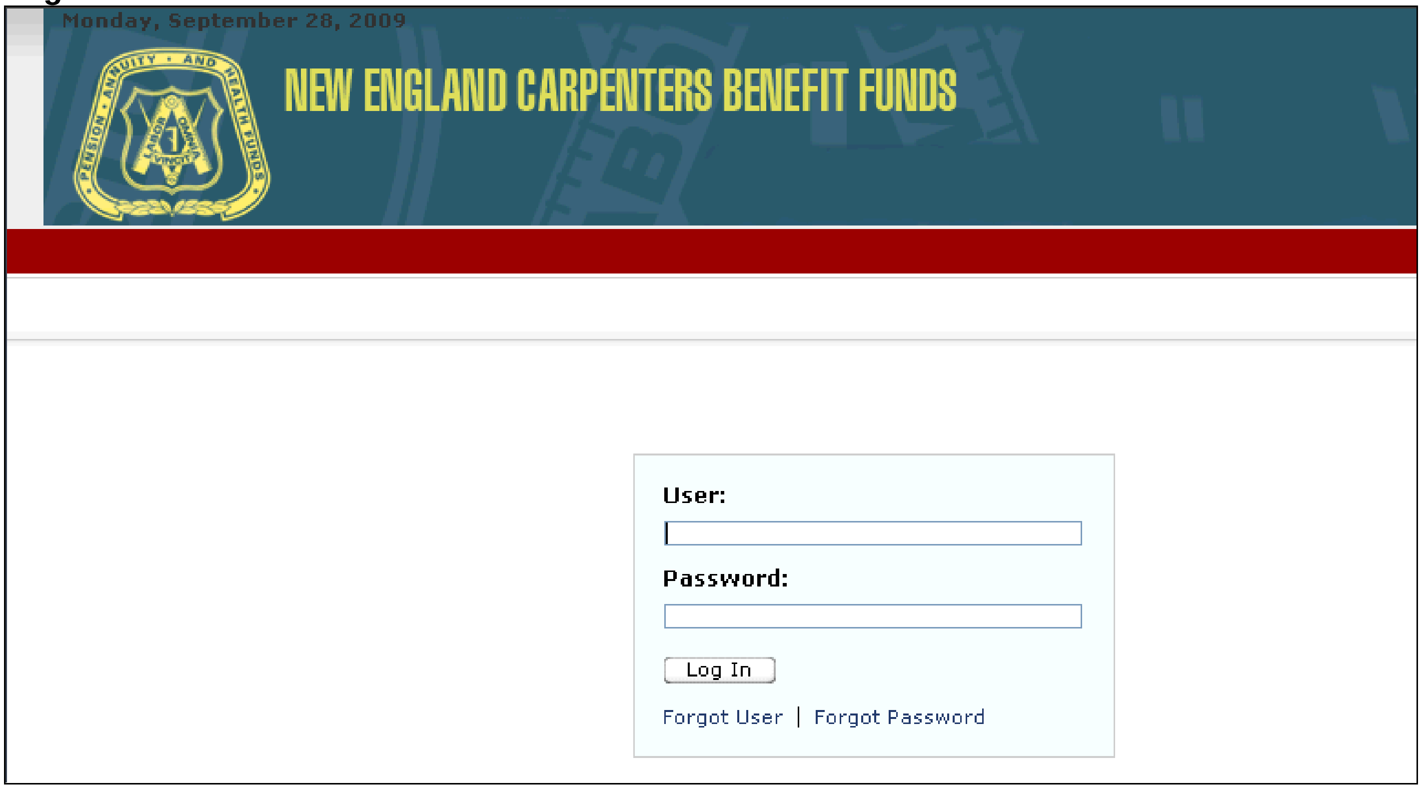
Introduction	**WELCOME** Welcome to the V3 User Experience Employer Self Service Demonstration. Please note that you may select specific topics via the demonstration menu, or you may view the demonstration in its entirety. The Employer Self Service Tutorial is for demonstration purposes only, and may not include updates to the application. Please contact the fund office if you need assistance. **STOP**
Overview	**V3 OVERVIEW** 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. We will begin the demonstration by logging in to the system. **PAUSE** **Username** **Password** **Login** **STOP**
1. Login 1. Login to V3 2. Forgot Username 3. Forgot Password 4. Initial reset of password and setting security question	**V3 Employer SS** **START WITH SCREEN ON EMPLOYER SELF SERVICE** V3 Employer Self Service allows employers to interact with your organization using a secure, Web-based V3 application.

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



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 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.

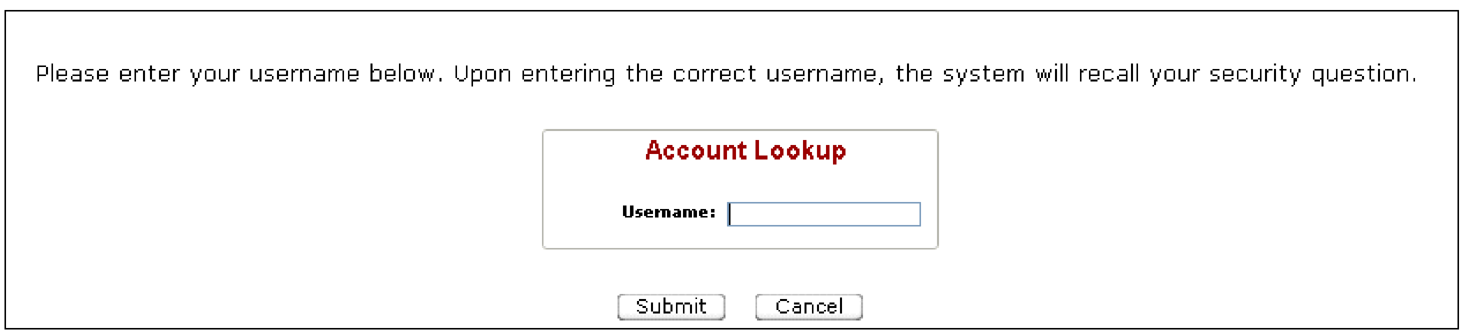
PAUSE

Click on Cancel button

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

PAUSE

Click on Forgot Password link



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

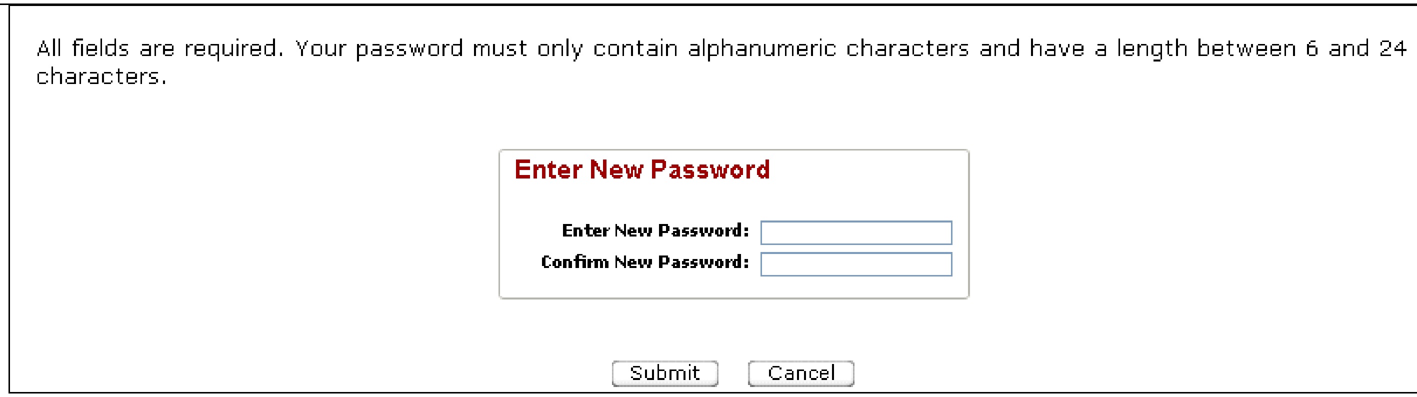
Enter the correct answer to the security question. Please note that the answer to the security question is NOT case-sensitive.

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

PAUSE

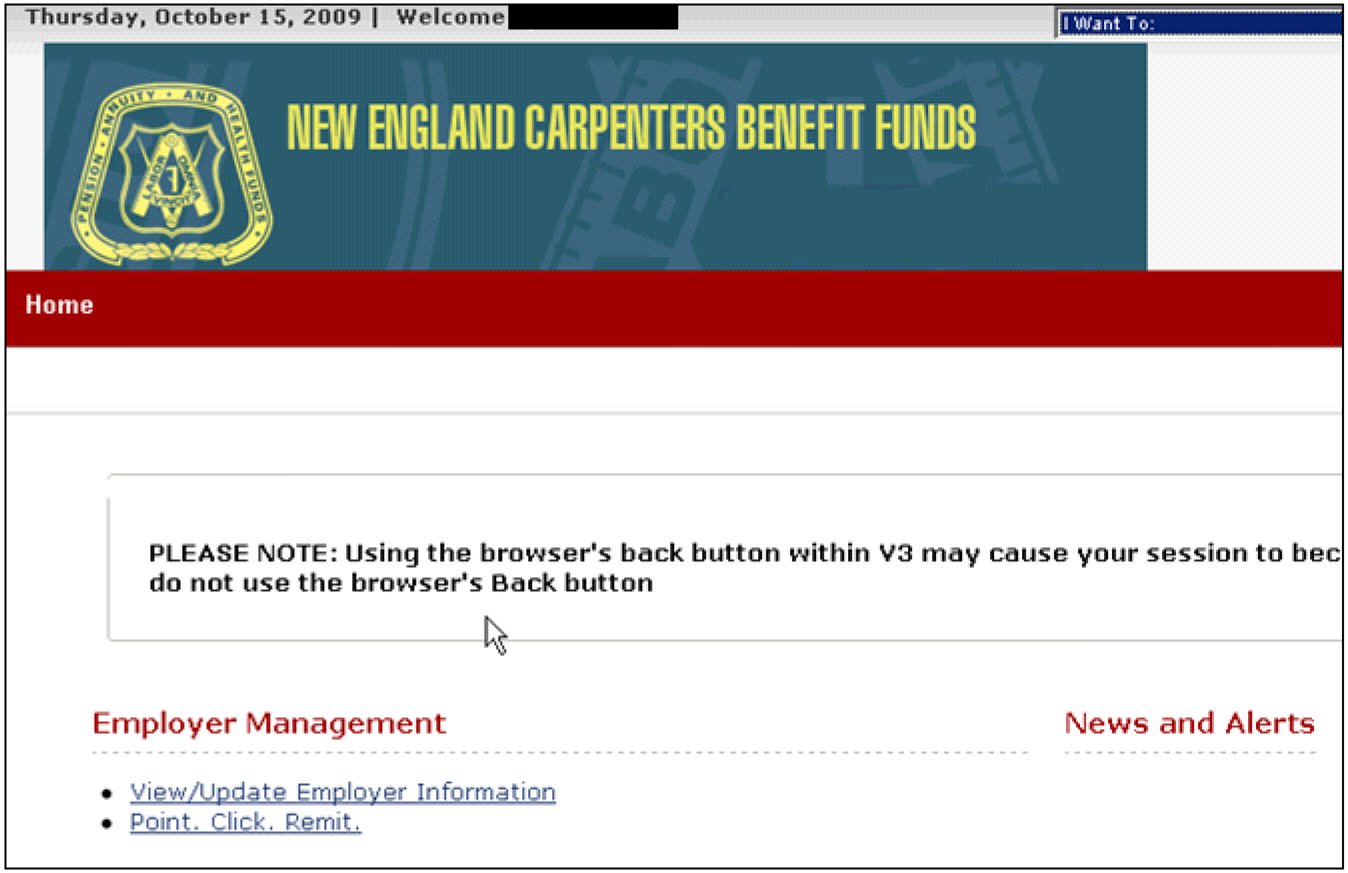
Enter color in the Answer box, and then hit Submit

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

	 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**

	<u>Location Path:</u> 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* <u>Navigation Area:</u> 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** <u>News and Alerts:</u> *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

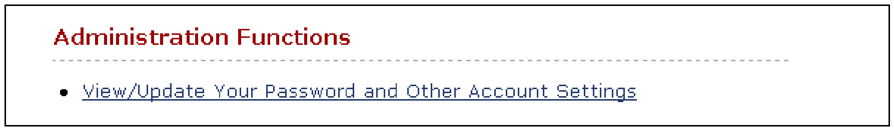
1. Reset Password
2. Reset Security Question
3. Reset Email

Administrative Functions

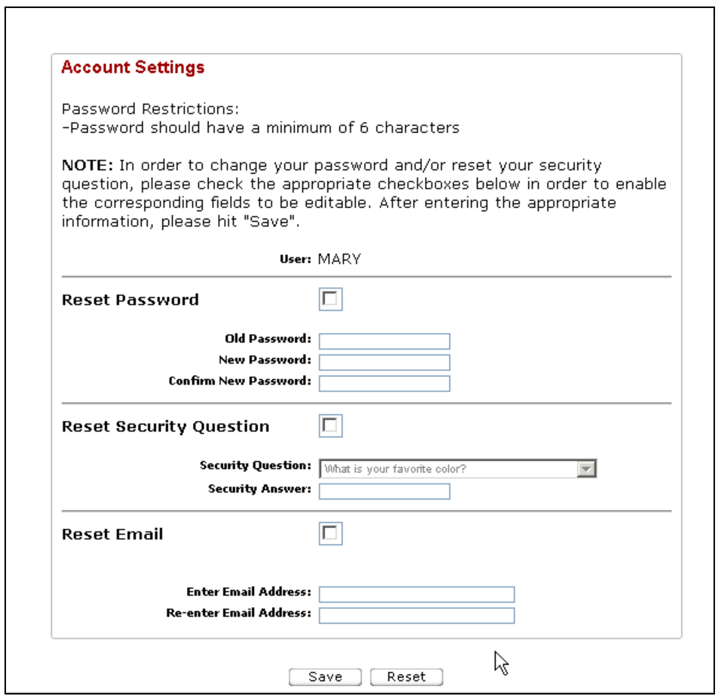
Let’s look more closely at administrative functions. Administrative functions allow employers to view and update their password and other account settings (such as their security question and Email address).

PAUSE

Click on View/Update Your Password and Other Account Settings



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



	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**

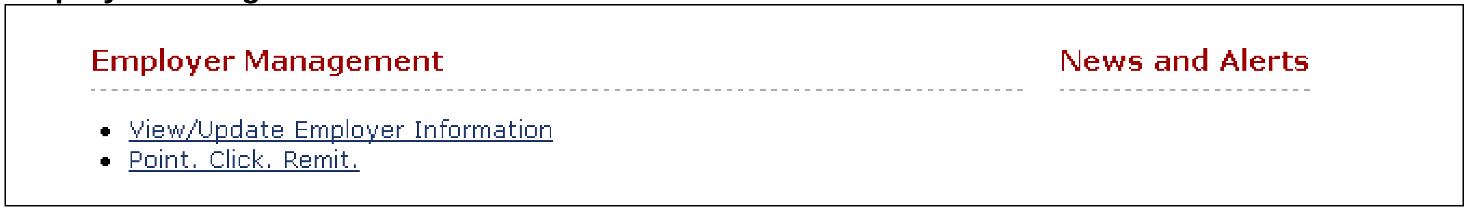
	In the *Enter Email Address* field, enter your email address. In the *Re-enter Email Address* field, enter the same email address as a confirmation. To save these changes, click the *Save* button. To reset information entered on this screen, click the *Reset* button. **STOP**

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



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)

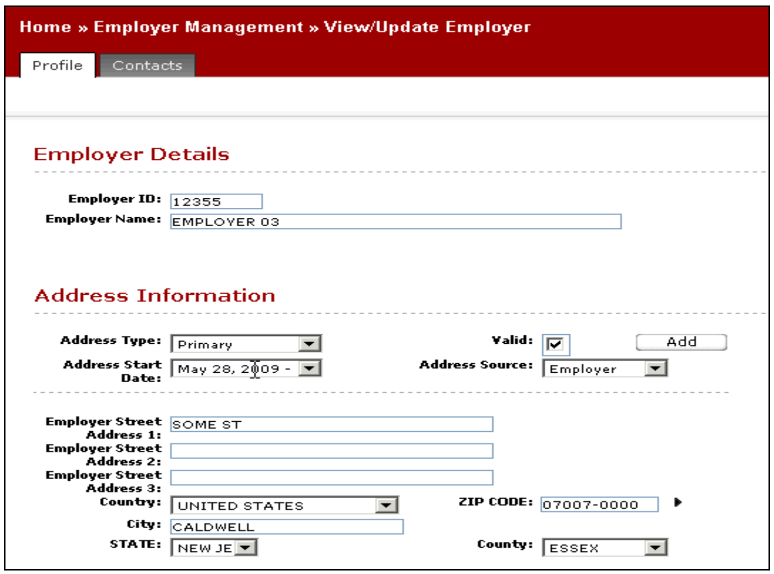
Now let's move on to the View and Update Employer Information link

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



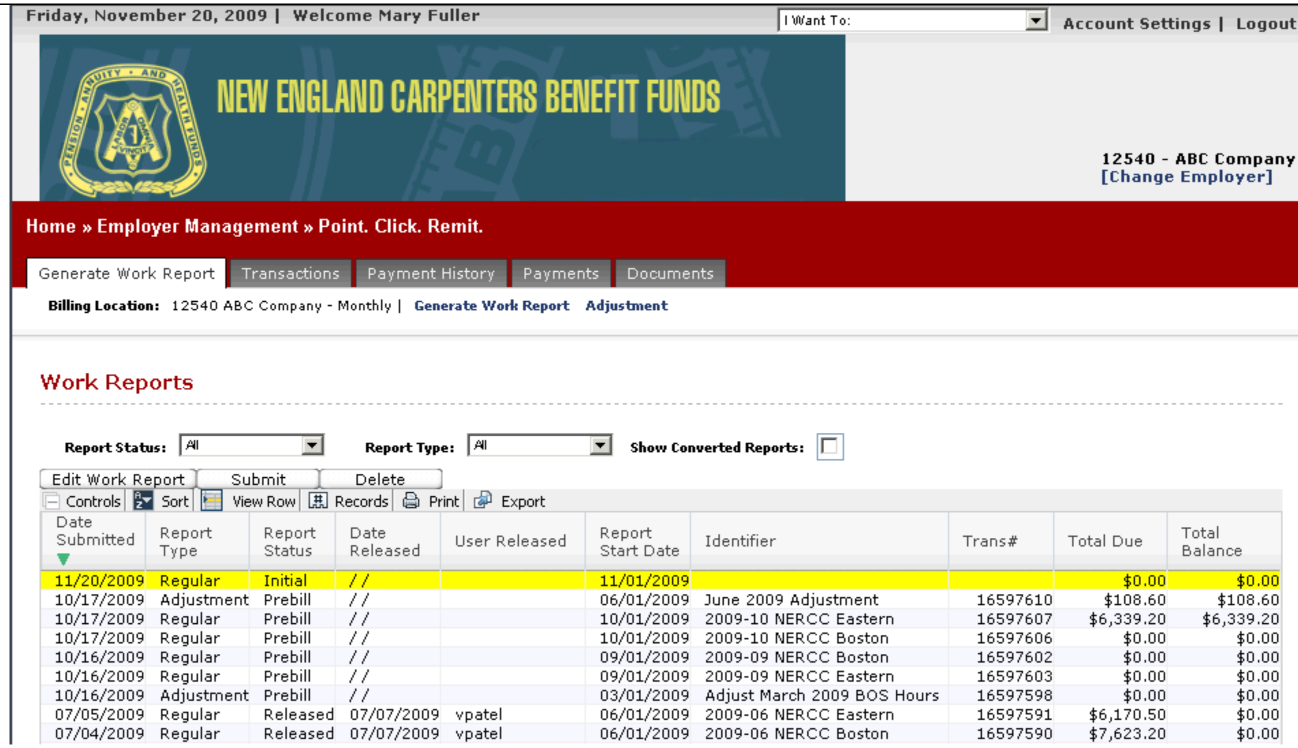
Employer information is presented in two tabs:

- ***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)



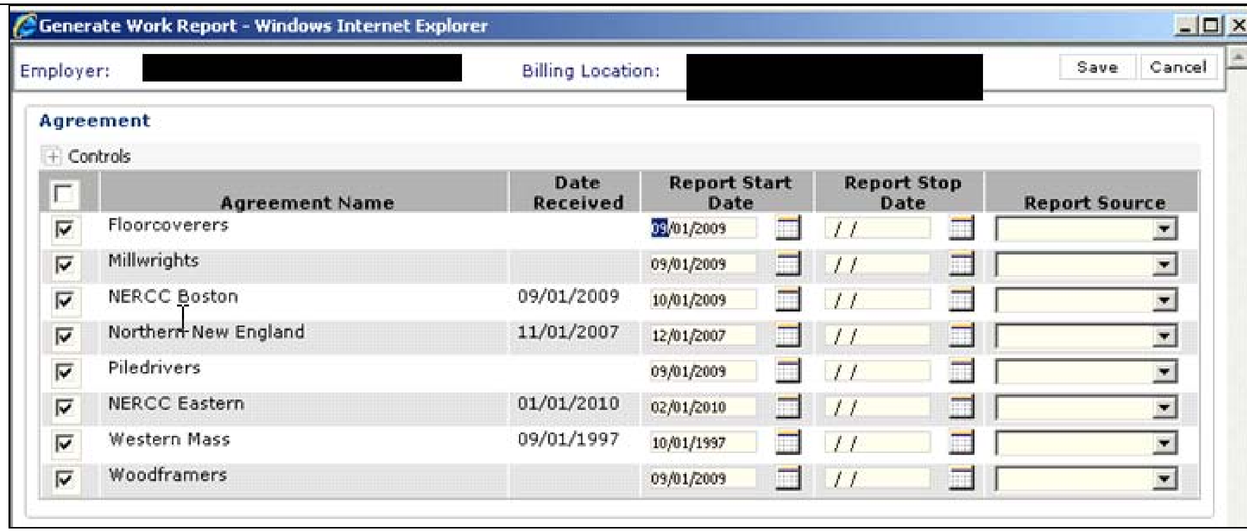
All work and work adjustment reports will initially be set in Initial status and once all the hours have been Entered, the employer user will need to hit the Submit button to set the work report to Prebill status. The Work report will remain in Prebill status until they are finalized and released to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

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

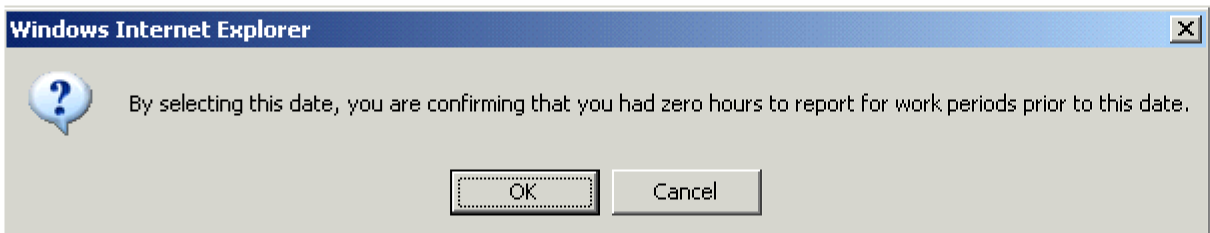
PAUSE

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.



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.



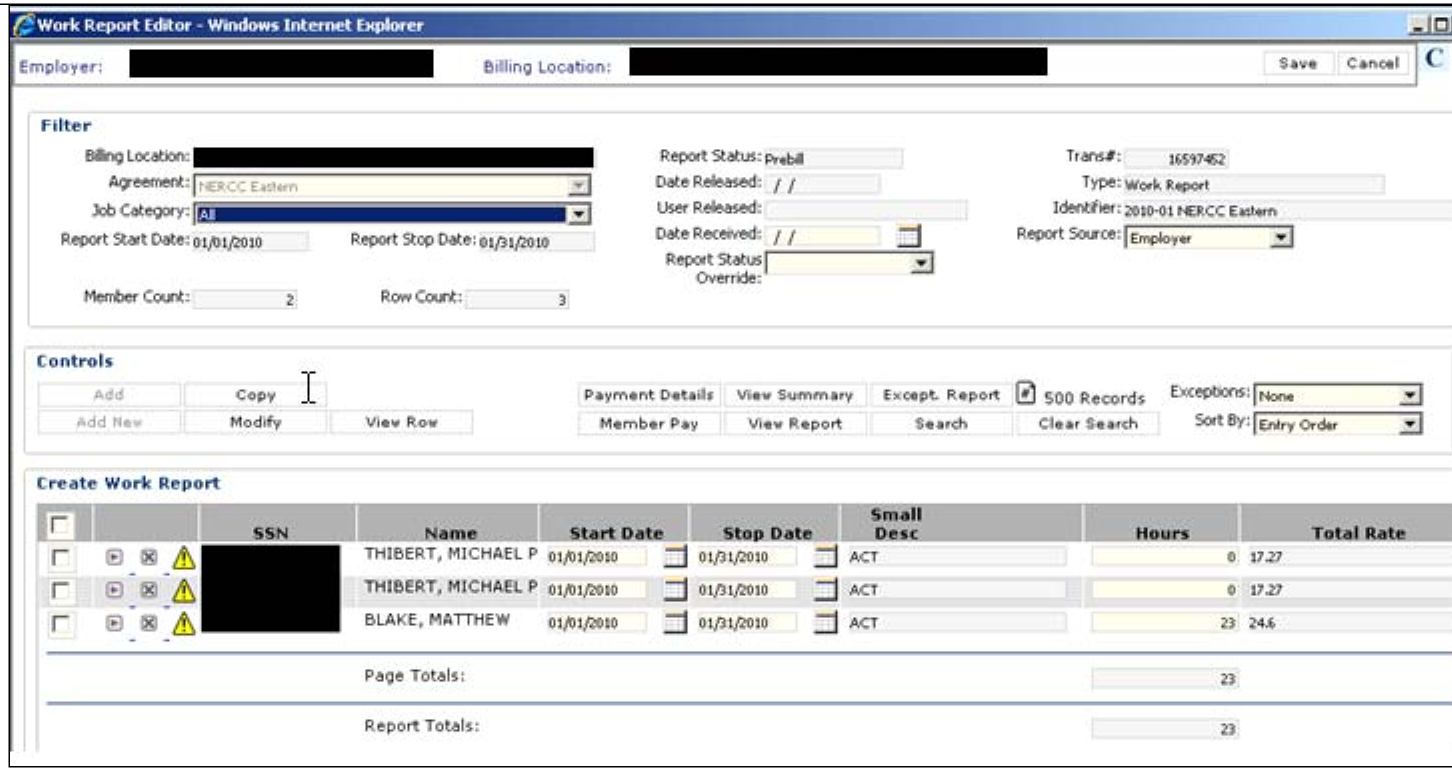
PAUSE

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**



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.

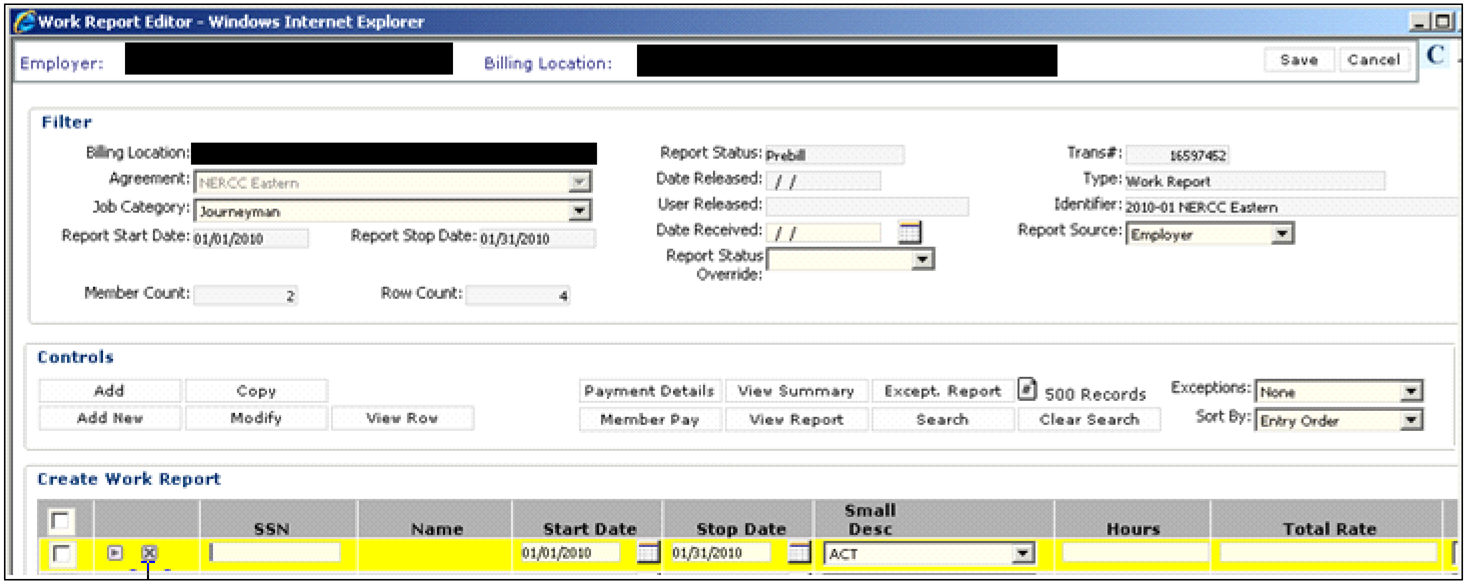
A caution sign means that there is a possible exception. You can click on the Caution sign for an explanation of the warning.

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.



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

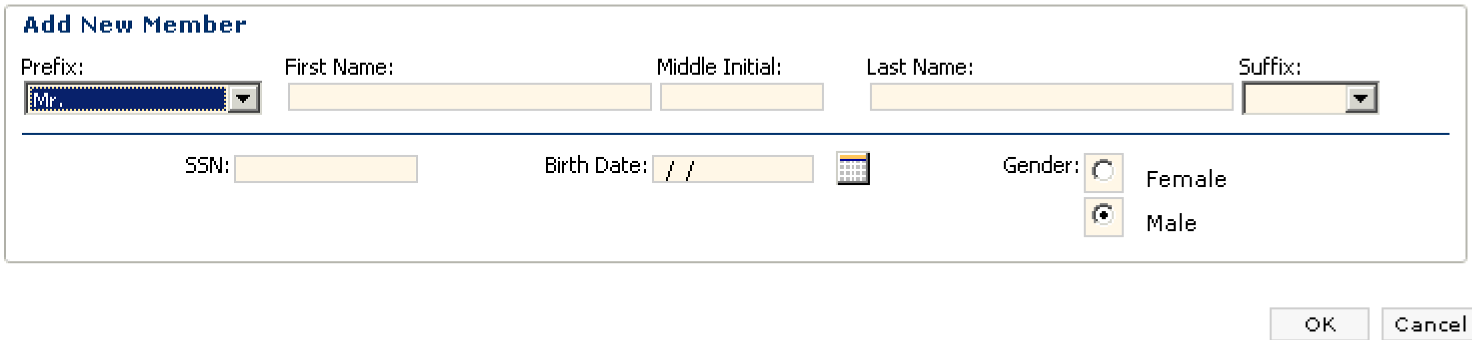
To add a new member to the work report, select job category, and then click *Add New*…

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*.



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.

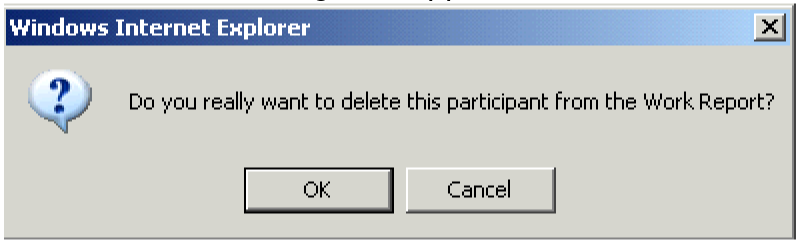
Enter the required work report information by scrolling to the right for the member's entry in the work report.

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.

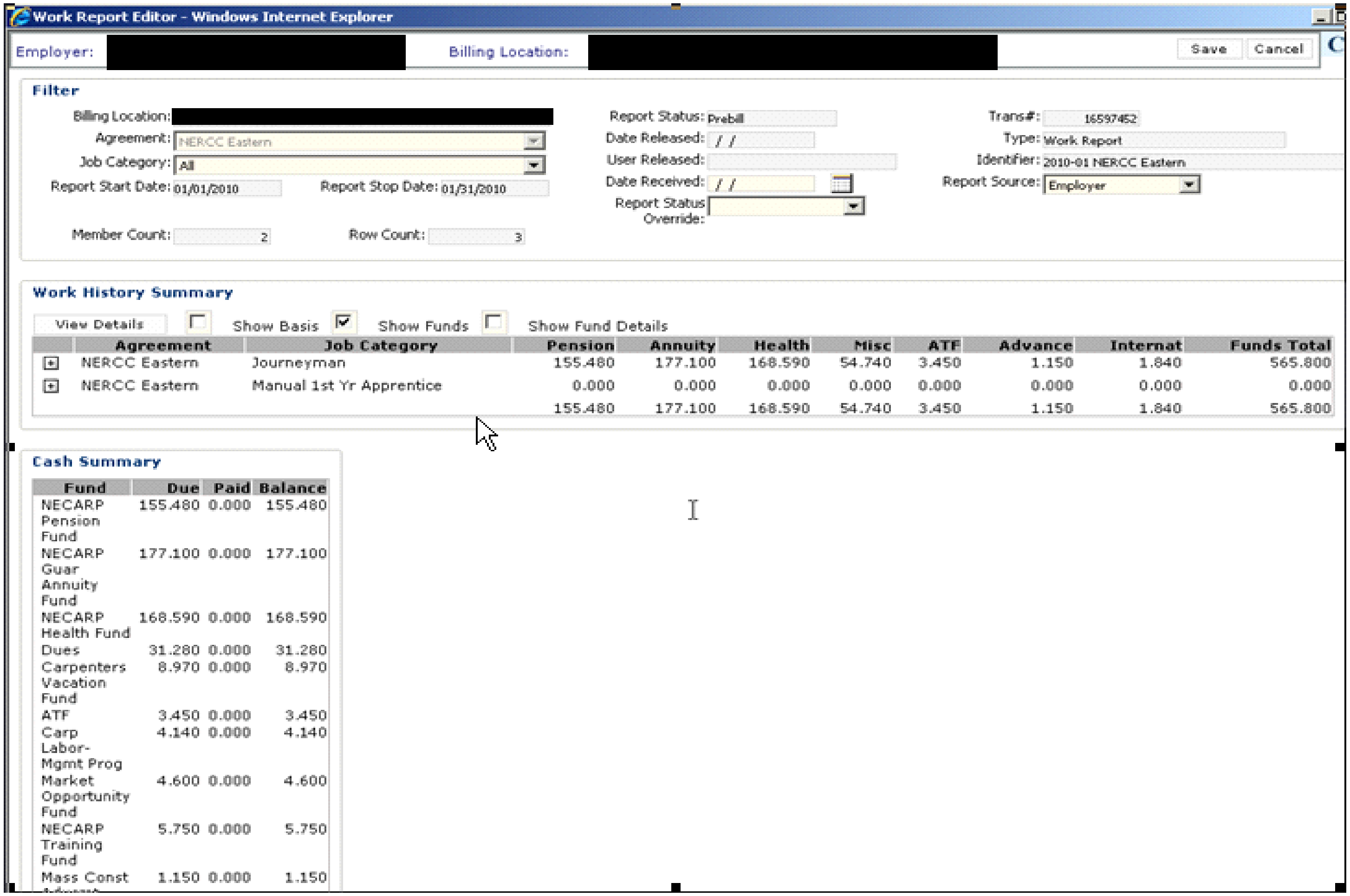
The Work History Summary provides you with two types of summaries:
- Totals by Agreement Name and Job Category
- Totals by Fund Contributions

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

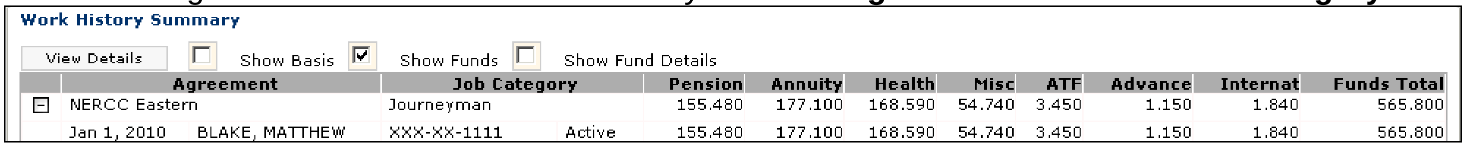
PAUSE

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.



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



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.

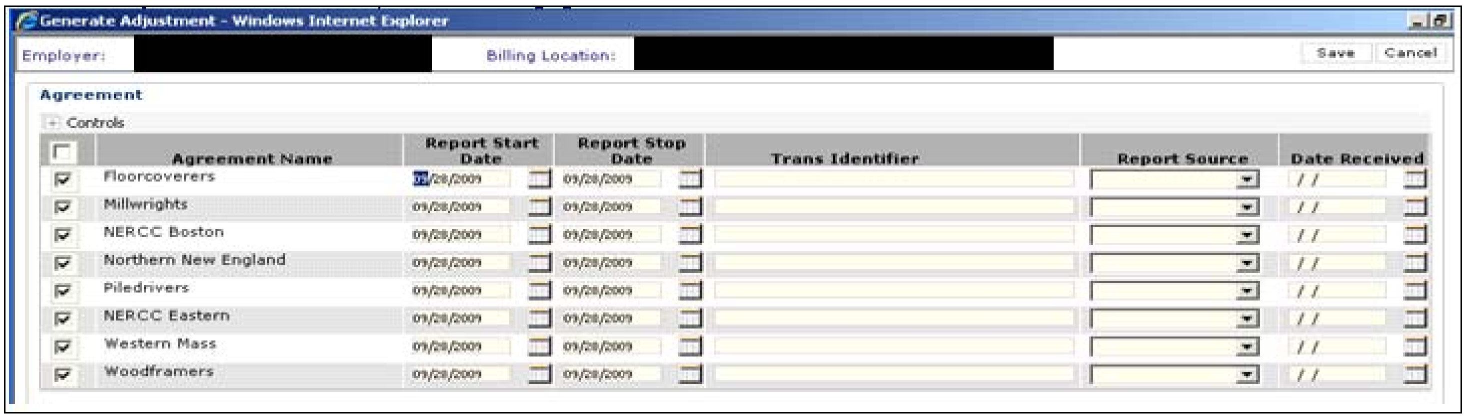
After a work report is released, the only way to make a correction is to create a work adjustment report.

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.



PAUSE

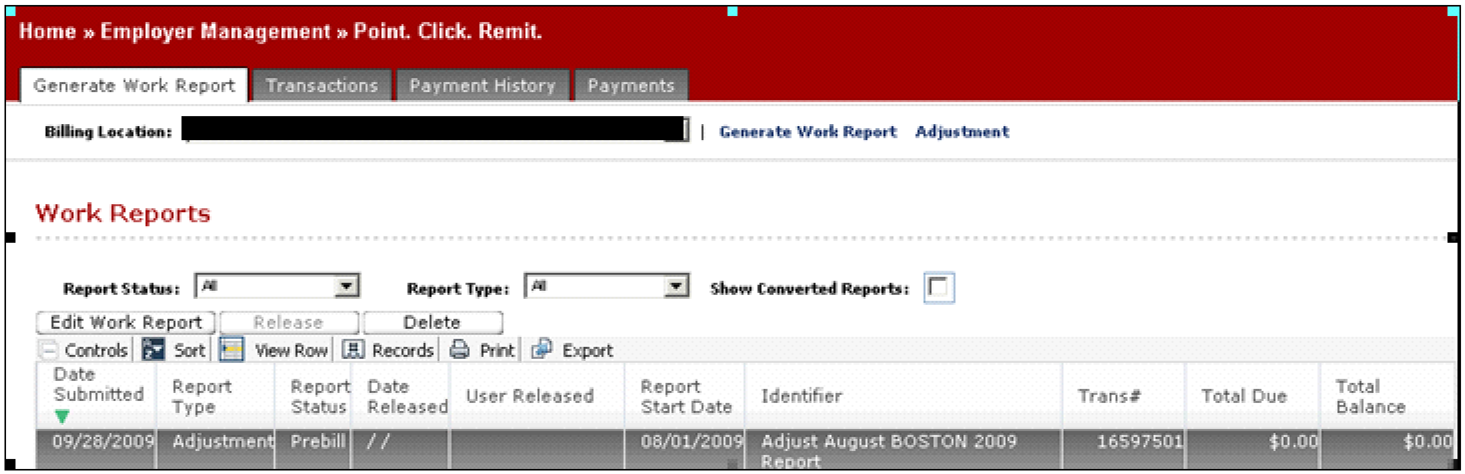
Click Save

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.



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

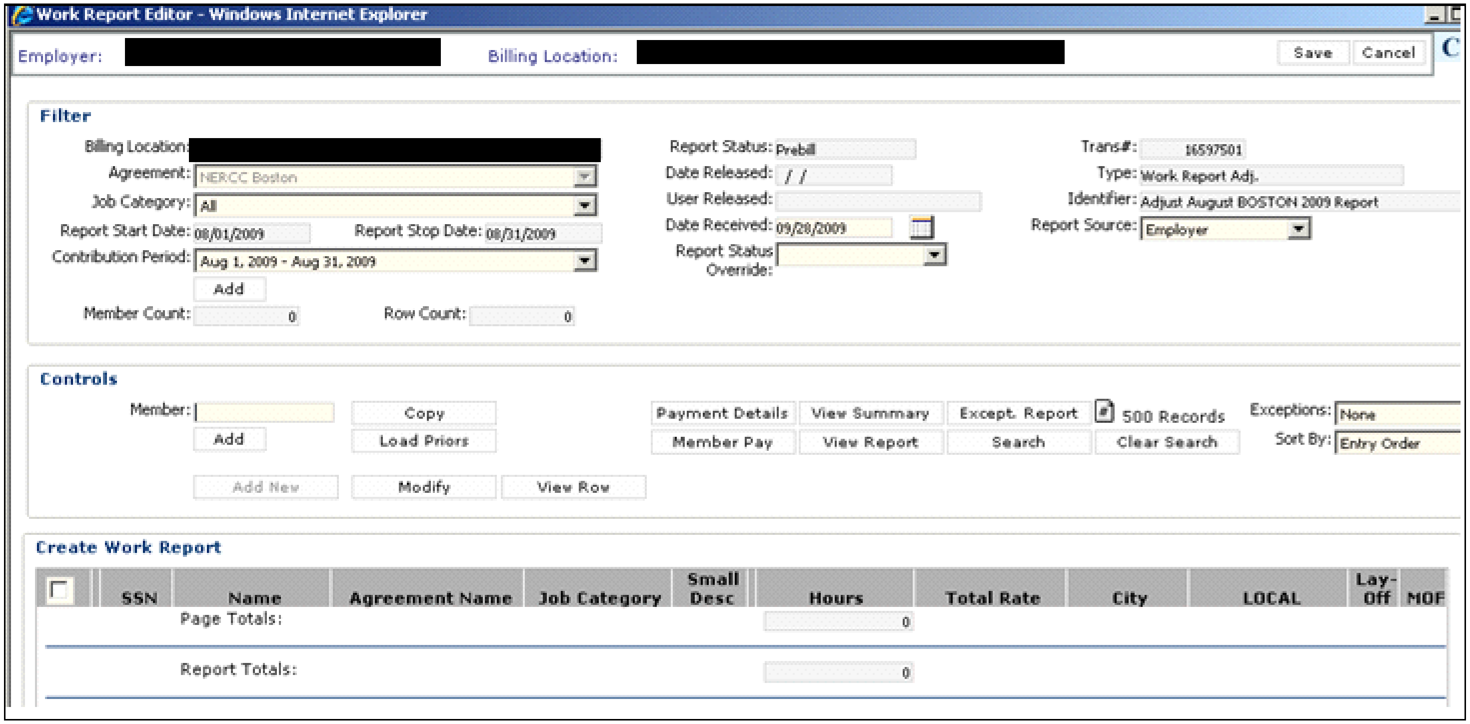
PAUSE

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



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.

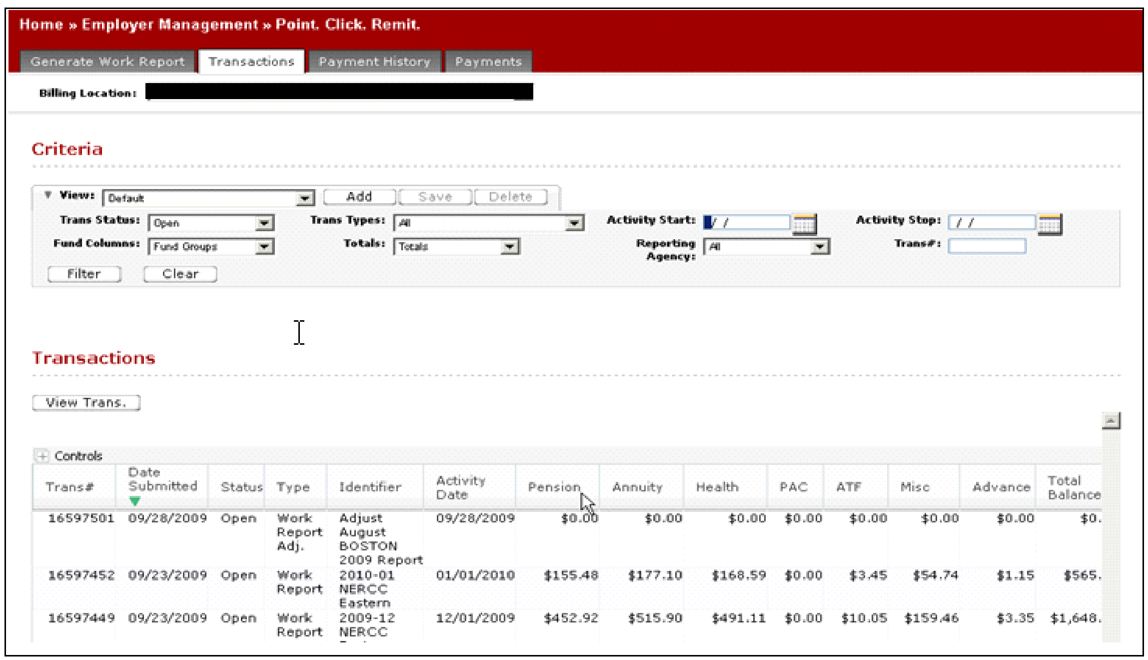
PAUSE

4B. Point. Click. Remit.

7. Review account transactions (transactions tab)
    a. View transaction detail
    b. Filter transactions

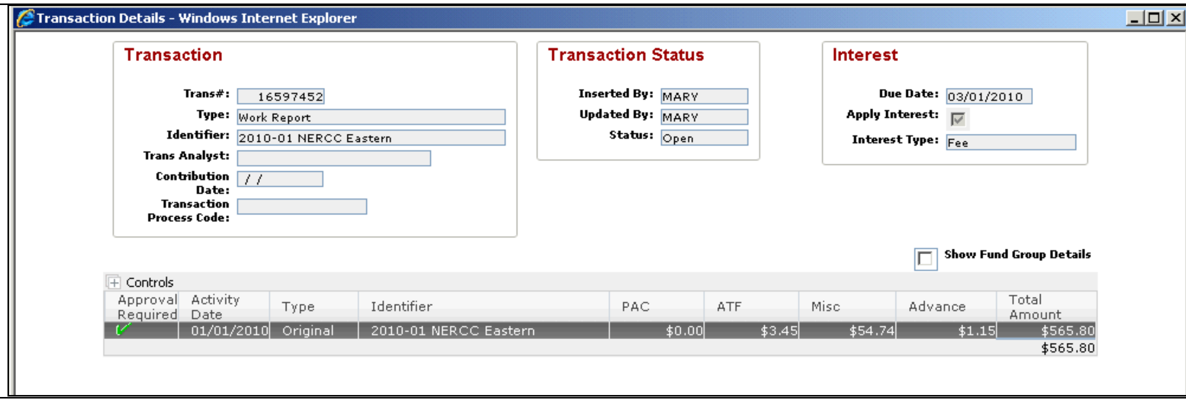
Click on the Transactions tab

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



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

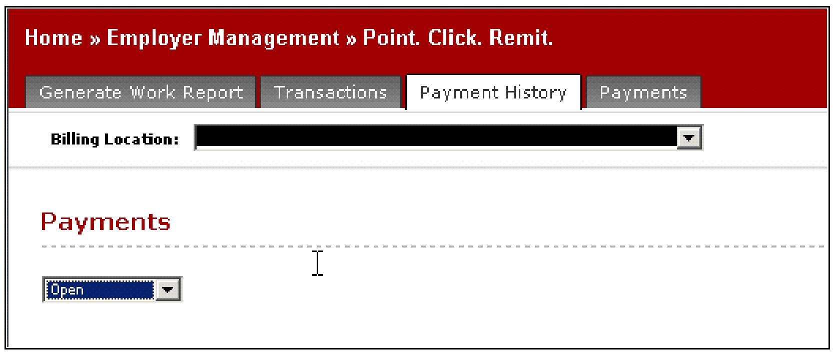
	criteria you entered. **PAUSE** **Click Filter** Click *Clear* to remove your entries and return to the default criteria. **PAUSE** **Click Clear** The Transactions section displays all transactions that meet the filter criteria entered. You may also view a transaction in more detail by highlighting 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.



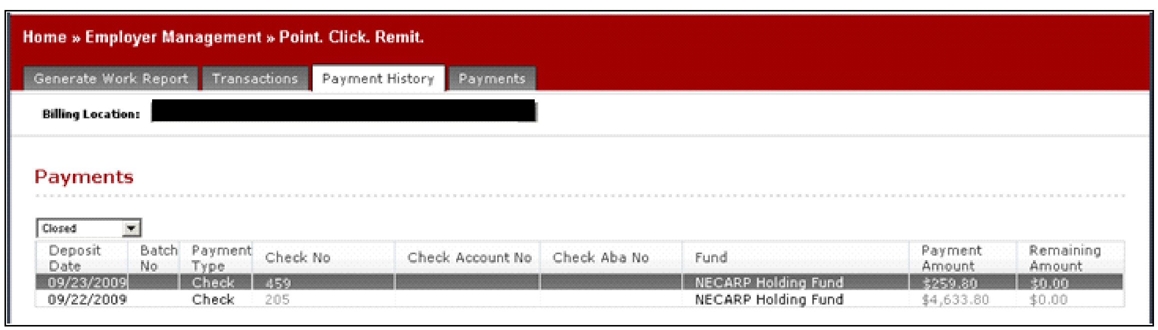
4B. Point. Click. Remit.
8. View payment history (payment history tab)

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.



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



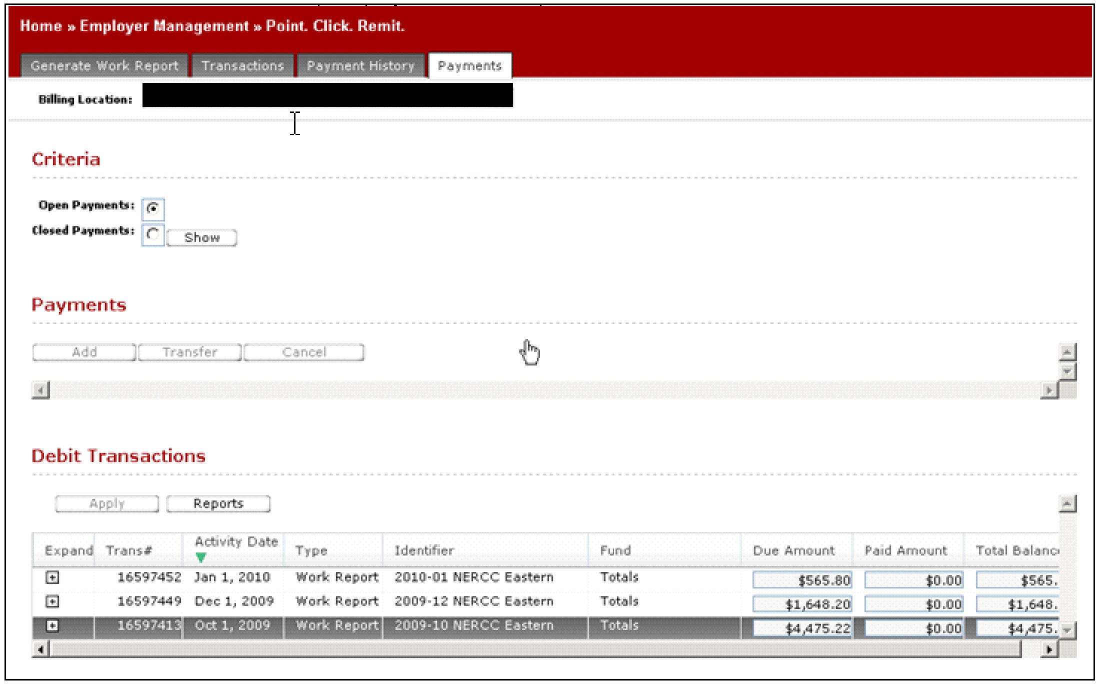
PAUSE

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.



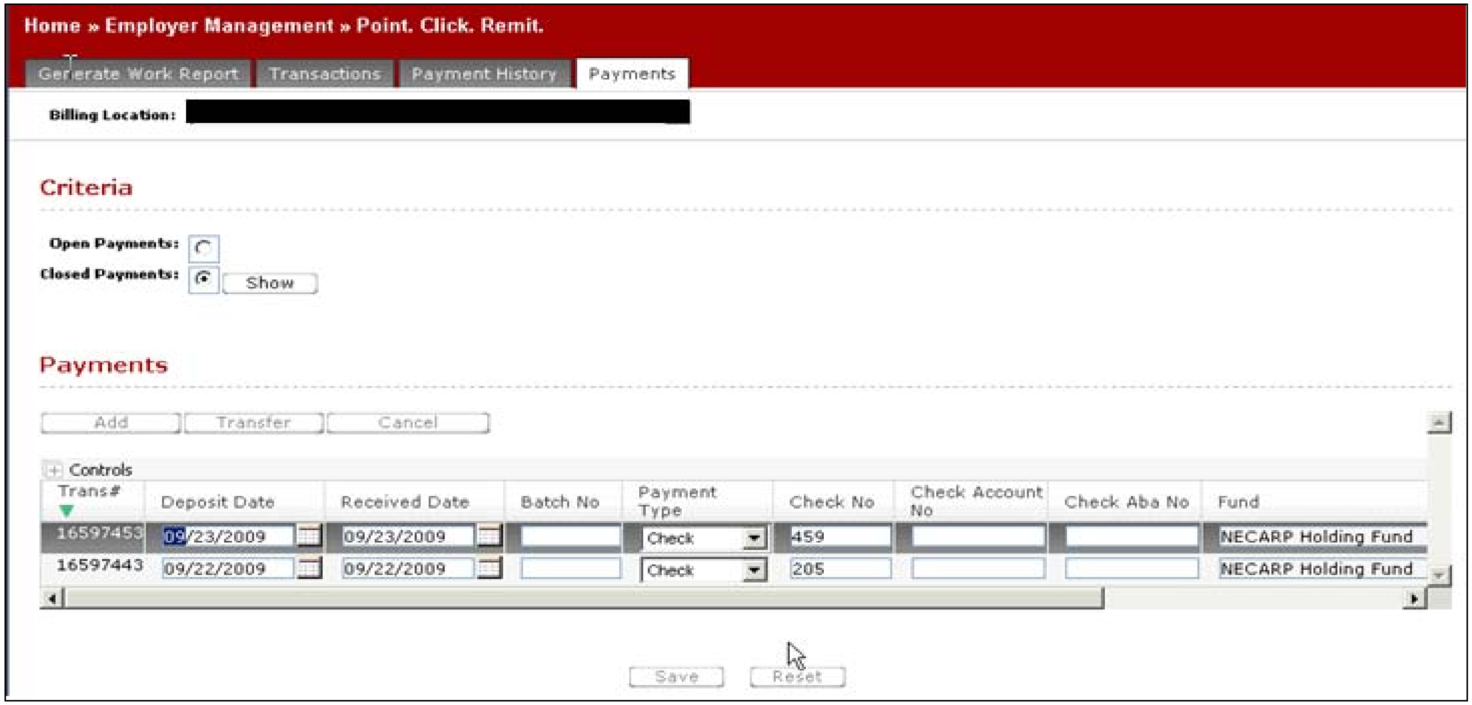
Please note that a balance forward of your previously made purchases will show as a credit item in the payments tab.

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

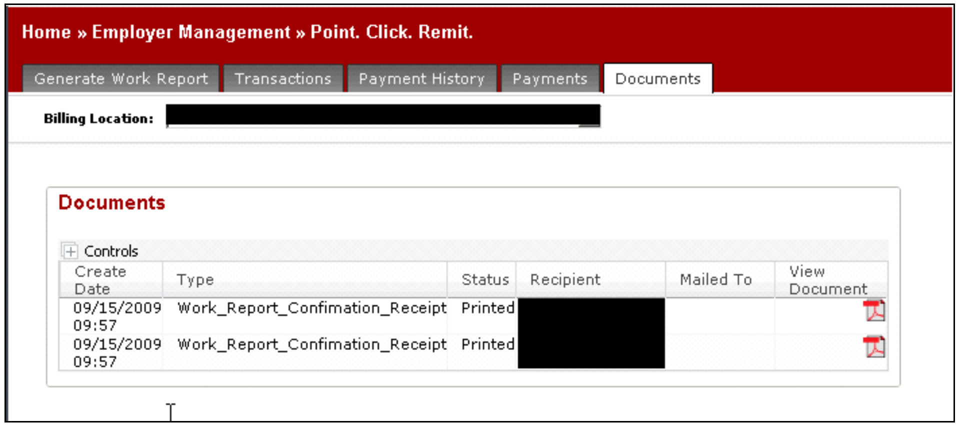


4B. Point. Click. Remit.

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.

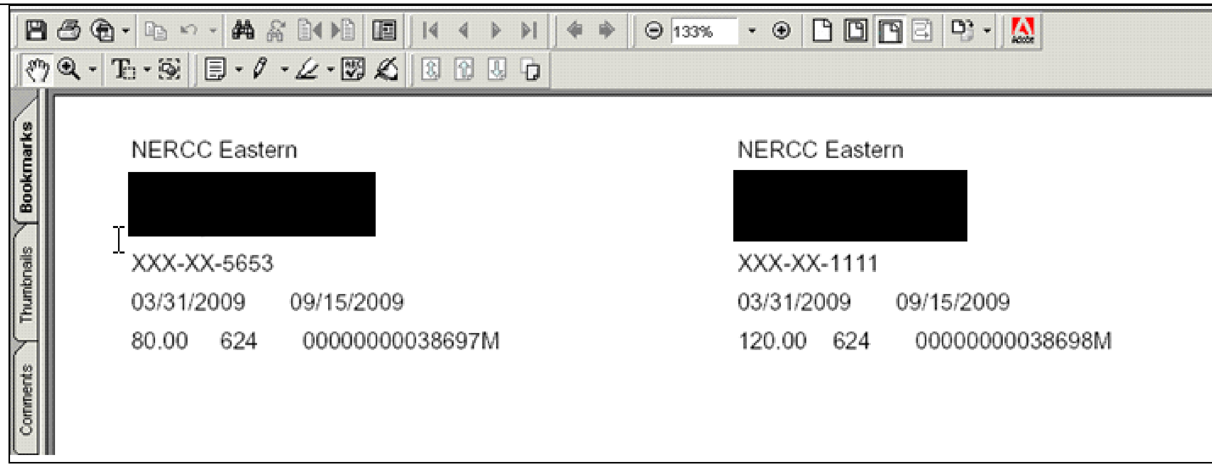


Click on the *PDF icon* to view and print the confirmation receipts.

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.