



EmployerXG V2

QuickGuide

August 2016

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Introduction

The **EmployerXG v2** portal offers you

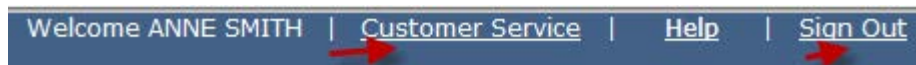
- Remittance data entry and payment using the Internet
- Self-service access to remittance history
- Self-service address and contact maintenance

The **EmployerXG v2** 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 will have access to all screens.

Toolbar

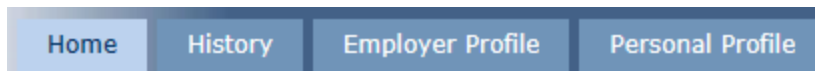
The Tool Bar contains the following options (see screen example).

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



Screens

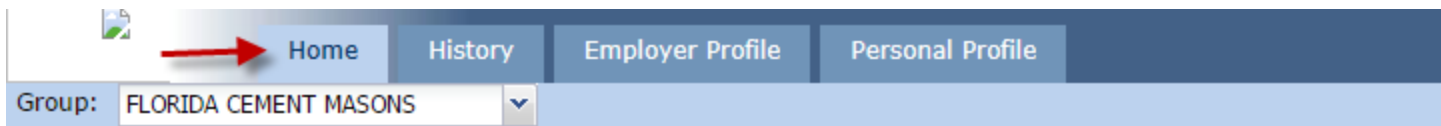
EmployerXG contains the following screens.



- **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	Create Remittance
Due Date	Status	Past Due	Description	Work Period
11/15/2013	Scheduled	!	0001 - REGRESSION 1 - 286_1	201310 10/01/2013 - 10/31/...
03/16/2015	In Progress		0001 - REGRESSION 1 - 286_1	201502 02/01/2015 - 02/28/...

The list of remittances due is displayed in descending order by Due Date. Years without remittances do not display in the listing.

From the **Home** screen, you can

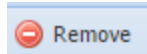
- Open a remittance
- Copy an existing remittance
- Upload a remittance file and receive progress information on the upload
- Create a No Work remittance
- Create a new remittance
- Access valuable News and Information

Open a remittance

1. From the **Your Remittances Due** table, select the remittance that you want to view
2. Click **Open**.

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 a remittance

1. Select the remittance in which you want to edit new employee information and then click **Open**.
2. Select the employee whose information you want to edit and click **Edit**.



3. Update the desired information and click **Save**.
4. Click the **Pay** button, if desired.

Add a new employee to an existing remittance

1. Select the remittance to which you want to add a new employee and then click **Open** (see following screen example).



Home

History

Employer Profile

Personal Profile

Group: **Workers Group 218M**Description: **218M - Workers Group 218M - 218CWCA09 - CW2012_21...**Work Period: **012012 01/01/2012 - 01/31/2012****Employee Details**

Edit



Remove



Details



Employees

Remitter*:

MS CONSTRUCTION



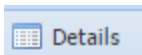
	Employee SSN	Name	HW	Amount Due	Status
<input type="checkbox"/>	218100001	JOHN PETSON	40	\$580.00	✓
<input type="checkbox"/>	218100002	FARLEY FRYE	52	\$754.00	✓
<input type="checkbox"/>	218100004	ROGER T CRANSTON	38	\$551.00	✓
<input type="checkbox"/>	218100005	ROBERT Z BOBSON CPA	50	\$725.00	✓
<input type="checkbox"/>				\$0.00	⚠

2. Enter the **SSN** number of the employee that you want to add to the remittance and press **Enter** or the Tab key.
3. At a minimum, complete the required fields which are indicated by an asterisk.
4. Click **Save**.
5. Enter the necessary information, for example, **HW**.
6. Click the **Pay** button, if desired.

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 previous 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**.



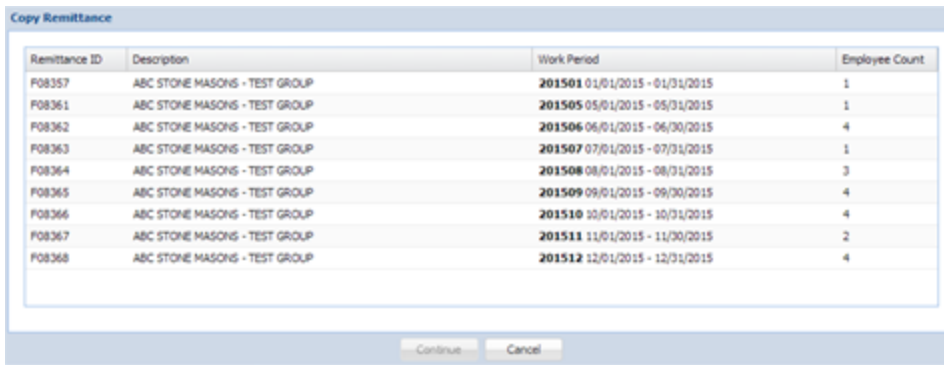
Details

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**.

A screenshot of a "Copy Remittance" window. It contains a table with four columns: Remittance ID, Description, Work Period, and Employee Count. The table lists ten rows of test data for "ABC STONE MASONS - TEST GROUP" with various remittance IDs and work periods. At the bottom of the window are "Continue" and "Cancel" buttons.

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

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 **Pay** button, if desired.

Upload and pay a remittance

Note: You can only upload "Due" remittances if your setup permits.


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**.




3. Click the **Next** button in the Wizard.
4. Enter a comment in the **Comment** field. This is a required field.

5. Click the **Pay** button at the bottom of the **Employee Details** screen.
6. Choose the **Payment Method** by using the dropdown menu to the right of the Payment Method field. Choose Payment Method as "**Check**" if you plan to mail a check or "**EFT**" if you wish to pay online via EFT. **Note:** These choices are setup so you may only be able to select one option.
7. At the "Accept my remittance and process my payment(s) on:" prompt, enter the date.
8. Select the Fund to pay.
9. Select the **Due**, **Due + Damages**, or **Other** radio button. **Note:** These choices are configured so all options may not be available.


The screen looks like this (example).

Payment Method*:
 BANK OF BASYS: *6637  [Bank Account Maintenance](#)

Accept my remittance and process my payment(s) on*:
 10/28/2014 

You are making a payment for Group 0001.

Select a Remittance to pay						
	Remittance ID	Employer Number	Due Date	Description	Work Period	Amount Due
<input checked="" type="checkbox"/>	F32419	ANNESEMP	01/15/2015	0001 - REGRESS...	201412 12/01/2...	\$28,868.97

Due
 Due + Damages 
 Other

10. Click **Apply**.
11. Click **Confirm**.
12. Click **OK** to confirm the payment.
13. Click **Print Confirmation**. How the pdf displays depends on the internet browser you are using. You will also receive an email confirming payment.

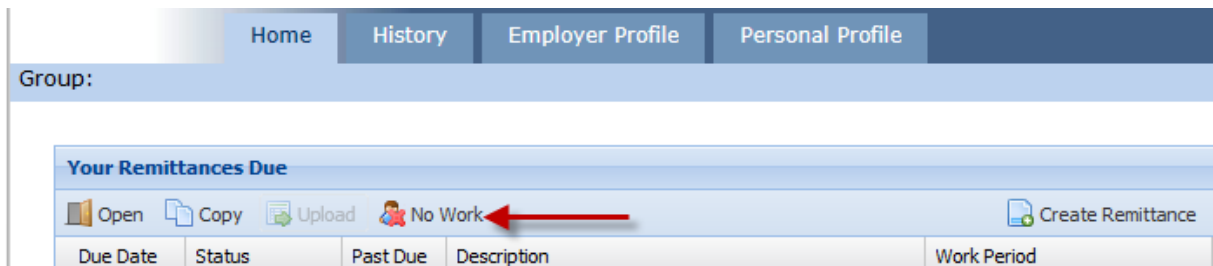
You can view the progress of the upload from the **Home** screen in the **Upload Progress** table (see following example).

Upload Progress			
Remittance	Group Code	Work Period	Status
F32398	0001	201303	Uploaded
F32402	0001	201307	Uploaded

The status can be "Uploading," "Uploaded," or "Error." After payment has been made, the uploaded information no longer displays in the table.

Create a No Work remittance

1. Select the remittance to which you want to apply No Work.
2. Click **No Work**.



If you click on a remittance that is "Due," the **No Work To Report** popup box displays (see following screen). The No Work option is disabled for remittances that are In Progress.

No Work To Report

Reference Number: D94187

Due Date: 07/15/2013

Payment Date: 10/17/2014

Status: Review

Click OK to confirm
Click Cancel to return Home

OK Cancel

3. Click **OK** to confirm.

4. Click **Download Confirmation** to initiate a PDF receipt download.
5. Open the PDF to view the **Remittance Confirmation** (see following screen example).

FLORIDA CEMENT MASONS

Remittance Confirmation

<i>Employer Code:</i>	128600000	<i>Agreement:</i>	REGRESSION 3
<i>Employer Name:</i>	REGRESSION COMPANY	<i>Contract:</i>	REGRESSION 3
<i>Reference Number:</i>	F07858	<i>Payroll Dates:</i>	6/1/2014 - 6/30/2014
<i>Due Date:</i>	7/15/2014	<i>Report Period:</i>	201406
<i>Payment Date:</i>	10/21/2014	<i>User Name:</i>	COURTNEY JOHANSSON
<i>Scheduled Date:</i>	N/A	<i>Grand Total:</i>	No work to report
<i>Payment Method:</i>	N/A	<i>Check #:</i>	N/A

Generated on: 10/21/2014

Create a new remittance

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



The **Create New Remittance** screen displays.

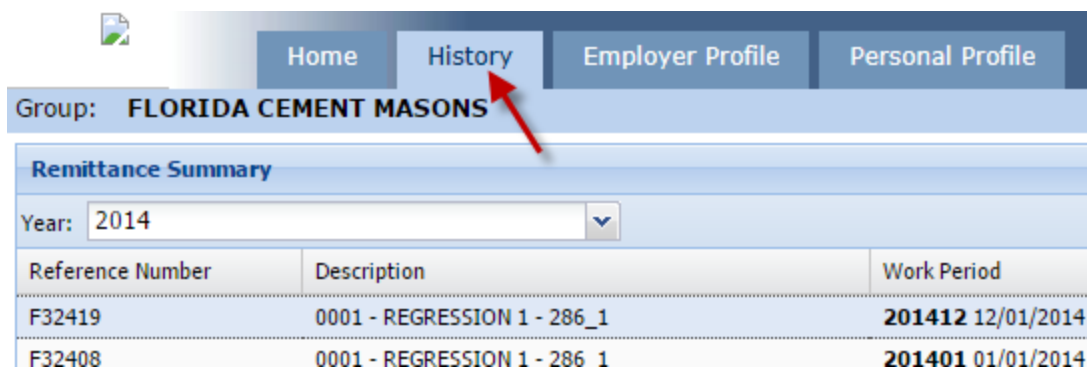
2. At a minimum, enter information into the **Payroll From Date** and **Payroll Thru Date** fields in MM/DD/YYYY format or use the calendar icon to the right of each Payroll field to select the dates.
3. Click **Get Agreements**.

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.

History

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



Group: **FLORIDA CEMENT MASONS**

Remittance Summary

Year: 2014

Reference Number	Description	Work Period
F32419	0001 - REGRESSION 1 - 286_1	201412 12/01/2014
F32408	0001 - REGRESSION 1 - 286 1	201401 01/01/2014

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

View and print a receipt of a selected history remittance

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 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. Open the PDF receipt file and the following screen displays (example).

LOCAL 0003 DISTRICT COUNCIL

Remittance Receipt

<i>Employer Code:</i>	128600001	<i>Reference Number:</i>
<i>Employer Name:</i>	ITS REGRESSION TIME	<i>Agreement:</i>
<i>County:</i>	ITS REGRESSION TIME	<i>Contract:</i>
<i>Scheduled Date:</i>	N/A	<i>Due Date:</i>
<i>Payroll Dates:</i>	6/1/2013 - 6/30/2013	<i>Report Period:</i>
<i>Payment Method:</i>	EFT-****9045	<i>Payment Date:</i>
<i>Check #:</i>	N/A	
<i>Grand Total:</i>	\$43,913.60	<i>User Name:</i>
		<i>Contact Name:</i>

Fund	Amount Due	Damage Due	Total Due
ANNUITY FUND	2783.46	6012.11	8795.57
PENSION FUND	12524.34	22543.69	35068.03
PORT SUPP TEST	50.00	0.00	50.00
Total:	\$15,357.80	\$28,555.80	\$43,913.60

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 **Employee**.
4. Click **Open**.

The 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.



The screenshot shows a navigation bar with four tabs: Home, History, Employer Profile (selected), and Personal Profile. Below the tabs, the group name is "FLORIDA CEMENT MASONS". A red arrow points to the "Employer Profile" tab. Underneath, the "Primary Address" is listed as "123 TESTING WAY, LINTHICUM HTS, MD 21090, USA". Below that is a table titled "Employer Contacts" with columns for First Name, Last Name, Generation, Title, and C. The table contains two rows: ANNE SMITH (Generation A) and NICOLE MACKENZIE (Title LPN).

Group: **FLORIDA CEMENT MASONS**

Primary Address

123 TESTING WAY
LINTHICUM HTS, MD 21090
USA

Employer Contacts

+ Add Edit - Delete

First Name	Last Name	Generation	Title	C
ANNE	SMITH			A
NICOLE	MACKENZIE		LPN	

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.

Manage Contact

* = Required

First Name*: E-mail*:

Last Name*: Phone Number:

Generation: Phone Number (Alt):

Title:

EmployerXG User Send EmployerXG invitation email

Account Status*: User Role*:

Save Cancel

- 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.
- 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.

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

[Home](#)
[History](#)
[Employer Profile](#)
[Personal Profile](#)

Group: **FLORIDA CEMENT MASONS**

Primary Address

123 TESTING WAY
LINTHICUM HTS, MD 21090
USA

Employer Contacts

First Name	Last Name	Generation	Title	Contact Type	Email
ANNE	SMITH			ADMIN	anne@basy.com
NICOLE	MACKENZIE		LPN		nikki@gmail.com
ALLISON	RANDALL		PhD		alli@hotmail.com
BRENT	MILLER	II	MD		bmi@gmail.com

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

Manage Contact

* = Required

First Name*:
 E-mail*:

Last Name*:
 Phone Number:

Generation:
 Phone Number (Alt):

Title:
 Contact Type:

EmployerXG User
 Send EmployerXG invitation email

Account Status*:
 User Role*:

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).



Group: **FLORIDA CEMENT MASONS**

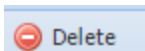
Primary Address
123 TESTING WAY
LINTHICUM HTS, MD 21090
USA

Employer Contacts

+ Add Edit - Delete

First Name	Last Name	Generation	Title	Contact Type	Email
ANNE	SMITH			ADMIN	anne@basys.com
NICOLE	MACKENZIE		LPN		nikki@gmail.com
ALLISON	RANDALL		PhD		alli@hotmail.com
BRENT	MILLER	II	MD		bmi@gmail.com

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.

Your Preferences

* = Required

Copy Remittance Options*:
Employee ID, Name, and Quantities x v

Default Group*:
FLORIDA CEMENT MASONS x v

Scheduled Payment Confirmation*:
Primary Contact x v

Remittance Processed Alert*:
Primary Contact x v

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 is 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.

[Your Bank Account](#)

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).

The screenshot displays a web application interface for a user profile. At the top, there is a navigation bar with tabs for 'Home', 'History', 'Employer Profile', and 'Personal Profile'. A red arrow points to the 'Personal Profile' tab. Below the navigation bar, the group name 'FLORIDA CEMENT MASONS' is displayed. The main content area is divided into two panels: 'Contact Information' on the left and 'User Information' on the right. Both panels have a legend indicating that an asterisk (*) denotes a required field. The 'Contact Information' panel includes fields for First Name (ANNE), Last Name (SMITH), Generation (a dropdown menu), Title (a dropdown menu), Contact Type (ADMIN), E-mail (anne@FLCEMAS.com), Phone Number, and Phone Number (Alt). The 'User Information' panel includes fields for Username (anneemp), Old Password, New Password, Confirm Password, Challenge Question 1 (a dropdown menu), Challenge Answer 1, Challenge Question 2 (a dropdown menu), and Challenge Answer 2. Each panel has 'Save' and 'Cancel' buttons at the bottom.

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

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