

Getting to Know EmployerXG

An easy to follow guide to help successfully report online

<https://employer.gobasys.com/BPA/Login/Login.aspx>

The fastest solution for employer remittance



Submit your remittance information easily and securely via the Internet.

All you need is an Internet connection.

You're in control. You tell us when to process the remittance and payment.

Spend more time working and less time reporting, with no errors or cumbersome calculations.

Getting started takes less than a minute.

The fastest solution for employer remittance



Join the growing number of union employers already enjoying the convenience of remitting online.

Load remittance data any way you want; payroll files, old reports, or start from scratch.

Easily edit data the moment it's entered to ensure accuracy.

See exactly what you owe instantly, based on your effective collective bargaining agreement.

Control when you submit and when you pay.

The fastest solution for employer remittance



Information Security and Privacy are our priority. We promise to keep your information protected and private.

Privacy: Safeguarding your information is our top job. See our privacy practices to understand how we protect your information.

Security: You can feel confident using this site's services anywhere and anytime. See our security practices to understand the many ways we secure your information.

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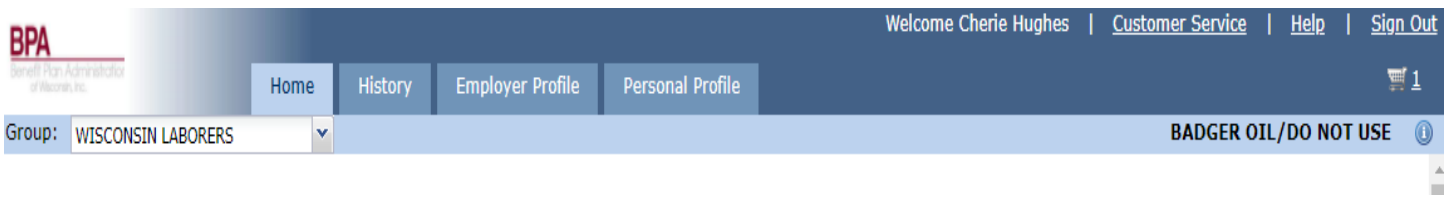
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Toolbar

- **Group** – Get signed up with all your union trades that Benesys handles and remit all of them online.
 - You will need to contact the fund office for each trade to get signed up if you are going to do all your union remittances online
 - Some laborer funds, like 113 pension, will still need to be sent via mail as it goes to a separate entity.
 - You can switch between the unions using the drop-down box
- **Customer Service Link** – Access Frequently Asked Questions (FAQs)
- **Help** – Basys EmployerXG Quick Guide
- **Sign Out**
- **Cart Icon** – shows the number of remittances in the cart.
 - If you hover over the cart icon you will get the total amount due and a button to Proceed to Payment.

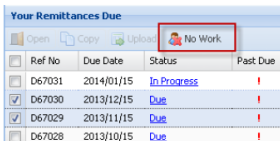


Screen Tabs

➤ **Home** – Where your current due and in progress remittance will show

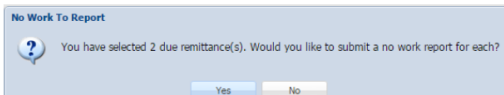
What Can I Do Here?

- 1. Open Remittances** – double click on the remittance you want to open
 - a. You will be able to view any in progress or due remittances
 - b. See “All About Your Remittances” for more details
- 2. Copy an Existing Remittance** – Great tool if you are using the same employees for a different remittance.
 - a. Check the remittance you want to put the copied information into
 - b. A pop-up window will appear and allow you to select the previous remittance you would like to pull the information from
 - c. Note only the social/names will transfer so you will need to enter in the hours for each person for the new remittance



Ref No	Due Date	Status	Past Due
<input type="checkbox"/> D67031	2014/01/15	In Progress	!
<input checked="" type="checkbox"/> D67030	2013/12/15	Due	!
<input checked="" type="checkbox"/> D67029	2013/11/15	Due	!
<input type="checkbox"/> D67028	2013/10/15	Due	!

The **No Work To Report** popup box displays (see following screen). Note that the No Work option is disabled for remittances that are In Progress.



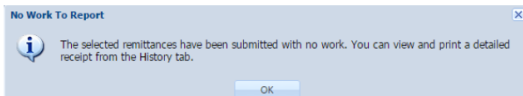
No Work To Report

?

You have selected 2 due remittance(s). Would you like to submit a no work report for each?

Yes No

If you click "Yes," you receive the following popup (see following screen). (If you select "No," the selected remittance are not submitted with no work.)



No Work To Report

i

The selected remittances have been submitted with no work. You can view and print a detailed receipt from the History tab.

OK

3. Create a No Work Remittance

- a. Check mark all that you would like to report as no work – Note that the remittance must have a status of Due – See **All About Your Remittances** for more information
- b. Select the No Work link that is located at the top of the remittance due box
- c. Follow the prompts to complete the no work submission
- d. You will know it is complete when the remittance is no longer on your Home Tab

- 4. Submitted Remittances Panel** – located on the right side of your Home Tab screen
 - a. This panel only appears if there are recent remittances to display
 - i. Get a full list of submitted online remittances on your History Tab
- 5. News & Information** – located on the right side of your Home Tab screen
 - a. This is a great place to check for any current information
 - i. Who to contact with any online issues
 - ii. Website links for local area maps and wage rates

All About Your Remittances

1. Your Remittances Due

- a. Ways to open your remittances from the home tab
 - i. By selecting the checkbox to the left of the remittance and then clicking the open button located at the top of the box
 - ii. By clicking on the status
- b. Status types you will find on Your Remittance Due grid:

	Ref No	Due Date	Status	Past Due
<input type="checkbox"/>	C51968	04/17/2017	Scheduled	!
<input type="checkbox"/>	G64744	08/15/2017	In Cart	!
<input type="checkbox"/>	G72039	11/15/2017	Saved For Later	!
<input type="checkbox"/>	G64749	01/16/2018	In Progress	!
<input type="checkbox"/>	G64746	10/16/2017	In Progress	!
<input type="checkbox"/>	G72042	02/15/2018	Due	
<input type="checkbox"/>	G68326	02/15/2018	Due	

- i. Due- a remittance that is created by the system
 - This will open up to your Employee Details screen
 - Note delinquent remittances are indicated by a red exclamation point
- ii. In Progress- a remittance that has been started. This will open into the Employee Details screen
 - If you enter a due remittance and then go back to the home page the remittance will auto status change to in progress
- iii. Saved for Later – remittances that are complete but not ready to be submitted. This will prompt to:
 - Edit Remittance – opens the Employee Details screen
 - View Employee Detail – opens the Employee Details Screen in read-only mode
 - Open Cart – opens the Cart screen
- iv. Scheduled – the remittance has been submitted for processing with a future payment date. This will prompt to:
 - Edit Remittance – opens the Employee Details screen
 - View Employee Details – opens the Employee Details screen in a read-only mode
 - Print Confirmation – will print the confirmation page

Note: any time you edit a scheduled remittance, it removes the scheduled date. You will have to reschedule the payment for processing

2. Employee Details Page – detail screen for the remittance. You can do the following:

- a. Add/remove employees on the remittance
 - i. To add employee: simply select a new row, add employee’s social and hours reporting
 - ii. To remove employee: check the employee you would like to remove and then select the remove button at top of the grid
- b. Update hours reported

- i. Click on the hours you are changing and type the new amount
- ii. All calculations at the bottom of the grid will auto fix
- c. Print employees prior to submitting the remittance
 - i. To print select the export button at the bottom of the grid
 - This will create a CSV file that you are able to print
- d. Add the remittance to the cart – this button gives you two options to choose from
 - i. Return Home to Complete Additional Remittances – You can add multiple remittances to the cart and submit one payment
 - ii. Proceed to Cart – will take you directly to the cart for payment
 - If you need to make updates to a remittance that is in your cart – Find the remittance on your Home Tab
 - The status should be In Cart
 - Once on the Employee Detail Page select Update at the bottom of the grid
- e. View totals for the remittance by fund, quantity, and rate
 - i. You can select how you view the remittance summary – this is located at the bottom of the remittance screen

Remittance Summary		
Summary by:	Fund	Amount Due
Fund	Fund	
WISCONSIN LABORE	Quantity	\$0.00
HRA	Rate	\$0.00
WISCONSIN LABORERS PENSION FUN		\$0.00
DUES		\$0.00
APPR		\$0.00
Totals:		\$0.00

- f. Delete remittances
 - i. If you enter a remittance by accident or need to delete for other reasons you will need to:
 - Enter the remittance
 - Scroll to the bottom of the grid
 - Select Delete
 - Following any pop-up boxes
 - ii. Once deleted, the remittance will show “due” on your home screen
 - iii. Make sure to either resubmit the remittance with correct hours etc. or submit it as a “no work”

➤ History – View and print receipts or confirmation pages.

1. View and print a receipt of a selected historical remittance

- a. You can look up a remittance many ways:
 - i. By year – located at top left corner of grid with a drop-down screen
 - ii. By reference number
 - iii. By work period
 - iv. By received date
 - v. By total amount

Note: You can sort ascending, descending, or custom filter by selecting the drop-down arrow when selecting the main header

- b. You can download remittance receipts
 - i. Select remittance
 - ii. Select receipt located on the top right of grid

2. Access an Excel listing of employees associated with a selected remittance

3. Access submitted remittances history

➤ Employer Profile – Manage user access

1. Primary address

2. Employer Contacts

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

- a. Lists of everyone who has access to your online portal
 - i. Name
 - ii. Contact Type
 - iii. Email
 - iv. Phone Number
- b. You can add additional people to your online portal
 - i. Select the add button at the top of the Employer Contacts grid

- ii. Fill out the contact form
- iii. Check mark the “send employerg invitation email”

- iv. Select the user’s role
 - Administrator – Full Access
 - a) Complete and pay for remittances
 - b) See remittance history
 - c) Export/print information
 - d) Has the ability to make changes to account information
 - Operator
 - a) Has the ability to complete remittances
 - b) Pay for remittances
 - c) See remittance history
 - d) Print information
 - Operator – History Only
 - a) Can only see remittance history
 - b) Print information
 - c) This role cannot complete or pay for remittances or make any changes to account

3. Your Preferences

- a. Copy Remittance Options
 - i. This is how you would like information share from one remittance to the next for the same agreement.
 - Employee ID, Name, and Quantities
 - Employee Id and Name Only
- b. Default Group
 - i. This allows you to pick which union group you would like to have pull up when you initially sign into your online portal
 - ii. If you only have one union group to report online, they will automatically be your default group
- c. Scheduled Payment Confirmation
 - i. This allows you to choose who gets the confirmation email when your payment has been successfully scheduled
 - Primary Contact Only
 - Employer Administrators
 - All Portal Users – anyone associated on your online account
- d. Remittance Processed Alert

- i. This allows you to choose who gets the confirmation email when your payment has been successfully processed
 - Primary Contact Only
 - Employer Administrators Only
 - All Portal Users – anyone associated on your online account

4. Your Bank Account

- a. You can do direct withdrawn from a bank account instead of sending a check in the mail

- i. Enter the following information:
 - Bank Name
 - Routing Number
 - a) You will need to enter this information twice and they must match
 - Account Number
 - a) You will need to enter this information twice and they must match
 - Account Type
 - a) Checking
 - b) Savings

- b. You can disable your ACH account by checking the “disable account”

- i. If you do this, you will need to send in a check for payment with any remittances processed after you select this
- ii. If you select this after you process your remittance it will automatically still withdrawal the amount from your account
- iii. If you select to disable the account and then schedule a payment, you will need to make sure you:
 - Do not reactivate account until scheduled payment is processed on scheduled date
 - All remittances entered between initial scheduled remittance and the scheduled date will all need to be paid by check

Note: If you want to reactivate the ACH withdrawal, simply uncheck the “disabled account” box. Do not do this until all scheduled payments have been processed.

➤ Personal Profile – Update Personal Details

1. This is where personal contact information is
 - c. This can be updated by anyone with access to the specific account that is signed in
 - d. If you have multiple operators on the account, they can update their own information as needed under their personal sign in accounts

Group: FLORIDA CEMENT MASONS

Contact Information

* = Required

First Name*: ANNE

Last Name*: SMITH

Generation: Select a Generation...

Title: Select a Title...

Contact Type: ACMI

E-mail*: anne@FLCEMAS.com

Phone Number:

Phone Number (Alt):

Save Cancel

User Information

* = Required

Username*: anneamp

Old Password:

New Password:

Confirm Password:

Challenge Question 1*: Select a Challenge Question 1...

Challenge Answer 1*:

Challenge Question 2*: Select a Challenge Question 2...

Challenge Answer 2*:

Save Cancel

➤ Shopping Cart – Pay multiple remittances at once

Remittances In Cart

Payment Date: 05/27/2021 Select All Due Select All Due + Damages Collapse All

Reference Number	Work Period	Description	Employer Number	Due Date	Payment Amount
GZ1789	201808 08/01/2018 - 08/31/2018	WL14...	014300	09/17/2018	DUE \$18.57

Due \$18.57

Due + Damages \$18.57

Edit Review Save

1. Remittances in Cart - See all remittances you are paying for
 - a. Select the payment date
 - i. You can either pay the same day
 - ii. You can select a future date
 - b. You can select pay all dues or select all dues + damages (this will only be an option if your remittance is paid late)
 - i. If you are paying an overdue remittance, a pop-up window will appear each time you go to your cart until that remittance is paid for
 - ii. Also, if you don't select to pay the damages, you will get a over/under letter from the fund requesting the payment
 - iii. You can also select:
 - Edit – to pull up the remittance and adjust as needed
 - Review – to pull up the remittance and double check the information
 - a) Note you will not be able to edit in this screen
 - Save – This will save any changes/additions you make to your cart to come back and make a payment/adjustment later
 - Remove – This will remove the remittance from your cart, but remittance will still show “in progress” on your home page
 - b) See “All about remittances” for further information on how to delete the report to make it show “due”

2. Payment Summary

a. Shows all remittances you are paying for with the following information:

- i. Payment date
- ii. Reference number
- iii. Work period
- iv. Payroll date
- v. Payment amount
- vi. Payment method

Payment Summary				\$18.57
Payment Date :		05/27/2021		
Reference Number:	Work Period	Payroll Date	Payme	
GZ1789	201808	08/01/2...	\$18...	
Payment Method:* EFT				
Summary :				\$18.57
Summary By Fund		Apply Payment		

- EFT – ACH withdrawal from your account
- Check – Send in a check for total amount due with a printed copy of the remittance(s) it is covering

b. Summary

- i. This shows the total amount you are paying for

c. Summary by Fund

- i. Shows how much you are paying for each fund i.e. health, HRA, etc.

d. Apply Payment

The Confirmation Window when applying a payment

Payment Confirmation

Remittance Count: 2

Remittance Amount Due: \$44,620.00

Damage Amount Due: \$2,361.15

Total Amount Due: \$46,981.15

Total Amount Paid: \$44,620.00

Payment Date: 01/19/2018

Payment Method: Check

Press OK to confirm payment or Cancel to review your work.
After confirming you will be able to print a detailed payment receipt from the History tab.

i. A payment confirmation window will pop-up with:

- Number of remittances you are paying for
- Remittance amount due
- Amount of damages due (if applicable)
- Total amount due (remittance amount + damages)
- Payment date
 - a) If you selected a future payment date, confirm the date is correct
- Payment method

ii. If everything looks right, you will select OK to process the payment

- Once processed a confirmation email will be sent
 - a) Note if you scheduled a future payment you will get an email regarding the scheduled payment and another once the payment has successfully processed on the future date
 - b) You can also print a detailed payment receipt from the History tab
 1. If you are paying by check this will need to be mailed in with the check to ensure accurate processing

iii. If you think changes need to be made hit cancel, and then edit as needed

- Remember if you change anything to a remittance you have scheduled for a future date you will need to re-enter the future date when you are ready to process the payment