



32BJ Employer Self Service Portal



Log In

User Name

Password

Log In

[Forgot User Name](#) | [Forgot Password](#)

[SEIU Local 32BJ Privacy Policy and Terms of Use](#) | [32BJ Funds Privacy Policy and Terms of Use](#)



Employer Self Service (ESS) Training



WWW.32BJFundsEmployer.org



EmployerRelations@32BJFunds.com

Employer Services: (212) 388-3354

- One System
- 100% Control
- Search Engine
- Import Files





ESS Overview



Chase Pay Connexion



Demo Exercises



Recap

Employer Self Service (ESS) runs on any high speed Internet connection, but runs best on Mozilla Firefox with the preferred version ESR 60.8.0.

ESS is used by employers to:

- Report to:
 - 32BJ Funds
 - SEIU Local
- Update Roster Information, add new hires, create and pay invoices, upload invoice files.



ESS Homepage has 6 sections



Last Logon 09/21/2014 | Account | Logout

2. Shortcut Menu

1. Account Settings

4001 - ACME JANITORIAL SERVICES

Welcome Robert Brown 09/24/2014

Shortcuts

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

Home

5. Alerts

3. Navigation Menu

Menu

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

4. News

News

Alerts

- August 19, 2014 Reminder: You have Delinquent Accounts. You have not released and/or paid BCIs for all of your accounts for the July reporting period and they were due on July 20, 2014, you may also have delinquent 401(k) Invoices. x
- August 19, 2014 Reminder: You have not released and paid BCIs for all of your accounts for the last July reporting period and they are due on August 20, 2014 x
- Your request via Contact Us has been routed to the appropriate department, WF # 200027 x

Filter Export

Account Name	Work Location Name	Account #	Balance	Actions
ACME JANITORIAL SERVICES 3100 Horizon Drive-Suburban Contractors Agreement	3100 Horizon Drive	29673		
ACME JANITORIAL SERVICES 2500 Renaissance Blvd-Suburban Contractors Agreement	2500 Renaissance Blvd	29674	\$0.00	Transactions Profile
ACME JANITORIAL SERVICES 2201 Renaissance Boulevard- Suburban Contractors Agreement	2201 Renaissance Boulevard	29683	\$0.00	Transactions Profile
ACME JANITORIAL SERVICES 1001 Cedar Hollow Road-Suburban Contractors Agreement	1001 Cedar Hollow Road	29684	\$0.00	Transactions Profile
ACME JANITORIAL SERVICES 100 Chesterfield Parkway-Suburban Contractors Agreement	100 Chesterfield Parkway	29685	\$0.00	Transactions Profile

6. Employer Account Summary

Account Settings



Last Logon | [Account](#) | [Logout](#)

9522 - InvestGroup 1 [[Change Employer](#)]

Welcome John Doe 04/17/2014

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](#)

Roster

View employees by individual account or select "All" to see all employees

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

Shortcuts

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

Roster

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Roster

The information below represents your employee roster. You can use the filter options to view employees 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: All



Filter Records Print Export

<input type="checkbox"/>	Action	ID #	SSN	Name	Status	Hire Date	Termination Date	Termination Reason	Job Type
<input type="checkbox"/>	Details ▾	1579049	7909	GARCIA, RAHMAN A	Active	03/01/1986			Full Time
<input type="checkbox"/>	Details ▾	1579050	3008	FERREIRA, LUIGI	Active	10/11/2012			Full Time
<input type="checkbox"/>	Details ▾	1579051	3516	MOROCHO, NARINDER	Active	09/13/2010			Full Time
<input type="checkbox"/>	Details ▾	1579220	1895	HERNANDEZ, JOSEPH A	Active	08/14/2004			Full Time
<input type="checkbox"/>	Details ▾	1579166	8134	VELEZ JR., JASON	Active	03/01/1986			Full Time

Showing Records 1 - 5 of 5

PROCESSING ROSTER CHANGES

1. Shortcut menus enable you to **Process a New Hire**
2. Drop down menus allow for changes in status for existing employees

4551 - ACME JANITORIAL SERVICES

Welcome ROBERT BROWN 11/01/2014

Shortcuts

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

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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 more information about any On Leave records and Wage Rates.

Account: All

Action	ID #	SSN	Name	Status	Hire Date	Termination Date	Termination Reason	Job Type
Details	819967	5163	BARBOSA, SHELLY	Active	02/01/2009			Part Time
Details			JAN	Active	06/10/2013			Part Time
Details			RIA	Active	11/18/2013			Part Time
Details			ULIO	Active	05/01/2014			Part Time
Details			MMY	Active	05/01/2014			Part Time
Details			Z, ESTHER	Active	10/02/2014			Full Time

1. Add new employees to a roster by using these shortcut menus

2. Use drop down menu to make changes to existing employees on a particular roster

- Job Change
- Terminate
- Transfer
- New Leave / End Leave
- New Wage Rate
- Modify / Delete Wage Rate
- Modify Job Type / Class
- Modify / Delete Leave
- Modify / Delete Hire Date

PROCESSING A NEW HIRE

Shortcuts

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

Menu

- Home
- Roster
- Invoices

Please search for Participant using both Participant SSN and DOB together or Person ID.

Date of Birth:

SSN:

Person ID:

Shortcuts

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

Menu

- Home
- Roster

Enter Member Information

This member does not exist in our records. Please refine your search or click 'Next' if you wish to create a new Participant.

Shortcuts

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

Menu

- Home
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Select Participant

One or more records were found that matched your search. Please select a participant and click 'Next' button.

Person ID	Name	Date of Birth	City	State	Current Employment Status
3875255	SMITH, JOHN	01/01/1990			No Roster History

If you wish to create a new Participant click [here](#).

Invoices

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

Shortcuts

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

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Invoices

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 #	Invoice & Trans. Descriptio	Trans Type	Rpt. Period Start	Rpt. Period End
<input type="checkbox"/>	Details	379101	BCI	Original	04/01/2014	04/30/2014
<input type="checkbox"/>	Details	379100	BCI	Original	04/01/2014	04/30/2014

Pending invoices have not yet been submitted, and may be edited by clicking on "Details"

New Invoices in ESS:
ADF Invoice
UDI Invoice

Release Create Invoice Create Adjustment

Adjustments/Rebills

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Welcome ESS USER101 04/17/2014

Shortcuts

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

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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 #	Invoice & Trans. Descriptio	Trans Type	Rpt. Period Start	Rpt. Period End
<input type="checkbox"/>	Details	379101	BCI	Original	04/01/2014	04/30/2014
<input type="checkbox"/>	Details	379100	BCI	Original	04/01/2014	04/30/2014

Showing Records 1 - 2 of 2

Delete Release Create Invoice **Create Adjustment**

Payment Processing

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

Shortcuts

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

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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: All
Activity Date Range: All Time

	Filter	Records	Print	Export						
<input type="checkbox"/>	Details	Invoice #	Transaction Type	Invoice & Trans. Description	Due Date	Account # - Name	Original Amount	Amo Pai		
<input checked="" type="checkbox"/>	View	379104	Original	BCI	04/20/2014	40332 - InvestGroup 1-1 East 66th Street-RAB Apartment Building Agreement Master	\$5,002.6			
<input type="checkbox"/>	View	379106	Original	401K Invoice	04/17/2014	40332 - InvestGroup 1-1 East 66th Street-RAB Apartment Building Agreement Master	\$146			
<input checked="" type="checkbox"/>	View	379105	Original		04/20/2014	40333 - InvestGroup 1-1 East 66th Street-RAB Resident Managers&Superintendents Agreement	\$1,250.65			
<input type="checkbox"/>	View	379107	Original	401K Invoice		40333 - InvestGroup 1-1 East 66th Street-RAB Resident Managers&Superintendents Agreement	\$75			

Make Payment

Payment Processing

Check the box and click "View" to see details of a released invoice that needs to be paid

Payment Processing

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Welcome ESS USER101 04/17/2014

Shortcuts

- Create Invoice
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Complete Payment

Please review your list of invoices included in this payment. If correct, please select the 'Complete Payment: ACH' button to initiate your secure payment process. If you would like to change your included transactions, please click the 'Back' button.

Employer: 09522-InvestGroup 1

Records Print Export

Invoice #	Reporting Period Start Date	Reporting Period End Date	Due Date	Transaction Type	Invoice Type	Total Due Amount
379104	03/01/2014	03/31/2014	04/20/2014	Original	BCI	\$5,002.60
379105	03/01/2014	03/31/2014	04/20/2014	Original	BCI	\$1,250.65
						\$6,253.25

Total Due Amount: \$6,253.25

Back

Complete Payment: ACH

Transactions

4551 - ACME JANITORIAL SERVICES

Welcome ROBERT BROWN

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- ?

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Transactions

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 details of an individual transaction. If you wish to pay a Released Invoice, click on the 'Pay' link in the actions column.

Account: 65432 - ACME JANITORIAL SERVICES -1001 Cedar Hollow Road-Suburban Contractors

Transactions

Balance: All Balances

Transaction Types: All

Activity Date: All Time

Status: Open

Original Balance: \$1,244.50

Remaining Balance: \$1,252.84

Filter Records Export

<input type="checkbox"/>	Actions	Trans #	Trans Type	Invoice & Trans. Description	Amount	Rpt. Period Start	Rpt. Period Stop
<input checked="" type="checkbox"/>	View Allocation Details	29684	DF Invoice	29684 - EASTERN JANITORIAL SERVICES-1001 Cedar Hollow Road-Suburban Contractors Agreement		09/01/2014	09/30/2014
<input type="checkbox"/>	Pay		Union Dues and IFees Invoice	29684 - EASTERN JANITORIAL SERVICES-1001 Cedar Hollow Road-Suburban Contractors Agreement		09/01/2014	09/30/2014
<input type="checkbox"/>	View Participant Details						

Check the box and click "View" to see details of a released invoice that needs to be paid

Uploaded Files

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

Shortcuts

- Create Invoice
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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](#) [Export](#)

Imported Date	Process Status	Status	File Type	Processed Date	File Description	Records	Description	Action
11/01/2014	Ready	Not Processed	UDI and ADF Invoice Import		Employee roster as of Nov. 5, 2014	1		Details / Process
10/24/2014	Ready	Not Processed	UDI and ADF Invoice Import		Test of File upload	4		Details / Process

Showing Records 1 - 2 of 2

Uploaded Files



Account | Logout

9522 - InvestGroup 1 [Change Employer]

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Upload a File

File Type: UDI and ADF Invoice Import

File: No file selected.

File Description:

Employer ID:

Uploaded Files





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 ESS; this completes the file submission. Invoice is ready for payment

Employer Administration

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

Shortcuts

-  Create Invoice
-  Process New Hire
-  Upload a File
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Employer Administration

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


Employer Contacts

Add

 Records  Print  Export

User Name	Name	Status	Role	Work Phone	Email	Actions
ESSUSER101	SANCHEZ, SUSAN	Active	Primary General Contact		ESSUSER101@VITECH.COM	Edit Delete
USER01	DOE, JOHN	Active	Primary General Contact		ESSUSER01@VITECHINC.COM	Edit Delete

Account Contacts

Account: 

Add

 Records  Print  Export

User Name	Name	Status	Role	Work Phone	Email	Actions
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Accounts

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

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Accounts

Account: 40332 InvestGroup 1-1 East 66th Street-RAB Apartment Building Agreement Master

Account Information

Account Id: 40332
Code: 40332
Account Name: InvestGroup 1-1 East 66th Street-RAB Apartment Building Agreement Master
Account #: 9522-114250-225
Account Effective Date: Jun 1, 2013
District: New York Metro
Sector: Apartment
of Active Participants: 4

Status Date:
Account Stop Date:
Type Of Work: Residential
Sub-Sector:

Select work address location to view different accounts for this employer

Work Location Address

1 EAST 66TH STREET
NEW YORK, NY US 10021-0000

Contacts

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

Filter Records Print Export

Name	Title	Phone	Email	Gender	Actions
------	-------	-------	-------	--------	---------

Showing Records 1 - 0 of 0

Add Contact

Employer Information

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

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Employer Information

Demographics

Employer #: 09522

Employer Name: InvestGroup 1

Federal Tax No: 00-0005001

Edit

*Displays employer Name, Employer Number, Tax ID, Business Address and Contacts

*Allows information to be edited

Address

1513 Water Drive
NEW YORK, NY US 10013-0000

Edit

Contacts

Filter Records Print Export

Name	Role	Gender	Work Phone	Email	Action
Sanchez, Susan	Primary General Contact	Female		ESSUSER101@VITECH.COM	Edit Delete
Doe, John	Primary General Contact	Male		ESSUSER01@VITECHINC.COM	Edit Delete

Showing Records 1 - 2 of 2





Add Contact

Notify Us

9522 - InvestGroup 1 [Change Employer]

Welcome ESS USER101 04/17/2014

Shortcuts

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Notify Us

* Effective Date (of Change):

* Reason:

Work Location Code:

Work Location Name:

Account #:

Old/New Employer Names:

Comments:

Add New

Roster Information File must be received within 20 days from the effective date of the account change.

Reports



10478 - InvestGroup22 [Change Employer]

Shortcuts

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

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Reports

Report:

Select

- Employer ACA1095C Detail Report
- Invoice Details 32BJ FUNDS Report
- Invoice Details 32BJ UNION Report
- Notify Us Workflow Report
- Participant Roster Change Report

Reporting Period Start Date:

Report Period End Date:

Invoice Status:

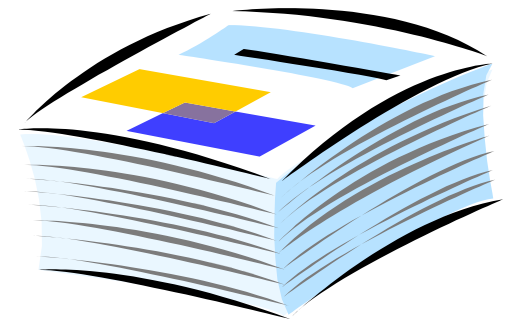
Transaction Status:

Show Report

Select report criteria, such as Report Type, Date of Reporting Period, Invoice and Transaction Status

Reports

- Pre-payment Reports by One Account or All Accounts for benefits or dues
- Post-payment Reports by One Account or All Accounts for benefits or dues
- Employer ACA 1095C Details
- Notify Us Workflow created
- Member Status Changes
- ESS Account Status Changes





ESS Overview



Chase Pay Connexion



Demo Exercises



Recap



32BJ

Employer Self Service (ESS)

**How to process payments using
Chase Pay Connexion**





ESS Overview



Chase Pay Connexion



Demo Exercises



Recap



Processing Participant



Processing Roster Changes



Invoice Processing



Payments



ESS Overview



Chase Pay Connexion



Demo Exercises



Recap

- Process New Hire
- Process Employee Status Changes
- Create, Process and Pay an invoice, Review Transactions
- Account Changes –Notify Us
- Reports



Maintain employee information and pay remittances – with a Click of a Button!

[CLICK HERE TO LOG IN](#) >

Employer Self-Service (ESS)

The Employer Self-Service (ESS) is a web-based system used by **Employers** to maintain **employee roster** information, remittance of required Benefit Fund Contributions and 401 (k) wage deferrals. In the near future, Union Dues and ADF wage deferrals will also be made via ESS.

Quick Links

- Schedule your Workshop for ESS Union Implementation
- ESS Interactive Training
- Employer Self-Service (ESS) Training Powerpoint
- Employer Self-Service (ESS) User Quick Guide
- Report A Change To Your Account
- Proofpoint Encryption User Guide





Employer Self-Service Training Complete!