9/29/2026

REX Instructions

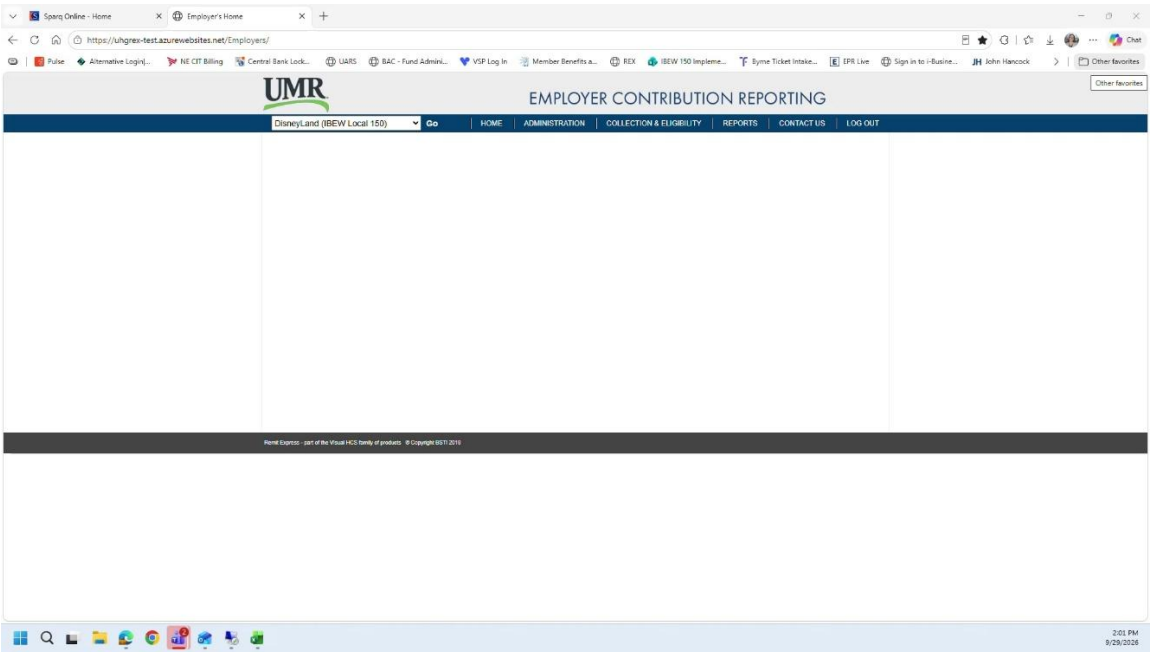
IBEW 150 MPRs

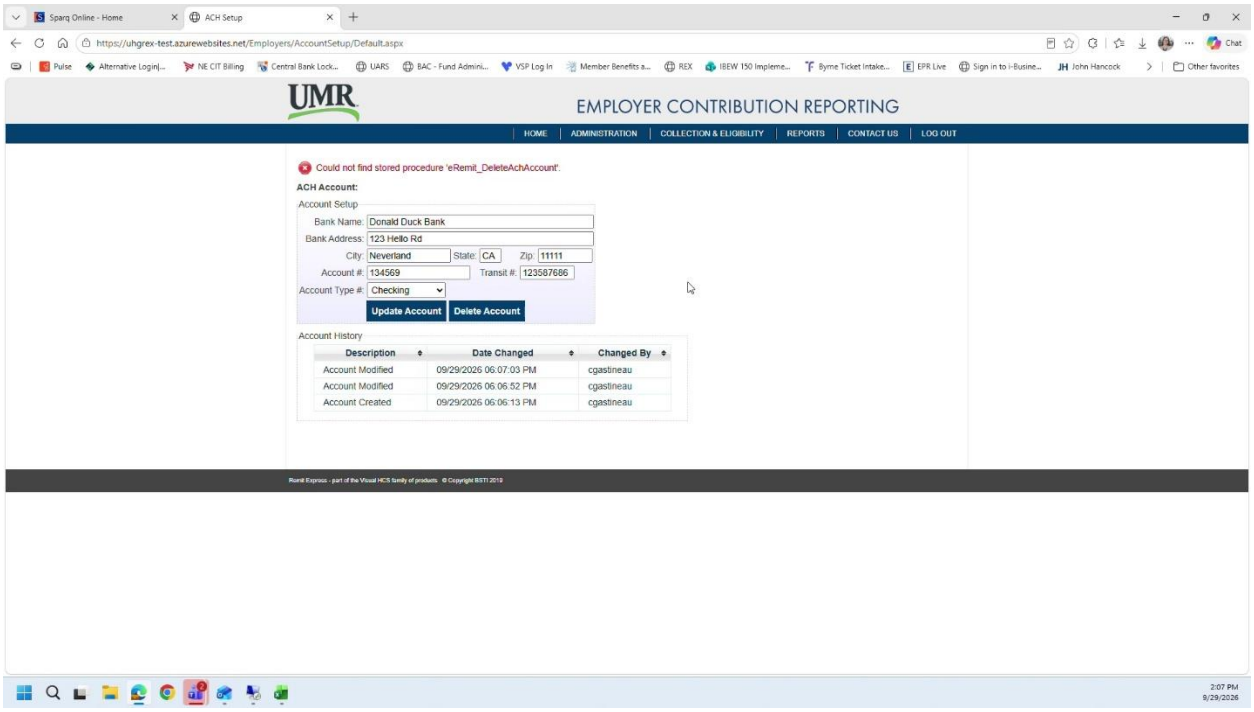
Gastineau, Sandy

UMR

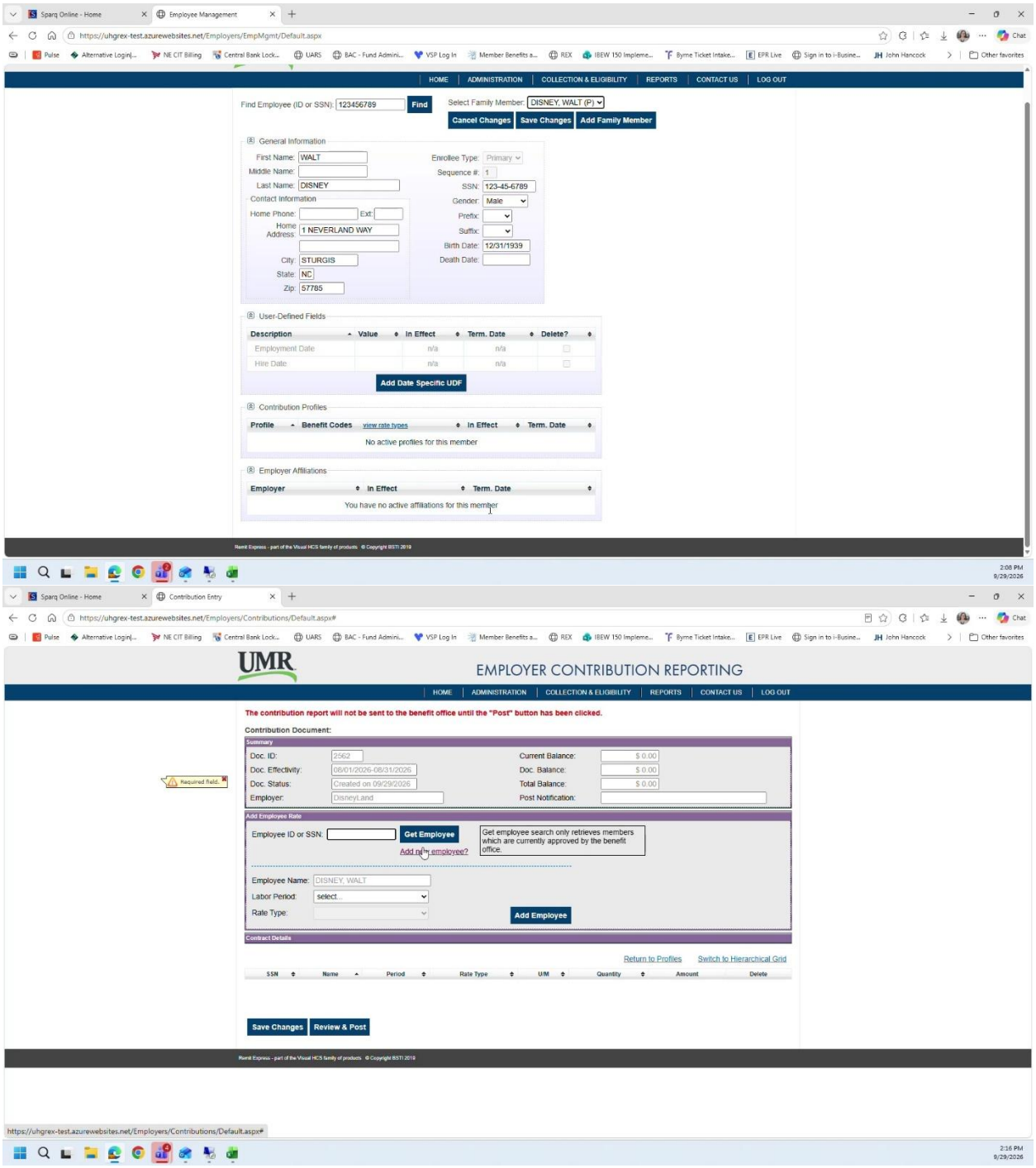
REX Instruction for IBEW 150 September 29, 2026

Meeting notes:

- **Remit Express Navigation And Access:** Sandy introduced Remit Express for IBEW 150 employers, explaining that employer users see only their own employer while administrators can access all accounts, and reviewing the home-screen areas for administration, employees, contributions, reports, and support.
    - **Screen Layout:** The home screen contains announcements and updates. Administration provides ACH setup; Employee Management supports member records; Collection and Eligibility contains contribution reporting and payments; Reports provides historical and summary information; and Contact Us is being redesigned to include frequently asked questions and contact details.
    - **Employer Access:** Sandy explained that their administrative view differs from employer users because they can access all Remit Express employers, whereas each employer user is limited to their own employer. Employer users do not need the User Accounts area.
    - **Support Page:** The future Contact Us page will include common troubleshooting answers so employers can resolve routine issues before contacting the team, along with the IBEW 150 Fund Administrator email address and the contributions-related telephone number.
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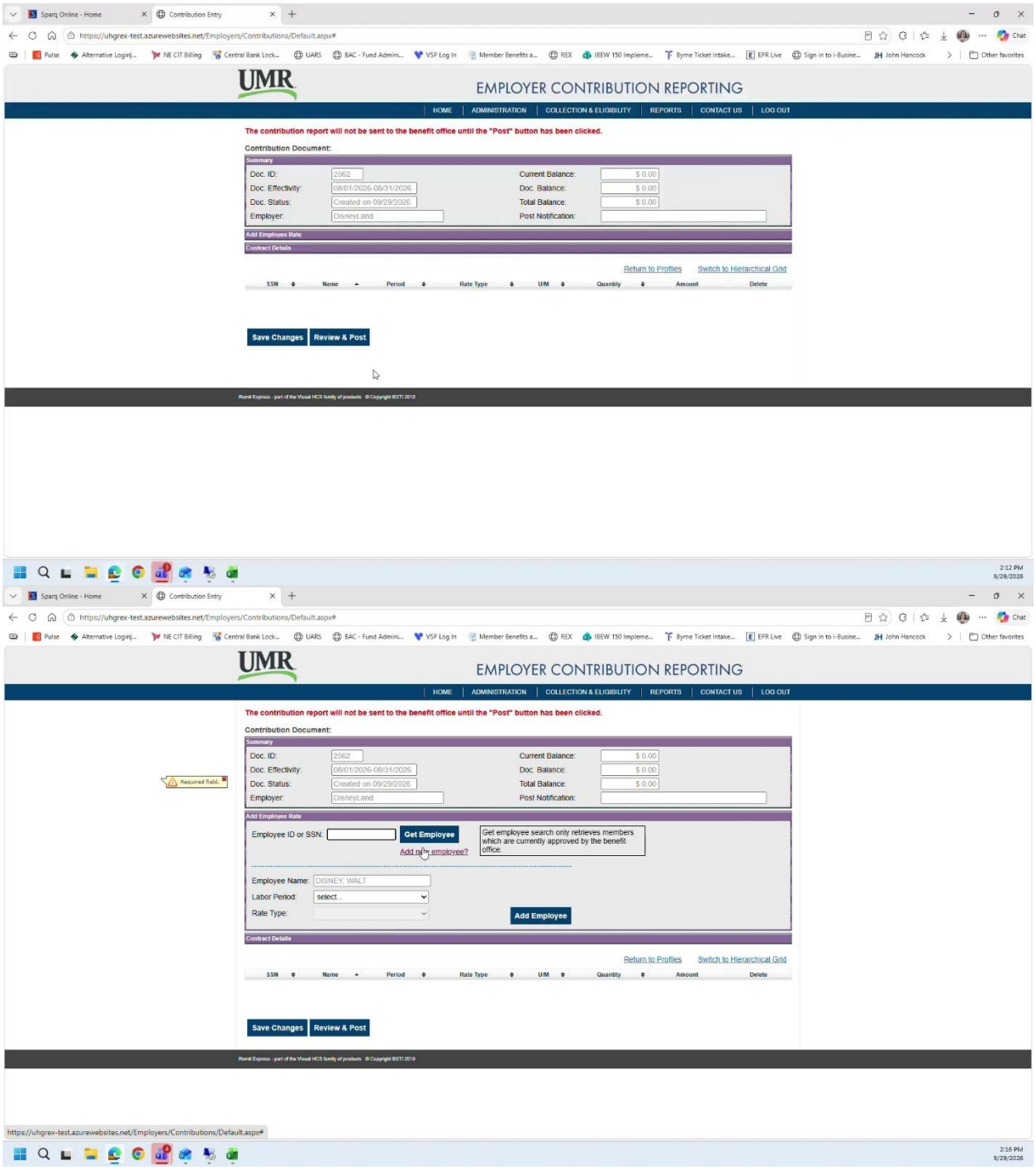
- **ACH Bank Setup And Electronic Payments:** Sandy explained that IBEW 150 requires electronic payment reporting through ACH, demonstrated bank-account setup and history tracking, and clarified that even zero-hour reports require bank information but do not withdraw funds.
    - **Bank Information:** Employers must enter the bank name, address, city, state, ZIP code, account number, transit number, and account type. Account numbers must contain 6–17 characters, transit numbers must contain 9 characters, and checking is the default account type Sandy recommended leaving selected.
    - **Account Approval:** After an employer creates or modifies an ACH account, Sandy receives an alert for approval. Account History records whether the account was created or modified, when the action occurred, and which user performed it; deleting an account requires confirmation.
    - **Zero-Hour Reports:** Because electronic payment is mandatory, Remit Express will not allow an employer to submit a zero-hours report without bank information. A zero-hours report does not debit the checking account because it contains no hours or contributions, so employers should complete ACH setup before submitting such reports.
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- **Employee And Contract Profile Management:** Sandy demonstrated how employers locate existing employees, add new employees, review affiliations and classifications, and obtain missing contract profiles through the Fund Office.
    - **Employee Search:** Employers can search by Social Security number or employee ID. If the person is already approved and present in the system, Remit Express retrieves their name and record, where employers can review classifications, family members, contact information, date of birth, contribution profiles, and employer affiliations.
    - **Record Changes:** Employers can correct contact information or other employee details and save the changes. Sandy receives an alert to review and approve the update.
    - **New Employees:** If the employee search does not find a person, the employer can select Add New Employee, enter the required personal information, save the record, and then add the person to the contribution report. Sandy receives an approval alert, but the new employee can still be added to the report.
    - **Missing Contracts:** Kati asked what to do when an employee is reporting under a new contract but the contract is not displayed. Sandy answered that the employer should email the IBEW 150 mailbox or contact Sandy so they can create the profile based on the signed letter of assent and contract information.



- **Contribution Report Entry And Validation:** Sandy walked through selecting a work period, generating a report, adding employees and rate types, entering wages and hours, saving unfinished work, and validating the resulting contribution calculations.

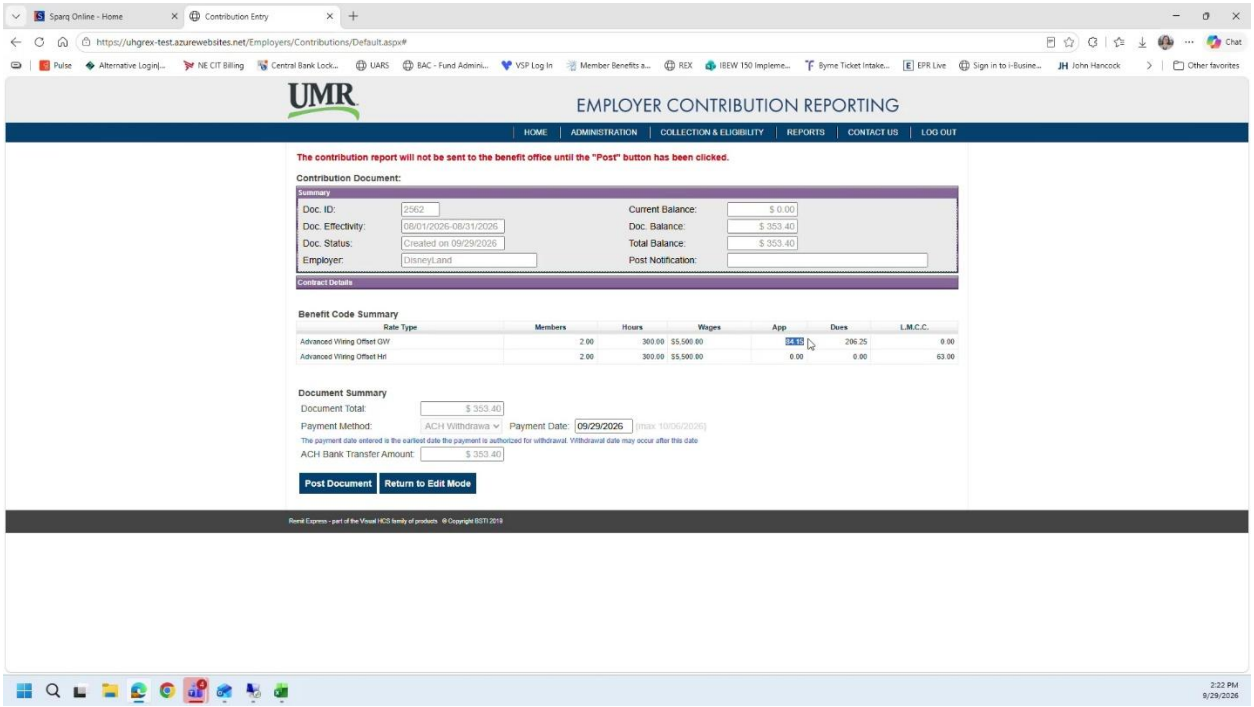
- **Work Period Selection:** The employer must select the intended work month and click Go; changing the displayed month without clicking Go does not update the report. Sandy emphasized that the labor period, work period, and document effectivity dates should all correspond to the same reporting period.
- **Rate Types:** Employers see only the contracts applicable to their profile. Dues, LMCC, and JATC-only reporting is handled under the dues contract, while other work must be reported under the relevant Inside Wireman, VDV, or other contract. Sandy noted that outdated or inapplicable rate-type choices have been removed where possible.
- **Units Of Measure:** Most IBEW 150 members require two lines: a gross-wage line for benefits calculated from total wages and an hourly line for benefits calculated from hours. Health and welfare, WRA, LMCC, and NLMCC are hourly-based, while pension, supplemental pension, vacation, and administrative dues are wage-based.
- **Saving Reports:** Employers can select Save Changes if they need to pause. The report remains in Created status and can later be reopened through Update Existing Contribution using the same document ID.
- **Balance Calculation:** The document balance reflects the current report, while total balance combines the document balance with the employer's current balance. Sandy clarified that posting the report ACH-debits only the document balance, not an unrelated current balance that may still be under audit or reconciliation.

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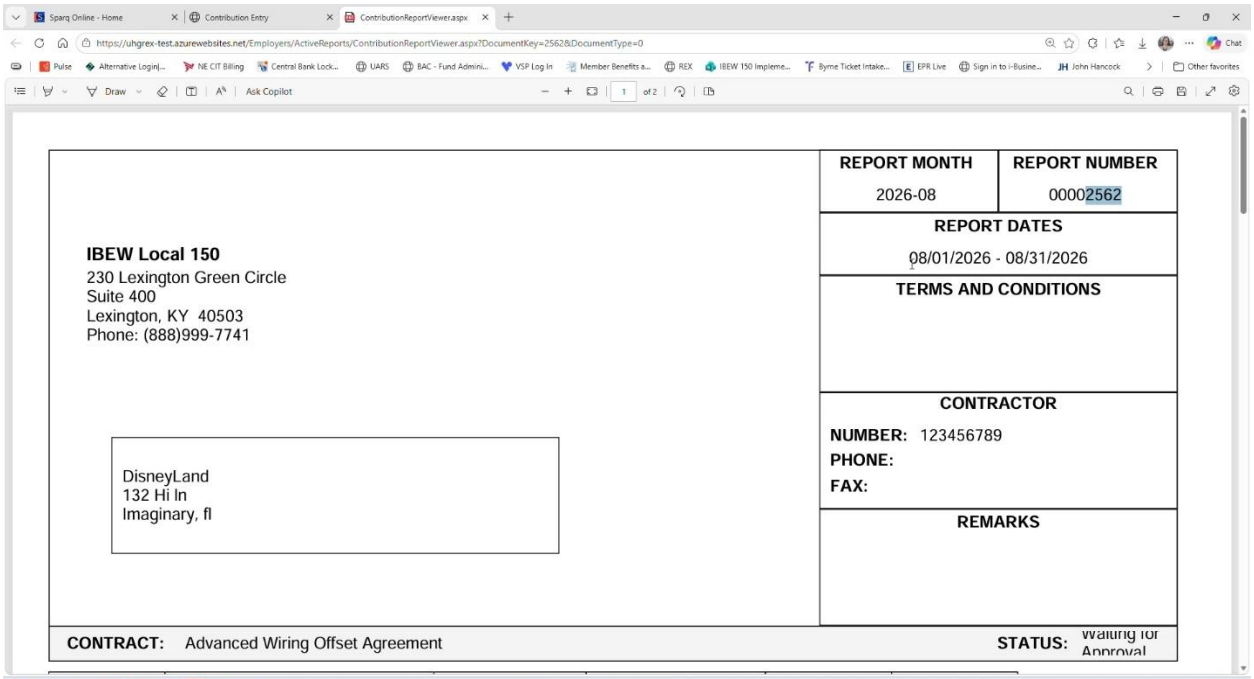
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- **Posting And Payment Timing:** Sandy explained the review, posting, ACH scheduling, and correction process, emphasizing that reports are not received by the benefit office until Post Document is selected and recommending submission before the 15th-day deadline.

- **Review Summary:** Before posting, the Review and Post screen shows members, hours, wages, benefit-code calculations, document total, payment method, and payment date. The payment method is ACH because checks are no longer available for this process.
- **Posting Requirement:** A report in Created status has not been sent to the benefit office. The employer must select Post Document to submit it; otherwise Sandy will not receive or process the report.
- **Payment Dates:** Production allows a payment date up to 10 days in advance. Employers may enter a future effective date so the report is submitted while the ACH withdrawal is scheduled for when funds are available.
- **Deadline Planning:** Sandy recommended keying reports and sending payments by the 13th even though the employer cutoff is the 15th. This allows time for processing and bank clearing, particularly when the 15th falls near a weekend.
- **Post-Submission Corrections:** If Sandy has not yet approved or posted a report, they can return it to the employer for correction. If it has already been posted, Sandy can delete it so the employer can re-enter it. Employers should contact Sandy promptly when they identify an error.



- **Invoices And Contribution Calculations:** Sandy demonstrated the posted invoice, including report identifiers, employee lines, contract details, benefit summaries, and the calculation of wage-based and hour-based remittances.
    - **Invoice Identification:** The invoice includes the report month, report number or document ID, work-period dates, contractor information, employer number, address, contract, status, and employee roster. A blue document hyperlink opens a PDF that can be saved or printed.
    - **Employee Lines:** Each reported member appears with the applicable rate types, reporting dates, gross dollars, and hours. The order of lines follows the order in which rate types were added, so Sandy recommended selecting the gross-wage rate type before the hourly rate type when consistent ordering is desired.
    - **Benefit Breakdown:** The invoice separates wage-based and hourly-based products. In the example, apprenticeship and dues were calculated from $6,000 of gross wages, while LMCC was calculated from 300 hours. The displayed subtotals combine into the total remittance.
    - **Rate Display:** Some combined products may display a zero rate under an individual line because the product includes multiple components. Sandy explained that employers can divide the calculated amount by total hours to check the effective hourly amount until the display is updated.
    - **Invoice Status:** A newly posted report may initially show Waiting for Approval. After Sandy processes it, the status changes to Posted, providing another way for employers to confirm receipt and completion.

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REPORT MONTH	REPORT NUMBER
2026-08	00002562

REPORT DATES
08/01/2026 - 08/31/2026

TERMS AND CONDITIONS

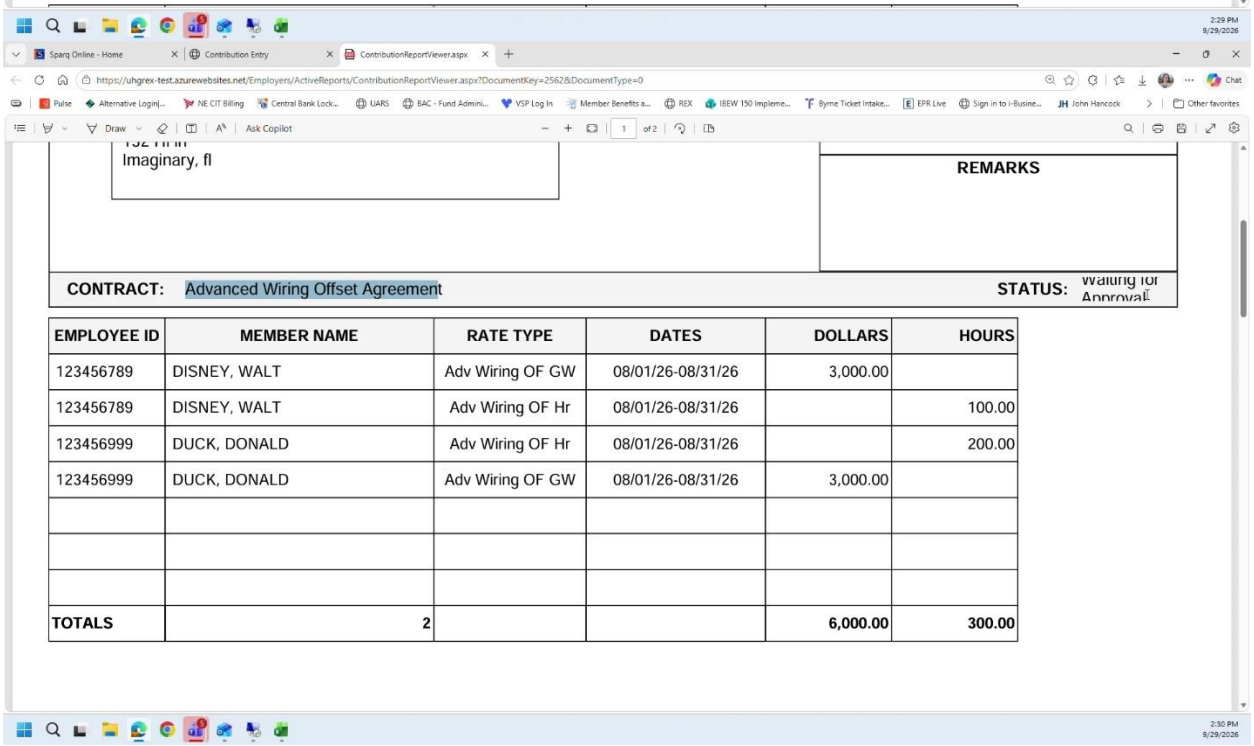
IBEW Local 150
230 Lexington Green Circle
Suite 400
Lexington, KY 40503
Phone: (888)999-7741

DisneyLand
132 Hi In
Imaginary, fl

CONTRACTOR
NUMBER: 123456789
PHONE:
FAX:

REMARKS

CONTRACT: Advanced Wiring Offset Agreement **STATUS:** Waiting for Approval

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Imaginary, fl

REMARKS

CONTRACT: Advanced Wiring Offset Agreement **STATUS:** Waiting for Approval

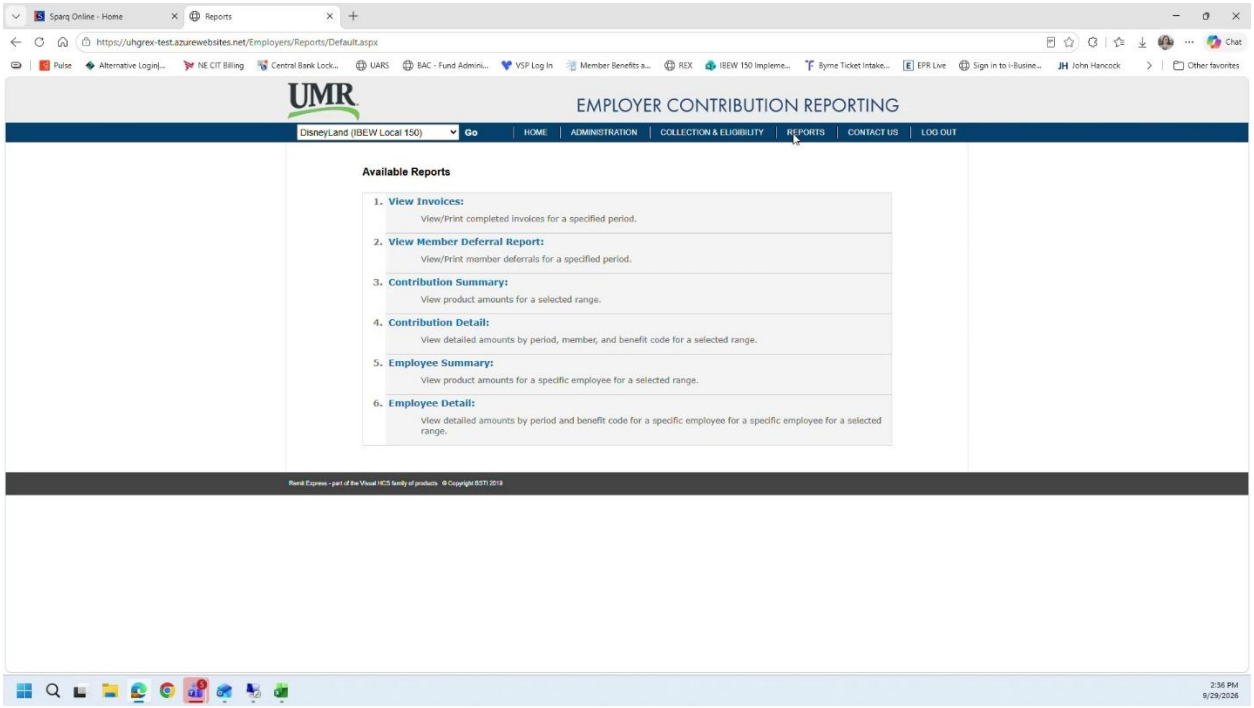
EMPLOYEE ID	MEMBER NAME	RATE TYPE	DATES	DOLLARS	HOURS
123456789	DISNEY, WALT	Adv Wiring OF GW	08/01/26-08/31/26	3,000.00	
123456789	DISNEY, WALT	Adv Wiring OF Hr	08/01/26-08/31/26		100.00
123456999	DUCK, DONALD	Adv Wiring OF Hr	08/01/26-08/31/26		200.00
123456999	DUCK, DONALD	Adv Wiring OF GW	08/01/26-08/31/26	3,000.00	
TOTALS	**2**			**6,000.00**	**300.00**

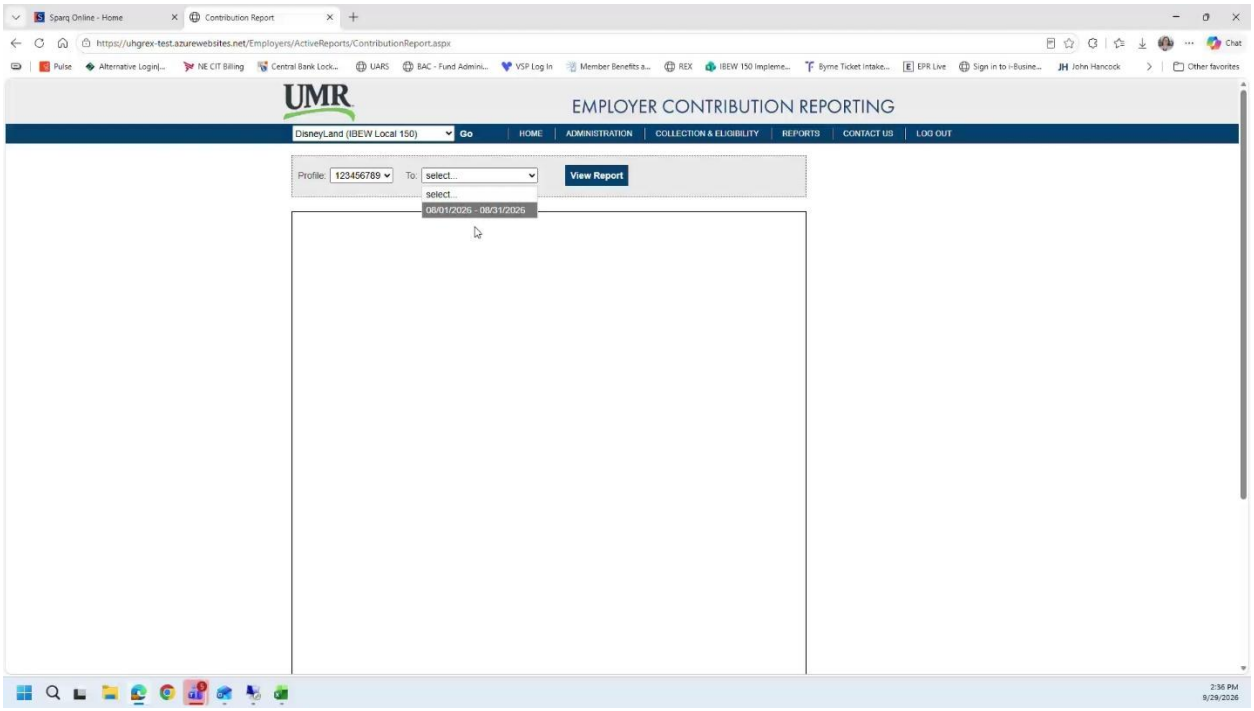
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- **Additional Payments And Historical Reports:** Sandy explained how to submit separate ACH payments for audits, short pays, corrections, or liquidated damages and reviewed the available report-history and summary tools.
    - **Make Payment:** Employers should use Make a Payment when they owe an additional amount because of an audit, incorrect rate, short pay, balance, or

liquidated damages and interest. They should enter the amount, payment date, and a descriptive comment so the Fund Office can apply the payment correctly.

- **Payment Requests:** After submitting an ACH payment request, the request appears with its creation date, user, payment date, amount, and comments. If the amount was entered incorrectly before processing, the employer can remove the selected payment request and submit it again.
- **Historical Invoices:** View Invoices allows employers to select an employer profile and work-history date to retrieve prior invoices, with at least eight months of history expected. Sandy stated that they personally find it easier to change the work month under Enter Contributions and open the document listed for that period.
- **Available Reports:** Contribution Summary shows product amounts for a selected range, while Employee Summary shows amounts associated with a particular employee. The member deferral report does not apply to IBEW 150, and some displayed report options are standard programmer features that have not yet been removed.



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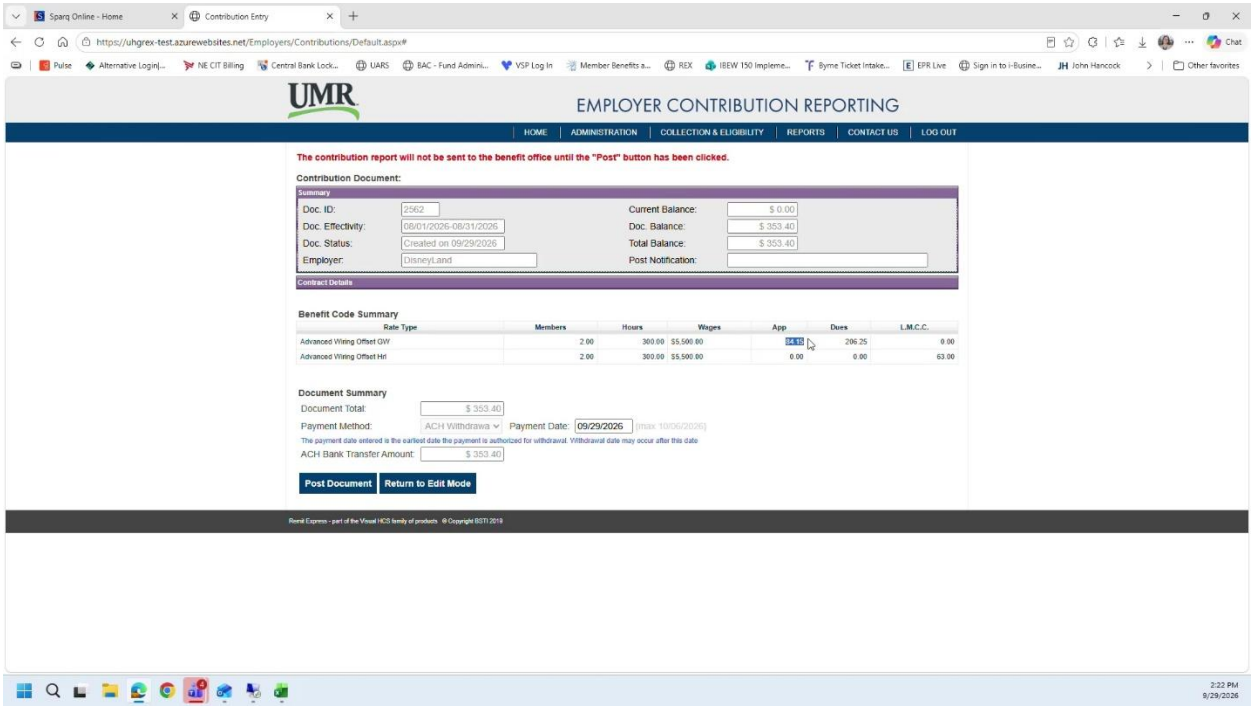
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- **Corrections And Credit Application:** Sandy described how to correct omitted employees, incorrect wages or hours, and wrong historical rate types, and explained how credits are applied through coordination with the Fund Office.
  - **Omitted Employees:** To correct a past month, the employer selects the relevant work period, generates a new contribution, and manually adds employees who were not present on the original report. Employees added to a current report should populate future reports, but they do not automatically populate reports for earlier months.
  - **Correcting Amounts:** Employers can add correction lines and enter negative wages or hours to reverse an earlier mistake, then add the correct positive line. The system recalculates the discrepancy and may produce an amount owed or a standing credit.
  - **Unit Accuracy:** Sandy emphasized entering each amount on the correct wage or hour line. Misplacing hours or wages can incorrectly affect multiple products, including vacation, pension, supplemental pension, and other benefits.
  - **Credits:** Caren asked how a current-balance credit is applied. Sandy answered that the employer should notify the Fund Office and request application to the next month's report, subtract the credit from the amount

owed, and use Make a Payment for the remaining amount. Sandy can cancel the document's automatic ACH withdrawal and apply the credit and separate payment appropriately.

    - **Month-By-Month Corrections:** Jeremy asked whether using the wrong dues report requires corrections for each month. Sandy confirmed that each affected month must be corrected by adding a negative line for the incorrect rate type and a positive line for the correct rate type so the changes flow properly to pension, WRA, vacation, John Hancock, and traveler reciprocity records.

- **EPR Live Relationship And Future Enhancements:** Sandy clarified that Remit Express does not replace EPR Live for employers reporting through the NECA chapter and noted that an upload template is being developed for future use.
    - **EPR Live Usage:** In response to the question about replacement, Sandy stated that EPR Live remains controlled through the NECA chapter and employers currently using it should continue reporting there. Remit Express is used for additional payments or adjustments not handled through EPR Live, including liquidated damages and interest.
    - **Upload Enhancement:** Gloria asked whether employers could upload a template instead of entering employees manually. Sandy said they are working with programmers on an upload enhancement and hope to make it available in the future.
- **Multi-Role Reporting:** Sandy explained how to report employees working under multiple classifications, distinguishing same-contract rate types from work performed under separate contracts.
    - **Same-Contract Roles:** Dylan asked about an employee who works as a journeyman for part of a month and a foreman for the remainder under the same agreement. Sandy explained that fringe calculations are the same for the classifications, so the employer may use the journeyman rate type or separate the work with additional lines; the system will ask for confirmation when adding another line.
    - **Separate Contracts:** If an employee changes between classifications with different fringe structures, such as CW5 and apprentice work, the hours must be reported under separate contracts. Sandy stated that both applicable contracts should be available to the employer for submission.

- **Pre-Posting Validation Limits:** Diane raised concerns about not being able to verify calculations by employee before submission, and Sandy clarified that the system provides a product-level benefit summary and offered individual assistance.
    - **Available Validation:** Diane explained that their manual calculation and payroll system matched each other but differed from Remit Express, making it difficult to identify the source of the discrepancy. Sandy clarified that Remit Express cannot display a detailed pre-posting invoice by individual member.
    - **Product Summary:** Sandy explained that the Benefit Code Summary shown during Review and Post breaks calculations down by product or benefit code before Post Document is selected. Employers can compare categories such as apprenticeship, dues, and LMCC to their worksheets, but cannot isolate the amount by individual employee.
    - **Correction Window:** If an error is found after posting but before Sandy's approval, the employer should contact Sandy so the report can be returned to Created status and the ACH canceled or prevented. If necessary, Sandy can delete the posted report so it can be rekeyed.
    - **Direct Assistance:** Sandy offered to work individually with Diane and other employers to identify discrepancies and ensure they can use the system correctly for their specific agreements.
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Follow-up tasks:

- **Contract Profile Setup:** Email the IBEW 150 email box if a newly adopted reporting contract is missing from an employer's Remit Express profile. (Employers)
- **ACH Banking Setup:** Update Remit Express with bank account information so electronic payments and zero-hours reports can be submitted. (Employers)
- **Monthly Report Submission:** Key and submit monthly reports by the 13th to allow payment processing before the 15th cutoff and reduce potential penalties. (Employers)
- **Report Corrections:** Contact Sandy before she approves a submitted report if an error is found so the report can be returned for correction and any pending ACH withdrawal canceled. (Employers, Sandy)
- **Credit Application:** Notify the Fund Office and Sandy when requesting that a current-balance credit be applied to the next month's report, and use the Make a Payment feature for the net amount. (Employers, Sandy)
- **Perry Electric Reconciliation:** Work with Diane to investigate why Perry Electric's Remit Express calculation differs from its manual calculation and identify the discrepancy. (Sandy, Diane)
- **Historical Report Corrections:** Correct reports filed under an incorrect dues or contract rate by submitting a negative adjustment and the correct rate for each affected work month. (Employers)
- **Correction Support:** Coordinate one-on-one with Sandy when multiple historical corrections are required to ensure the adjustments are entered correctly. (Employers, Sandy)

Contact Information

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