
Employer Self-Service (ESS) Guide

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

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Introduction

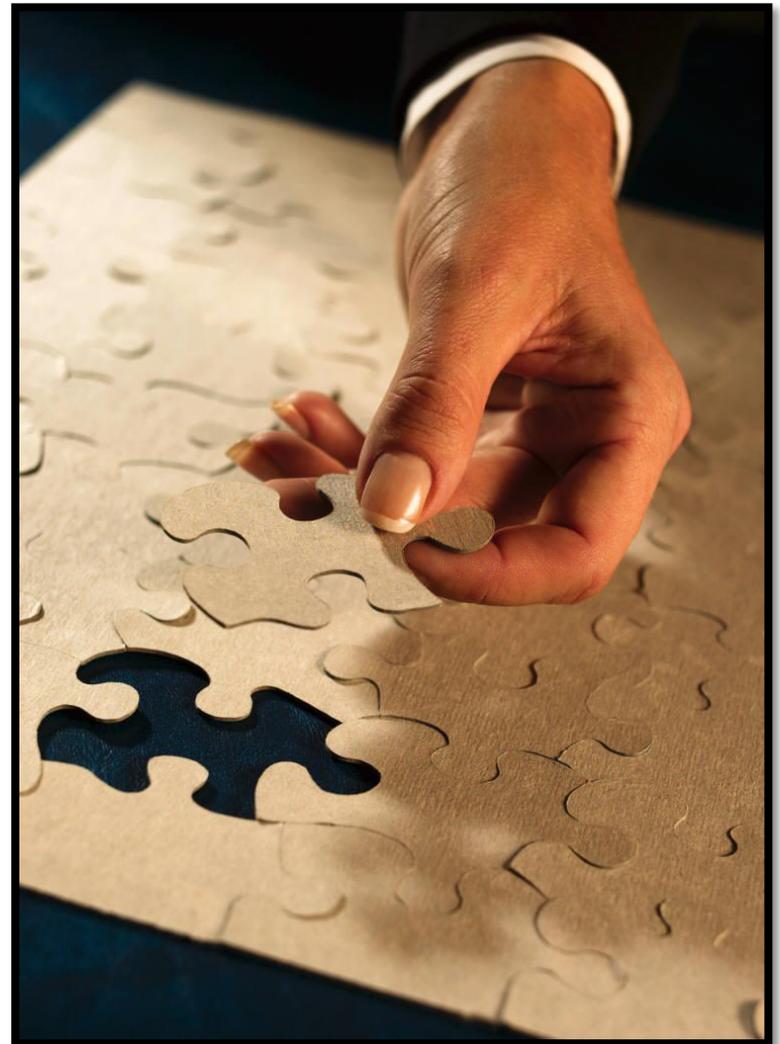
- ▶ In August 2015, the Employer Self-Service (ESS) portal has been upgraded to simplify the process of submitting Carpenter's fringe benefit hours.
- ▶ Employers already familiar with ESS will find the latest updates to be helpful improvements!
- ▶ Employers new to ESS can use this presentation to learn how to upload and download Work Reports.

Improvements

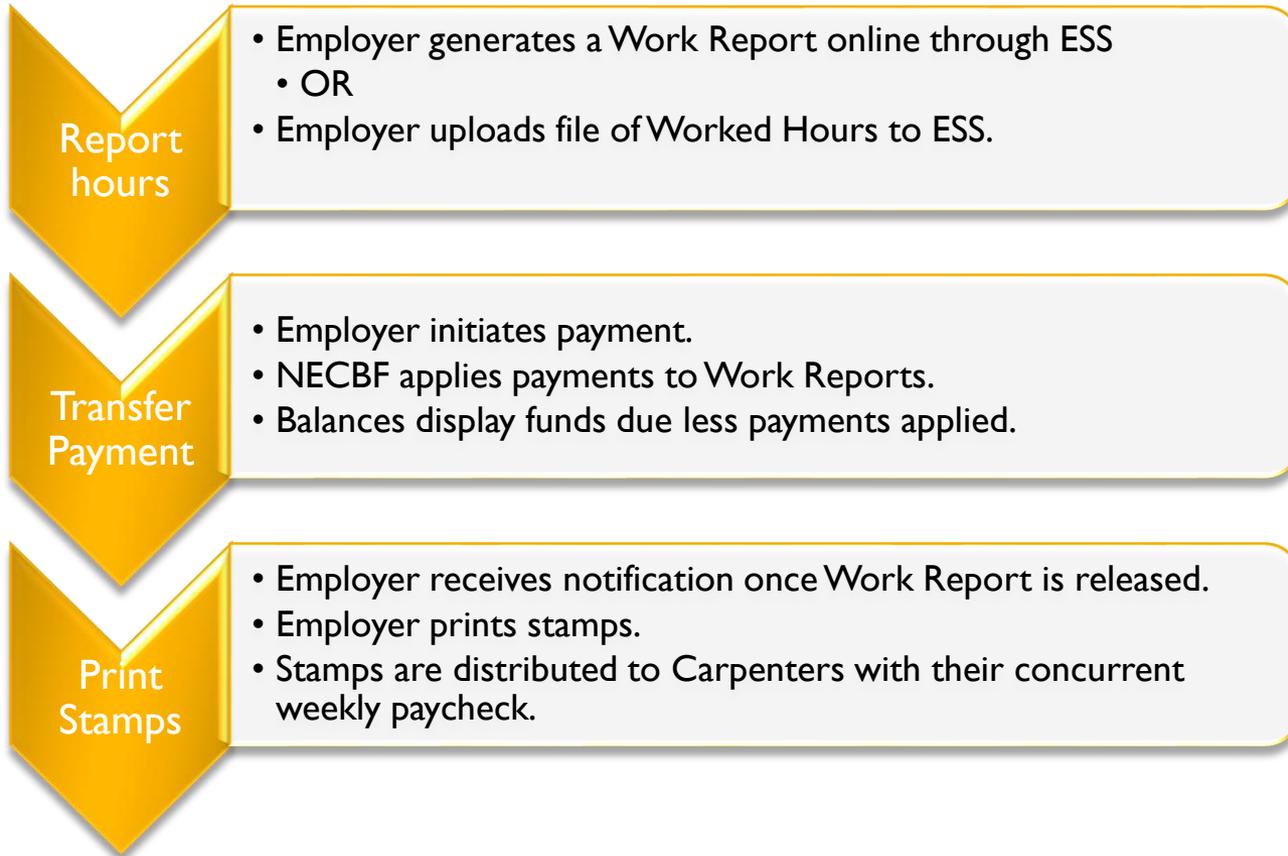
- ▶ Improved ways to locate and view items!
 - ▶ Account Transactions Page:
 - It's easier to find Open and Closed Transactions with enhanced filtering based on Status.
 - ▶ Stamps Page:
 - Added search capabilities by received or paid date and Print Status to quickly identify which Stamps to print.
- ▶ 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



Vocabulary

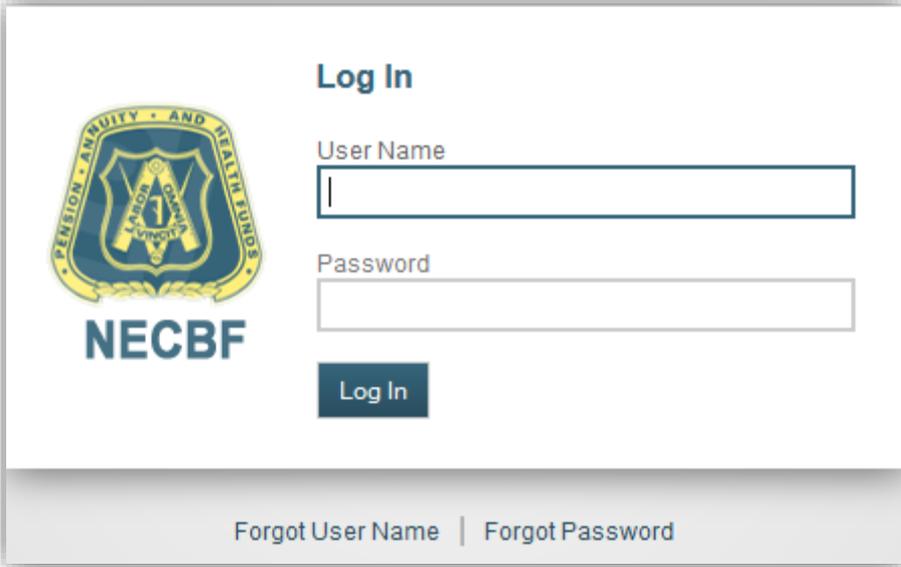
- ▶ ESS – Employer Self-Service website is used to manage reporting of Carpenters Union member's hours worked.
- ▶ NECBF – New England Carpenters Benefit Funds
- ▶ NECCA – New England Carpenter's Central Collection Agency.
- ▶ Work Report – A report of the hours worked by a member of the Carpenter's 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.



Log In

User Name

Password

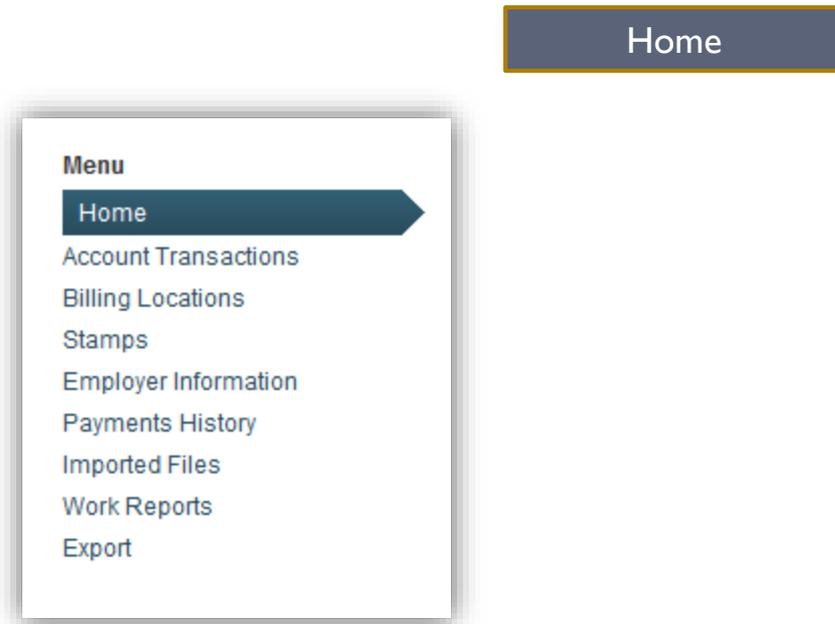
Log In

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

- 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:



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

NEW ENGLAND CARPENTERS BENEFIT FUNDS

A0052 - ABC ASSOCIATES, INC. [Change Account]

Welcome Robyn Test 07/27/2015

Last Logon 07/14/2015 | Account Settings | Logout

Shortcuts

- Create New Work Report
- Import a File

Menu

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

Home

Welcome to V3 Employer Self Service.

News

Alerts

Account Balances

A list of employer accounts and their current balance. To view the details of the balance please click the 'Transactions' link. To view more information about the account click the 'Profile' link.

Account Name	Account Number	Balance	As Of	Actions
ABC ASSOCIATES, INC. - E WEEKLY	A0052E	(43.69)	07/23/2015	Transactions Profile
ABC ASSOCIATES, INC. - MONTHLY	A0052M	\$0.00		Transactions Profile
		(43.69)		

Showing Records 1 - 2 of 2

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

NEW ENGLAND CARPENTERS BENEFIT FUNDS

Last Logon 07/27/2015 | Account Settings | Logout

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

Shortcuts

- Create New Work Report
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Menu

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Below is a list of account transactions that belong to the selected account.

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

Balance: All Balances
Type: All
Date Range: Last 12 Months
Status: Open

Total Original: (\$43.69)
Total Balance: (\$43.69)

Filter Records Export

Date	Type	Description	Original	Balance	Actions
07/23/2015	Payment	Payment 07/23/2015	(\$200.00)	(\$48.80)	▼
05/10/2015	Work Report	2015-05-10 - 2015-05-16 Floorcoverers	\$151.20	\$0.00	▼
07/19/2015	Work Report	2015-07-19 - 2015-07-25 Woodframe UBC Agreement	\$5.11		View Allocation Details
			(\$43.69)	(\$43.69)	

Showing Records 1 - 3 of 3

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.

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.



A0052 - ABC ASSOCIATES, INC. [Change Account]

Welcome Robyn Test 07/27/2015

Shortcuts

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Account Transaction Details

Account: A0052E ABC ASSOCIATES, INC. - E WEEKLY



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

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

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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

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

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

Please note that the primary email can only be changed by CCA.

Showing Records 1 - 1 of 1

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.)

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

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Stamps

This is a list of stamps that belong to your Company. To search for an item, select search criteria from the menus below and click Search. To view an item, either click on the file icon or on the item name. Clicking on Details next to the item displays more information about it.

Billing Location:

Status: Date Range:

Document/Image Type	Doc Received Date	Status	Description	Document Image Id
Work_Report_Confirmation_Receipt	Apr 15, 2011	Printed	Work_Report_Confirmation_Receipt	Details
Work_Report_Confirmation_Receipt	Apr 15, 2011	Printed	Work_Report_Confirmation_Receipt	Details
Work_Report_Confirmation_Receipt	Apr 4, 2012	Printed	Work_Report_Confirmation_Receipt	Details
Work_Report_Confirmation_Receipt	Apr 24, 2012	Printed	Work_Report_Confirmation_Receipt	Details
Work_Report_Confirmation_Receipt	Apr 27, 2012	Queued	Work_Report_Confirmation_Receipt	Details
Work_Report_Confirmation_Receipt	Apr 27, 2012	Queued	Work_Report_Confirmation_Receipt	Details

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.

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

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Employer Information

This screen contains basic information about your employer. If the information is out-of-date or incorrect, please contact the fund office.

Demographics

Code: A0052 Name: ABC ASSOCIATES, INC.

Address

Primary
185 ALEWIFE BRK AVE
STE 4200
CAMBRIDGE, MA US 02138-0000

Phone:

Phone: (781) 726-0552 UNITED STATES

Email:

Primary: v3test@carpentersfund.org

Contacts

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

Records Export

Name	Phone	Email	Action
Test, Robyn			Edit Delete

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.

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

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Payment History

Below is a history of payments that have been made by your employer.

All

Records Export

Deposit Date	Payment Type	Fund	Payment Amount	Remaining Amount
07/23/2015	Check	NECARP Holding Fund	\$200.00	\$48.80
				<hr/> 48.80

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.

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

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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.

Billing Location:

Work Reports

Date Range: Type:

<input type="checkbox"/>	Date	Period	Type	Description	Due	Actions
<input type="checkbox"/>	04/01/2015	04/01/2015	Adjustment	2015-04-01 - 2015-04-01 Floorcoverers	\$0.00	Details
<input type="checkbox"/>	04/30/2015	04/26/2015	Regular	2015-04-26 - 2015-05-02 Floorcoverers	\$0.00	Details
<input type="checkbox"/>	07/04/2015	05/03/2015	Regular	2015-05-03 - 2015-05-09 Floorcoverers	\$0.00	Details
					\$0.00	

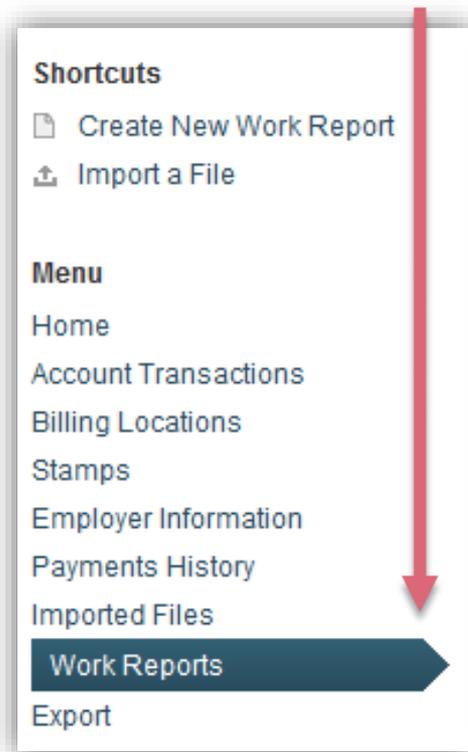
Showing Records 1 - 3 of 3

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

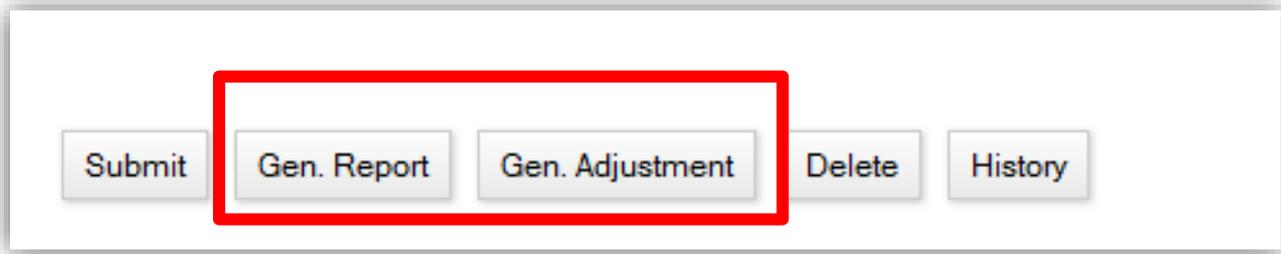
- ▶ An alternative method to uploading a file is to fill-out the Work Report online through the ESS website.
- ▶ The process to upload a Work Report file is as follows:
 - ▶ Step 1: Click on **Work Reports** menu in left navigation.



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.



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.

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.

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

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Create Work Report Online

You have chosen to manually create a work report online. First fill out the work report details. Then select the accounts that you wish to generate work reports for.

Billing Location:

Accounts

To create work reports for multiple accounts, select the desired accounts in the grid and then click the 'Create Work Report' button.

<input type="checkbox"/>	Billing Location Name	Agreement	Last Report Period	Start Date	Messages
<input type="checkbox"/>	ABC ASSOCIATES, INC. - E WEEKLY	FLOOR - Floorcoverers	01/11/2015	<input type="text" value="01/18/2015"/>	
<input type="checkbox"/>	ABC ASSOCIATES, INC. - E WEEKLY	MILL - Millwrights	04/15/2012	<input type="text" value="04/22/2012"/>	
<input checked="" type="checkbox"/>	ABC ASSOCIATES, INC. - E WEEKLY	BOS - NERCC Boston	01/04/2015	<input type="text" value="01/11/2015"/>	

25 Page 1 of 1 Showing Records 1 - 18 of 18

Create Work Report

Click Create Work Report button.

24 NECBF - Confidential 8/17/2015 Update v9.10

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 07/27/2015

Work report generated successfully.

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.

Billing Location:

Work Reports

Date Range: Type:

<input type="checkbox"/>	Date	Period	Type	Description	Due	Actions
<input type="checkbox"/>	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

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.

Criteria

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

Agreement: FLOOR - Floorcoverers

Job Category: Journeyman

Report Start Date: 04/26/2015 Report Stop Date: 05/02/2015

Payroll Date: mm/dd/yyyy

Batch No: 650939 Billing Type: Contribution

Member Count: 1 Row Count: 1

Report Status: Initial

Report Source: 1 - Employer

Date Received: mm/dd/yyyy

Contribution Date: mm/dd/yyyy

Due Date: 05/17/2015

Date Released:

User Released:

Trans#: 80984955

Type: Work Report

Identifier: 2015-04-26 - 2015-05-02 Floorcoverers

Report Release Code:

Work History

Actions Seq No Name/Search UBC ID Start Date Stop Date Small Desc Hours Total Rate LOCAL Lay-Off MOF

Actions	Seq No	Name/Search	UBC ID	Start Date	Stop Date	Small Desc	Hours	Total Rate	LOCAL	Lay-Off	MOF
		U11111133	U11111133	04/26/2015	05/02/2015	ACT			2168		
		TEST, ROBTN	U11111122	04/26/2015	05/02/2015	ACT	40.00	31.49	2168		
							40.00				

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.

NEW ENGLAND CARPENTERS BENEFIT FUNDS

A0052 - ABC ASSOCIATES, INC. [Change Account] Welcome Robyn Test 08/17

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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.

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

Work Reports

Date Range: Last 12 Months Type: All

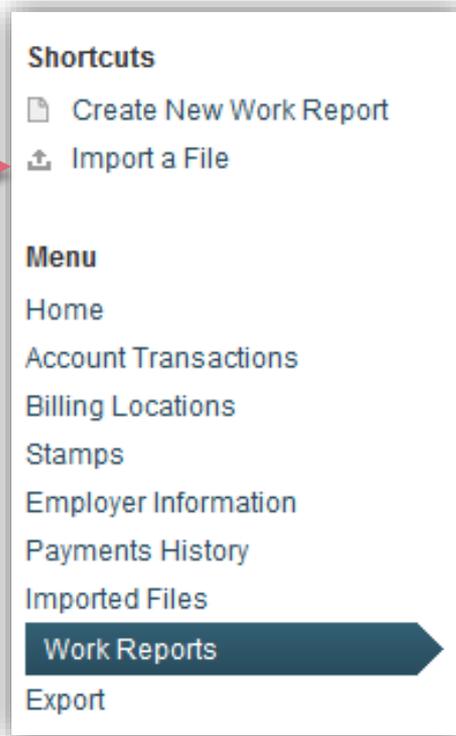
<input type="checkbox"/>	Date	Period	Type	Description	Due	Actions
<input checked="" type="checkbox"/>	04/30/2015	04/26/2015	Regular	2015-04-26 - 2015-05-02 Floorcoverers	\$2,519.20	Details
<input type="checkbox"/>	04/01/2015	04/01/2015	Adjustment	2015-04-01 - 2015-04-01 Floorcoverers	\$0.00	Details
					\$2,519.20	

Showing Records 1 - 2 of 2

Submit Gen. Report Gen. Adjustment Delete History

Work Report Method 2: Upload Process – Step 1

- ▶ The process to upload a Work Report file is as follows:
 - ▶ Step 1: Click on **Work Reports** menu in left navigation.



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.

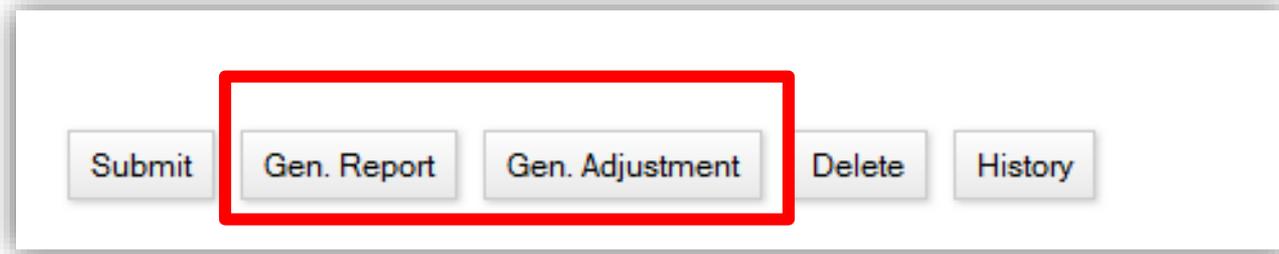
EMPLOYER CODE	LAST NAME	FIRST NAME	MIDDLE INITIAL	SUFFIX	UBC ID	AGREEMENT	JOB CATEGORY	START DATE	STOP DATE	HOURS	LOCAL	LAY-OFF	MOF
A0000	TEST	TEST	T		U11111111	BOS	JM	6/21/2015	6/27/2015	48	33	N	N
A0000	TEST	TEST	J		U11111112	BOS	4A	6/21/2015	6/27/2015	34	33	N	N

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:

File Type:

File: 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**

Imported Files

Below are the details of the file that has been uploaded for processing. Errors on the Import File can be viewed by clicking the Details link for the corresponding Import File and then clicking the 'View Errors' button. Imports which have been 'Processed Successfully' have generated a Pre-Bill Work Report which can be viewed under Work Reports and then clicking the 'History' button.

Status:
Date Range:

[Upload New File](#) [Refresh](#)

[Records](#) [Export](#) [View Report](#)

Date	Type	Description	Status	Records	Action
12/10/2013	Work Report Import ESS	Western MA 12-7-13	Processed Successfully	36	Details
04/10/2013	Work Report Import ESS	WEEKENDING 4-6-13	Processed Successfully	124	Details

Showing Records 1 - 2 of 2

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

Below are the details of the file that has been uploaded for processing. Errors on the Import File can be viewed by clicking the Details link for the corresponding Import File and then clicking the 'View Errors' button. Imports which have been 'Processed Successfully' have generated a Pre-Bill Work Report which can be viewed under Work Reports and then clicking the 'History' button.

Status:
Date Range:

Records

Date	Type	Description	Status	Records	Action
07/27/2015	Work Report Import ESS	test	Processed with Errors	1	Details

Showing Records 1 - 1 of 1

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.

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Imported Files

Below are the details of the file that has been uploaded for processing. Errors on the Import File can be viewed by clicking the Details link for the corresponding Import File and then clicking the 'View Errors' button. Imports which have been 'Processed Successfully' have generated a Pre-Bill Work Report which can be viewed under Work Reports and then clicking the 'History' button.

Status: Date Range:

Date	Type	Description	Status	Records	Action
07/17/2015	Work Report Import ESS	test	Processed with Errors	13	Details
07/17/2015	Work Report Import ESS	Test	Processed with Errors	13	Details
07/17/2015	Work Report Import ESS	Test	Processed with Errors	13	Details
07/17/2015	Work Report Import ESS	test	Processed with Errors	13	Details
07/17/2015	Work Report Import ESS	Three & Four test	Processed with Errors	13	Details

Showing Records 1 - 5 of 5

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](#)
[Stamps](#)
[Employer Information](#)
[Payments History](#)
[Imported Files](#)
[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: Search Field: Search Text:

Filter Records

<input type="checkbox"/>	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
<input type="checkbox"/>	1	Processed Successfully	<input checked="" type="checkbox"/>	EMPLOYER CODE	LAST NAME	FIRST NAME	MIDDLE INITIAL	SUFFIX	UBC ID	AGREEMENT	JOB CATEGORY	START DATE	STOP DATE	HOURS	LOCAL	LAY-OFF	MOF
<input type="checkbox"/>	2	Processed With Errors	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/06/2014	04/12/2014	100	33	N	N
<input type="checkbox"/>	3	Validated Successful	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/13/2014	04/19/2014	50	33	N	N
<input type="checkbox"/>	4	Validated Successful	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/20/2014	04/26/2014	50	33	N	N
<input type="checkbox"/>	5	Validated Successful	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/27/2014	05/03/2014	100	33	N	N
<input type="checkbox"/>	6	Processed With Errors	<input checked="" type="checkbox"/>	A0052	FOUR	MEMBER			U00000004	BOS	4A	04/06/2014	04/12/2014	100	33	N	N
<input type="checkbox"/>	7	Processed With Errors	<input checked="" type="checkbox"/>	A0052	FOUR	MEMBER			U00000004	BOS	4A	04/13/2014	04/19/2014	100	33	N	N
<input type="checkbox"/>	8	Processed With Errors	<input checked="" type="checkbox"/>	A0052	FOUR	MEMBER			U00000004	BOS	4A	04/20/2014	04/26/2014	100	33	N	N
<input type="checkbox"/>	9	Processed With Errors	<input checked="" type="checkbox"/>	A0052	FOUR	MEMBER			U00000004	BOS	4A	04/27/2014	05/03/2014	100	33	N	N
<input type="checkbox"/>	10	Processed With Errors	<input checked="" type="checkbox"/>	A0052	FOUR	MEMBER			U00000004	BOS	4A	10/05/2014	10/11/2014	100	33	N	N

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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Shortcuts

- Create New Work Report
- Import a File

Menu

- Home
- Account Transactions
- Billing Locations
- Stamps
- Employer Information
- Payments History
- Imported Files
- 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:
 Type: Work Report Import ESS Process Start:
 Status: Processed with Errors Process Stop Date:
 Description: test Progress Rpt:

Import Details

Process Flag: All
 Search Field: Search Text:

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
1	Processed Successfully	<input checked="" type="checkbox"/>	EMPLOYER CODE	LAST NAME	FIRST NAME	MIDDLE INITIAL	SUFFIX	UBC ID	AGREEMENT	JOB CATEGORY	START DATE	STOP DATE	HOURS	LOCAL	LAY-OFF	MOF
2	Processed With Errors	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/06/2014	04/11/2014	100	33	N	N
3	Validated Successful	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/13/2014	04/19/2014	50	33	N	N
4	Validated Successful	<input checked="" type="checkbox"/>	A0052	THREE	MEMBER			U00000003	BOS	JM	04/20/2014	04/26/2014	50	33	N	N

ImportError - Mozilla Firefox

necbf-v3-web3i/v3.dev6/app?service=external/EmployerPages:ImportErrors&sp=1

Errors

Records Export

Seq No	Number	Data String	Type	Message
2	1	A0052 THREE MEMBER U00000003 BOS JM04/06 /2014041/22/014 100 33 N N	pfc_systemerror	The Stop Date must have '/' to separate day, month, and year. Acceptable formats are mm/dd/yyyy or m/d/yyyy
6	1	A0052 FOUR MEMBER U00000004 BOS 4A04/06 /2014041/22/014 100 33 N N	pfc_systemerror	The Stop Date must have '/' to separate day, month, and year. Acceptable formats are mm/dd/yyyy or m/d/yyyy

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.

The screenshot shows the user interface for the New England Carpenters Benefit Funds. At the top, there is a header with the logo and the text "NEW ENGLAND CARPENTERS BENEFIT FUNDS". On the right side of the header, it says "Last Logon 08/14/2015 | Account Settings | Logout". Below the header, the user's account information is displayed: "A0052 - ABC ASSOCIATES, INC. [Change Account]" and "Welcome Robyn Test 08/17/2015".

The main content area is titled "Exports" and contains a list of exports. A dropdown menu is set to "All". There are buttons for "New Export" and "Refresh". Below these are icons for "Records" and "Export". A table lists the exports:

File	Status	Export Date	Exported Rows	Saved Rows
ESS Work Report Template Export	Processed Successfully	09/15/2012 09:13	6	6

At the bottom right of the table, it says "Showing Records 1 - 1 of 1".

The left navigation menu includes: Shortcuts (Create New Work Report, Import a File), Menu (Home, Account Transactions, Billing Locations, Stamps, Employer Information, Payments History, Imported Files, Work Reports, **Export**).

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

Agreement Codes

Floorcoverers Cosmetic	FLOORCOS	JM	X
Floorcoverers Cosmetic	FLOORCOS	IA	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	IA	W
Millwrights	MILL	2A	W
Millwrights	MILL	3A	W
Millwrights	MILL	4A	W

Agreement Codes

Agreement Name	Agreement Code	Job Category	Stamp Code
Northern New England LU 118 (NH)	NNEI118	JM	N
Northern New England LU 118 (NH)	NNEI118	IA	N
Northern New England LU 118 (NH)	NNEI118	2A	N
Northern New England LU 1996 (VT/ME)	NNEI1996	JM	N
Northern New England LU 1996 (VT/ME)	NNEI1996	IA	N
Northern New England LU 1996 (VT/ME)	NNEI1996	2A	N

More Information

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