


<p>Introduction</p>	<p>WELCOME</p> <p>Welcome to the V3 User Experience Employer Self Service Demonstration.</p> <p>Please note that you may select specific topics via the demonstration menu, or you may view the demonstration in its entirety.</p> <p>The Employer Self Service Tutorial is for demonstration purposes only, and may not include updates to the application. Please contact the fund office if you need assistance.</p> <p>STOP</p>
<p>Overview</p>	<p>V3 OVERVIEW</p> <p>Our tour of the V3 system begins with the system login screen. Each V3 user has a unique user name and password that they use to access the system.</p> <p>We will begin the demonstration by logging in to the system.</p> <p>PAUSE</p> <p> <input type="text" value="Username"/> <input type="text" value="Password"/> <input type="button" value="Login"/> </p> <p>STOP</p>
<p>1. Login</p> <ol style="list-style-type: none"> 1. Login to V3 2. Forgot Username 3. Forgot Password 4. Initial reset of password and setting security question 	<p>V3 Employer SS</p> <p>START WITH SCREEN ON EMPLOYER SELF SERVICE</p> <p>V3 Employer Self Service allows employers to interact with your organization using a secure, Web-based V3 application.</p>

Employers log in to employer self-service using a valid username and password. New employers may register from the *Log in* screen. When a new employer user logs into the system for the very first time, they will be required to reset their password to proceed into the system.

Login

Monday, September 28, 2009



NEW ENGLAND CARPENTERS BENEFIT FUNDS

User:

Password:

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

Enter your username and password to access *Employer Self Service*. Passwords are case-sensitive. If you forget your username, click on the *Forgot User* link.

PAUSE

[Click on Forgot User link](#)

Enter your Email Address

Enter the e-mail address that is stored in your username profile. If you enter an e-mail address that is not stored in your username profile in *Employer Self Service*, you will receive an error message. You must contact the New England Carpenters Benefit Funds to have a valid e-mail address entered into your username profile. Once you have successfully submitted a valid e-mail address, your username will be sent to the specified e-mail account.

Click *Submit* have the user name sent to the entered email address. If you do not wish to continue on this screen, click *Cancel* to return to the *login* screen.

PAUSE

[Click on Cancel button](#)

If you forget your password, click on the *Forgot Password* link to be reminded.

PAUSE

[Click on Forgot Password link](#)

Please enter your username below. Upon entering the correct username, the system will recall your security question.

Account Lookup

Username:

Enter your username, and then click *Submit*. If you do not wish to continue on this screen, click *Cancel* to

return to the *login* screen.

PAUSE

Enter Username in the username field and hit the Submit button

Enter the correct answer to the security question. Please note that the answer to the security question is NOT case-sensitive.

Click *Submit* to continue, or click *Cancel* to return to the *login* screen.

PAUSE

Enter color in the Answer box, and then hit Submit

Security Question

Select First Security Question: What is your favorite color?

Enter Answer to First Question:

Once you click *Submit* and your security answer has been validated, you are taken to the *Enter New Password* screen.

All fields are required. Your password must only contain alphanumeric characters and have a length between 6 and 24 characters.

Enter New Password

Enter New Password:

Confirm New Password:

Enter and confirm your new password. Click *Submit* to continue, or click *Cancel* to return to the *login* screen.

PAUSE

[Select the Cancel button](#)

Now you can log onto *Employer Self Service*. Enter your username and password:

PAUSE

[Username: name](#)
[Password: password](#)

When logging into *Employer Self Service* for the first time, you are prompted to change your email address and security question.

[Reset Password](#)
[Reset Security Question](#)

2. Basic Navigation

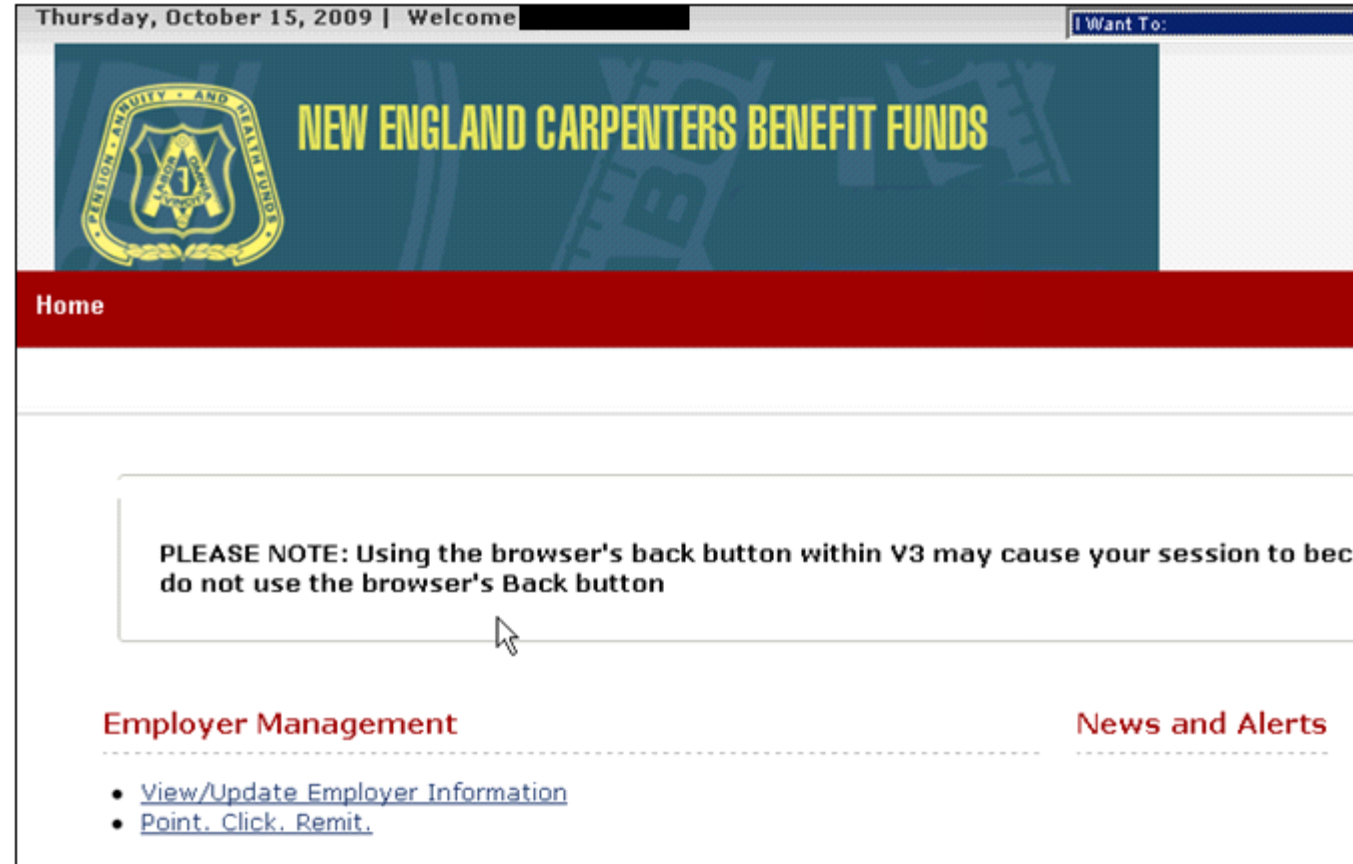
- A. Homepage
 - 1. Welcome information
 - 2. Header Components

Basic Navigation

Once you have successfully logged in to *Employer Self Service*, you are taken to the *Employer Self*

- 3. Location (path)
- 4. Categories and Pages
- 5. News and Alert

Service Employer Home page.



The *Employer Self Service Employer Home* page includes a Welcome Information section, header components, the location (path), main navigation section, and a News and Alerts section.

The Welcome Information section displays the date, the name of the user currently logged in, and the New England Carpenters Benefit Funds logo.

PAUSE

[Scroll across the top of the form to show these fields](#)

Header Components:

The header components include the following:

I Want To—By clicking on the pull-down menu, you may view a list of all the pages you can access. Click any of the links to launch the related page in *Employer Self Service*.

PAUSE

[Pull the drop down to the I Want To menu](#)

Please note that when navigating within Employer Self Service to be mindful of not using browser buttons. The user should use the functions listed in the “I Want To” section to navigate around the system.

[Point cursor over the Please Note message](#)

Account Settings — Clicking on this launches screen where you may change your password and/or your security question/answer.

PAUSE

[Point cursor over the Account Settings](#)

Logout—Clicking this button will exit *Employer Self Service* and return you to the Login screen.

PAUSE

[Point cursor over Logout](#)

Employer Name—This area displays the employer you are currently working with.

PAUSE

[Point cursor over Employer Name](#)

Location Path:

The Location or Path displays your exact location within *Employer Self Service*. This is often referred to as breadcrumbs. On the *Employer Self Service Employer Home* page, you will only see *Home*.

PAUSE

[Point Cursor over Home](#)

If you navigate to another part of *Employer Self Service* your location will display *Home >> Category >> Page*

Navigation Area:

The Home page contains a navigation area with various *Employer Self Service* pages within the application grouped into categories. These categories and pages appear in the location breadcrumbs.

PAUSE

[Circle over the Categories and Pages section](#)

News and Alerts:

Employer Self Service displays messages and reminders in the News and Alerts box on the *Employer Self Service Employer Home* page. The items in News and Alerts are entered by the New England Carpenters Benefit Funds, and then displayed each time an employer logs on to *Employer Self Service*

PAUSE

[Point to the News and Alerts area](#)

STOP

3. Administration Functions

A. Update Account Settings

1. Reset Password
2. Reset Security Question
3. Reset Email

Administrative Functions

Let's look more closely at administrative functions. Administrative functions allow employers to view and update their password and other account settings (such as their security question and Email address).

PAUSE

[Click on View/Update Your Password and Other Account Settings](#)

Administration Functions

- [View/Update Your Password and Other Account Settings](#)

To reset your Password, Security Question or Email Address, simply click the *Checkbox* next to the function you wish to update.

Account Settings

Password Restrictions:
-Password should have a minimum of 6 characters

NOTE: In order to change your password and/or reset your security question, please check the appropriate checkboxes below in order to enable the corresponding fields to be editable. After entering the appropriate information, please hit "Save".

User: MARY

Reset Password

Old Password:

New Password:

Confirm New Password:

Reset Security Question

Security Question:

Security Answer:

Reset Email

Enter Email Address:

Re-enter Email Address:

To reset the password, click the *checkbox* next to Reset Password

PAUSE

[Click on checkbox next to Reset Password](#)

In the *Old Password* field, enter your current password. In the *New Password* field, enter your new password. Then enter this same password in the *Confirm New Password* field.

- Passwords must have a length between 6 and 24,
- Passwords must contain only alphanumeric characters, and
- Passwords are case-sensitive.

To reset the security question, click the checkbox next to *Reset Security Question*

PAUSE

[Click on checkbox next to Reset Security Question](#)

Select a security question from the pull-down

PAUSE

[Click on Security Question drop down](#)

In the security answer field, enter the answer to the question you selected.
To reset the email, click the *checkbox* next to Reset Email.

PAUSE

[Click on checkbox next to Reset Email](#)

In the *Enter Email Address* field, enter your email address. In the *Re-enter Email Address* field, enter the same email address as a confirmation.

To save these changes, click the *Save* button.

To reset information entered on this screen, click the *Reset* button.

STOP

4. Employer Management

A. View/Update Employer information

1. Employer details (profile tab)
2. Review/Update Address information (profile tab)
3. Review/Update Contact information (contacts tab)

B. Point. Click. Remit.

1. Generate/Create Work Reports (generate work report tab)
2. View Work Reports (generate work report tab)
3. Edit/Process Work Reports (generate work report tab)
4. Generate/Create Adjustment Work Reports (generate work report tab)
5. View Adjustment Work Reports (generate work report tab)
6. Edit/Process Adjustment Work Reports (generate work report tab)
7. Review account transactions (transactions tab)
8. View payment history (payment history tab)
9. View current payments and debit transactions (payments tab)
10. View confirmation receipts (documents tab)

Employer Management

Employer Management

News and Alerts

- [View/Update Employer Information](#)
- [Point. Click. Remit.](#)

To demonstrate the power of V3's Employer Self Service, we will:

- View and update employer and contact information,
- Generate and process a regular and adjustment work report, Review the details of the work report,
- View the payment account, and finally
- View and print the confirmation receipts

4A. View/Update Employer information

1. Employer details (profile tab)
2. Review/Update Address information (profile tab)
3. Review/Update Contact information (contacts tab)

Now let's move on to the View and Update Employer Information link

PAUSE

[Click on View and Update Employer Information](#)

You may view the information the New England Carpenters Benefit Funds has on file for your organization, including:

- Employer name and code
- Address, phone, and e-mail information, and
- Contacts and their roles within your organization

Home » Employer Management » View/Update Employer

Profile Contacts

Employer Details

Employer ID: 12355
Employer Name: EMPLOYER 03

Address Information

Address Type: Primary Valid: Add
Address Start Date: May 28, 2009 Address Source: Employer

Employer Street Address 1: SOME ST
Employer Street Address 2:
Employer Street Address 3:
Country: UNITED STATES ZIP CODE: 07007-0000
City: CALDWELL
STATE: NEW JE County: ESSEX

Employer information is presented in two tabs:

- **On the Profile tab**, you may view the employer information the New England Carpenters Benefit Funds has on file for you. The employer's address information can be updated on this tab.
- **On the Contacts tab**, you may add, change, and delete your organization's contacts and their address information.

From the *Profile* tab, you may view your basic profile information and update your organization's address information.

While updating, you may click *Reset* to return to the original information (provided the changes have not been saved).

PAUSE

[Click Reset](#)

Update info, and then click *Save* to update changes.

PAUSE

[Click Save](#)

Changes made will be applied.

From the *Contacts* tab, you can view a list of contacts on file for your organization. From here, you can add and delete contacts.

Click on a *Name* to view the contact's information. The contact's role, contact information, and address information will be displayed below the Contacts list.

To add a new contact, click on the *Add Contact* link displayed on the top left side of the screen.

PAUSE

[Click Add Contact](#)

A new line appears where you can enter the contact's details below the Contacts list. Enter the contact *Role, Contact Information, and Contact Address.*

You may click *Reset* to have the information revert back to the last saved contact information.

PAUSE

[Click Reset](#)

Once you have entered the correct information, click *Save* to save the information.

PAUSE

[Click Save](#)

If you want to delete the contact, click the *Delete* button.

PAUSE

[Click Delete](#)

4B. Point. Click. Remit.

1. Generate/Create Work Reports (generate work report tab)
2. View Work Reports (generate work report tab)
3. Edit/Process Work Reports (generate work report tab)
 - a. Add existing member
 - b. Add new member
 - c. Delete member
 - d. Edit member details
 - e. Shortcut functions
 1. Select All
 2. Select None
 3. Copy
 4. Modify
 5. Search
 - f. View Summary

Let's continue by clicking on the *Point. Click. Remit.* link

PAUSE


[Click on Point. Click. Remit.](#)

The employer is presented with the *Generate Work Report* tab where Regular Adjustment work reports can be generated, viewed, and processed.

You must select the appropriate billing location (monthly or weekly) based on the period that the hours are being reported for. This is very important because the billing location indicates what agreement/area hours can be reported under.

- 4. Generate/Create Adjustment Work Reports (generate work report tab)
- 5. View Adjustment Work Reports (generate work report tab)
- 6. Edit/Process Adjustment Work Reports (generate work report tab)

Friday, November 20, 2009 | Welcome Mary Fuller | I Want To: Account Settings | Logout



NEW ENGLAND CARPENTERS BENEFIT FUNDS

12540 - ABC Company
[Change Employer]

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions Payment History Payments Documents

Billing Location: 12540 ABC Company - Monthly | [Generate Work Report](#) [Adjustment](#)

Work Reports

Report Status: All Report Type: All Show Converted Reports:

Edit Work Report Submit Delete

Controls Sort View Row Records Print Export

Date Submitted	Report Type	Report Status	Date Released	User Released	Report Start Date	Identifier	Trans#	Total Due	Total Balance
11/20/2009	Regular	Initial	//		11/01/2009			\$0.00	\$0.00
10/17/2009	Adjustment	Prebill	//		06/01/2009	June 2009 Adjustment	16597610	\$108.60	\$108.60
10/17/2009	Regular	Prebill	//		10/01/2009	2009-10 NERCC Eastern	16597607	\$6,339.20	\$6,339.20
10/17/2009	Regular	Prebill	//		10/01/2009	2009-10 NERCC Boston	16597606	\$0.00	\$0.00
10/16/2009	Regular	Prebill	//		09/01/2009	2009-09 NERCC Boston	16597602	\$0.00	\$0.00
10/16/2009	Regular	Prebill	//		09/01/2009	2009-09 NERCC Eastern	16597603	\$0.00	\$0.00
10/16/2009	Adjustment	Prebill	//		03/01/2009	Adjust March 2009 BOS Hours	16597598	\$0.00	\$0.00
07/05/2009	Regular	Released	07/07/2009	vpatel	06/01/2009	2009-06 NERCC Eastern	16597591	\$6,170.50	\$0.00
07/04/2009	Regular	Released	07/07/2009	vpatel	06/01/2009	2009-06 NERCC Boston	16597590	\$7,623.20	\$0.00

All work and work adjustment reports will initially be set in Initial status and once all the hours have been Entered, the employer user will need to hit the Submit button to set the work report to Prebill status. The Work report will remain in Prebill status until they are finalized and released to the New England Carpenter Benefit Fund.

To begin, we will click on *Generate Work Report* to generate a regular work report.

PAUSE

[Click Generate Work Report](#)

The resulting window displays the *Generate Work Report* screen; here you may select the report start date, stop date, and the source of the report for the related agreement.

Generate Work Report - Windows Internet Explorer

Employer: [REDACTED] Billing Location: [REDACTED] Save Cancel

Agreement

+ Controls

<input type="checkbox"/>	Agreement Name	Date Received	Report Start Date	Report Stop Date	Report Source
<input checked="" type="checkbox"/>	Floorcoverers		09/01/2009	//	
<input checked="" type="checkbox"/>	Millwrights		09/01/2009	//	
<input checked="" type="checkbox"/>	NERCC Boston	09/01/2009	10/01/2009	//	
<input checked="" type="checkbox"/>	Northern New England	11/01/2007	12/01/2007	//	
<input checked="" type="checkbox"/>	Piledrivers		09/01/2009	//	
<input checked="" type="checkbox"/>	NERCC Eastern	01/01/2010	02/01/2010	//	
<input checked="" type="checkbox"/>	Western Mass	09/01/1997	10/01/1997	//	
<input checked="" type="checkbox"/>	Woodframers		09/01/2009	//	

If you wish to change the Report Start date from the default start date because of skipped work periods you can update the start date. Once the start date is changed, a popup validation window displays; here you must acknowledge the change in the period by clicking OK or Cancel out to revert back to the original default start date.

Windows Internet Explorer

By selecting this date, you are confirming that you had zero hours to report for work periods prior to this date.

OK Cancel

PAUSE

[Click OK or Cancel](#)

PAUSE

[Click Save](#)

Once saved, the popup displays green check boxes notifying you of the successful work report generation for the chosen agreements.

PAUSE

[Click Close](#)

Notice that the work report file we just generated now appears as a new transaction in the *Generate Work Report* tab.

We select the new file, and click *Edit Work Report* to update and add member work report information. Please note that the *Rate* and *Local* fields are populated once the work report has been saved.

PAUSE

[Click Edit Work Report](#)

Work Report Editor - Windows Internet Explorer

Employer: [REDACTED] Billing Location: [REDACTED] Save Cancel

Filter

Billing Location: [REDACTED] Report Status: Prebill Trans#: 16597452
 Agreement: NERCC Eastern Date Released: // Type: Work Report
 Job Category: All User Released: Identifier: 2010-01 NERCC Eastern
 Report Start Date: 01/01/2010 Report Stop Date: 01/31/2010 Date Received: // Report Source: Employer
 Report Status Override: [REDACTED]

Member Count: 2 Row Count: 3

Controls

Add Copy Add New Modify View Row Payment Details View Summary Except. Report \$00 Records Exceptions: None
 Member Pay View Report Search Clear Search Sort By: Entry Order

Create Work Report

	SSN	Name	Start Date	Stop Date	Small Desc	Hours	Total Rate
<input type="checkbox"/>	[REDACTED]	THIBERT, MICHAEL P	01/01/2010	01/31/2010	ACT	0	17.27
<input type="checkbox"/>	[REDACTED]	THIBERT, MICHAEL P	01/01/2010	01/31/2010	ACT	0	17.27
<input type="checkbox"/>	[REDACTED]	BLAKE, MATTHEW	01/01/2010	01/31/2010	ACT	23	24.6
Page Totals:						23	
Report Totals:						23	

The employer is presented with the details of the work report. The employer may then add new members, edit existing data, and enter the period hours.

The employer must select the City/Town where the work is being performed to register the Worked Local. There are cases when hours are being reported for certain agreements, i.e. the Floorcoverers or Piledrivers. In these cases, the City Floorcoverers or Piledrivers should be selected from the City drop-down selection box to register the correct Local.

The work report is generated in template format, which means that all members on the last released work report for the agreement appear on the newly generated Prebill work report. This simplifies the data entry process for a quicker turnaround time.

Certain function buttons are available to the employer for simplifying data entry, such as *Copy*, *Modify*, *Select all*, *Select none* and *Search*.

These functions allow the employer to make any required corrections before submitting the work report to you, thus ensuring that users spend as little time as possible reconciling and correcting work reports.

A caution sign means that there is a possible exception. You can click on the Caution sign for an explanation of the warning.

To add an existing member on the *Work Report Editor* screen, select job category, and then click *Add*.

PAUSE

[Click Add](#)

Clicking add opens up a new line at the top of the Work History list. Enter the social security number or name for the existing member in the SSN field, and then press *Enter* or *Tab*. A search screen appears where you can select an existing member.

The screenshot shows the 'Work Report Editor' web application in a Windows Internet Explorer browser. The interface includes a header with 'Employer:' and 'Billing Location:' fields, and 'Save' and 'Cancel' buttons. Below this is a 'Filter' section with various dropdown menus and date pickers for 'Billing Location', 'Agreement' (set to 'NERCC Eastern'), 'Job Category' (set to 'Journeyman'), 'Report Start Date' (01/01/2010), and 'Report Stop Date' (01/31/2010). Other filter options include 'Report Status' (prebill), 'Date Released', 'User Released', 'Date Received', 'Report Status Override', 'Trans#' (16597452), 'Type' (Work Report), 'Identifier' (2010-01 NERCC Eastern), and 'Report Source' (Employer). The 'Member Count' is 2 and 'Row Count' is 4. A 'Controls' section contains buttons for 'Add', 'Copy', 'Add New', 'Modify', 'View Row', 'Payment Details', 'Member Pay', 'View Summary', 'View Report', 'Except. Report', 'Search', 'Clear Search', and '500 Records'. It also includes 'Exceptions' (None) and 'Sort By' (Entry Order) dropdowns. At the bottom, a 'Create Work Report' table is visible with columns for SSN, Name, Start Date, Stop Date, Small Desc, Hours, and Total Rate. The first row in the table has the SSN field highlighted in yellow.

PAUSE

[Enter an SSN, press Enter, and then select an existing member from the search results](#)

Enter the required work report information by scrolling to the right for the member's entry in the work report.

PAUSE

[Enter information for the member](#)

To add a new member to the work report, select job category, and then click *Add New...*

PAUSE

[Click Add New](#)

This opens a pop-up window where you can create a new member in V3.

Enter the required member information, and then click *OK*.

Add New Member

Prefix: First Name: Middle Initial: Last Name: Suffix:

SSN: Birth Date: Gender: Female Male

OK Cancel

PAUSE

[Enter the information, and then click OK](#)

A new row is added to the Work History grid for the member that you just created.

Enter the required work report information by scrolling to the right for the member's entry in the work

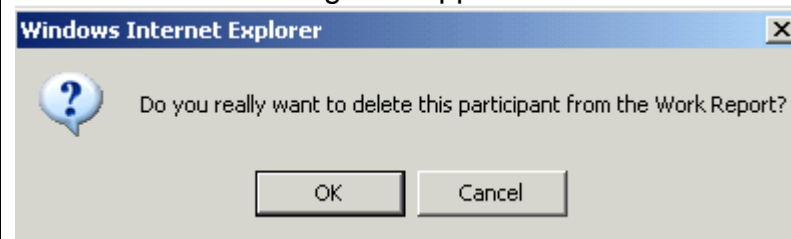
report.

To delete a member, click the 'x' image in the row you want to delete.

PAUSE

[Click 'X'](#)

A confirmation message will appear. Click OK to confirm the deletion of the work report row.



PAUSE

[Click OK to delete the row](#)

If you decide to proceed, the record will be deleted.

The Work History Summary provides you with two types of summaries:

- Totals by Agreement Name and Job Category
- Totals by Fund Contributions

To view the Work History Summary, click *View Summary*.

PAUSE

[Click View Summary](#)

The Work History Summary and a Cash Summary are displayed. The summaries recap the billing

history on the *Work Report Editor* screen.

Work Report Editor - Windows Internet Explorer

Employer: [Redacted] Billing Location: [Redacted] Save Cancel

Filter

Billing Location: [Redacted] Report Status: Prebill Trans#: 16597452
 Agreement: NERCC Eastern Date Released: // Type: Work Report
 Job Category: All User Released: Identifier: 2010-01 NERCC Eastern
 Report Start Date: 01/01/2010 Report Stop Date: 01/31/2010 Date Received: // Report Source: Employer
 Report Status Override: [Redacted]

Member Count: 2 Row Count: 3

Work History Summary

View Details Show Basis Show Funds Show Fund Details

Agreement	Job Category	Pension	Annuity	Health	Misc	ATF	Advance	Internat	Funds Total
<input checked="" type="checkbox"/> NERCC Eastern	Journeyman	155.480	177.100	168.590	54.740	3.450	1.150	1.840	565.800
<input checked="" type="checkbox"/> NERCC Eastern	Manual 1st Yr Apprentice	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
		155.480	177.100	168.590	54.740	3.450	1.150	1.840	565.800

Cash Summary

Fund	Due	Paid	Balance
NECARP Pension Fund	155.480	0.000	155.480
NECARP Guar Annuity Fund	177.100	0.000	177.100
NECARP Health Fund	168.590	0.000	168.590
Dues	31.280	0.000	31.280
Carpenters Vacation Fund	8.970	0.000	8.970
ATF	3.450	0.000	3.450
Carp Labor-Mgmt Prog	4.140	0.000	4.140
Market Opportunity Fund	4.600	0.000	4.600
NECARP Training Fund	5.750	0.000	5.750
Mass Const	1.150	0.000	1.150

Click the + sign to show the member work history under an **Agreement Name** and **Job Category**.

Work History Summary

View Details Show Basis Show Funds Show Fund Details

Agreement	Job Category	Pension	Annuity	Health	Misc	ATF	Advance	Internat	Funds Total		
<input checked="" type="checkbox"/> NERCC Eastern	Journeyman	155.480	177.100	168.590	54.740	3.450	1.150	1.840	565.800		
Jan 1, 2010	BLAKE, MATTHEW	XXX-XX-1111	Active	155.480	177.100	168.590	54.740	3.450	1.150	1.840	565.800

PAUSE

[Click +](#)

The Work History Summary displays the total for each **Agreement Name** and **Job Category**. You can change the display by checking the following boxes to display the related data column:

- **Show Basis**—Check this box to show the summarized hours data.
- **Show Funds**—Check this box to show the summarized funds total data.
- **Show Fund Details**—Check this box to show the summarized fund detail data. This will display a separate total of the calculated contributions for each member.

Click *View Details* to return to the detailed Work History.

PAUSE

[Click View Details](#)

When the editing is complete, click *Save* to commit your changes and close the Work Report Editor screen to return to the *Generate Work Report* tab.

PAUSE

[Click Save, close the Work Report Editor screen, and return to the Generate Work Reports tab](#)

The work report automatically calculates the total due amount and populates the Local and Rate based on the hours and city entered for the members by job category. This is shown in the Total Due column in the Initial work report line item on the *Generate Work Report* tab.

Once all hours have been entered for the work report, click *Submit* to complete the processing of the work report. This will set the status of the work report to Prebill.

PAUSE

[Click Submit](#)

The employer can now make their related payments through the bank or by sending a certified check to the Fund.

Once full payment is received by the fund office, the work reports are released. Upon release, the employer receives an email notifying them of confirmation receipts are available on *Employer Self Service* for printing.

After a work report is released, the only way to make a correction is to create a work adjustment report.

To create a new work adjustment, click *Adjustment on the Generate Work Report* tab.

PAUSE

[Click Adjustment](#)

The resulting window displays the *Generate Adjustment* pop-up screen, where we must enter the report start date, stop date, date received and source of the report for the agreement and period for which the adjustment work report is being generated.

<input type="checkbox"/>	Agreement Name	Report Start Date	Report Stop Date	Trans Identifier	Report Source	Date Received
<input checked="" type="checkbox"/>	Floorcoverers	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	Millwrights	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	NERCC Boston	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	Northern New England	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	Piledrivers	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	NERCC Eastern	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	Western Mass	09/28/2009	09/28/2009			//
<input checked="" type="checkbox"/>	Woodframers	09/28/2009	09/28/2009			//

PAUSE

[Click Save](#)

Once saved, the popup displays green check boxes, notifying us of the successful generation of work reports for the agreements chosen.

PAUSE

[Click Close](#)

Notice that the work report adjustment file we just generated now appears as a new transaction on the *Generate Work Report* tab.

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions Payment History Payments

Billing Location: [REDACTED] | Generate Work Report Adjustment

Work Reports

Report Status: All Report Type: All Show Converted Reports:

Edit Work Report Release Delete

Controls Sort View Row Records Print Export

Date Submitted	Report Type	Report Status	Date Released	User Released	Report Start Date	Identifier	Trans#	Total Due	Total Balance
09/28/2009	Adjustment	Prebill	//	User Released	08/01/2009	Adjust August BOSTON 2009 Report	16597501	\$0.00	\$0.00

Now, we'll select the new adjustment file, and click *Edit Work Report* to update and add member adjustment work report information.

PAUSE

[Click Edit Work Report](#)

The *Work Report Editor* screen appears. The information may be edited as necessary; pull in the original regular work report information by clicking *Load Priors*.

PAUSE

[Click Load Priors](#)

Work Report Editor - Windows Internet Explorer

Employer: [Redacted] Billing Location: [Redacted] Save Cancel

Filter

Billing Location: [Redacted] Report Status: Prebill Trans#: 16597501
Agreement: NERCC Boston Date Released: // Type: Work Report Adj.
Job Category: All User Released: Identifier: Adjust August BOSTON 2009 Report
Report Start Date: 08/01/2009 Report Stop Date: 08/31/2009 Date Received: 09/28/2009 Report Source: Employer
Contribution Period: Aug 1, 2009 - Aug 31, 2009 Report Status: [Redacted] Override: [Redacted]
Add
Member Count: 0 Row Count: 0

Controls

Member: [Redacted] Copy Payment Details View Summary Except. Report 500 Records Exceptions: None
Add Load Priors Member Pay View Report Search Clear Search Sort By: Entry Order
Add New Modify View Row

Create Work Report

<input type="checkbox"/>	SSN	Name	Agreement Name	Job Category	Small Desc	Hours	Total Rate	City	LOCAL	Lay-Off	NOF
Page Totals:						0					
Report Totals:						0					

Enter your adjustment in the *Adjustment* field in the highlighted *Hours* column.

Click *Save* to save your changes. You will return to the *Generate Work Report* tab.

PAUSE

[Click Save](#)

The adjustment work report automatically calculates the total due amount and populates the Local and Rate based on the hours and city entered for the members per job category. This is shown in the total due column on the Initial adjustment work report line item.

Once all hours have been entered for the work report, click *Submit* to complete the processing of the work report. This will set the status of the work report to Prebill.

PAUSE

[Click Submit](#)

The employer may now make related payments through the bank or by sending a certified check to the Fund.

PAUSE

- 4B. Point. Click. Remit.**
7. Review account transactions (transactions tab)
a. View transaction detail
b. Filter transactions

[Click on the Transactions tab](#)

The *Transactions* tab displays the balance of your account. The default view displays all of the open transactions in your account.

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions Payment History Payments

Billing Location: [REDACTED]

Criteria

View: Default Add Save Delete

Trans Status: Open Trans Types: All Activity Start: / / Activity Stop: / /

Fund Columns: Fund Groups Totals: Totals Reporting Agency: All Trans#: [REDACTED]

Filter Clear

Transactions

View Trans.

Trans#	Date Submitted	Status	Type	Identifier	Activity Date	Pension	Annuity	Health	PAC	ATF	Misc	Advance	Total Balance
16597501	09/28/2009	Open	Work Report Adj.	Adjust August BOSTON 2009 Report	09/28/2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
16597452	09/23/2009	Open	Work Report	2010-01 NERCC Eastern	01/01/2010	\$155.48	\$177.10	\$168.59	\$0.00	\$3.45	\$54.74	\$1.15	\$565.
16597449	09/23/2009	Open	Work Report	2009-12 NERCC	12/01/2009	\$452.92	\$515.90	\$491.11	\$0.00	\$10.05	\$159.46	\$3.35	\$1,648.

The Show section controls the transaction display. Click *Filter* to display the transactions that meet the

criteria you entered.

PAUSE

[Click Filter](#)

Click *Clear* to remove your entries and return to the default criteria.

PAUSE

[Click Clear](#)

The Transactions section displays all transactions that meet the filter criteria entered. You may also view a transaction in more detail by highlighting the transaction and then clicking *View Trans*.

Please note that a balance forward open transaction will show all of your previous purchases.

PAUSE

[Click View Trans](#)

The details of the transaction you highlighted are displayed. The transaction Activity Date, Type, and Identifier are displayed, along with all applicable funds, their due amounts, and total amounts.

Transaction Details - Windows Internet Explorer

Transaction

Trans#: 16597452
 Type: Work Report
 Identifier: 2010-01 NERCC Eastern
 Trans Analyst:
 Contribution Date: / /
 Transaction Process Code:

Transaction Status

Inserted By: MARY
 Updated By: MARY
 Status: Open

Interest

Due Date: 03/01/2010
 Apply Interest:
 Interest Type: Fee

Show Fund Group Details

+ Controls									
Approval Required	Activity Date	Type	Identifier	PAC	ATF	Misc	Advance	Total Amount	
✓	01/01/2010	Original	2010-01 NERCC Eastern	\$0.00	\$3.45	\$54.74	\$1.15	\$565.80	\$565.80

4B. Point. Click. Remit.
 8. View payment history (payment history tab)

The *Payment History* tab displays all checks and EFT payments posted to your account by the New England Carpenters Benefit Fund.

Please note that the *Payment History* tab is view only. The default view displays *Open* payments.

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions **Payment History** Payments

Billing Location: [Dropdown]

Payments

[Open] [Dropdown]

To view *All* or *Closed* Payments, select from the drop-down selection box.

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions Payment History **Payments**

Billing Location: [Dropdown]

Payments

[Closed] [Dropdown]

Deposit Date	Batch No	Payment Type	Check No	Check Account No	Check Aba No	Fund	Payment Amount	Remaining Amount
09/23/2009		Check	459			NECARP Holding Fund	\$259.80	\$0.00
09/22/2009		Check	205			NECARP Holding Fund	\$4,633.80	\$0.00

PAUSE

Select All to view all payments

4B. Point. Click. Remit.
9. View current payments and debit transactions (payments tab)

The *Payments* tab allows you to view open payments and open debit transactions. Please note that the *Payments* tab is view only.

The default view displays *Open* payments and *Open* debit transactions.

Expand	Trans#	Activity Date	Type	Identifier	Fund	Due Amount	Paid Amount	Total Balance
<input type="checkbox"/>	16597452	Jan 1, 2010	Work Report	2010-01 NERCC Eastern	Totals	\$565.80	\$0.00	\$565.
<input type="checkbox"/>	16597449	Dec 1, 2009	Work Report	2009-12 NERCC Eastern	Totals	\$1,648.20	\$0.00	\$1,648.
<input type="checkbox"/>	16597413	Oct 1, 2009	Work Report	2009-10 NERCC Eastern	Totals	\$4,475.22	\$0.00	\$4,475.

Please note that a balance forward of your previously made purchases will show as a credit item in the payments tab.

To view *Closed* payments, select the radio button in the criteria section and click on *Show*

PAUSE

Select Closed radio button, and then click Show

All *Closed* payments will display under the Payments section

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions Payment History **Payments**

Billing Location: [REDACTED]

Criteria

Open Payments:

Closed Payments: Show

Payments

Add Transfer Cancel

+ Controls

Trans#	Deposit Date	Received Date	Batch No	Payment Type	Check No	Check Account No	Check Aba No	Fund
16597453	09/23/2009	09/23/2009		Check	459			NECARP Holding Fund
16597443	09/22/2009	09/22/2009		Check	205			NECARP Holding Fund

Save Reset

4B. Point. Click. Remit.
10. View confirmation receipts
(documents tab)

The *Documents* tab allows you to view and print your work report confirmation receipts. Once the work report is released, you will receive an email notifying you that your confirmations are ready to be viewed and printed.

Please note that the *Documents* tab is view only.

Home » Employer Management » Point. Click. Remit.

Generate Work Report Transactions Payment History Payments Documents

Billing Location: [REDACTED]

Documents

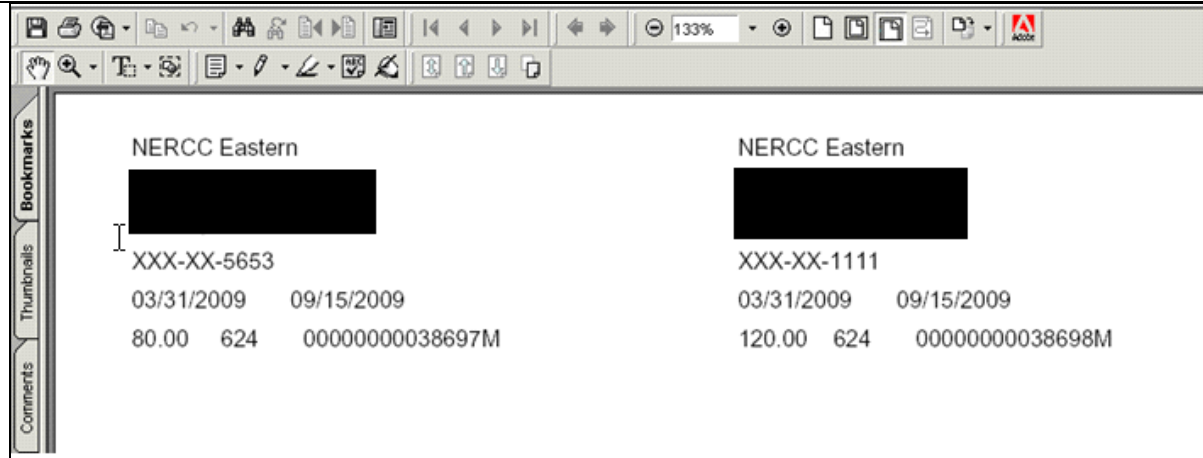
Controls					
Create Date	Type	Status	Recipient	Mailed To	View Document
09/15/2009 09:57	Work_Report_Confirmation_Receipt	Printed	[REDACTED]		
09/15/2009 09:57	Work_Report_Confirmation_Receipt	Printed	[REDACTED]		

Click on the *PDF icon* to view and print the confirmation receipts.

PAUSE

[Click PDF icon](#)

Work report confirmation receipts are displayed and may be printed.



STOP

Closing

That concludes the demonstration. We hope that you enjoyed this tutorial and it was a helpful overview of V3's Employer Self Service functionality. Please contact the Fund Office if you should have any further questions or concerns.