

EMPLOYER CONTRIBUTION REPORTING

# Remit Express User Guide Manpower Reporting Portal



# IBEW Local 150



# Introduction

The Remit Express system allows employers to submit contribution reports and make payments online.

# Access Remit Express at the link below

# uhgrex.azurewebsites.net/Join.aspx

If you need additional help or support contact:

email: UMR\_FundAdminPortal\_Support@umr.com Phone: 1-888-999-7741 Monday-Friday, 8:00AM-5:00PM, EST

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# 1.0 Employer Creates User Accounts

Employers will receive a registration email from the benefit office. This email will include the URL for Remit Express, as well as account creation codes specific to that employer.

Employers can create user accounts through the Remit Express website after receiving user account creation codes from the benefit office. There are three different types of logins, each with a different level of privilege:

- Accounts created with the EmployerView account code:
  - Access to Employer Reports page
- Accounts created with the EmployerContribute account code:
  - o All permissions granted to EmployerView access
  - Ability to upload contributions
  - o Ability to enter contributions
- Accounts created with the EmployerAdmin account code:
  - o All permissions granted to EmployerContribute access
  - Ability to enter/update ACH information

#### The new user screen can be accessed through the "Join" link in the Remit Express toolbar.

User Name:	Acme User name cannot	be blank. ×	
Password: Confirm Password:	AcmeMike		
Authentication Text Number	r		
E-mail: Confirm E-mail:			
Creation Code:			
Verification Code:	4717062		

Only one account can be setup for each account type for an employer. All fields are required. Passwords must be at least 7 characters long.

Enter the Authentication Text Number (This will be your cell phone number for our Multifactor Authentication) After you have set up your profile you will have to log into Remit Express with the credentials you created. You will receive the below message. Make sure the text me verification code is selected. Hit continue to receive a text with your verification code. *This code may take a few minutes to arrive* 

How would you like to sign in? Text me a verification code ((\*\*\*) \*\*\*\_\*\*92)

By selecting "Continue", you agree to receive a one-time automated message at the phone number or email selected for the purpose of receiving a verification code.



# 2.0 Employer Login

Employers log into the system with the "Log In" button in the toolbar.

In

HOME LOG IN JOIN

Users can choose to have the system remember their login information the next time they visit their site. If this box is checked, login information will be stored for 30 days.

Please Login:	
User Name:	
Password:	
Remember me next time.	
	Log

#### 2.1.1 Forgot Password

If the user enters an incorrect User Name/password combination, a Forgot Password link will be displayed on the login page. The user will be asked their security question, selected when the account was created. The password is sent to the email address associated with the user account. If the user does not have a security question selected, the user will need to notify the benefit office that their password needs to be reset.

Please Logi	n:
User Name:	MikesTest
Password:	•••••
Rememb	er me next time.
Login fai	led. Please check your user name and password and try again.
Forgot your	Log In password? lowing information to retrieve your login information via email:
User Name:	
Security Que	stion: What is the name of your favorite pet?
Security Answ	ver:
	Cubmit

# 3.0 Employer Enters/Updates ACH information

Users with EmployerAdmin access can update ACH information through the "ACH Account" link on the toolbar if ACH permission has been granted by the benefit office.

	HOME	ADMINISTRATION	COLLECTION & ELIGIBILITY	REPORTS	CONTACT US	LOG OUT
		ACH SETUP				
Ban	k and bank a	account informatio	n are entered in the follo	wing		
grid	:					
	ACH Accou	nt:				
	Account Set	up		·····		
	Bank Na	me:				
	Bank Addr	ess:				
	(	City:	State: Zip:			
	Accour	nt #:	Transit #:			
	Account Typ	e #: 💙				
		Update Acco	unt Delete Account			

Each time ACH information is updated, the benefit office will be notified and will have to mark the employer as approved for ACH before processing any contribution reports can be processed for that employer.

# 4.0 Employer Enters Contribution Reports

Employers can enter contribution reports manually by populating a table or by uploading a file.

#### 4.1 Manual Contribution reports

To enter contribution reports:

- 1. Log into Remit Express with an "EmployerContribute" or "EmployerAdmin" user account
- 2. Select "Enter Contributions" from the toolbar

HOME ADMINISTRATION	COLLECTION & ELIGIBILITY	REPORTS	CONTACT US	LOG OUT
	ENTER CONTRIBUTIONS			

The user will be prompted to select the Work Period and profile to use. Select the correct Work Period from the dropdown list. Most employers only have 1 profile. Only the earliest time period for each profile will be available to choose from. The profiles will initially be setup by the benefit office.

elect a Contract:						
Contract +	Work Period 🗘	Local Union 🗘	Rates	Documents		
00055	02/2022		ADMINISTRATIVE PERSONNEL - Total \$20.09 401(K) \$0.50 Pension \$10.00 Welfare \$9.59 Apprentice 5A - Total \$7.96 401(K) \$0.50 EOPR \$0.66 Mandatory Dues \$0.18 Welfare \$6.62 Apprentice 5B - Total \$15.90 401(K) \$0.50 Apprentice Fund \$1.02 EOPR \$0.68 Mandatory Dues \$0.18 Dension \$6.00			

After selecting a profile, the profile will be highlighted purple, and the user will be presented with a link to "Generate New Contribution" (or "Update Existing Contribution" if the selected report has already been started). This link will load the report entry screen.

Generate New Contribution Upload Contribution File			
	Generate New Contribution	Upload Contribution File	

There are four sections to this page: Document Summary, Add Member Rate, Contract Details, and the report entry grid.

The "Document Summary" gives a basic overview of the contribution report currently being entered. Note that the Doc. Balance is an active total, reflecting each change in the report entry grid as it is entered.

Contribution Document:						
Summary						
Doc. ID:	115	Current Balance:	\$ 0.00			
Doc. Effectivity:	10/01/2021-10/31/2021	Doc. Balance:	\$ 0.00			
Doc. Status:	Created on 02/18/2022	Total Balance:	\$ 0.00			
Employer:	R.F. MEEH COMPANY	Post Notification:				
Add Employee Rate						
Contract Details						

The "Add Member Rate" section allows employers to add additional members to the report. The Member ID or SSN must be supplied to add a member to the contribution report.

Add Employee Rate			
Employee ID or SSN:	Get Employee	Get employee search only retrieves members which are currently approved by the benefit	
Δ	dd new employee?	office.	

Choose the Labor Period and the Rate type then click the "Add Employee" button to add the member to the data entry grid. Members added through this method will be automatically added to the employer's contribution profile to appear on future contribution reports, as soon as the report is posted/approved by the Benefit Office.

Add Employee Rate	dd Employee Rate						
Employee ID or S	SN: 8639	Get Employee Add new employee?	Get employee search only retrieves members which are currently approved by the benefit office.				
Employee Name:	BACKOWSKI, DOUGL	AS J.					
Labor Period:	select	~					
Rate Type:		~	Add Employee				

Use this method to add rows to the data entry grid if data entry rows are needed for a different Rate Type for a member.

Add Member Rate							
Member ID or SSN: 11 Get Member							
	Add new member?						
Member Name:	В						
Labor Period:	select						
Benefit Code:	select Add Member						

The "Add new member" link is used to add a member who is not in the Benefit Fund's database.

Add Employee Rate			
Employee ID or SSN: 123123123	Get Employee	Get employee search only retrieves members	
🔕 Member not found.	Add new employee?	office.	

When clicked, a new window will appear for adding member information. The Employer Affiliation In Effect date must be set as when contributions begin for the new member, not necessarily the start date of their employment. Saving changes in this window will allow the new member to be added to the contribution report (same as above).

First Name:		Enrollee Type:	Primary	~	
Middle Name:		Sequence #:	1		
Last Name:		SSN:			
Contact Information		Gender:	Unknow	n 🗸	
Home Phone: Ex	ct:	Prefix:	~	1	
Home		Suffix:	~	1	
Address:		Birth Date:			
City:		Death Date:			
State:					
Zip:					
Employer Affiliations					
Employer	\$	In Effect	+ T	erm. Date	\$

The "Contract Details" section will allow users to view the rates available for each benefit.

Contract Details					
CONTRACT:					
Rate Group	Rate Type	Benefit Code	Benefit	Benefit Rate	Effectivity
L	ADMINISTRATIVE PERSONNEL	A DT	401(K)	0.5 per Hours	08/01/2021
L	ADMINISTRATIVE PERSONNEL	A DT	Pension	0 per Hours	08/01/2020
				20 per Hours	08/01/2021
L	ADMINISTRATIVE PERSONNEL	A DT	Welfare	0 per Hours	08/01/2020
				19.18 per Hours	08/01/2021
L	Apprentice 5A	5A DT	401(K)	0.5 per Hours	08/01/2021
L	Apprentice 5A	5A DT	Dues	0.18 per Hours	08/01/2021
	Apprentice 5A	5A DT	FOPR	0.66 per Hours	08/01/2021

# 4.1.1 Editable Grid – Single line per benefit code

				1	Return to	Profiles Sv	vitch to Hieran	chical Grid
SSN	\$ Name 🔺	Period 🗢	Rate Type 🔶	Benefit Code	U/M ≑	Quantity 🖨	Amount	Delete
1830	n, RAUL	01/01/2022 - 01/31/2022	Foreman	Foreman Reg	Hours	5.0000	\$ 158.05	
1830	n, RAUL	01/01/2022 - 01/31/2022	Foreman	Foreman OT	Hours	5.0000	\$ 211.53	
1830	n, RAUL	01/01/2022 - 01/31/2022	Foreman	Foreman DT	Hours	5.0000	\$ 264.90	
1048	ILTON R.	01/01/2022 - 01/31/2022	General Foreman	GenForeman Reg	Hours	0.0000	\$ 0.00	
1048	ILTON R.	01/01/2022 - 01/31/2022	General Foreman	GenForeman OT	Hours	0.0000	\$ 0.00	
1048	ILTON R.	01/01/2022 - 01/31/2022	General Foreman	GenForeman DT	Hours	0.0000	\$ 0.00	

Unless you selected Hierarchical Grid in your last login to Remit Express, this is the default entry format. The "Editable Grid" is used for profiles in which each employer only has a single rate type per grid row. Once a profile is loaded, the "Quantity" field can be updated for each record to reflect the correct contribution report total. The "Amount" column will calculate when the user tabs or arrows away from the Quantity entered. If a second rate type is necessary for the same member, the member will need to be added again through the "Add Member Rate" tab. If a second rate type is added, it will not be automatically stored for the next contribution period.

The Delete column at the far right can be checked to remove a member from the current Contribution Report, and from the Contribution Profile.

		<b>4.1</b>	.2 Editable Hiera	archical grie	d				
Colla	pse All Rows						Return to F	Profiles Switch to	Single-line Grid
	SSN	\$	Name	*		Pe	riod	Total A	mount
8	1830		in, RAUL		01/01/2022	- 01/31/2022			\$ 634.48
			Rate Type	Benefit Co	de	U/M	Quantity	Amount	Delete
			Foreman	Foreman Reg		Hours	5.0000	\$ 158.05	
			Foreman	Foreman OT		Hours	5.0000	\$ 211.53	
			Foreman	Foreman DT		Hours	5.0000	\$ 264.90	

# The "Editable Hierarchical Grid" will allow for multiple rate types for the same member record during the same contribution period. The collapsed member record will total the hours for that member for each rate type associated with the member.

The Delete column at the far right can be checked to remove a member from the current Contribution Report, and from the Contribution Profile.

#### 4.1.3 Footer buttons

#### Save Changes Review & Post

The "Save Changes" button will allow you to leave the data entry screen and save your work. Remit Express returns to the Select a Profile screen. When you select the correct Profile and Work Period, you will notice that the Generate New Contribution link now says "Update Existing Contribution":

Update Existing Contribution Upload Contribution File

This link will take you back to the Contribution Report data entry screen, with the information that you previously saved.

If you have entered all the data for your contribution report, click the Review & Post button. You have not yet posted your contributions.

#### The contribution report will not be sent to the benefit office until the "Post" button has been clicked.

A summary grid by benefit code will display to help the user check their data entry.

Rate Type	Apprentice + Training Fund	CTAF Facility Fee	International Dues	Pension	International Training	Training- Site	Union Dues	Welfare	# of Employees	Total Due
SITE 1- GeneralReg	39.20	) 11.20	154.00	2,724.40	19.60	44.80	347.20	2,643.20	2.00	5,983.60
SITE 2- GeneralT&H	1.40	0.40	5.50	97.30	0.70	1.60	18.60	94.40	2.00	219.90
Document Sun	202201									
Document Sun	nmary									
Document Sun Document Tota	nmary	\$ 6,203.50								
Document Sun Document Tota Payment Metho	nmary I: Dd: Check	\$ 6,203.50								
Document Sun Document Tota Payment Metho ACH Bank Trar	nmary I: Check	\$ 6,203.50 <b>&gt;</b> \$ 1.00								
Document Sun Document Tota Payment Metho ACH Bank Trar	nmary I: Check Isfer Amount:	\$ 6,203.50 <b>v</b> \$ 1.00								

If the contribution report is incorrect, click the "Return to Edit Mode" button to change the entered data.

If the total is correct, select the correct Payment Method from the dropdown list and click the "Post Document" button.

If the employer is set up to pay by ACH, and this is the desired payment method, choose "ACH Withdrawal" from the Payment Method dropdown list:

Document Summary				
Document Total:	\$ 6,203.50	]		
Payment Method:	ACH Withdrawa 🗸	Payment Date:	02/18/2022	{max 02/25/2022}
The payment date entered is the earlies	st date the payment is auth	orized for withdrawal. \	Withdrawal date ma	ay occur after this date
ACH Bank Transfer Amount:	\$ 6,203.50			
Save Changes Post Doc	ument Return to	Edit Mode		

The user can select a Payment Date, then clicks the "Post Document" button.

You can also select to pay by check and mail to : IBEW Local 150 PO Box 7126 Carol Stream, IL 60197-7126

### 4.2 Upload Contributions

To enter contribution reports by uploading a file, the user will begin exactly as if they were submitting a Contribution Report manually.

Note: The uploaded file must exactly match the expected format provided by the Benefit Office

- 1. Log into Remit Express with a "EmployerContribute" or "EmployerAdmin" user account
- 2. Select "Enter Contributions" from the toolbar



The user will be prompted to select the Work Period and profile to use. Select the correct Work Period from the dropdown list. Most employers only have 1 profile. Only the earliest time period for each profile will be available to choose from. The profiles will initially be setup by the benefit office.



After selecting a profile, the profile will be highlighted purple, and the user will be presented with links to "Generate New Contribution" (or "Update Existing Contribution" if the selected report has already been started) and "Upload Contribution File."

Generate New Contribution Upload Contribution File

The user will be presented with an "Upload File" screen. Clicking the "Choose File" button link will begin the upload selection process.

Select a file to upload: Choose File No file chosen Upload File

The user navigates the Open File window to locate the contribution file on the user's computer and click the "Open" button. The filename will populate the Choose File textbox. Click the "Upload File" button.

If the upload file is successful, an Upload Results screen will be displayed. The uploaded information still has not been submitted.

The co	ntribution report will	not be sent t	o the benefit office	e until the "Post	" button ha	s been clic	ked.	10001101101100
<b>Uploac</b> File Sta Em	f results: e Size: 0 ttus: Uploaded Success ail Notification:	fully						
	Employee Name	Period \$	Benefit Code	Contract Code 🖨	Quantity 🗢	Amount 🖨	Calculated Amount \$	Warning Message 🔶
	SALVATORE	202112	GeneralReg		29.51	\$ 630.62	\$ 630.62	
	SALVATORE	202112	-GeneralDT		64.50	\$ 1,458.36	\$ 1,458.36	
	SALVATORE	202112	GeneralT&H		2,065.70	\$ 45,424.75	\$ 45,424.75	
	MINEZ, JOSE L.	202112	GeneralReg		29.51	\$ 630.62	\$ 630.62	
	MINEZ, JOSE L.	202112	-GeneralDT		32.00	\$ 723.52	\$ 723.52	
	MINEZ, JOSE L.	202112	GeneralT&H		1,490.26	\$ 32,770.71	\$ 32,770.81	Amount Does Not Match Calculated Amount
	MANUEL G.	202112	-GeneralDT		8.00	\$ 180.88	\$ 180.88	
	MANUEL G.	202112	GeneralReg		29.51	\$ 630.62	\$ 630.62	
	MANUEL G.	202112	GeneralT&H		339.37	\$ 7,462.64	\$ 7,462.74	Amount Does Not Match Calculated Amount
	LES, CANDIDO	202112	-GeneralDT		16.00	\$ 361.76	\$ 361.76	

The Upload Results grid contains a "Warning Message" column. Any errors listed in this column must be reviewed and corrected before the contribution report is posted.

After the file has successfully uploaded, please refer to section 4.1.3 of this document "Footer Buttons" to finish posting the contribution report.

#### 4.2.1 File Format

The benefit office will work with employers to define the file upload requirements.



There are five report options available in Remit Express; View invoice, two contribution reports and two member reports.

#### 5.1.1 View Invoice

This report allows the employer to view the invoice at any stage in the submitting process, including after the Benefit Office has approved the invoice. Prior to the benefit office approval the Invoice has a status of *Waiting for Approval*.

Example of how the invoice will appear:

Profile: 00323 V To: 01/01/2022 - 01/31/2022	View Report	
<b>Ξ Contributio 1</b> / 2   −	27% + 🗄 🔊	± 🖶 :
	SHEET METAL LOCAL 38 WELFARE FUND WEIFT WITH LOCAL 38 WELFARE FUND MINING WITH WITH METAL MINING WITH WITH WITH METAL MINING WITH WITH WITH WITH WITH WITH WITH WITH	

### 5.1.2 Contribution Summary

This report provides the total employer number of hours worked and amount spent by product for the specified time period. If the selected time period covers more than one contribution report, the totals are grouped together.



#### 5.1.3 Contribution Detail

The report provides a summary of each contribution report by employer. By default, the report is broken out by member name and benefit code. Each benefit code can also be broken out by product. If the selected time period covers more than one contribution report, the totals are reported separately.

🛞 Remit Express	Home	ACH AG	xount   Enter Contrib	utions Upload Contribu	tions   Report	s   Contact Us   Log Out
From: 11/1/2007 🔽 To	p: 11/30/2007 💌		Show Product Amounts	View Report		
4 4 1 of 1 ▶	▶ 100%	/	Find   Next	Select a format 🛛 Exp	ort 😰	
Company: A Employer: B			А			<u>^</u>
Date From: 11/1/2007 Date To: 11/30/2007			в			
5410 10. 1110012001			Contribution I	Details		
Period Date Member Name	Benefit Code	U/M	Product Description	Quantity	Amount	=
11/01/2007 - 11/30/2007						
D	LIDE RIVE Irow	Hours				
	OFF&WFJIIIy	Hours	Union	15 0000	\$11.25	
			Training	15.0000	\$0.75	
			Per Capita	15.0000	\$2.25	
			Welfare	15.0000	\$127.50	
	UPF&WF-Wel&ITF	Hours				
			Training	10.0000	\$0.50	
			Welfare	10.0000	\$85.00	
					\$227.25	
J.						
	UPF&WF-Wel&ITF	Hours				
			Training	10.0000	\$0.50	
			Welfare	10.0000	\$85.00	
					\$85.50	
s .						
	UPF&WFJrny	Hours				
			Union	15.0000	\$11.25	*
				Ren	nit Express - part of	the Visual HCS family of products
						© Copyright BSTI 2010

### 5.1.4 Employee Summary

This report provides the total member number of hours worked and amount spent by product for the specified time period. If the selected time period covers more than one contribution report, the totals are grouped together.



#### 5.1.5 Employee Detail

The report provides a summary of each contribution report by member. By default, the report is broken out by benefit code. Each benefit code can also be broken out by product. If the selected time period covers more than one contribution report, the totals are reported separately.

🛛 🛞 Remit Ex	press	Ho	me   ACH Accou	unt   Enter Contrib	utions   Upl	oad Contribution	s   Reports	Contact Us   Log Out
Member ID or SSN: 8	01095546 Fro	om: 11/1/	2007 💌	To: 11/30/2007	Prod Amo	ihow uct V unts	iew Report	
14 4 1	of 1 👂 🕅	100%	×	Find   Next	Select a for	mat 💌 Export	¢	]
Company: A. Employer: B Member: D Date From: 11/1/2007 Date To: 11/30/2007				A B Employee D	etails			
Period Date	Benefit Code	U/M	Product Descrip	otion	Qua	intity	Amount	
11/01/2007 - 11/30/200	7	Hours						
	er rannoni,	- Hours	Union Training Per Capita Welfare		15.0 15.0 15.0 15.0	0000 0000 0000	\$11.25 \$0.75 \$2.25 \$127.50	
	UPF&WF-Wei&ITF	Hours	Training Welfare		10.0 10.0	0000	\$0.50 \$85.00 \$227.25	
Report Total:							\$227.25	
							v	-
						Remit Ex	press - part of t	he Visual HCS family of products © Copyright BSTI 2010