# Employer Self-Service (ESS) Guide

How to use the New England Carpenters Benefit Funds Employer Self-Service website.

# Contents

# Introduction
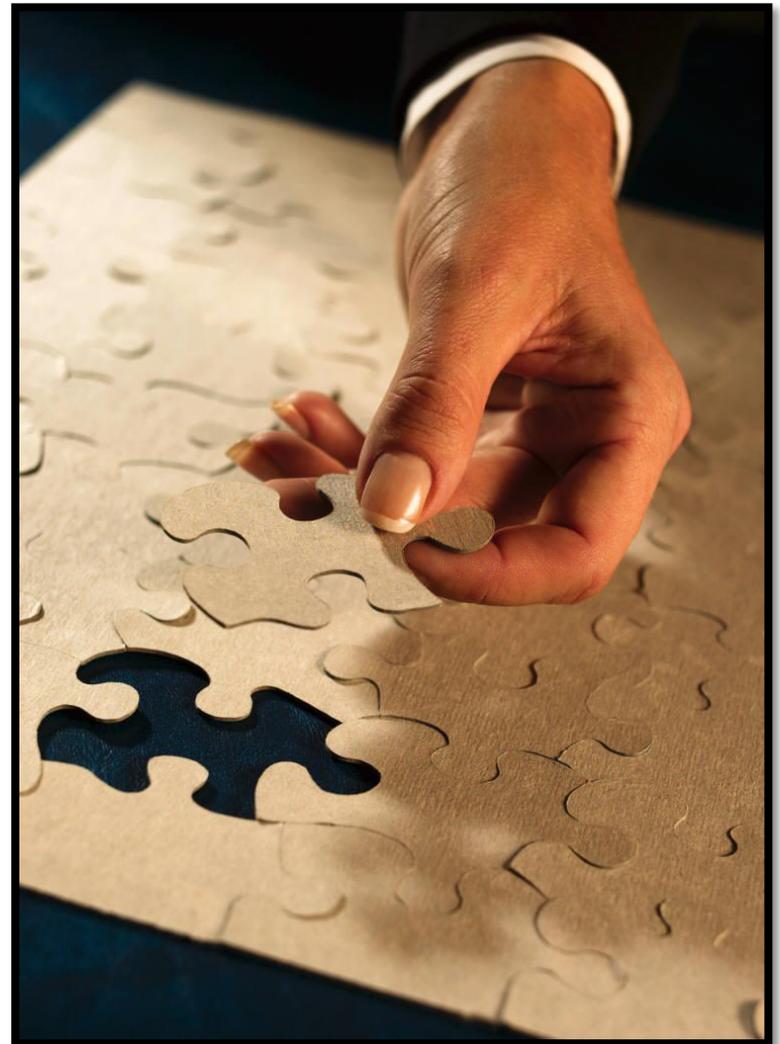
▸ In August 2015, the Employer Self-Service (ESS) portal has been upgraded to simplify the process of submitting Carpenter's fringe benefit hours.

▸ Employers already familiar with ESS will find the latest updates to be helpful improvements!

▸ Employers new to ESS can use this presentation to learn how to upload and download Work Reports.
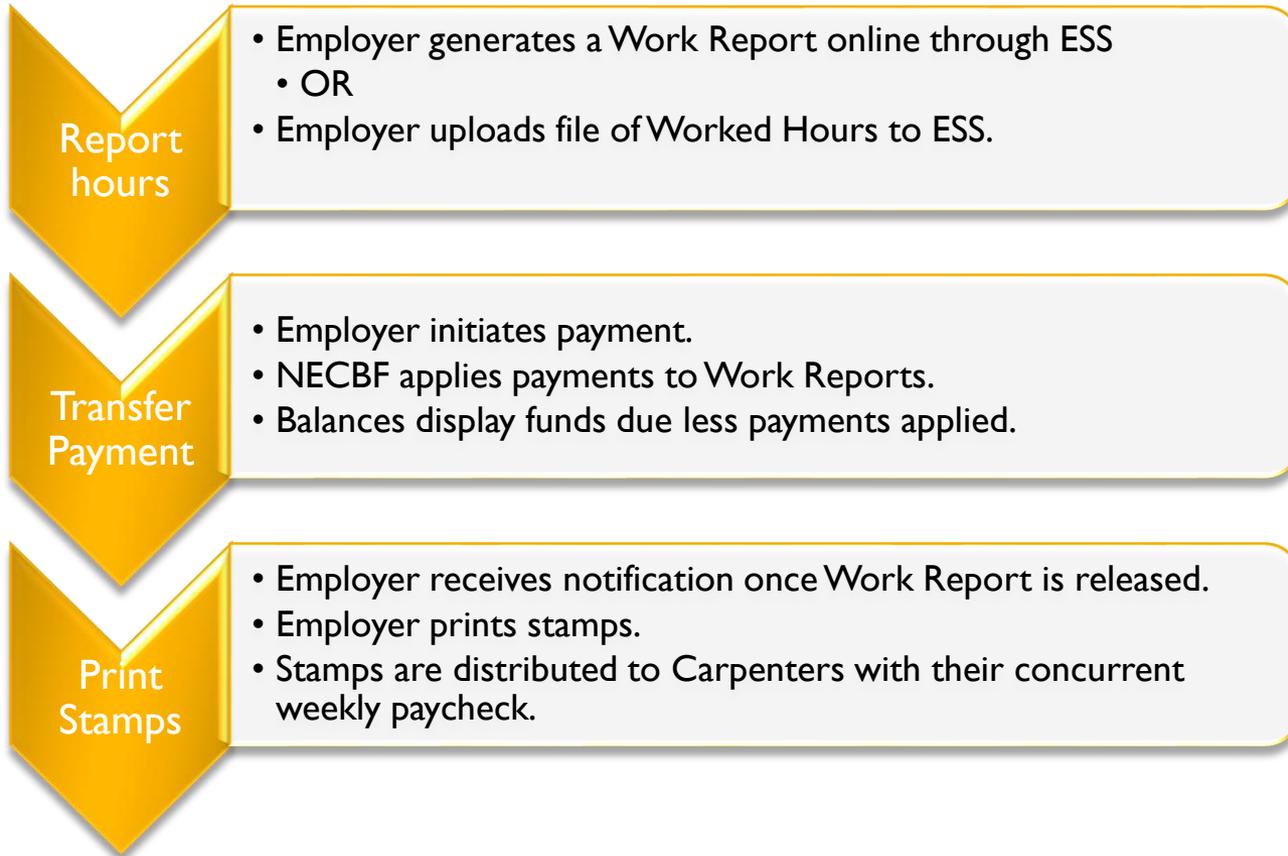
# Improvements

‣ Improved ways to locate and view items!
  ‣ Account Transactions Page:
    ☐ It's easier to find Open and Closed Transactions with enhanced filtering based on Status.
  ‣ Stamps Page:
    ☐ Added search capabilities by received or paid date and Print Status to quickly identify which Stamps to print.
‣ Overall enhanced user experience!
  ‣ Renamed links and labels to facilitate a more intuitive experience.
‣ Simplified Work Report imports!
  ‣ Flexibility with identifying members: Use SSN or UBC ID.
  ‣ No required or restricted data for member's middle initial and suffix.
  ‣ Acceptable date formats now include mm/dd/yyyy or m/d/yyyy as no leading '0' required.

# Overview

▸ Employers use the New England Carpenters Benefit Funds Employer Self-Service (ESS) website to report hours and print stamps after payment is made.

▸ Each topic covered in this training will explain how to use the ESS system.

# Workflow

**Report hours**
- Employer generates a Work Report online through ESS
  - OR
- Employer uploads file of Worked Hours to ESS.

**Transfer Payment**
- Employer initiates payment.
- NECBF applies payments to Work Reports.
- Balances display funds due less payments applied.

**Print Stamps**
- Employer receives notification once Work Report is released.
- Employer prints stamps.
- Stamps are distributed to Carpenters with their concurrent weekly paycheck.

# Vocabulary

▸ ESS – Employer Self-Service website is used to manage reporting of Carpenters Union member's hours worked.

▸ NECBF – New England Carpenters Benefit Funds

▸ NECCA – New England Carpenter's Central Collection Agency.

▸ Work Report – A report of the hours worked by a member of the Carpenter's Union.

▸ Download – Transferring a file *from* another system.

▸ Upload – Transferring a file *to* another system.

# Login to Employer Self-Service (ESS)

➢ Go to ESS Website:

https://v3.carpentersfund.org/v3prod/app?service=page/EmployerPages:EmployerLogin

▸ Enter the login and password given by NECBF/CCA.
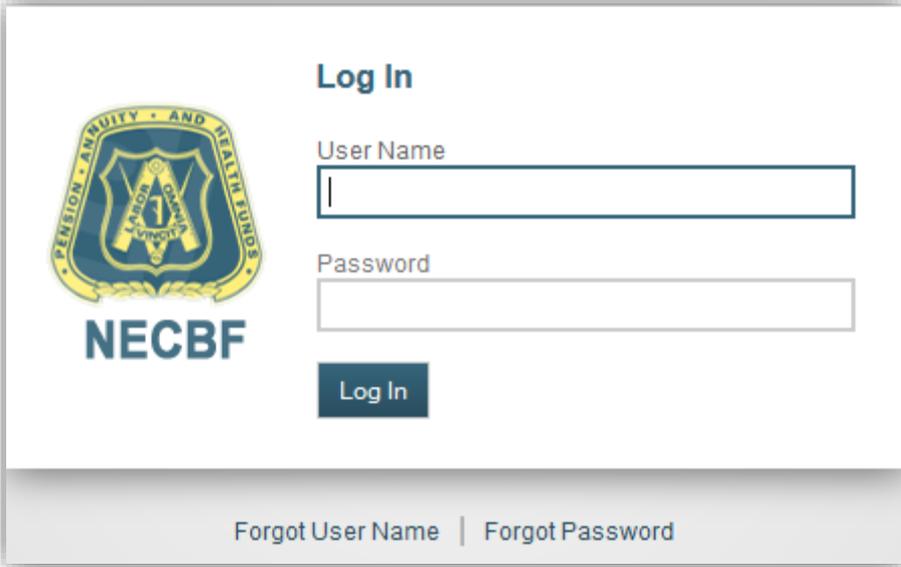


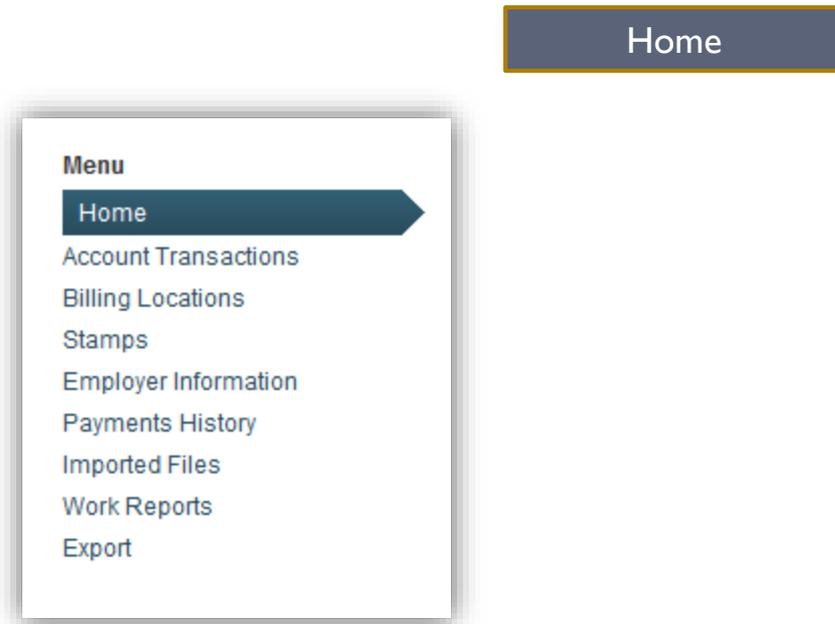- Click on Forgot User Name to recover your User Name.
- Click on Forgot Password to recover your password.
- After 3 incorrect login attempts, the system will require you contact NECBF/CCA for an account reset. *Note: NECBF does not know your password.*

# Navigation Menu

▸ The Navigation Menu is located on the left side of the ESS website pages.

▸ In this guide, this format indicates a menu item:



Home

**Menu**
Home
Account Transactions
Billing Locations
Stamps
Employer Information
Payments History
Imported Files
Work Reports
Export

*NOTE: Do not use the Web Browser back arrow to navigate.*

# ESS Home Page

▸ The ESS Home page displays the current Benefit Funds Account Balance of each Billing Location.

▸ An account balance of $0. indicates all Work Reports have been paid in full with no remaining balance.

▸ A positive account balance is an indication of an unpaid Work Report by the Employer.

▸ A negative account balance indicates that money paid to NECBF has not yet been applied to Work Reports.

# ESS Home Page



In the above example, the E-Weekly Billing Location has a negative balance of $43.69. This indicates money received by NECBF and not yet applied to a Work Report.

Click on Account Transactions or Transactions link or to see balance details.

Click on the Billing Locations or Profile link to see location details.

# Account Transactions Page



The **Account Transactions** Page displays balances based on the filter criteria.

Click on down arrow in Actions column to View Allocations Details.

Note: Future dated Work Reports will not display on the **Account Transactions** Page.

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# Account Transactions Details Page

▸ The Account Transactions Details Page contains the Receivable and Allocation details for the item that was highlighted on the Account Transactions Page.

▸ The Receivable Details section displays when inquiring on a Work Report. It is itemized by benefit fund.

▸ The Allocation Details will itemize transactions by Work Report and/or Payment being inquired about.

 8/17/2015 Update v9.10

# NEW ENGLAND CARPENTERS BENEFIT FUNDS

A0052 - ABC ASSOCIATES, INC. [Change Account]

Welcome Robyn Test    07/27/2015

**Shortcuts**

- Create New Work Report
- Import a File

**Menu**

Home
Account Transactions
Billing Locations
Stamps
Employer Information
Payments History
Imported Files
Work Reports
Export

## Account Transaction Details

Account: A0052E ABC ASSOCIATES, INC. - E WEEKLY

[Back]

### Transaction Details

| | | | |
|---|---|---|---|
| Transaction Type: | Work Report | Status: | Open |
| Trans#: | 81000394 | Created By: | cbertrand |
| Description: | 2015-05-10 - 2015-05-16 Floorcoverers | Created Date: | Jul 23, 2015 |

### Receivable Details

| | | | |
|---|---|---|---|
| Report Type: | Regular | Transaction Date: | May 10, 2015 |
| Invoice Status: | Prebill | Due Date: | May 31, 2015 |
| Released By: | | Released Date: | |

Records  Export

| Fund | Original Amount | Amount Paid | Balance |
|---|---|---|---|
| NECARP Guar Annuity Fund | $17.60 | ($17.60) | $0.00 |
| NECARP Health Fund | $98.00 | ($98.00) | $0.00 |
| Dues | $8.60 | ($8.60) | $0.00 |
| NECARP Vacation Fund | $13.30 | ($13.30) | $0.00 |
| ATF | $2.00 | ($2.00) | $0.00 |
| Carp Labor-Mgmt Prog | $1.70 | ($1.70) | $0.00 |
| Market Opportunity Fund | $3.00 | ($3.00) | $0.00 |
| NECARP Training Fund | $3.00 | ($3.00) | $0.00 |
| Floorcov Inds Imprv Fund | $2.00 | ($2.00) | $0.00 |
| Carp Intl Training Fund | $0.60 | ($0.60) | $0.00 |
| Carp Intl Training Fund II | $0.20 | ($0.20) | $0.00 |
| Intl Labor Mgmt Comm Flooring | $0.20 | ($0.20) | $0.00 |
| Foundation For Fair Contracting | $0.20 | ($0.20) | $0.00 |
| Annuity II Training Fund | $0.30 | ($0.30) | $0.00 |
| UBC Dues | $0.50 | ($0.50) | $0.00 |

Showing Records 1 - 15 of 15

### Allocation Details

Records  Export

| Activity Date | Inserted Date | Detail Type | Trans # | Invoice & Trans. Description | $$$ | Balance |
|---|---|---|---|---|---|---|
| 05/10/2015 | 07/23/2015 | Original | | 2015-05-10 - 2015-05-16 Floorcoverers | $151.20 | $151.20 |
| 07/24/2015 | 07/24/2015 | Credit In | 81000396 | Payment 07/23/2015 - 81000396 | ($151.20) | $0.00 |
| | | | | | $0.00 | |

Showing Records 1 - 2 of 2

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# Billing Locations Page

▸ The  Billing Locations  Page can be accessed by clicking on the navigation menu link: Billing Locations

▸ When there is more than one billing cycle, it can be selected from the top drop-down menu.

▸ A Work Report confirmation email will be sent to the contact listed on this page.

▸ Use the edit and delete buttons/links to change Billing Location address and contacts.

A0052 - ABC ASSOCIATES, INC. [Change Account]                                    **Welcome Robyn Test**    07/27/2015

**Shortcuts**
📄 Create New Work Report
⬆ Import a File

**Menu**
Home
Account Transactions
Billing Locations
Stamps
Employer Information
Payments History
Imported Files
Work Reports
Export

**Billing Locations**

Below is a list of accounts that you are authorized to manage. To edit the address or contacts of a specific account, select the account from the Billing Location drop down menu and then click the corresponding "Edit Billing Address" or "Add Contact" buttons below. Billing Location Information is read-only. If that needs to be updated, please contact the fund office.

Billing Location: | A0052E ABC ASSOCIATES, INC. - E WEEKLY |
A0052E ABC ASSOCIATES, INC. - E WEEKLY

**Billing Location Information**

Account ID: 306486
Code:        A0052E                Start Date:   Jan 1, 2010
Name:        ABC ASSOCIATES, INC. - E WEEKLY    Stop Date:
                                   Updated Date: Jul 3, 2015

**Billing Location Address**

**Phone:**
    Phone:       (781) 726-0552       UNITED STATES
**Email:**
    Primary:     v3test@carpentersfund.org  ◀———  Please note that the
                                                  primary email can only
    Edit Billing Location Address                 be changed by CCA.

**Contacts**

The following people and organizations are designated as official account contacts.

🔲 Records 📄 Export

| Name | Phone | Email | Action |
|------|-------|-------|--------|
| Test, Robyn | | test@test.com | Edit \| Delete |

Showing Records 1 – 1 of 1

Add Contact

# Stamps

▸ To print stamps for released Work Reports, click on Stamps in the left navigation menu.

▸ Select the desired Billing Location, Status (Printed and Queued) and Date range. Then click Search to view a listing of Stamp .pdf files.

▸ Clicking on a Stamp file will open it for printing. (Adobe Acrobat required to view file.)

# Employer Information

▸ The Employer Information Page can be accessed by clicking on the navigation menu link: **Employer Information**

▸ Use the edit and delete links to change Contact.

▸ Call or Email CCA to change any other Employer Information.

# Payment History

▸ The Payment History Page can be accessed by clicking on the navigation menu link: **Payment History**

▸ Select Open, Closed or All to filter payments displayed.

# Work Reports

- The **Work Reports** Page can be accessed by clicking on the navigation menu link: Work Reports
- This page displays the Draft Work Reports which have not yet been submitted to NECBF.
- These Draft Work Reports can be viewed and edited by clicking on the Details link.
- To filter the listing of Draft Work Reports, select Date Range and Report Type.
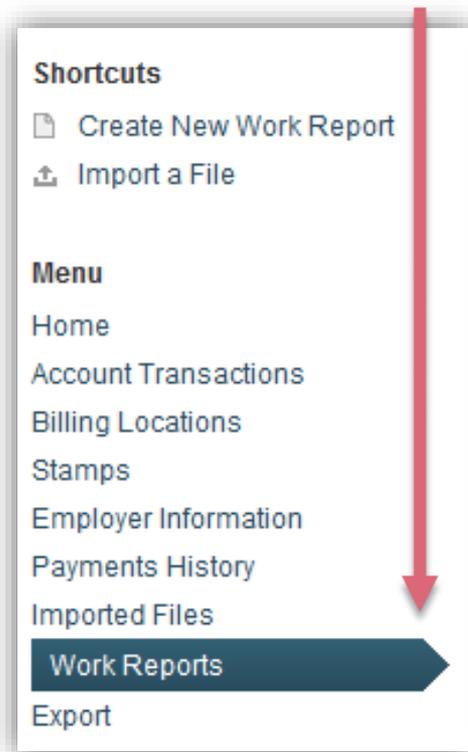
# Submitting Work Reports to NECBF

▸ The Types of Work Reports are: Regular and Adjustment.

▸ All Worked Hours must be reported to NECBF.

▸ Using the ESS website, the Worked Hours can be submitted to NECBF by either of these options:

  ▸ Method 1: Create a Work Report online.

  ▸ Method 2: Upload a file of Worked Hours.

  ▸ With either option, even after a Work Report is submitted, hours or members can be ADDED to the existing report by submitted another report with only the additions for the same work period dates.

▸ To REDUCE hours or REMOVE members from a submitted Work Report, please call the CCA Staff.
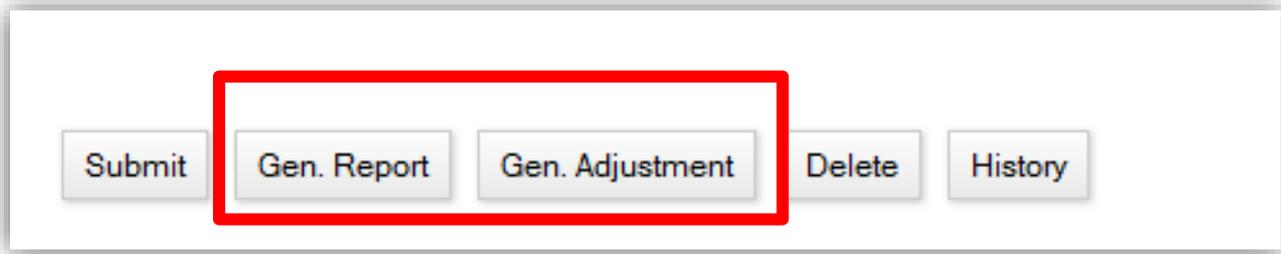
# Work Report Method 1: Online Process – Step 1

▸ An alternative method to uploading a file is to fill-out the Work Report online through the ESS website.

▸ The process to upload a Work Report file is as follows:

  ▸ Step 1: Click on [ Work Reports ] menu in left navigation.

.

**Shortcuts**

📄 Create New Work Report

⬆ Import a File

**Menu**

Home

Account Transactions

Billing Locations

Stamps

Employer Information

Payments History

Imported Files

Work Reports ▶

Export

This will navigate you to the Work Reports Page.

# Work Report: Online Process – Step 2

▸ Step 2: Click on Generate Report or Generate Adjustment button.

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This will navigate you to the Create New Work Report Page.

# Work Report: Online Process – Step 3

▸ Step 3: Click on Create Work Report Online button.

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**Create New Work Report**

Please select how you would like create a new work report. You have exported data from another system and you wish to upload it, click 'Create Work Report From File'. If you want to create a new work report manually, click 'Create Work Report Online'.

|  | Create Work Report From File | or | Create Work Report Online |

This will navigate you to the Create Work Report Online Page.

# Work Report: Online Process – Step 4

▸ Step 4: On the Create Work Report Online Page, select the agreement(s) and Start Date that apply.

▸ The Start Date that displays by default is based on the last Work Report filed. Please change the start date if needed, to reflect the week for the hours being reported.

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# Work Report: Online Process – Step 5

- Once the Work Report has been created, a success message will display at the top of the Work Reports page.
- Step 5: Click on Details link to open the Work Report and add Worked Hours.

A0052 - ABC ASSOCIATES, INC. [Change Account]                              Welcome Robyn Cogert    07/29/2015

Work report generated successfully.

**Shortcuts**
- Create New Work Report
- Import a File

**Draft Work Reports**

Below is a list of Work Reports that are in 'draft' status. That means that the Work Reports have not yet been submitted to the fund office and they are available for editing. When you wish to send the Work Report to the fund office click the 'Submit' link in the Actions column.

**Menu**

Home

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Payments History

Imported Files

**Work Reports**

Export

Billing Location: A0052E  ABC ASSOCIATES, INC. - E WEEKLY

A0052E ABC ASSOCIATES, INC. - E WEEKLY

**Work Reports**

Date Range: Last 12 Months    Type: All

| | Date | Period | Type | Description | Due | Actions |
|---|---|---|---|---|---|---|
| ☐ | 07/29/2015 | 01/11/2015 | Regular | 2015-01-11 - 2015-01-17 NERCC Boston | $0.00 | Details |
| | | | | | $0.00 | |

Showing Records 1 - 1 of 1

Submit   Gen. Report   Gen. Adjustment   Delete   History

# Work Report: Online Process – Step 6

▸ In the Work Report Editor, you have the following options to enter hours. After completed, click the Save button.

- Add a member by entering their UBC ID or SSN.
  - ☐ Step 1) Select the Job Category
  - ☐ Step 2) Click the Add button
  - ☐ Step 3) Enter UBC ID or SSN
- Add the hours worked.
- Change the hours worked.

# Work Report: Online Process – Step 7

▸ Once the Work Report has been saved, it will display on the Draft Work Reports Page.

▸ Step 7: Submit the report by selecting it and clicking Submit.

# Work Report Method 2: Upload Process – Step 1

▸ **The process to upload a Work Report file is as follows:**

  ▸ Step 1: Click on $\boxed{\text{Work Reports}}$ menu in left navigation.

**Shortcuts**

📄 Create New Work Report

⬆ Import a File

**Menu**

Home

Account Transactions

Billing Locations

Stamps

Employer Information

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Imported Files

Work Reports

Export
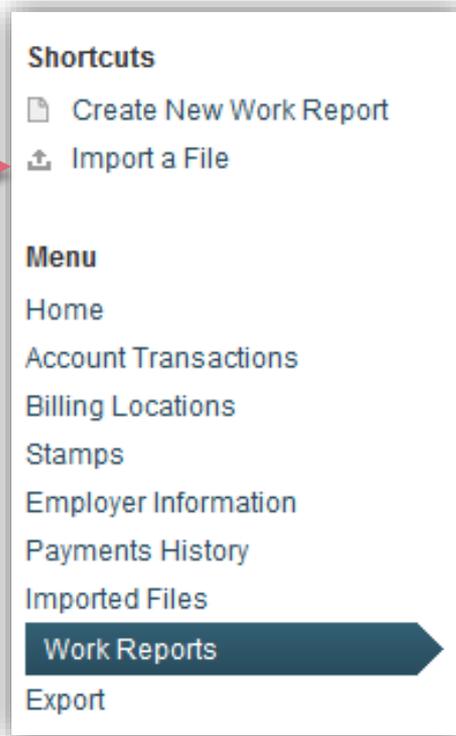
This will navigate you to the Work Reports Page.

> **Short-cut: Click on '*Import a File*' link and skip step 2.**

# Work Report File: Example

An import template is available from NECCA on request.

Middle Initial and Suffix are not required fields.

| EMPLOYER CODE | LAST NAME | FIRST NAME | MIDDLE INITIAL | SUFFIX | UBC ID | AGREEMENT | JOB CATEGORY | START DATE | STOP DATE | HOURS | LOCAL | LAY-OFF | MOF |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A0000 | TEST | TEST | T | | U11111111 | BOS | JM | 6/21/2015 | 6/27/2015 | 48 | 33 | N | N |
| A0000 | TEST | TEST | J | | U11111112 | BOS | 4A | 6/21/2015 | 6/27/2015 | 34 | 33 | N | N |

Dates must be:
- Within Reporting Cycle Range
- Formatted with forward slash mm/dd/yyyy or m/d/yyyy
- Do not require leading 0.

# Work Report: Upload Process – Step 2

▸ Step 2: Click on Generate Report or Generate Adjustment button.

·
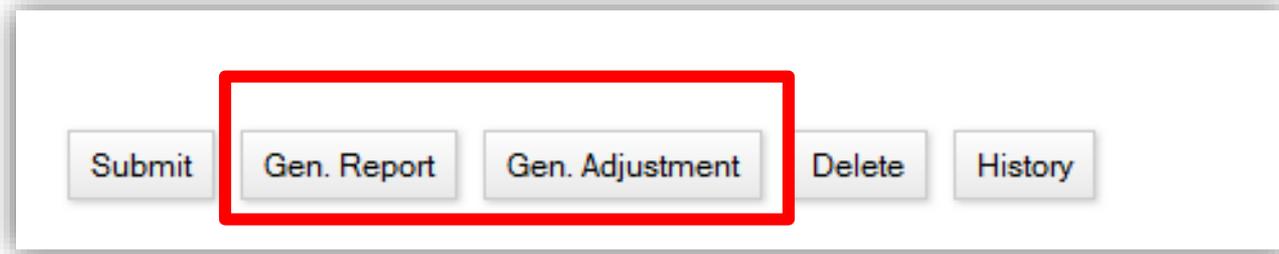


This will navigate you to the Create New Work Report Page.

# Work Report: Upload Process – Step 3

▸ Step 3: Click on Create Work Report From File button.

•

## Create New Work Report

Please select how you would like create a new work report. You have exported data from another system and you wish to upload it, click 'Create Work Report From File'. If you want to create a new work report manually, click 'Create Work Report Online'.

| Create Work Report From File | or | Create Work Report Online |
|---|---|---|

This will navigate you to the Imported File Page.

# Work Report: Upload Process – Step 4

▸ Step 4: Click on Browse button to select file from your computer.

**Imported File**

To upload a file first select the Account that you wish to upload a file for. Select the file from your desktop by clicking the 'Browse' button. Then select the file type and fill in the file details. When the file is ready to be uploaded, please click the 'Upload' button. Depending on the size of your file the upload process could take many minutes. Please do not navigate away from the current page while an upload is in progress or the upload will fail.

Account: ABC ASSOCIATES, INC. - E WEEKLY

File Type: Work Report Import ESS

File: Browse... No file selected.

Description:

Upload

Enter a Description and Click the Upload button when finished.

# Work Report: Upload Process Completed

▸ Once a file is uploaded, the Work Report will be created automatically.

▸ You can immediately view it online by clicking on Imported Files

# Work Report: Upload Unsuccessful

▸ If the file upload was unsuccessful it will state this on the Imported Files Page, under the Status Column.

▸ To see a description of the errors, click on the Details link under the Action Column. This will open the Import Details Page.

# Imported Files

- ▸ The Imported Files Page can be accessed by clicking on the navigation menu link: **Imported Files**

- ▸ Select Status and Date Range to filter the listing of imported files.

- ▸ The Status indicates if the upload was successfully processed or not.

- ▸ To view the details of each Work Report, click on Details link.

- ▸ To Upload a new file which automatically creates a new Work Report

  click on: Upload New File button.



Note: Once 'Work Report Status' changes to Processed, it is no longer available for editing. A new Work Report for the same period can be uploaded to change it.

# Imported Files Details Page

▸ The Imported Files Details Page displays the details from the Work Report on the preceding Imported Files Page.

▸ Select the Process Flag, Search Field and Search Text, then click on Filter button to sort the individuals on the Work Report.

▸ All Errors can be viewed by clicking on the View Errors button or select which ones to view by clicking in box to select.

A0052 - ABC ASSOCIATES INC. [Change Account]                                   Welcome Robyn Test   07/27/2015

**Shortcuts**
📄 Create New Work Report
⬆ Import a File

**Menu**
Home
Account Transactions
Billing Locations
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Employer Information
Payments History
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Work Reports
Export

**Imported File**

Below are the details of the file that has been uploaded for processing.

| | | | |
|---|---|---|---|
| Load Date: | Jul 17, 2015 | Process Status: | Processed with Errors |
| Type: | Work Report Import ESS | Process Start: | Jul 17, 2015 |
| Status: | Processed with Errors | Process Stop Date: | Jul 17, 2015 |
| Description: | test | Progress Rpt: | |

**Import Details**

Process Flag: [All ▼]
Search Field: [ ▼]     Search Text: [          ]  [Filter]  [Clear]

[View Errors]

🔲 Filter  ▦ Records  📄 Export

| | Seq No | Import Detail Status | Resubmit Flag | EMPLOYER CODE | LAST NAME | FIRST NAME | MIDDLE INITIAL | SUFFIX | UBC ID OR SSN | AGREEMENT | JOB CATEGORY | START DATE | STOP DATE | HOURS | LOCAL | LAY-OFF | MOF |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | | | | EMPLOYER CODE | LAST NAME | FIRST NAME | MIDDLE INITIAL | SUFFIX | UBC ID | AGREEMENT | JOB CATEGORY | START DATE | STOP DATE | HOURS | LOCAL | LAY-OFF | MOF |
| ☐ | 1 | Processed Successfully | ☑ | | | | | | | | | | | | | | |
| ☐ | 2 | Processed With Errors | ☑ | A0052 | THREE | MEMBER | | | U00000003 | BOS | JM | 04/06/2014 | 041/22/014 | 100 | 33 | N | N |
| ☐ | 3 | Validated Successful | ☑ | A0052 | THREE | MEMBER | | | U00000003 | BOS | JM | 04/13/2014 | 04/19/2014 | 50 | 33 | N | N |
| ☐ | 4 | Validated Successful | ☑ | A0052 | THREE | MEMBER | | | U00000003 | BOS | JM | 04/20/2014 | 04/26/2014 | 50 | 33 | N | N |
| ☐ | 5 | Validated Successful | ☑ | A0052 | THREE | MEMBER | | | U00000003 | BOS | JM | 04/27/2014 | 05/03/2014 | 100 | 33 | N | N |
| ☐ | 6 | Processed With Errors | ☑ | A0052 | FOUR | MEMBER | | | U00000004 | BOS | 4A | 04/06/2014 | 041/22/014 | 100 | 33 | N | N |
| ☐ | 7 | Processed With Errors | ☑ | A0052 | FOUR | MEMBER | | | U00000004 | BOS | 4A | 04/13/2014 | 04/19/2014 | 100 | 33 | N | N |
| ☐ | 8 | Processed With Errors | ☑ | A0052 | FOUR | MEMBER | | | U00000004 | BOS | 4A | 04/20/2014 | 04/26/2014 | 100 | 33 | N | N |
| ☐ | 9 | Processed With Errors | ☑ | A0052 | FOUR | MEMBER | | | U00000004 | BOS | 4A | 04/27/2014 | 05/03/2014 | 100 | 33 | N | N |
| ☐ | 10 | Processed With Errors | ☑ | A0052 | FOUR | MEMBER | | | U00000004 | BOS | 4A | 10/05/2014 | 10/11/2014 | 100 | 33 | N | N |

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# Import Details Page

- The Import Details Page displays the details from the Imported File. See screenshot in next slide.

- For each row on the file, it will display its content and if that specific row had errors.

- To view the errors, click on the View Errors button.

- This will pop-up a smaller window describing the specific errors.

# Import Details Page: View Errors



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# Work Report: Export

▸ Once a file is uploaded, it can also be exported.

▸ Click on ▐ Export ▌ in the left navigation menu.

▸ Then click on the file that you want to save or print.

# Agreement Codes

| Agreement Name | Agreement Code | Job Category | Stamp Code |
|----------------|----------------|--------------|------------|
| Boston Mass | BOS | JM | Y |
| Boston Mass | BOS | 1A | K |
| Boston Mass | BOS | 2A | K |
| Boston Mass | BOS | 3A | K |
| Boston Mass | BOS | 4A | K |
| Eastern Mass | EAST | JM | M |
| Eastern Mass | EAST | 1A | O |
| Eastern Mass | EAST | 2A | O |
| Eastern Mass | EAST | 3A | O |
| Eastern Mass | EAST | 4A | O |
| Floorcoverers | FLOOR | JM | X |
| Floorcoverers | FLOOR | 1A | J |
| Floorcoverers | FLOOR | 1M | J |
| Floorcoverers | FLOOR | 2A | J |
| Floorcoverers | FLOOR | 3A | J |
| Floorcoverers | FLOOR | 4A | J |

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# Agreement Codes

| | | | |
|---|---|---|---|
| Floorcoverers Cosmetic | FLOORCOS | JM | X |
| Floorcoverers Cosmetic | FLOORCOS | 1A | J |
| Floorcoverers Cosmetic | FLOORCOS | 2A | J |
| Floorcoverers Cosmetic | FLOORCOS | 3A | J |
| Floorcoverers Cosmetic | FLOORCOS | 4A | J |
| Floorcoverers Residential | FLOORRES | JM | Q |
| Millwrights | MILL | JM | W |
| Millwrights | MILL | 1A | W |
| Millwrights | MILL | 2A | W |
| Millwrights | MILL | 3A | W |
| Millwrights | MILL | 4A | W |

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# Agreement Codes

| Agreement Name | Agreement Code | Job Category | Stamp Code |
|---|---|---|---|
| Northern New England LU 118 (NH) | NNE118 | JM | N |
| Northern New England LU 118 (NH) | NNE118 | 1A | N |
| Northern New England LU 118 (NH) | NNE118 | 2A | N |
| Northern New England LU 1996 (VT/ME) | NNE1996 | JM | N |
| Northern New England LU 1996 (VT/ME) | NNE1996 | 1A | N |
| Northern New England LU 1996 (VT/ME) | NNE1996 | 2A | N |

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# More Information

▸ For questions or issues with ESS, please contact the Collections Manager, James Reagan at (978) 752-1163.