



NEW ENGLAND CARPENTERS BENEFIT FUNDS

Employer Self Service FAQ's v1.1

Q.) When will the system upgrade go into Production?

- *Effective 4/2/2012*

Q.) Are the user names and passwords changing?

- *No, continue to use your user name and password. When logging in for the first time, you will be prompted to enter a security question. Each subsequent time after logging in, you will only enter your user name and password*

Q.) When the upgraded system goes live, will employees exist in the work report or do the employees need to be added?

- *When the new system goes live, you will be able to see all the existing employees from prior reports*

Q.) When the upgrade goes into production, will the billing information be transferred ?

- *Yes*

Q.) Will the work reports be converted over in time for the April 2nd go live?

- *Yes*

Q.) If there is a credit balance, can that be used toward the following week?

- *Yes*

Q.) Are deposits still going to First Trade Union Bank as normal?

Yes

Q.) Is there a list of Locations?

- *Yes. There will be a Jurisdiction Listing on the NECBF website (www.carpentersfund.org) and you can also view the New England Regional Council of Carpenters website (www.nercc.org)*

Q.) Will there be a list of job category's and agreement names?

- *Yes. There will be a list of Job Category and Agreement names on the NECBF website (www.carpentersfund.org)*

Q.) Will there be a manual and/or tutorial to reference in the future?

- *Yes. The Employer Self Service Manual will be available on the NECBF website under Employer Benefits*

Work Reports:

Q.) Is the start date on the work report the start date of the payroll cycle?

- *Yes*

Q.) Can a Work Report be submitted in a week in advance?

- *Yes*

Q.) How do you add a member who has never been reported to the Funds?

- *Contact NECBF*

Q.) Where do we get the UBC number for members?

- *If the member is in the system, try looking up the member by name or SSN*
- *If the member does not exist in the system, contact NECBF*

Q.) Is the Import process the only way to generate a Work Report?

- *No. To generate a Work Report Online using the grid feature that currently exists, select Work Report under Menu, Gen. Report then select Generate Work Report Online*

Q.) Can multiple agreements be added to one import file?

- *Yes*

Q.) How do you print a Work Report?

- *Select Work Reports > Select History > Under Actions, select View on the report you are looking for. Under Work History at the top tool bar you will see ADD, Delete, on the far right there is a Print & Export button*

Q.) Can the Report be printed prior to submitting?

- *Yes. In the Work Report under Work History, the tool bar has a print button*

Q.) Can an import be done daily or should it be weekly?

- *Weekly is preferred, remember that once a file is imported, it goes into prebill status, thus making any changes can be difficult*
- *If you choose to import a file daily, note that the prior members on the file will need to be stripped off the file or the hrs need to be zero'd out. Otherwise, the hrs will double for the members that were previously imported*

Q.) How do you input information if an employee works Eastern area and Boston area?

- *If you are importing a file, add the member under both agreements*
- *If you generate an online report, add the member under each agreement*

Q.) What if a member is working in the Eastern Area but you would like to give the member the Boston Area Benefit package?

- *Generate a Boston Agreement Work Report and select the Eastern Area Local where the work was performed*

Q.) If choosing to do the online version, is it similar to how its currently reporting?

- *Yes. Except UBC numbers will display instead of SSN and Local will display instead of city & town*

Q.) Can a prior file be used or does a file have to be exported each time in order to import?

- *You can use the a prior file , however be sure the Start & Stop dates are correct along with the hours and locals for each member and that all members are included*

NOTE: When exporting a file, it will reflect all members that were on the most recently release (paid)report

Q.) Can the date columns be formatted so that the dates don't have to be changed each time?

- *Unfortunately no. The date's have to be a 8 digit numeric (MMDDYYYY)*

Q.) When importing a file, if laying off a member, can the lay off column be set to Y?

- *If a member should be listed as Layoff, the import process will not work. Please Generate an Online Work Report*

Q.) When importing a file, can a member have MOF (Market Opportunity Fund) set to Y?

- *If a member should have MOF selected, the import process will not work. Please Generate an Online Work Report*

Q.) What if we don't have excel? How can a Work Report be imported?

- *Generate a Report online using the existing work report "Grid Feature".*

Q.) If the file was imported and did not import successfully, after looking at the errors, can corrections be made to the original file?

- *Yes. Be sure to double check the dates on the file as, it sometimes will revert's to less than 8 digits (MMDDYYYY)*

Q.) Can you edit a report in prebill status?

- *An Adjustment report will need to be created for a missing member or to add hours to a member or contact NECBF*
- *To subtract hours, contact NECBF*
- *If there is a need to delete the work report in its entirety, contact NECBF*

Q.) If a mistake is made after importing a file & it's in prebill, what do you do?

- *Contact NECBF and a Collections Representative can make the appropriate change to the prebill work report*

Q.) What if too many hours were submitted for a member on a work report?

- *If the work report is in prebill status, changes cannot be made unless you contact NECBF to have the hours adjusted*
- *If you would like to remove hours from a member it can only be done by contacting NECBF*

Q.) Can you search for a member by SSN?

- *Yes. However when the member populates on the work report the UBC number will be viewable instead of the SSN*

Q.) When generating an Online report, does a separate Work report have to be created?

- *Yes, each agreement requires its own separate work report*

Q.) After generating a Work Report, while the work report is still in initial status, can edits be made to the work report without making an adjustment report?

- *Edits can be made if the work report you created was generated online*
- *If the work report was imported, then the work report will automatically go into prebill status*
- *If the work report was imported, either an adjustment needs to be created or contact NECBF*

Q.) Can you change a date due to a rate change?

- *Yes. You would report the member(s) by having two lines on the work report for each applicable end date to ensure the proper benefit rates*

Q.) How do you view what's applied to each fund when a work report has been released?

- *Select Work Reports > Select History > Under Actions, select View on the report you are looking for. When the report is open, under Criteria > Select View Summary or Payment Details on the lower right*

Q.) Are the stamps going to change using the UBC numbers vs. the SSN?

- *No. The last 4 digit of the SSN's will display on the stamp*

Q.) Is there an indication as to which stamps have been printed and which ones are waiting to be printed?

- *Yes, under Status it will say Printed or Queued*
- *When printing the Stamps, be sure to use the print button in the upper right. This is what changes the status from Queued to Printed*