



## 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.

Topics in the guide:

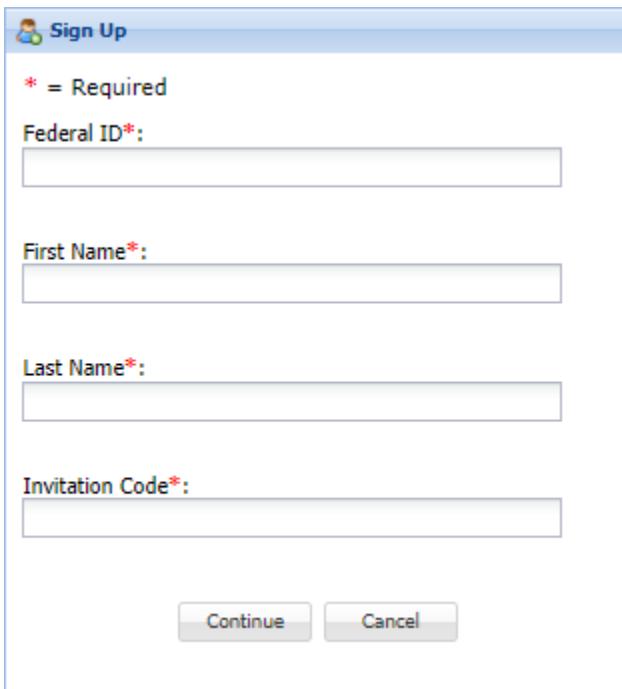
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# Sign up

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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.



The screenshot shows a 'Sign Up' form with the following fields:

- Federal ID\*:** An input field for entering a Federal ID number.
- First Name\*:** An input field for entering the first name.
- Last Name\*:** An input field for entering the last name.
- Invitation Code\*:** An input field for entering an invitation code.

At the bottom of the form are two buttons: **Continue** and **Cancel**.

- 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**.

**Create Your User Account**

All fields are required.

<p><b>Username</b></p> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text"/>		<b>Username rules</b> Minimum - 6 characters Maximum - 25 characters Alpha numeric only and no spaces
<p><b>Password</b></p> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="password"/>		<b>Password rules</b> Minimum - 8 characters Maximum - 25 characters At least one uppercase letter At least one lowercase letter At least one number Allowed special characters are - @#\$%^&+=-
<p><b>Confirm Password</b></p> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="password"/>		
<p><b>Challenge Question 1 &amp; Answer</b></p> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text"/>  <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text"/> </div>		
<p><b>Challenge Question 2 &amp; Answer</b></p> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text"/>  <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text"/> </div>		
<p><input type="checkbox"/> Yes, I agree to the <a href="#">Terms of Use</a></p>		
<input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; background-color: #f9f9f9; font-weight: bold;" type="button" value="Continue"/>	<input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; background-color: #f9f9f9; font-weight: bold;" type="button" value="Cancel"/>	

**Why Sign Up?**

- All you need is an Internet connection.
- You're in control. You tell us what you want to calculate.
- Spend more time working and less time on cumbersome calculations.
- Getting started takes less than a minute.

What was the name of your first pet?

What is your mother's maiden name?

What was your first car?

What is the name of the first company where you worked?

In what city were you born?

What was the name of your elementary school?

What was the name of your high school?

What was your high school mascot?

In what year was your father born?

In what year was your mother born?

What is your father's middle name?

What is your mother's middle name?

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.

The screenshot shows the EmployerXG portal interface. At the top, there is a navigation bar with tabs: Home, History, Employer Profile, and Personal Profile. To the right of the tabs is a user welcome message and a sign out link. Below the navigation bar is a green arrow pointing upwards, labeled 'Tabs'. The main content area contains two tables: 'Your Remittances Due' and 'Submitted Remittances'. The 'Your Remittances Due' table lists various remittance entries with columns for Ref No, Due Date, Status, and Description. The 'Submitted Remittances' table lists submitted remittances with columns for Reference Num., Group Code, Work Period, and Received Date. To the right of these tables is a green arrow pointing upwards, labeled 'Tool bar'. Below the tables is a section titled 'Portal links' with a message: 'Currently there are no new reports within the news column'. At the bottom of the page is a green arrow pointing upwards, labeled 'Portal links'. The bottom of the page also features a footer with links to Security Policy, Privacy Policy, Terms of Use, and a copyright notice for basys 2019.

## Tool bar

The screenshot shows the EmployerXG portal interface with a focus on the tool bar. The tool bar is a horizontal bar at the top of the page, featuring a blue header with the text 'Welcome JOAN LEWISTON' and several navigation links: 'Customer Service', 'Help', and 'Sign Out'. To the right of these links is a shopping cart icon with the number '2' and a help icon. A green arrow points upwards from the bottom of the page towards the tool bar, indicating its location.

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.

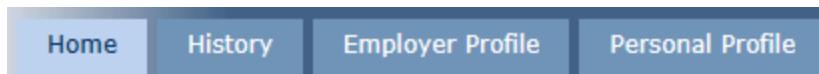
Click to access the payment cart page. Hover over the below the ribbon to view your current group's address.

## Links

The screenshot shows the EmployerXG portal interface with a focus on the links at the bottom of the page. A green oval highlights the footer area, which includes the text 'Version 4.0.20192.6', links to 'Security Policy', 'Privacy Policy', 'Terms of Use', and a copyright notice for 'basys 2019'.

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 by clicking 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.

The screenshot shows the 'Employer Profile' tab selected in a navigation bar. Below it is a table titled 'Employer Contacts' with columns for First Name, Last Name, Generation, Title, Contact Type, Email, Phone #, Alt Phone #, and EmployerXG. The table contains 10 rows of data. At the bottom of the table, there are navigation buttons for first, previous, next, last, and search, along with a page number indicator 'Page 1 of 3'. A message 'Displaying contacts 1 - 10 of 25' is also visible.

Employer Contacts								
Add		Edit		Delete				
First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	EmployerXG
COURTNEY	JOHANSSON	V	LPN	ACCT, ADMIN	ericas@basys.com	11111111...	22222222...	<input checked="" type="checkbox"/>
HERMAN	MUENSTER	III	LPN	ADMIN	ERICAS@BASYS.COM	44323323...		
DOUGLAS	HEFFERNAN			ADMIN	ERICAS@BASYS.COM			
MONIQUE	JONES	III			fakeemail@basys.com	33322222...		<input checked="" type="checkbox"/>
CECILIA	MCCOY					33222233...	33233233...	
MELROY	JENKINS			OPERATOR	ericas@basys.com	44324222...	11111111...	<input checked="" type="checkbox"/>
PETER	BRADY			HISTONLY	ericas@basys.com	44324222...		<input checked="" type="checkbox"/>
SHERLOCK	WATSON			INT1, TAX		22233344...		
DEBERA	LONG			ADMIN	ericas@basys.com	44323323...		
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...		

- 2 Click **Add**. The Manage Contacts window displays.

**Manage Contact**

\* = Required

First Name*:	E-mail*:
Last Name*:	Phone Number:
Generation:	Phone Number (Alt):
Title:	
<input type="checkbox"/> EmployerXG User	<input type="checkbox"/> Send EmployerXG invitation email
Account Status*:	User Role*:

**Save** **Cancel**

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.



Employer Contacts									
First Name		Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	EmployerXG I
COURTNEY	JOHANSSON	V	LPN	ACCT, ADMIN	ericas@basys.com	11111111...	22222222...		<input checked="" type="checkbox"/>
HERMAN	MUENSTER	III	LPN	ADMIN	ERICAS@BASYS.COM	44323323...			
DOUGLAS	HEFFERNAN			ADMIN	ERICAS@BASYS.COM				
MONIQUE	JONES	III			fakeemail@basys.com	33322222...			<input checked="" type="checkbox"/>
CECILIA	MCCOY					33222233...	33233233...		
MELROY	JENKINS			OPERATOR	ericas@basys.com	44324222...	11111111...		<input checked="" type="checkbox"/>
PETER	BRADY			HISTONLY	ericas@basys.com	44324222...			<input checked="" type="checkbox"/>
SHERLOCK	WATSON			INT1, TAX		22233344...			
DEBERA	LONG			ADMIN	ericas@basys.com	44323323...			
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...			

2 Click the employer contact to edit. Click  [Edit](#).

**Manage Contact**

\* = Required

First Name*:	E-mail*:
<input type="text"/>	<input type="text"/>
Last Name*:	Phone Number:
<input type="text"/>	<input type="text"/>
Generation:	Phone Number (Alt):
<input type="button" value="Select a Generation..."/>	<input type="text"/>
Title:	
<input type="button" value="Select a Title..."/>	
<input type="checkbox"/> EmployerXG User	<input type="checkbox"/> Send EmployerXG invitation email
Account Status*:	User Role*:
<input type="button" value="Select a Account Status..."/>	<input type="button" value="Select a User Role..."/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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.

Employer Contacts								
First Name		Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #
COURTNEY		JOHANSSON	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...	

- 2 Click the contact to delete.
- 3 Click .
- 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 bankchange.



**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.

The screenshot shows the 'Employer Profile' tab selected in a blue header bar. Below the header, the 'Group' is listed as 'LOCAL 0003 DISTRICT COUNCIL'. The 'Primary Address' section shows '123 MAIN STREET', '123', 'HALETHORPE, MD 21227', and 'USA'. The 'Employer Contacts' section lists four contacts: 'MOLLY' (Last Name 'USERSON'), 'JOAN' (Last Name 'LEWISTON'), and 'ANGELINA' (Last Name 'JONES'). On the right side of the page, there is a sidebar with links for 'Your Preferences' and 'Your Bank Account'. The 'Your Bank Account' link is highlighted with a green oval.

- 2 Click [\\$ Your Bank Account](#) at the top right of the page.

**Your Bank Account**

\* = Required

Bank Name\*:

Routing Number\*:

Confirm Routing Number\*:

Account Number\*:

Confirm Account Number\*:

Account Type\*:

Disable Account

- 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.