Employer Self Service (ESS)

Come Report with Us…

Employer Self Service - ESS

Thank you for reading this training material regarding ESS, our new electronic method for reporting via the internet.

This training material is intended to provide Employers with specific guidelines on how to report via our website: www.local4funds.org

Any questions about the training can be directed to the Employer Reporting Help Desk at 508-533-1400 x100, or send an e-mail to:

Office@local4funds.org

Complete this material

It is to the Employer’s advantage to review this training material. There is a lot of material to cover to ensure that each Employer understands the reporting process as it relates to the ESS Application.

How to get started…

It’s as easy as 1•2•3

1. Type in: www.local4funds.org from your web browser and select the “Employer” link from the homepage.

2. Request a username and password after reading this material. Please provide us with your company name and contact information.

3. From the Employer page select “ESS” to proceed with reporting electronically.

Employer Reporting Help Desk 508-533-1400 x 100

Electronic Reporting!

Phase 1

Employers that currently submit standard reports will be the first to report via the web.

Standard reports are generated by the Benefit Funds Office and are mailed to the Employer. Employers then fill out the report and remit back to the Funds Office.

Employers who utilize a third party payroll system will be able to key into the ESS application. However, any Employer in need of electronic file submission will be considered a “Phase 2 Employer,” (see below).

Phase 2

Employers that are currently using a third party payroll system, such as ADP and the like, and would need to transmit a file electronically will be allowed to report only after working with the Local 4 Benefit Funds IT Department on the proper specifications.

Payments to the Benefit Funds Office

- Upon completion and submission of an ESS Report, Employers will need to mail a check to the Benefit Funds Office, noting the account number and reporting month on the check.

- The Benefit Funds are currently working on EFT (Electronic Funds Transfer) of payments. However, until this process is operational, all payments will need to be mailed to Medway.

NO MORE REPORTS

JUST MAIL THE CHECK

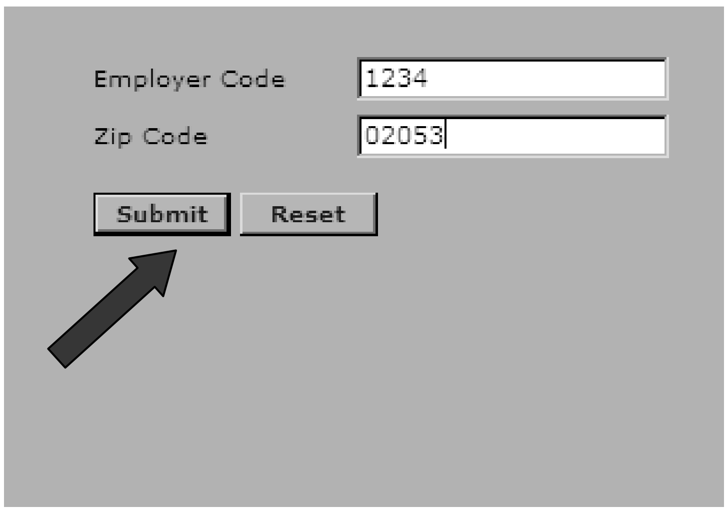
Register your Username and Password

Username = Employer Account Number

Zip Code = Your Employer Zip Code

These two steps will confirm the Employer Account.

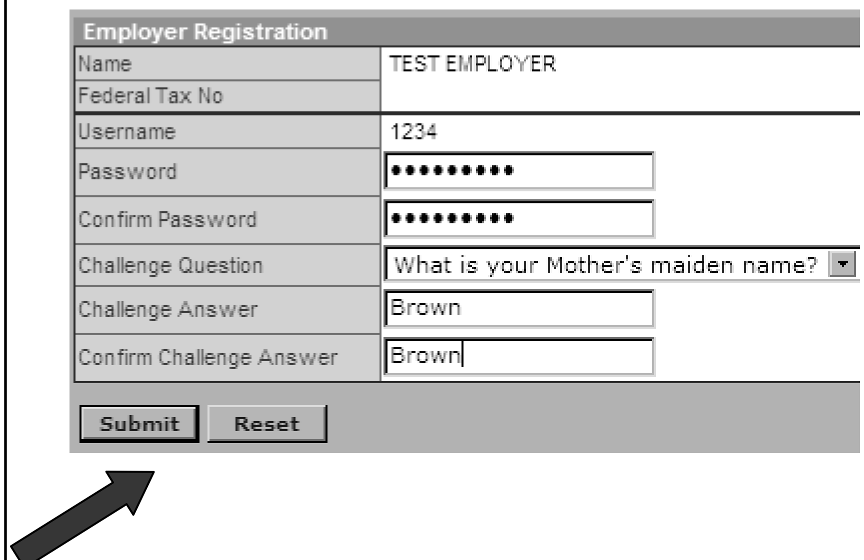
Submit this information to start the creation of a Username and Password to report via ESS.



Username = Employer Account Number

Password = Choose 6-10 Characters

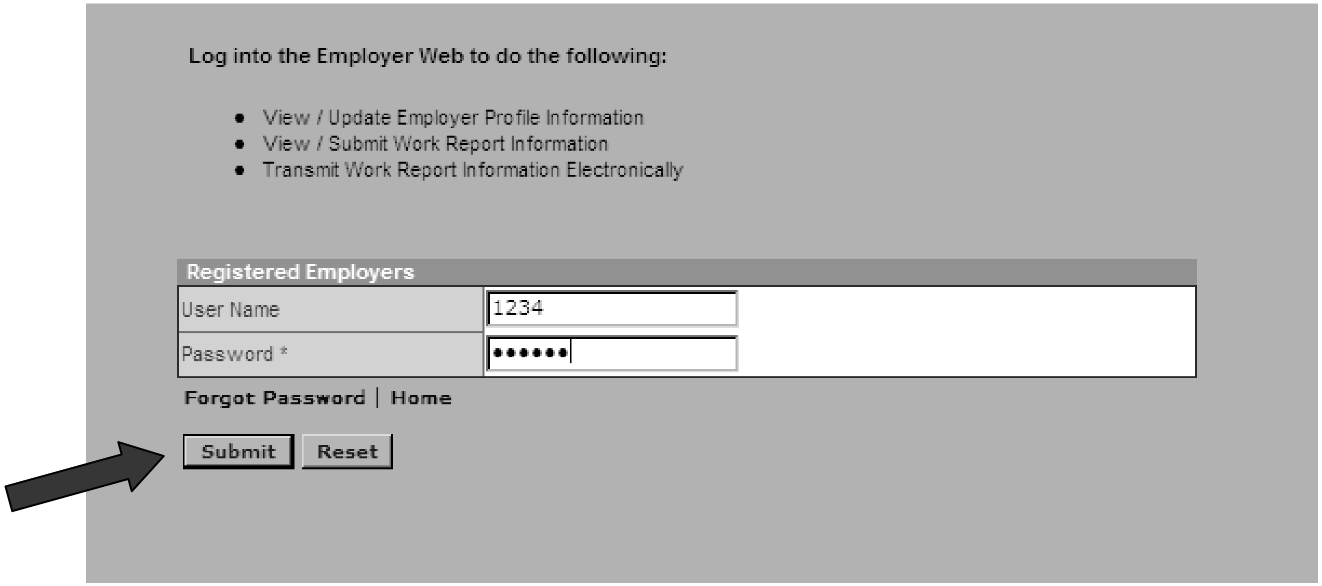
Select a challenging question and remember the answer!



Resetting a lost password will be discussed later in this session.

Login to ESS

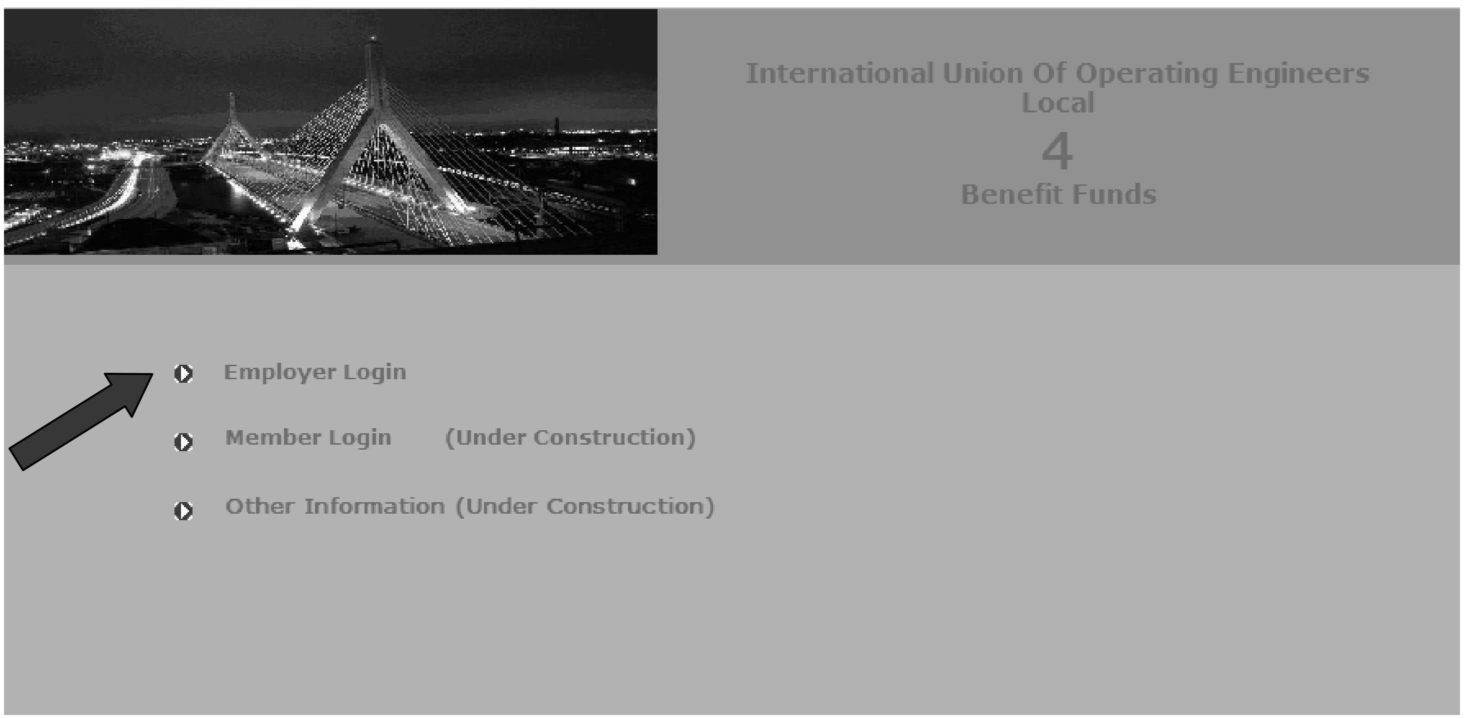
Login to the ESS Application with the user name and password. Select the “Submit” button to proceed.



ESS Home Page

This screen will display upon clicking on step 3 from the Employer page on the Benefit Funds' website. However, on the initial login the screen below does not display but will go directly into the application.

Select "Employer Login"

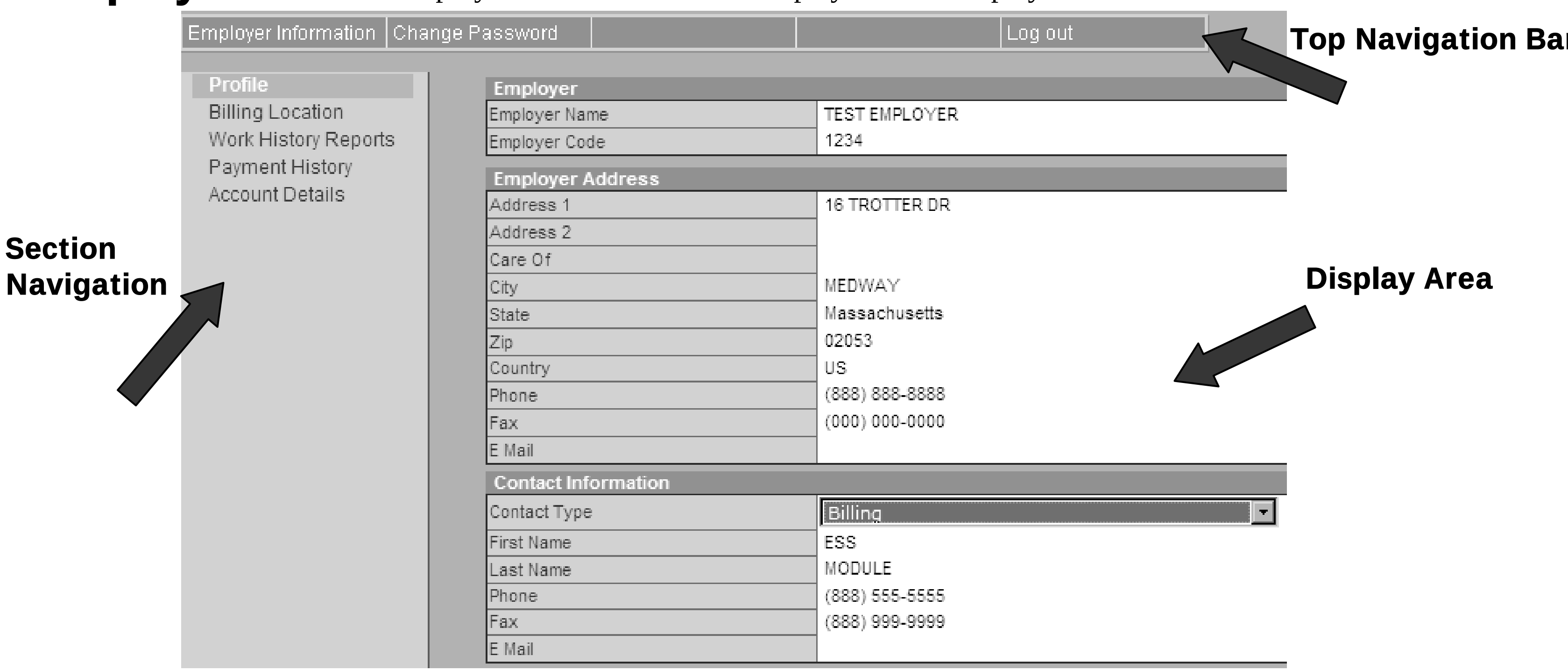


The Application Layout

Top Navigation bar – Employer Information, Change Password and Logout. Employer Information will display the screen seen below at any time in the application; Change Password allows a password change, and Logout navigates Employers to the Benefit Funds Office website.

Section Navigation – There are five features to the ESS application: Profile, Billing Location, Work History Reports, Payment History and Account Details. Each of these features will be discussed in more detail during this session. Each feature listed on the Section Navigation bar can be selected multiple times to navigate this application. It is strongly recommend to use the Section Navigation tool rather than the browser **forward** and **back** buttons as the browser buttons may disconnect the ESS Application session.

Display Area – All employer information will be displayed in the display area.

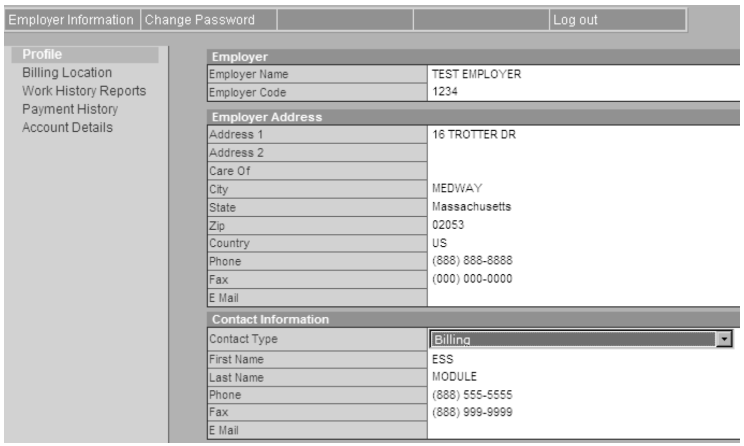


Top Navigation Bar

Three main choices:

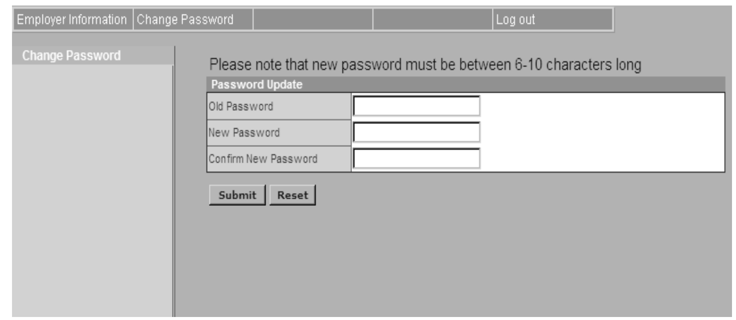
1. Employer Information

Displays information regarding the Employer



2. Change Password

Allows the Employer to change their password



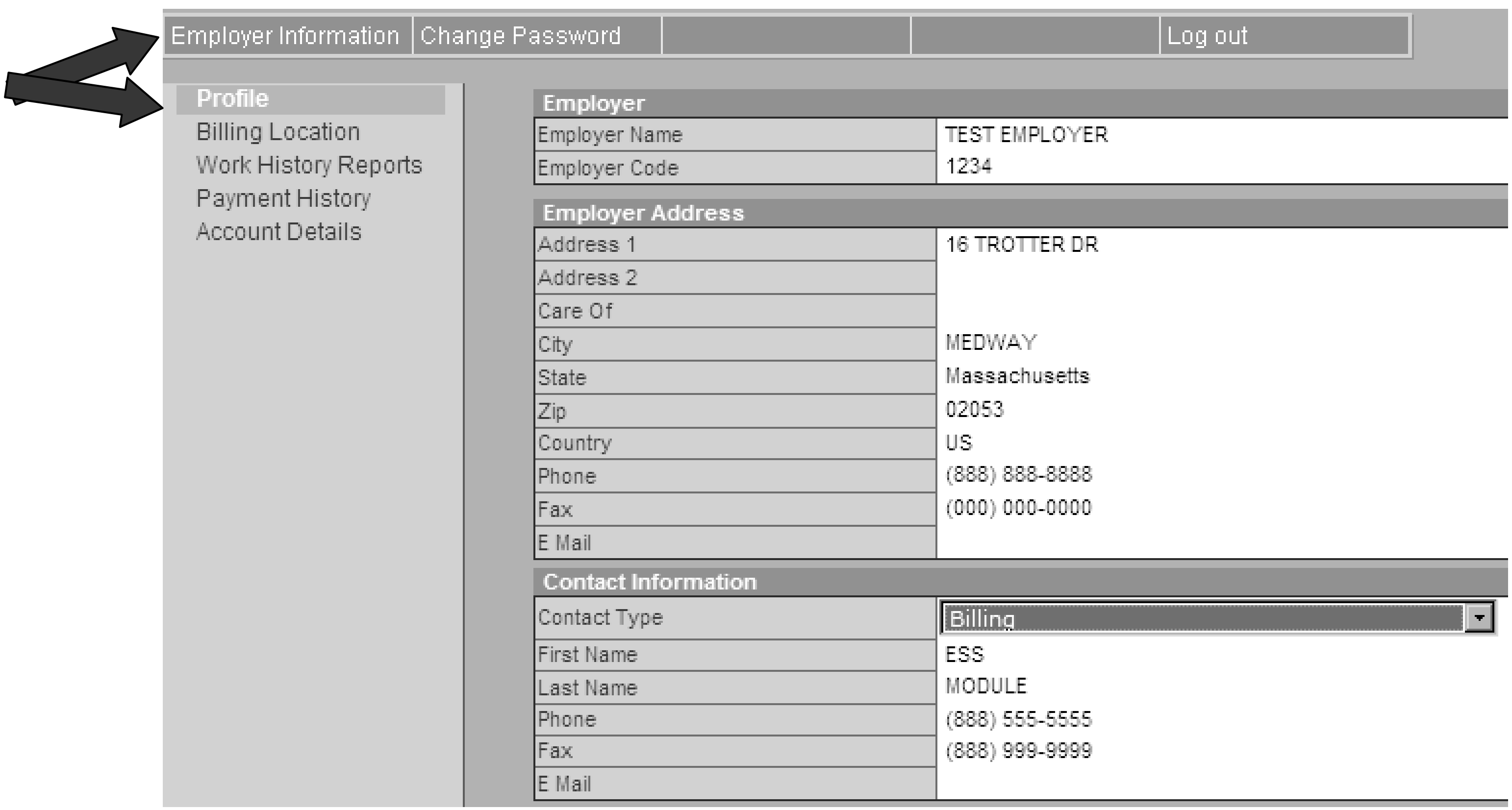
3. Logout

Allows Employer to logout of the ESS application, returning to the Benefit Funds Office Employer web page

Any questions can be directed to the Employer Reporting Help Desk at 508-533-1400 x100.

1. Employer Information

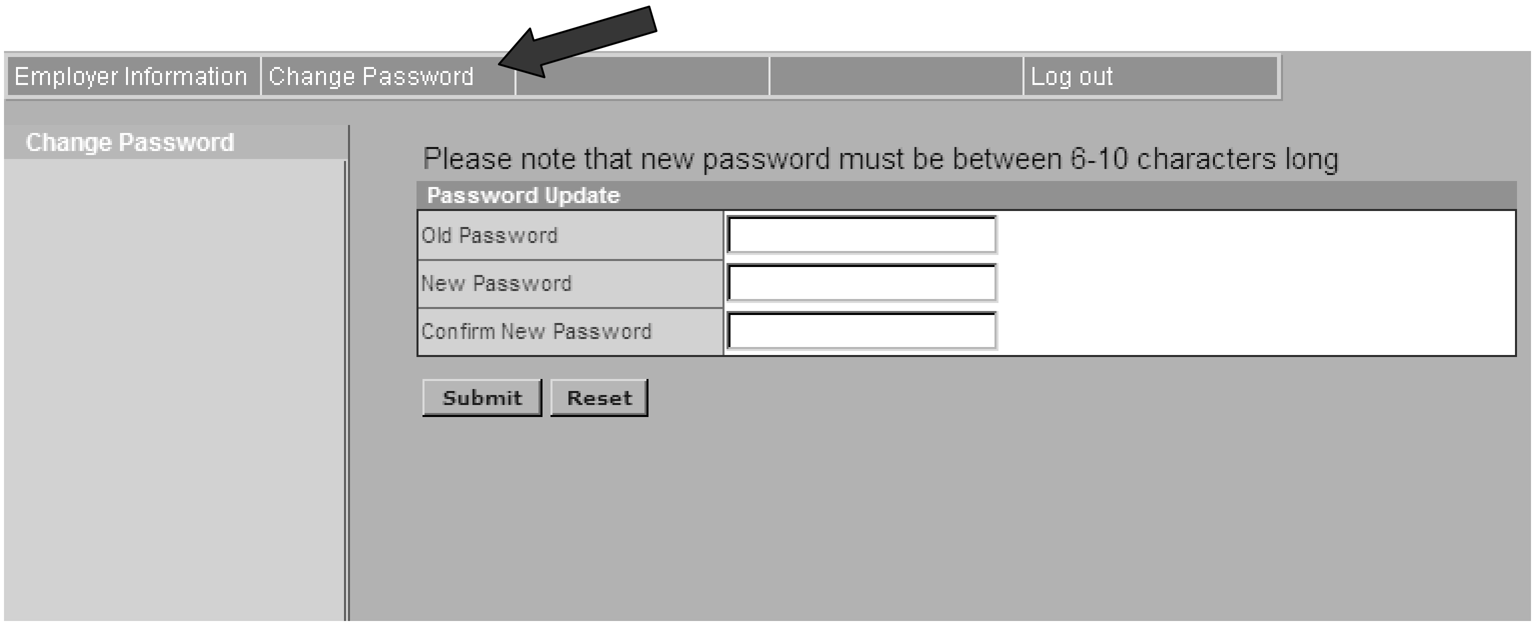
Displays information regarding the Employer. This information can be found in the Profile view of the Section Navigation, and the Employer Information of the Top Navigation View.



2. Change Password

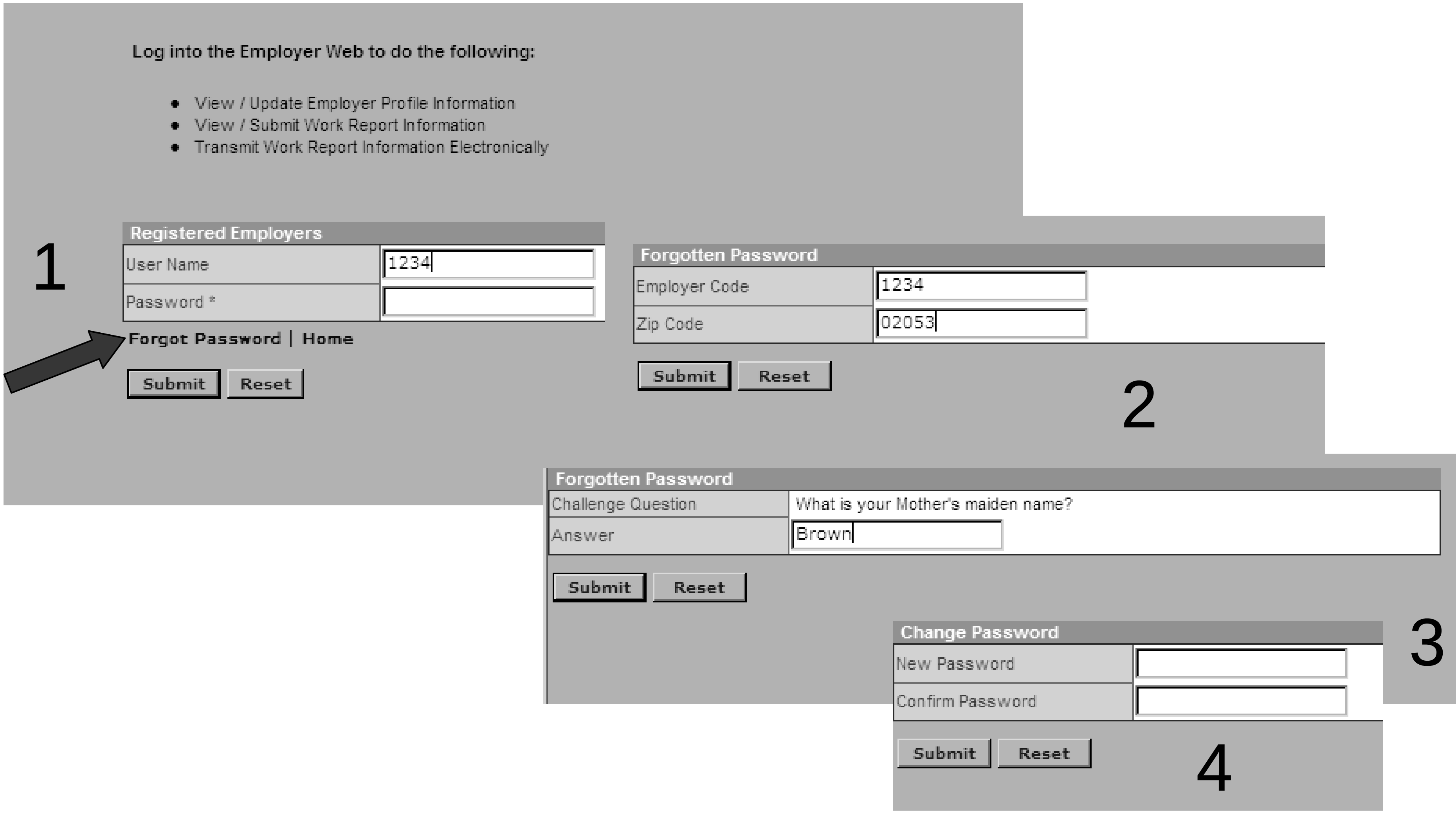
Allows the Employer to change their password.

At any time the password can be changed by selecting “Change Password” on the Top Navigation Bar while in the ESS Application.



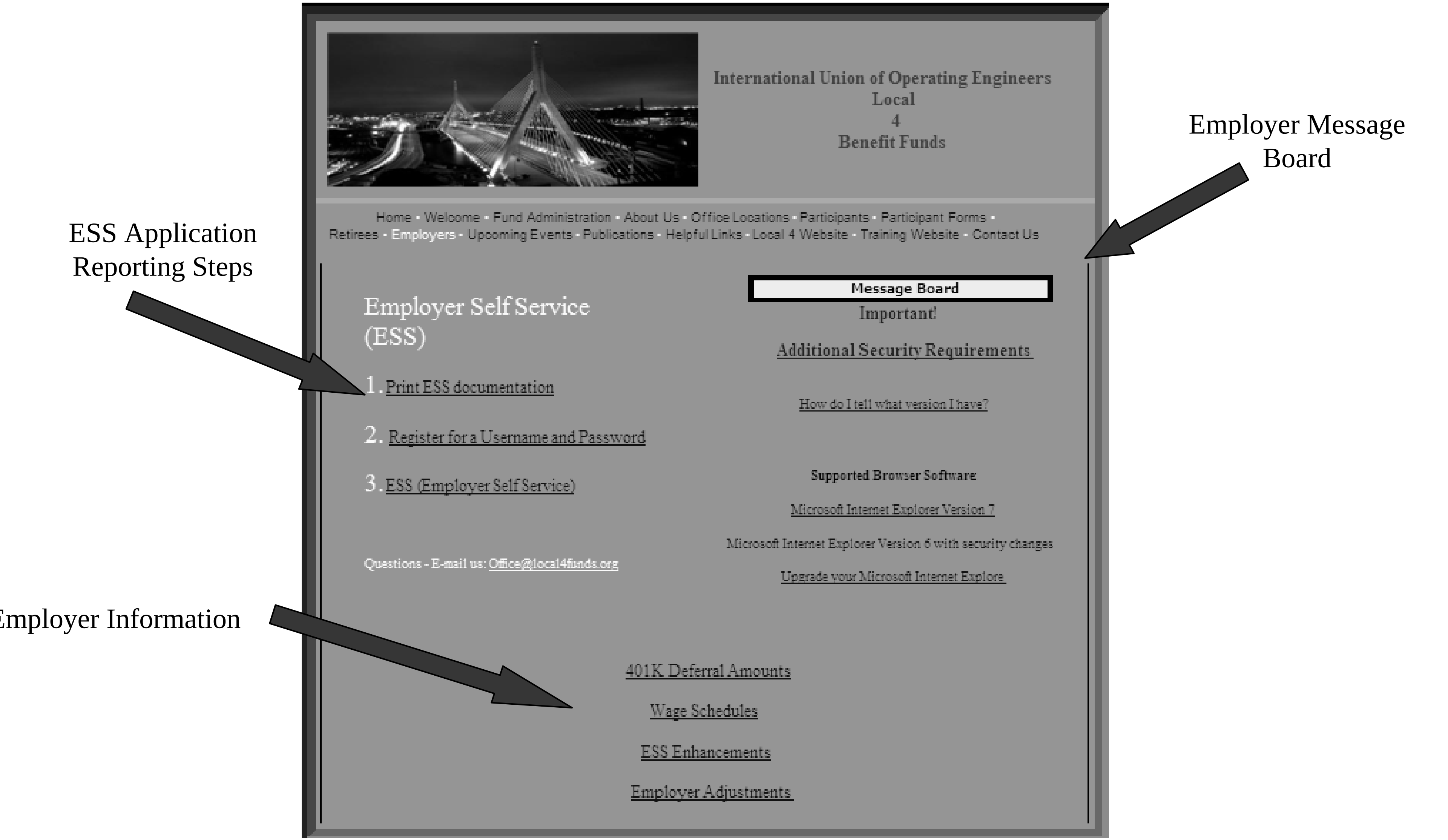
Password forgotten?

The employer code and zip code are required to reset any password.
Please keep in mind that the passwords are **confidential** and should not be given out.



3. Logout

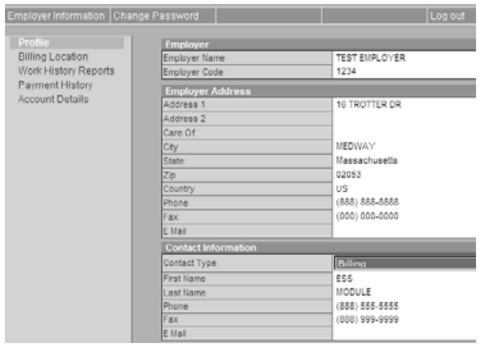
Logout from the Top Navigation bar will complete the current ESS application session and will automatically navigate to the Employer page of the Benefit Funds' site.



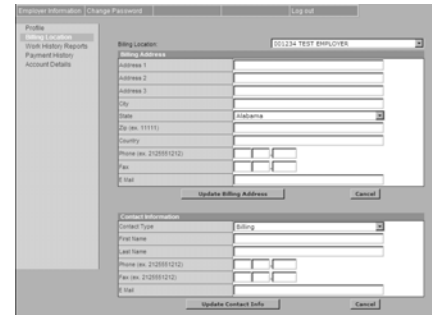
Section Navigation Bar

Five main features from the Section Navigation. Each feature will be discussed in detail.

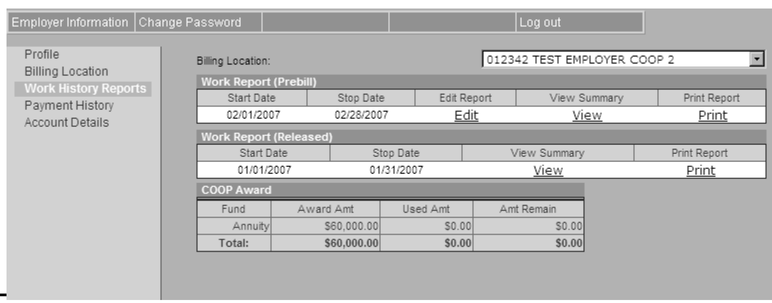
1. Profile



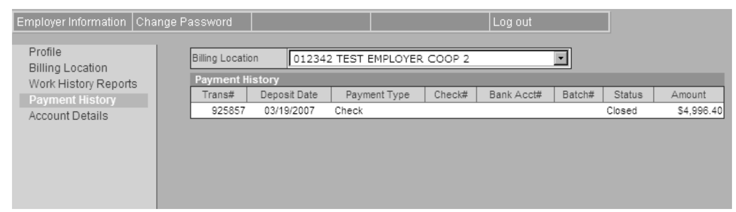
2. Billing Location



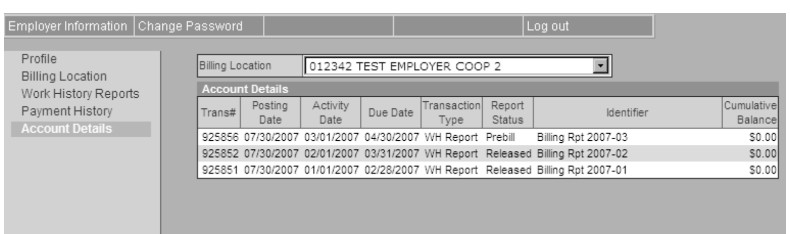
3. Work History Reports



4. Payment History



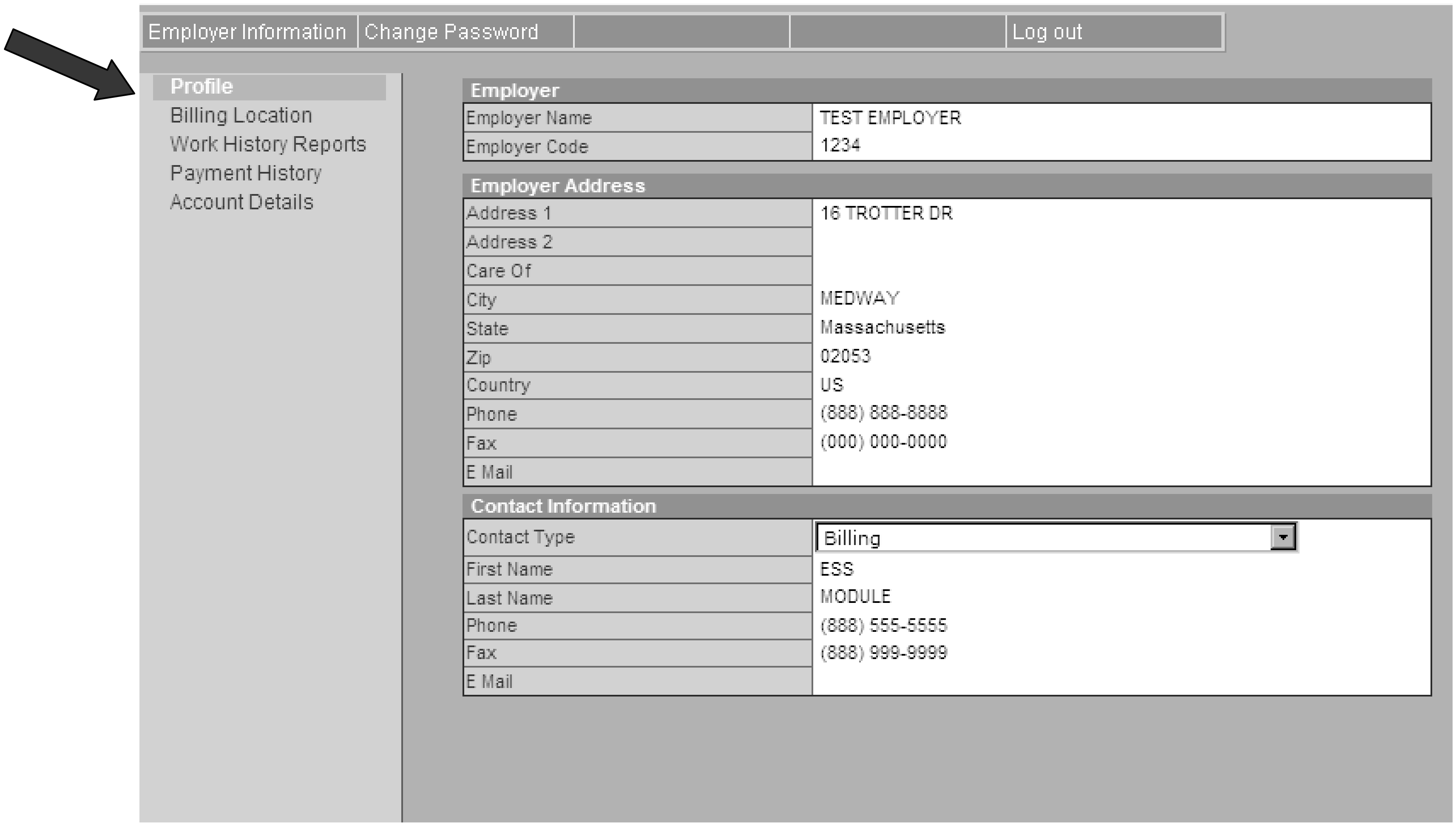
5. Account Details



Each feature will be discussed in detail. Please continue with the training.

1. Profile

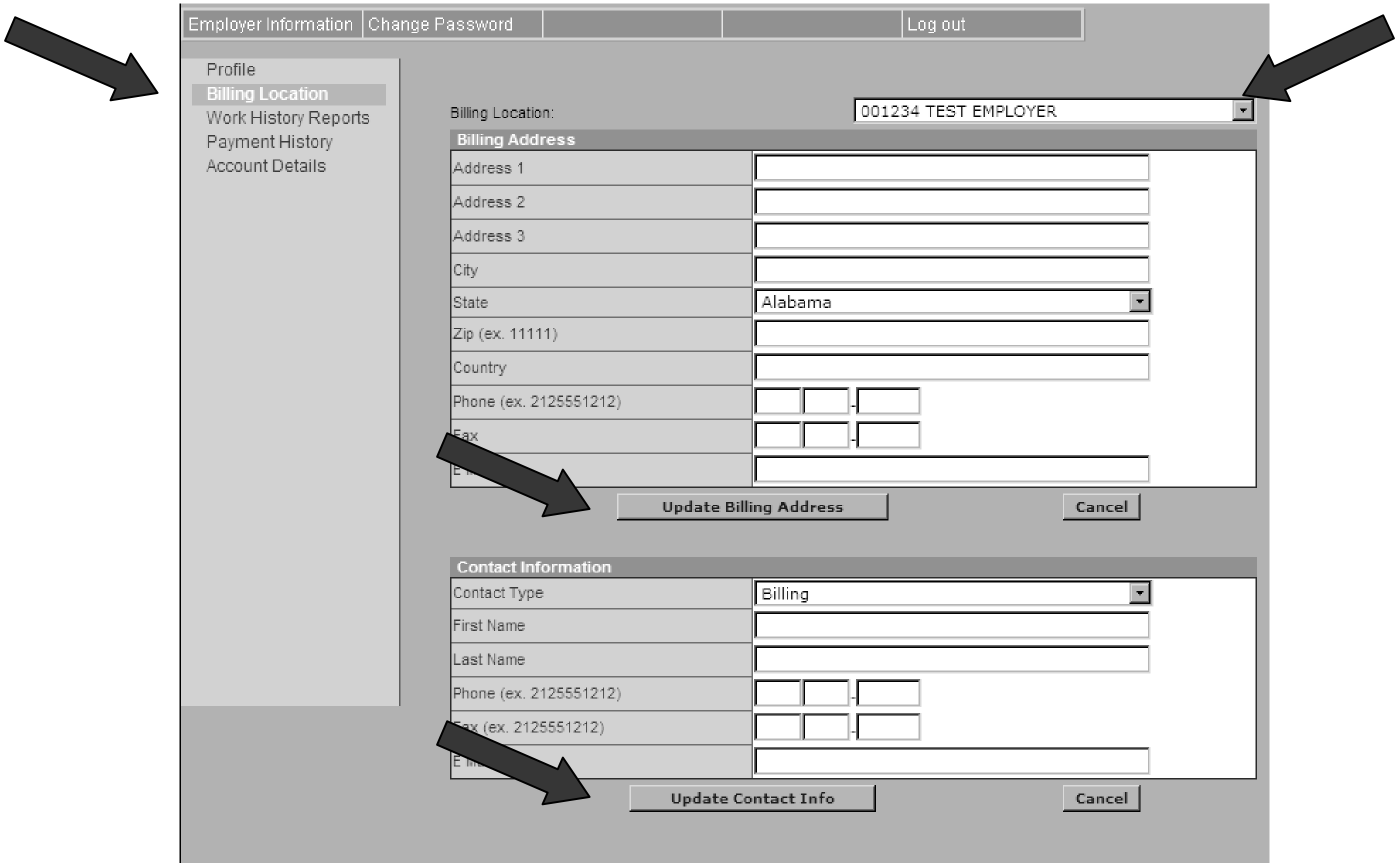
The Profile link will provide Employers with all necessary information regarding their account. <u>This screen cannot be edited via the ESS Application</u>. Please submit any changes to the profile by submitting an Employer Adjustment form. This form can be found on the Employer page on the Benefit Funds' website.



2. Billing Location

The Billing Location Screen will also display pertinent account information. Updates to this screen are possible by selecting the appropriate account number from the drop down menu and then making changes to the form.

It is important to select "Update" after making changes to the billing address and or contact information.



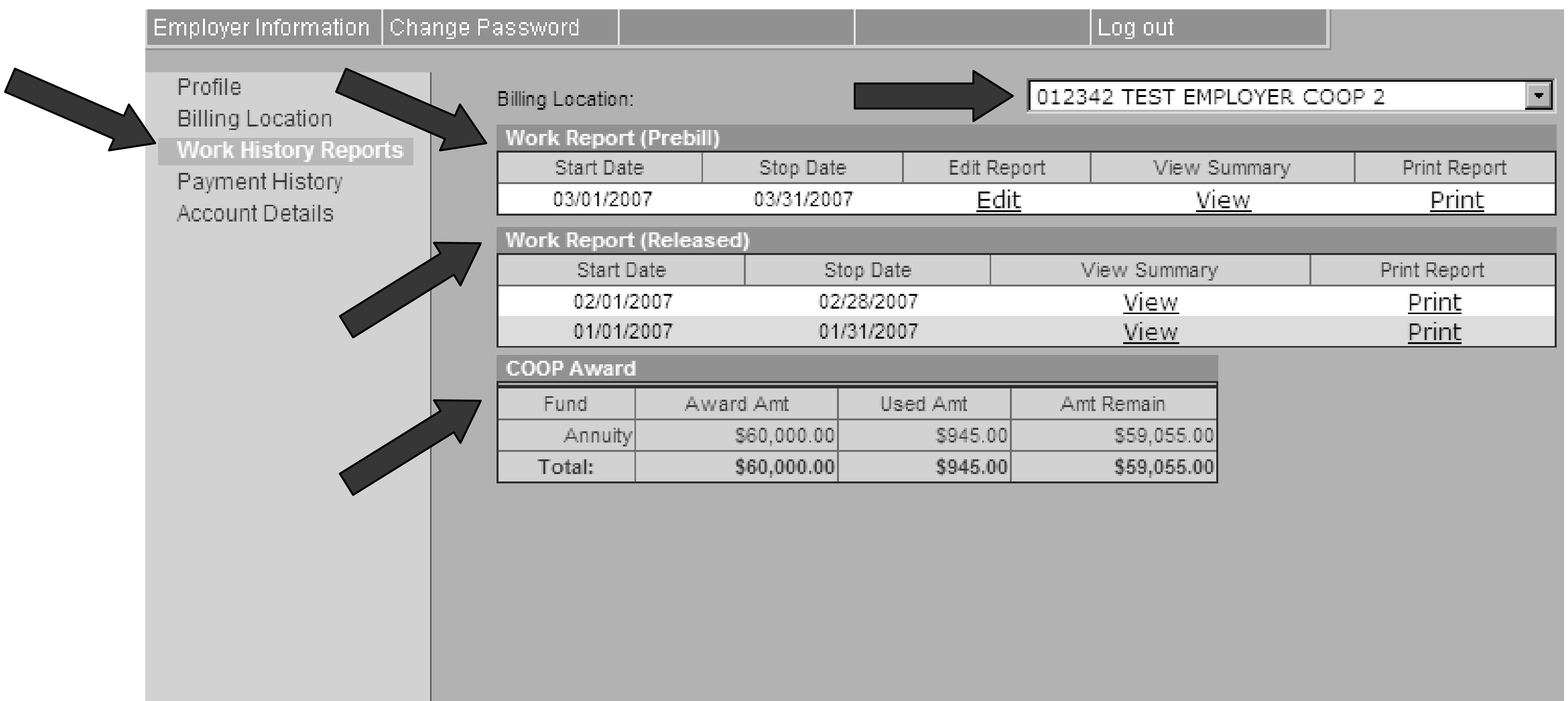
3. Work History Reports

The work history page will allow submission of reports electronically. This page has three main sections.

Work Reports (Prebill) – This section will contain the Employer's monthly reports. The reports can be viewed, edited, and printed. A prebill is the actual monthly file to be submitted to the Funds. When a prebill is submitted it will remain in the Work Report (Prebill) section until your payment is received at the Benefit Funds Office. After the Funds Office reviews the report and applies payment the report moves down to the Work Report (Released) section. A prebill for the next month will be generated and placed in the Work Report (Prebill) section. This will be the report you will use to submit your next months hours.

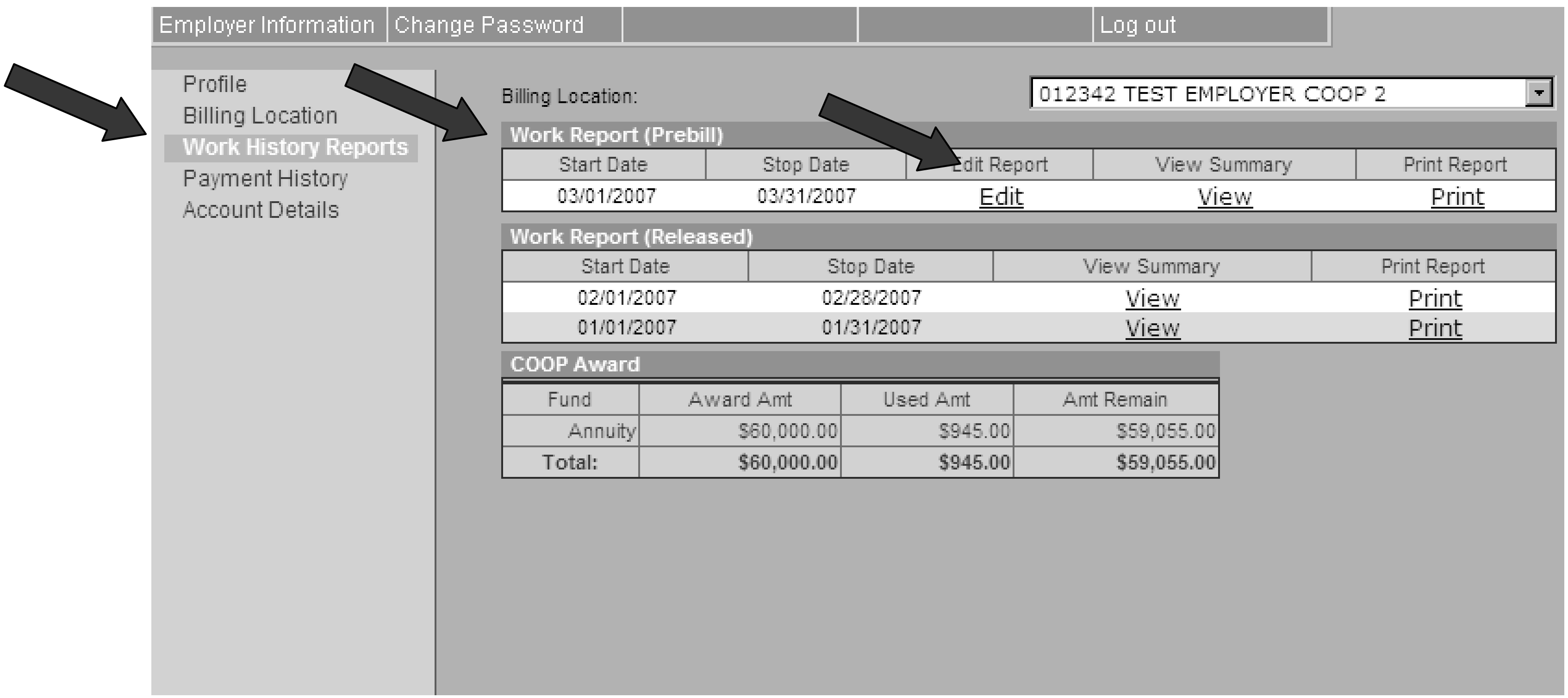
Work Reports (Released) – This is a history of reports that can be viewed and printed. **Only reports entered via the internet will display in this area.**

COOP Award breakdown – If an Employer has any COOP awards, a breakdown will be displayed at the end of the page.



4. Work Report (Prebill)

To submit a report electronically the Employer will edit the appropriate month's prebill.



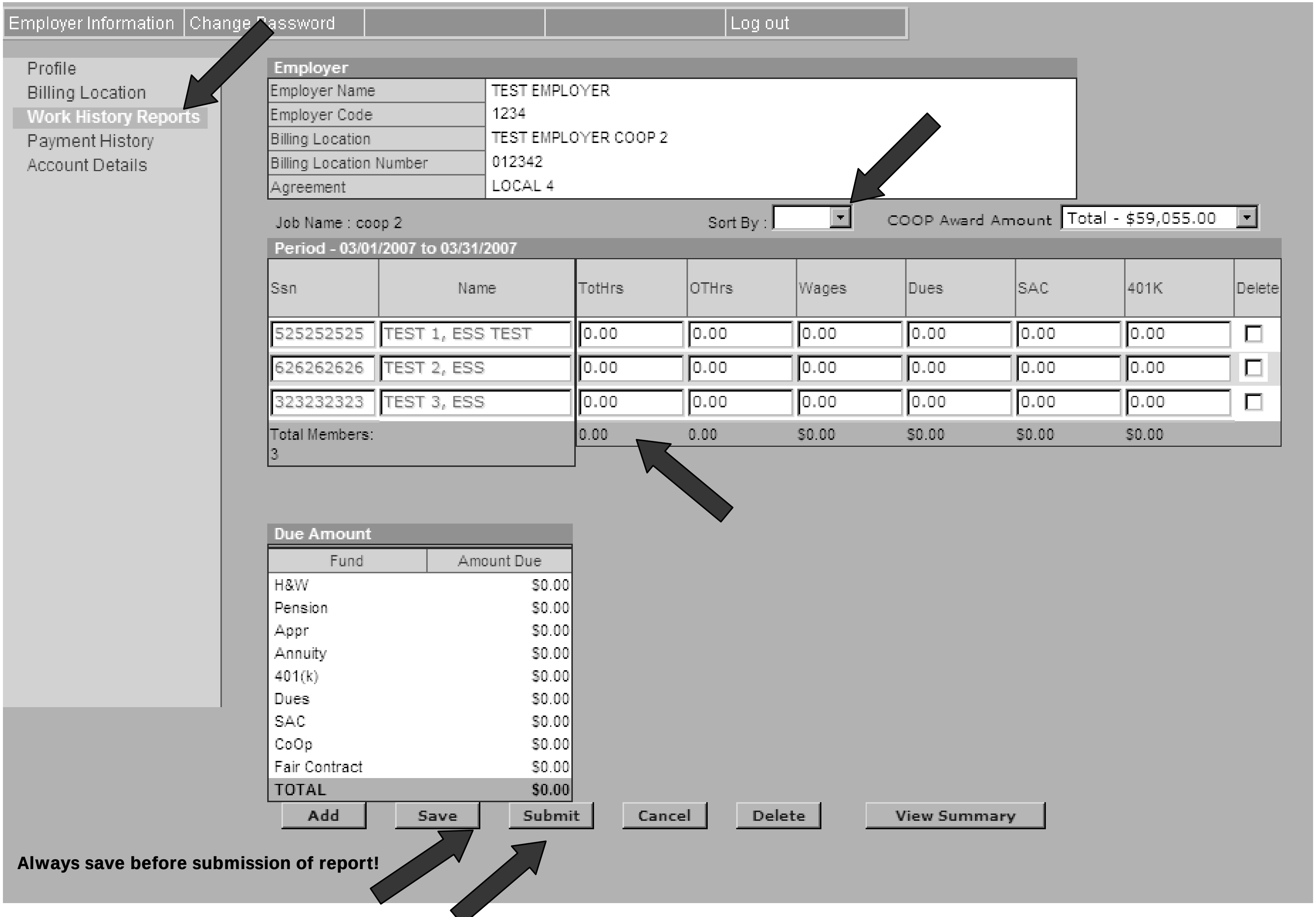
Entering data into a Prebill

(Work History Report)

For an Employer to enter data into a prebill, select to sort the roster by either Social Security Number or Name. Proceed next by keying in the TotHrs, OTHrs, Wages, Dues, Sac, and any 401K next to the employee's name. When you are done with the report select the **SAVE** button first and then **SUBMIT**. The report will be electronically sent to the Benefit Funds Office for processing. A new report will be available once we receive payment. The submitted report will move down to the released section of this screen.

PLEASE GET IN THE HABIT OF SAVING OFTEN!

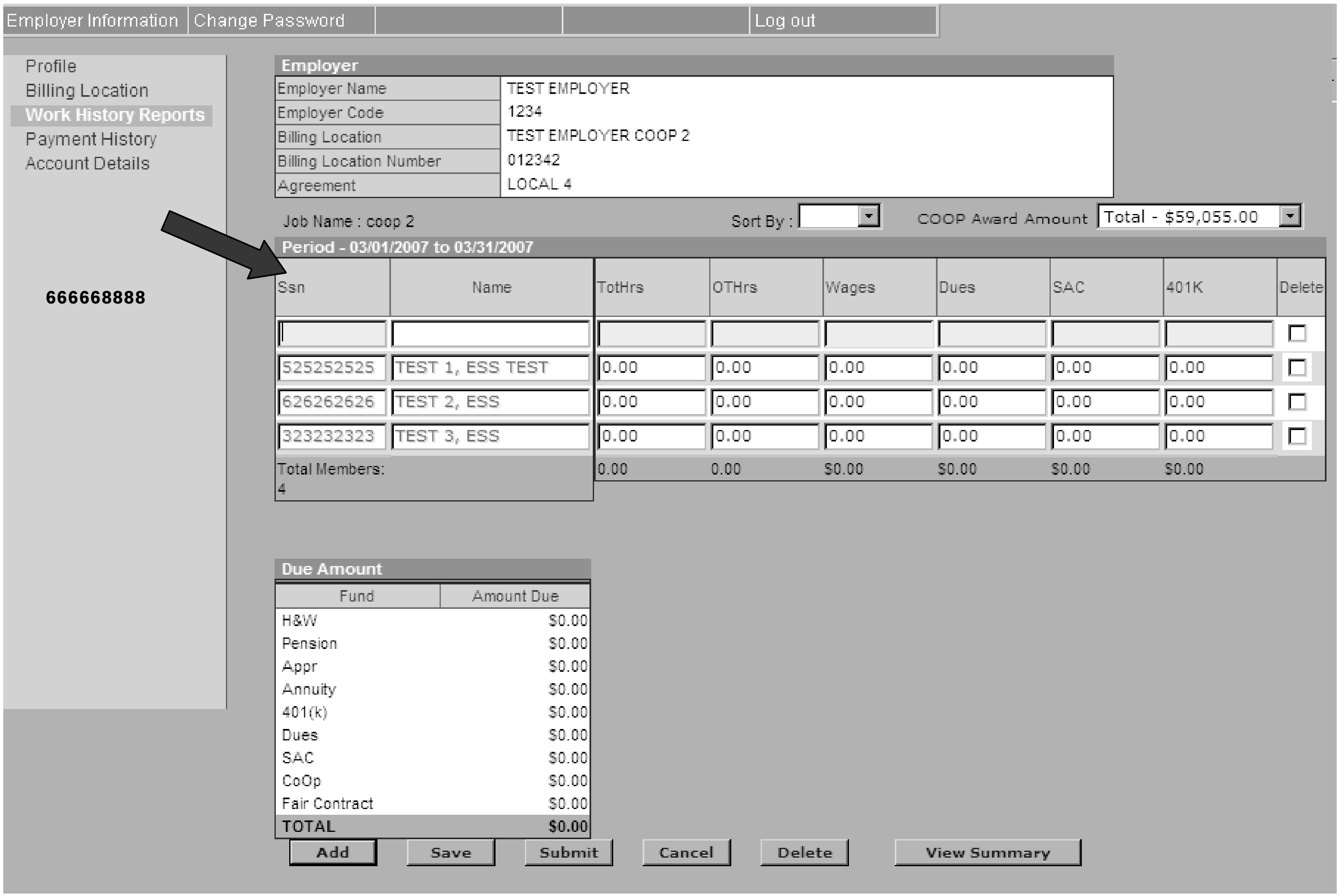
Here is a Sample Report which can be sent electronically. Notice the buttons at the bottom of the screen; please become familiar with them.



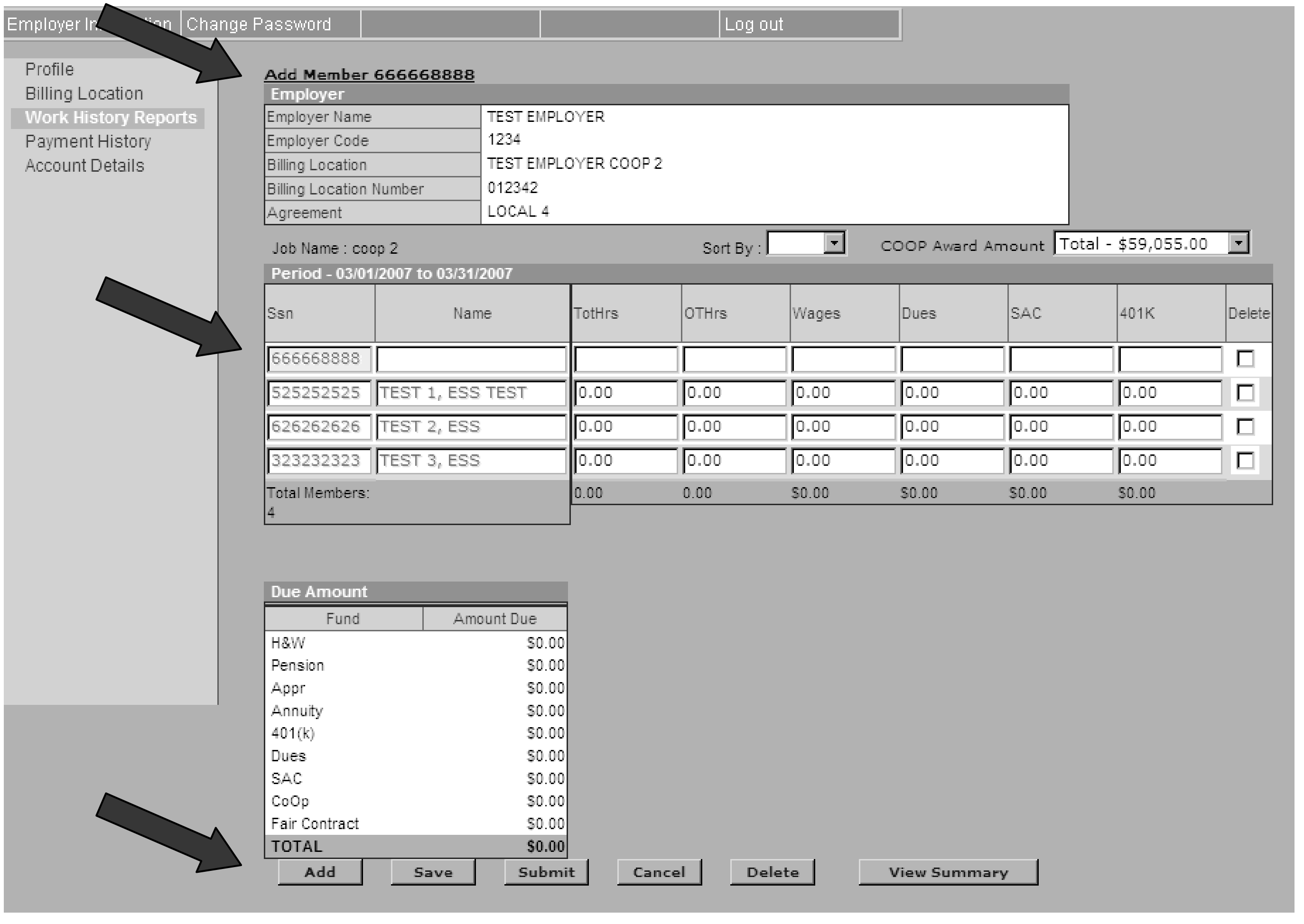
Work History Buttons

Add	Save	Submit	Cancel	Delete	View Summary
The “Add” button allows an Employer to add a new member or add an existing member to the roster.	The “Save” button will do just that: Save any work. It is recommended to utilize this tool on a continuous basis. It is always better to save than to lose! **Please note**: If the “Save” button is not selected prior to clicking “Submit,” all information will be lost. SAVE OFTEN!	The “Submit” button is used to submit a completed report to the Benefit Funds Office for processing. Again, any data keyed in must be SAVED before submission. **Please note:** If the “Save” button is not selected prior to clicking “Submit,” all information will be lost; the report will be submitted with no data. SAVE OFTEN!	The “Cancel” button will clear all information and take the Employer back to the Work History view. **Please note**: Any data that has been saved and submitted cannot be canceled. The Employer Help Desk is available for any questions: 508-533-1400 x100.	The “Delete” button can be used to delete a member who no longer belongs on the roster. Click to select a member to be deleted, then select the “Delete” button. Once again, SAVE.	The “View Summary” button will allow an Employer to view the entire report prior to final submission. Again, any data keyed in must be SAVED before submission. **Please note**: Any data that has been saved and submitted cannot be changed electronically.

Add <u>Existing</u> Member – When the “Add” button is selected, a new line for data will populate (see yellow shaded boxes). Enter the member’s Social Security Number, (no dashes). If they are an existing member, the name field will automatically display after you hit the save. Proceed with entering TotHrs, OTHrs, Wages, Dues, Sac, 401K.



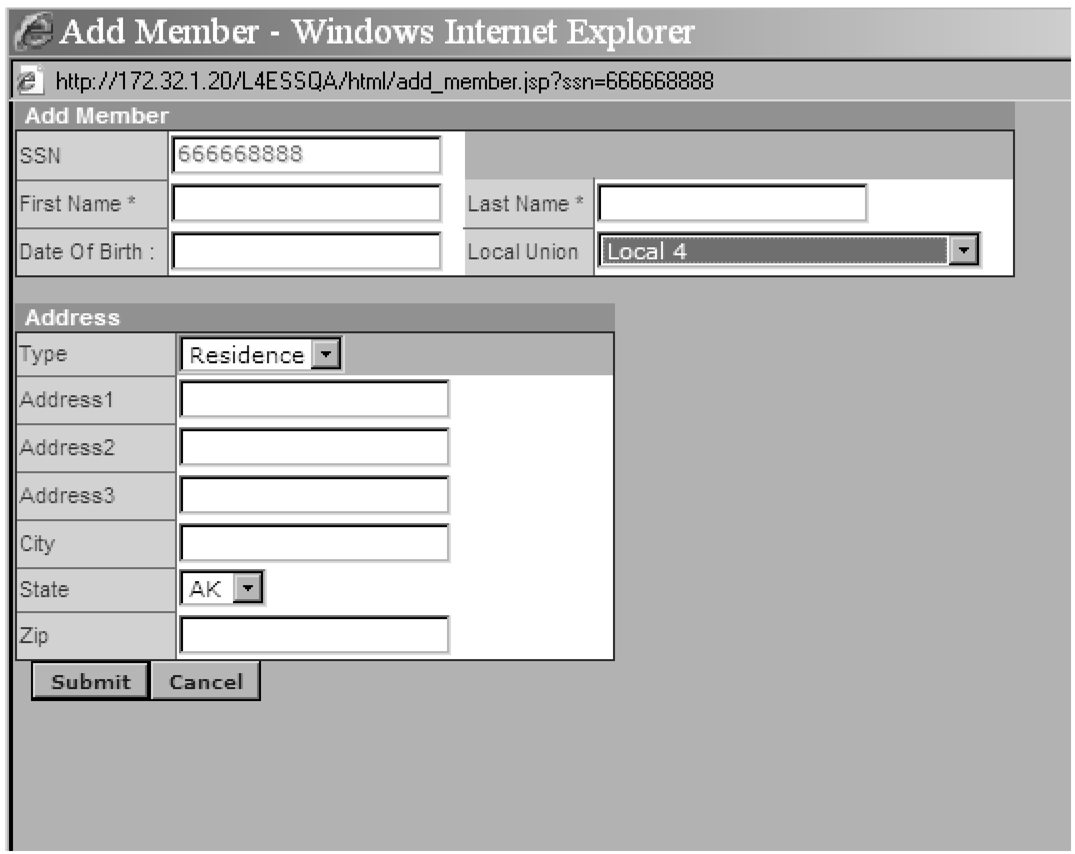
Add a <u>New</u> Member – Also select the “Add” button to enter a <u>new</u> member. The member’s Social Security Number must be keyed in followed by selecting the “Add” button again. A prompt at the top of the page will appear to add a member. Click on the “Add Member” link to bring up the new member form. Once all the data pertaining to the new member has been entered the “Submit” button must be selected. This member will now be added to future prebills.



Add a New Member (continued)

This is an example of a form that will display when adding a new member. Fill in the appropriate information and hit “Submit.” A message will display confirming the member has been added. A link will display to return to the previous screen. If the member is not added properly a message will display. Please contact the Employer Reporting Help Desk at 508-533-1400 x100 with any problems.

When adding a member be sure to key in the correct Local Union, Date of Birth and Address as they are required fields. If the member belongs to a Local other than Local 4 (Reciprocity) please inform the Benefit Funds Office by e-mail, employer adjustment form, or call.



ESS Training Tips

Save ALL work frequently

- If a report has been saved then submitted it cannot be edited.
- A saved report can be edited numerous times as long as the “Submit” button has not been selected. It is recommended to save the data frequently.
- If a keyed report is not saved but submitted, the Benefit Funds Office will receive no data!
- A saved and submitted report cannot be cancelled.
- To remove a member, click to check mark the member and then hit the “Delete” button.
- A copy of a report can be printed at any time.
- Do not use the browser forward and back buttons while in the ESS Application. Use the “Section Navigation” tools.
- Any forgotten passwords can be reset.

ESS Training Tips, continued

- Call the Employer Reporting Help Desk with any errors found on a report after submission but before a check has been mailed for contributions.

- If an error message displays while in session, do not panic. Use the "Section Navigation" tool to go back to the report.

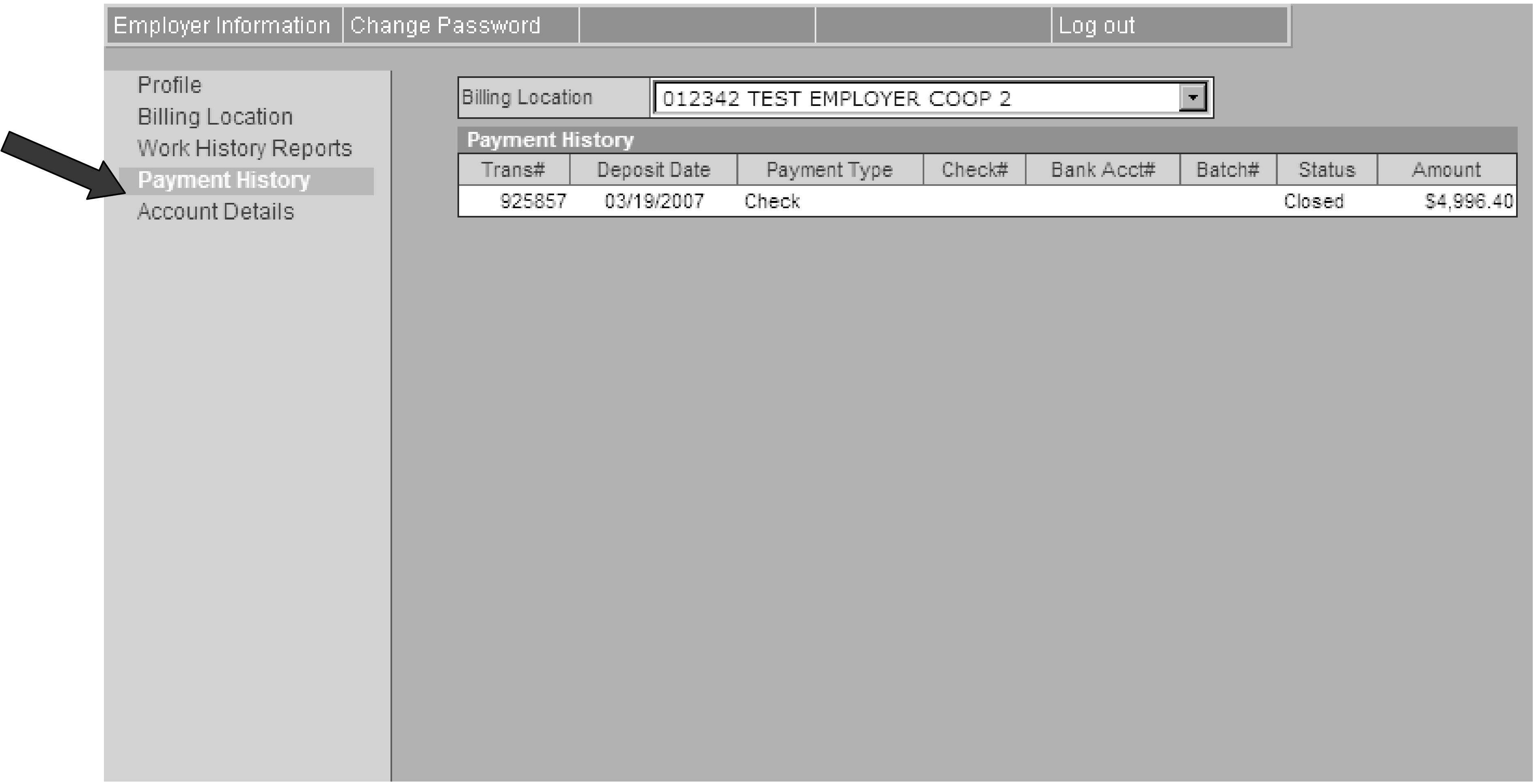
- A submitted report with blank lines cannot be processed. A report that features an employee listed with no hours will still be processed. Remove all blank lines to complete a report.

- To report any adjustments to a submission go to www.local4funds.org and click on the Employer link to print an adjustment form. These forms can be e-mailed or faxed to the Benefit Funds Office for processing.

If all else fails call the Employer Reporting Help Desk at 508-533-1400 x100

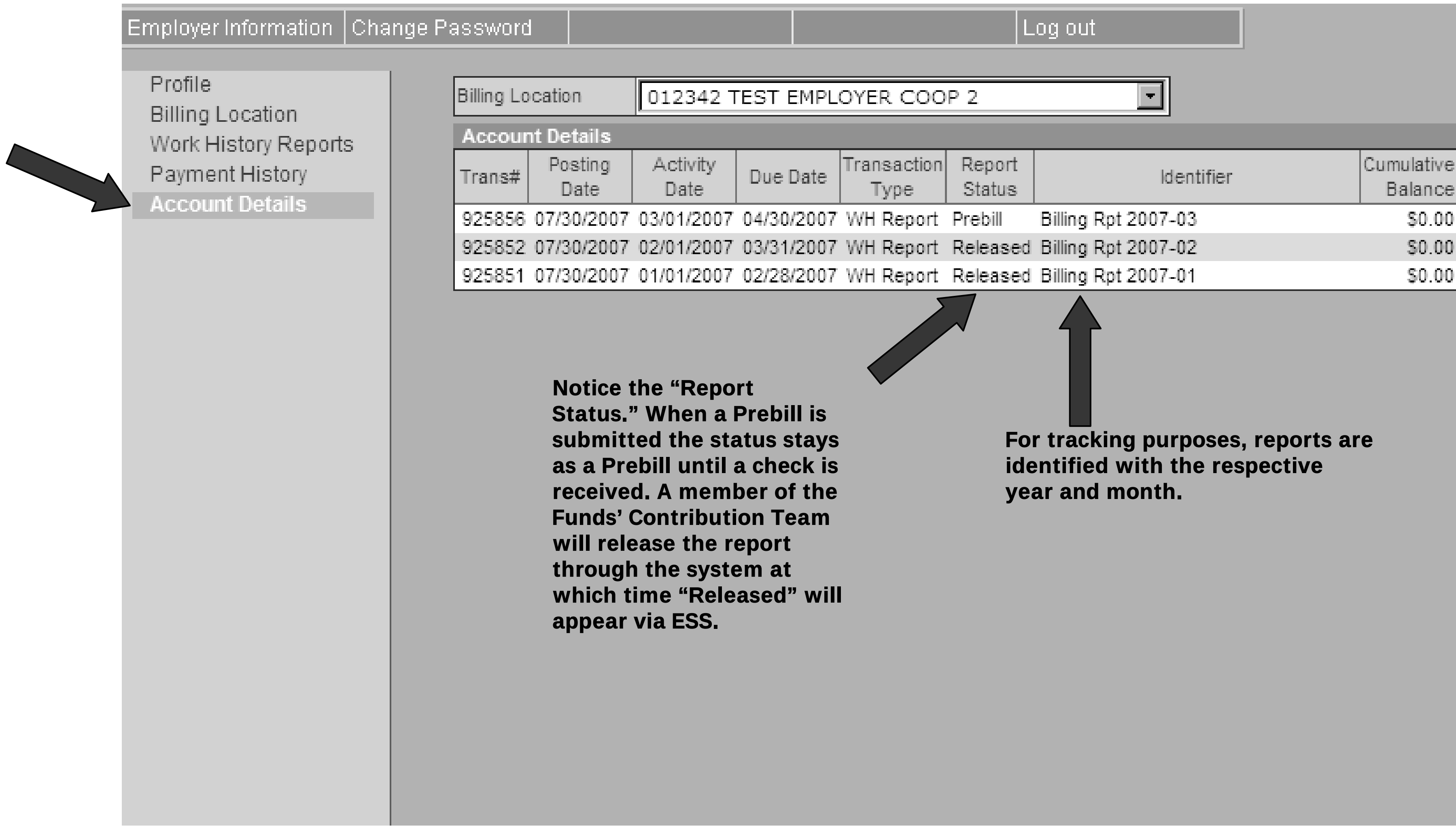
4. Payment History

The Payment History screen will display payments that have been received and processed by the Benefit Funds Office.



5. Account Detail

The Account Detail screen will display payments which have been posted along with any cumulative balance.



Notice the "Report Status." When a Prebill is submitted the status stays as a Prebill until a check is received. A member of the Funds' Contribution Team will release the report through the system at which time "Released" will appear via ESS.

For tracking purposes, reports are identified with the respective year and month.

Important information about the Co-op Award Accounts!

We have received a number of questions regarding co-operative trust accounts.

- The ESS Application will NOT deduct this amount when you enter your report.
- It can only show you the balance in the co-op funds prior to you submitting your report.
- After receipt and posting of your check by the Contribution Department co-op balances will reflect the awards taken on reports submitted via the web.
- If you are submitting multiple accounts with one check please also send us a list of what accounts (awards) are being paid and how much for each account.

Backup Plan to ESS

What happens if the website is down? Please contact the Employer Reporting Help Desk at 508-533-1400 x100 for further information regarding the availability of the ESS Application.

- If there is a long delay in getting the application operational, remittance reports may be mailed or faxed to the Benefit Funds Office.

- Any general issues navigating the internet must be resolved by the Employer's own computing staff.

Thank you for reporting electronically
with the IUOE Local 4 Benefit Funds Office!

Good Luck!