EIT BENEFIT FUNDS
EMPLOYER SELF-SERVICE
USER’S GUIDE

Version 10.0.2

TABLE OF CONTENTS

1 INTRODUCTION

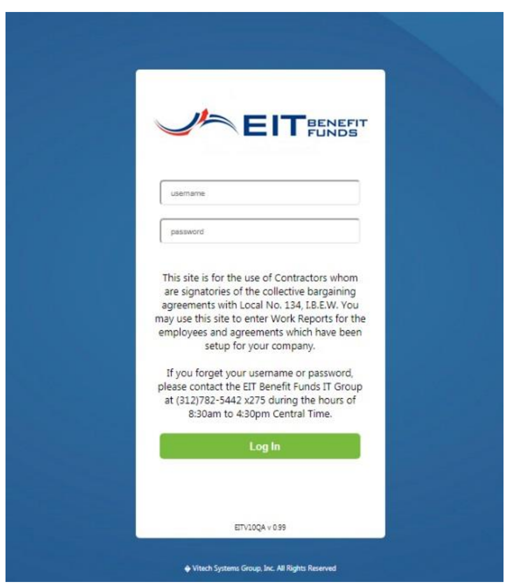
The EIT Employer Self-Service (ESS) website has been designed to work with all modern browsers including Google Chrome, Mozilla Firefox, Microsoft Internet Explorer and Microsoft Edge. We recommend that you keep your browser up to date with the auto-update feature included in most browsers. While we cannot guarantee compatibility with all future browser versions, the Java platform on which the site is built allows for the most flexibility across different browsers. **Our preferred browser for performance and the fewest issues is currently Google Chrome.**

When using the User’s Guide please keep in mind that some of the screen shots might be slightly different and minor changes to the steps may not be reflected in this version of the guide. We will be constantly updating the user guide as the new information is available and/or changes are made. The updated User’s Guide will be posted on our web site as soon as possible. Please visit our website on regular basis to check if a new version is available. The updated version numbers will be posted and titled accordingly.

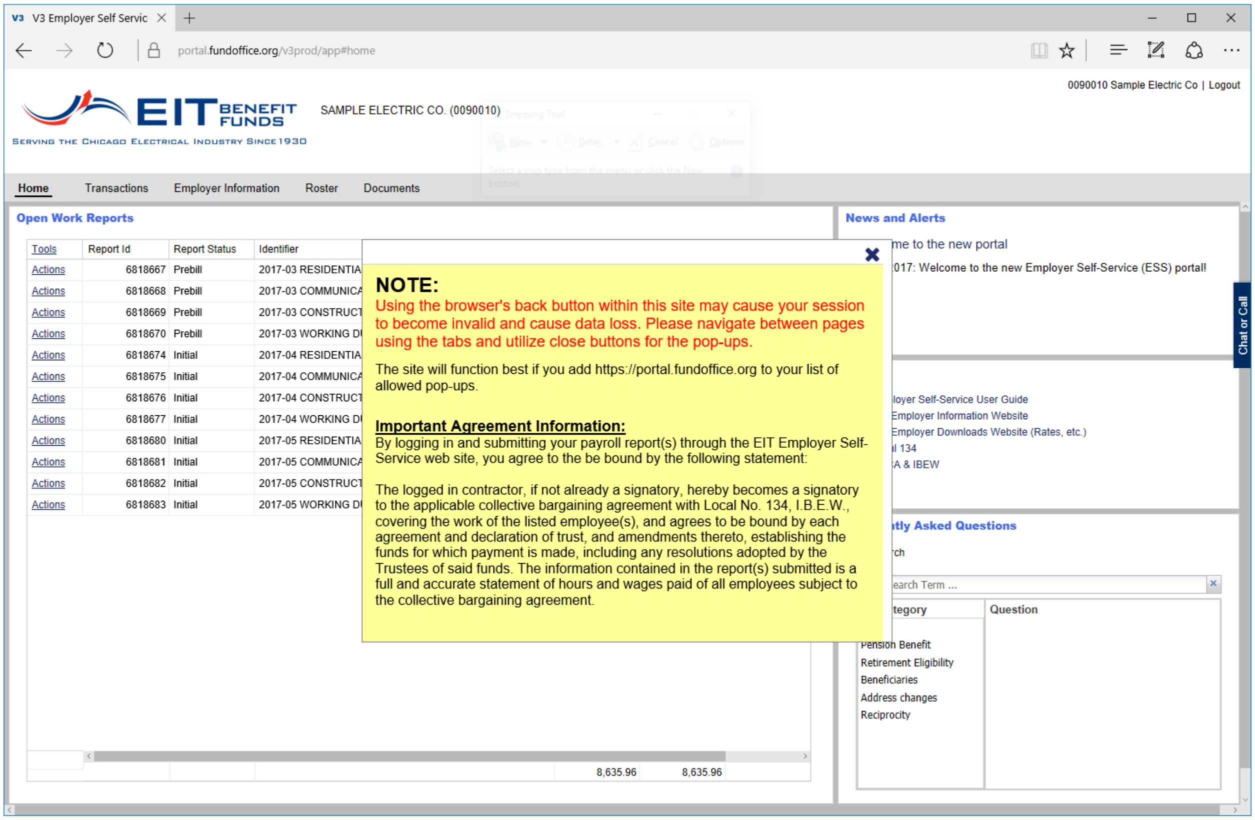
2 FIRST TIME LOG-IN PROCEDURE

Your **Username** is the seven-digit account number that will be provided by EIT when you are setup as an employer in the benefit administration system (usually starts with 000 or 00). If you have not logged in before, your temporary password when your account is first setup will be your FEIN number, including the dash, plus the letters “EIT” (i.e. 34-9984321EIT). You will be prompted to change the password once logged in. Your new password will need to be between 8 and 20 characters long and include at least one letter, one number and one special character such as “-“ or “@”.

The login screen will appear as below. Please keep in mind that there are only five attempts allowed to enter the correct password. Your on-line account will be disabled after the fifth attempt of entering the incorrect password. Please contact EIT to enable your account if this happens.



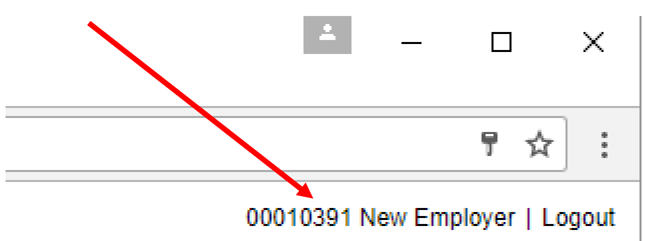
After logging in and going through the password reset procedure the first web page you will see is the **Home** page below. Please contact Dan Sheffield at dsheffield@fundoffice.org or 312-782-5442 x275 if you have trouble logging in for the first time. Please make sure to include your seven digit EIT account number if you are contacting us via e-mail or leaving us a voice message.



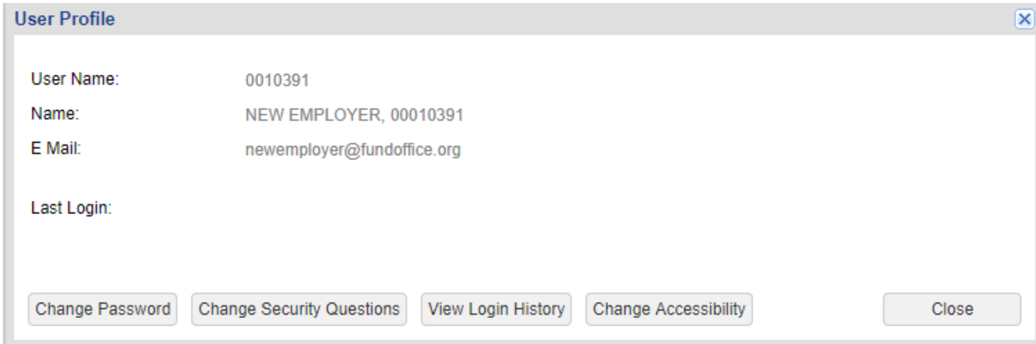
On the **Home** screen, you will be prompted with an important message regarding the use of the browser's back button and a site usage agreement. Once you have read this message, you may close the box by clicking on the "**X**" in the upper right corner.

3 USER PROFILE

Once logged in on the site, you can access your **User Profile** by clicking on your username in the upper right corner of the screen as in the picture below.



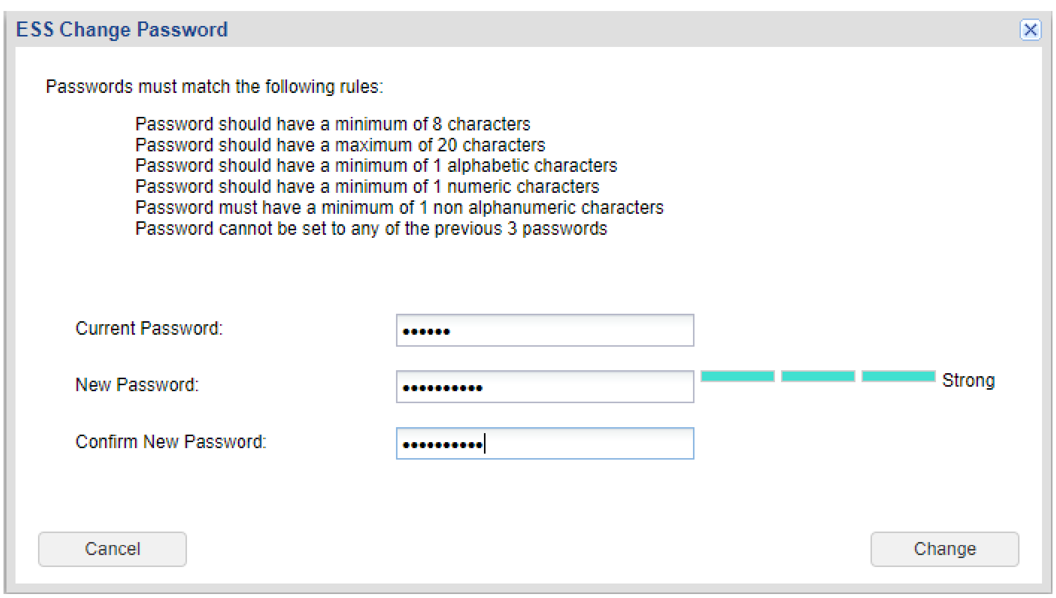
The following **User Profile** window will open. On this screen, you have the ability to Change Password, Change Security Questions, View Login History and Change Accessibility (not currently used).



3.1 CHANGE PASSWORD

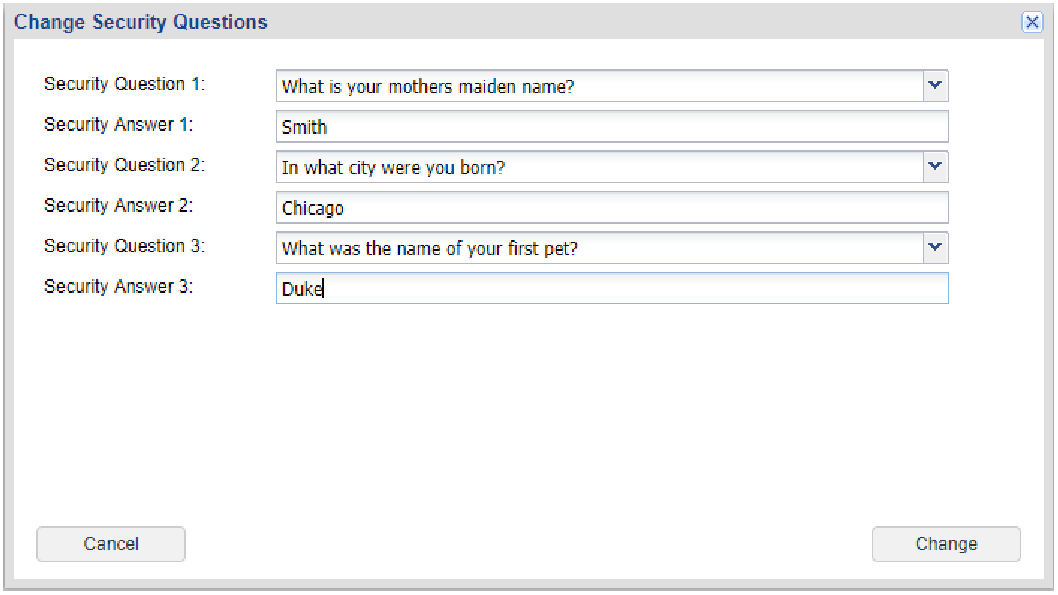
From the **User Profile** screen click on the **Change Password** button to open the **ESS Change Password** window. On this screen you will enter in your **Current Password**, which you used to login, and a **New Password**. When creating a new password, the password must comply with the complexity rules that are listed on the screen. The security rules in the system have changed from what was acceptable in the past and may change in the future so always be sure to read what is on the screen.

As you are entering the new password, the three bars to the right will show the strength of the new password to help you pick a password that is secure. Once you are happy with the strength of the new password, you can enter it in the Confirm New Password box. If you wish to continue with the password change, click on the Change button and confirm or click on the Cancel button.



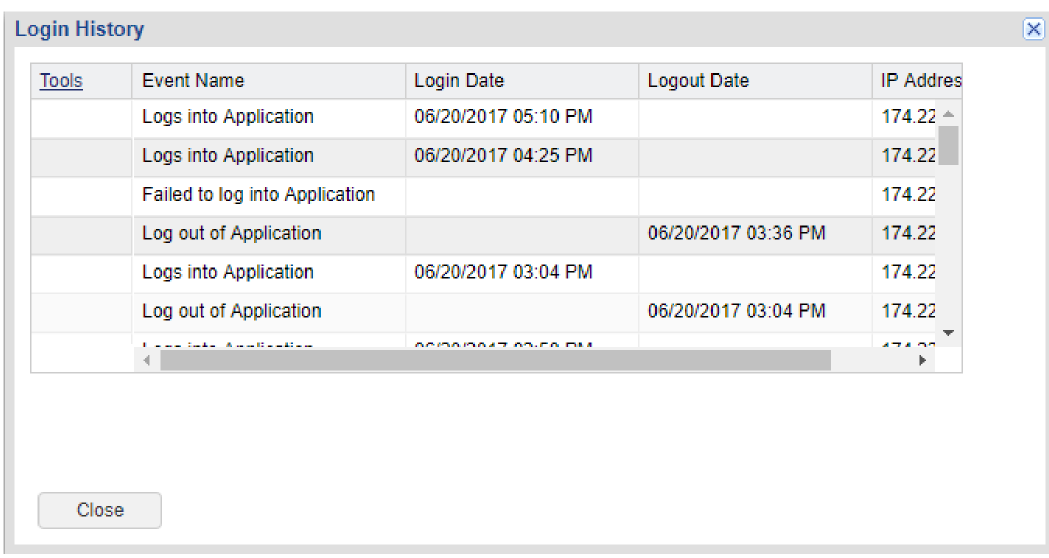
3.2 CHANGE SECURITY QUESTIONS

From the **User Profile** screen click on the **Change Security Questions** button to open the **ESS Change Security Questions** window. On this screen you will be able to select 3 security questions that will be used to verify your identity when utilizing the **Forgot Password** link on the login screen. Once you have selected the Security Questions and entered answers, you may click on the Change button to save or the Cancel button to discard the changes.



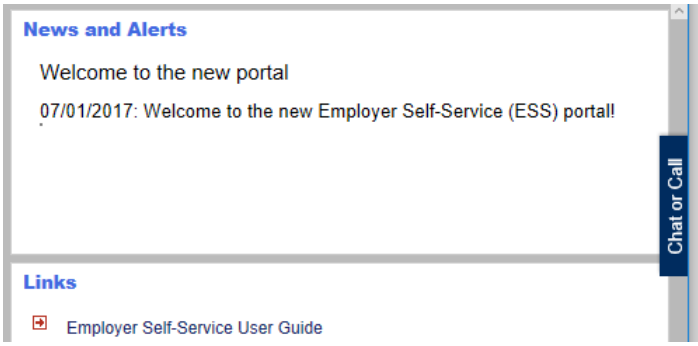
3.3 VIEW LOGIN HISTORY

From the **User Profile** screen click on the **View Login History** button to open the window below which will show the history for logins to your account. Click Close when finished.

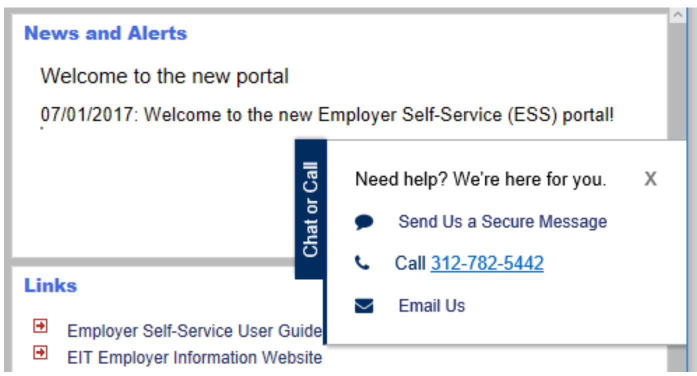


4 CONTACT OPTIONS

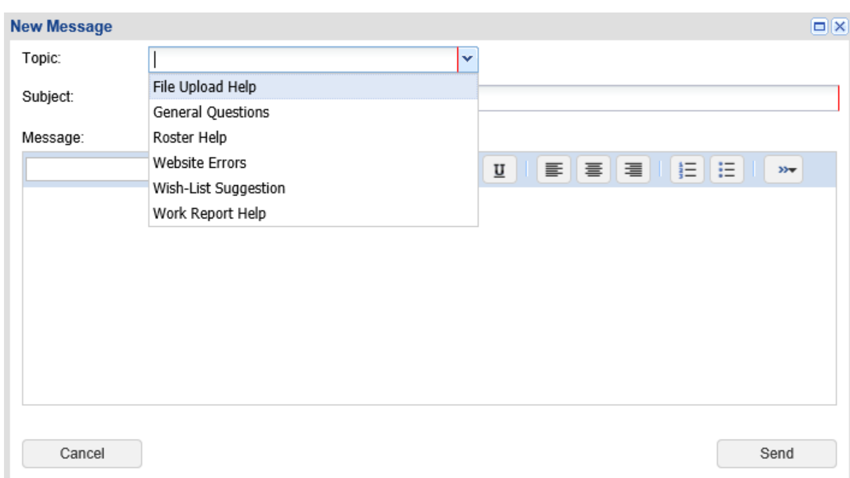
On the right side of the screen, you will see a blue widget titled **Chat or Call**. By clicking on this widget, it will expand to show several methods of contacting EIT.



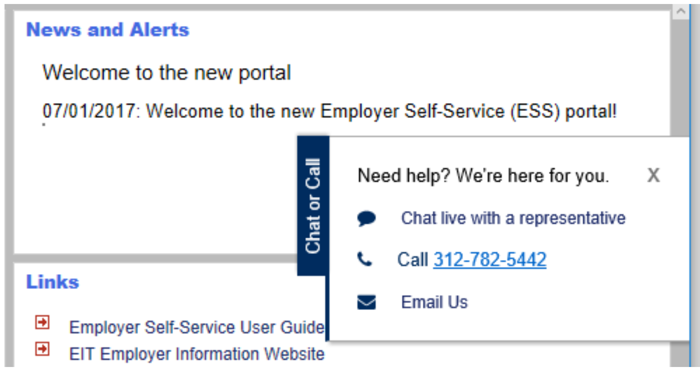
The contact methods include Email, Phone, Secure Message and Chat as shown below.



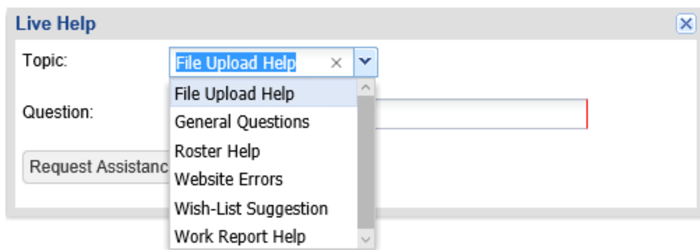
When support staff are not currently available online, you will have the option to **Send Us a Secure Message.** Clicking on this link will open the secure message window where you can select a topic and enter a message. This messaging is contained within the software and can be used to transmit personal information such as social security numbers. Type your message and click **Send**.



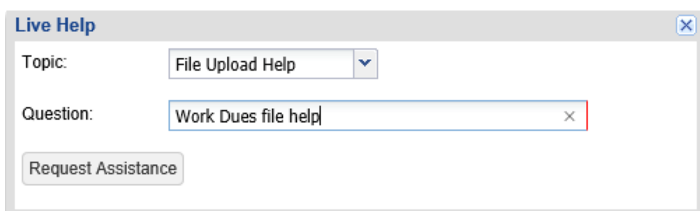
When support staff are available online, the messaging option will change to **Chat live with a representative**. Click on the link to initiate a Chat session with the EIT support staff.



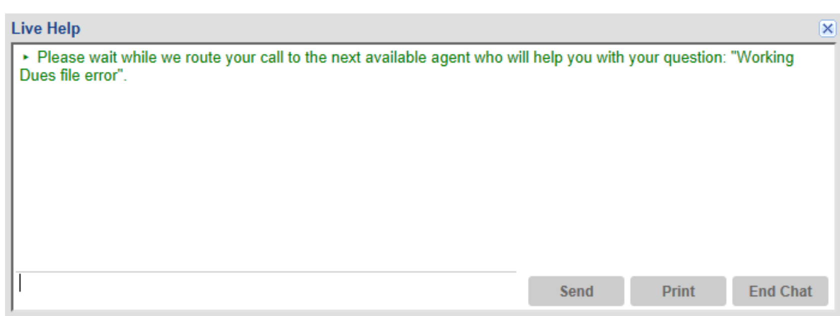
Select a Topic for the help session.



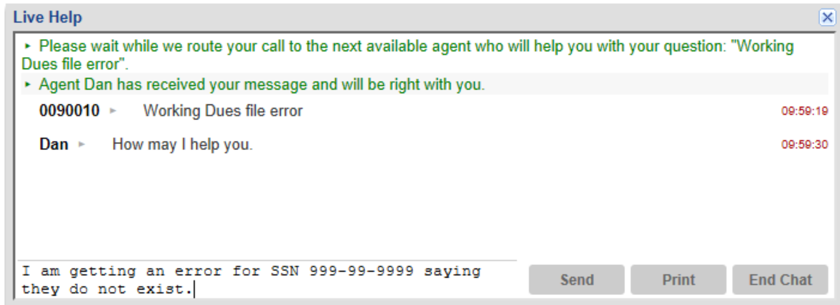
Enter your question.



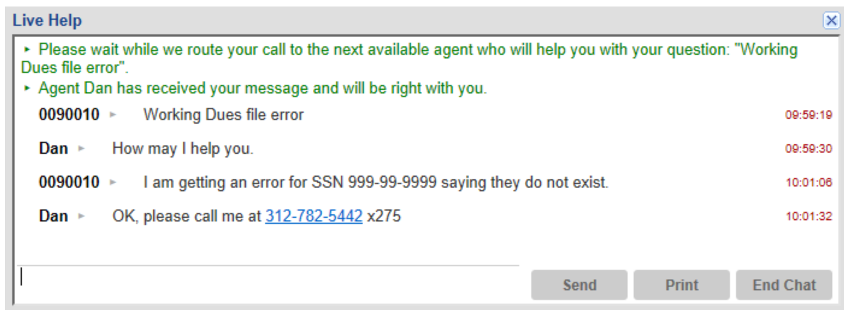
Wait for the next available support representative to accept the Chat session.



To chat with the representative, simply enter your comments in the text box and click the **Send** button. The chat session is secure so you may enter private information such as social security numbers.

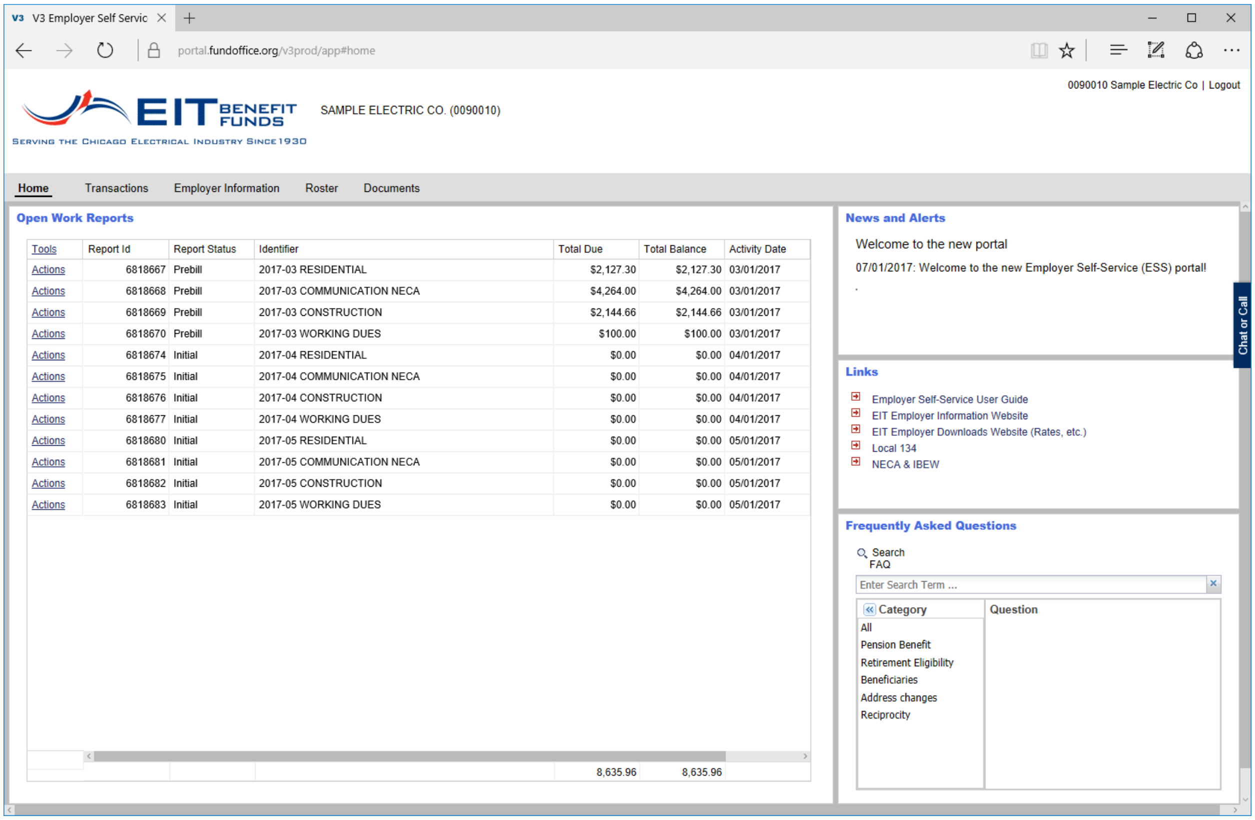


When your chat session is complete, you can **Print** the session or just click on the **End Chat** button



5 HOME TAB

The **Home** tab was designed to provide you the majority of everything you need in one spot. From this tab, you will be able to complete your work reports as well as access help and important news.



5.1 OPEN WORK REPORTS

The section of the **Home** tab labeled **Open Work Reports** has been setup to show you only the work reports which are at either **Initial** or **Prebill** status. These are the work reports which you will need to process for the month.

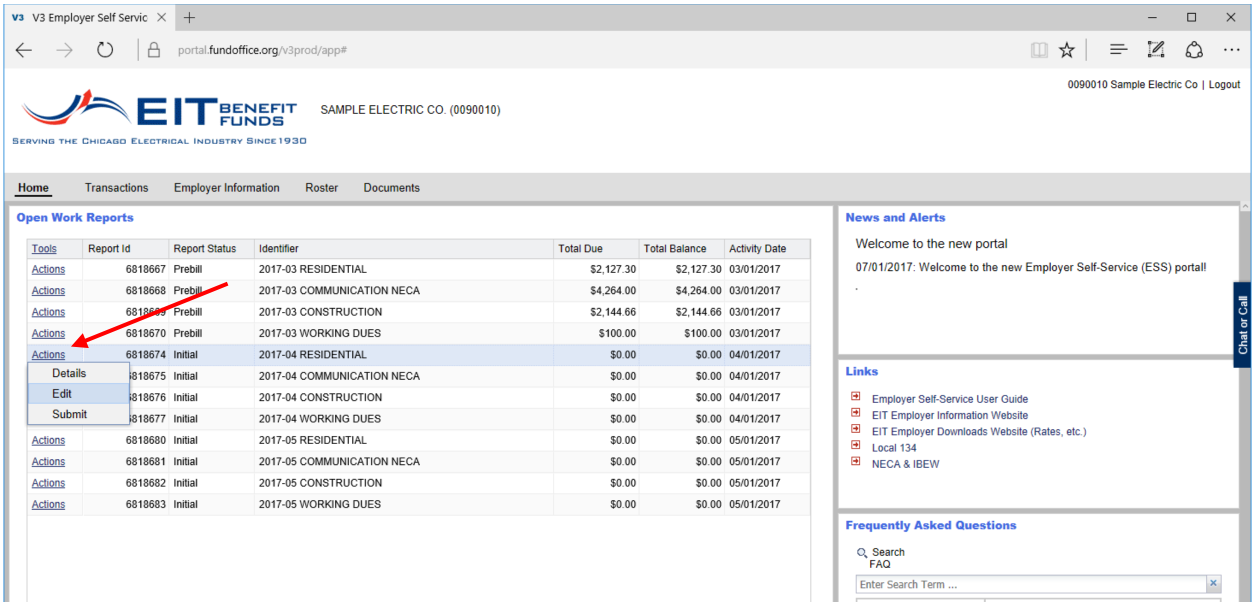
The work reports are generated for all employers on the first day of the month with an activity date for the prior month for regular payroll reports and the next month for PPlan reports. The work reports will be generated either at **Initial** or **Prebill** status based on whether you fill out the reports online or print them out and manually fill in the report to send with your payment.

While at the **Initial** status, the employer may make changes to the report. When a report has advanced to **Prebill**, only staff at EIT may make changes.

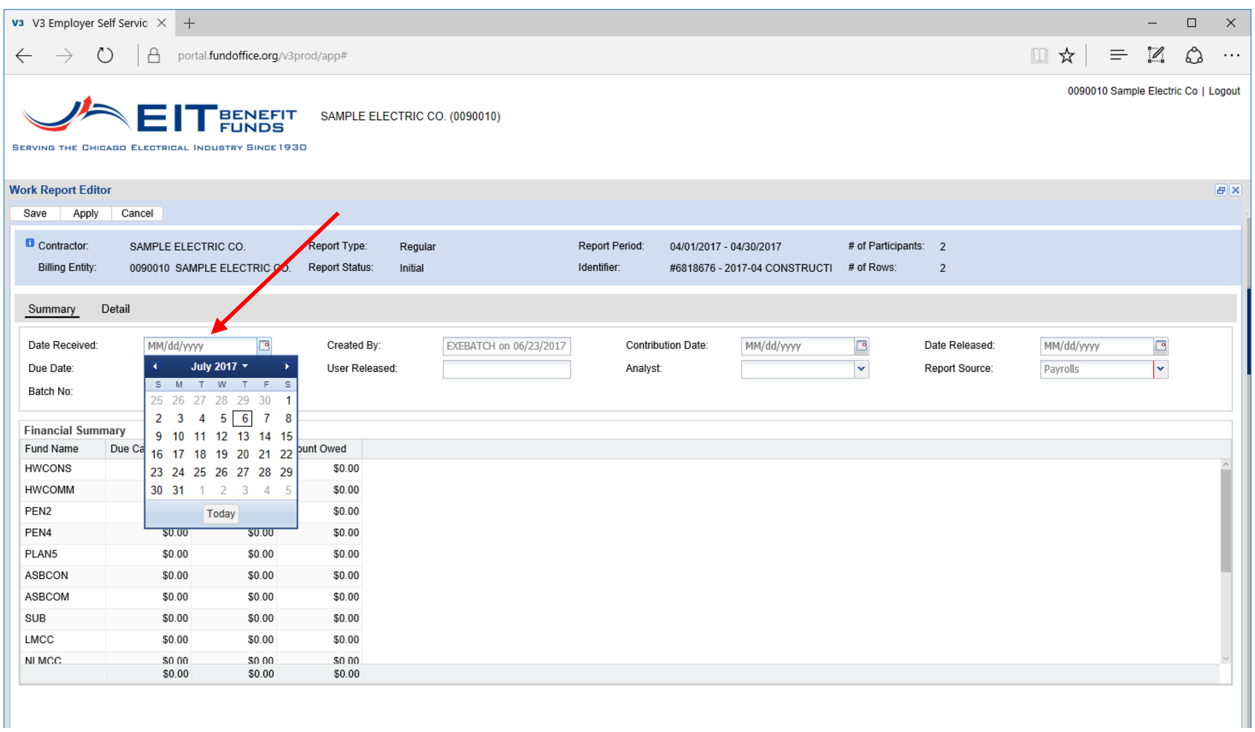
Once a report has been processed by EIT and payment applied, the status will move to **Released** and the report will no longer show up in the **Open Work Reports** screen. At this point, no changes may be made to the report and any updates to hours or wages must be processed by EIT staff through the creation of adjustment reports.

5.1.1 EDITING A WORK REPORT

The employer may modify only work reports that are at the **Report Status** of **Initial**. To edit a specific report, click on the **Actions** menu next to the report you wish to work on and select **Edit** as in the screen below.

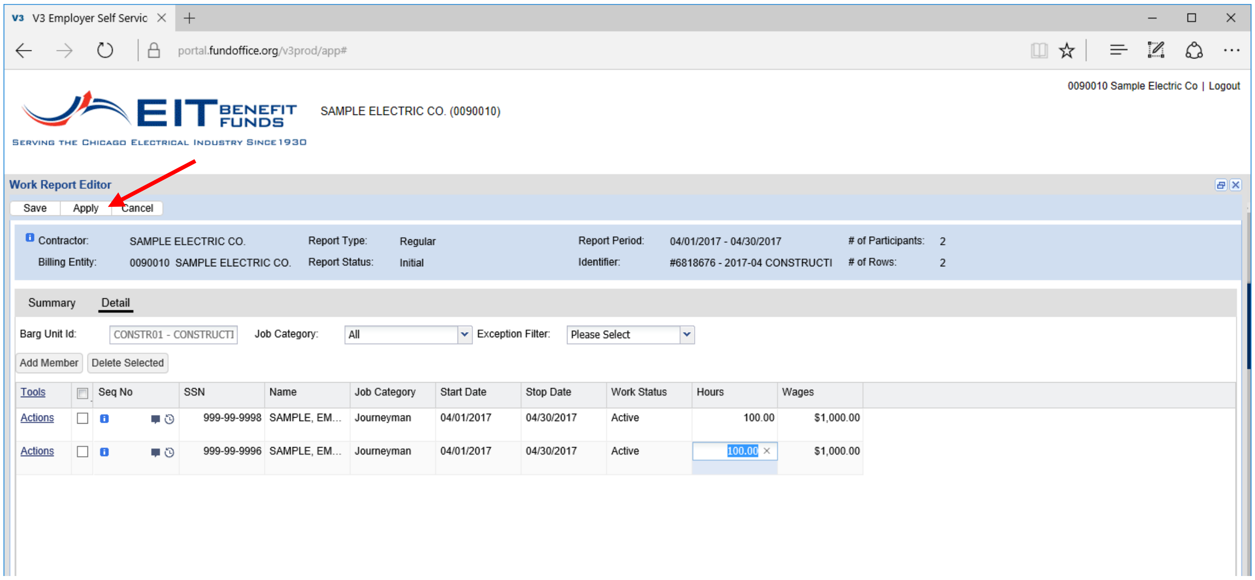


When the report opens for data entry, the first thing you will need to do is enter a **Date Received** either by keying it in or selecting a date using the dropdown calendar. The **Date Received** should be the date that you are completing the report.



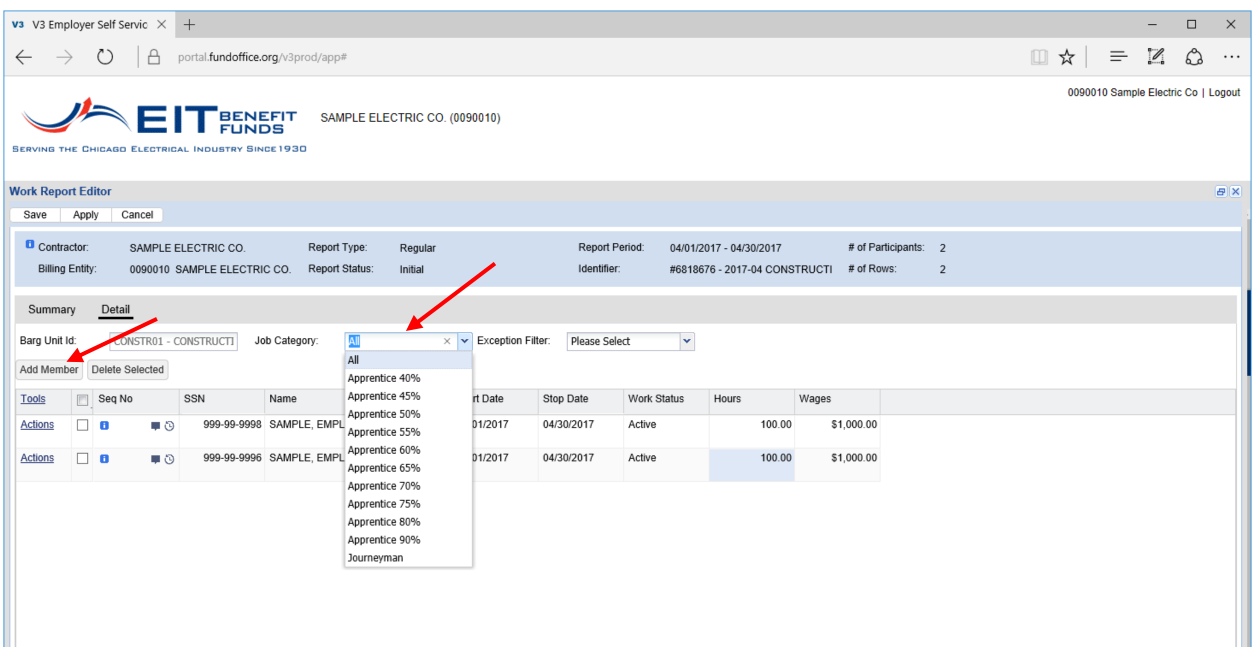
Once the **Date Received** has been entered on the **Summary** tab, you can click on the **Detail** tab to begin the entry of hours and wages for each employee. For employees that are already on the roster, click on the **Hours** field and enter in the number of hours that the employee has worked in the pay period. Next, you will enter in the **Capped** wages for the employee.

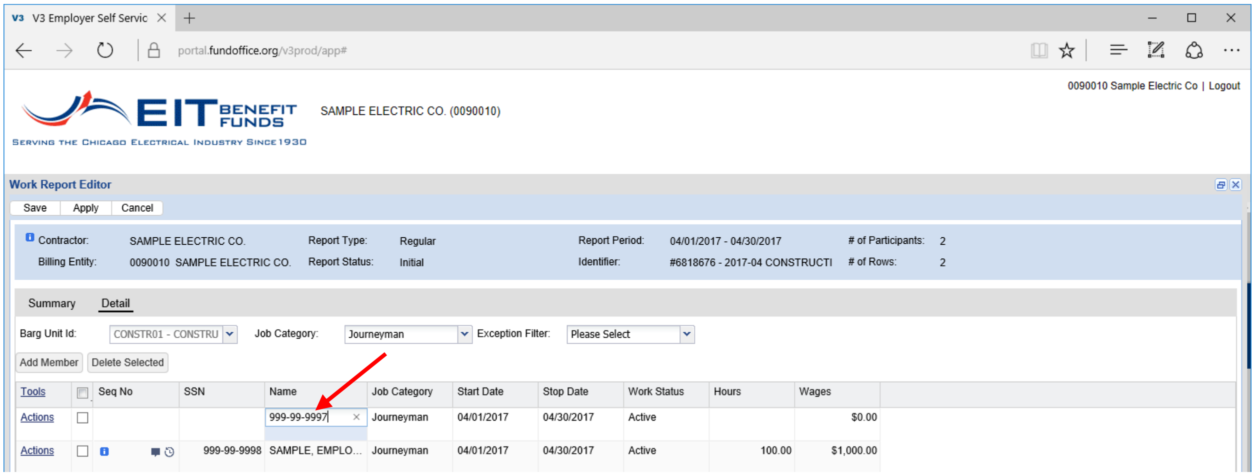
As you are entering data, it is best to click on the **Apply** button as you go along. The **Apply** button will save what you have entered while keeping you in the active report.

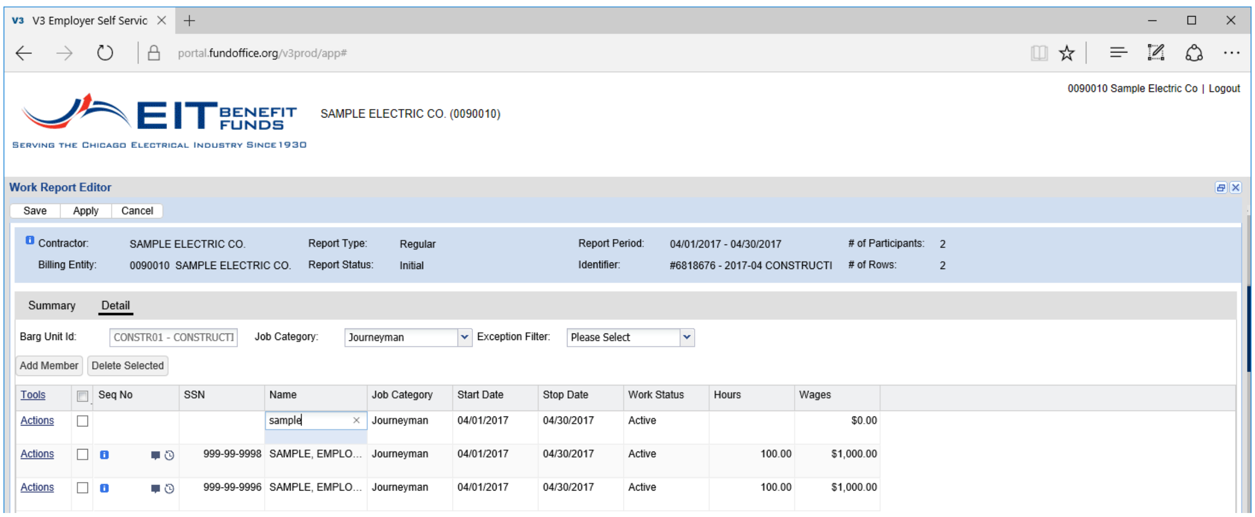


5.1.2 ADDING EMPLOYEES TO A WORK REPORT

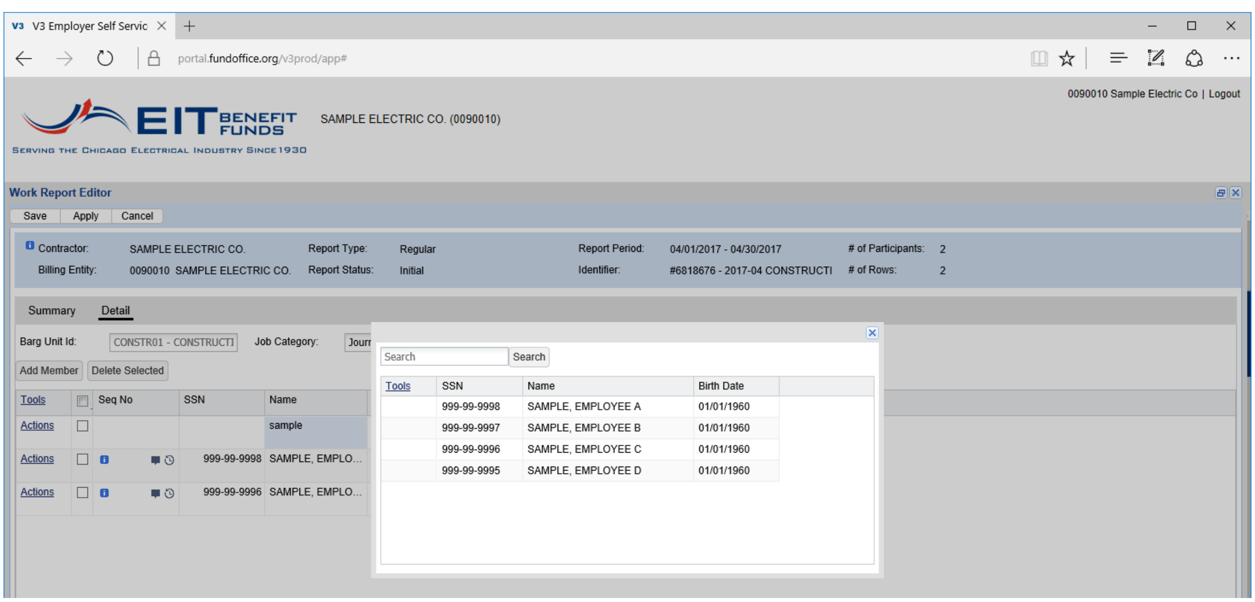
To add an employee to the report, you must first select the **Job Category** of the employee and then click on the **Add Member** button. This will add a new line at the top of the grid. To search for the employee, you can either enter the **SSN** or a **Name** in the **Name** field. It is recommended that you utilize SSN to be sure you are reporting for the correct employee.







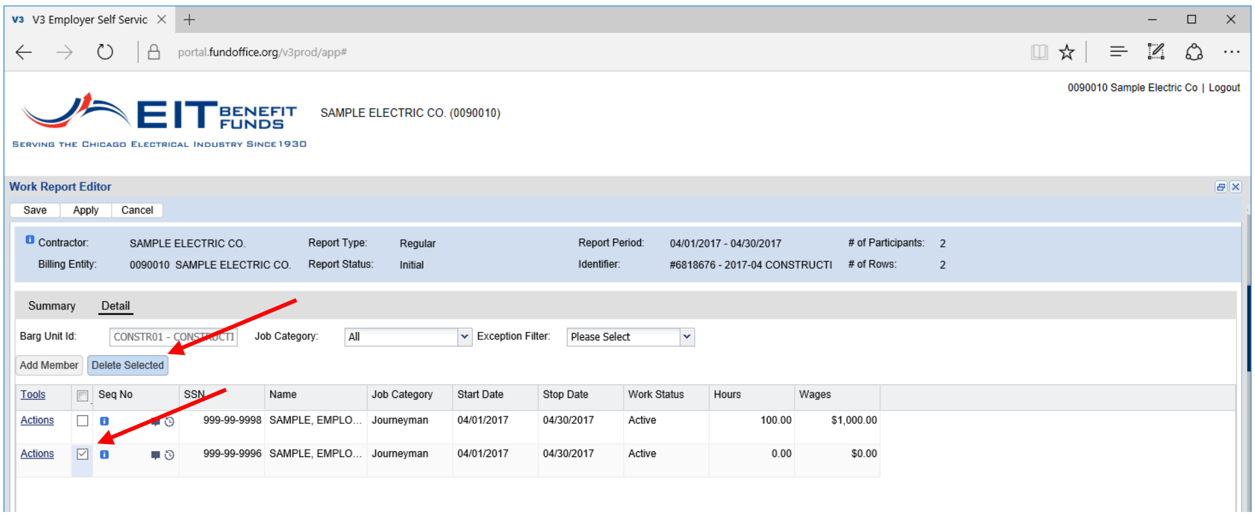
When entering a name, if more than one member is found, a selection box will appear and you can select the employee by clicking on their name.



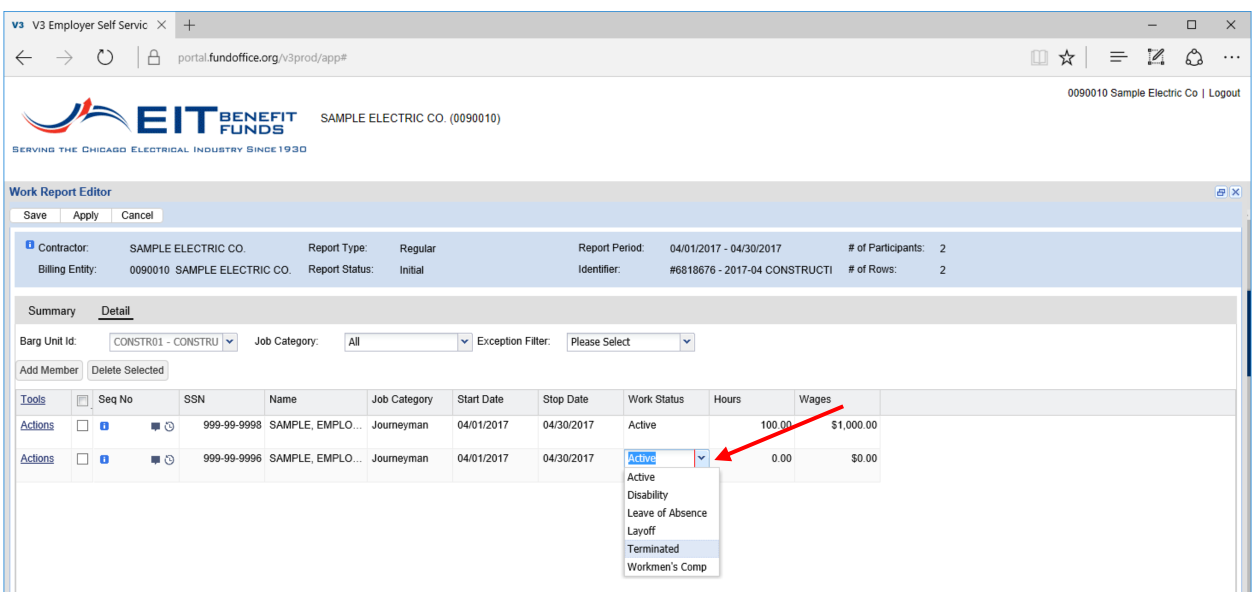
If the employee you are trying to add to the report does not exist, you will need to contact either Sharon (x280) or Meg (x220) in the Contribution Accounting department to add them to the benefit administration system. In the future, you will be able to add these employees yourself through the Roster functionality.

5.1.3 DELETING EMPLOYEES FROM A WORK REPORT

You currently have two options for removing employees from a work report. If you wish to remove the employee from the current month report, but wish to have them remain on the roster, you will click on the **checkbox** next to the Actions link for the employee(s) and then click on the **Delete Selected** button.



Your second option will be to terminate the employee, which will permanently remove them from the roster. To do this, click on the dropdown menu in the **Work Status** box and change the employee from **Active** to **Terminated**. Enter zero for both hours and wages. Once this has been done, the employee will be removed from the next month's reports.

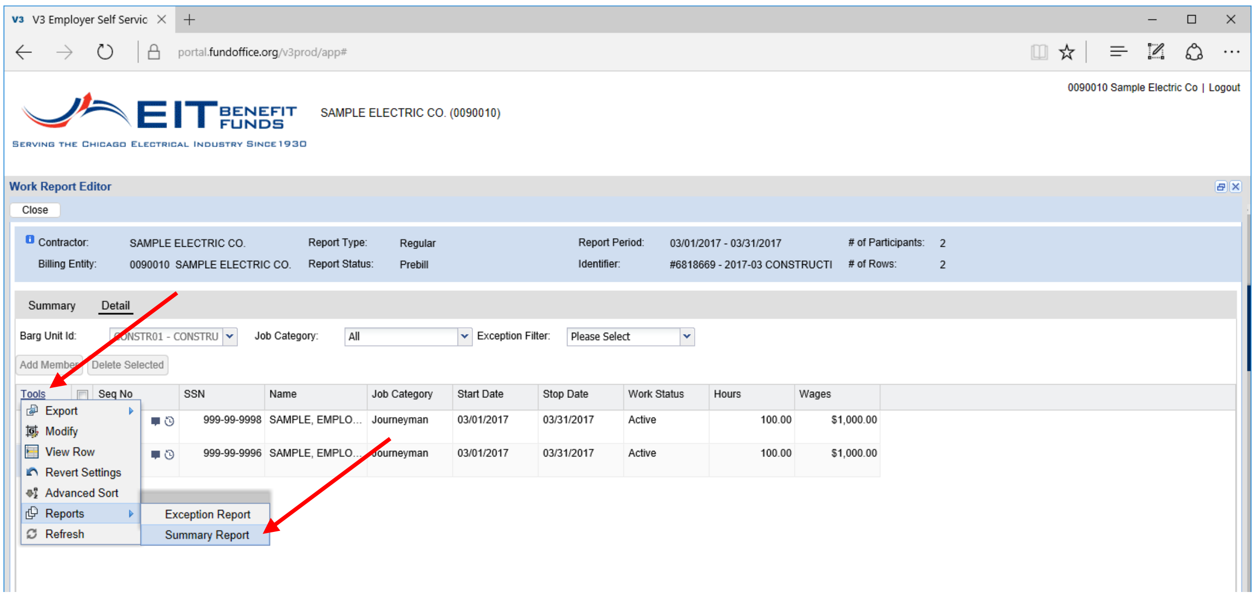


5.1.4 NO MEN (ZERO HOURS) WORK REPORT

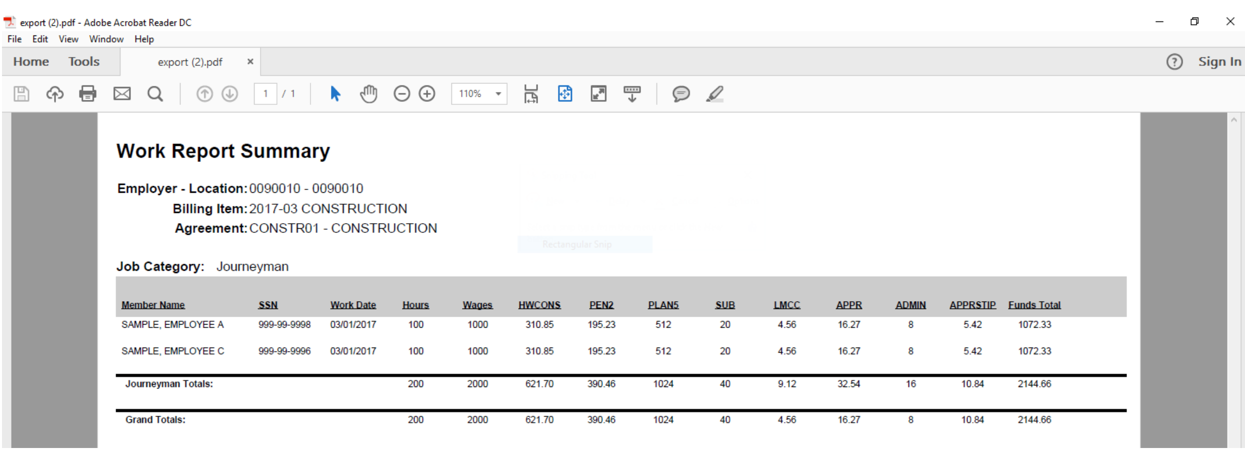
If you have no hours and wages to report for an agreement, you will still need to submit the No Men report. Edit the report as you normally would by entering a **Date Received** on the **Summary** tab and on the **Detail** tab enter zero for hours and wages. Once saved, this report must be submitted along with all of the others.

5.1.5 PRINTING A SUMMARY REPORT

Once all hours and wages have been entered on the report, you are now ready to print the **Summary Report** for review prior to submission. While still on the **Detail** tab of the report, click on the **Tools** link, select **Reports** from the menu and click on **Summary Report**.



Depending on the browser you are using, the next screen will vary but will open a PDF file for the **Work Report Summary**. This PDF can be printed or saved. Once you have reviewed the report to confirm the hours and wages for each job category, you should click on the save button to return to the list of reports.



Work Report Summary

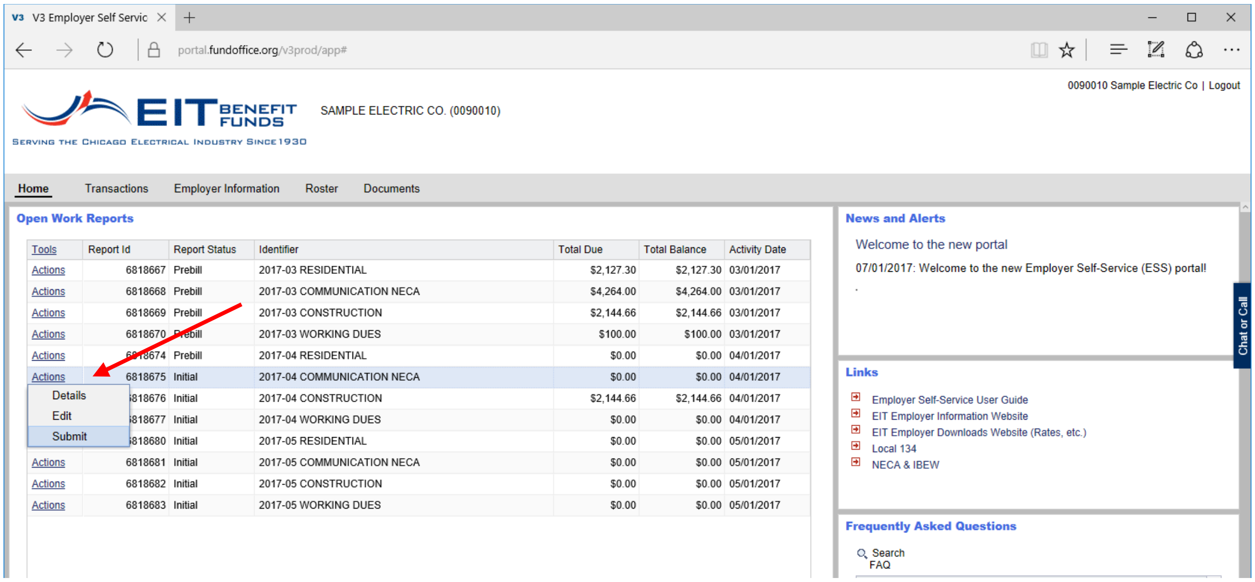
Employer - Location: 0090010 - 0090010
Billing Item: 2017-03 CONSTRUCTION
Agreement: CONSTR01 - CONSTRUCTION

Job Category: Journeyman

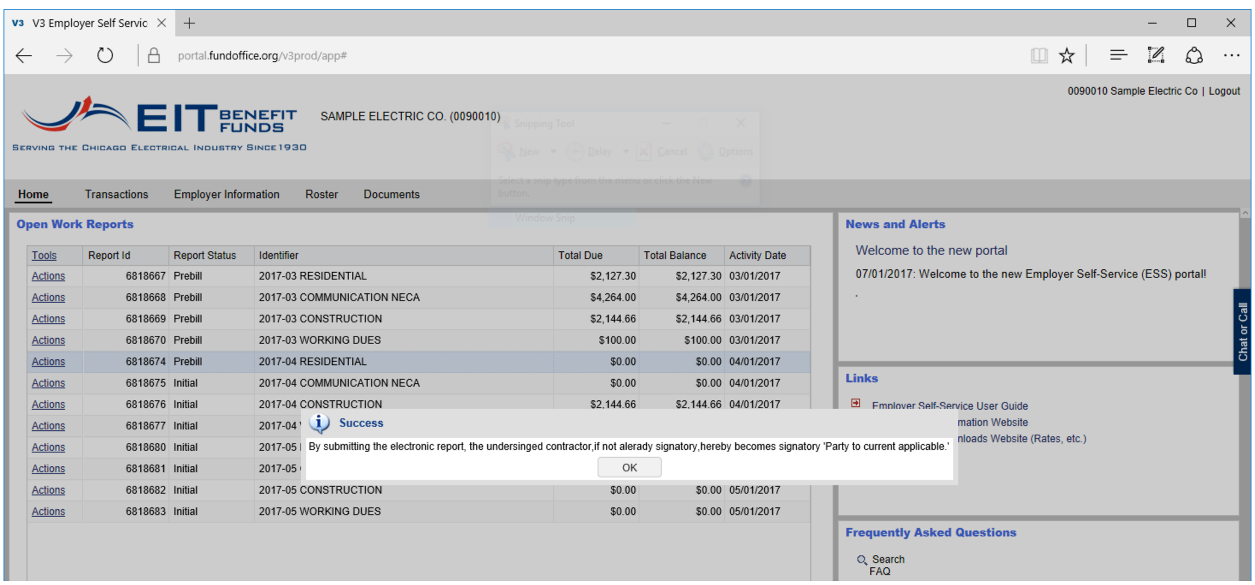
Member Name	SSN	Work Date	Hours	Wages	HWCONS	PEN2	PLANS	SUB	LMCC	APPR	ADMIN	APPRSTIP	Funds Total
SAMPLE, EMPLOYEE A	999-99-9998	03/01/2017	100	1000	310.85	195.23	512	20	4.56	16.27	8	5.42	1072.33
SAMPLE, EMPLOYEE C	999-99-9996	03/01/2017	100	1000	310.85	195.23	512	20	4.56	16.27	8	5.42	1072.33
Journeyman Totals:			200	2000	621.70	390.46	1024	40	9.12	32.54	16	10.84	2144.66
Grand Totals:			200	2000	621.70	390.46	1024	40	4.56	16.27	8	10.84	2144.66

5.1.6 SUBMITTING YOUR WORK REPORTS

Once all of your reports, including the no men, have been reviewed and completed you are now ready to **Submit**. While in the **Open Work Reports** section, click on the **Action** link next to the report you wish to submit. From the dropdown menu, click on **Submit**.

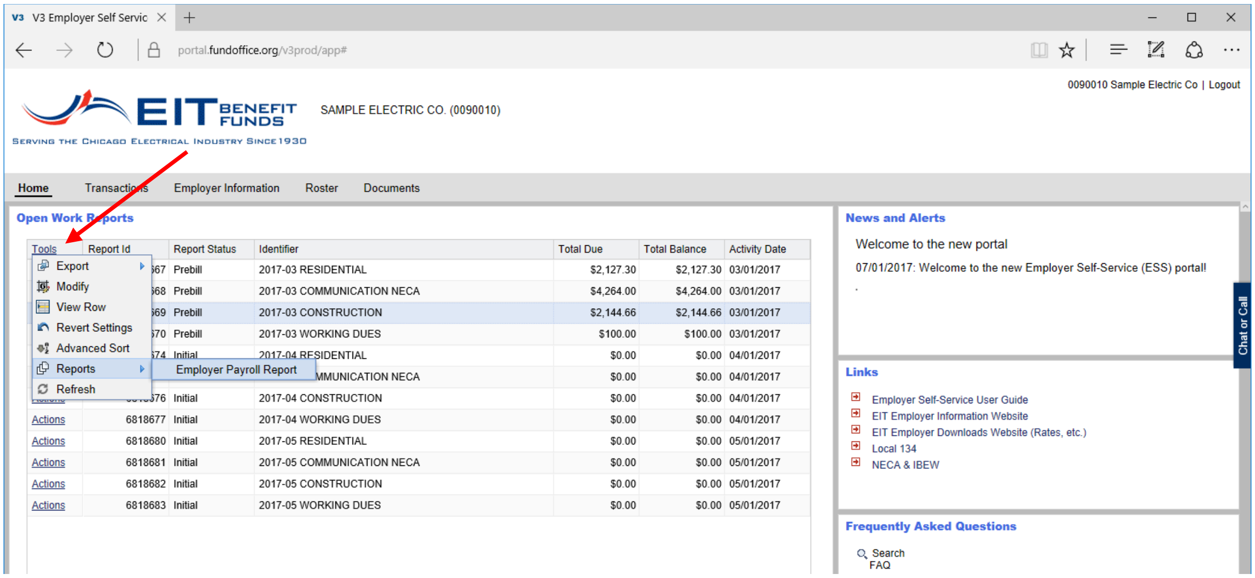


Once submitted, a **Success** message will appear with a note about submission. Click on OK and the **Report Status** will change from **Initial** to **Prebill**.



5.1.7 PRINTING A WORK REPORT FOR MANUAL SUBMISSION

If you have chosen to print out your work reports and complete manually, all of your reports for the month will generate at the **Prebill** status. To print the blank report, click on the report to select and then click on the **Tools** menu. Select the **Reports** option and the **Employer Payroll Report**.



Depending on the browser you are using, the next screen will vary but will open a PDF file for the **Employer Work Report**. This PDF can be printed and saved. Once you have filled out the blank work report you will mail it along with your check to EIT. If you have filled out your work report online and submitted, you will need to send nothing but the check.

5.1.8 SENDING PAYMENT

EIT currently **does not** offer an on-line payment option through our web site. If you wish to setup ACH for your payments, please contact the Accounting Group at EIT. If you are sending payment via check please send to the following addresses based on type of delivery.

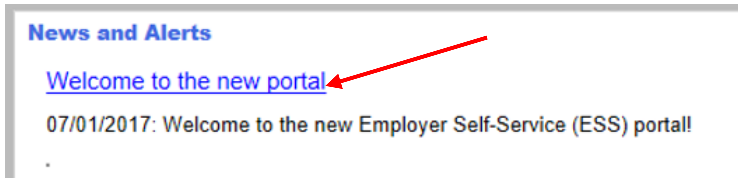
Via First Class Mail:
Electrical Insurance Trustees
75 Remittance Drive - Suite 1615
Chicago, IL 60675 - 1615

Via Courier: (i.e.-Federal Express, UPS, or Messenger)
Electrical Insurance Trustees
Lockbox Number: 91615
5505 N. Cumberland Ave., Ste 307
Chicago, IL 60656-1471

If you have completed your reports online, you do not need to send anything other than the check. If you have filled out your report manually, send the entire report and the check.

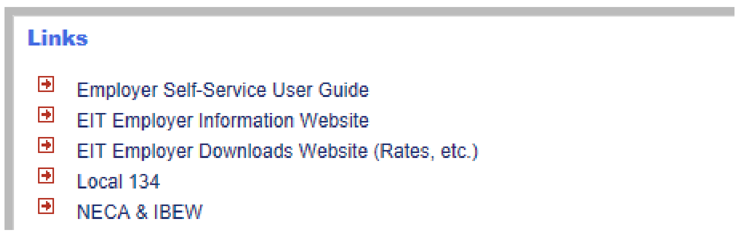
5.2 NEWS AND ALERTS

This section of the **Home** tab will show you important information such as changes to due dates etc. For more detailed information about an item, click on the title.



5.3 LINKS

This section of the Home tab contains useful links to resources on the internet. Additional content will be added to this page as it becomes available.



5.4 FREQUENTLY ASKED QUESTIONS

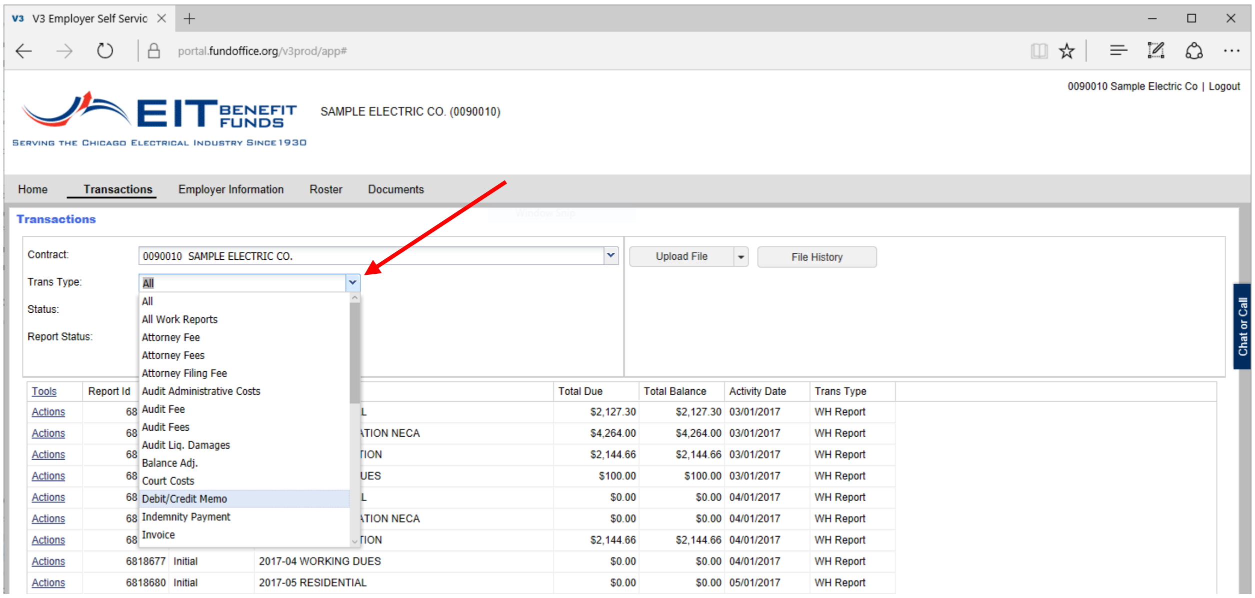
Content for the FAQ section is currently being developed. Please check back soon for these online question/answer documents.

6 TRANSACTIONS TAB

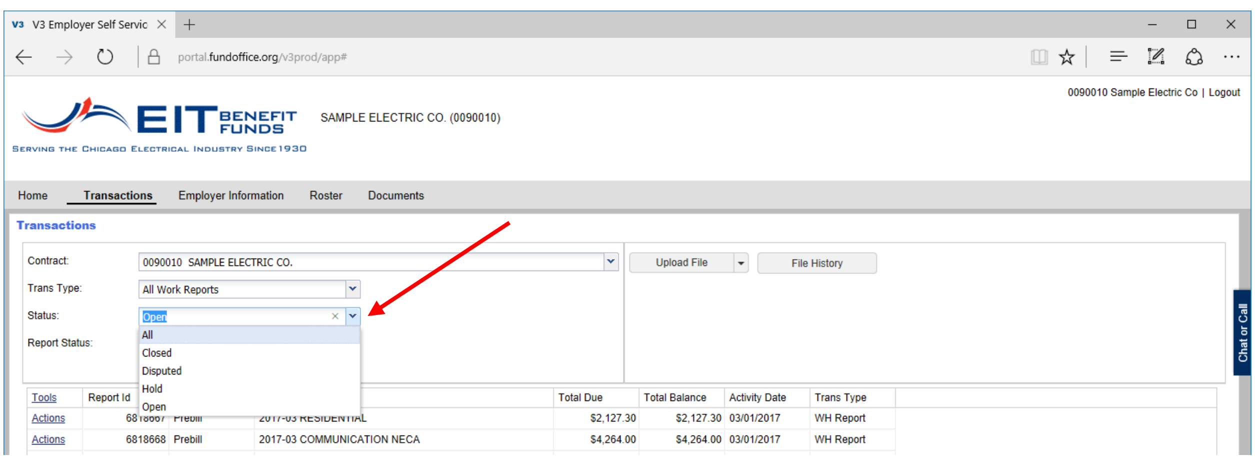
The **Transactions** tab is used to view all transactions associated with your account. This includes work reports, work report adjustments, liquidated damages, debit/credit memos etc.

6.1 TRANSACTIONS

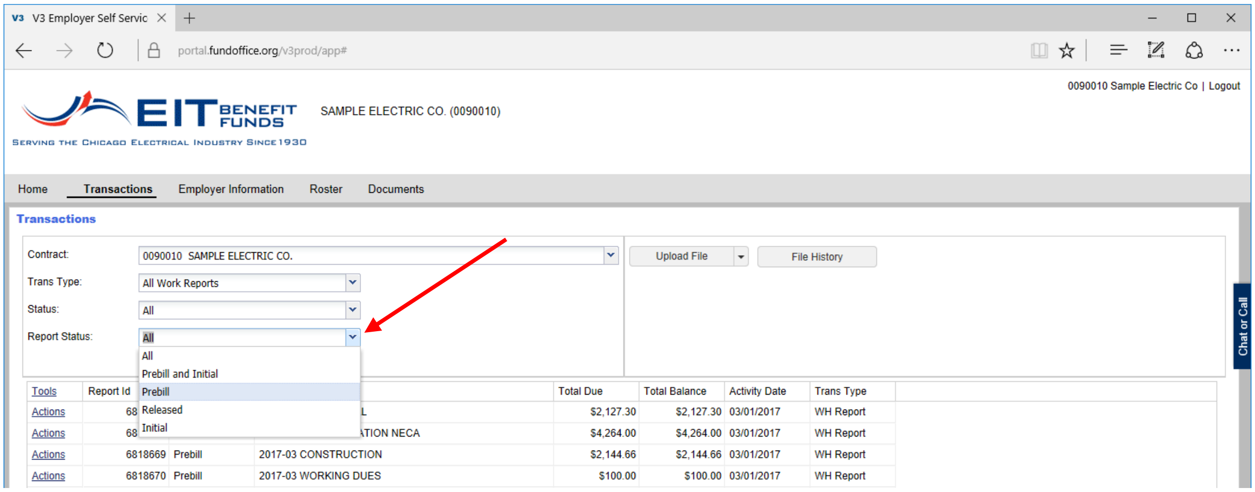
The primary section on this screen is **Transactions**. The top portion of the section allows you to filter the transactions. First, select a **Contract** if you have more than one billing entity setup. Next, you should select the type of transactions that you wish to view from the **Trans Type** dropdown menu.



Your next selection will be the transaction **Status**.



The final selection **Report Status** only applies to the work report transaction types. Select from the dropdown menu. After each selection, the list of transactions will automatically filter based on the selected items.



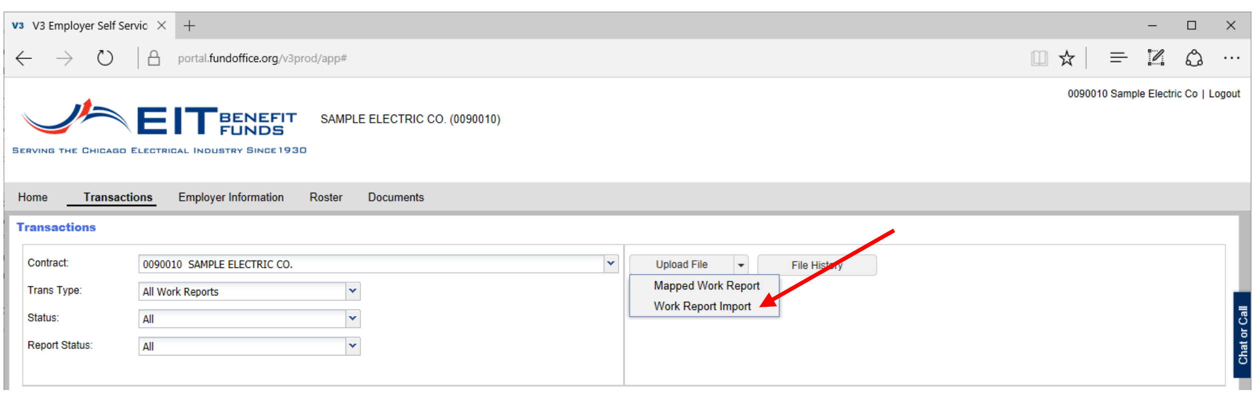
Once you have filtered to find the transactions that you want, you can click on the **Actions** link next to an item. The action choices vary by transaction type. You may edit work reports from this screen using the same method as was described in **Open Work Reports** section of this document.

6.2 UPLOAD FILE

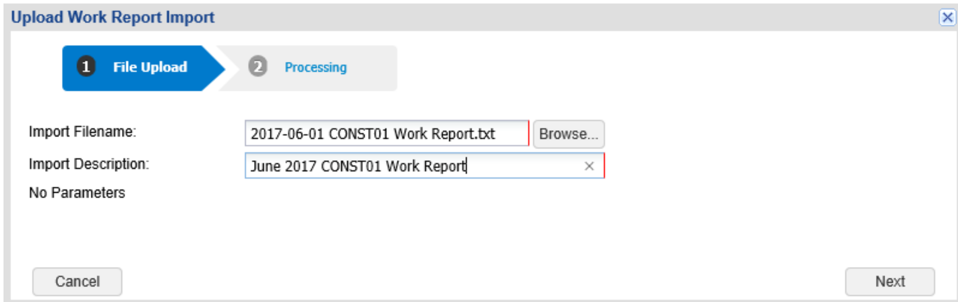
To the left of the transaction filtering dropdown menus, you will see a dropdown menu button labeled **Upload File**. Click on this button select **Mapped Work Report** or **Work Report Import**. The two types of report imports are described below.

6.2.1 WORK REPORT IMPORT (LEGACY NO LONGER USED)

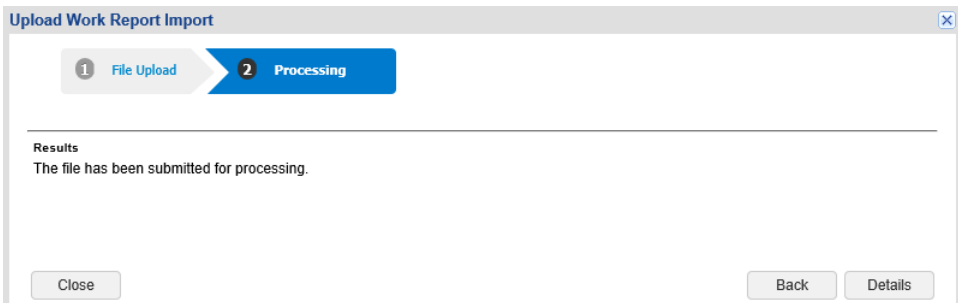
The standard work report import format has not changed from the current specification which is documented in Appendix 10.1. To upload the standard format report, click on the **Upload File** menu and select **Work Report Import**.



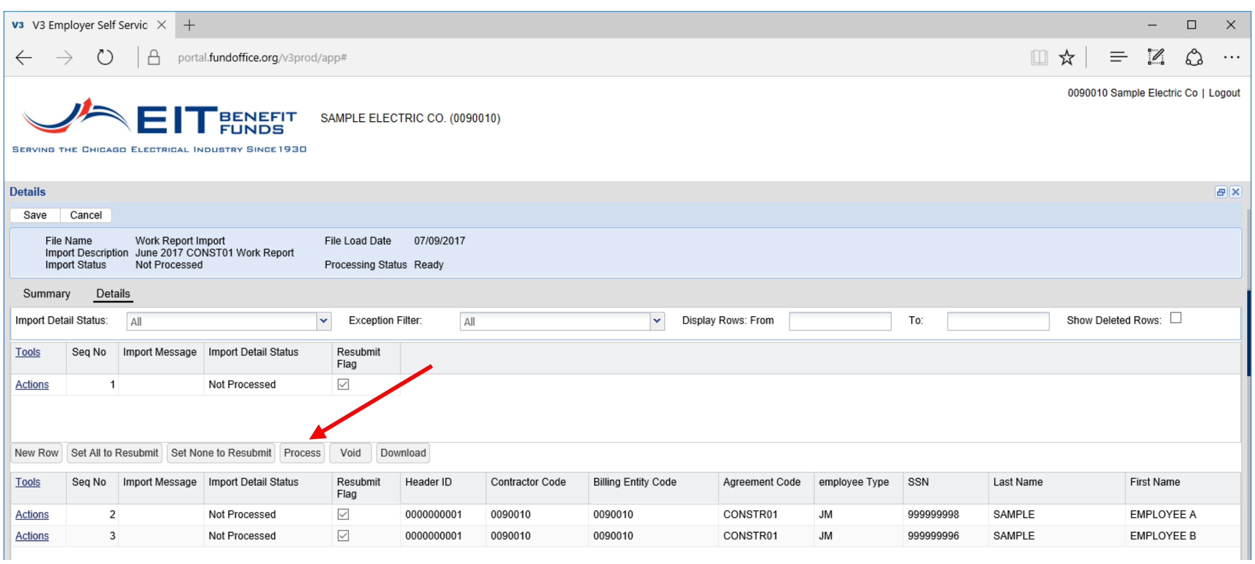
The **Upload Work Report Wizard** will open and allow you select the file to upload as well as give it a description. Click the **Browse** button to find the text file that has been created using the standard specifications in Appendix 10.1. Enter the **Import Description** and click the next button to proceed.



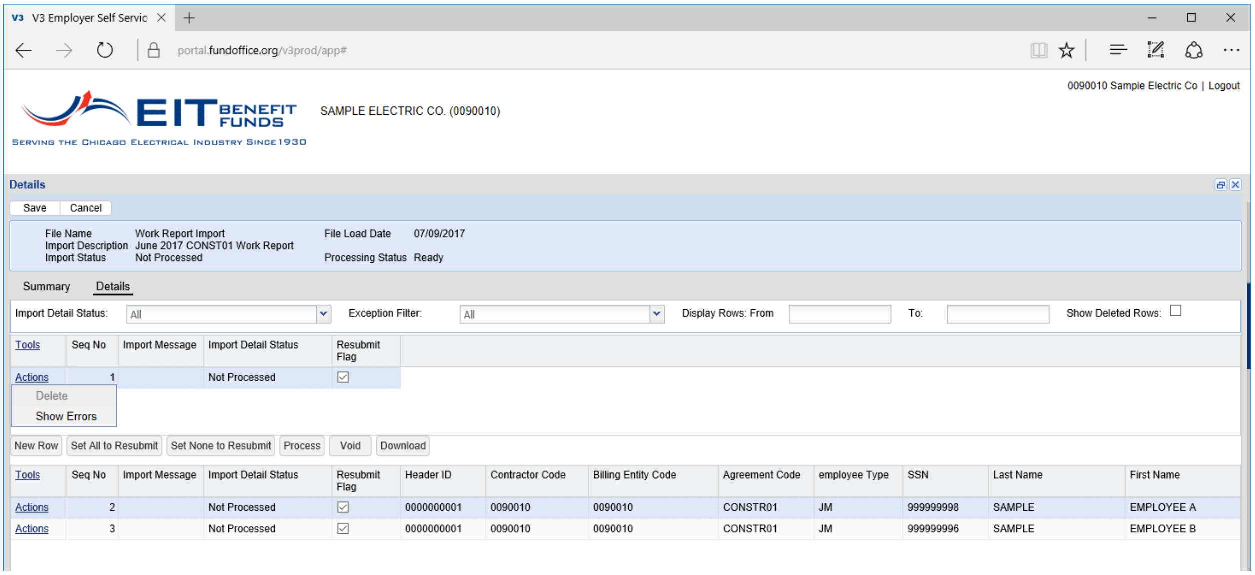
The **Processing** screen will open and confirm that the file has been submitted for processing. From this screen click on the **Details** button.



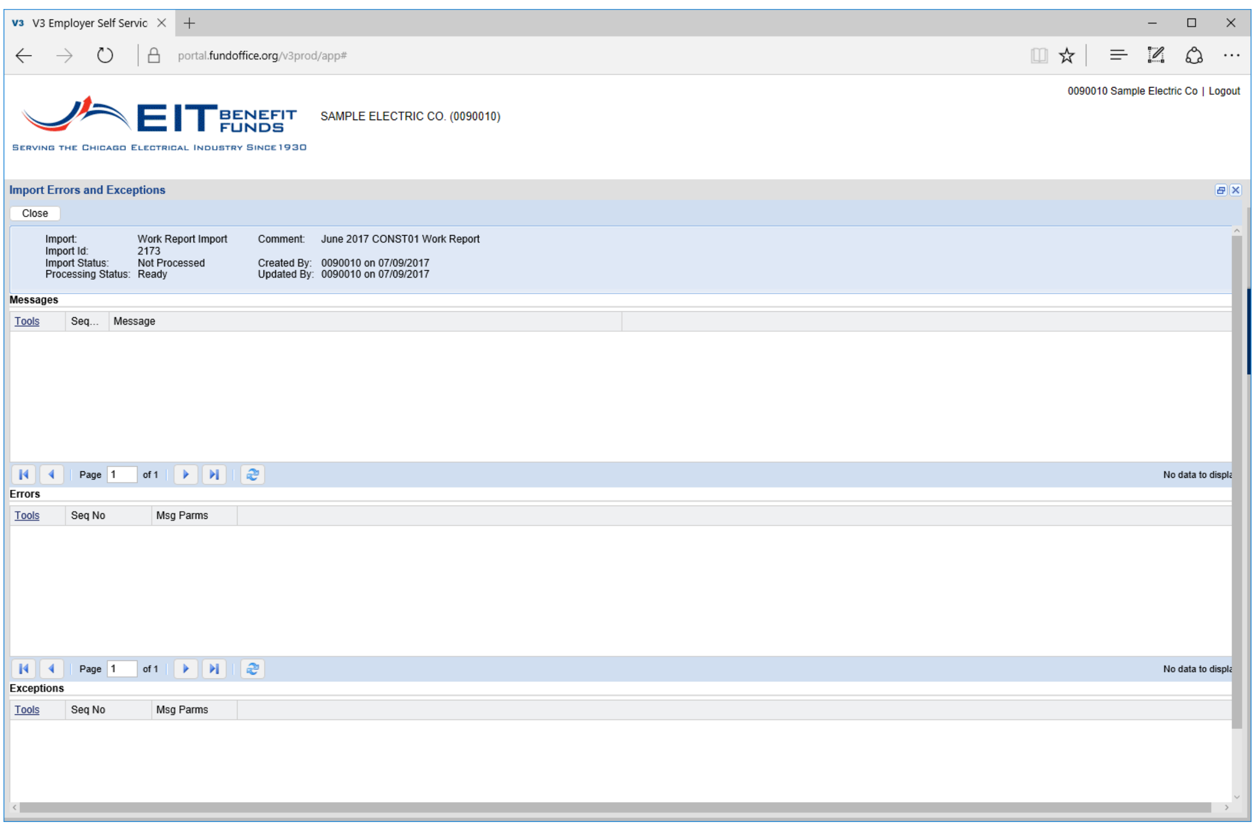
The **Details** screen will show all information for the report file that you have uploaded. Please review the information carefully before proceeding. You may edit the information on a line by clicking in the field you wish to change and updating the value. You may also Delete a line by clicking the Action link on the line and selecting Delete. Once the file is satisfactory, you will click on the **Process** button.



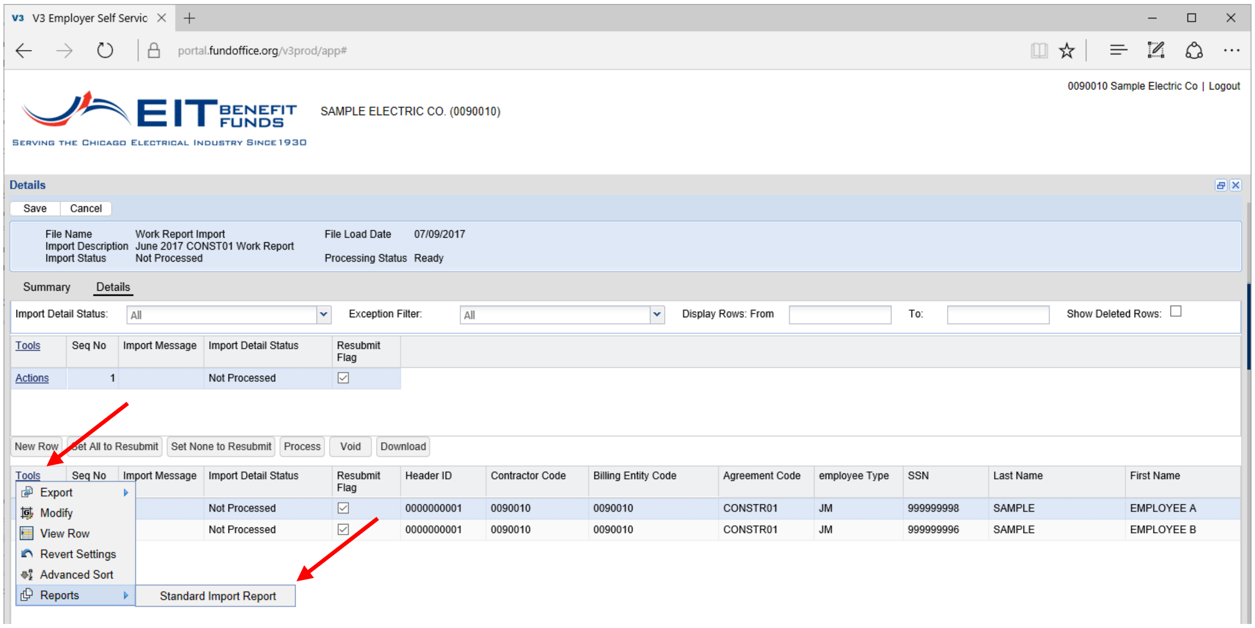
After the report has processed, you will be able to see any errors that have occurred. If the header or a detail line has produced an error, it will show in the **Import Detail Status** column. If a line has errored, click on the **Actions** link and select **Show Errors** to be taken to the **Import Errors and Exceptions** screen.



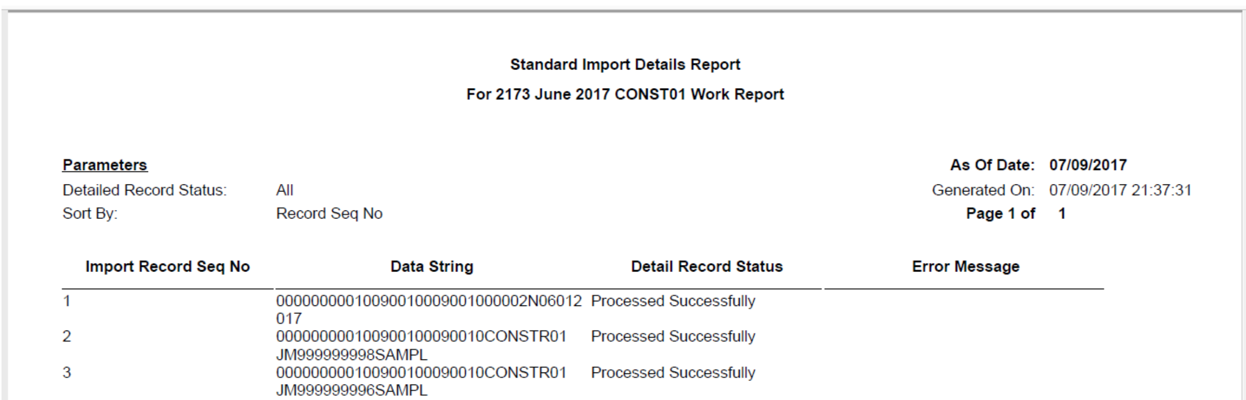
If errors or exceptions have occurred during the processing of the report, they will show in the screen below.



You may also create a formatted import report by clicking on the **Tools** link and selecting **Standard Import Report** as below.



The report will open as a PDF file and will show the detail as below.



Standard Import Details Report

For 2173 June 2017 CONST01 Work Report

Parameters

Detailed Record Status: All

Sort By: Record Seq No

As Of Date: 07/09/2017

Generated On: 07/09/2017 21:37:31

Page 1 of 1

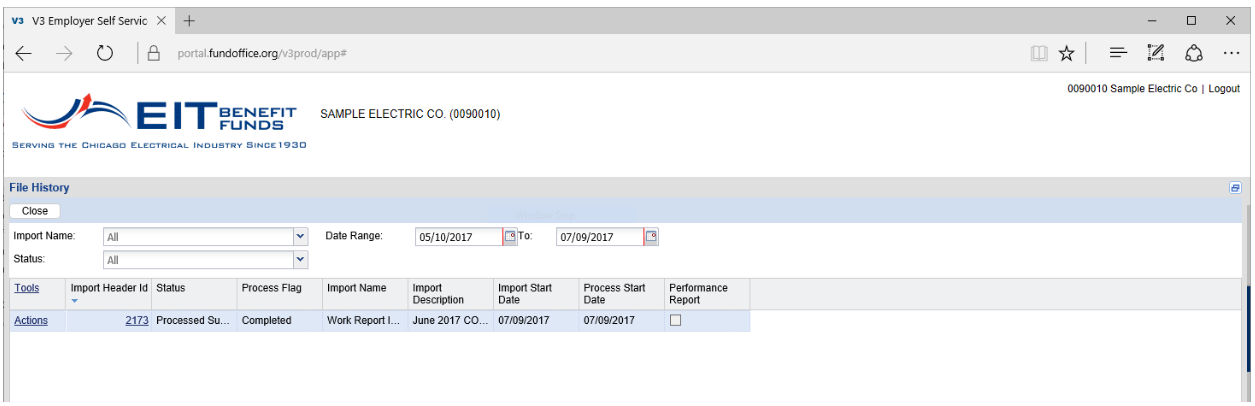
Import Record Seq No	Data String	Detail Record Status	Error Message
1	0000000001009001000900100002N06012 017	Processed Successfully	
2	0000000001009001000090010CONSTR01 JM999999998SAMPL	Processed Successfully	
3	0000000001009001000090010CONSTR01 JM999999996SAMPL	Processed Successfully	

6.2.2 MAPPED WORK REPORT

Instructions/Functionality for the Mapped Work Report import are currently being developed. Please check back soon.

6.3 FILE HISTORY

Clicking on the **File History** button will open a screen where you are able to review files which have been uploaded. If you chose to not process a given file, it will show on this screen and can be voided by clicking on the **Action** link and selecting **Void**.



7 EMPLOYER INFORMATION TAB

Documentation To Be Completed Soon

7.1 BILLING ENTITY INFORMATION

TBD

7.2 EMPLOYER INFORMATION

TBD

7.3 EMPLOYER CONTACTS

TBD

8 ROSTER TAB

The Roster functionality is currently being developed by our vendor and will be added to the site once complete. Please check back soon for this enhancement.

9 DOCUMENTS TAB

Documentation To Be Completed Soon

9.1 FOLDERS

TBD

9.2 DOCUMENTS

TBD

10 APPENDICES