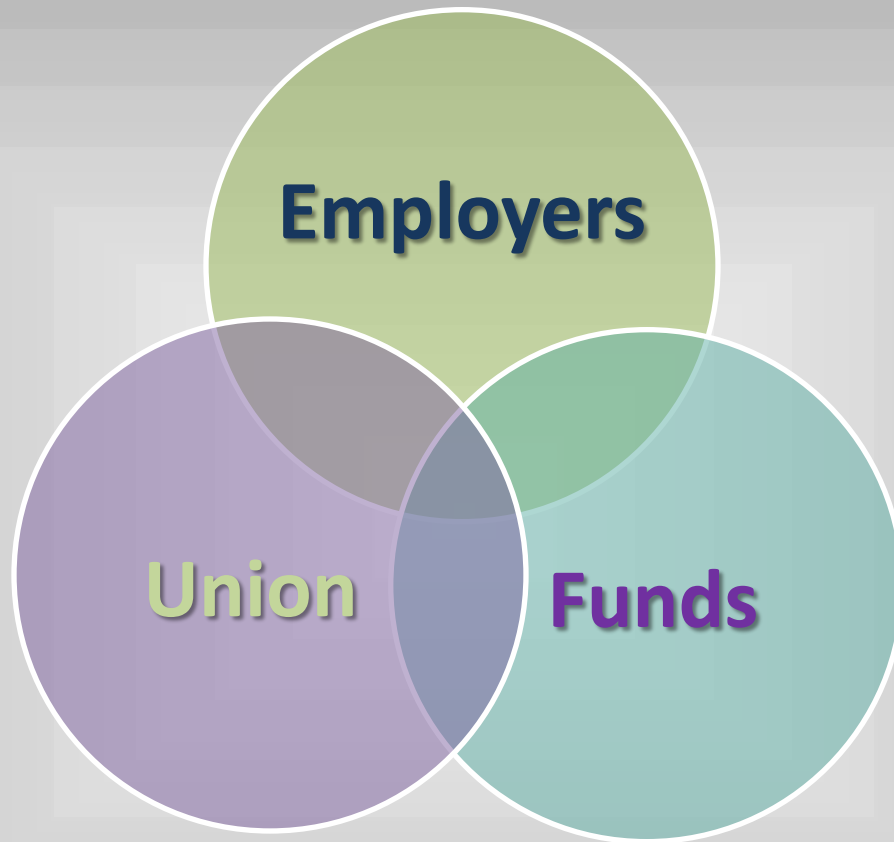


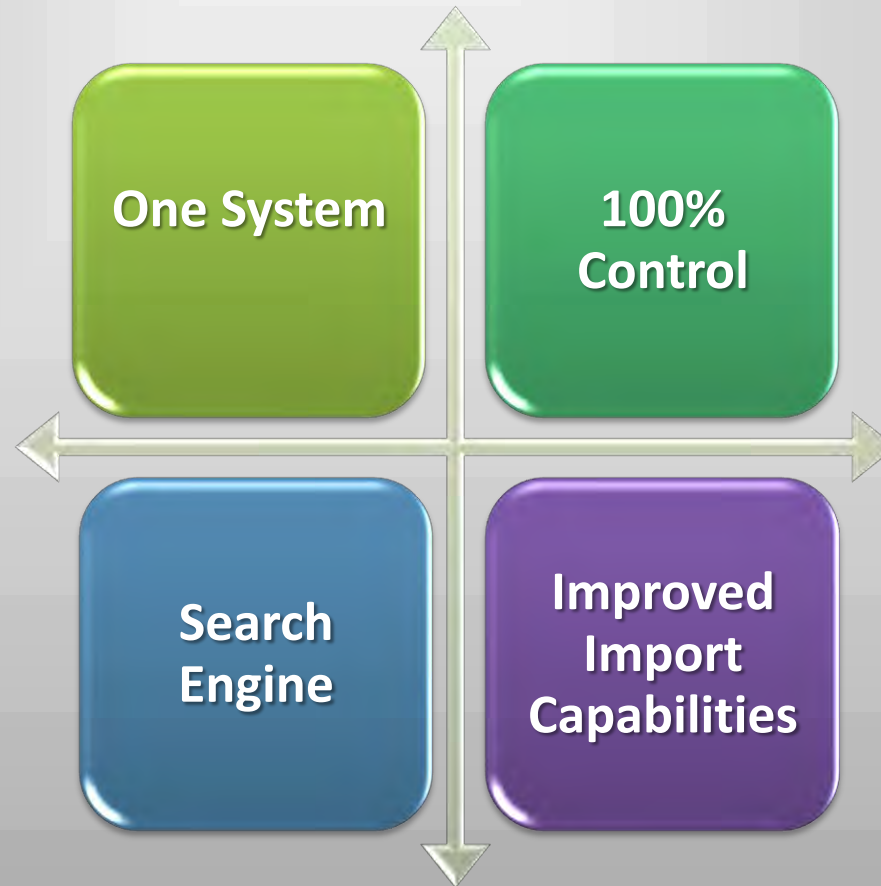


Employer Self-Service (ESS) Training Guide





Employer Self-Service Enhancements



Agenda



ESS Overview



Updating Demographic Data



Processing Roster Changes



Invoice Processing



Reports



Recap

ESS Overview

The Employer Self-Service (ESS) runs on any high speed Internet Connection.

However, it runs best on the latest version of Mozilla FireFox. Download browser: www.firefox.browser-download.com

ESS is used by Employers to:

- Report to
 - ✓ 32BJ Funds
 - ✓ SEIU Local 32BJ

- Update **Roster** information, add **New Hires**, create and pay **Invoices**, and upload **Invoice Files**.



ESS Overview

The ESS Homepage has 6 Sections

The screenshot shows the ESS homepage for user Sherry Davis. The page is divided into several sections, each highlighted with a red circle and a number:

- 1**: User information and navigation links at the top right, including "Last Logon 05/22/2013 | Account | Logout" and "Welcome Sherry Davis 05/22/2013".
- 2**: Shortcuts on the left side, including "Create Invoice", "Process New Hire", "Upload a File", and "Help and Support".
- 3**: The main navigation menu on the left, with "Home" highlighted.
- 4**: The "News" section, which is currently empty.
- 5**: The "Alerts" section, displaying a reminder: "April 15, 2013 Reminder: You have not released and paid BCIs for all of your accounts for the last March reporting period and they are due on April 20, 2013".
- 6**: The "Accounts" table at the bottom, with "Filter" and "Export" buttons above it.

25140 - Manhattan Realtors [Change Employer]

Home

News

Alerts

- April 15, 2013 Reminder: You have not released and paid BCIs for all of your accounts for the last March reporting period and they are due on April 20, 2013

Filter Export

Account Name	Work Location Name	Account Number	Balance	Actions
Manhattan Realtors-25 West 64th Street-Capel - Residential	25 West 64th Street	19519	\$0.00	Transactions Profile
Manhattan Realtors-1220 Park Avenue-Capel - Residential	1220 Park Avenue	19521	\$0.00	Transactions Profile
Manhattan Realtors-1276 Fulton Ave-Capel - Residential	1276 Fulton Ave	19522	\$0.00	Transactions Profile

Showing Records 1 - 3 of 3



ESS Overview

Account Settings



Last Logon 04/12/2013 [Account Logout](#)

25140 - Manhattan Realtors (Change Employer)

Welcome Sherry Davis 04/13/2013

Account Settings

You can update your password, email as well as a variety of other settings that affect your user account.

Reset Password

Please remember to frequently update your password.

Update Email Address

Your email address is our primary means of communicating with you. Please make sure that you keep it up to date.

Update Security Questions

Your security questions are used when you forget your password.

[Home](#)



ESS Overview

Roster

25140 - Manhattan Realtors [Change Employer]

Welcome Sherry Davis 05/22/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster**
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Roster

The information below represents your employee roster. You can use the filter options to view this across all accounts, or narrow it down to a specific account. Click on "Details" to view information about any 'On Leave' records and Wage Rates.

Account:



Filter Records Print Export

<input type="checkbox"/>	Details	ID #	SSN	Name	Status	Hire Date	Termination Date	Termination Reason	Job Type	Jc
<input type="checkbox"/>	Details	2122443	1919	BOEHN, F	Active	07/01/2012			Full Time	CI
<input type="checkbox"/>	Details	2980880	8946	SANDERS, JOSHUA	Active	12/14/2010			Full Time	CI
<input type="checkbox"/>	Details	2106448	6389	BALDWIN, D	Active	07/01/2012			Full Time	SI
<input type="checkbox"/>	Details	2980881	8659	SANDOS, DANISHA	Active	02/11/2009			Full Time	CI
<input type="checkbox"/>	Details	2980882	7846	MENDECK, TYLER	Active	12/01/2012			Full Time	CI
<input type="checkbox"/>	Details	2110228	4020	ARFAME, A	Active	07/01/2012			Full Time	CI

Showing Records 1 - 6 of 6



ESS Overview

Invoices

25140 - Manhattan Realtors [Change Employer] Welcome Sherry Davis 05/22/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices**
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Pending Invoices

Below is a list of invoices that are in 'Pending' status. That means that the invoices have not yet been submitted to the fund office and they are available for editing. Please click Details>Edit to modify the invoice data. When you wish to send the invoice to the fund office, please click the 'Submit' button.

Accounts: All

Invoices

Activity Date Range: All Time Invoice & Trans. Description: All

Filter Export

<input type="checkbox"/>	Actions	Trans #	Inv./Trans. Description	Trans Type	Rpt. Period Start	Rpt. Period End	Due Amount	
<input type="checkbox"/>	Details	58728616	BCI	Original	05/01/2013	05/31/2013	\$360.00	19519 Mar Street-Cape
<input type="checkbox"/>	Details	58728615	BCI	Original	05/01/2013	05/31/2013	\$0.00	19522 Mar Ave-Cape

Showing Records 1 - 2 of 2

Delete Submit Create Invoice Create Adjustment



ESS Overview

Payment Processing

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing**
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Process Payments

Below is a list of released invoices with an open balance that need to be paid or allocated. 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 please click the 'View Details' link in the action column. If you wish to review prior monetary allocations for the invoice please click the 'View Balance' link in the action column.

Account:
Activity Description:
19519 Manhattan Realtors-25 West 64th Street-Capel - Residential
19521 Manhattan Realtors-1220 Park Avenue-Capel - Residential
19522 Manhattan Realtors-1276 Fulton Ave-Capel - Residential

Filter Print Export

<input type="checkbox"/>	Details	Invoice #	Transaction Type	Invoice & Trans. Description	Due Date	Account # - Name	Original Amount
<input type="checkbox"/>	View	58723928	Original	BCI	04/20/2013	19519 - Manhattan Realtors-25 West 64th Street-Capel - Residential	\$2,058.00
<input type="checkbox"/>	View	58723930	Original	BCI	04/20/2013	19521 - Manhattan Realtors-1220 Park Avenue-Capel - Residential	\$3,087.00
<input type="checkbox"/>	View	58723929	Original	BCI	04/20/2013	19522 - Manhattan Realtors-1276 Fulton Ave-Capel - Residential	\$1,029.00



ESS Overview

Transactions

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions**
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Transactions

Below is a list of Transactions and Released Invoices. You can filter this page using a variety of criteria. You can also view the payment/allocation in the actions column.

Account:
All
19518 Manhattan Realtors
19519 Manhattan Realtors-25 West 64th Street-Capel - Residential
19521 Manhattan Realtors-1220 Park Avenue-Capel - Residential
19522 Manhattan Realtors-1276 Fulton Ave-Capel - Residential

Balance:

Transaction Types:

Activity Date:

Status:

<input type="checkbox"/>	Actions	Trans #	Trans Type	Inv./Trans. Description	Account	Rpt. Period Start	Rpt. Period Stop
--------------------------	---------	---------	------------	-------------------------	---------	-------------------	------------------



ESS Overview

Uploaded Files

Last Logon 05/22/2013 | Account | Logout

25140 - Manhattan Realtors [Change Employer] Welcome Sherry Davis 05/22/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
 - Uploaded Files**
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Uploaded Files

The grid below contains all uploaded files by users in your organization. If you are processing a file and you find errors, you can use the 'File Details' section to make corrections. Once you have corrected all errors, click the 'Validate' button. If the system validates the file without errors, you can then click the 'Process' button to load the data into the system. Please note that data rows in the file will process even with 'Warning' messages, but will not process with 'Exceptions'.

Status:

Activity Date Range:

Upload New File Refresh

Filter Records Print Export


Action	Imported Date	Status	File Type	Processed Date	File Description	Records	Description
--------	---------------	--------	-----------	----------------	------------------	---------	-------------

Showing Records 1 - 0 of 0



ESS Overview

Employer Administration

Last Login: 04/12/2013 | Account | Logout

25140 - Manhattan Realtors (Change Employer)

Welcome Sherry Davis 04/13/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Employer Administration

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

Manage PCX Accounts

Manage PCX Accounts

Employer Contacts

Add

Filter Print Export

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
EHARDNESS	HARDIN, ERICA	Active		Female		ehardin@32bjfunds.com	Edit Delete
SDAVIS	DAVIS, SHERRY	Active	Primary Billing Contact	Female		sdavis@manrealors.com	Edit Delete


Account Contacts

Account:

Add

Filter Print Export

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
-----------	------	--------	------	--------	------------	-------	--------



ESS Overview

Accounts

32BJ SEIU BENEFITS

25140 - Manhattan Realtors (Change Employer) Last Login: 04/12/2013 Account | Logout

Welcome Sherry Davis 04/12/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploadable Files
- Accounts** (highlighted)
- Employer Administration
- Employee Information
- Contact Us
- Reports

Accounts

Account: 19519
19519 Manhattan Realtors-25 West 64th Street-Capet - Residential
19521 Manhattan Realtors-1220 Park Avenue-Capet - Residential
19522 Manhattan Realtors-1276 Fulton Ave-Capet - Residential

Account

Account Id:	19519	Type:	
Code:	19519	Status:	Active
Account Name:	Manhattan Realtors-25 West 64th Street-Capet - Residential	Status Date:	
Account #:	25140-889-3821	Account End Date:	
Account Effective Date:	Jul 1, 2012	Type (CP/VA/RS):	Residential
District:	New York Metro	Sub-Region:	
Sector:	Apartment		
# of Active Employees:	2		

Work Location Address

25 WEST 64TH STREET
New York, NY US 10023-0000

Contacts

The following people and organizations are designated as official account contacts.

Filter Print Export

Name	Title	Phone	Email	Fax	Gender	Action
------	-------	-------	-------	-----	--------	--------

[Add Contact](#)

© 2013 32BJ SEIU - C-000



ESS Overview

Employer Information

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information**
- Contact Us
- Reports

Employer Information

Demographics

Employer #: 25140 Employer Name: Manhattan Realtors
Federal Tax No:

[Edit](#)

Address

21 BOND ST
NEW YORK, NY US 10012-2451

[Edit](#)

Contacts

[Filter](#) [Print](#) [Export](#)

Other Party Name	Role	Gender	Work Phone	Email	Action
Harsh, Erica		Female		eharsh@32bjfunds.com	Edit Delete
Davis, Sherry	Primary Billing Contact	Female		sdavis@manrealors.com	Edit Delete

[Add Contact](#)

Showing Records 1 - 2 of 2



ESS Overview

Contact Us

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer information
 - Contact Us**
- Reports

Contact Us

Name	Value
Employer:	25140 Manhattan Realtors
ESS User:	1627 SDAVIS
Notification Date:	04/13/2013
Notification "As of" Date:	//
Reason:	<div style="border: 1px solid black; background-color: yellow; padding: 5px;"><p>Employer Name Change</p><p>Gain of Work Location</p><p>Loss of Work Location</p><p>Work Location Demographic Change</p><p>Brigade Notification</p><p>Form Request</p><p>Other Notification</p></div>
If account based: Account:	
If work location based: Work Location:	
If loss of account: Reason for Loss/New Employer:	
If form request: Form Type:	
Message/Notes:	
Request a call back?:	<input type="checkbox"/>
Uploaded a signed contract/ rider ?:	<input type="checkbox"/>

Agenda



ESS Overview



Updating Demographic Data



Processing Roster Changes



Invoice Processing



Reports



Recap

Updating Demographic Data

Employee Roster

- List of all Employees
- Filter and Export
- Details display Roster Information and Participant Demographics Tabs

The screenshot displays the 'Roster' page in a web application. On the left, there are 'Shortcuts' and a 'Menu' with 'Roster' highlighted. The main area shows a table of employees with columns for ID #, SSN, Name, Status, Hire Date, Termination Date, Termination Reason, Job Type, and Job Code. The 'Filter' and 'Export' buttons are circled in red. A blue arrow points to the 'Roster' menu item.

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster**
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Roster

The information below represents your employee roster. You can use the filter options to view this across all accounts, or narrow it down to a specific account. Click on "Details" to view information about any 'On Leave' records and Wage Rates.

Account:

Filter Records Print Export

<input type="checkbox"/>	Details	ID #	SSN	Name	Status	Hire Date	Termination Date	Termination Reason	Job Type	Job Code
<input type="checkbox"/>	Details	2122443	1919	BOSMAN, F	Active	07/01/2012			Full Time	CI
<input type="checkbox"/>	Details	2980880	8946	SIMPSON, JOSHUA	Active	12/14/2010			Full Time	CI
<input type="checkbox"/>	Details	2106448	6389	BOLTON, D	Active	07/01/2012			Full Time	SI
<input type="checkbox"/>	Details	2980881	8659	SAMMONS, DANISHA	Active	02/11/2009			Full Time	CI
<input type="checkbox"/>	Details	2980882	7846	MENDRICK, TYLER	Active	12/01/2012			Full Time	CI
<input type="checkbox"/>	Details	2110226	4020	SMITHS, A	Active	07/01/2012			Full Time	CI

Updating Demographic Data

Employer Information

- Displays employer demographics, address, and contacts
- Allows information to be edited.

The screenshot shows a web interface for 32BJ SEIU. At the top left, there are logos for 32BJ and SEIU. Below them is the text "25140 - Manhattan Realtors (Change Employer)".

On the left side, there is a navigation menu with sections: "Shortcuts" (Create Invoice, Process New Hire, Upload a File, Help and Support), "Menu" (Home, Register, Invoicing, Payment Processing, Transactions, Uploaded Files, Employee Administration, Accounts, **Employer Information**, Contact Us, Reports), and "Reports". The "Employer Information" menu item is highlighted with a blue oval.

The main content area is titled "Employer Information" and is divided into three sections:

- Demographics:** Shows Employer # 25140, Employer Name: Manhattan Realtors, Federal Tax No., Legacy Fund#, and Legacy Union#. Below this is an "Edit" button.
- Address:** Shows 21 BOND ST, NEW YORK, NY US, 10012-2451. Below this is an "Edit" button.
- Contacts:** Includes a table with columns: Other Party Name, Role, Gender, Work Phone, and Email. Below the table is an "Add Contact" button.

The table contains the following data:

Other Party Name	Role	Gender	Work Phone	Email
Harkin, Erica		Female		eharkin@32bjfunds.com
Davis, Sherry	Primary Billing Contact	Female		sdavis@ncrealtors.com



Agenda



ESS Overview



Updating Demographic Data



Processing Roster Changes



Invoice Processing



Reports



Recap

Processing Roster Changes

Processing New Hires

- Shortcuts
- Roster tab, then Actions drop down

Process Employee Status Changes

Shortcuts

- Create Invoice
- Process New Hire**
- Upload a File
- Help and Support

Home

News

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Roster

The information below represents your employee roster. You can use the filters to a specific account. Click on "Details" to view information about any 'On Lea

Account: All

Active:

Activity Date Range: All Time

Search:

Process New Hire

Export

	ID #	SSN	Name
<input type="checkbox"/> Details	2110228	4020	JOHNSON, A
<input type="checkbox"/> Job Change			
<input type="checkbox"/> Terminate	1919		JOHNSON, F
<input type="checkbox"/> Transfer			
<input type="checkbox"/> New Leave / End Leave	6389		JOHNSON, D
<input type="checkbox"/> Wage Rate Change			
<input type="checkbox"/> Modify / Delete Wage Rate	7846		JOHNSON, TYL
<input type="checkbox"/> Modify Job Type / Class			
<input type="checkbox"/> Modify / Delete Leave	8946		JOHNSON, JOSHUA
<input type="checkbox"/> Modify / Delete Hire Date			


Filter Export


Processing Roster Changes

Processing a Termination

Terminate CLOSE

A Termination will be processed for BRENT, [REDACTED]

Termination Date: 

Termination Reason: 

Processing Roster Changes


Modify/Delete Leave of Absence


Modify / Delete Leave CLOSE

A Leave modification will be processed for **BOJMAN, F**, SSN XXX-XX-1919 . Please verify the Leave Information below before continuing

Delete:

Leave Reason:

Leave Start Date: 

Leave Stop Date: 

Agenda



ESS Overview



Updating Demographic Data



Processing Roster Changes



Invoice Processing



Reports



Recap

Invoice Processing

Invoice Processing

- Create an invoice manually from the Invoice tab
- Upload an import file
- Submit an invoice



The screenshot displays the 32BJ SEIU web portal interface. At the top left, the 32BJ SEIU logo is visible. The top right corner shows the user's last login information: "Last Logon 04/12/2013 | Account | Logout". Below the logo, the user's name and email are displayed: "25180 - Matthew Redders (Change Employer)" and "Welcome Sherry Davis 04/13/2013".

The main content area is titled "Create New Invoice". Below the title, there is a text instruction: "Please select how you would like create a new Invoice. You have exported data from another system and you wish to upload it, click 'Create Invoice From File'. If you want to create a invoice report manually, click 'Create Invoice Online'".

Two buttons are provided for selection: "Create Invoice From File" and "Create Invoice Online", separated by the word "OR".

On the left side, there is a navigation menu with the following items:

- Shortcuts
 - Create Invoice
 - Process Now Here
 - Upload a File
 - Help and Support
- Menu
 - Home
 - Center
 - Invoices (highlighted)
 - Payment Processing
 - Transactions
 - Unlinked Files
 - Employee Administration
 - Accounts
 - Employer Information
 - Contact Us
 - Reports



Invoice Processing

Invoice Processing

25140 - Manhattan Realtors [Change Employer] Welcome Sherry Davis 05/22/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices**
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Pending Invoices

Below is a list of invoices that are in 'Pending' status. That means that the invoices have not yet been submitted to the fund office and they are available for editing. Please click Details>Edit to modify the invoice data. When you wish to send the invoice to the fund office, please click the 'Submit' button.

Accounts: All

Invoices

Activity Date Range: All Time Invoice & Trans. Description: All

Filter Export

<input type="checkbox"/>	Actions	Trans #	Inv./Trans. Description	Trans Type	Rpt. Period Start	Rpt. Period End	Due Amount	
<input type="checkbox"/>	Details	58728616	BCI	Original	05/01/2013	05/31/2013	\$360.00	19519 Mar Street-Cap
<input type="checkbox"/>	Details	58728615	BCI	Original	05/01/2013	05/31/2013	\$0.00	19522 Mar Ave-Cape

Showing Records 1 - 2 of 2

Delete Submit Create Invoice Create Adjustment



Invoice Processing

Invoice Processing

- Create Invoices on-line
- Displays Reporting Cycle, Contract Provisions, Roster Data, etc.

The image displays two screenshots of the SEIU 32BJ web portal interface. The left screenshot shows the 'Pending Invoices' section, where a table lists invoices with columns for 'Actions', 'Trans ID', and 'Invoice & Trans'. A red circle highlights the 'Create Invoice' button at the bottom of the table. The right screenshot shows the 'Create New Invoice' section, where two buttons are visible: 'Create Invoice From File' and 'Create Invoice Online'. The 'Create Invoice Online' button is circled in red. Both screenshots include a sidebar menu with 'Invoices' highlighted and a top navigation bar with user information.

Left Screenshot: Pending Invoices

25100 - Manhattan Realtors (Change Employee)

Shortcuts: Create Invoice, Process New Hire, Upload a File, Help and Support

Menu: Home, Invoices, Payment Processing, Transactions, Unloaded Files, Employer Administration, Accounts, Employer Information, Contact Us, Reports

Pending Invoices

Below is a list of invoices that are in 'Pending' status. If you need to change the invoice to the fund office, please click the 'Submit' button.

Actions: All

Invoices

Active Date Range: All Time

File	Export	Actions	Trans ID	Invoice & Trans
<input type="checkbox"/>		Details	50724199	BO
<input type="checkbox"/>		Details	50724200	BO
<input type="checkbox"/>		Details	50724195	BO

Buttons: Delete, Submit, **Create Invoice**, Create

Top Right: Last Login: 04/12/2013 | Account | Logout

Welcome Sherry Davis 04/12/2013

Right Screenshot: Create New Invoice

25100 - Manhattan Realtors (Change Employee)

Shortcuts: Create Invoice, Process New Hire, Upload a File, Help and Support

Menu: Home, Invoices, Payment Processing, Transactions, Unloaded Files, Employer Administration, Accounts, Employer Information, Contact Us, Reports

Create New Invoice

Please select how you would like to create a new invoice. You have exported data from another system and you wish to upload it, click 'Create Invoice From File'. If you want to create a invoice report manually, click 'Create Invoice Online'.

Buttons: **Create Invoice From File**, **Create Invoice Online**

Top Right: Last Login: 04/12/2013 | Account | Logout

Welcome Sherry Davis 04/12/2013



Invoice Processing

Invoice Processing

32BJ SEIU
25140 - Manhattan Realtors (Change Employer) | Welcome Sherry Davis 05/22/2013 | Last Login: 05/22/2013 | Account | Logout

Shortcuts
Create Invoice
Process New Hire
Upload a File
Help and Support

Menu
Home
Roster
Invoices
Payment Processing
Transactions
Uploaded Files
Employer Administration
Accounts
Employer Information
Contact Us
Reports

Create Invoice Online

You have chosen to manually create a invoice online. First fill out the invoice details. Then select the accounts that you wish to generate invoices for.

Accounts: All

Invoice Type: 401K Invoice

Accounts
To create invoices for multiple accounts, select the desired accounts in the grid and then click the 'Create Invoice' button.

Shortcuts
Create Invoice
Process New Hire
Upload a File
Help and Support

Menu
Home
Roster
Invoices
Payment Processing
Transactions
Uploaded Files
Employer Administration
Accounts
Employer Information
Contact Us
Reports

Create Invoice Online

You have chosen to manually create a invoice online. First fill out the invoice details. Then select the invoices for.

Accounts: All

Invoice Type: BCI

Accounts

To create invoices for multiple accounts, select the desired accounts in the grid and then click the 'Create Invoice' button.

<input type="checkbox"/>	Acct. #	Acct	Invoice Type	Prior Rpt. Period
<input type="checkbox"/>	19521	Manhattan Realtors-1220 Park Avenue-Capel - Residential	BCI	05/01/2013
<input type="checkbox"/>	19522	Manhattan Realtors-1275 Fulton Ave-Capel - Residential	BCI	05/01/2013
<input type="checkbox"/>	19519	Manhattan Realtors-25 West 64th Street-Capel - Residential	BCI	05/01/2013

Create Invoice



Invoice Processing

Invoice Processing

- Upload a File

The image shows two screenshots of the SEIU 32B-J web portal. The top screenshot shows the 'Create New Invoice' page with the 'Upload a File' button circled in red. The bottom screenshot shows the 'Upload a File' page with the 'Gross Wages EDY Import' file type selected and the 'Upload' button highlighted.

Top Screenshot: Create New Invoice

25140 - Manhattan Realtors (Change Employer) Welcome Sherry Davis 05/22/2013

Shortcuts:

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu:

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Please select how you would like create a new invoice. (You have imported data from another system and you wish to upload it, click 'Create Invoice From File'. If you want to create a invoice from manual, click 'Create Invoice Online'.)

Create Invoice From File **Create Invoice Online**

Bottom Screenshot: Upload a File

25140 - Manhattan Realtors (Change Employer) Welcome Sherry Davis 05/22/2013

Shortcuts:

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu:

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Upload a File

File Type: **Gross Wages EDY Import** Description: This is where you will set up Gross Wages Import Description

File: **Browse...**

File Description:

Employer #:

Upload



Invoice Processing

Invoice Processing – Import File

Upload	Pass the validation checks to ensure the file meets the specifications.
Process	Correct any validation errors to ensure the details meet the file specifications.
Release	Submits pending invoice to 32BJ; this completes the file submission. Invoice is ready for payment.



Invoice Processing

Payment Processing

- Displays invoices in released status.
- Filter by account or date range.
- Process through Chase Pay Connexion.

Shortcuts

- Create invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing**
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

Process Payments

Below is a list of released invoices with an open balance that need to be paid or allocated. 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 please click the 'View Details' link in the action column. If you wish to review prior monetary allocations for the invoice please click the 'View Balance' link in the action column.

Account:

Activity D: 19519 Manhattan Realtors-25 West 64th Street-Capel - Residential
19521 Manhattan Realtors-1220 Park Avenue-Capel - Residential
19522 Manhattan Realtors-1276 Fulton Ave-Capel - Residential

Filter Print Export

<input type="checkbox"/>	Details	Invoice #	Transaction Type	Invoice & Trans. Description	Due Date	Account # - Name	Original Amount
<input type="checkbox"/>	View	58723928	Original	BCI	04/20/2013	19519 - Manhattan Realtors-25 West 64th Street-Capel - Residential	\$2,056.00
<input type="checkbox"/>	View	58723930	Original	BCI	04/20/2013	19521 - Manhattan Realtors-1220 Park Avenue-Capel - Residential	\$3,087.00
<input type="checkbox"/>	View	58723929	Original	BCI	04/20/2013	19522 - Manhattan Realtors-1276 Fulton Ave-Capel - Residential	\$1,029.00



32BJ

Employer Self Service (ESS)

How to Process Payments using Chase Pay Connexion

Please refer to the ESS Instructional Videos



Agenda



ESS Overview



Updating Demographic Data



Processing Roster Changes



Invoice Processing



Reports



Recap

Reports

- Pre-payment Reports by One Account
- Pre-payment Reports by All Accounts
- Post-payment Reports by One Account
- Post-Payment Reports by All Accounts
- Status Changes Reports



Agenda



ESS Overview



Updating Demographic Data



Processing Roster Changes



Invoice Processing



Reports



Recap

Recap

- Process New Hires
- Process Employee Status Changes.
- Create, process and pay an invoice.
- Reports





Employer Self-Service Training Complete!

