

# 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](http://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](mailto: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](http://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.

# 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

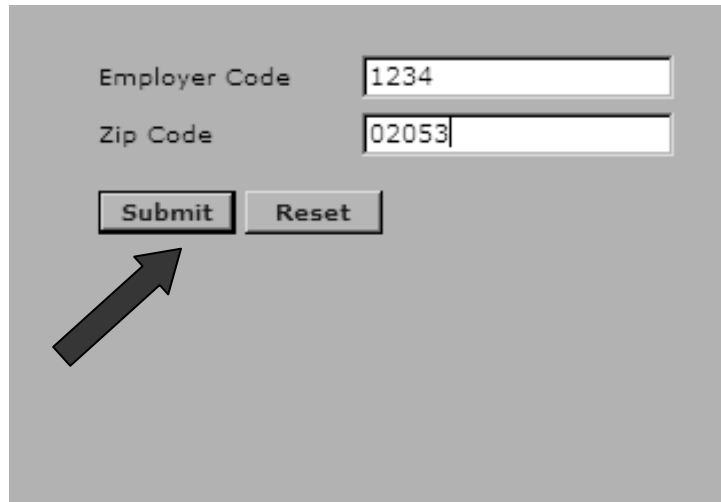
JUST MAIL THE CHECK

# 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.



Employer Code

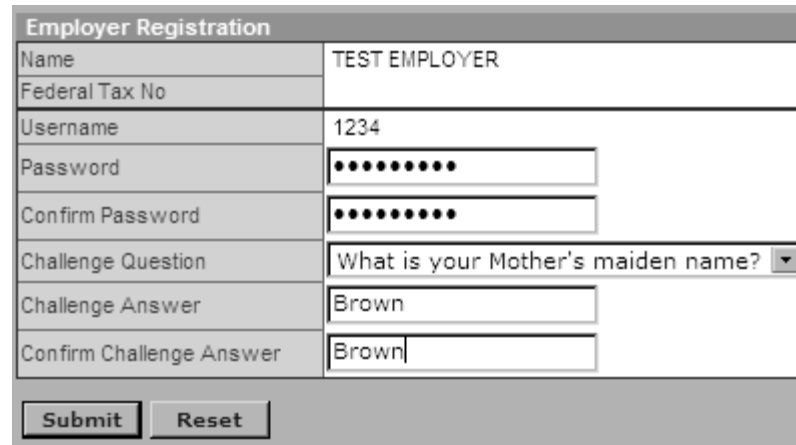
Zip Code




**Username = Employer Account Number**

**Password = Choose 6-10 Characters**

**Select a challenging question and remember the answer!**



Employer Registration	
Name	TEST EMPLOYER
Federal Tax No	
Username	1234
Password	••••••••
Confirm Password	••••••••
Challenge Question	What is your Mother's maiden name? ▾
Challenge Answer	Brown
Confirm Challenge Answer	Brown



**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.


Log into the Employer Web to do the following:

- View / Update Employer Profile Information
- View / Submit Work Report Information
- Transmit Work Report Information Electronically

**Registered Employers**

User Name	<input type="text" value="1234"/>
Password *	<input type="password" value="•••••"/>

[Forgot Password](#) | [Home](#)



# 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.

The screenshot displays the ESS application interface. At the top is the **Top Navigation Bar** with three buttons: "Employer Information", "Change Password", and "Log out". On the left side is the **Section Navigation** bar, which includes a "Profile" button and a list of links: "Billing Location", "Work History Reports", "Payment History", and "Account Details". The main **Display Area** shows the following information:

Employer	
Employer Name	TEST EMPLOYER
Employer Code	1234

Employer Address	
Address 1	16 TROTTER DR
Address 2	
Care Of	
City	MEDWAY
State	Massachusetts
Zip	02053
Country	US
Phone	(888) 888-8888
Fax	(000) 000-0000
E Mail	

Contact Information	
Contact Type	Billing
First Name	ESS
Last Name	MODULE
Phone	(888) 555-5555
Fax	(888) 999-9999
E Mail	

# Top Navigation Bar

Three main choices:

## 1. Employer Information

Displays information regarding the Employer

The screenshot shows the 'Employer Information' page. At the top, there is a navigation bar with 'Employer Information', 'Change Password', and 'Log out'. On the left, a sidebar menu lists 'Profile', 'Billing Location', 'Work History Reports', 'Payment History', and 'Account Details'. The main content area is divided into three sections: 'Employer', 'Employer Address', and 'Contact Information'. The 'Employer' section shows 'Employer Name' as 'TEST EMPLOYER' and 'Employer Code' as '1234'. The 'Employer Address' section lists 'Address 1' as '16 TROTTER DR', 'City' as 'MEDWAY', 'State' as 'Massachusetts', 'Zip' as '02053', 'Country' as 'US', 'Phone' as '(888) 888-8888', 'Fax' as '(000) 000-0000', and 'E Mail'. The 'Contact Information' section shows 'Contact Type' as 'Billing', 'First Name' as 'ESS', 'Last Name' as 'MODULE', 'Phone' as '(888) 555-5555', 'Fax' as '(888) 999-9999', and 'E Mail'.

## 2. Change Password

Allows the Employer to change their password

The screenshot shows the 'Change Password' page. At the top, there is a navigation bar with 'Employer Information', 'Change Password', and 'Log out'. The main content area is titled 'Change Password' and contains a message: 'Please note that new password must be between 6-10 characters long'. Below this is a 'Password Update' section with three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom of the form are 'Submit' and 'Reset' buttons.

## 3. Logout

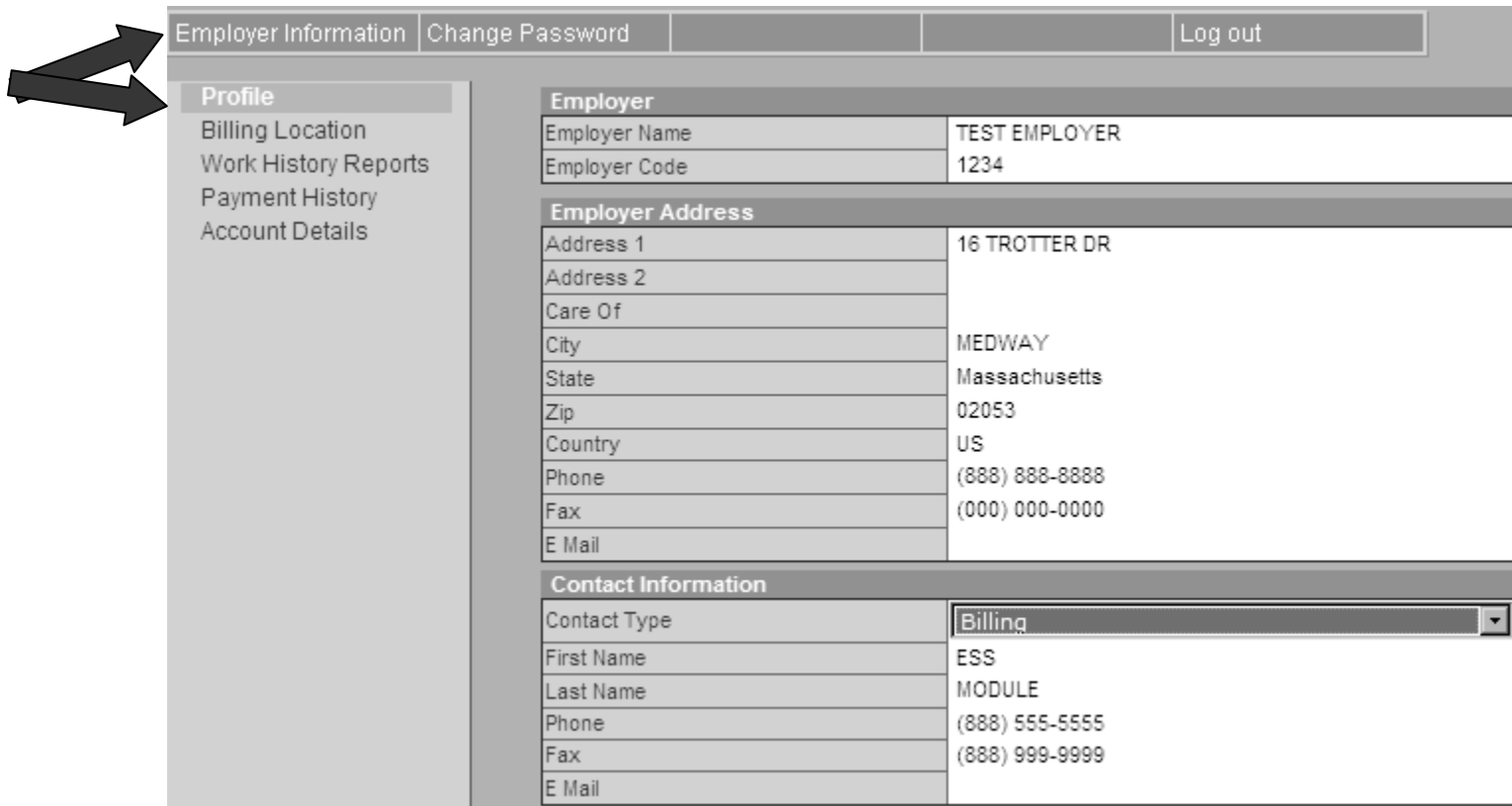
Allows Employer to logout of the ESS application, returning to the Benefit Funds Office Employer web page



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.



The screenshot shows a web interface with a top navigation bar and a left sidebar. The top navigation bar contains 'Employer Information', 'Change Password', and 'Log out'. The left sidebar has a 'Profile' section with sub-items: 'Billing Location', 'Work History Reports', 'Payment History', and 'Account Details'. The main content area is divided into three sections: 'Employer', 'Employer Address', and 'Contact Information'. The 'Employer' section shows 'TEST EMPLOYER' and code '1234'. The 'Employer Address' section shows '16 TROTTER DR', 'MEDWAY', 'Massachusetts', '02053', and 'US'. The 'Contact Information' section shows 'Billing' as the contact type, 'ESS' as the first name, 'MODULE' as the last name, and phone numbers '(888) 555-5555' and '(888) 999-9999'. Two large black arrows on the left point to the 'Profile' and 'Employer Information' sections.

Employer Information	
Employer Name	TEST EMPLOYER
Employer Code	1234
Employer Address	
Address 1	16 TROTTER DR
Address 2	
Care Of	
City	MEDWAY
State	Massachusetts
Zip	02053
Country	US
Phone	(888) 888-8888
Fax	(000) 000-0000
E Mail	
Contact Information	
Contact Type	Billing
First Name	ESS
Last Name	MODULE
Phone	(888) 555-5555
Fax	(888) 999-9999
E Mail	

# 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.

The screenshot displays the user interface for changing a password. At the top, a navigation bar contains three items: 'Employer Information', 'Change Password', and 'Log out'. A black arrow points to the 'Change Password' link. Below the navigation bar, the main content area is titled 'Change Password'. A message states: 'Please note that new password must be between 6-10 characters long'. Below this message is a form titled 'Password Update' with three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom of the form are two buttons: 'Submit' and 'Reset'.

# 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.

Log into the Employer Web to do the following:

- View / Update Employer Profile Information
- View / Submit Work Report Information
- Transmit Work Report Information Electronically

## Registered Employers

User Name	<input type="text" value="1234"/>
Password *	<input type="password"/>

[Forgot Password](#) | [Home](#)

## Forgotten Password

Employer Code	<input type="text" value="1234"/>
Zip Code	<input type="text" value="02053"/>

## Forgotten Password

Challenge Question	What is your Mother's maiden name?
Answer	<input type="text" value="Brown"/>

## Change Password

New Password	<input type="password"/>
Confirm Password	<input type="password"/>

1



2

3

4

# 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.

The screenshot shows the website for the International Union of Operating Engineers Local 4 Benefit Funds. The page features a header with a bridge image and the organization's name. A navigation bar contains links such as Home, Welcome, Fund Administration, About Us, Office Locations, Participants, Participant Forms, Retirees, Employers, Upcoming Events, Publications, Helpful Links, Local 4 Website, Training Website, and Contact Us. The main content area is divided into two columns. The left column is titled 'Employer Self Service (ESS)' and contains a numbered list of steps: 1. [Print ESS documentation](#), 2. [Register for a Username and Password](#), and 3. [ESS \(Employer Self Service\)](#). Below this list is a link for 'Questions - E-mail us: [Office@local4funds.org](mailto:Office@local4funds.org)'. The right column is titled 'Message Board Important!' and contains a link for '[Additional Security Requirements](#)' with a sub-link '[How do I tell what version I have?](#)'. Below this is a section for 'Supported Browser Software' with links for '[Microsoft Internet Explorer Version 7](#)' and '[Microsoft Internet Explorer Version 6 with security changes](#)', and a link to '[Upgrade your Microsoft Internet Explore](#)'. At the bottom of the page, there are links for '[401K Deferral Amounts](#)', '[Wage Schedules](#)', '[ESS Enhancements](#)', and '[Employer Adjustments](#)'. Three arrows point to specific areas: 'ESS Application Reporting Steps' points to the ESS section, 'Employer Information' points to the bottom links, and 'Employer Message Board' points to the Message Board section.

International Union of Operating Engineers  
Local  
4  
Benefit Funds

Home • Welcome • Fund Administration • About Us • Office Locations • Participants • Participant Forms • Retirees • Employers • Upcoming Events • Publications • Helpful Links • Local 4 Website • Training Website • Contact Us

ESS Application Reporting Steps

Employer Self Service (ESS)

- [1. Print ESS documentation](#)
- [2. Register for a Username and Password](#)
- [3. ESS \(Employer Self Service\)](#)

Questions - E-mail us: [Office@local4funds.org](mailto:Office@local4funds.org)

Message Board  
Important!

[Additional Security Requirements](#)

[How do I tell what version I have?](#)

Supported Browser Software

[Microsoft Internet Explorer Version 7](#)

[Microsoft Internet Explorer Version 6 with security changes](#)

[Upgrade your Microsoft Internet Explore](#)

[401K Deferral Amounts](#)

[Wage Schedules](#)

[ESS Enhancements](#)

[Employer Adjustments](#)

Employer Message Board

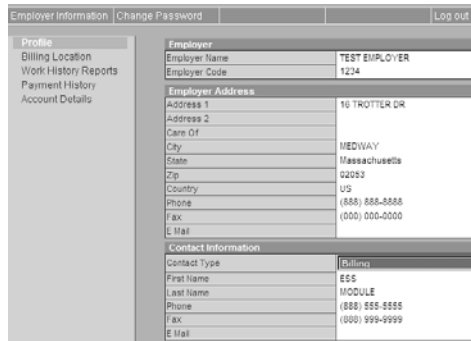
Employer Information



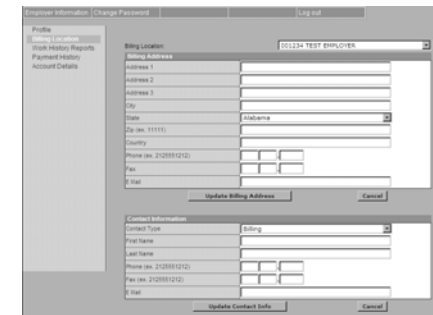
# Section Navigation Bar

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

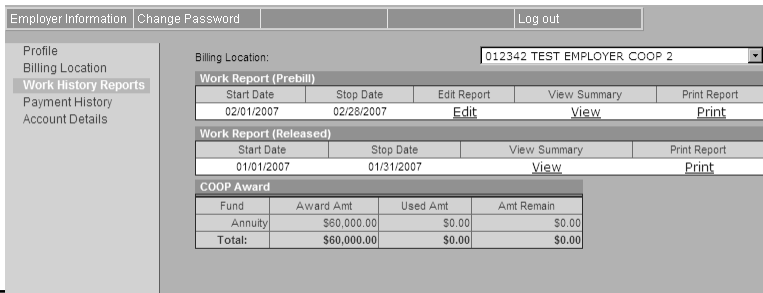
## 1. Profile



## 2. Billing Location



## 3. Work History Reports




Start Date	Stop Date	Edit Report	View Summary	Print Report
02/01/2007	02/28/2007	Edit	View	Print

Start Date	Stop Date	View Summary	Print Report
01/01/2007	01/31/2007	View	Print


Fund	Award Amt	Used Amt	Amt Remain
Annuity	\$60,000.00	\$0.00	\$0.00
<b>Total:</b>	<b>\$60,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

## 4. Payment History



Trans#	Deposit Date	Payment Type	Check#	Bank Acct#	Batch#	Status	Amount
925857	03/19/2007	Check				Closed	\$4,996.40

## 5. Account Details

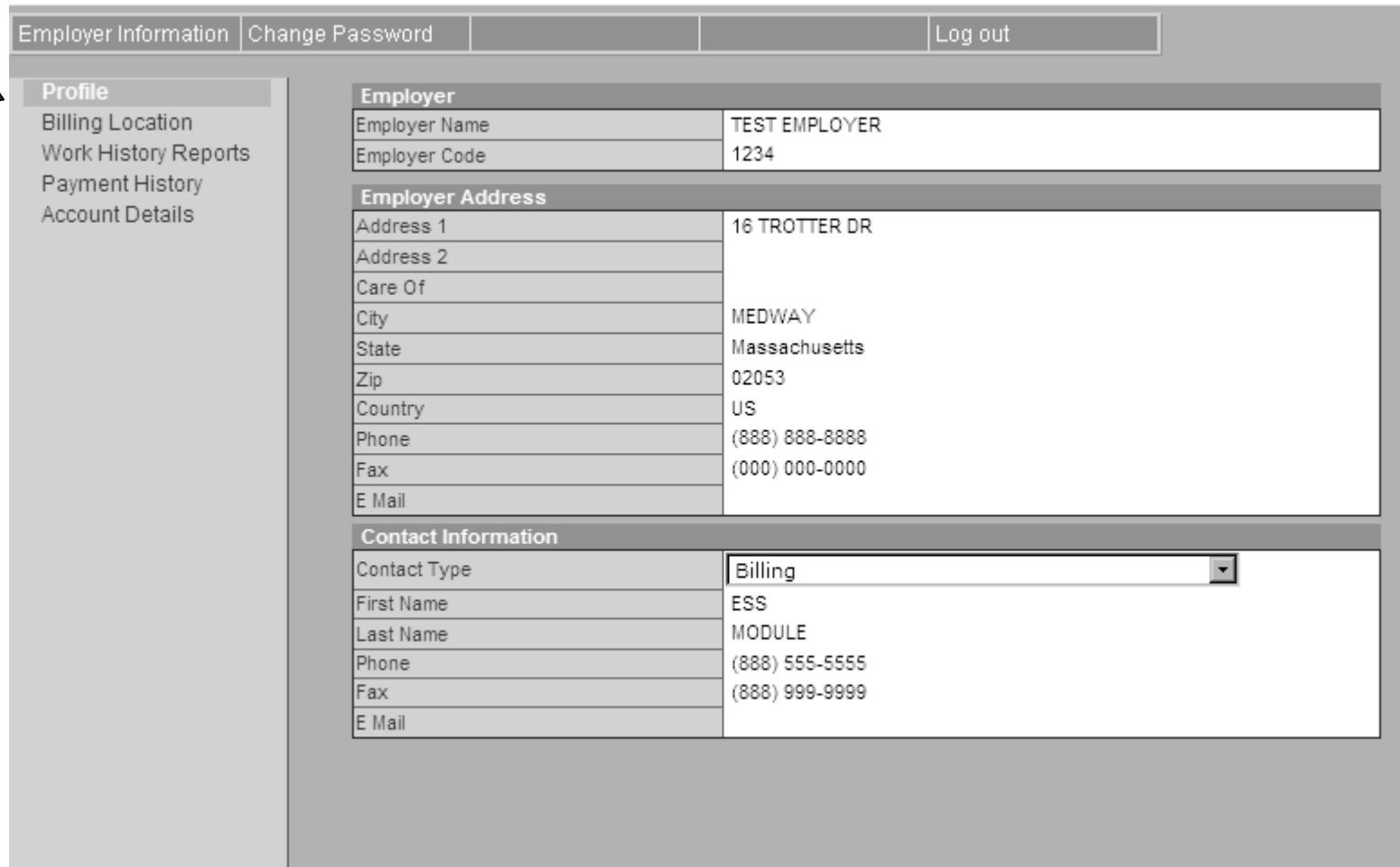


Trans#	Posting Date	Activity Date	Due Date	Transaction Type	Report Status	Identifier	Cumulative Balance
925858	07/30/2007	03/01/2007	04/30/2007	WH Report	Prebill	Billing Rpt 2007-03	\$0.00
925852	07/30/2007	02/01/2007	03/31/2007	WH Report	Released	Billing Rpt 2007-02	\$0.00
925851	07/30/2007	01/01/2007	02/28/2007	WH Report	Released	Billing Rpt 2007-01	\$0.00

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. This screen cannot be edited via the ESS Application. 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.



The screenshot shows a web interface for an employer's profile. At the top, there are navigation tabs: "Employer Information", "Change Password", and "Log out". On the left side, there is a vertical menu with the following items: "Profile", "Billing Location", "Work History Reports", "Payment History", and "Account Details". A black arrow points to the "Profile" link. The main content area is divided into three sections: "Employer", "Employer Address", and "Contact Information".

Employer	
Employer Name	TEST EMPLOYER
Employer Code	1234

Employer Address	
Address 1	16 TROTTER DR
Address 2	
Care Of	
City	MEDWAY
State	Massachusetts
Zip	02053
Country	US
Phone	(888) 888-8888
Fax	(000) 000-0000
E Mail	

Contact Information	
Contact Type	Billing
First Name	ESS
Last Name	MODULE
Phone	(888) 555-5555
Fax	(888) 999-9999
E Mail	

# 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.

The screenshot shows a web application interface for managing billing information. At the top, there are tabs for "Employer Information", "Change Password", and "Log out". On the left, a navigation menu includes "Profile", "Billing Location" (highlighted), "Work History Reports", "Payment History", and "Account Details". The main content area is divided into two sections: "Billing Location" and "Contact Information".

The "Billing Location" section features a dropdown menu for the account number, currently showing "001234 TEST EMPLOYER". Below this are several input fields for the billing address: "Address 1", "Address 2", "Address 3", "City", "State" (set to "Alabama"), "Zip (ex. 11111)", "Country", "Phone (ex. 2125551212)", and "Fax". At the bottom of this section are "Update Billing Address" and "Cancel" buttons.

The "Contact Information" section includes a dropdown for "Contact Type" (set to "Billing"), and input fields for "First Name", "Last Name", "Phone (ex. 2125551212)", "Fax (ex. 2125551212)", and "E-mail". At the bottom are "Update Contact Info" and "Cancel" buttons.

Four black arrows point to specific elements: one to the "Billing Location" menu item, one to the account number dropdown, one to the "Update Billing Address" button, and one to the "Update Contact Info" button.

# 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.

The screenshot shows a web interface for Work History Reports. At the top, there are navigation links: Employer Information, Change Password, and Log out. On the left, a vertical menu contains: Profile, Billing Location, Work History Reports (highlighted), Payment History, and Account Details. Arrows point from the menu to the main content area. The main content area includes a Billing Location dropdown menu set to '012342 TEST EMPLOYER COOP 2'. Below this are three sections: Work Report (Prebill), Work Report (Released), and COOP Award. Each section contains a table with columns for dates, actions (Edit, View, Print), and monetary values.

Start Date	Stop Date	Edit Report	View Summary	Print Report
03/01/2007	03/31/2007	<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Print</a>

Start Date	Stop Date	View Summary	Print Report
02/01/2007	02/28/2007	<a href="#">View</a>	<a href="#">Print</a>
01/01/2007	01/31/2007	<a href="#">View</a>	<a href="#">Print</a>

Fund	Award Amt	Used Amt	Amt Remain
Annuity	\$60,000.00	\$945.00	\$59,055.00
<b>Total:</b>	<b>\$60,000.00</b>	<b>\$945.00</b>	<b>\$59,055.00</b>

# 4. Work Report (Prebill)

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

The screenshot displays a web interface for an employer. At the top, there are navigation tabs: "Employer Information", "Change Password", and "Log out". On the left side, a vertical menu contains the following items: "Profile", "Billing Location", "Work History Reports" (highlighted with a grey background), "Payment History", and "Account Details".

The main content area features a "Billing Location:" dropdown menu with the value "012342 TEST EMPLOYER COOP 2". Below this, there are three sections:

- Work Report (Prebill)**: A table with columns for Start Date, Stop Date, Edit Report, View Summary, and Print Report. The first row shows dates 03/01/2007 and 03/31/2007, with links for Edit, View, and Print.
- Work Report (Released)**: A table with columns for Start Date, Stop Date, View Summary, and Print Report. It contains two rows of data with corresponding View and Print links.
- COOP Award**: A table with columns for Fund, Award Amt, Used Amt, and Amt Remain. It shows a total award of \$60,000.00, with \$945.00 used and \$59,055.00 remaining.

Start Date	Stop Date	Edit Report	View Summary	Print Report
03/01/2007	03/31/2007	<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Print</a>

Start Date	Stop Date	View Summary	Print Report
02/01/2007	02/28/2007	<a href="#">View</a>	<a href="#">Print</a>
01/01/2007	01/31/2007	<a href="#">View</a>	<a href="#">Print</a>

Fund	Award Amt	Used Amt	Amt Remain
Annuity	\$60,000.00	\$945.00	\$59,055.00
<b>Total:</b>	<b>\$60,000.00</b>	<b>\$945.00</b>	<b>\$59,055.00</b>

# 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.

Employer Information | Change Password | Log out

Profile  
Billing Location  
**Work History Reports**  
Payment History  
Account Details

**Employer**

Employer Name	TEST EMPLOYER
Employer Code	1234
Billing Location	TEST EMPLOYER COOP 2
Billing Location Number	012342
Agreement	LOCAL 4

Job Name : coop 2      Sort By : [ ]      COOP Award Amount Total - \$59,055.00

Period - 03/01/2007 to 03/31/2007

Ssn	Name	TotHrs	OTHrs	Wages	Dues	SAC	401K	Delete
525252525	TEST 1, ESS TEST	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
626262626	TEST 2, ESS	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
323232323	TEST 3, ESS	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
Total Members: 3		0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	

**Due Amount**

Fund	Amount Due
H&W	\$0.00
Pension	\$0.00
Appr	\$0.00
Annuity	\$0.00
401(k)	\$0.00
Dues	\$0.00
SAC	\$0.00
CoOp	\$0.00
Fair Contract	\$0.00
<b>TOTAL</b>	<b>\$0.00</b>

[ Add ] [ Save ] [ Submit ] [ Cancel ] [ Delete ] [ View Summary ]

Always save before submission of report!

# Work History Buttons

Add	Save	Submit	Cancel	Delete	View Summary
<p>The “Add” button allows an Employer to add a new member or add an existing member to the roster.</p>	<p>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!</p> <p><b>Please note:</b> If the “Save” button is not selected prior to clicking “Submit,” all information will be lost.</p> <p>SAVE OFTEN!</p>	<p>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.</p> <p><b>Please note:</b> If the “Save” button is not selected prior to clicking “Submit,” all information will be lost; the report will be submitted with no data.</p> <p>SAVE OFTEN!</p>	<p>The “Cancel” button will clear all information and take the Employer back to the Work History view.</p> <p><b>Please note:</b> Any data that has been saved and submitted cannot be canceled. The Employer Help Desk is available for any questions: 508-533-1400 x100.</p>	<p>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.</p>	<p>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.</p> <p><b>Please note:</b> Any data that has been saved and submitted cannot be changed electronically.</p>



**Add Existing 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.

Employer Information | Change Password | Log out

Profile  
Billing Location  
**Work History Reports**  
Payment History  
Account Details

666668888

**Employer**

Employer Name	TEST EMPLOYER
Employer Code	1234
Billing Location	TEST EMPLOYER COOP 2
Billing Location Number	012342
Agreement	LOCAL 4

Job Name : coop 2      Sort By : [ ]      COOP Award Amount Total - \$59,055.00

Period - 03/01/2007 to 03/31/2007

Ssn	Name	TotHrs	OTHrs	Wages	Dues	SAC	401K	Delete
								<input type="checkbox"/>
525252525	TEST 1, ESS TEST	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
626262626	TEST 2, ESS	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
323232323	TEST 3, ESS	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
Total Members: 4		0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	

**Due Amount**

Fund	Amount Due
H&W	\$0.00
Pension	\$0.00
Appr	\$0.00
Annuity	\$0.00
401(k)	\$0.00
Dues	\$0.00
SAC	\$0.00
CoOp	\$0.00
Fair Contract	\$0.00
<b>TOTAL</b>	<b>\$0.00</b>

**Add**   **Save**   **Submit**   **Cancel**   **Delete**   **View Summary**

**Add a New Member** – Also select the “Add” button to enter a new 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.

Employer Information    Change Password    Log out

Profile  
Billing Location  
**Work History Reports**  
Payment History  
Account Details

**Add Member 666668888**

**Employer**

Employer Name	TEST EMPLOYER
Employer Code	1234
Billing Location	TEST EMPLOYER COOP 2
Billing Location Number	012342
Agreement	LOCAL 4

Job Name : coop 2      Sort By :      COOP Award Amount Total - \$59,055.00

Period - 03/01/2007 to 03/31/2007

Ssn	Name	TotHrs	OTHrs	Wages	Dues	SAC	401K	Delete
666668888								<input type="checkbox"/>
525252525	TEST 1, ESS TEST	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
626262626	TEST 2, ESS	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
323232323	TEST 3, ESS	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
<b>Total Members:</b> 4		0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	

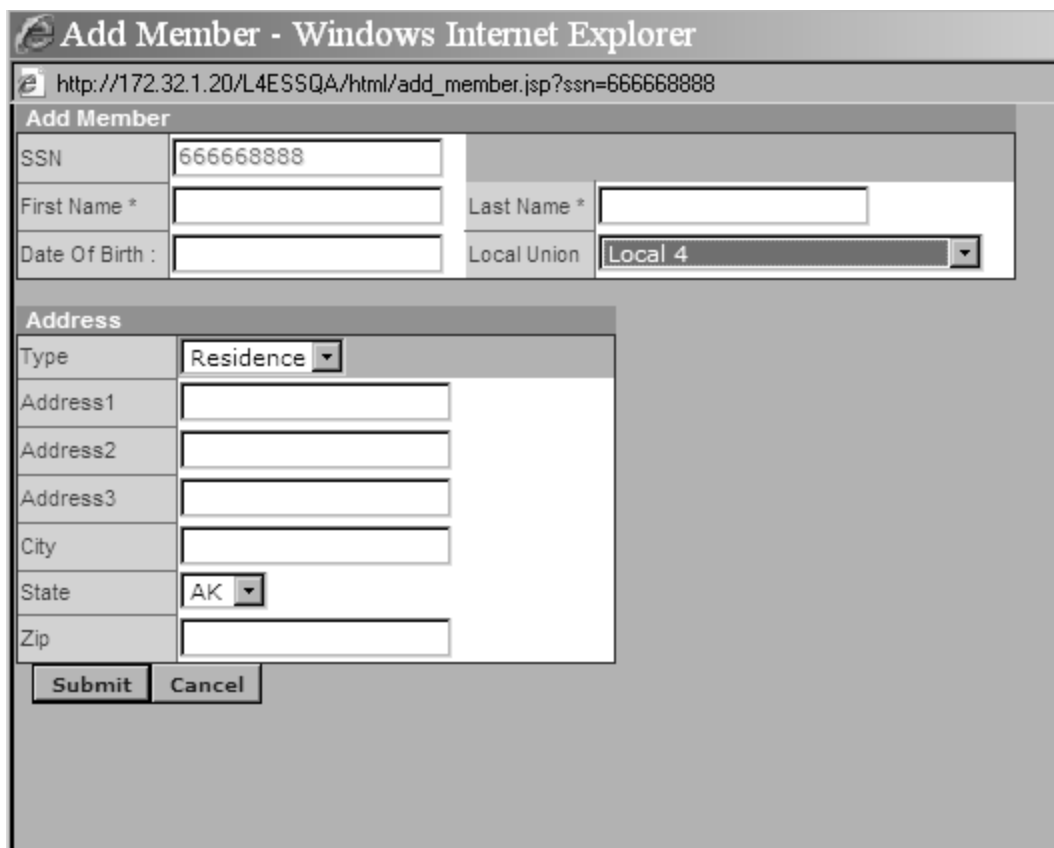
**Due Amount**

Fund	Amount Due
H&W	\$0.00
Pension	\$0.00
Appr	\$0.00
Annuity	\$0.00
401(k)	\$0.00
Dues	\$0.00
SAC	\$0.00
CoOp	\$0.00
Fair Contract	\$0.00
<b>TOTAL</b>	<b>\$0.00</b>

## 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.



The screenshot shows a web browser window with the title "Add Member - Windows Internet Explorer". The address bar displays the URL "http://172.32.1.20/L4ESSQA/html/add\_member.jsp?ssn=666668888". The form is titled "Add Member" and contains the following fields:

SSN	<input type="text" value="666668888"/>		
First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Date Of Birth :	<input type="text"/>	Local Union	<input type="text" value="Local 4"/>

The "Address" section includes:

Type	<input type="text" value="Residence"/>
Address1	<input type="text"/>
Address2	<input type="text"/>
Address3	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="AK"/>
Zip	<input type="text"/>

At the bottom of the form are two buttons: "Submit" and "Cancel".

# 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](http://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.

Employer Information | Change Password | Log out

Profile  
Billing Location  
Work History Reports  
**Payment History**  
Account Details

Billing Location: 012342 TEST EMPLOYER COOP 2

Payment History							
Trans#	Deposit Date	Payment Type	Check#	Bank Acct#	Batch#	Status	Amount
925857	03/19/2007	Check				Closed	\$4,996.40

# 5. Account Detail

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

The screenshot shows a web interface with a top navigation bar containing 'Employer Information', 'Change Password', and 'Log out'. A left sidebar menu includes 'Profile', 'Billing Location', 'Work History Reports', 'Payment History', and 'Account Details' (which is highlighted and pointed to by an arrow). The main content area features a 'Billing Location' dropdown menu set to '012342 TEST EMPLOYER COOP 2'. Below this is a table titled 'Account Details' with the following data:

Trans#	Posting Date	Activity Date	Due Date	Transaction Type	Report Status	Identifier	Cumulative Balance
925856	07/30/2007	03/01/2007	04/30/2007	WH Report	Prebill	Billing Rpt 2007-03	\$0.00
925852	07/30/2007	02/01/2007	03/31/2007	WH Report	Released	Billing Rpt 2007-02	\$0.00
925851	07/30/2007	01/01/2007	02/28/2007	WH Report	Released	Billing Rpt 2007-01	\$0.00

Two arrows point from the text below to the 'Report Status' and 'Identifier' columns of the table. The text explains that 'Prebill' status is used until a check is received, and 'Released' status is used when the report is released. It also notes that the 'Identifier' column uses a year-month format for tracking.

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

**W**hat 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!