



EmployerXG

QuickGuide

April 2017

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Introduction

The **EmployerXG** portal offers you

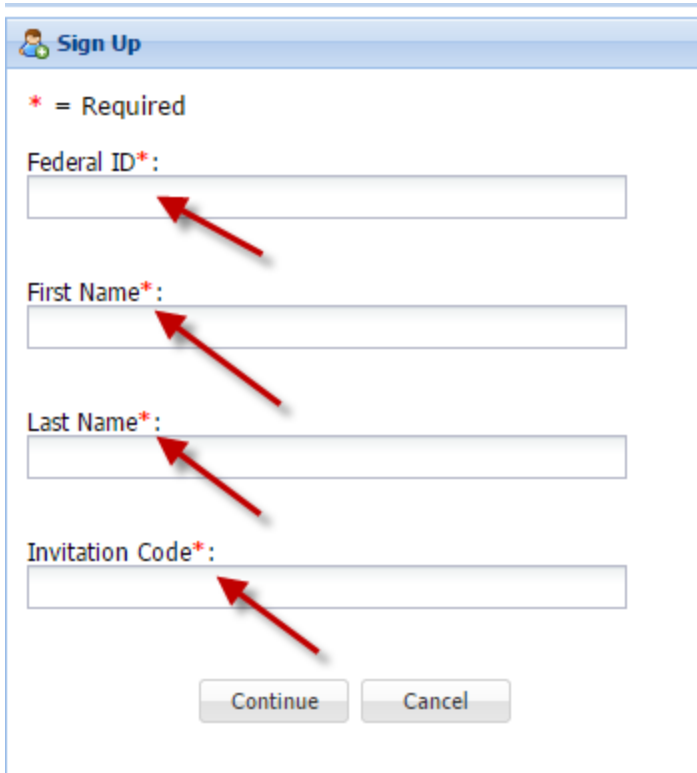
- Remittance data entry and payment using the Internet
- Self-service access to remittance history
- Self-service address and contact maintenance

The **EmployerXG** 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 have access to all screens.

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.



Sign Up

* = Required

Federal ID*:

First Name*:

Last Name*:

Invitation Code*:

Continue Cancel

3. Enter your **Federal ID** number (with no dash).
4. Enter your **First Name** and **Last Name** exactly as it appears on your Portal Authorization sheet.
5. Enter the **Invitation Code**. **Note:** It is recommended that you copy and paste this code from the invitation email that was sent to you since the code is case-sensitive.
6. Click the **Continue** button and the screen changes to display user credential fields (see following screen).

Sign Up

* = Required

Username*:

Password*:

Confirm Password*:

Challenge Question 1*:
Select a Challenge Question 1...

Challenge Answer 1*:

Challenge Question 2*:
Select a Challenge Question 2...

Challenge Answer 2*:

☐ Yes, I agree to the [Terms of Use](#)

Why Sign Up?

- ✓ All you need is an Internet
- ✓ You're in control. You tell u
- ✓ Spend more time working a
- ✓ Getting started takes less !

Password rules

- Minimum - 8 characters
- Maximum - 25 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- Allowed special characters are -

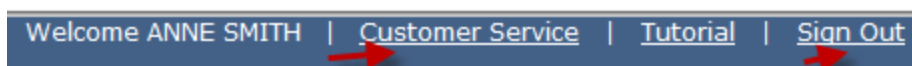
!@#\$%^&*~

7. Enter your **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. Select your **Challenge Questions** and **Answers**.
9. View the **Terms of Use** and select the "Yes, I agree to the Terms of Use" checkbox.
Your account is created and you may sign in.

Toolbar

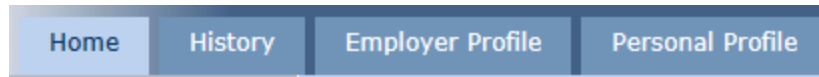
The Tool Bar contains the following options (see screen example).

- **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).

Your Remittances Due				
 Open  Copy  Upload  No Work				
Ref No	Due Date	Status	Past Due	Employer Number
D89417	02/15/2010	In Cart	!	128600000
F63447	08/15/2017	In Progress		128600000
F63445	06/15/2017	In Progress		128600000
F63443	04/15/2017	In Progress		128600000
F63442	03/15/2017	In Progress		128600000

Note that years without remittances do not display in the listing.

From the **Home** screen, you can

- Open a remittance
- Copy an existing remittance
- Create a No Work remittance
- Create a new remittance
- View remittances that have been submitted (replaces the file uploads that used to display above the News & Information box)
- Access remittance details on the History tab
- View remittances that are in your Cart or that are Saved for Later
- Access valuable links such as news and events

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.

The list of remittances for your group displays in the **Your Remittances Due** table. **Note:** Delinquent remittances are indicated by a red exclamation mark.

2. From the **Your Remittances Due** table, select the remittance that you want to view and then click the **Open** icon above the **Due Date** column heading. You can also double-click the remittance and not use the **Open** icon.

If you click on a remittance that is "*In Progress*," you are returned to the last screen you accessed.

If you click on a remittance that is "*Due*," the **Employee Details** table displays with a blank **Employee ID** field highlighted.(example).



Welcome COURTNEY JOHANSSON|Customer

Home

History

Employer Profile

Personal Profile

Group: FLORIDA CEMENT MASONS

REGRE

Description: 286_1 - 0001

Work Period: 201002 02/01/2010 - 02/28/2010

Refere

Employee Details

 Edit

 Remove

 Details

 Employees

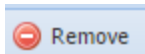
Comment:

(Maximum Characters: 255)

	Employee ID	Name	HW	G.WAGE	Amount Due	Status
☐	*****0211	TARA JONES	160	3500.23	\$34,501.22	✓
☐	*****0655	HUBERT HENDERSON	172.75	5930.22	\$57,210.70	✓
☐	*****0544	JULIA LEBOWITZ	110	2200.8	\$21,811.71	✓
☐	*****0002	SARAH SINGLE	100	1500	\$15,182.48	✓
☐	*****0433	ERIC HERMAN DETTWEILER 3RD	80	780.83	\$8,256.42	✓
☐	*****0322	MARCUS JENKINS	150.5	4350.75	\$42,273.32	✓
☐					\$0.00	⚠

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 an existing 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.

The list of remittances for your group displays in the **Your Remittances Due** table.

2. From the **Your Remittances Due** table, click once on the remittance in which you want to edit new employee information and then click the **Open** icon above the **Due Date** column heading. You can also double-click the remittance and not use the **Open** icon.

If you click on a remittance that is "*In Progress*," you are returned to the last screen you accessed.

If you click on a remittance that is "*Due*," the **Employee Details** table displays with a blank **Employee SSN** field highlighted (example).

Welcome COURTNEY JOHANSSON | Customer

Home History Employer Profile Personal Profile

Group: **FLORIDA CEMENT MASONS** REGRE

Description: **286_1 - 0001** Work Period: **201002 02/01/2010 - 02/28/2010** Refere

Employee Details

Edit Remove Details Employees Comment: (Maximum Character:)

Employee ID	Name	HW	G.WAGE	Amount Due	Status
*****0211	TARA JONES	160	3500.23	\$34,501.22	✓
*****0655	HUBERT HENDERSON	172.75	5930.22	\$57,210.70	✓
*****0544	JULIA LEBOWITZ	110	2200.8	\$21,811.71	✓
*****0002	SARAH SINGLE	100	1500	\$15,182.48	✓
*****0433	ERIC HERMAN DETTWEILER 3RD	80	780.83	\$8,256.42	✓
*****0322	MARCUS JENKINS	150.5	4350.75	\$42,273.32	✓
				\$0.00	⚠

3. Select the employee whose information you want to edit and click the **Edit** icon above the **Employee SSN** column heading.

Welcome COURTNEY JOHANSSON | Customer

Home History Employer Profile Personal Profile

Group: **FLORIDA CEMENT MASONS** REGRE

Description: **286_1 - 0001** Work Period: **201002 02/01/2010 - 02/28/2010** Refere

Employee Details

Edit Remove Details Employees Comment: (Maximum Character:)

Employee ID	Name	HW	G.WAGE	Amount Due	Status
*****0211	TARA JONES	160	3500.23	\$34,501.22	✓
*****0655	HUBERT HENDERSON	172.75	5930.22	\$57,210.70	✓
*****0544	JULIA LEBOWITZ	110	2200.8	\$21,811.71	✓
*****0002	SARAH SINGLE	100	1500	\$15,182.48	✓
*****0433	ERIC HERMAN DETTWEILER 3RD	80	780.83	\$8,256.42	✓
*****0322	MARCUS JENKINS	150.5	4350.75	\$42,273.32	✓
				\$0.00	⚠

4. A **Create Employee** popup displays populated with the information of the employee you selected (example).

Create Employee

* = Required

Employee ID:

128600000

☐ Canadian SIN

Prefix:

Ms.

x

v

First Name*:

JULIA

Last Name*:

BARLOWE

Middle Name:

MARIE

Generation:

Select a Generation...

v

Title:

MD

x

v

Gender:

Female

x

v

Email Address:

Phone Number:

Birth Date*:

10/13/2014

Local:

LOCAL 0069

v

Hire Date:

Country Code:

USA

x

v

Street Address 1:

1 ORCHARD STREET

Street Address 2:

City:

BALTIMORE

State:

MD - MARYLAND

x

v

Zip Code:

21207

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

Add a new employee to an existing remittance

- From the **Your Remittances Due** table, click once on the remittance to which you want to add a new employee and then click the **Open** icon above the **Due Date** column heading. You can also double-click the remittance and not use the **Open** icon.

If you click on a remittance that is "*In Progress*," you are returned to the last screen you accessed.

If you click on a remittance that is “Due,” the **Employee Details** table displays with a blank **Employee SSN** field highlighted (example).

Group: **0002 - GROUP 0002**

Description: **REGRESSION 1 - 286_1 - 286_1**

Employee Details				
 Edit	 Remove	 Details	 Employees	
	Employee ID	Name	Member Status	Status Date
☐	218100001	John Petson	APPRENTICE	2017/03/07
☐	218100002	FARLEY FRYE	APPRENTICE	2017/03/06
☐	218100004	Roger T Cranston	APPRENTICE	2017/03/07

2. Enter the **Employee ID** of the employee that you want to add to the remittance and press **Enter**.

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

4. Click **Save**.

The system fills in the **Name** field and highlights the **HW** field in the Employee Details table.

5. Enter the **HW**.

The system automatically enters the **Amount Due** and the **Status**, and displays another blank **Employee Detail** row into which you can add another employee.

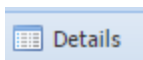
The system also updates the **Remittance Summary** table at the bottom of the screen with newly-added employee information. You can display the summary by **Fund**, **Quantity**, or **Rate**. You can also export employee information by using the **Export** button. The information is exported in .csv format.

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 the first 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**.



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.

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**.

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 **Add To Cart** button.
5. Proceed to your Cart or Return Home to complete additional Remittances.

Upload and pay a remittance

Note: You can only upload “Due” remittances if your system is configured to allow it.

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**. The first fifteen rows of data display for verification.



3. Click the **Next** button in the Wizard. Your data is analyzed and calculated, and the Employee Details screen for the remittance displays.
4. At the bottom of the **Employee Details** screen, click **Add To Cart - Proceed to Cart**.
5. Set the payment details **In Cart** (Due, Due+Damages, Other).
6. Verify Payment Summary.
7. Click **Apply Payment**.
8. Navigate to History page.
9. Select the remittance.
10. Click **Confirmation**.

Create a No Work remittance

1. Select the Due remittance(s) to which you want to apply No Work.
2. Click **No Work**.

Your Remittances Due				
Open Copy Upload No Work				
☐	Ref No	Due Date	Status	Past Due
☐	D67031	2014/01/15	In Progress	!
☒	D67030	2013/12/15	Due	!
☒	D67029	2013/11/15	Due	!
☐	D67028	2013/10/15	Due	!

The **No Work To Report** popup box displays (see following screen). Note that the No Work option is disabled for remittances that are In Progress.

No Work To Report

You have selected 2 due remittance(s). Would you like to submit a no work report for each?

If you click "Yes," you receive the following popup (see following screen). (If you select "No," the selected remittance are not submitted with no work.)

No Work To Report ✕

The selected remittances have been submitted with no work. You can view and print a detailed receipt from the History tab.

3. If you have selected "Yes," click **OK** and click the History tab if you want to view or print the PDF receipt for each remittance.
4. Open the PDF to view the **Remittance Receipt** (see following screen example).

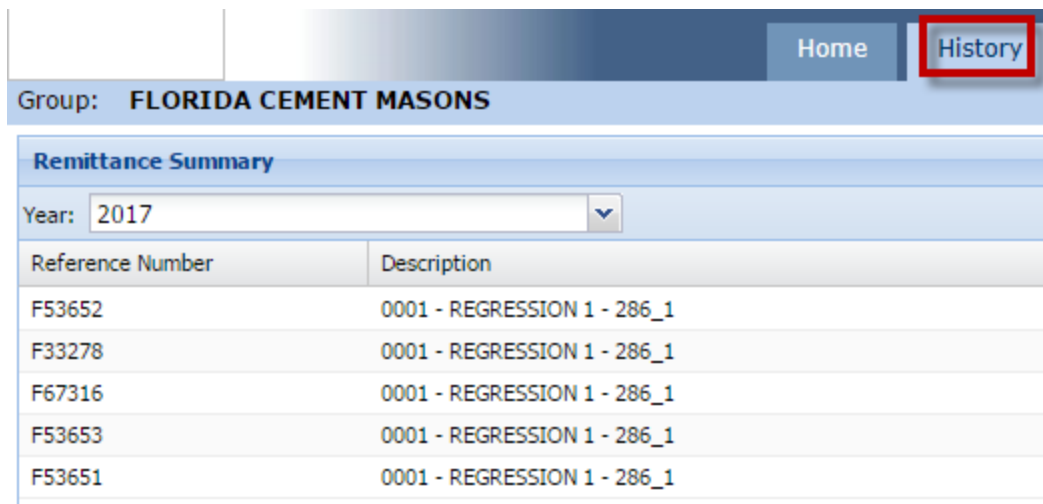
OP. PLASTERERS & CEM. MASONS **Remittance Receipt**

Employer Code:	128600000	Reference Number:	F63458
Employer Name:	REGRESSION COMPANY	Agreement:	286SHIFT
Remitter Override:	REGRESSION COMPANY	Contract:	286SHIFT
Scheduled Date:	N/A	Due Date:	7/15/2016
Payroll Dates:	6/1/2016 - 6/30/2016	Report Period:	201606
Payment Method:	EFT-***3567	Payment Date:	3/31/2017
Check #:	N/A		
Grand Total:	\$0.00	User Name:	REGRESSION1
		Contact Name:	COURTNEY JOHANSSON

Fund	Amount Due	Damage Due	Total Due	Amount Paid
ANN-FND	0.00	0.00	0.00	0.00
Total:	\$0.00	\$0.00	\$0.00	\$0.00

History

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



The screenshot shows a web application interface. At the top, there are two tabs: 'Home' and 'History'. The 'History' tab is selected and highlighted with a red rectangle. Below the tabs, there is a header bar that says 'Group: FLORIDA CEMENT MASONS'. Underneath this, there is a section titled 'Remittance Summary'. This section contains a 'Year:' dropdown menu set to '2017'. Below the dropdown is a table with two columns: 'Reference Number' and 'Description'. The table contains five rows of data, all with the same description: '0001 - REGRESSION 1 - 286_1'.

Reference Number	Description
F53652	0001 - REGRESSION 1 - 286_1
F33278	0001 - REGRESSION 1 - 286_1
F67316	0001 - REGRESSION 1 - 286_1
F53653	0001 - REGRESSION 1 - 286_1
F53651	0001 - REGRESSION 1 - 286_1

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
- Access submitted remittances history

View and print a remittance receipt

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 processed 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. Double-click the PDF receipt file at the bottom left of the screen, and the following receipt displays (example).

OP. PLASTERERS & CEM. MASONS

Remittance Receipt

Employer Code:	128600000	Reference N
Employer Name:	REGRESSION COMPANY	Agreement:
Remitter Override:	REGRESSION COMPANY	Contract:
Scheduled Date:	N/A	Due Date:
Payroll Dates:	7/1/2016 - 7/31/2016	Report Perio
Payment Method:	Check	Payment Dai
Check #:	EFT	
Grand Total:	\$0.00	User Name:
		Contact Nam

Fund	Amount Due	Damage Due	Total
ANN-FND	0.00	0.00	
Total:	\$0.00	\$0.00	

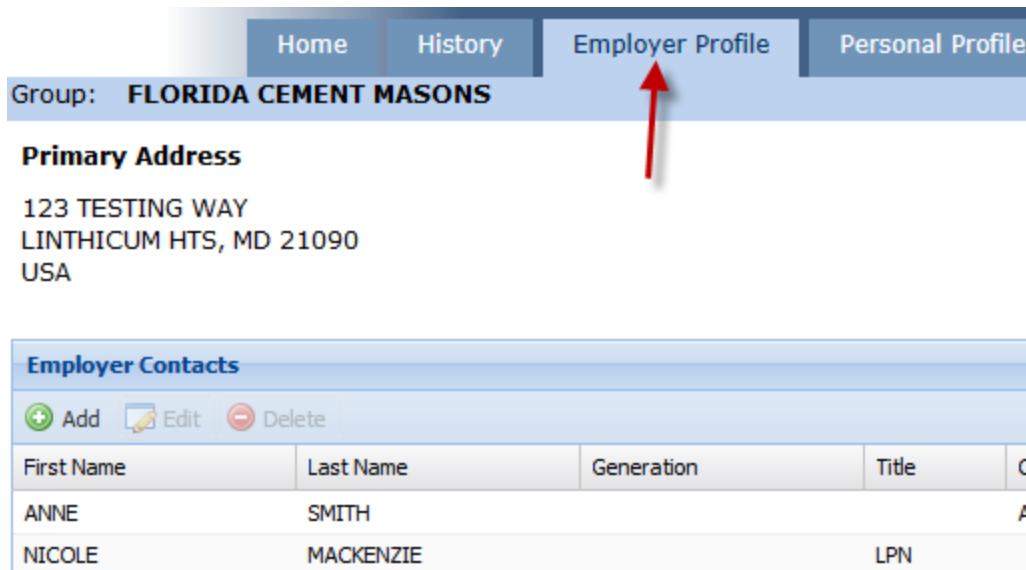
Access an Excel listing of employees associated with a selected remittance

1. Select the **History** tab.
2. Select the desired remittance from the **Remittance Summary** table.
3. Click **Employees**.
4. Click **Open**.

An 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.



The screenshot shows the 'Employer Profile' tab selected in a navigation bar. Below the navigation bar, the group name 'FLORIDA CEMENT MASONS' is displayed. Under the 'Primary Address' section, the address is listed as '123 TESTING WAY, LINTHICUM HTS, MD 21090, USA'. Below this, the 'Employer Contacts' section features a table with columns for First Name, Last Name, Generation, Title, and a status indicator. Two contacts are listed: ANNE SMITH (status A) and NICOLE MACKENZIE (status LPN). Above the table are buttons for Add, Edit, and Delete.

First Name	Last Name	Generation	Title	
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):

Title:

☐ EmployerXG User ☐ Send EmployerXG invitation email

Account Status*:

User Role*:

Save Cancel

- 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.
- 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.

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

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

Manage Contact

* = Required

First Name*:
 E-mail*:

Last Name*:
 Phone Number:

Generation:
 Phone Number (Alt):

Title:
 Contact Type:

☒ EmployerXG User
 ☐ Send EmployerXG invitation email

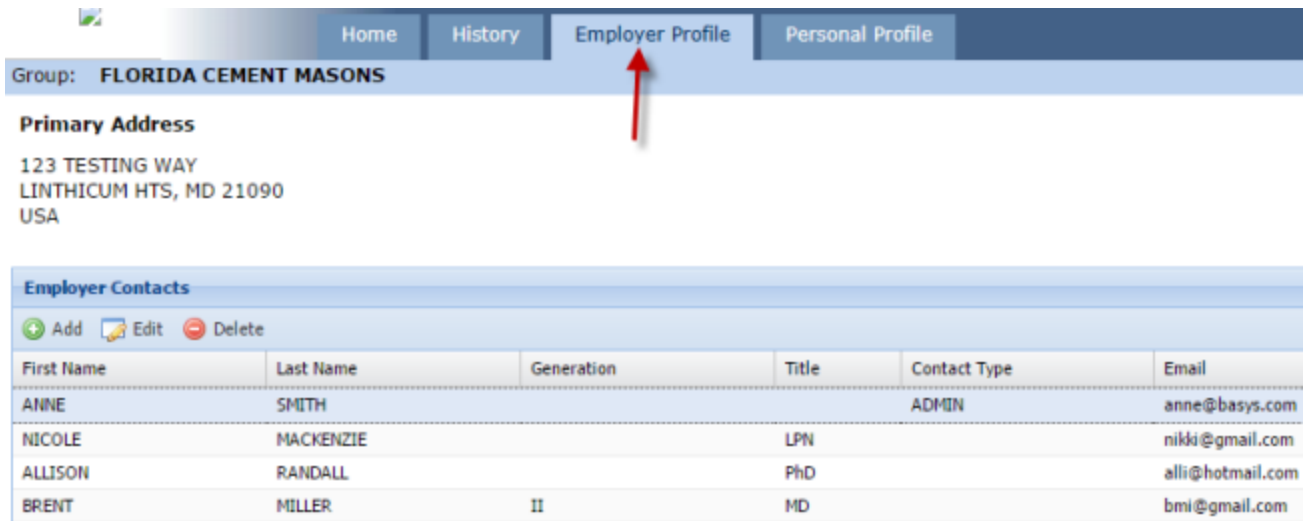
Account Status*:
 User Role*:

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.

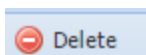
1. Select the **Employer Profile** tab and the **Employer Contacts** screen displays (example).



The screenshot shows the 'Employer Profile' tab selected in the top navigation bar. Below the navigation bar, the group name 'FLORIDA CEMENT MASONS' is displayed. Under 'Primary Address', the address is listed as '123 TESTING WAY, LINTHICUM HTS, MD 21090, USA'. Below this, the 'Employer Contacts' section is shown, featuring a table with columns for First Name, Last Name, Generation, Title, Contact Type, and Email. The table contains four rows of contact information. Above the table, there are buttons for 'Add', 'Edit', and '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		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 is 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**.

Personal Profile

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

The screenshot shows a web application interface for a group named "FLORIDA CEMENT MASONS". The top navigation bar includes tabs for "Home", "History", "Employer Profile", and "Personal Profile". A red arrow points to the "Personal Profile" tab. Below the navigation bar, the "Contact Information" section is active, displaying a form with the following fields:

- * = Required**
- First Name*:** ANNE
- Last Name*:** SMITH
- Generation:** Select a Generation... (dropdown menu)
- Title:** Select a Title... (dropdown menu)
- Contact Type:** ADMIN
- E-mail*:** anne@FLCEMAS.com
- Phone Number:** (empty text box)
- Phone Number (Alt):** (empty text box)
- Save** and **Cancel** buttons.

The "User Information" section is also visible, containing the following fields:

- * = Required**
- Username*:** annesemp
- Old Password:** (empty text box)
- New Password:** (empty text box with a help icon)
- Confirm Password:** (empty text box)
- Challenge Question 1*:** Select a Challenge Question 1... (dropdown menu)
- Challenge Answer 1*:** (empty text box)
- Challenge Question 2*:** Select a Challenge Question 2... (dropdown menu)
- Challenge Answer 2*:** (empty text box)
- Save** and **Cancel** buttons.

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

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