

# EMPLOYER REMITTANCE REPORTING GUIDE



## Your Guide to EmployerXG

An Overview of the EmployerXG Online Reporting Tool for  
Contributing Employers of the Southwest Carpenters Trust



CARPENTERS  
SOUTHWEST  
ADMINISTRATIVE  
CORPORATION



# WELCOME!

**Thank you for being a Contributing Employer to the Southwest Carpenters Trust.** As a result of our efforts to improve and simplify the contribution reporting process, we have implemented a new product called EmployerXG. This new and easy to use online remittance reporting tool will allow you to submit monthly remittance reports and payments online in a secure and safe manner.

This guide will provide you with all the information you need to help you navigate through the EmployerXG Remittance Portal. If you have any questions or need assistance accessing EmployerXG, please contact the Employer Services Department at the Administrative Office.

## EMPLOYER REMITTANCE REPORTING OVERVIEW

You are obligated to make fringe benefit payments on behalf of your employees if you are a signatory employer to one or more Collective Bargaining Agreements with the Southwest Regional Council of Carpenters, or bound by one or more written agreement(s) to remit contributions to the Southwest Carpenters Trust. The benefit funds you are required to contribute to and the contribution amounts due are outlined within the agreement(s) to which you are bound.

## WHEN ARE CONTRIBUTIONS DUE?

You are obligated to submit contributions (remittances and payments) on behalf of each employee performing work covered by the terms and conditions of your Collective Bargaining Agreement or other written agreement, regardless of the employee's affiliation with the Southwest Regional Council of Carpenters.

Monthly remittances and associated payments are due on the 15th of each month and are considered delinquent if they are received after the 25th of the month. If the 25th of the month falls on a weekend or holiday, remittances and payments must be received by the Administrative Office by the preceding work day. Liquidated Damages and Interest will be assessed on late or unfunded remittances.

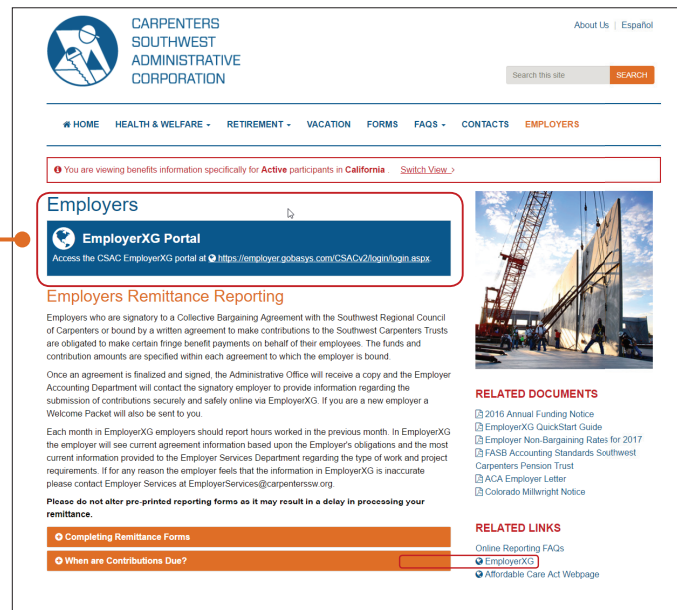
Remember, if a project is completed or inactive, please inform the Employer Services Department at the Administrative Office so you will no longer be billed for that project.



# ACCESSING THE EMPLOYERXG ONLINE REMITTANCE PORTAL

You can access EmployerXG in two easy ways.

1. Visit the Trust Fund website at [www.carpenterssw.org](http://www.carpenterssw.org). Before you enter the website Home Page, you are required to select your Status, State, and Preferred language. Once you are on the Home Page, click on the Employers Tab. Next, follow the link to the EmployerXG Remittance Portal.
2. You can also access EmployerXG directly at [employer.gobasys.com/CSACv2/login/login.aspx](https://employer.gobasys.com/CSACv2/login/login.aspx)

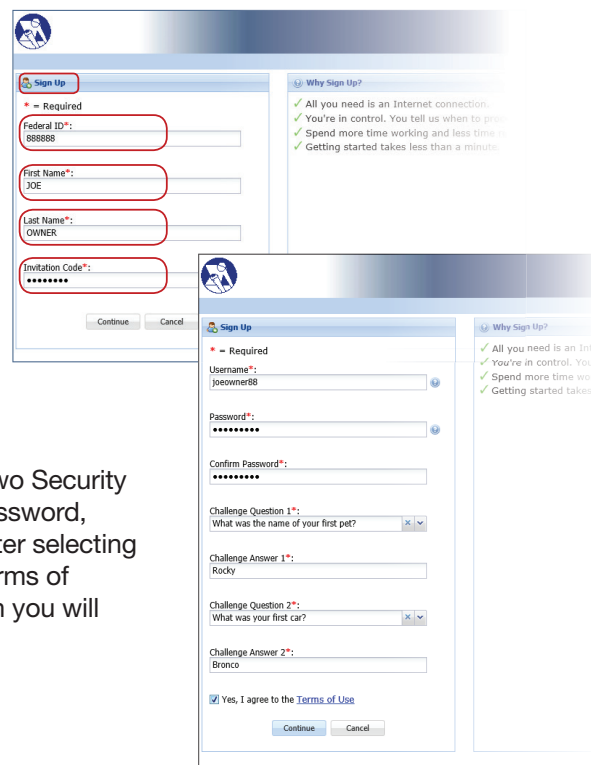


## GETTING STARTED: CREATING YOUR PROFILE

To create an EmployerXG account, you will need the invitation code that was included in your *Invitation to Remittance Reporting* letter. If you lost or misplaced your invitation code, please contact the Employer Services Department at the Administrative Office.

Begin by clicking the “Sign Up” link located on the bottom right of the website Home Page. On the following page, you will enter your Federal ID Number, First and Last Name, Invitation Code and click continue.

Next, you will be asked to create a Username, Password and two Security Questions. To view the requirements for your username and password, hover your mouse over the blue icon next to the entry fields. After selecting a username, password and two security questions, view the Terms of Use and check the “Yes, I agree to the Terms of Use” box. Then you will continue to follow the prompts to complete your profile.



# YOUR HOME PAGE

Once you log into your account, you will have access to the four main tabs below:

- **Home:** When you select the Home Tab, you will see a display of the reports that are currently due. If there are delinquent reports, they will be marked with red exclamation marks.

From the Home Tab you can:

- ← Open a Remittance
- ← Copy an Existing Remittance
- ← Upload a Remittance File and Receive Progress Information on the Upload. (Please contact the Administrative Office for assistance with mapping your file for upload.)
- ← Create a “No Work Remittance”
- ← Create a New Remittance
- ← Access
  - News and Information
  - History
  - Employer Profile
  - Personal Profile

- **History:** When you select the History Tab you will see a grid of your Remittances displayed by the year received, with the most recent year first.

From this tab you can:

- ← View and Print a Receipt of a Selected Historical Remittance
- ← Access an Excel Listing of Employees Associated with a Selected Remittance

- **Employer Profile:** When you select the Employer Profile Tab you will see a list of your employees who have been invited to EmployerXG and their status in XG. To edit/manage an individual contact, click Edit (underneath the “Employer Contacts” heading). The First Name, Last Name and E-mail Address are required fields. The option to send an EmployerXG invite is located here as well.

From the Employer Profile Tab you can:

- ← Add, Update and Delete Employer Contact Information
- ← Set Your Preferences
- ← Add, Update and Delete Employer Bank Account Information

- **Personal Profile:** Information about passwords, usernames and security questions are maintained under the Personal Profile Tab.

From this tab you can:

- ← Add or Update Your Personal Contact Information
- ← Change Your Password and Security Questions/Answers

TAB 1: Home

Your Remittances Due				
Due Date	Status	Past Due	Description	
11/15/2016	Due	!	8627-SCMEA - MEA AGREEMENT JM	
10/15/2016	Due	!	8627-SCMEA - MEA AGREEMENT JM	
09/15/2016	Due	!	8627-SCMEA - MEA AGREEMENT JM	
08/15/2016	Due	!	8627-SCMEA - MEA AGREEMENT JM	

TAB 2: History

Remittance Summary	
Year: 2016	
Reference Number	Description
BS1321	8627-SCMEA - MEA AGREEMENT JM
BS1318	8627-SCMEA - MEA AGREEMENT JM

TAB 3: Employer Profile

**Primary Address** ☒

533 S FREMONT AVE  
LOS ANGELES, CA 90071-1712  
USA

**Employer Contacts**

First Name	Last Name	Generation
JOE	OWNER	

TAB 4: Personal Profile

**Contact Information**

\* - Required

First Name\*: JOE

Last Name\*: OWNER

Generation: Select a Generation...

Title: Select a Title...

Contact Type: OWNER

E-mail\*: joeowner@gmail.com

**User Information**

\* - Required

Username\*: joeowner88

Old Password:

New Password:

Confirm Password:

Challenge Question 1\*: What was the name of your first pet? [X] [v]

Challenge Answer 1\*: Rocky

# MANUAL ENTRY FOR ONLINE REMITTANCE REPORTING: A STEP-BY-STEP GUIDE

1. Open the existing Remittance that is “Due” from the Home Screen. There are two ways to open an existing Remittance. You can click on the “Open” icon or double-click on the existing Remittance.
2. Begin by entering the Employee ID (SSN). Validate existing employees with Last Name and Date of Birth (validation is only required the first time the employee is entered). If you are inputting a new participant, you will need to add them to the system. See Step 6.
3. Select the job class. You can use the “Tab” button to move through the page.
4. Enter the hours in each required quantity field and the system will automatically calculate the amount due based on the data you entered.
5. When entry of employees and hours is complete, select the “Add to Cart” button at the bottom of the screen. You will have the option to proceed to cart or to complete additional remittance(s) before payment by returning to the Home Tab.
6. Adding a new employee: You will need to enter a Social Security Number, First Name, Last Name and Date of Birth. You are not required to, but you can also enter an Address, E-Mail and Phone Number.

Group: CARPENTERS  
Description: 8627-SCMEA - MEA AGREEMENT JM

Employee Details

Employee ID: [ ] Name: [ ] JobCls: [ ] ESCAP: [ ]

Validate Employee

Last Name\*: [ ]

Birth Date\*: [ ]

Validate Cancel

Group: CARPENTERS  
Description: 8627-SCMEA - MEA AGREEMENT JM

Employee Details

Employee ID: [ ] Name: [ ] JobCls: [ ] ESCAP: [ ] SOCAP: [ ] ALLHRS: [ ]

JobCls: [ ]

APPR 4  
APPR 3  
APPR 6  
APPR 7  
APPR 8  
APPR 9  
APPR 10  
JOURNEYMAN  
APPR 1  
APPR 2  
APPR 3  
PRE-APPRENTICE

Page 1 of 1  
Displaying 1 - 1 of 1

Remittance Summary

Summary by: Fund

Fund: Southwest Carpenters H&W Fund

Group: CARPENTERS  
Description: 8627-SCMEA - MEA AGREEMENT JM  
Work Period: 201607 07/0

Employee Details

Employee ID	Name	JobCls	ESCAP	SOCAP	ALLHRS	Amount Due	Status
11111111	BAYS TEST MEMBER	JOURNEYMAN	200	200	113	\$5,000.00	
						\$0.00	

Remittance Summary

Fund	Amount Due	Amount Paid
Southwest Carpenters H&W Fund	\$500.00	
SW CARPENTERS MEDICAL TRUST	\$500.00	
Southwest Carpenters Insurance	\$500.00	
Supplemental dues	\$113.00	
Southwest Carpenters Training	\$50.00	
Totals	\$1,763.00	

Mark Delete Add to Cart Export

Return Home to complete additional remittance(s)  
Proceed to Cart

Create Employee

Employee ID: [ ] Phone Number: [ ]

Birth Date\*: [ ]

Local: [ ]

Hire Date: [ ]

Country Code: [ ]

Street Address 1: [ ]

Street Address 2: [ ]

City: [ ]

State: [ ]

Zip Code: [ ]

Email Address: [ ]

Title: [ ]

Gender: [ ]

Generation: [ ]

Save Cancel



PAYING A REMITTANCE

- 1. Once your Remittances have been entered, proceed to cart to complete your Remittance payment. Choose “Payment Method” (Check or EFT). If banking information is enabled on the Employer Profile Tab, the field will default to EFT.
- 2. Pick the “Payment Date.” For checks, it should be the current date. For Electronic Fund Transfers (EFT), you can choose the date on which you want the funds withdrawn.
- 3. Select the Remittance(s) you want to pay.
- 4. Click “Apply Payment.”

Reference Number	Work Period	Description	Employer Number	Due Date	Payment Amount
871868	201707 07/01/2017 - 07/31/2017	7930-SCHLA - SN MIA	10131	08/15/2017	DUE \$1,506.70
891364	201705 05/01/2017 - 05/31/2017	8059-SCHLA - COMMERCIAL	10131		DUE \$1,742.00

Reference Number	Work Period	Payroll Dates	Payment Amount
871868	201707	07/01/2017 - 07/31/2017	\$1,506.70
891364	201705	05/01/2017 - 05/31/2017	\$1,742.00

- 5. Finish your payment by clicking “OK.”

Remittance Count: 1  
Remittance Amount Due: \$5,112.28  
Damage Amount Due: \$501.57  
Total Amount Due: \$5,112.28  
Total Amount Paid: \$5,112.28  
Payment Date: 09/07/2017  
Payment Method: Check

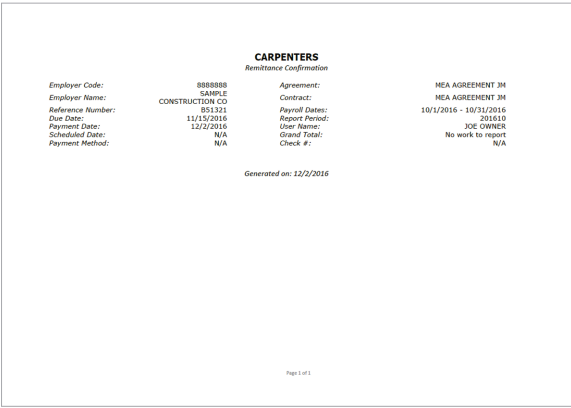
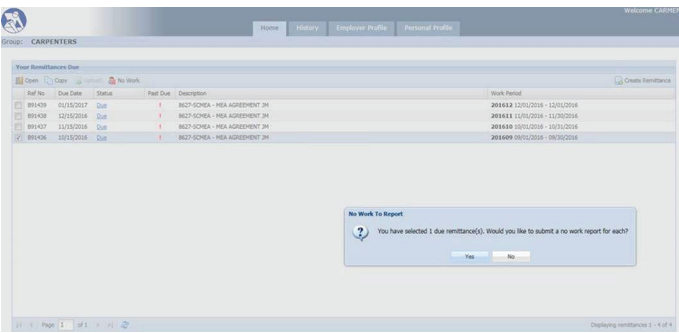
Press OK to confirm payment or Cancel to review your work.  
After confirming you will be able to print a detailed payment receipt from the History tab.

- 6. To retrieve a confirmation, visit the History Tab. If paying by check, submit a copy of the Remittance Confirmation with your check. If paying by EFT, no further documentation is required; however a receipt can be printed for your records by visiting the History Tab.

CARPENTERS					
Remittance Confirmation					
Employer Code:	888888	Agreement:	MEA AGREEMENT JM		
Employer Name:	SAMPLE	Contract:	MEA AGREEMENT JM		
Reference Number:	851319	Payroll Dates:	7/1/2016 - 7/31/2016		
Due Date:	8/15/2016	Report Period:	201607		
Payment Date:	12/2/2016	User Name:	JOE OWENS		
Scheduled Date:	12/2/2016	Grand Total:	\$6,719.14		
Payment Method:	Check	Check #:	123456		
Fund	Amount Due	Damage Due	Total Due	Amount Paid	
Southwest Carpenters HBW Fund	2145.00	256.15	2401.15	2401.15	
Southwest Carpenters Pension	882.00	105.33	987.33	987.33	
Southwest Carpenters Vacation	1082.83	129.31	1212.14	1212.14	
Supplemental Dues	517.05	61.75	578.80	578.80	
Southwest Carpenters Training	155.00	18.51	173.51	173.51	
Hillwright's Industry Promotion	12.50	0.00	12.50	12.50	
Hillwright's Drug Testing Fund	35.00	0.00	35.00	35.00	
Hillwright's Deferred Savings	1449.00	137.41	1586.41	1586.41	
Hillwright's Employers Assoc.	42.50	0.00	42.50	42.50	
<b>Total:</b>	<b>\$6,010.88</b>	<b>\$708.26</b>	<b>\$6,719.14</b>	<b>\$6,719.14</b>	
Generated on: 12/2/2016					
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# NO WORK REPORT\*

- 1. Click the Remittance that you want to edit.
- 2. Click on “No Work.”
- 3. The “No Work” icon will be disabled for Remittances that are In Progress. If the Remittance shows “In Progress,” open the Remittance and choose the “Delete” option. This will make the Remittance available to mark “No Work.”
- 4. Click “Yes.”
- 5. If needed, a confirmation can be printed from the History Tab.



\* Employers must file a Remittance Report each month, even in months when no Carpenters were employed. Failure to file a Remittance Report for an active agreement may result in a delinquency.

# QUESTIONS

If you have any questions about the information in this brochure or about the remittance process, please contact the Administrative Office at:

- Administrative Office** 533 South Fremont Avenue  
Los Angeles, California 90071-1706  
Phone: (213) 386-8590 | Toll-Free: (800) 293-1370
- Post Office Box** P.O. Box 17969  
Los Angeles, California 90017-0969
- Website** [carpenterssw.org](http://carpenterssw.org)
- Remittance Portal** [employer.gobasys.com/CSACv2/login/login.aspx](http://employer.gobasys.com/CSACv2/login/login.aspx)
- E-Mail** [employerservices@carpenterssw.org](mailto:employerservices@carpenterssw.org)

You can also refer to the EmployerXG Quick Start Guide located on the Employer Tab of the Carpenters Southwest Administrative Corporation website at [www.carpenterssw.org](http://www.carpenterssw.org).



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SOUTHWEST  
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