


ESS User Guide

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Welcome

The purpose of this informational tool is to provide quick and useful information on the usage of the Employer Self Service (ESS) system.

Important Reminders:

Every time you log into ESS remember to check the News tab for general messages and reminders from 32BJ. Also, check the Alert section which contains messages from 32BJ that are specific to your username and triggered by the conditions of your accounts.

Your registered email address is the Funds' primary means of communication regarding important changes to your account. It's imperative to keep the email address current.

Visit the 32BJ website at the following link for additional materials and answers to frequently asked questions: <https://www.32bjfundsemployer.org/en-us/faq.aspx>

If you have any questions regarding your access to the ESS, contact your company's Security Administrator or your Funds Representative.

Accessing the Employer Self Service (ESS) Portal

- To log into ESS, go to the 32BJ website: <https://32bjuat4ess.v3locity.com>
- Enter your username and password in the appropriate fields.
- Click Log In. Username and passwords are case sensitive

You will have three attempts to successfully log in before you are locked out of the ESS system. If you are locked, another security administrator can unlock you or an Employer Services Representative.

First Time Log In

- After you log in, the system will prompt you to reset your password. Type old password in the Old Password field. Type new password in the New Password and Confirm New Password fields. Click Save to update password settings.
- You can now click on the Home button to go to the main page.

- If the username is linked to more than one employer select the Employer, you wish to view. Choose the appropriate employer and click Select. If the username is linked to only one employer the ESS Home page automatically displays.

Two Factor Authentication

Link: [2FA User Guide: How to Navigate Two Factor Authentication](#)

When you log into ESS, you will receive verification code to your email, for security purposes. To disable this feature please see below:

- Click on **Profile** on the top right corner
- Then click on **More**, right next to login history. Afterwards click on **Update Two Factor Authentication**.
- If you would like to disable the Two Factor Authentication, Select **No**.
- If you would like to enable the Two Factor Authentication, Select **Yes**. Check **Only for new device**, for new devices.
- To use the App-Based Two Factor Authentication, Select **Yes**. Then Click **Set Up**.

If you would like to disable this feature completely, Select **No**. Once completed, click Confirm.

Home

There are six sections to the home page.

- **Profile:** displays as well as two links:
 - **Profile:** Allows you to Update your password, contact info and two factor authentication. This will also display the last time you logged in.
- **Shortcut Menu:** Provides quick access to common tabs.
- **Navigation Menu:** Tabs that appear in this section depend on the security access level of each user. These tabs provide access to different tasks and information in the system.
- **Alerts:** This section displays general messages and reminders from 32BJ.
- **Notifications:** Contains messages from 32BJ that are specific to your username and triggered by the conditions of your accounts.
- **Accounts:** Displays a list of accounts you have access to. Clicking the Account hyperlink will take you to that account detail page.

In addition to News and Alerts, we notify employers about delinquency invoices

according to the following criteria:

Criteria Basis. 4 Notices (1 Letter format, 3 Email formats.)

- **5 Day Reminder Notice** – Email sent to Employer 5 days before our due date on 20th of current invoice as a reminder that pending invoice for the month are due.
- **5 Day Late Payment Notice (BCI)** – Email sent to Employer when they have any open BCI invoice with a balance due pending payment that's late from 5 to 35 days. (Example: Today is 10/23/2024 and due date for current invoice is 10/20/2024 but employer still has invoice pending due on 9/20/2024. Invoice due on 9/20/2024 will be 33 days late from today, therefore an email will be generated to Employer as a reminder that payment is due.)
- **5 Day Late Payment Notice (401K)** – Email sent to Employer when they have any RELEASED 401K invoice with balance due pending payment that's late from 5 to 35 days. (Since 401K invoices are weekly, this notice serves as a reminder to employers as they might have forgotten to make payment for the 401K transactions.)
- **Late Payment Letter** - If the employer ignores all our email and continues to keep the transactions unpaid and discrepant, a batch will generate a late payment letter for any transactions that are over 35 days late. Depending on when the batch is processed, the letter will include invoices that are currently due.

Roster

In this section you will be able to see your employee rosters which include the Participant ID number, last four digits of SSN, name, status, hire date, termination date, termination reason, job type, job class, current hourly wage rate, account number, account name, work location number, work location name, contract name, employer number, employer name, pension experience date and profit-sharing experience date.

Processing a New Hire:

Select the Process New Hire at the top right (can also be performed from the Shortcuts Menu): Select specific account the employee will be hired under. Select next. Enter the employees' SSN and DOB, then click Search. A message displays, "This member does not exist in our records. Please refine your search or click 'Add new Member' if you wish to create a new Participant." Click add new member link to create a new participant record. Complete the required fields, then select Next. Confirm after reviewing.

Viewing Member Details:

Click on the **Person ID** hyperlink to view employee Roster Information, Member Demographics and EOY Wages.

Modifying an Existing Roster Record:

Click on **Roster Change** to perform the following:

Job Change:

Click on **Roster Change** and a small window will appear. From the menu select **Job Change** then click **Next**. Enter the new job information: start date (*Use the 1st of the current month if the change is happening before the 20th. Any changes after the 20th you should use the 1st of the following month*), job type, job class (*you will only be able to view job classes that pertain to your contract*) and hourly wage rate. Then click **Next**. Review the changes then select **Confirm**.

Terminate:

Click on **Roster Change** and a small window will appear. Select **Terminate**, click **Next**. Enter the termination date and reason, click **Next**. Review and then select **Confirm**.

Transfer:

Click on **Roster Change** and a small window will appear. Select **Transfer**, and then select **Next**. Select the specific account, then select **Next**. Enter the effective date, job type and job class, then select **Next**. Review and then select **Confirm**.

New Leave/End Leave:

Click on **Roster Change** and a small window will appear. Select **New Leave/End Leave**, then click **Next**. From the drop-down menu, Select the Leave Reason (*The available leave reasons are: Short Term Disability, Leave of Absence, Brigade, Military Leave, Workers Comp, Seasonal Leave, Leave with Health and Family Medical Leave*). Enter the Leave Start and Stop date then click **Next**. Review and then select **Confirm**.

New Wage Rate:

Click on **Roster Change** and a small window will appear. Select **New Wage Rate** and click **Next**. Enter **New Wage Rate** Start and Stop Date (*stop date is not mandatory*). Enter the **New Wage Rate** and select **Next**. Review and then select **Confirm**.

Modify Wage Rate:

Click on **Roster Change** and a small window will appear. Select **Modify Wage Rate** and click **Next**. Enter the Wage Rate Start Date, Stop Date and New Wage Rate (*Stop date is not mandatory*). Review and then select **Confirm**.

Modify/Delete Leave:

Click on Roster Change and a small window will appear. Select **Modify/Delete Leave** and click Next. To delete a leave, select yes from the drop-down menu and select Next. Review and then select Confirm.

Invoices

In this section you will be able to see a list of invoices that are in 'Pending' status. It means that the invoices have not been submitted to the fund office and they are available for editing. The different invoice types you will see are: **Originals, Adjustments and Rebill invoices**. You can also delete, release and create both Original and Adjustment invoices.

Benefit Contribution Invoice (BCI): A monthly in arrears bill for employer benefit fund contributions (Health, Pension, Training, Legal, and Profit Sharing) negotiated in your collective bargaining or participation agreement. BCI Invoices are due on the 20th of the following month. The invoice details are calculated based on your roster and other rules defined in your agreement or plan. In a limited set of agreements, the employer must report contributable hours or specific dollar amounts.

401k: If your company participates in the Supplemental Retirement Saving Plan and you have employees that elected to defer wages for 401k then, the Employer is responsible for creating and submitting those invoices to ESS. 401k invoices are created weekly or biweekly depending on your payroll cycle. All 401k invoices are due 7 days after the payroll pay date.

Union Dues and Initiation Fees (UDI): In accordance with the SEIU Local 32BJ Constitution and Bylaws, a condition of membership is the monthly payment of dues in an amount specified in the Constitution. The amount of members' dues obligation varies in accordance with their hourly wage, number of days of employment per week, and health benefit coverage. Most collective bargaining agreements include a provision that covered employees pay Union dues. The provision is referred to as a Union Security clause. Employees covered by a Union Security Clause may refrain from joining the Union and may make a monthly payment that is less than the dues rate that would apply if they were members of the Union. This reduced payment is known as an "agency fee payment." Employers are required to deduct dues or agency fee payments from workers who have signed dues check off authorization form. In general Dues are due by the 20th of each month unless the language in the CBA states otherwise.

American Dream Fund (ADF): Otherwise known as the American Dream Fund. The SEIU 32BJ ADF is a federal political action committee (PAC) that is registered with the Federal Elections Commission (FEC). Workers who have signed the ADF Check off authorization form have elected to contribute voluntary contributions to Local 32BJ. The elected amounts are weekly based. The union's ADF invoices in ESS are calculated to bill based on that weekly amount based on the number of Sundays in a month. Please note that if the amount billed does not match your deducted amount, the invoices can be edited in the ADF deducted column to reflect the amount you deducted for payment. In general, ADF is due by the 20th of each month unless the language in your CBA states otherwise

Creating Invoices:

- Click on the **Create Invoice** button on the top right corner. A small window will appear.
- Select the specific Account from the list below (*To create invoices for all accounts, leave the filter as All*). Select **Next**.
- From the drop-down menu select the **invoice type**, then select **Next**.
- Mark the checkbox for the invoice to create and enter the Report Period Start Date. Select **Next**.
- Review and select **Confirm**.

Creating Adjustment Invoices:

- Click on the **Create Adjustment** button, on the top right corner. A small window will appear.

- Select the specific Account from the list below (To create invoices for all accounts, leave the filter as All). Select **Next**.
- From the drop-down menu select the **invoice type**, then select **Next**.
- Modify the start and stop date to reflect the reporting period for the adjustment you are creating. Adjustment dates should correspond with the original invoice.
- Review and select **Confirm**.
- Click on the Gen Adjustment button to create the adjustment invoice. A message will appear advising **The adjustment you requested was successfully generated**. Pending Adjustment should now be displayed under the invoices tab.
- By clicking on the Transaction number, then click **Edit Adjustment** to add members to the adjustment invoice.

Please note that once an invoice is released you are agreeing with the charges on that Specific transactions and changes to the invoice can no longer be made. You will now see your released invoices in the Payment Processing tab.

Editing BCI

- Click **Transaction number** on the pending transaction. Here you can view the details and charges for each member.
- If you have hours or wages to report, click **Edit** and add all hours, contributable hours and wages to the open fields. Please note if the account is hourly, **all hours, and contributable hours**, must be edited. If the account is monthly, **all hours**, sections can be left blank.
- Click **Save** and “close once completed. This will take you back to the invoice details screen. To return to the invoices tab, Click **Invoices**.
- After you reviewed and edited the invoice, mark the checkbox for the invoices you are ready to pay. Click **Release**. Next click **Confirm**.

Editing 401k

- Click on the transaction number on the pending transaction. Here you can view the participant records for the selected 401k invoice.
- On the top right corner, you can Add Payroll Pay Date. Once completed click Save.
- Click **Edit** and enter the 401k amounts for each participating member.
- On the top right corner, you can select **Add Member**, a new roster line will appear a member can be added to the 401k invoice.

- Click Save once all changes have been completed. You can close the invoice on the top right corner.

After you reviewed and edited the invoice, ready to pay. Click **Release**, on the top right corner. Then select **Confirm**.

Editing UDI

- Click on the transaction number on the pending transaction. Here you can view the details and charges for each member.
- If the invoice Due Amount does not match the amount you are remitting, the Due Amount can be updated.
- Click on Edit, under the Dues Deducted column, populate the amount that was deducted from the member(s) to match your deductions.
- After you have reviewed and edited the invoice, you will click Save and Close.
- Click on the Invoices tab to go back to your invoices.
- Mark the checkbox for the invoices you are ready to pay, click on Release Selected.

Please contact your Union Dues representative to verify the discrepancies on the billed amount.

Editing ADF

- Click on the **Transaction number** on the pending transaction. Here you can view the details and charges for each member.
- If the invoice Due Amount does not match the amount you are remitting, the Due Amount can be updated.
- Click on **Edit**, under the ADF Deducted column, populate the amount that was deducted from the member(s) to match your deductions.
- After you have reviewed and edited the invoice, you will click **Save and Close**.
- Click on the **Invoices tab** to go back to your invoices.
- Mark the checkbox for the invoices you are ready to pay, click on **Release Selected**.

Payment Processing

In this section you will be able to see a list of released invoices with an open balance that needs to be paid or allocated. You can also view the Transaction details and any prior monetary allocations. At this point no changes can be made to an invoice. If any discrepancies or issues are noticed after the invoice is ready for payment, please reach out to Employer Relations for assistance. The different invoice types you will see in

This section are: Released Originals, Adjustments and Rebill invoices.

- To apply a payment/allocation to the invoice, select one or many invoices of the same invoice type and click the **Make Payment** button.
- Mark, the checkbox for the invoices you are ready to pay. Click **Next**. The invoice details will appear then click **Confirm**.
- A pop up will appear advising you will be taken to a Secure Payment Gateway. Click **Yes** to continue.
- You will be taken to the Paymentus website where you will be able to complete your payment and receive your confirmation number. **Please make sure not to click your browser back button**

After you have completed your payment successfully and have logged out of Paymentus you will be taken to the Transactions tab in ESS.

Transactions

In this section you will be able to view all invoices (Pending, released and paid Originals, Adjustments, Rebills and interest). You can filter this page using a variety of parameters. You can also view the Allocation Details of an individual transaction and also Participant Details. If you wish to pay a Released Invoice you can also do so from this section.

Transaction Parameters:

- **Account Search:** You will be able to search account(s)
- **Invoice & Trans Description:** You will be able to search for a Transaction Description
- **Transaction Type:** From the drop-down menu you can view Original, Adjustment, Rebill, Interest or all transaction types.
- **Activity Date:** From the drop-down menu you can view invoices from All of Time to specific date ranges.
- **Status:** From the drop-down menu you can select to view all, opened or closed transaction statuses.

By selecting the filter on the top right corner, you will also be able to conduct an Account Search. Filter for Transaction Type, Reporting Period Start Date, Reporting Period Stop Date, Status, Status, Invoice Status, Original Amount, Total Remaining Due, Invoice Due Date, Activity Date, etc.

Transaction Types:

- **Original** is the primary invoice which is either automatically or manually created in ESS.
- **Adjustment** is an additional invoice, secondary to the original, which can be created manually or be triggered automatically by a roster change in ESS.
- **Rebill** is an additional invoice, secondary to the original, which is only triggered by changes in the contracted Rules and entered Leaves.
- **Interest** occurs if an Invoice is not paid by the due date. If an Invoice is in an “ACH Payment Bounced” status after the due date of the Invoice. If an Adjustment Invoice (created for an amount due to the Funds for retro-active reporting period) results in a net positive amount due to the Funds beyond the due date of the original Invoice Reporting Period.
- **Credits** can occur when a timely roster change is made after an Original invoice is paid.
- **Payment** can be found in ESS. Each time a payment is made, ESS assigns a Transaction number to it. This number will allow you to view all Invoices paid under those transactions.

Opened Transactions

When filtering for “Open” status invoices, you will see all pending Originals, Adjustments, Rebills, Interest and Credits.

- By clicking on the transaction number, you will be able to see the **Activity Date, Inserted Date, Transaction Type** and **Payment Confirmation**.
- By checking the box, you will then Select **Make a Payment and** will be taken to Paymentus.

Applying Credits

- Select the released Credit transaction from the list shown and then Click **Apply Credit**.
- Select specific account or Select all Accounts, click **Next**. If you select a specific account, from the drop-down select the account where the invoices is located under, then click **Next**.
- After selecting the Invoice, then click **Confirm**

- Click **Apply Credit**. The paid amount of the Debit Transaction updates, and the remaining Balance of the Credit Transaction updates. You will receive a green banner stating, "You have successfully applied Credit."

Closed Transactions

When filtering for **Closed** status invoices, you will see all paid Originals, Adjustments, Rebills, Interest and Credits.

- By clicking on the transaction number on an Original, Adjustment and Rebill You will be able to see the Activity Date, Inserted Date, and Transaction Type
- When clicking on the transaction number on an Interest charge, you will be able to see the Activity Date, Inserted Date, and Transaction Type
- When clicking on the transaction number on a payment transaction, you will be able to see the Activity Date, Inserted Date, Transaction Type and Payment Confirmation.

Uploaded Files

In this tab you can view all uploaded files by users in your organization. The upload file tab is used to import hours and wages for Employers with a large number of members and/or to report multiple contribution periods at once. The different upload files that can be processed are: BCI, 401k, Gross Wages EOY, UDI and ADF. Please be sure to visit our Employer website for file formatting templates. Please make sure the file is a csv comma delimited. (Employer File Import)

How to upload a file:

- Select **Upload a File** on the top right corner.
- Select the File Type and then select **Browse** to upload the file. Next, enter the file's description and click **Next**.
- Enter the Employer ID. Managing agents must enter the Employer ID , for the employer they are importing the file under. Then, click **Next**.
- Click on **Process** and the file will start processing. A green banner will display, and the status will show when the file is being processed.
- Once the file is uploaded, the Import Status will say **Completed**.

- If the file is processed **Successfully** you can move onto the Invoices tab to review your Invoice.
- Please click on the **View Errors button** to view the error details. A pop up will appear and you will be able to see the error messages for that specific sequence number. The most common error types are:
 - Participant XXXXXXX was not active during Reporting period
 - All Hours cannot be negative for the Reporting Period including Adjustments
 - Contributable Hours cannot be negative for the Reporting Period including Adjustments
 - All Hours Cannot be '0'
 - Invalid input syntax for type numeric
 - Total Wages cannot be negative for the Reporting Period including Adjustments.
 - Participant XXXXXXX has multiple roster records for the same Account XXXXX for the same Reporting Period. BCI has been applied to Account XXXXX where SSN has an earlier Hire Date.
 - 8) Participant XXXXXXX is active for multiple Accounts for the same Employer ID XXXXX. BCI has been allocated for Account ID XXXXXX with the earlier hire date.
 - Contributable Hours cannot be greater than All Hours for the Reporting Period
 - Participant XXXX has multiple records in the import file for the same employer XXXXX and account. These records have been consolidated.
 - BCI Invoice cannot be generated for a future date.
- After reviewing your errors, you can go back into the import details and correct the sequence number affected. Click **Save**. Hit the **Process** button, then the screen will then refresh. Now you will see that the sequence number is processed successfully. You can now move onto the Invoices tab to review your Invoice
- If the file was **Processed with Exceptions**, the process button will disappear. You can click on the Import ID to see what exceptions generated. Select **View Errors**

on the top right to view errors. Once errors have been fixed, the file can be re-uploaded.

- If the file was **Processed with Errors**, you must click on the Import ID. Next Click, **View Errors** on the top right to view errors. Once errors have been fixed, the file can be re-uploaded.

Employer Administration:

This page allows you to add, delete, and update contacts. If you are a Security Administrator, you can also reset the password to an existing User in this section.

Creating a new ESS User under an Employer level:

- Click **Add User** in the top right corner.
- Enter the first and last name, then click Next. To create a new user, click **Continue Adding New User**. *Make sure no apostrophes are included in the username, first or last.*
- Complete the New User information by entering the contact role, phone number, address and email. Select a Security Role click **Save**.
- A new Username has been generated. Once reviewed, click Complete.
- By Clicking on the ESS User you will be able to **Edit User details, Contact Info and Update Security Role/Assignments**. Password can also be reset here as well.

Creating a new ESS User under an Account level:

- Click **Add User** in the top right corner.
- Enter the first and last name, then click Next. To create a new user, click **Continue Adding New User**.
- Complete the New User information by entering the contact role, phone number, address and email. From the drop-down menu Select **Grant Specific Access** and then Select a Security Role.
- Select the Account the User will have access too, click **Save**
- A new Username has been generated. Once reviewed, click **Complete**.
- An email will be sent to the user to complete the registration process.

How to Edit a Contact under an Employer/Account level:

- Click **on** the ESS Username. Select Edit if you would like to Edit User Details, then click Save. Select Edit if you would like to Edit Contact Info then click Save.
- Click **Update Security Role and Assignments**, and you can update a user's Security Role and Employer/Account access, afterwards click **next**. User access can also be revoked by selecting **Revoke All Access**. Once completed, click **next again**. Review and click **Complete**.

How to Delete a Contact under an Employer/Account level:

- Click on the Employer Information Tab.
- Click **Delete** next to the ESS User you would like to delete.
- Message appears advising, **Are you sure want to Delete?** Click **Yes** to continue.
- You will now see that the user is no longer listed as a contact, and you will return to the main tab.
- If a User is also a contact, the system will not allow you to delete the user. A pop-up will appear stating *Employer contact is also an employer user. Cannot be deleted*. However, User can be revoked in the Employer Administration tab.

How to reset an existing Users password for ESS:

Only Employer Administrators have the capability to reset passwords for Users.

- Click on **Reset Password** on the top right corner and enter your new password with the password requirements. Then, click Save.

Link: [How to reset your password](#)

Accounts

In this tab you can view the Account Information, Work Location Address and Contacts for the selected account. You can also add, edit, and delete contacts.

How to Add a contact:

- To add a contact, click on the account number.
- Then, click on **Add Contact**.
Search the Username of the individual. If the user is not found, Click on **Continue Adding a New Contact**.
- Select role from the drop-down, **Individual- Other Person**.

- Complete the contact information. Click **next** and **confirm**.

How to Edit and Delete a Contact:

- Click the contact's name and the Contact Details will display contact information and phone and email.
- To Update contact information, click on **Edit**. Once completed click, **Save**.
- To delete a contact click **Delete** next to the contact's name. You can also delete a contact, by clicking the contact's name and then clicking Delete Contact on the top right corner.
- Message appears advising **Are you sure you want to delete?** Click **Yes**.
- You will now see that the contact is no longer listed, and you will be returned to the main tab.

Employer Information

In this section you can view and edit Employer Demographics, Address and Contact Information. You can also add, edit and delete contacts, please refer to the Employer Administration section for the steps.

- Click **Edit**.
- Update Tax ID, then click **Save**.

Edit Address:

- Click **Edit**.
- Update the Business Address and Contact details.
- Click **Save** and then **Confirm**.

Help and Support:

In this section you will find some helpful tips that will assist you with navigating through the ESS system, FAQs and how to Contact Us.

Helpful Links

- You will be able to visit the 32BJ Union Site, and Employer Website.
- Email Employer Relations and the Union Employer Services.

Contact Us:

- You can find the contact information for the **32BJ Dues Department** and their hours of operation. Please contact the Union Dues Department for any Union Dues or ADF questions.
- You can find the contact information for the **32BJ Benefit Funds Employer Services** and their hours of operations. Please contact Employer Services for any BCI or 401k inquiry.

FAQS:

Here you will find helpful tips and commonly asked questions regarding ESS, and how to resolve any issues you may run into. For further assistance please contact employerrelations@32bjfunds.com or **212-388-3354**.

Reports:

In this section of ESS you can access the reports module to run predefined reports in the ESS portal. The different reports that can be ran are: ESS Account Status Change Report, Employer ACA 1095C Detail Report, Invoice Details 32BJ Funds Report, Invoice Details 32BJ Union Report, Notify Us Workflow Report, and Participant Roster Change Report.

- Click on **Schedule Report** on the top right corner.
- Select the type of report you would like to run, then click **Next**.
- Check off the **Notify me When report is processed**, if you would like to receive a notification via email once the report has generated.
- Select **PDF** or **CSV**.
- Select Schedule Type for a **One-Time** report or a **Recurring** report. By selecting Recurring, you can select from the drop-down how often you would like to receive this report. (*Daily, Weekly, Bi-weekly, Monthly, Quarterly, Semiannually, annually.*)
- You can enter the Employer ID, Account ID, Invoice type, transaction type, reporting start and stop date. Lastly, you can also select Invoice status and transaction status if it's needed for the specific reporting being ran.

- If only the date is needed, Select the date/period report will be generated for, and the time as well. Next, Click **Schedule**.
- A green banner will appear, stating “*xxxxxx report has been scheduled and will begin momentarily.*” Once completed another pop-up will appear once stating the report is ready to view.
- Once completed, you click on the report hyperlink to view report.

Notify Us

- These tabs allow employers to contact 32BJ for notification about account changes. The multiple reasons why you would use this tab is to notify us for: Employer Name Change, Gain of Work Location, Loss of Work Location, Newly Organized Building (NOB) and Sale of Building. Notify Us should be submitted within 20 days of the account effective date. Please make sure not to terminate any members.
- Click **Add** on the top right corner and select Employer Escalation Workflow. Then Click Next.
- Select one of the following Reasons from the drop-down field: Loss of Work Location, Gain of Work Location, Sale of Building, Employer Name Change (if not a building sale), Union Request for an Updated Roster, Work location Address Update, and Managing Agent Change
- Enter the **Effective Date of Change** (MM/DD/YYYY this field is mandatory)
- Insert the **Work Location Code**. This must be Numeric and a max of 25 characters.
- Insert the **Work Location Name**. There can only be a max of 250 characters.
- Insert the **Account and Zip Code** (*depending on the Notify Us.*) This must be Numeric and a max of 25 characters.
- Insert **the Old/New Employer Names**. There can only be a max of 100 characters.
- Insert the **Comments**. There can only be a max of 245 characters. Then click **Next**.
- Upload a File. The file cannot be larger than 25 MB. The only type of Files accepted are Excel, Word and PDF. Employers should attach the Roster if they are gaining a work location or if they have a newly organized building. If additional attachments need to be added, for example Union Dues Cards, Employers should send an email with the attachments to Employer Relations

indicating the workflow number they received as the subject line.

- Click **Next**. Once reviewed, click **Confirm**.
- A message appears advising, **Your request has been successfully submitted**. Click, **Done**.
- A request will be generated under the request tab, which will include the Request #, Reason, who submitted the request and the date the request was submitted.
- Users can go back to the existing workflow/request and add attachment, by clicking on the request hyperlink. Click on **Upload**, browse for desired document. Select if file will be a “Document or W9.” Once completed click, **Done**.

Helpful Tips

In this section you will find some helpful tips that will assist you with navigating through the ESS system.

Filter

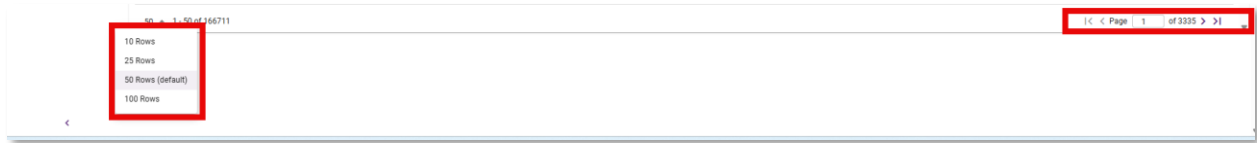
The screenshot displays the 'Pending Invoices' section of the ESS system. The main area contains a table with columns for Actions, Trans #, Invoice & Trans Description, Rpt Period Start, Rpt Period Stop, Trans Type, Due Amount, Account #, Account Name, and WL Name. A 'Filters' sidebar is open on the right, showing search criteria for Trans #, Account Search, Trans Type, Invoice & Trans Description, Rpt Period Start Date, and Rpt Period Stop Date. A red box highlights the 'Filter' icon in the top right corner of the interface.

This Function allows you to narrow down your number of grids being displayed at once within that specific tab.

- Click the **Filter** icon on the top right corner. A new row of grids displays.
- Enter the key information to narrow down your search. Then Click **Apply**.
- The grid displays only rows matching the criteria you entered.

- Click the X within Account Search to Clear the filter. You will revert to the original display.

Rows



In ESS this functionality allows you to extend the number of rows being displayed at once. This will be helpful if you want to display a large number of records at once.

- Click the drop-down icon at the bottom left corner.
- You will be able to choose between viewing 10 rows to 100 Rows

Export

This function in ESS allows you to create a soft copy of the data being displayed in the system.

Actions	ID	SSN	Name	Status	Hire Date	Termination Date	Termination Reason	Job Type	Job Class	Current Hourly Wage Rate	Account #	WL #	WL Name	Contract Name
Roster Change	5301460	XXX-XX-0901	BASKET, MARIA ROBIN	Active	06/15/2016			Full Time	OTHER 85%	\$27.15	74136	117607	1121-1127 Broadway	Master RAB Cc Building Agree
Roster Change	5301463	XXX-XX-0115	BROWN, DAVID LUIS JR	Active	05/15/2021			Full Time	OTHER 75%	\$23.14	74136	117607	1121-1127 Broadway	Master RAB Cc Building Agree
Roster Change	5301374	XXX-XX-9123	DOE, JOHN	Active	06/01/2023			Full Time	OTHER + 29	\$21.00	72454	210628	211 MERRIMACK ST	MCNE Me Too Prevailing Wag
Roster Change	5295623	XXX-XX-5656	DRAGOVIC, RAFAEL	Active	01/01/2022			Full Time	OTHER + 29	\$22.38	72454	210628	211 MERRIMACK ST	MCNE Me Too Prevailing Wag
Roster Change	5301462	XXX-XX-0903	GRACE, SAVANNAH N	Active	03/14/2016			Full Time	OTHER 85%	\$26.22	74136	117607	1121-1127 Broadway	Master RAB Cc Building Agree
Roster Change	5295624	XXX-XX-9999	KNIGHT, PHYLLIS	Active	01/01/2013			Full Time	OTHER + 29	\$29.36	72454	210628	211 MERRIMACK ST	MCNE Me Too Prevailing Wag
Roster Change	5295624	XXX-XX-7878	PORTILLO, TERESA	Active	01/01/2023			Full Time	OTHER + 20 - 29	\$29.00	72454	210628	211 MERRIMACK ST	MCNE Me Too Prevailing Wag
Roster Change	5301461	XXX-XX-0993	RIVERA, ANTHONY	Active	10/01/2001			Full Time	OTHER (100%)	\$32.85	74136	117607	1121-1127 Broadway	Master RAB Cc Building Agree
Roster Change	5301464	XXX-XX-1598	WEINBERGER, VANESSA HAYLEY	Active	02/08/2011			Full Time	OTHER (100%)	\$36.80	74136	117607	1121-1127 Broadway	Master RAB Cc Building Agree

- Click on **Export Grid** on the top right corner.
- A pop up appears where you will be able to open the document and save it according to your preference.
- Verify file displays all desired information.

Exporting will be available in all tabs of ESS minus the Help and Support tab. (*On the Invoices tab you must select More to Export a file*)

Sorting

By clicking on the doubled sided arrow on the header title you will be able to sort by **ascending** and **descending** order.

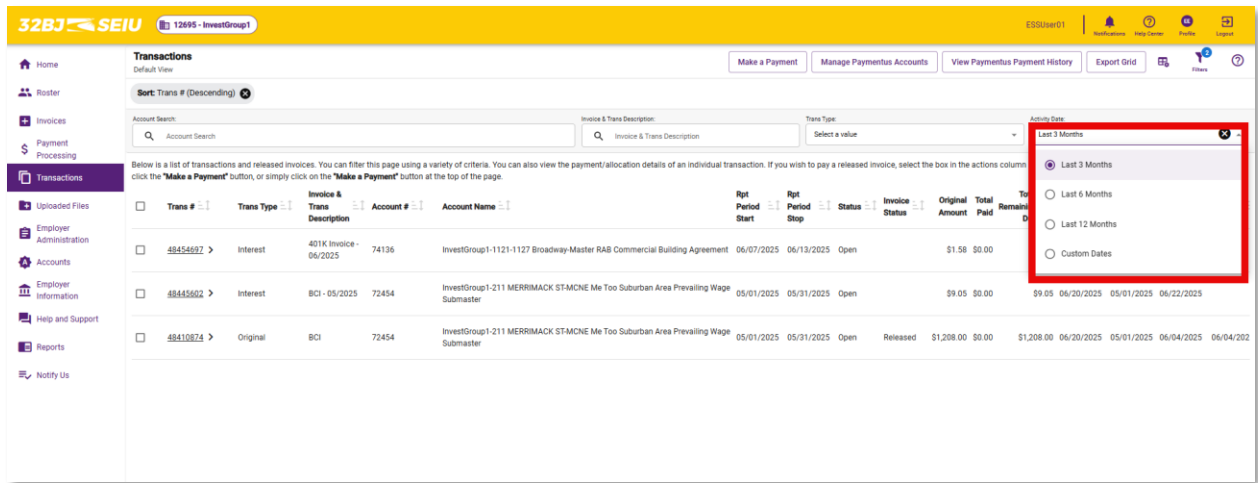
The screenshot shows the 'Pending Invoices' interface. At the top, there are buttons for 'Create Invoice', 'Create Adjustment', 'Release Selected', and 'Delete Selected'. Below these, the 'Sort' dropdown is set to 'Rpt Period Start Date (Descending)'. The table below contains the following data:

Actions	Trans #	Invoice & Trans Description	Rpt Period Start	Rpt Period Stop	Trans Type	Due Amount	Account #	Account Name	WL Name	Agreement Type	District
[Release]	48459037	BCI	07/01/2025	07/31/2025	Original	\$3,850.50	72454	InvestGroup1-211 MERRIMACK ST-MCNE Me Too Suburban Area Prevailing Wage Submaster	211 MERRIMACK ST		
[Release]	48458081	401K Invoice	06/14/2025	06/20/2025	Original	\$210.00	74136	InvestGroup1-1121-1127 Broadway-Master RAB Commercial Building Agreement	1121-1127 Broadway	NYC Commercial Agreements	New York Metro
[Release]	48453059	401K Invoice	06/07/2025	06/13/2025	Original	\$210.00	74136	InvestGroup1-1121-1127 Broadway-Master RAB Commercial Building Agreement	1121-1127 Broadway	NYC Commercial Agreements	New York Metro
[Release]	48425167	401K Invoice	05/19/2025	05/25/2025	Original	\$0.00	72454	InvestGroup1-211 MERRIMACK ST-MCNE Me Too Suburban Area Prevailing Wage Submaster	211 MERRIMACK ST	New England Commercial Agreements	New England 615
[Release]	48458047	BCI	04/01/2025	04/30/2025	Original	\$13,443.80	74136	InvestGroup1-1121-1127 Broadway-Master RAB Commercial Building Agreement	1121-1127 Broadway	NYC Commercial Agreements	New York Metro
[Release]	48425168	BCI	03/01/2025	03/31/2025	Adjustment	\$3,916.57	72454	InvestGroup1-211 MERRIMACK ST-MCNE Me Too Suburban Area Prevailing Wage Submaster	211 MERRIMACK ST	New England Commercial Agreements	New England 615
[Release]	48410866	BCI	02/01/2025	02/28/2025	Original	\$1,268.40	72454	InvestGroup1-211 MERRIMACK ST-MCNE Me Too Suburban Area Prevailing Wage Submaster	211 MERRIMACK ST	New England Commercial Agreements	New England 615
[Release]	48410875	BCI	01/01/2025	01/31/2025	Original	\$1,230.65	72454	InvestGroup1-211 MERRIMACK ST-MCNE Me Too Suburban Area Prevailing Wage Submaster	211 MERRIMACK ST	New England Commercial Agreements	New England 615
[Release]	48410877	BCI	12/01/2024	12/31/2024	Original	\$1,200.00	72454	InvestGroup1-211 MERRIMACK ST-MCNE Me Too Suburban Area Prevailing Wage Submaster	211 MERRIMACK ST	New England Commercial Agreements	New England 615

You will also be able to sort from the Filters Tab, allowing you to narrow down your search.

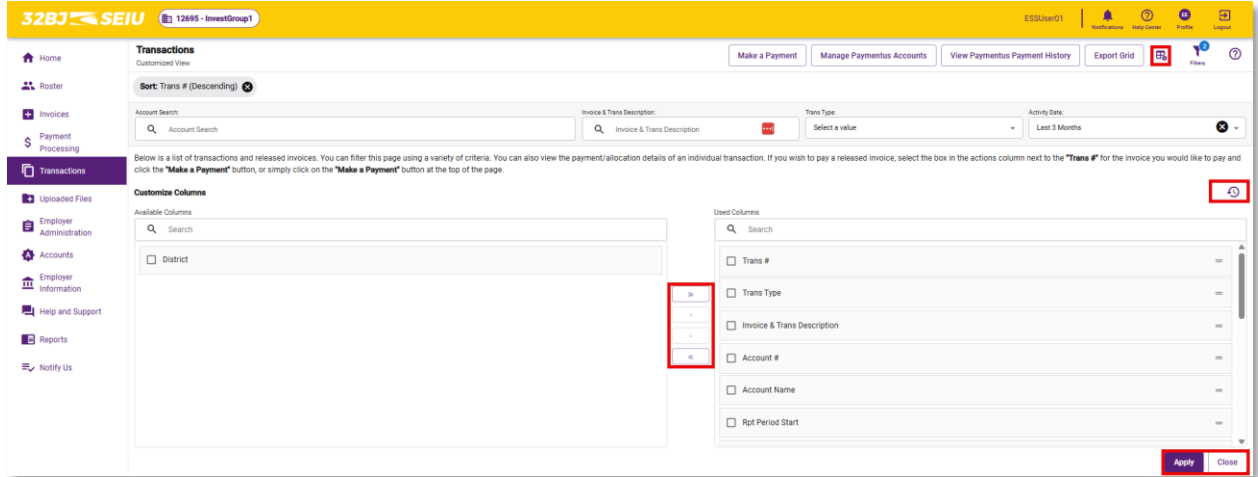
The screenshot shows the 'Pending Invoices' interface with the 'Filters' panel open on the right. The 'Sort by' dropdown is set to 'Trans #'. The table data is the same as in the previous screenshot.

Activity Date Range



The transaction tab has an Activity Date Range drops down menu. It is automatically defaulted to 3 months but can be extended to view all of time. This is to ensure that the ESS system is performing at its best.

Customize Columns



Here you will have the option to select Custom Columns to view specified fields. Select the Column Header you want to remove from your view, then click on the < sign to move to the available Column section. This will move the unwanted Columns to the left. The Columns on the right side will be viewable, then click **apply** and close. Clicking on >> will bring on the Columns from the right side to the left. To reset, click on the rewind clock on the right corner.