EmployerXG

QuickGuide

April 2017

Introduction

The **EmployerXG** portal offers you

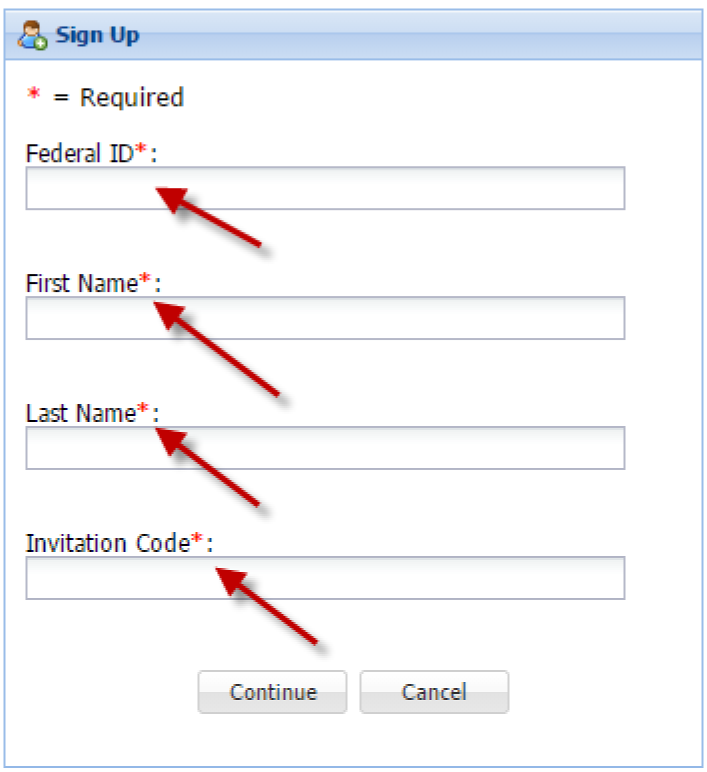
- Remittance data entry and payment using the Internet
- Self-service access to remittance history
- Self-service address and contact maintenance

The **EmployerXG** portal consists of a tool bar, screens, a Group field, and additional information depending upon the screen selected. ***Note***: If you are an administrator, you have access to all screens.

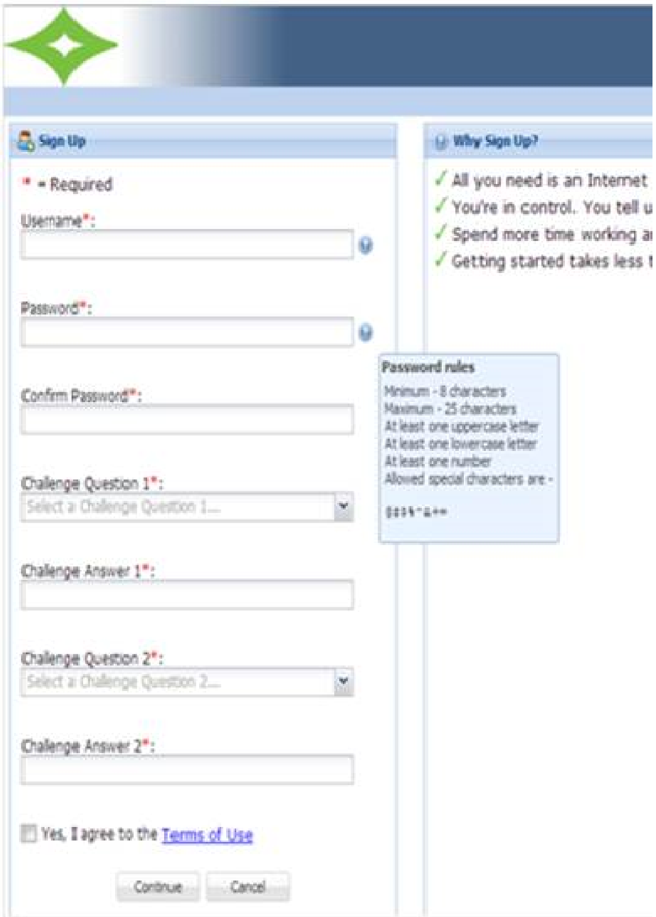
Signing Up

1. Access the EmployerXG website.
2. Before you can sign in for the first time, you need to create an account. To begin this process, click the **Sign Up** link located at the bottom right of the screen.

   The **Sign Up** screen displays, from which you create a user name and profile.



3. Enter your **Federal ID** number (with no dash).
4. Enter your **First Name** and **Last Name** exactly as it appears on your Portal Authorization sheet.
5. Enter the **Invitation Code**. ***Note***: It is recommended that you copy and paste this code from the invitation email that was sent to you since the code is case-sensitive.
6. Click the **Continue** button and the screen changes to display user credential fields (see following screen).



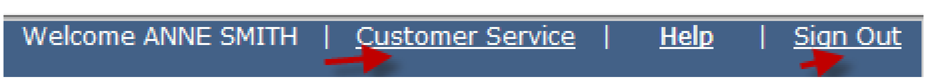
7. Enter your **Username** and **Password**. ***Note***: To view the requirements for your username and password, hover your mouse over the blue icon next to the fields.
8. Select your **Challenge Questions and Answers**.
9. View the **Terms of Use** and select the "**Yes, I agree to the Terms of Use**" checkbox.

   Your account is created and you may sign in.

Toolbar

The Tool Bar contains the following options (see screen example).

- **Customer Service**—access Frequently Asked Questions (FAQs)
- **Sign Out**—exit EmployerXG



Screens

EmployerXG contains the following screens.

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

Home

When you select **Home**, the **Your Remittances Due** screen displays (see following example).

Your Remittances Due

Open Copy Upload No Work

Ref No	Due Date	Status	Past Due	Employer Number
D89417	02/15/2010	In Cart	!	128600000
F63447	08/15/2017	In Progress		128600000
F63445	06/15/2017	In Progress		128600000
F63443	04/15/2017	In Progress		128600000
F63442	03/15/2017	In Progress		128600000

Note that years without remittances do not display in the listing.

From the **Home** screen, you can

- Open a remittance
- Copy an existing remittance
- Create a No Work remittance
- Create a new remittance
- View remittances that have been submitted (replaces the file uploads that used to display above the News & Information box)
- Access remittance details on the History tab
- View remittances that are in your Cart or that are Saved for Later
- Access valuable links such as news and events

Open a remittance

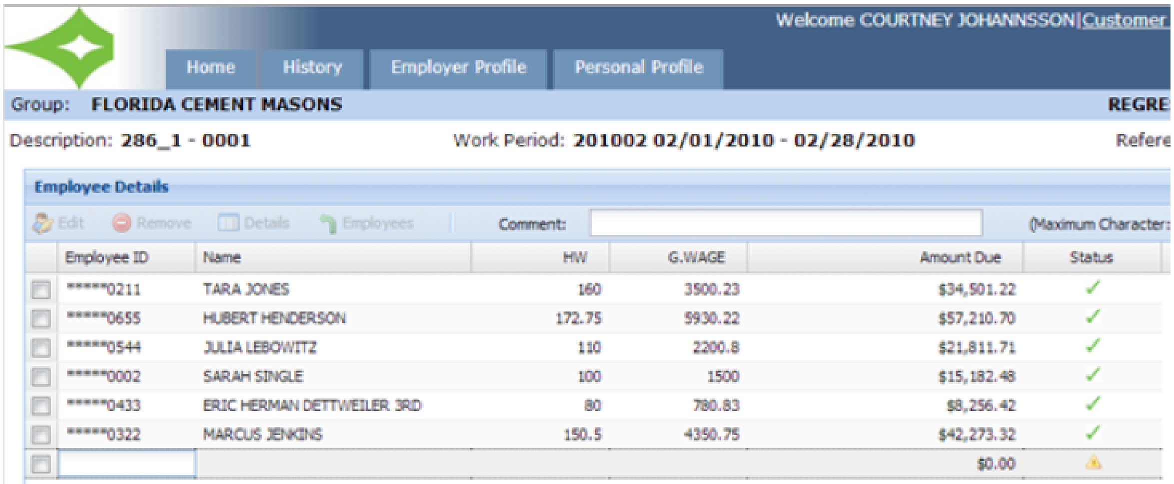
1. On the **Home** tab, click the arrow to the right of the **Group** field and select a Group from the dropdown menu if the default Group is not the one you want.

   The list of remittances for your group displays in the **Your Remittances Due** table. ***Note***: Delinquent remittances are indicated by a red exclamation mark.

2. From the **Your Remittances Due** table, select the remittance that you want to view and then click the **Open** icon above the **Due Date** column heading. You can also double-click the remittance and not use the **Open** icon.

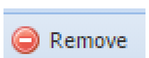
   If you click on a remittance that is "*In Progress*," you are returned to the last screen you accessed.

   If you click on a remittance that is "*Due*," the **Employee Details** table displays with a blank **Employee ID** field highlighted.(example).



Remove employee from remittance

1. Select the remittance from which you want to delete the employee and then click **Open**.
2. Select the employee that you want to delete and click **Remove**.



Edit employee information on an existing remittance

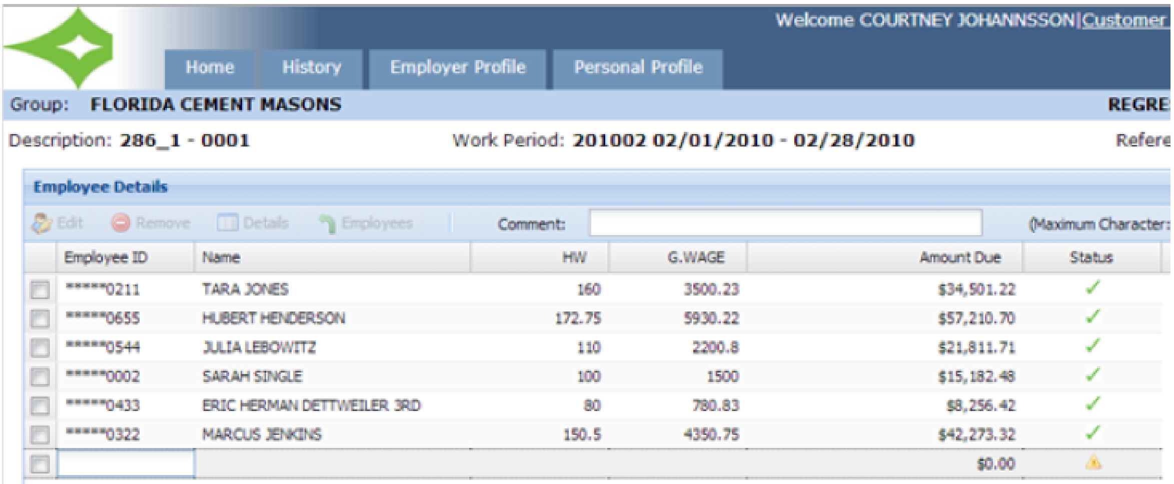
1. On the **Home** tab, click the arrow to the right of the **Group** field and select a Group from the dropdown menu if the default Group is not the one you want.

   The list of remittances for your group displays in the **Your Remittances Due** table.

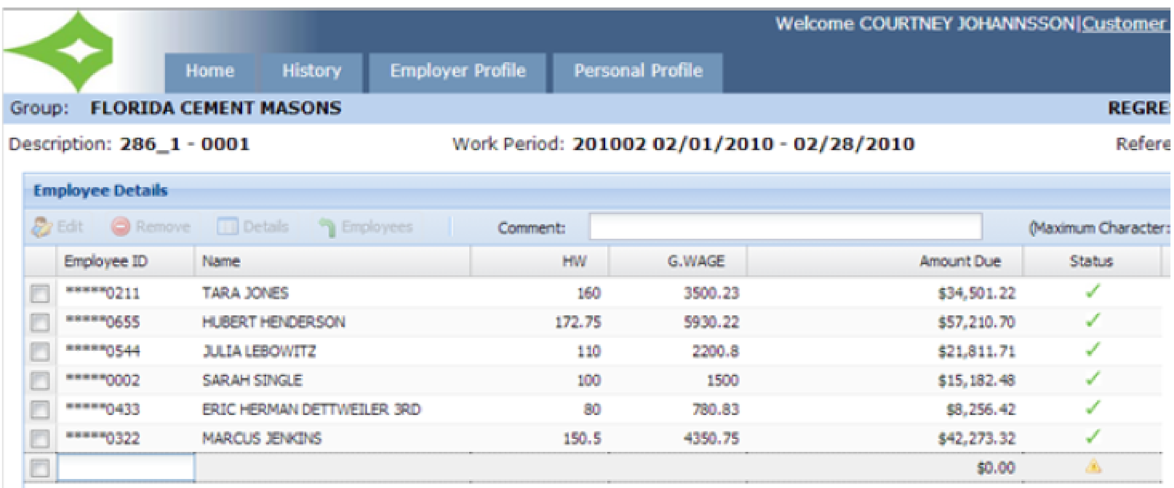
2. From the **Your Remittances Due** table, click once on the remittance in which you want to edit new employee information and then click the **Open** icon above the **Due Date** column heading. You can also double-click the remittance and not use the **Open** icon.

   If you click on a remittance that is "*In Progress*," you are returned to the last screen you accessed.

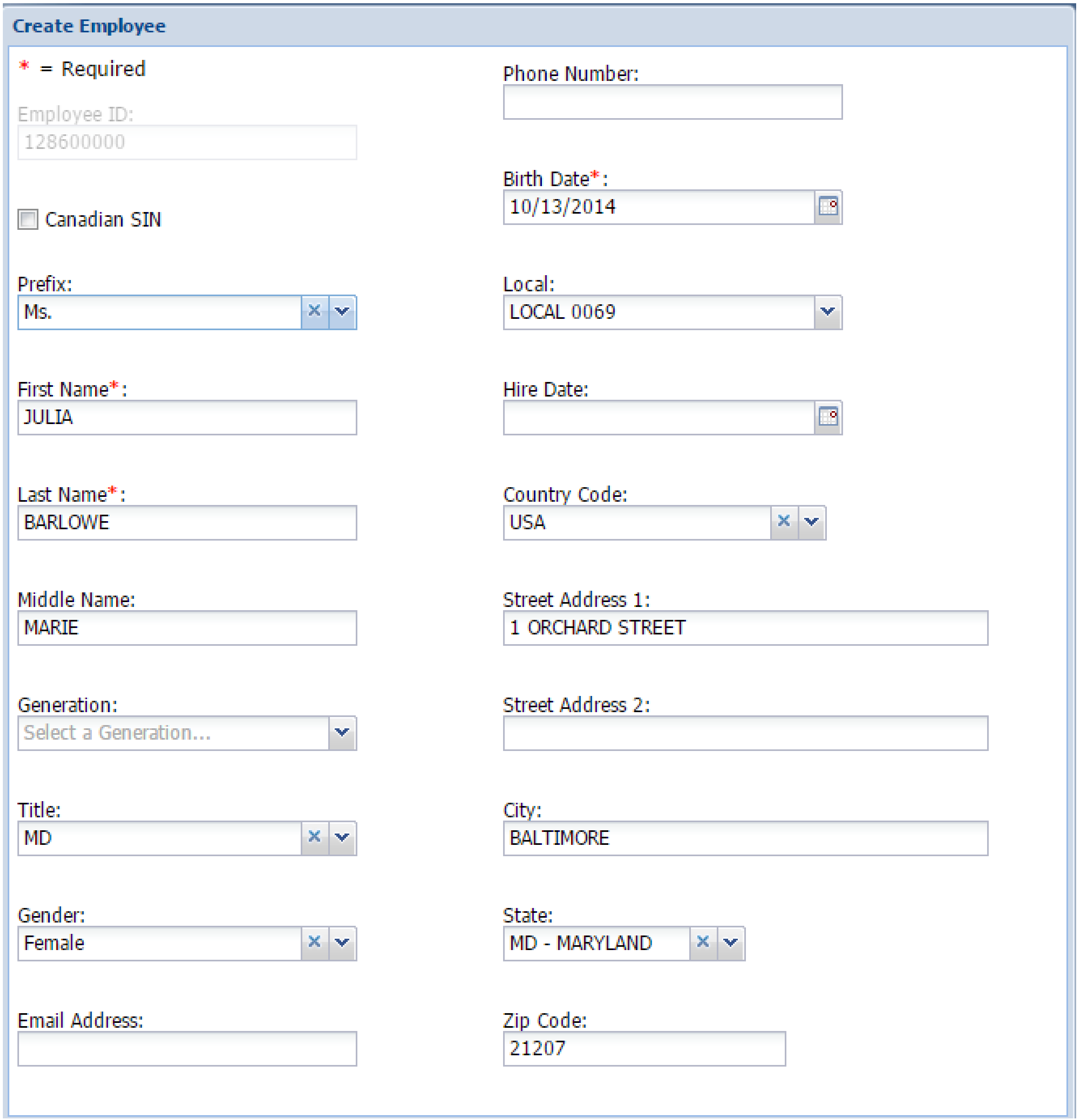
   If you click on a remittance that is "*Due*," the **Employee Details** table displays with a blank **Employee SSN** field highlighted (example).



3. Select the employee whose information you want to edit and click the **Edit** icon above the **Employee SSN** column heading.



4. A **Create Employee** popup displays populated with the information of the employee you selected (example).



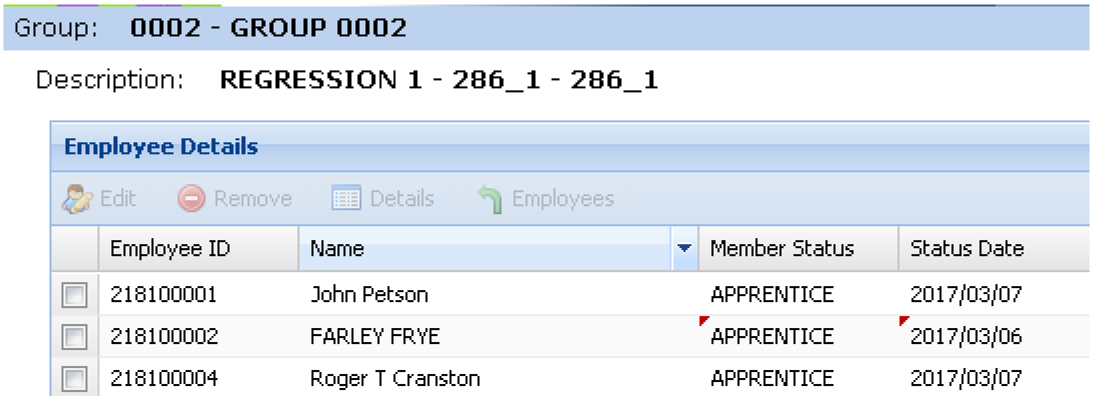
5. Update the desired information and click **Save**.

Add a new employee to an existing remittance

1. From the **Your Remittances Due** table, click once on the remittance to which you want to add a new employee and then click the **Open** icon above the **Due Date** column heading. You can also double-click the remittance and not use the **Open** icon.

   If you click on a remittance that is "*In Progress*," you are returned to the last screen you accessed.

If you click on a remittance that is “*Due*,” the **Employee Details** table displays with a blank **Employee SSN** field highlighted (example).



2. Enter the **Employee ID** of the employee that you want to add to the remittance and press **Enter.**

3. At a minimum, complete the required fields, which are noted by an asterisk.

4. Click **Save**.

   The system fills in the **Name** field and highlights the **HW** field in the Employee Details table.

5. Enter the **HW.**

   The system automatically enters the **Amount Due** and the **Status**, and displays another blank **Employee Detail** row into which you can add another employee.

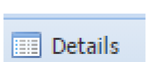
   The system also updates the **Remittance Summary** table at the bottom of the screen with newly-added employee information. You can display the summary by **Fund**, **Quantity**, or **Rate**. You can also export employee information by using the **Export** button. The information is exported in .csv format.

Note: You can select another employer to which to add a new employee. Use the **Remitter** dropdown menu located above and to the right of the Employee Details table and select the desired employer from the list of employers (see the first screen example where MS CONSTRUCTION is the selected employer). The name of the Remitter field is based on the configuration set in the EmployerXG Administrator's tool. Employers must be configured in ContributionsXG to use the Remitter field.

View calculation details for an employee

1. Select the remittance for which you want to display employee calculation information and then click **Open**

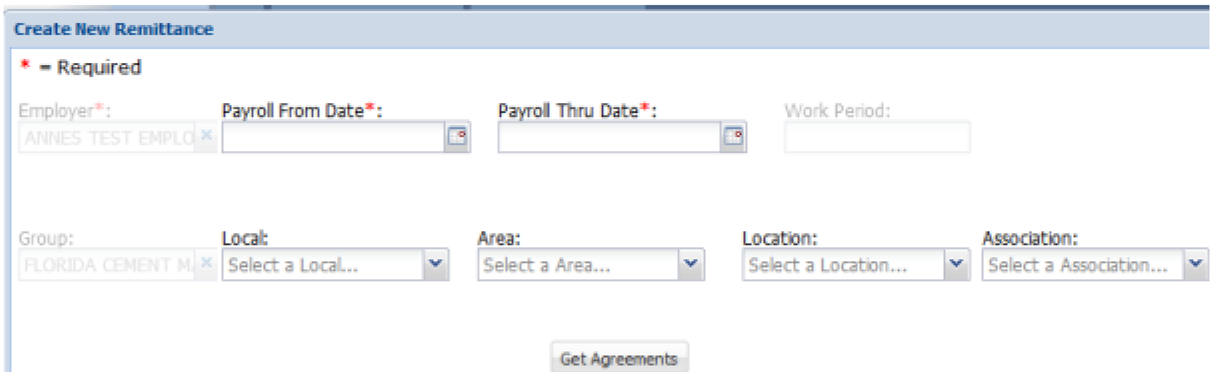
2. Select the employee whose calculation information you want to view and click **Details**.



Create a new remittance

1. From the **Your Remittances Due** table, click **Create Remittance**.

The **Create New Remittance** screen displays.



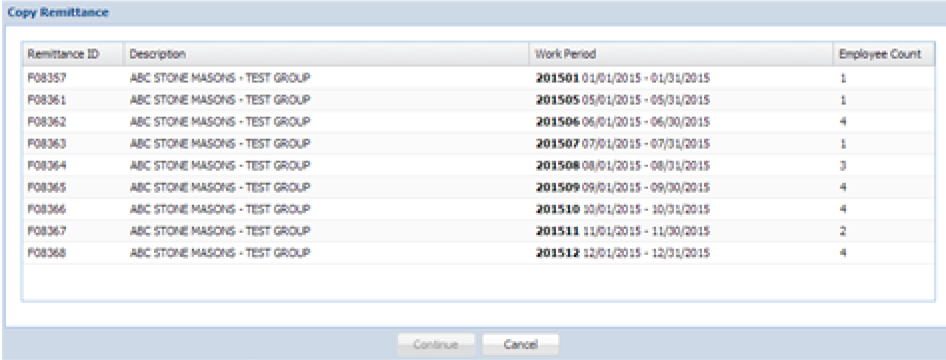
2. At a minimum, enter information into the **Payroll From Date** and **Payroll Thru Date** fields in MM/DD/YYYY format or use the calendar icon to the right of each Payroll field to select the dates.
3. Click **Get Agreements**.
4. Select the appropriate agreement from the **List of Agreements** screen.
5. Click **Continue**.

   You will receive a confirmation and are returned to the **Your Remittances Due** table with the newly-created remittance highlighted. You may then choose to upload the remittance.

Copy an existing remittance

1. From the **Your Remittances Due** table, select the remittance that you want to copy to and then click **Copy**.

2. From the **Copy Remittance** window, select the remittance that you want to copy (see following screen example) and press **Continue**.



Copy Remittance

Remittance ID	Description	Work Period	Employee Count
F08357	ABC STONE MASONS - TEST GROUP	**201501** 01/01/2015 - 01/31/2015	1
F08361	ABC STONE MASONS - TEST GROUP	**201505** 05/01/2015 - 05/31/2015	1
F08362	ABC STONE MASONS - TEST GROUP	**201506** 06/01/2015 - 06/30/2015	4
F08363	ABC STONE MASONS - TEST GROUP	**201507** 07/01/2015 - 07/31/2015	1
F08364	ABC STONE MASONS - TEST GROUP	**201508** 08/01/2015 - 08/31/2015	3
F08365	ABC STONE MASONS - TEST GROUP	**201509** 09/01/2015 - 09/30/2015	4
F08366	ABC STONE MASONS - TEST GROUP	**201510** 10/01/2015 - 10/31/2015	4
F08367	ABC STONE MASONS - TEST GROUP	**201511** 11/01/2015 - 11/30/2015	2
F08368	ABC STONE MASONS - TEST GROUP	**201512** 12/01/2015 - 12/31/2015	4

Continue Cancel

If the contracts associated with the remittances match, the ID, Name, and Quantities, or just the ID and Name will be copied, depending on your setup.

If the contracts associated with the remittance do not match, regardless of your configuration, only the ID and Name are copied.

3. From the **Employee Details** table, delete or add employees, and quantities, as necessary.
4. Select the **Add To Cart** button.
5. Proceed to your Cart or Return Home to complete additional Remittances.

Upload and pay a remittance

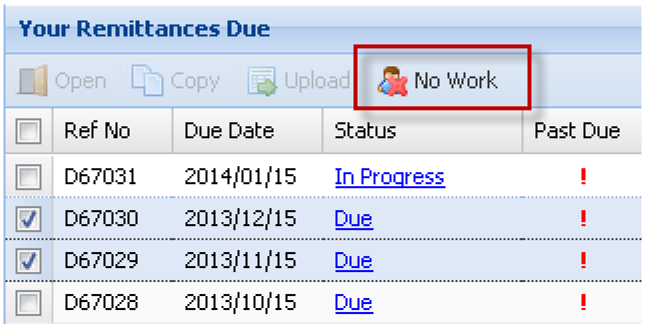
Note: You can only upload "Due" remittances if your system is configured to allow it.

1. From the **Your Remittances Due** table, select the remittance that you want to upload and then click **Upload**.
2. Browse to the file that you want to upload, select the file, and click **Upload File.** The first fifteen rows of data display for verification.

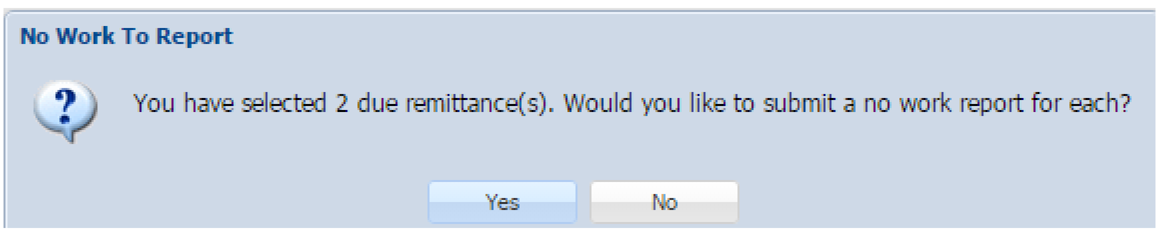
3. Click the **Next** button in the Wizard. Your data is analyzed and calculated, and the Employee Details screen for the remittance displays.
4. At the bottom of the **Employee Details** screen, click **Add To Cart - Proceed to Cart**.
5. Set the payment details **In Cart** (Due, Due+Damages, Other).
6. Verify Payment Summary.
7. Click **Apply Payment**.
8. Navigate to History page.
9. Select the remittance.
10. Click **Confirmation**.

Create a No Work remittance

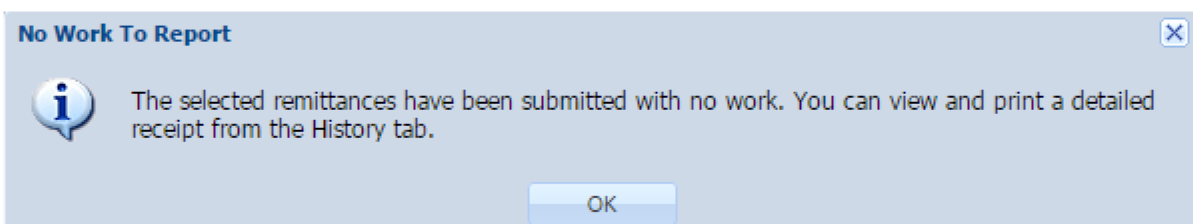
1. Select the Due remittance(s) to which you want to apply No Work.
2. Click **No Work**.



The **No Work To Report** popup box displays (see following screen). Note that the No Work option is disabled for remittances that are In Progress.



If you click "Yes," you receive the following popup (see following screen). (If you select "No," the selected remittance are not submitted with no work.)



3. If you have selected "Yes," click **OK** and click the History tab if you want to view or print the PDF receipt for each remittance.
4. Open the PDF to view the **Remittance Receipt** (see following screen example).

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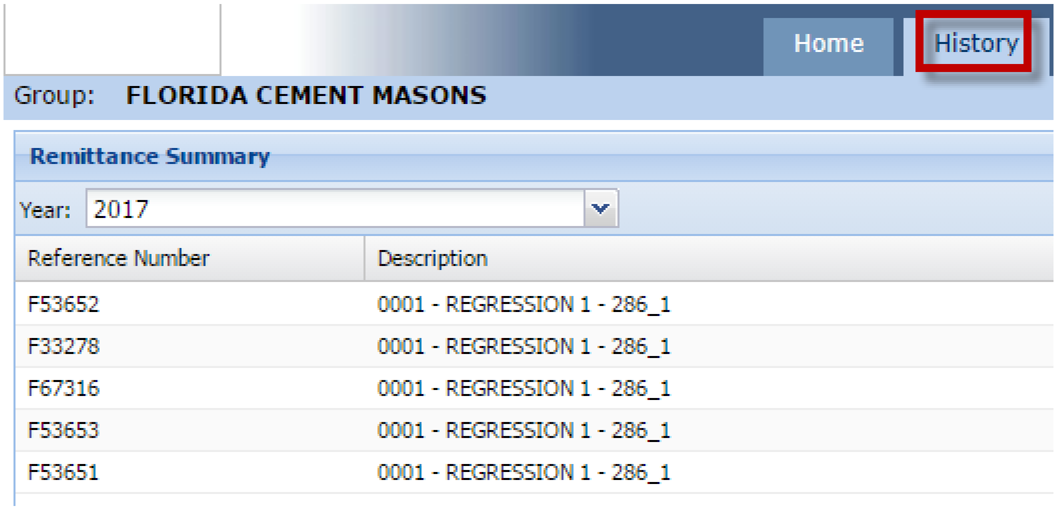
Remittance Receipt

Employer Code:	128600000	*Reference Number:*	F63458
Employer Name:	REGRESSION COMPANY	*Agreement:*	286SHIFT
Remitter Override:	REGRESSION COMPANY	*Contract:*	286SHIFT
Scheduled Date:	N/A	*Due Date:*	7/15/2016
Payroll Dates:	6/1/2016 - 6/30/2016	*Report Period:*	201606
Payment Method:	EFT-****3567	*Payment Date:*	3/31/2017
Check #:	N/A		
Grand Total:	$0.00	*User Name:*	REGRESSION1
		Contact Name:	COURTNEY JOHANNSSON

Fund	Amount Due	Damage Due	Total Due	Amount Paid
ANN-FND	0.00	0.00	0.00	0.00
Total:	**$0.00**	**$0.00**	**$0.00**	**$0.00**

History

When you select **History** , the following screen displays (example).



From the **History** tab screen, you can

- View and print a receipt of a selected historical remittance
- Access an Excel listing of employees associated with a selected remittance
- Access submitted remittances history

View and print a remittance receipt

1. From the **History** tab, use the **Year** dropdown menu to select the year associated with the remittance that you want to view.
2. Select the desired processed remittance from the **Remittance Summary** table. ***Note***: After you select a remittance, the **Remittance Details** table at the bottom of the screen is populated with information pertaining to that remittance.
3. Click **Receipt** .
4. Double-click the PDF receipt file at the bottom left of the screen, and the following receipt displays (example).

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Remittance Receipt

Employer Code:	128600000	*Reference N*
Employer Name:	REGRESSION COMPANY	*Agreement:*
Remitter Override:	REGRESSION COMPANY	*Contract:*
Scheduled Date:	N/A	*Due Date:*
Payroll Dates:	7/1/2016 - 7/31/2016	*Report Perio*
Payment Method:	Check	*Payment Da*
Check #:	EFT	
Grand Total:	$0.00	*User Name:*
		Contact Nam

Fund	Amount Due	Damage Due	Tota
ANN-FND	0.00	0.00	
Total:	**$0.00**	**$0.00**	

Access an Excel listing of employees associated with a selected remittance

1. Select the **History** tab.
2. Select the desired remittance from the **Remittance Summary** table.
3. Click **Employees**.
4. Click **Open**.

   An Excel spreadsheet displays for you to view, save, or print. ***Note***: You must have Excel installed on your machine to access the spreadsheet.

Employer Profile

When you select **Employer Profile**, the **Employer Contacts** screen displays (example). ***Note***: You must be an administrator for this tab to display.

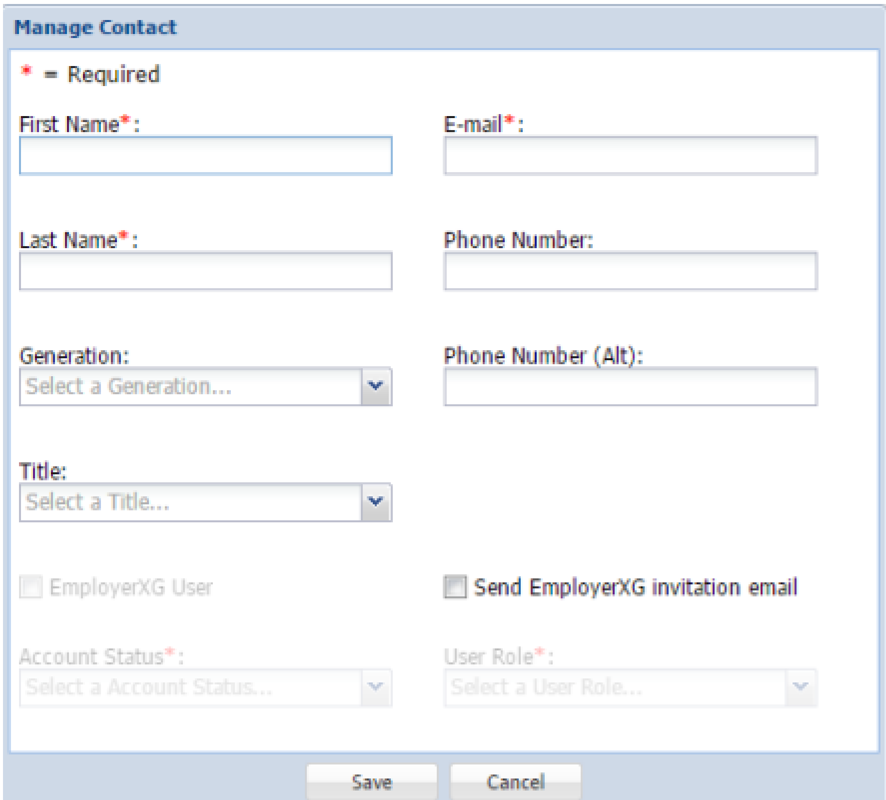
From the **Employer Profile** tab screen, you can

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

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. Select the **Employer Profile** tab.
2. Click **Add** and the **Manage Contact** popup displays.



3. At a minimum, enter information into the required fields: **First Name**, **Last Name**, and **E-mail**. ***Important***: If you select the **Send EmployerXG invitation email** checkbox, 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 it includes expires after 24 hours. If they do not use the link before it expires, you will have to send another Invitation email.

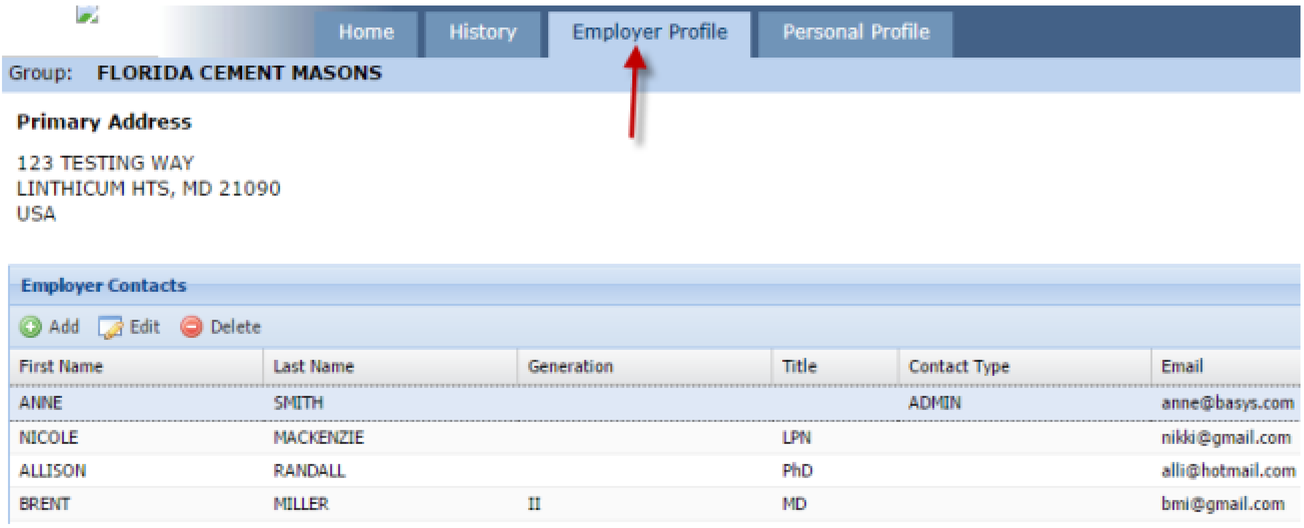
   Also, after selecting the **Send EmployerXG invitation email** checkbox, the **User Role** field will become enabled. Use the User Role dropdown menu to select the appropriate role for the contact.

4. Click **Save**.

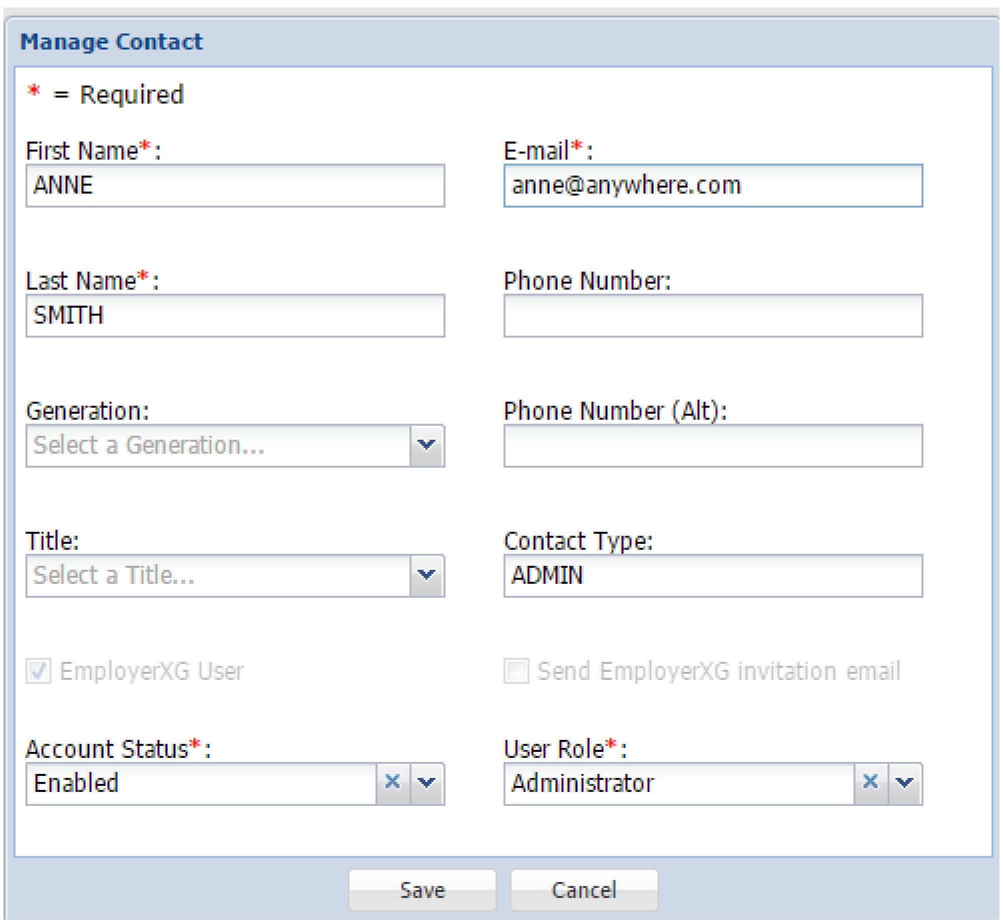
Edit employer contact information

Note: You must have an administrator role to view the Employer Profile screen, add contacts and assign a specific user role to the contacts, and to change the account status.

1. Select the **Employer Profile** tab and the **Employer Contacts** screen displays (example).



2. Select the contact whose information you want to edit.
3. Click **Edit** and the Manage Contact screen displays (example).

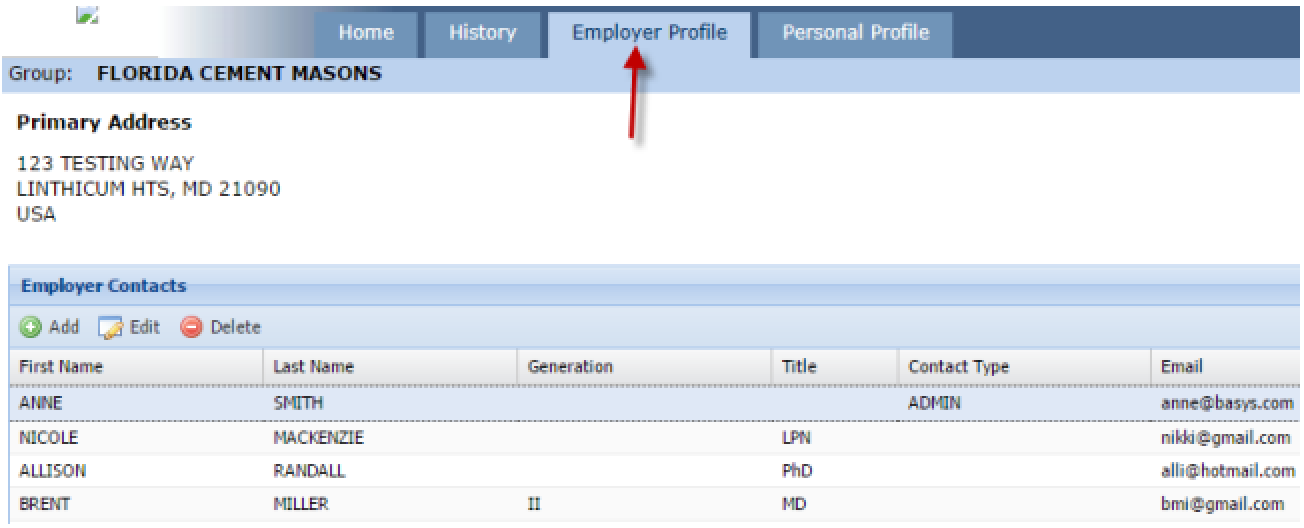


4. On the **Manage Contact** screen, update contact information as necessary and click **Save**.
5. Click **OK**.

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 and the **Employer Contacts** screen displays (example).

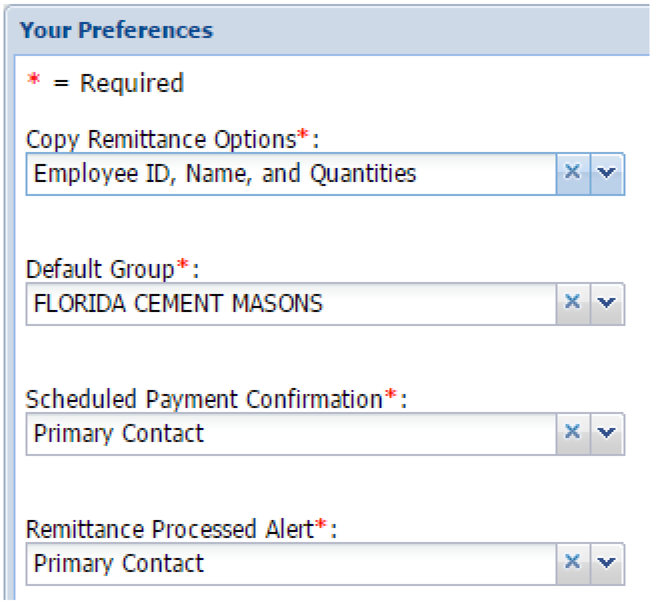


2. Select the contact whose information you want to delete.
3. Click **Delete**.

4. Answer "**Yes**" to the deletion message.
5. Click **OK** in the deletion confirmation message popup.

Set your preferences

1. Select the **Employer Profile** tab.
2. Click the **Your Preferences** link and the **Your Preferences** popup displays.



3. Use the **Copy Remittance Options** field's dropdown menu to choose what displays when you copy a remittance.

Add, update, and delete bank information

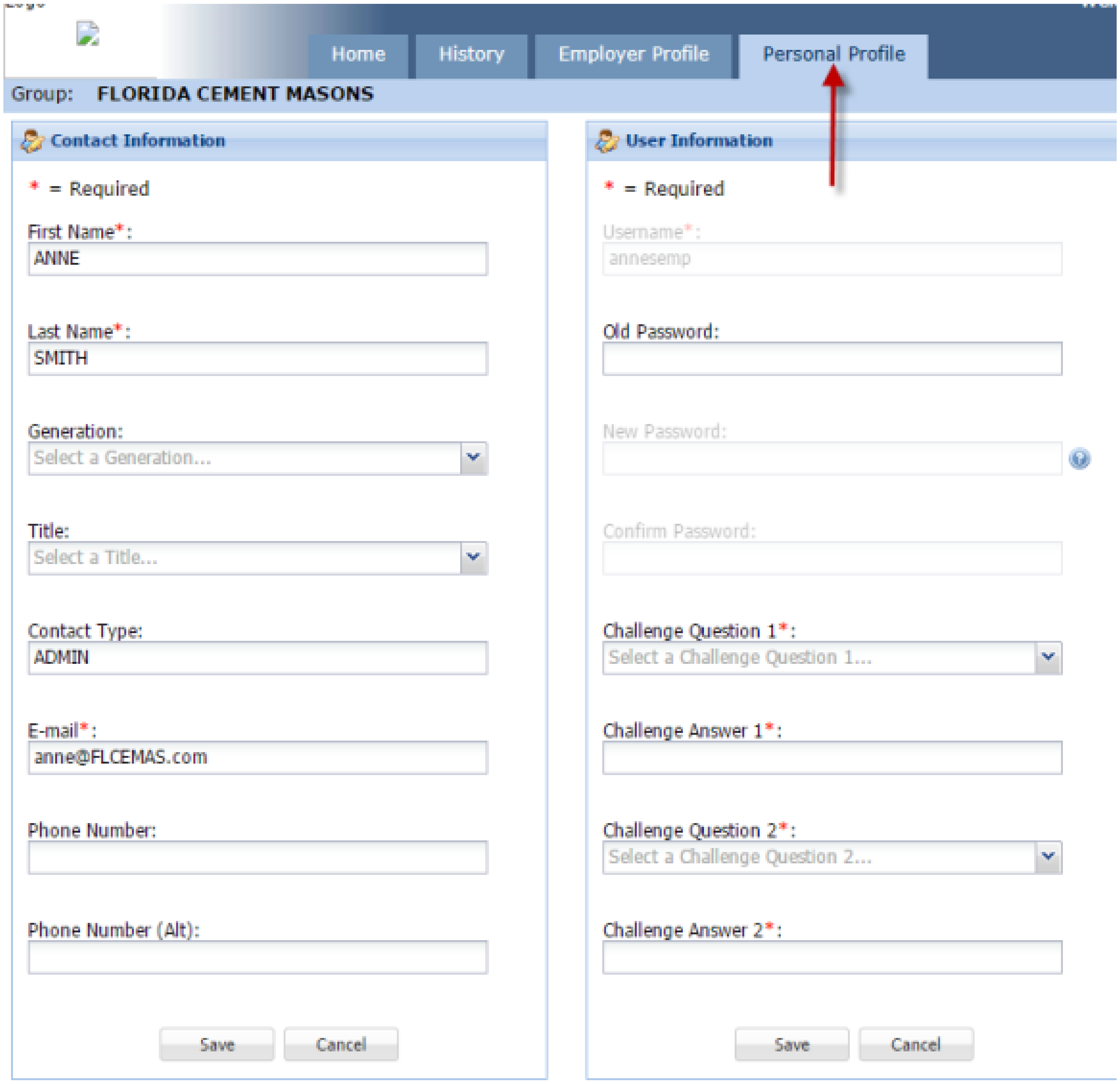
Note: You must have bank permissions to add, update, and delete bank information. Also, if only a check payment if configured for your company, you may not be able to perform these actions.

1. Select the **Employer Profile** tab.
2. Click the **Your Bank Account** link at the top right of the screen.

3. All fields except **Disable Account** are required. Add, update, or delete the appropriate information and click **Save**.

Personal Profile

When you select **Personal Profile** , the **Contact Information** screen displays (see following example).



From the **Personal Profile** tab, you can

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