www.32bjfundsemployer.org

2018

Employer Self Service (ESS) Quick Guide

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Welcome

The purpose of this informational tool is to provide quick and useful information on the usage of the Employer Self Service (ESS) system.

Important Reminders:
Every time you log into ESS remember to check the **News** tab for general messages and reminders from 32BJ. Also, check the **Alert** section which contains messages from 32BJ that are specific to your user name and triggered by the conditions of your accounts.

Your registered email address is the Funds' primary means of communication regarding important changes to your account. **It's imperative to keep the email address current**.

Visit the 32BJ website at the following link for additional materials and answers to frequently asked questions: www.32bjfundsemployer.org

If you have any questions regarding your access to the ESS, contact your company's Security Administrator or your Funds Representative.

Accessing the Employer Self Service (ESS) Portal

- To log into ESS go to the 32BJ website: www.32bjremittance.com
- Enter your user name and password in the appropriate fields.
- Click **Log In**. User name and passwords are case sensitive.

You will have three attempts to successfully log in before you are locked out of the ESS system. In the event that you are locked, another security administrator can unlock you or an Employer Services Representative.

First Time Log In

- After you log in, the system will prompt you to reset your password. Type old password in the **Old Password** field. Type new password in the **New Password** and **Confirm New Password** fields. Click **Save** to update password settings.
- You will also be prompted to update your security question. Select a **First Question** from the drop down menu. Type the answer to the security question in the **Answer to First Question** field. Click **Save** to update security question settings after all changes are completed. A message displays advising that "You have successfully updated your security questions".
- **Account Settings** automatically displays next. You will see four options:
    - Reset Password
    - Update Security Questions
    - Update Email Address
    - Update Document Communication Preferences
- You can now click on the **Home** button to go to the main page.
- If the user name is linked to more than one employer select the Employer you wish to view. Choose the appropriate employer and click Select. If the user name is linked to only one employer the ESS Home page automatically displays.

Home

There are six sections to the home page.

- **Account Settings:** At the top right, last login date displays as well as two links:
    - **Logout**: Closes your current ESS session.
    - **Account**: Link used to maintain/update account settings.
- **Shortcut Menu: P**rovides quick access to common tabs.
- **Navigation Menu:** Tabs that appear in this section depend on the security access level of each user. These tabs provide access to different tasks and information in the system.
- **News:** This section displays general messages and reminders from 32BJ.
- **Alerts**: Contains messages from 32BJ that are specific to your user name and triggered by the conditions of your accounts.

- **Employer Account Summary**: Displays a list of accounts you have access to. Clicking the Transactions link opens the Transactions tab and clicking the Profile link opens the Accounts tab.

In addition to News and Alerts, we notify employers about delinquency invoices according to the following criteria:

Criteria Basis. 4 Notices (1 Letter format, 3 Email formats.)

- **5 Day Reminder Notice** – ***Email*** sent to Employer 5 days before our due date on 20th of current invoice as a reminder that pending invoice for the month are due.
- **5 Day Late Payment Notice (BCI)** – ***Email*** sent to Employer when they have any open BCI invoice with a balance due pending payment that's late from 5 to 35 days. (Example: Today is 10/23/2017 and due date for current invoice is 10/20/2017 but employer still has invoice pending due on 9/20/2017. Invoice due on 9/20/2017 will be 33 days late from today, therefore an email will be generated to Employer as a reminder that payment is due.)
- **5 Day Late Payment Notice (401K)** – ***Email*** sent to Employer when they have any RELEASED 401K invoice with balance due pending payment that's late from 5 to 35 days. (Since 401K invoices are weekly, this notice serves as reminder to employer as they might have forgotten to make payment for the 401K transactions.)
- **Late Payment Letter -** If employer ignores all of our email and continues to keep the transactions unpaid and discrepant, a batch will generate a late payment letter for any transactions that are over 35 days late. Depending when batch is processed, letter will include invoices that are currently due.

Roster

In this section you will be able to see your employee rosters which include the Participant ID number, last four digits of SSN, name, status, hire date, termination date, termination reason, job type, job class, current hourly wage rate, account number, account name, work location number, work location name, pension experience date and profit sharing experience date.

Processing a New Hire:

Select the **Execute Grid Action** to process a new hire (can also be performed from the Shortcuts Menu):

- Enter the employees SSN and click **Next**. A message displays, "No participants found, please try again."
- Click the **Here** link to create a new participant record. Enter the SSN of the new employee and click **Next.**

- Enter the Members Information and click **Next** (First name, last name, gender and date of birth are mandatory fields).
- Enter Primary Residence, Contact Information and click **Next**.
- Enter Roster Information which includes Account in which the member is hired in, select the Job Type, enter the Date of Hire, select the Job Class, enter the Hourly Wage Rate and click **Finish.**

Viewing Member Details:

Click on the Details link to view employee **Roster Information**, **Member Demographics** and **EOY Wages.**

Modifying an Existing Roster Record:

Click on the Actions icon to perform the following:

- Job Change: Click on the **Actions** arrow and from the drop down menu. Select **Job Change.** Enter the new job information: start date (Use the 1st of the current month if the change is happening before the 20th. Any changes after the 20th you should use the 1st of the following month), job type, job class (you will only be able to view job classes that pertain to your contract) and hourly wage rate. To complete click **Save**.
- Terminate: Click on the **Actions** arrow and from the drop down menu. Select **Terminate.** Enter the termination date and reason. To complete click **Save**.
- Transfer: Click on the **Actions** arrow and from the drop down menu. Select **Transfer.** Click on the drop down option and select the account in which the member is being transferred to. Enter the effective date, job type and job class. To complete click **Save**.
- New Leave/End Leave: Click on the **Actions** arrow and from the drop down menu select **New Leave/End Leave.** Click on the drop down option and select the Leave Reason (The available leave reasons are: Short Term Disability, Leave of Absence, Brigade, Military Leave, Workers Comp, Seasonal Leave, Leave with Health and Family Medical Leave). Enter the Leave Start and Stop date. To complete click **Save**.
- New Wage Rate: **New Wage Rate.** Enter New Wage Rate Start and Stop Date (stop date is not mandatory). Enter the New Wage Rate and to complete click **Save**.
- Modify Wage Rate: Click on the **Actions** arrow and from the drop down menu select **Modify Wage Rate.** Enter the Wage Rate Start Date, Stop Date and new Wage Rate (Stop date is not mandatory). To complete click **Save**.
- Modify/Delete Leave: Click on the **Actions** arrow and from the drop down menu. Select **Modify/Delete Leave.** To delete a leave check the box next to the word Delete. You have the option to modify the Leave Reason, Start Date and Stop Date. To complete click **Save**.

Invoices:

In this section you will be able to see a list of invoices that are in a 'Pending' status. It means that the invoices have not been submitted to the fund office and they are available for editing. The different invoice types you will see are: Originals, Adjustments and Rebill invoices. You can also delete, release and create both Original and Adjustment invoices.

Benefit Contribution Invoice (BCI): A monthly in arrears bill for employer benefit fund contributions (Health, Pension, Training, Legal, and Profit Sharing) negotiated in your collective bargaining or participation agreement. BCI Invoices are due on the 20th of the following month. The invoice details are calculated based on your roster and other rules defined in your agreement or plan. In a limited set of agreements, the employer must report contributable hours or specific dollar amounts.

401k: If your company participates in the Supplemental Retirement Saving Plan and you have employees that elected to defer wages for 401k then, the Employer is responsible to create and submit those invoices in ESS. 401k invoices are created weekly or biweekly depending on your payroll cycle. All 401k invoices are due 7 days after the payroll pay date.

Union Dues and Initiation Fees (UDI): In accordance with the SEIU Local 32BJ Constitution and Bylaws, a condition of membership is the monthly payment of dues in an amount specified in the Constitution. The amount of members' dues obligation varies in accordance with their hourly wage, number of days of employment per week, and health benefit coverage. Most collective bargaining agreements include a provision that covered employees pay Union dues. The provision is referred to as a Union Security clause. Employees covered by a Union Security Clause may refrain from joining the Union and may make a monthly payment that is less than the dues rate that would apply if they were members of the Union. This reduced payment is known as an "agency fee payment." Employers are required to deduct dues or agency fee payments from workers who have signed a dues check off authorization form. In general Dues are due by the 20th of each month unless the language in the CBA states otherwise.

American Dream Fund (ADF): Otherwise known as the American Dream Fund. The SEIU 32BJ ADF is a federal political action committee (PAC) that is registered with the Federal Elections Commission (FEC). Workers who have signed the ADF Check off authorization form have elected to contribute voluntary contributions to Local 32BJ. The elected amounts are weekly based. The union's ADF invoices in ESS are calculated to bill based on that weekly amount based on the number of Sundays in a month.

Please note that if the amount billed does not match your deducted amount, the invoices can be edited in the ADF deducted column to reflect the amount you deducted for payment. In general ADF is due by the 20th of each month unless the language in your CBA states otherwise.

Creating Invoices:

- Click on the **Create Invoice** button.
- Select **Create Invoice Online**.
- Select the Account from the drop down menu (To create invoices for all accounts, leave the filter as ALL).
- From the drop down menu select the invoice type.
- Mark the checkbox for the invoice to create and enter the Report Period Start Date.
- Click on **Create Invoice**. Message appears advising "The Invoice(s) you selected have been submitted for creation".

Creating Adjustment Invoices:

- Click on the **Create Adjustment** button.
- Select the Account from the drop down menu (To create invoices for all accounts, leave the filter as ALL).
- From the drop down option, select which Invoice Type you want to create an adjustment for.
- Mark the checkbox for the row containing the Account(s) you want to create the adjustment(s) for.
- Modify the invoice start and stop date to reflect the reporting period for the adjustment you are creating. Adjustment dates should correspond with the original invoice.
- Click on the **Gen Adjustment** button to create the adjustment invoice. A message will appear advising "The adjustment you requested was successfully generated".
- Pending Adjustment should now be displayed under the invoices tab.

Editing BCI

- Click **Details** on the pending transaction. Here you can view the details and charges for each member.
- If you have hours or wages to report, click "**Edit**" and add all hours, contributable hours and wages to the open fields.
- Click "**Save**" and "**Close**". This will take you back to the invoice details screen. Click "**Back**" to go to the prior screen.
- After you reviewed and edited the invoice, mark the checkbox for the invoices you are ready to pay. Click "**Release**".

Editing 401k

- Click "**Details**" on the pending transaction. Here you can view the participant records for the selected 401k invoice.
- Click "**Edit**" and enter the 401k amounts for each participating member.
- On the top left hand corner, click on the "**Perform Grid Operation**" and select "**Invoice Summary**".
- On the pop up window, enter the Payroll Pay date. Click **Save** and **Close**.
- Now you will be taken back to the invoice details. Click **Save** on the 401k invoice and **Close**.
- After you reviewed and edited the invoice, mark the checkbox for the invoices you are ready to pay. Click "**Release**".

Editing UDI

- Click **"Details"** on the pending transaction. Here you can view the details and charges for each member.
- If the Invoice does not match what you are remitting. Click "**Edit"** and in the upper left corner click the "**Arrow on the Wheel"** and select "**Payroll Deductions".**
- Click "**Dash under Payroll Deduction**" and select "**Add All**". This will populate all the members on the invoice and you will input what you have deducted in the "**Withholding Amt"**. If no deductions you will input **$0.00**.
- After you reviewed and edited the invoice, you will click "**Save** and **Close".**
- Click "**Back**" to go to the prior screen.
- Mark the checkbox for the invoices you are ready to pay. Click "**Release**".

Editing ADF

- Click on Details on the pending transaction. Here you can view the details and charges for each member.
- If the amount does not match to your Deductions, Click "**ADF Deducted Column"** can be updated.
- Click "**Save**" and "**Close**". This will take you back to the invoice details screen.
- Click "**Back**" to go to the prior screen.
- After you reviewed and edited the invoice, mark the checkbox for the invoices you are ready to pay. Click "**Release**".

Please note that once an invoice is released you are agreeing with the charges on that specific transaction and changes to the invoice can no longer be made. You will now see your released invoices in the Payment Processing tab.

Payment Processing:

In this section you will be able to see a list of released invoices with an open balance that needs to be paid or allocated. You can also view the Transaction details and any prior monetary allocations. At this point no changes can be made to an invoice. If any discrepancies or issues are noticed after the invoice is ready for payment, please reach out to Employer Relations for assistance. The different invoice types you will see in this section are: Released Originals, Adjustments and Rebill invoices.

- To apply a payment/allocation to the invoice, select one or many invoices of the same invoice type and click the '**Make Payment**' button.
- If you wish to review the invoice details and prior monetary allocations for the invoice please click the '**View**' link in the action column.
- Mark the checkbox for the invoices you are ready to pay. Click "**Make Payment**".
- You will be taken to the complete payment section where you can review your list of invoices included in this payment. If correct, please select the '**Complete Payment**: **ACH**' button to initiate your secure payment process.
- You will be taken to the Chase Pay Connexion website where you will be able to complete your payment and receive your confirmation number.

After you have completed your payment successfully and have logged out of Chase Pay Connexion, you will be taken to the Transactions tab in ESS.

Transactions:

In this section you will be able to view all invoices (Pending, released and paid Originals, Adjustments, Rebills and interest). You can filter this page using a variety of parameters. You can also view the Allocation Details of an individual transaction and also Participant Details. If you wish to pay a Released Invoice you can also do so from this section.

Transaction Parameters:

- Balance: From the drop down menu you can choose from All Balances to 90 day balances.
- Transaction Type: From the drop down menu you can view Original, Adjustment, Rebill, Interest or all transaction types.
- Activity Date: From the drop down menu you can view invoices from All of Time to specific date ranges.
- Status: From the drop down menu you can select to view all, opened or closed transaction statuses.

Transaction Types:

- **Original** is the primary invoice which is either automatically or manually created in ESS.

- **Adjustment** is an additional invoice, secondary to the original, which can be created manually or be triggered automatically by a roster changes in ESS.
- **Rebill** is an additional invoice, secondary to the original, which is only triggered by changes in the contracted **Rules** and entered **Leaves**.
- **Interest** occurs if an Invoice is not paid by the due date. If an Invoice is in an "ACH Payment Bounced" status after the due date of the Invoice. If an Adjustment Invoice (created for an amount due to the Funds for retro-active reporting period) results in a net positive amount due to the Funds beyond the due date of the original Invoice Reporting Period.
- **Credits** can occur when a timely roster change is made after an Original invoice is paid.
- **Payment** can be found in V3. Each time a payment is made, ESS assigns a Transaction number to it. This number will allow you to view all Invoices paid under that transaction.

Opened Transactions:

When filtering for "Open" status invoices, you will see all pending Originals, Adjustments, Rebills, Interest and Credits.

- By clicking on the down action arrow on an Original, Adjustment and Rebill you can "**View allocation details**", "**Pay**" and "**View Participant Details**".
- When clicking on the down action arrow on an Interest charge, you can see "**View allocation details**" and "**Pay**".

Applying Credits:

- Click on the down action arrow on an open Credit transaction and select **Apply Credit**.
- Select the checkbox for the invoice **Debit Transaction** to apply the payment. You can select more than one debit transaction before clicking **Apply** as long as the Remaining Balance is enough to pay the full debit. If it is not, click **Apply** and then continue to apply the remaining credit as a partial payment.
- Click **Apply**. The paid amount of the Debit Transaction updates, and the Remaining Balance of the Credit Transaction updates.

Closed Transactions:

When filtering for "Closed" status invoices, you will see all paid Originals, Adjustments, Rebills, Interest and Credits.

- By clicking on the down action arrow on an Original, Adjustment and Rebill you can "**View allocation details**" and "**View Participant Details**".

- When clicking on the down action arrow on an Interest charge, you can see "**View allocation details**".
- When clicking on the down action arrow on a payment transaction, you can "**View allocation details**" to see which invoices the money was applied to.

Uploaded Files:

In this tab you can view all uploaded files by users in your organization. The upload file tab is used to import hours and wages for Employers with a large number of members and/or to report multiple contribution periods at once. The different upload files that can be processed are: BCI, 401k, Gross Wages EOY, UDI and ADF. Please be sure to visit our Employer website for file formatting templates (Employer File Import Specifications.)

How to upload a file:

- Select what **File Type** you want to upload.
- Click **Browse**. Locate and select the import file. The file and path will populate on **File** field.
- Enter the **File Description**.
- Do not enter the Employer ID. This will cause errors for those Managing Agents who are processing an import.
- Click **Upload** to initiate the upload. A status bar with an upload percentage displays while V3 checks the first-level validation requirements against the import file. A message displays that the file has successfully uploaded
- Click on the **Process** link for the file to start processing. Hit the **Refresh** button to update the page.
- Once the file is uploaded, the Process Status will say "Completed" or "Processed with Errors".
- If you file is processed successfully you can move onto the Invoices tab to review your Invoice.
- If the file was processed with errors, you must click on the **Details** link to see the Import Status Detail for each member. Each line on the import is assigned a sequence number. The Resubmit flag will be checked off for the member(s) that were processed with errors (Please ignore the checked box for the header as this is not a true error).
- Please click on the **View Errors** button to view the error details. A pop up will appear and you will be able to see the error messages for that specific sequence number. The most common error types are:
    - Participant ID or SSN must be provided in a proper format.
    - Participant ###### does not exist in V3.
    - Participant ###### was not active during reporting period.
    - Participant ###### is ineligible for 401K Contributions.

  - Participant ###### is not eligible to contribute for reporting period.
  - ORA-01843: not a valid month.
  - Reporting Period is off cycle (401k).
  - Participant with SSN ######### cannot be confidently matched to a Participant ID, specify the appropriate Participant ID and reprocess.
  - Participant ###### is active for multiple Accounts for different Employer ID's during the Reporting Period. Please select the appropriate Account ID and reprocess.
  - 401k Invoice cannot be generated for a future date.
  - Participant not found on Roster.

- After reviewing your errors, you can go back into the import details and correct the sequence number affected. Click **Save**. Hit the **Process** button and **Refresh**. Now you will see that the sequence number is processed successfully. You can now move onto the Invoices tab to review your Invoice.
- If you have a lot of errors, please correct the Import Template and Re-upload the file. The system will override the previous file that you uploaded for the same contribution period.

Employer Administration:

This page allows you to add, delete, and update contacts.

Creating a new ESS User under an Employer level:

- Click **Add** in the **Employer Contacts** section.
- To create a new user, please click on the **here** link.
- Complete the New User information. The User name is system generated.
- Select a Security Role from the drop down menu. Click **Submit**.

Creating a new ESS User under an Account level:

- Hit the drop down menu to select the account in which this User needs access to.
- Click **Add** in the **Account Contacts** section.
- To create a new user, please click on the **here** link.
- Complete the New User information. The User name is system generated.
- Select a Security Role from the drop down menu. Click **Submit**.

How to Edit a Contact under an Employer/Account level:

- Click **Edit** next to the Contact name to update.
- The **User Details** display. On the bottom left corner, click on the **Edit** button.
- Update the information and click **Save** to update the users' profile, or click **Back** to return to the main tab.

How to Delete a Contact under an Employer/Account level:

- Click **Delete** next to the Contact name to update.

- Message appears advising "You are about to delete this record. Are you sure? "Click **Ok** to continue.
- You will now see that the user is no longer listed as a contact and you will return to the main tab.

Accounts:

In this tab you can view the Account Information, Work Location Address and Contacts for the selected account. You can also add, edit, and delete contacts.

How to Add a contact:

- Click **Add Contact** on the bottom left corner of the page.
- Complete the **Contact Details**.
- Click **Save**.

How to Edit and Delete a Contact:

- Click **Edit** next to the Contact name to update.
- Contact Details displays.
- Update the information and click **Save** to update or click **Back** to return to the main tab.
- To delete a contact click **Delete** next to the Contact name.
- Message appears advising "You are about to delete this record. Are you sure? "Click **Ok** to continue.
- You will now see that the contact is no longer listed and you will be returned to the main tab.

Employer Information:

In this section you can view and edit Employer Demographics, Address and Contact Information. You can also add, edit and delete contacts, please refer to the Employer Administration section for the steps.

Demographics:

- Click **Edit.**
- Update Tax ID No. and/or Employer Name
- Click **Save**.

Edit Address:

- Click **Edit.**
- Update the Business Address and Contact details.
- Click **Save.**

Notify Us:

This tab allows employers to contact 32BJ office for notification about account changes.

The multiple reasons why you would use this tab is to notify us for: Employer Name Change, Gain of Work Location, Loss of Work Location, Newly Organized Building (NOB), and Sale of Building.

- Enter the **Effective Date of Change** (MM/DD/YYYY this field is mandatory)
- Select one of the following **Reasons** from the drop down field: Employer Name Change, Gain of Work Location, Loss of Work Location, Newly Organized Building (NOB), and Sale of Building (This is a mandatory field).
- Insert the **Work Location Code.** This must be Numeric and a max of 25 characters.
- Insert the **Work Location Name.** There can only be a max of 250 characters.
- Insert the **Account#.** This must be Numeric and a max of 25 characters.
- Insert the **Old/New Employer Named.** There can only be a max of 100 characters.
- Insert the **Comments.** There can only be a max of 245 characters.
- **Attach File** next. The file cannot be larger than 25 MB. The only type of Files accepted are Excel, Word and PDF. Employers should attach the Roster if they are gaining a work location or if they have a newly organized building. If additional attachments need to be added, for example Union Dues Cards, employers should send an email with the attachments to Employer Relations indicating the workflow number they received as the subject line.
- Click **Submit.** A message appears advising "Request sent successfully. Workflow # ####### created". (This workflow number will also appear on the Alerts section on the Home page).

As always, remember that when losing a work location, you must transfer any members that are staying with the company to their new account(s). Also, do not terminate employees when losing a work location, attach the roster file for members staying in that location/account and we will transfer them to the new employer.

Reports:

In this section of ESS you can access the reports module to run predefined reports in the ESS portal. The different reports that can be ran are: Employer ACA 1095C Detail Report, Invoice Details 32BJ Funds Report, Invoice Details 32BJ Union Report, Notify Us Workflow Report, Participant Roster Change Report and ESS Account Status Change Report. When running an invoice detail report, please keep in mind that it can only be ran for one contribution period at a time.

- Select the report you want to run from the drop down menu. The fields that display in the parameters section vary based on the report selected.
- Complete the fields in the parameters section.
- Click **Show Report**. The report displays in PDF format.
- Click **Export** to export the report in Excel format.

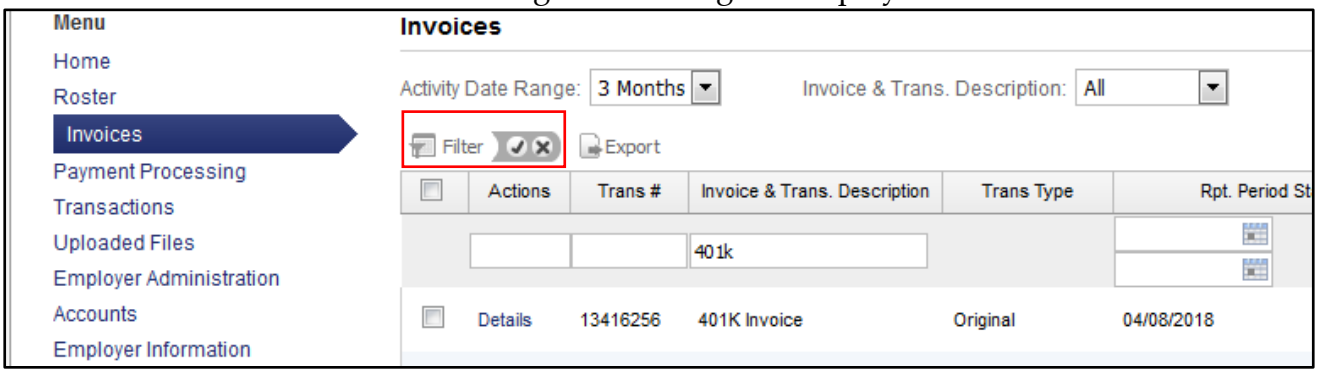
Helpful Tips:

In this section you will find some helpful tips that will assist you with navigating through the ESS system.

Filter:

This function allows you to narrow down your number of grids being displayed at once within that specific tab.

- Click the **Filter** icon above any grid. A new row at the top of the grid displays.
- Enter the key information to narrow down your search.
- Click **Execute**. The grid displays only rows matching the criteria you entered.
- Click **Clear Filter** to revert the grid to its original display and click **Execute**.



Records:

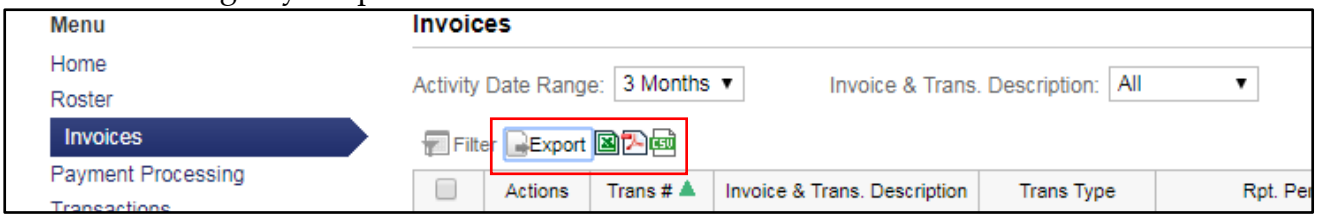
In ESS this functionality allows you to extend the number of rows being displayed at once. This will be helpful if you wanted to display a large number of records at once.

- Click the **Records** icon above any grid. A new field opens up to the right.
- Enter the number of records that you want to display at once.
- Click **Execute**. The grid displays all the rows up until the number of records you have specified.
- Click **Clear Filter** to reset the number of records.

Export:

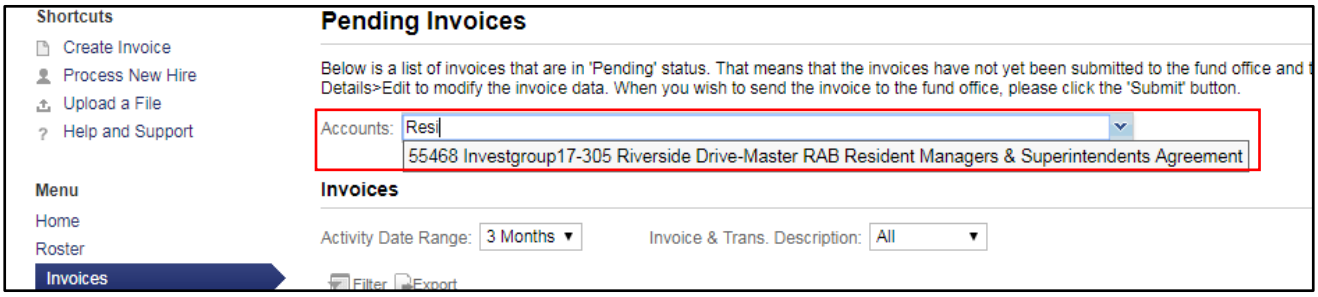
This function in ESS allows you to create a soft copy of the data being displayed in the system.

- Click the **Export** icon above any grid. Three options are displayed (Excel, PDF and CSV).
- Select the file type you want.
- A pop up appears where you will be able open the document and save it according to your preference.

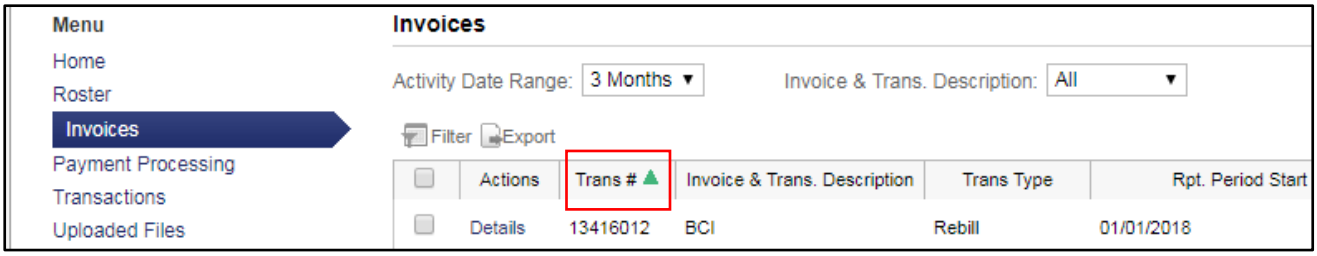


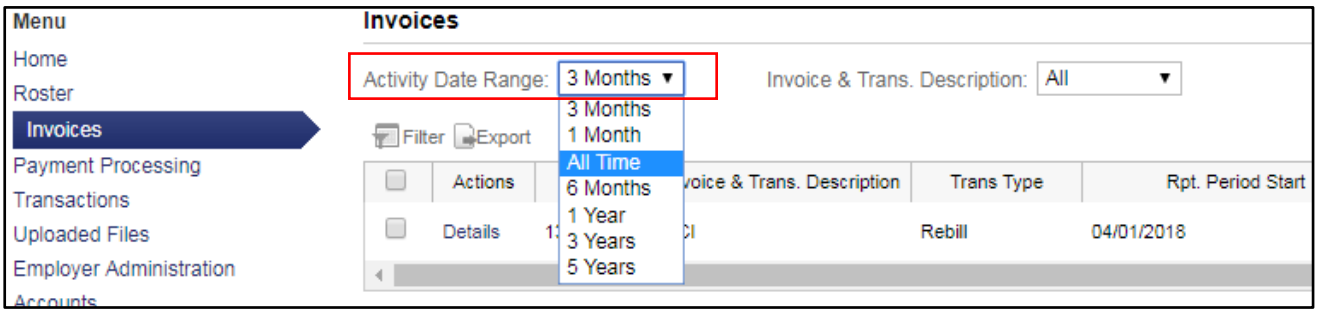
Sorting:

From the accounts drop down selection, you can start to narrow down your display by typing in any Account # or key codes to help you find a specific account.



On any one of the tabs you can select the header title to sort by either numerical or alphabetical order. The green arrow will display to show you that the column is sorted (Descending or Ascending).



Activity Date Range:

The Roster, Invoices, Payment Processing and Uploaded files tab has an Activity Date Range drop down menu. It is automatically defaulted to 3 months but can be extended to view all of time. This is to ensure that the ESS system is performing at its best.