EmployerXG Setup and Navigation Guide

Version: 4

Introduction

The Setup and Navigation guide covers everything you need to know about using the EmployerXG portal, including signing up, logging in, setting up essential settings and defaults, and navigating the site.

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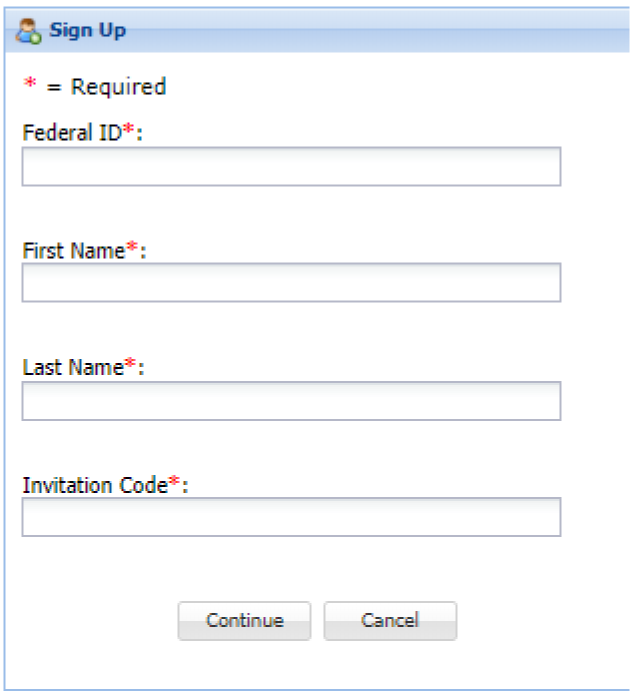
Sign up

You'll need to create an account to begin using the portal. This helps maintain your security and privacy. Reference the invitation you received with the invitation code. If you didn't receive an invitation code, contact your administrator.

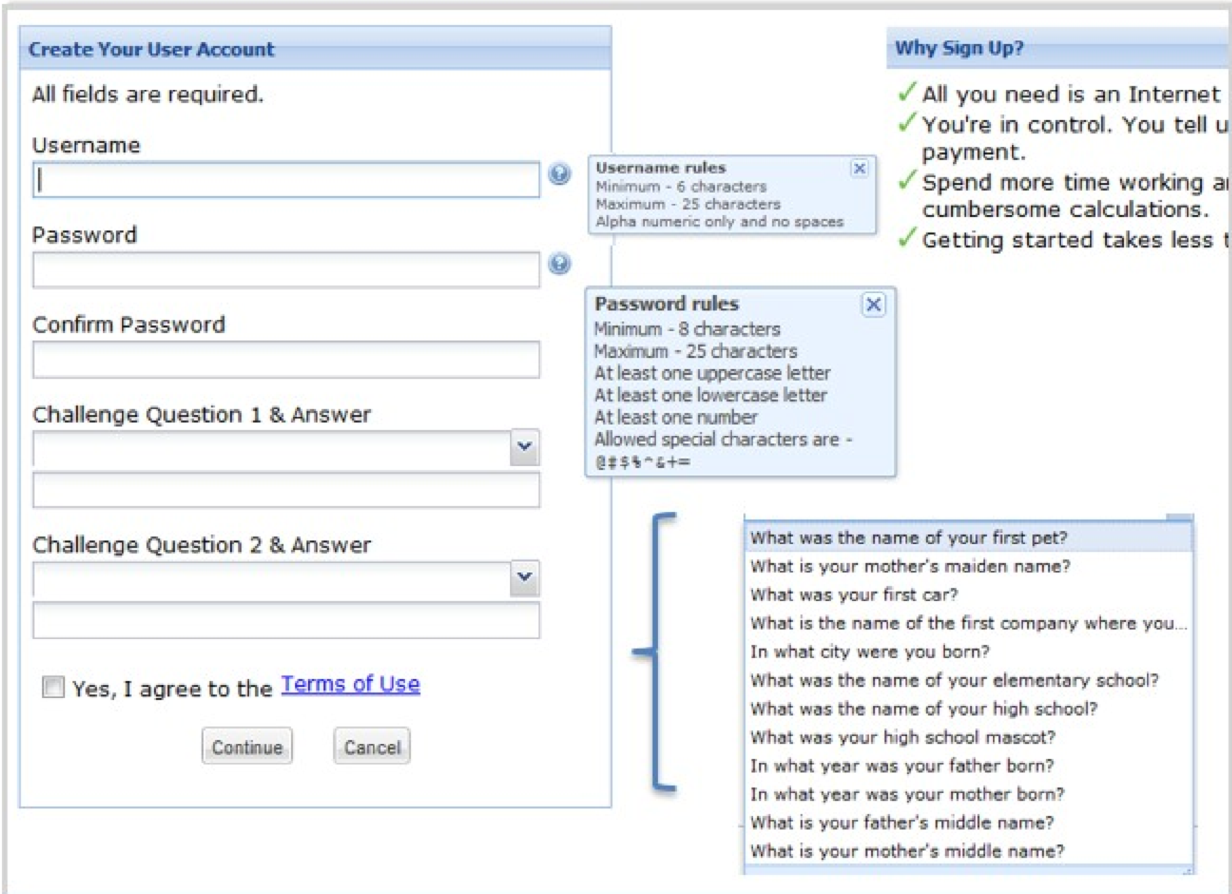
1. Go to the EmployerXG website. This page supplies information about what you can do on the site.
2. Notice the Sign In area on the right-hand side. Click **`Sign Up`** in the bottom of the Sign In area to go to the Sign Up page to enter information and authenticate who you are.



   a Enter your `Federal ID` number (with no dash).
   b Enter your `First Name` and `Last Name` as it is shown on your invitation.
   c Enter the `Invitation Code`.

   > **Hint:** The code is case-sensitive. Copy and paste this code from the invitation email to make it easier.

3. Click **`Continue`**.



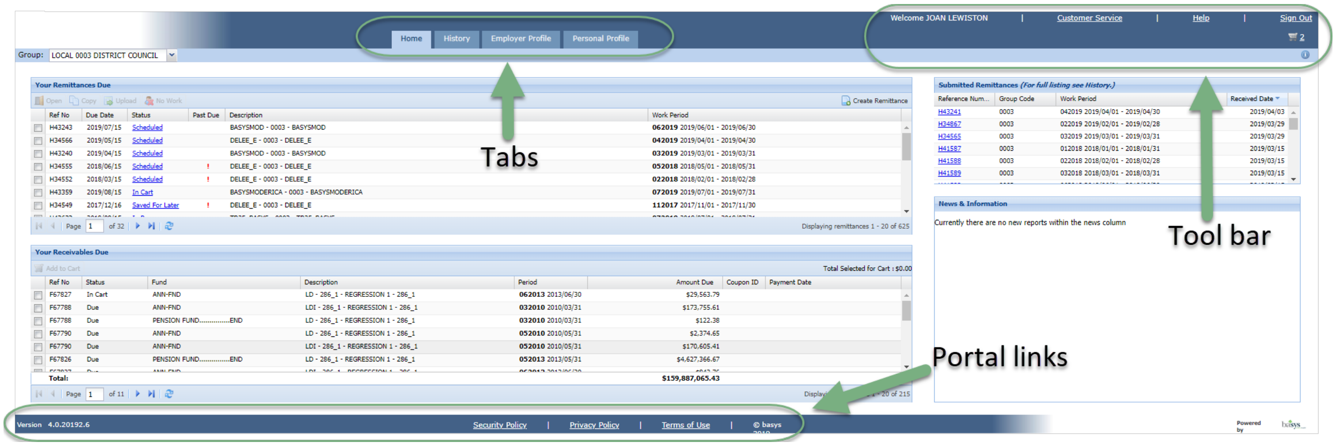
4. Enter your username and password. You'll need to use these each time you log in.

> **Hint:** Hover over the ? to show the ID and password rules.

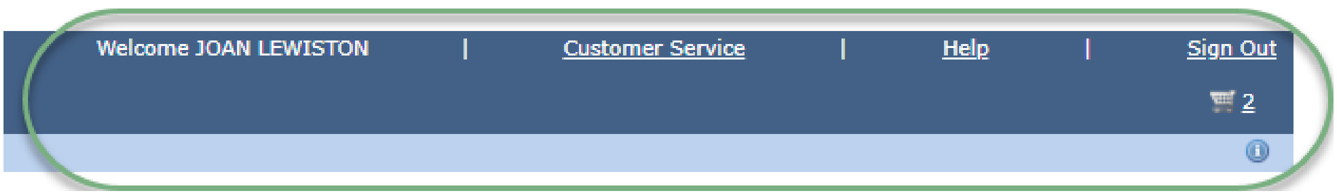
5. Select challenge questions and enter answers. You will need to answer these personal questions whenever editing your account to verify your identity.
6. View the `Terms of Use` and click the **`Yes, I agree to the Terms of Use`** check box.
7. Click **`Continue`** to create your account. Contact your administrator if you have trouble signing up.

Navigation

Before you begin using the employer portal, become familiar with navigating the tabs and links to quickly find information.



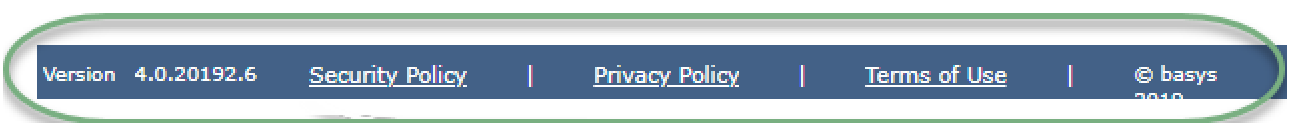
Tool bar



This tool bar is always available for you in the ribbon of any EmployerXG page. Click **`Customer Service`** and search the frequently asked questions category if you have questions about the portal. For remittance questions and to learn more about using the EmployerXG features, click **`Help`** to access the Remittance Quick Guide.

Click 🛒 to access the payment cart page. Hover over the ⓘ below the ribbon to view your current group's address.

Links



The portal's version number and copyright are always shown in the bottom of any portal page. You can also view the portal's security, privacy, and usage policies here byclicking the links.

Tabs

Click the tabs to switch between the Home, History, Employer Profile, and Personal Profile pages.

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

Home

The Home page is your hub for viewing and processing remittances. View your due remittances, due receivables (if configured), and a snapshot of your submitted remittances.

You can perform the following actions from Home page:

- Open a remittance
- Copy an existing remittance
- Create a new remittance
- Upload and pay a remittance

Note: Refer to the EmployerXG Quick Remittance guide for more information on the actions listed above.

History

View and print past summaries and details for processed remittances .

From the History page, you can:

- View and print a receipt of a selected historical remittance
- View details on fund(s) associated with a remittance selected from the Remittance Summary
- Amend a historical remittance
- Access listing of employees associated with a remittance
- Discover which user submitted a remittance

Employer Profile

Update employer contact information and bank information.

Note: You must be an administrator to view this tab.

From the `Employer Profile` tab, you can:

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

Personal Profile

Manage your own contact information and security information from the Personal Profile.

From the `Personal Profile` tab, you can:

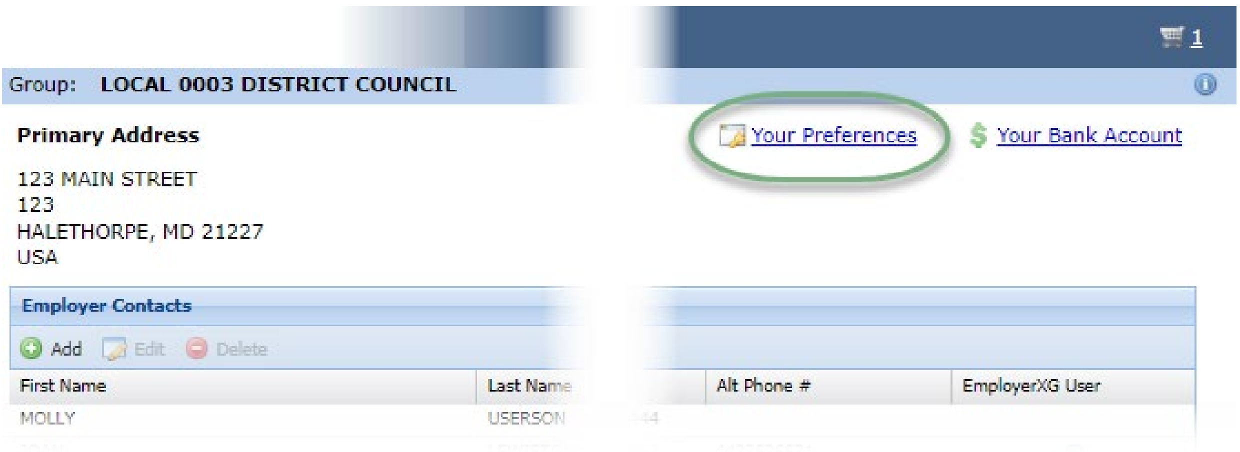
- Add or update your personal contact information
- Change your password and security questions/answers

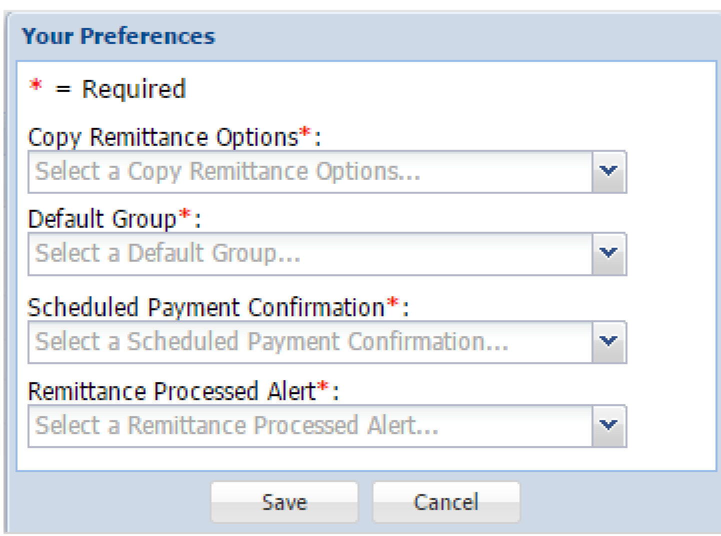
Set your preferences

Set default settings to improve your overall workflow.

1. Click the Employer Profile tab to access employer preferences.

2. From the `Employer Profile` page, click Your Preferences .





3. Set preferences for each option.
   - Choose what displays on the menu when you copy a remittance from the `Copy Remittance Options` list.
   - Depending on the selected `Copy Remittance Options` and if the associated remittances contracts match, the ID, Name, and Quantities,

or just the ID and Name are copied.

  - If the contracts associated with the remittance don't match, only the ID and Name are copied.

- Select the remittance group to display from the `Default Group` list.
- Select who receives payment confirmation and payment or posting failure emails from the `Scheduled Payment Confirmation` list. You can choose from `Primary Contact`, `Employer Administrators`, or `All Portal Users`.
- Choose the user category to send alerts from the `Remittance Processed Alert` list.

4. Click **`Save`** to update the portal.

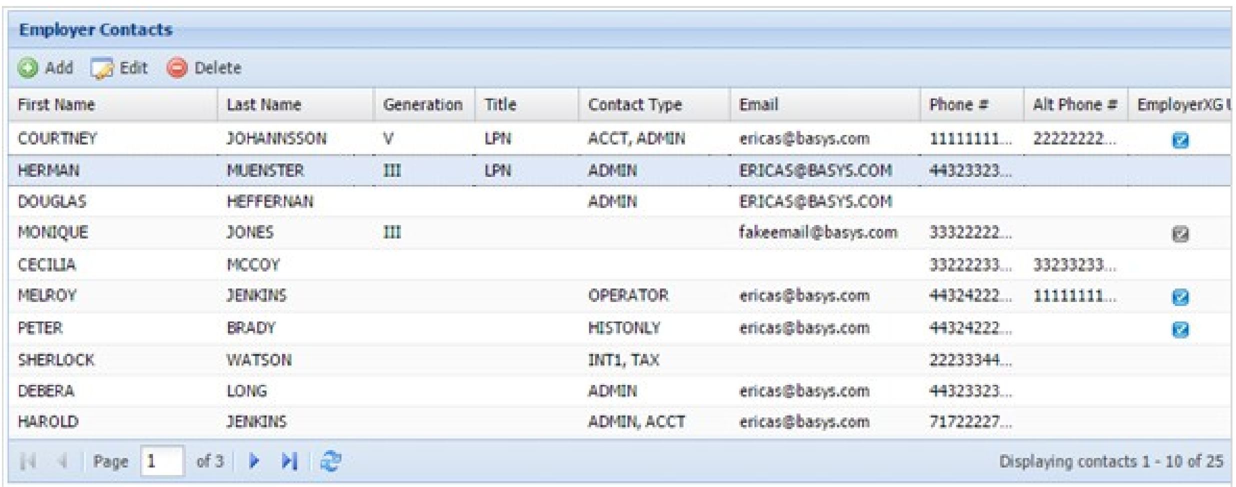
Add, edit, or delete portal contact

Manage the important employer contacts, such as administrators and accountants.

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. Click the **`Employer Profile`** tab.



Employer Contacts

Add Edit Delete

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	EmployerXG U
COURTNEY	JOHANNSSON	V	LPN	ACCT, ADMIN	ericas@basys.com	11111111...	22222222...	
HERMAN	MUENSTER	III	LPN	ADMIN	ERICAS@BASYS.COM	44323323...		
DOUGLAS	HEFFERNAN			ADMIN	ERICAS@BASYS.COM			
MONIQUE	JONES	III			fakeemail@basys.com	33322222...		
CECILIA	MCCOY					33222233...	33233233...	
MELROY	JENKINS			OPERATOR	ericas@basys.com	44324222...	11111111...	
PETER	BRADY			HISTONLY	ericas@basys.com	44324222...		
SHERLOCK	WATSON			INT1, TAX		22233344...		
DEBERA	LONG			ADMIN	ericas@basys.com	44323323...		
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...		

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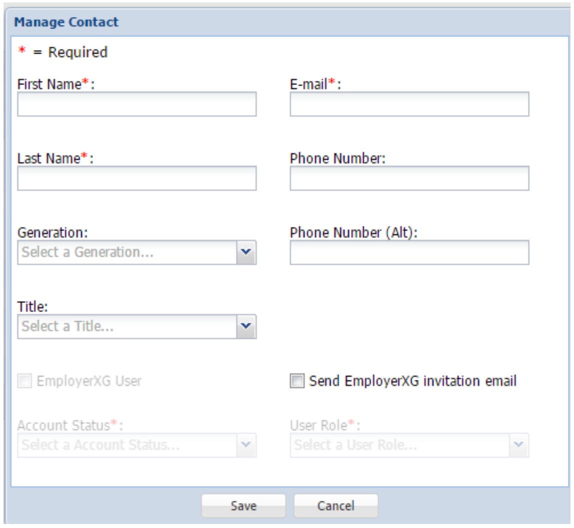
2. Click Add. The `Manage Contacts` window displays.



3. At a minimum, enter information into the required fields: `First Name`, `Last Name`, and `E-mail`. We also recommend entering each contact's `User Role`.

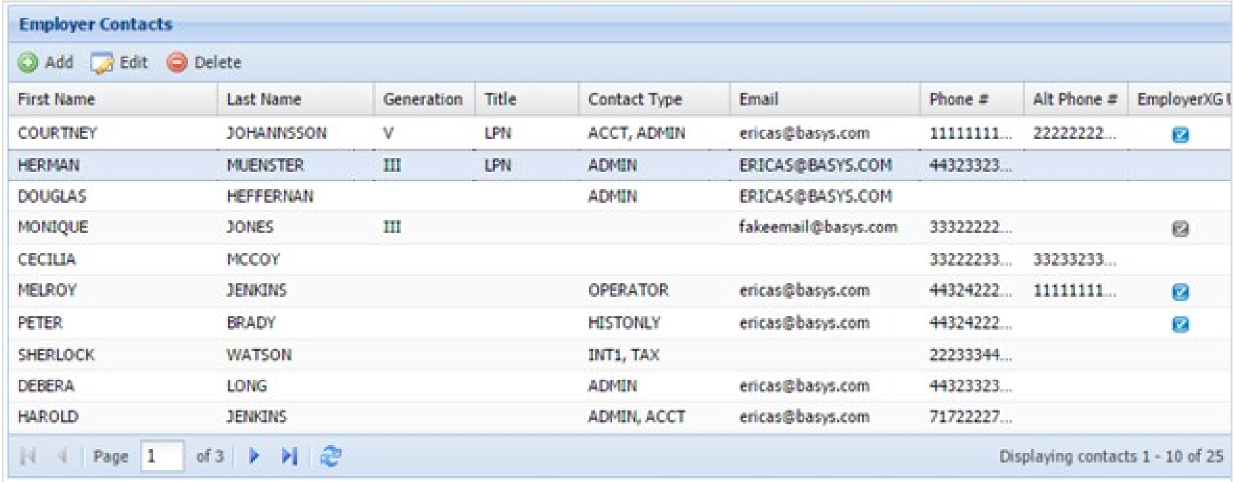
> **Important!** If you select `Send EmployerXG invitation email`, when you save the contact information, the contact is sent an email containing the instructions to begin the sign-up process. Notify the contact to watch for this email since the link expires after 24 hours. If they don't use the link before it expires, you will have to send another email.

4. Click **`Save`**.

Edit 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 change the account status.

1. Click the **`Employer Profile`** tab.



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CECILIA	MCCOY					33222233...	33233233...	
MELROY	JENKINS			OPERATOR	ericas@basys.com	44324222...	11111111...	
PETER	BRADY			HISTONLY	ericas@basys.com	44324222...		
SHERLOCK	WATSON			INT1, TAX		22233344...		
DEBERA	LONG			ADMIN	ericas@basys.com	44323323...		
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...		

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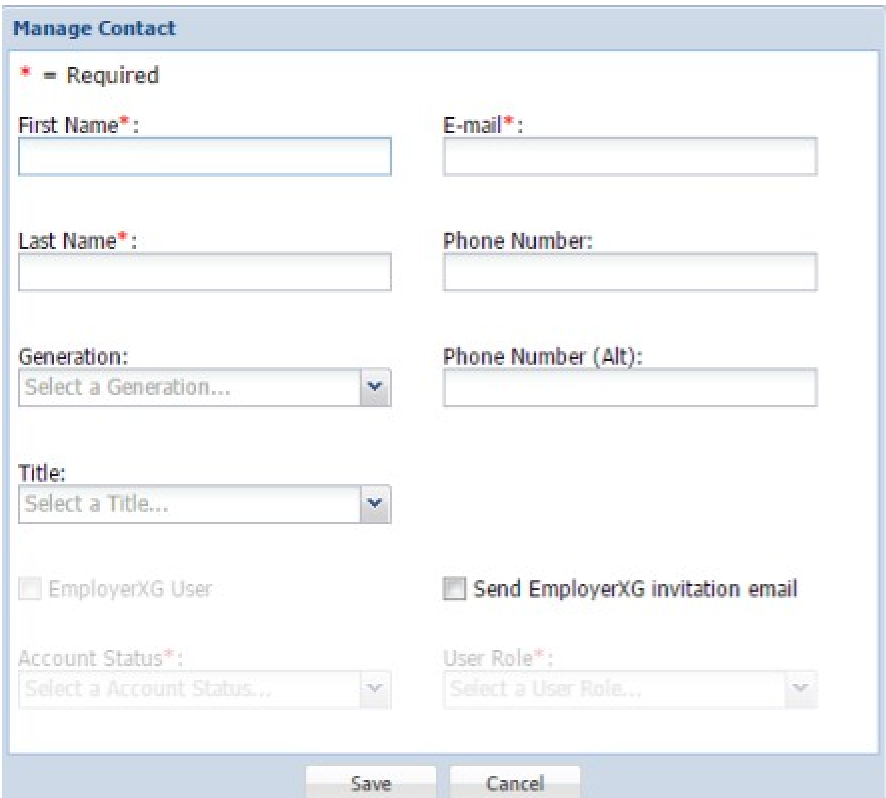
2 Click the employer contact to edit. Click Edit.



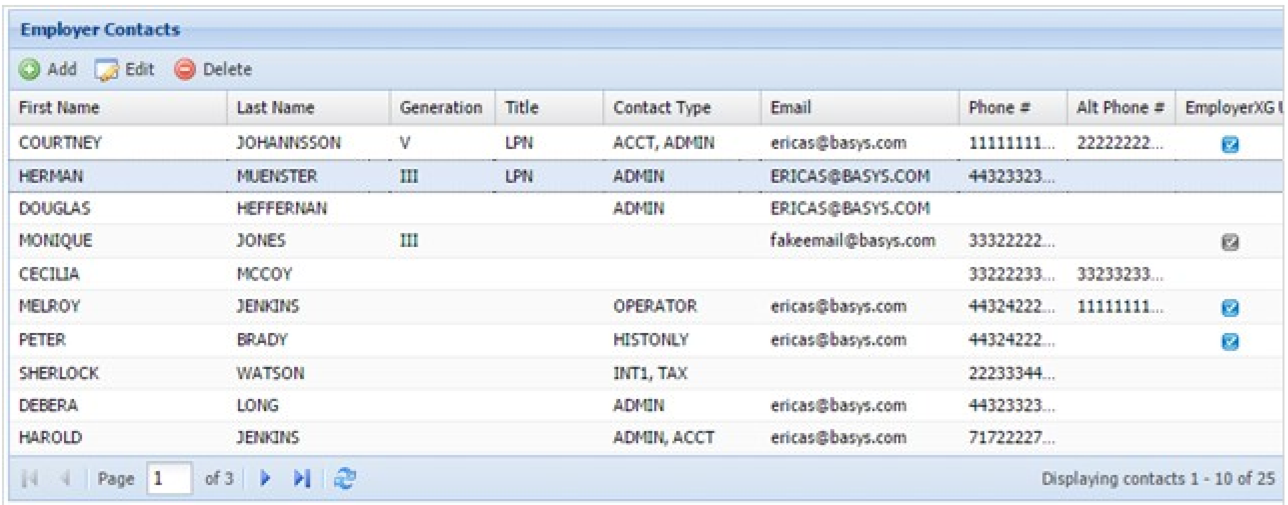
3 Change the contact information as necessary and click `Save`.

4 When the Manage Contact confirmation message displays, 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.



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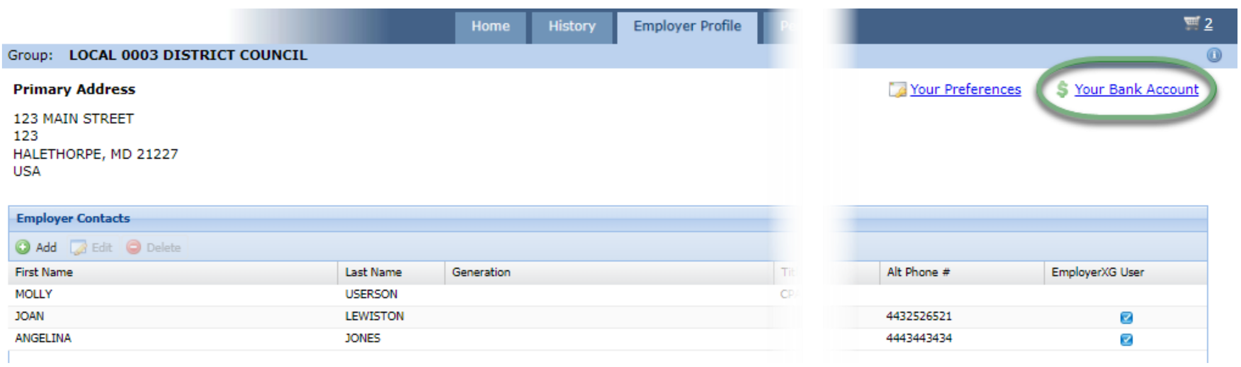
2. Click the contact to delete.
3. Click Delete.
4. Click **`Yes`** on the message.
5. Click **`OK`** in the deletion confirmation message.

Update bank account information

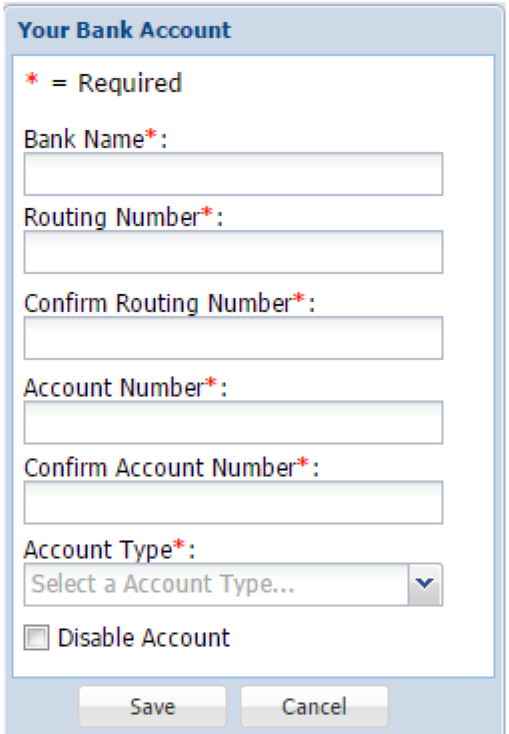
Update an employer's bank account information in the event of an account number or bank change.

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

1. Click the **`Employer Profile`** tab.



2. Click $ Your Bank Account at the top right of the page.



3 Add or update the appropriate required information.

- Enter the bank name.
- Enter and confirm the account's routing number.
- Enter and confirm the account number.
- Select the account type (checking or saving).
- Disable the account if the account is no longer your primary account.

4 Click **Save**.

5 Click **OK** on the message.