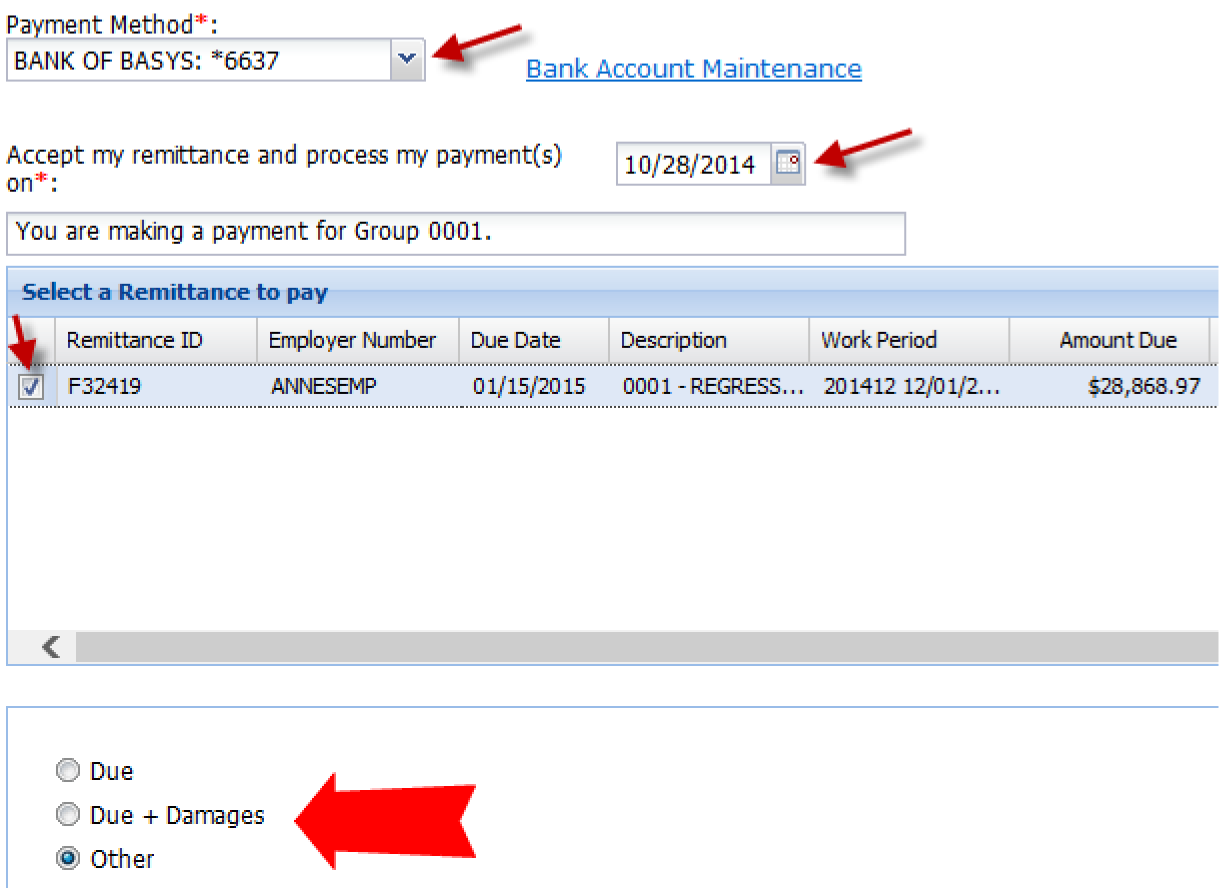
1. From the **Your Remittances Due** table, select the remittance that you want to upload and then click **Upload**.
2. Browse to the file that you want to upload, select the file, and click **Upload File** .

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.

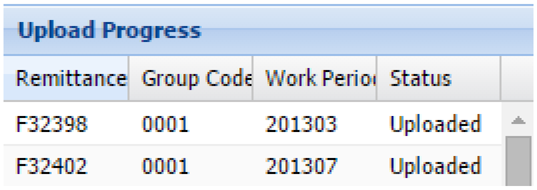
   The screen looks like this (example).



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.

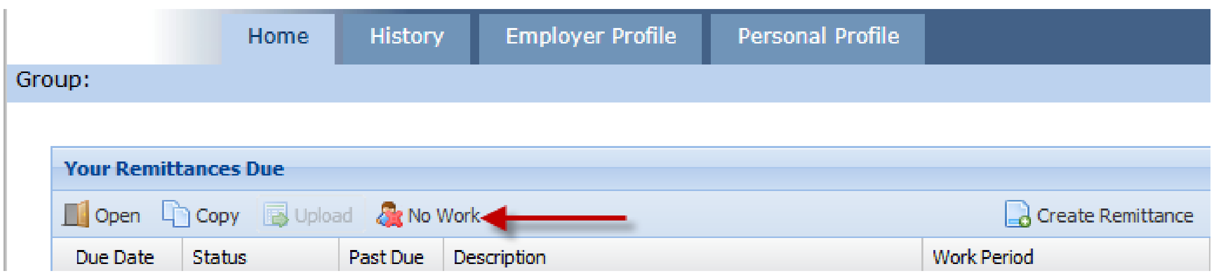
You can view the progress of the upload from the **Home** screen in the **Upload Progress** table (see following example).



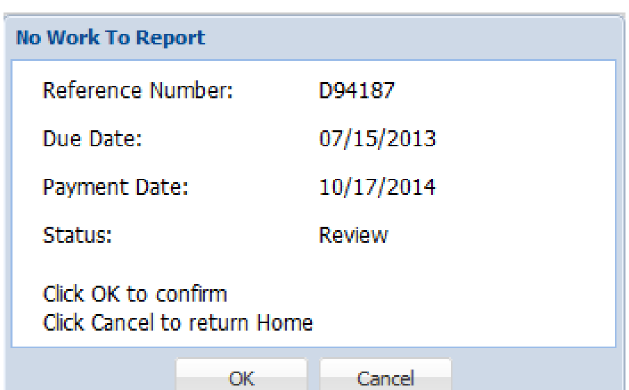
The status can be "Uploading," "Uploaded," or "Error." After payment has been made, the uploaded information no longer displays in the table.

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.



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

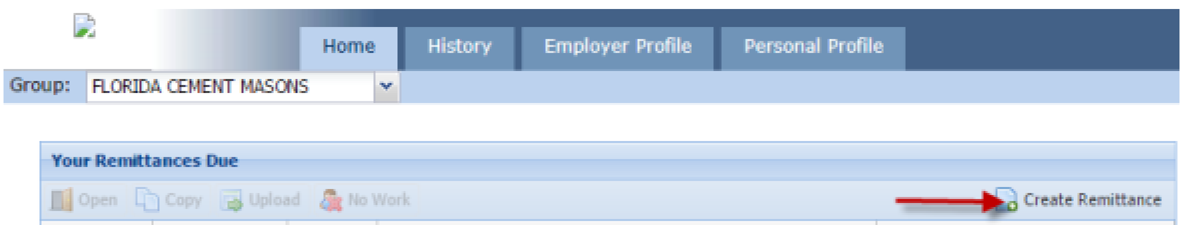
Remittance Confirmation

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

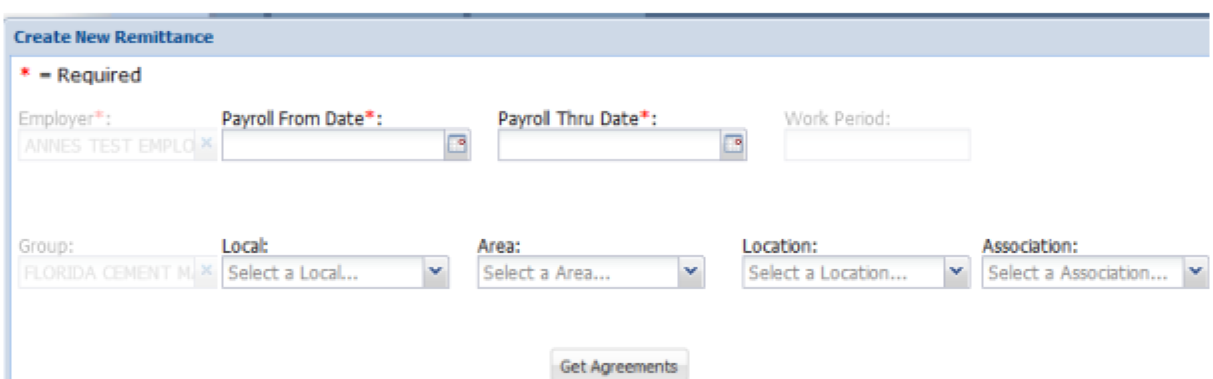
Generated on: 10/21/2014

Create a new remittance

1. From the **Your Remittances Due** table, click **Create Remittance**.



The **Create New Remittance** screen displays.



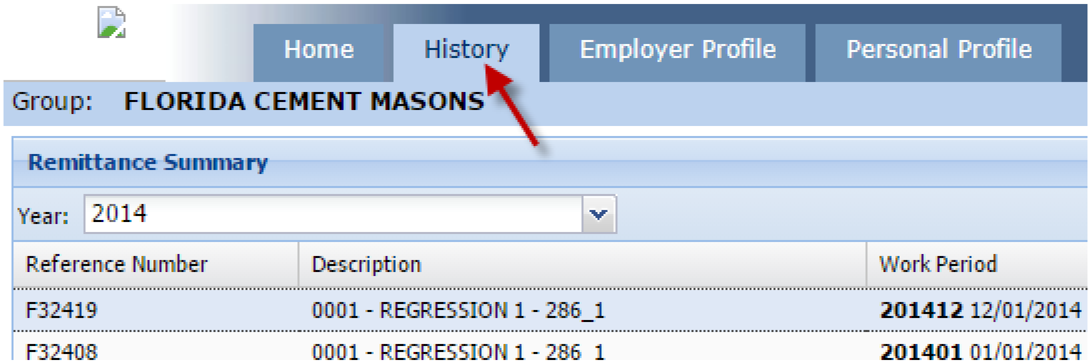
2. At a minimum, enter information into the **Payroll From Date** and **Payroll Thru Date** fields in MM/DD/YYYY format or use the calendar icon to the right of each Payroll field to select the dates.
3. Click **Get Agreements**.

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).

LOCAL 0003 DISTRICT COUNCIL

Remittance Receipt

Employer Code:	128600001	*Reference Number:*
Employer Name:	ITS REGRESSION TIME	*Agreement:*
County:	ITS REGRESSION TIME	*Contract:*
Scheduled Date:	N/A	*Due Date:*
Payroll Dates:	6/1/2013 - 6/30/2013	*Report Period:*
Payment Method:	EFT-****9045	*Payment Date:*
Check #:	N/A	
Grand Total:	$43,913.60	*User Name:*
		Contact Name:

Fund	Amount Due	Damage Due	Total Due
ANNUITY FUND	2783.46	6012.11	8795.57
PENSION FUND	12524.34	22543.69	35068.03
PORT SUPP TEST	50.00	0.00	50.00
Total:	**$15,357.80**	**$28,555.80**	**$43,913.60**

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.

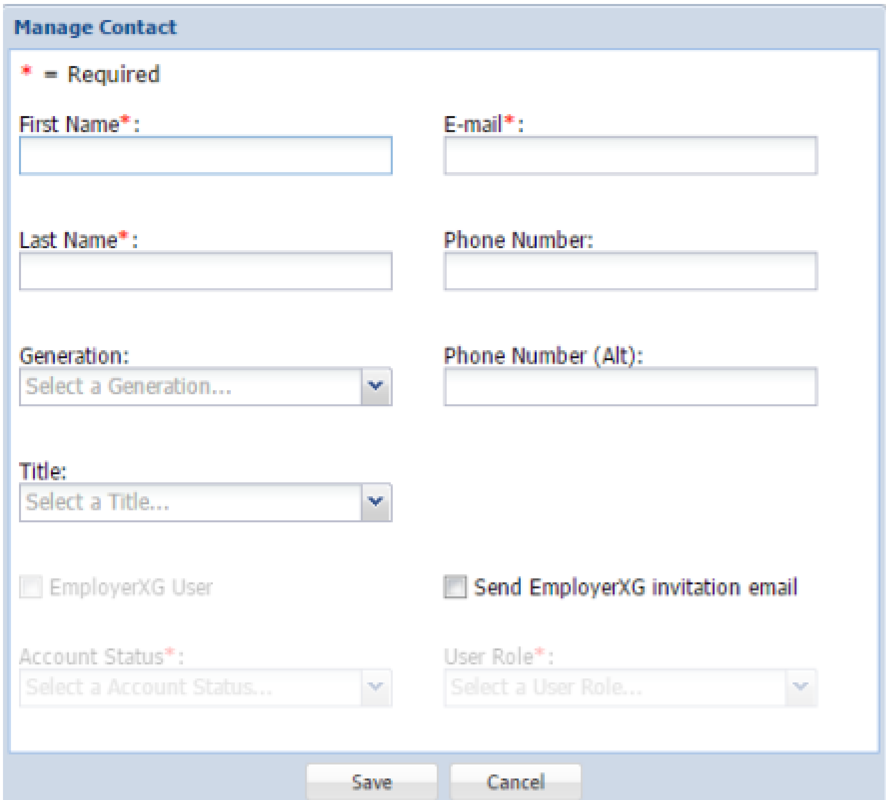
From the **Employer Profile** tab screen, you can

- 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.



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.

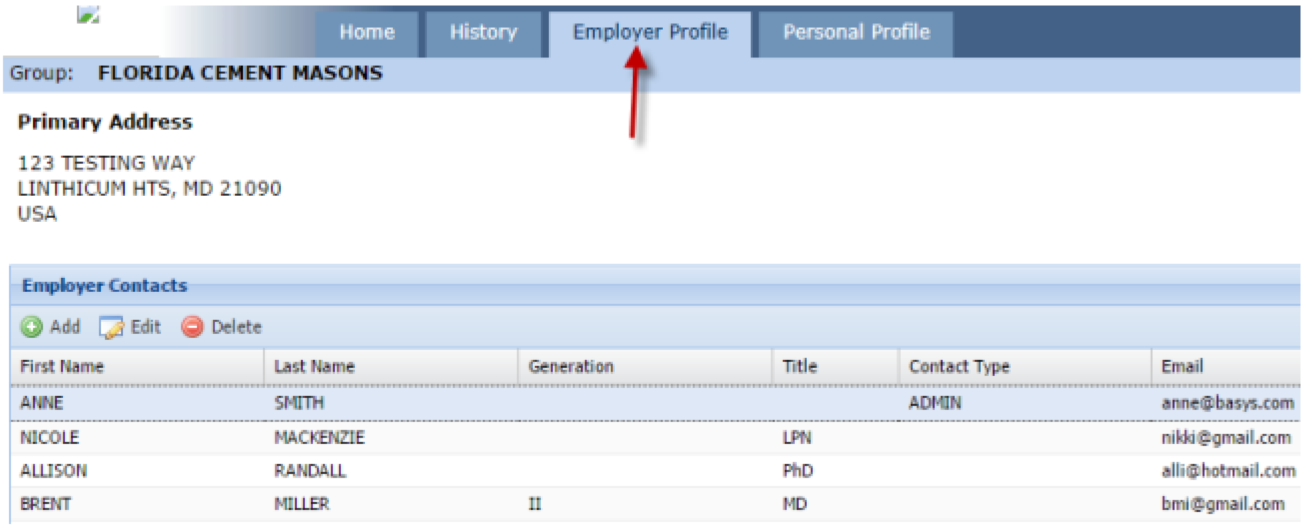
   Also, after selecting the **Send EmployerXG invitation email** checkbox, the **User Role** field will become enabled. Use the User Role dropdown menu to select the appropriate role for the contact.

4. Click **Save**.

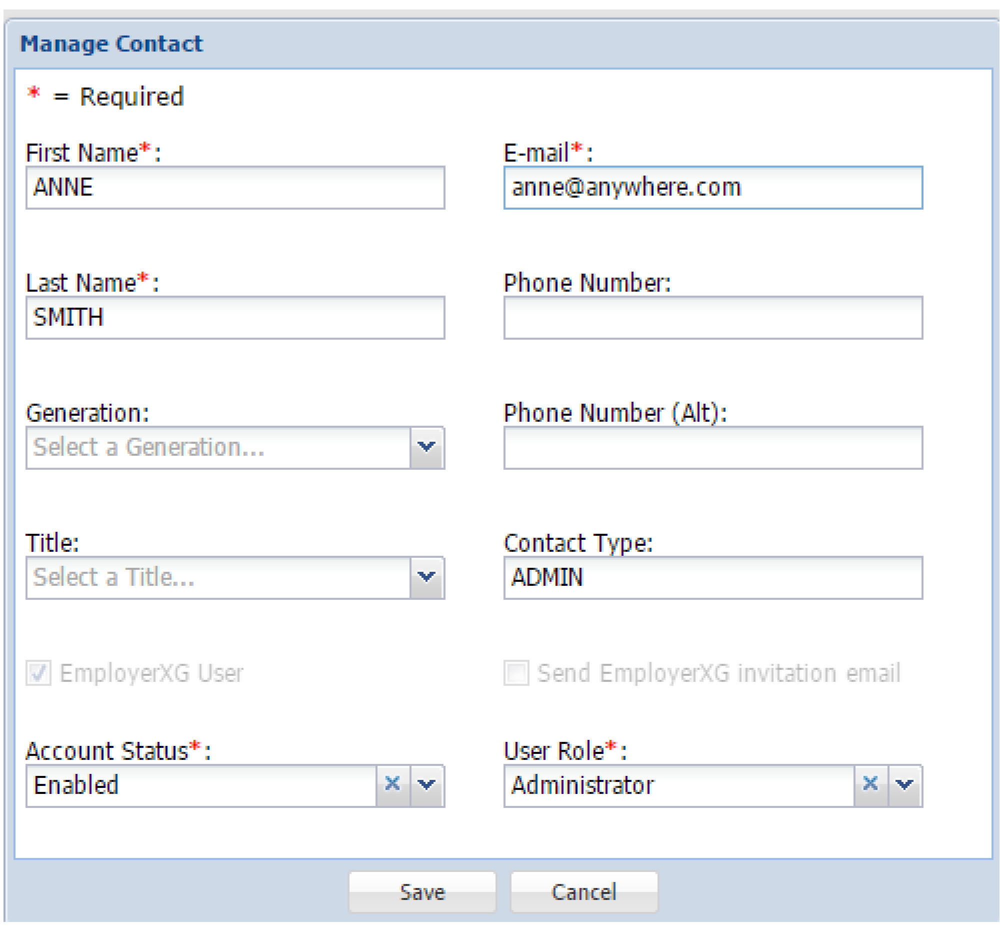
Edit employer contact information

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).



2. Select the contact whose information you want to edit.
3. Click **Edit** and the Manage Contact screen displays (example).

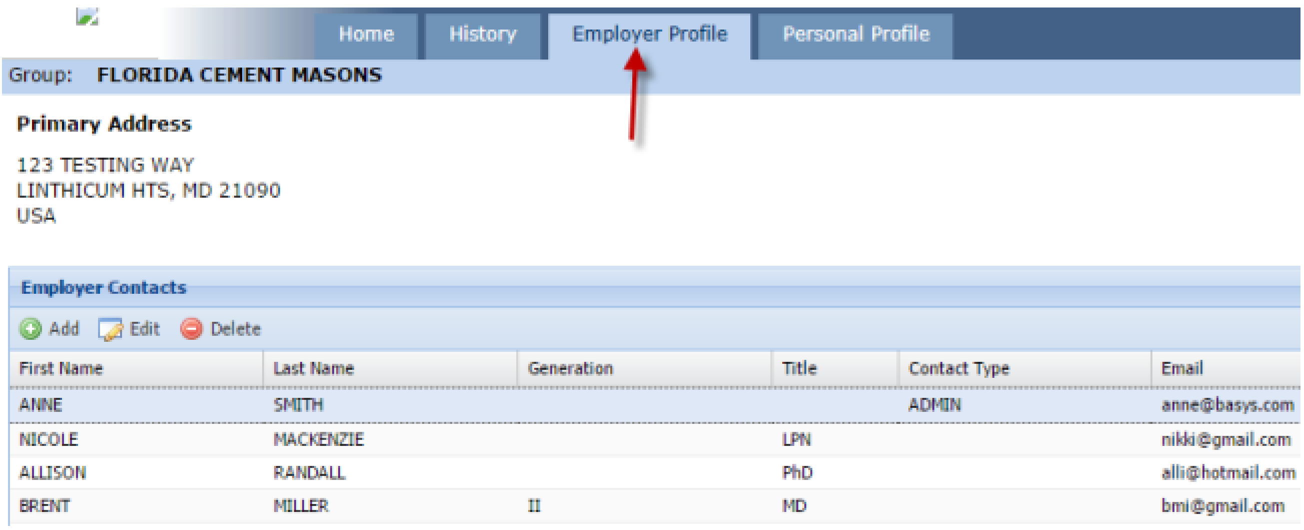


4. On the **Manage Contact** screen, update contact information as necessary and click **Save**.
5. Click **OK**.

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).

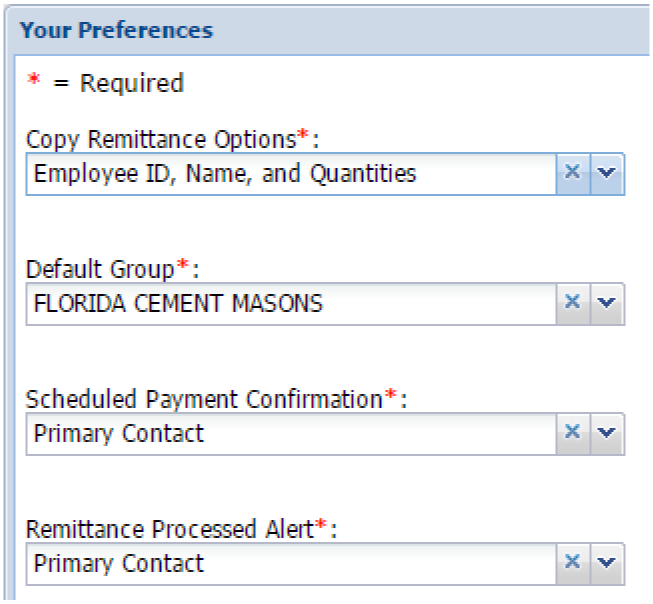


2. Select the contact whose information you want to delete.
3. Click **Delete**.

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.



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

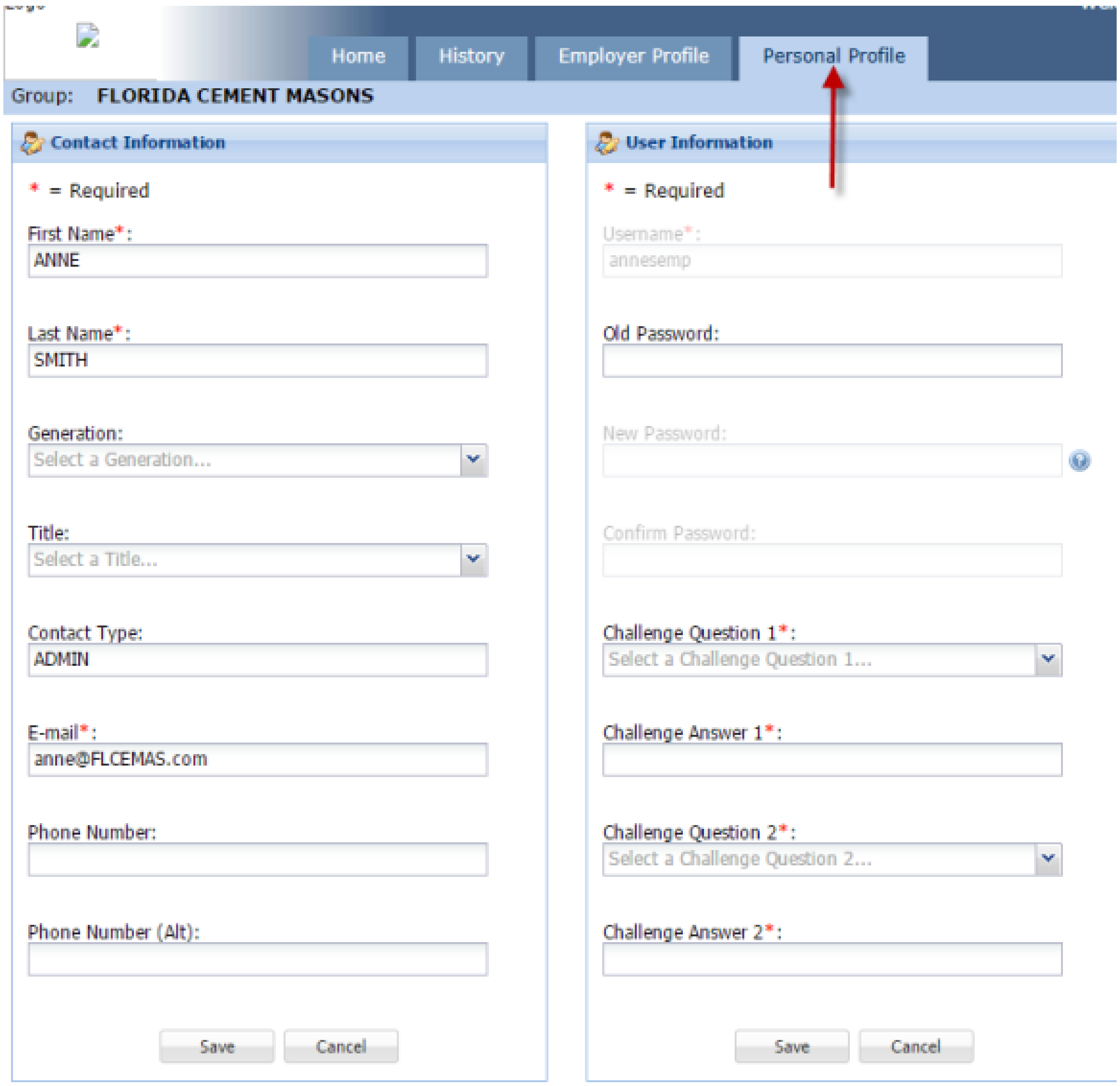
Note: You must have bank permissions to add, update, and delete bank information. Also, if only a check payment if configured for your company, you may not be able to perform these actions.

1. Select the **Employer Profile** tab.
2. Click the **Your Bank Account** link at the top right of the screen.

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

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