EMPLOYER PORTAL USER GUIDE

AUGUST 17, 2023

WELFARE & PENSION ADMINISTRATION SERVICE, INC.

PO Box 34203, Seattle, WA 98124

TABLE OF CONTENTS

WELCOME TO EMPLOYER PORTAL ONLINE

Welcome to the new Employer Portal. Employer Portal is a secure series of Web pages that enables employers to submit monthly employer reporting forms to the Administration Office electronically.

GETTING STARTED

Prior to working with the Employer Portal application, you must have hardware and software installed that meets or exceeds certain minimum technical requirements and you must work with the Administration Office to complete the Initial Employer Setup process.

EMPLOYER PORTAL TECHNICAL REQUIREMENTS

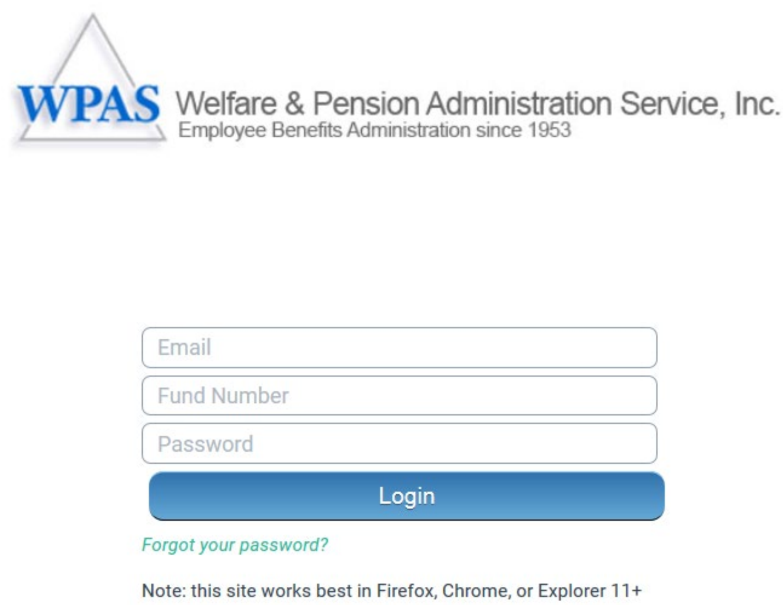
Firefox: Required: 10+ (recommended: within last 3 stable releases)
Chrome: Required: 17+ (recommended: within last 3 stable releases)
Internet Explorer: Required: 9+ (recommended: 11+)

INITIAL EMPLOYER SETUP

Prior to completing and submitting electronic reports, you will need to contact the Administration Office to complete the Initial Employer Setup process. You will work with the Administration Office to:

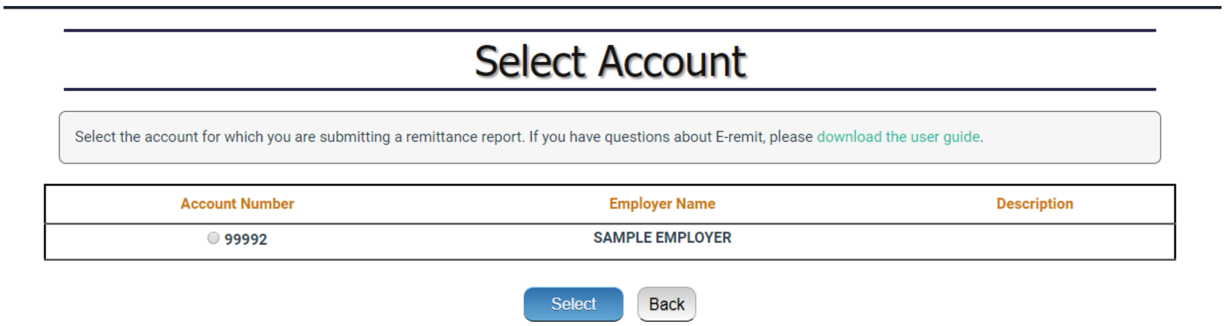
- Confirm sign-on (User ID and Password) information and connectivity
- Setup any company Owner/Operators (employees, often company owners, who must be reported each month)
- Establish employer details (address, phone numbers, import formats, etc.)

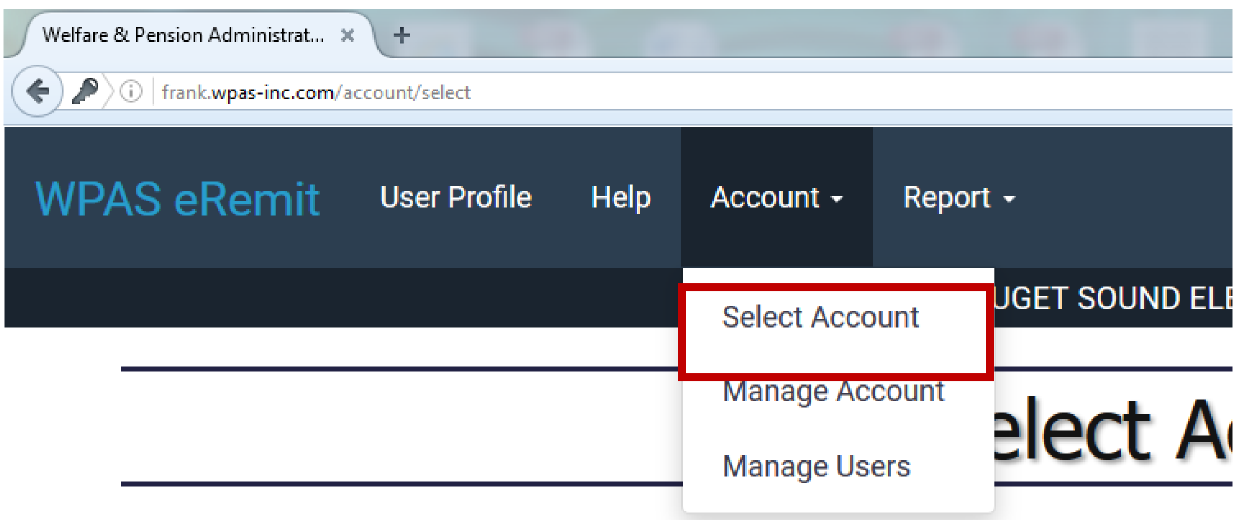
You can update any employer setup options by contacting the Administration Office at any time.



SELECT ACCOUNT SCREEN

After you have received your initial login information, you will be directed to the Select Account Screen. This screen will show all the open accounts available to report hours on. Contact the Administration Office if the account you need is not available. You can get back to this screen by using the account tab in the menu bar and selecting "Select Account."





EMPLOYER PORTAL MANAGE ACCOUNT SCREEN

Click the **Manage Account** link on the account menu bar at the top of any page within the Employer Portal application to return to the Manage Account page.

The Home page provides several options:

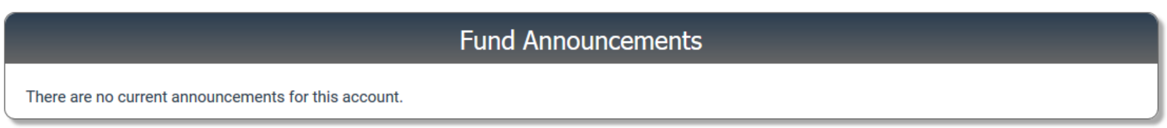
ANNOUNCEMENTS

The Employer Home page displays current announcements from the Administration Office.

There are three different types of announcements:

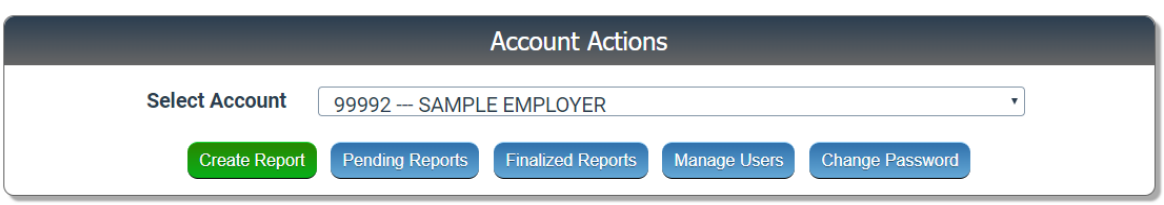
- *General Announcements*
  These are announcements that affect all employers; for example, a rate change notice or new fund notification. These announcements are displayed to all employers.
- *Collective Bargaining Agreement-Related Announcements*
  These are announcements that are related to a specific Collective Bargaining Agreement (CBA); for example, Washington AGC or Project Labor Agreements only. These announcements are displayed to all employers signatory to a particular agreement.
- *Employer-Specific Announcements*
  These are announcements that are employer-specific; they only apply to certain employers or a single employer; for example, a reminder to submit a missing report. These announcements are displayed only to the effected employer(s).

Be sure to check the **Announcements** section every time you login to the Employer Portal application for important news from the Administration Office. If no announcements are active for the current date, the text "There are no current announcements for this account" will display in the **Announcements** section of the Manage Account page.



ACCOUNT OPTIONS

Follow the available links to Create Reports, View Pending Reports, View Finalized Reports, Manage Users authorized to have access to the portal, or change the password for your login.



VIEW ACCOUNT INFORMATION

This section shows the account number, rate code, rate description, Federal Tax Id, Local number, and newest start date for a specific account.

Account Information

Account Number	99992	**Federal Tax ID**	0
Area Number	001	**Local Number**	0302
Term Date		**Company Code**	
Rate Code	0F0	**New Date**	05/01/2011
Rate Description	LOCAL 612 WA AGC OVERALL		

RATE INFORMATION

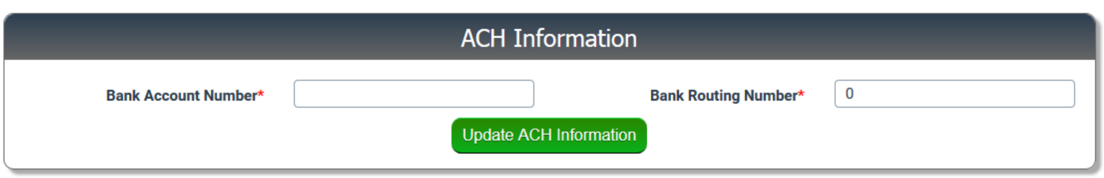
See the bill rate for each of the fringe benefits due for employees.

Rate Information

Type Number	Description	Bill Method	Bill Rate
001	HEALTH AND WELFARE	Hourly	8.0700
002	PENSION	Hourly	12.4000
006	TRAINING	Hourly	0.7000
118	LOCAL 302 DUES	Percentage	0.0200
129	302 UNION PROGRAMS	HAS	0.3000
345	FED POL ACT	Hourly	0.0500
448	INTERNAT'L TRAINING	Hourly	0.0500

SETUP ACH INFORMATION

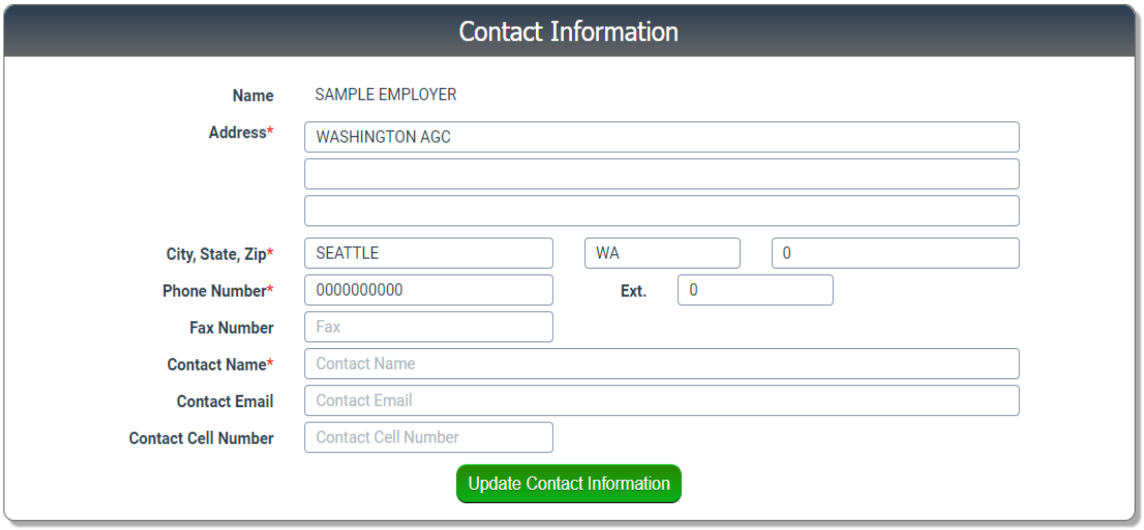
To pay electronically, for Electronic Funds Transfer (EFT) processing, enter employer Bank Account Number and Routing Number and click Update ACH Information to start the pre-note process. This process can take up to ten (10) business days.



- A one-time pre-notification process ("dry run") must be initiated to validate the bank routing and account number information and ensure that an EFT (Electronic Funds Transfer) will take place without errors. The pre-note process will occur the first time you set up a new bank account or anytime you change bank account information.
- **Note:** The Administration Office will only notify you if the pre-note process is **not** successful.

VIEW OR EDIT CONTACT INFORMATION

Please make sure this section is updated when contact information changes. This will update the records at the Administration Office. ***Do not change the first line of the address if it lists job information.***



CREATE REPORT

There are several options available under the Account Actions section of the Manage Account Page.
Click the Create Report link on the Manage Account page to display the Create Report Page. There are several options available to create a new report:

NEW REPORT- Enter report by hand. This option will have employee data (Names, SSN, & Job Class) preloaded for any employees the Administration Office shows as a current employee.

NEW REPORT (IMPORT DATA)- Load all hour, wage, and vacation information from a .CSV file. See page (11) for instructions on saving an excel file to .CSV.

BLANK REPORT**-** Enter report with no preloaded data.

NO EMPLOYEES**-** Enter report for employers who have no employees to report for a period.

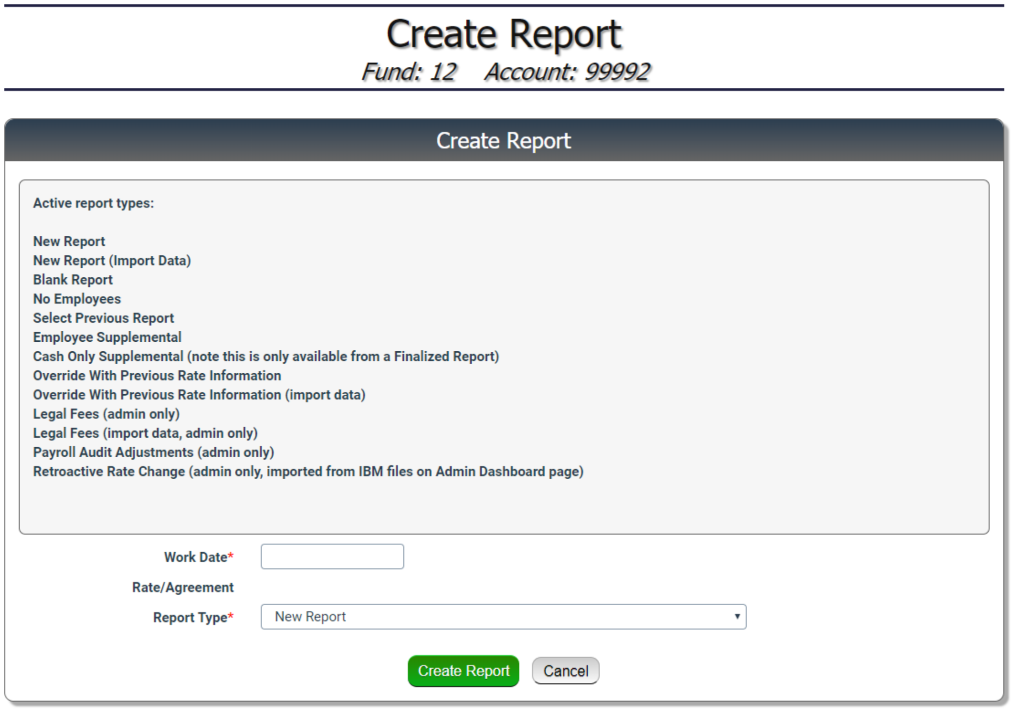
SELECT PREVIOUS REPORT**-** Enter report from data previously hand entered under a **New Report**.

EMPLOYEE SUPPLEMENTAL**-** Enter corrected data for employees. Has both options for preloaded or no preloaded information.

CASH ONLY SUPPLEMENTAL**-** Enter corrected amounts for amounts previously paid or shorted in error. – **Only available until midnight on the same day as a report is finalized.**

OVERRIDE WITH PREVIOUS RATE INFORMATION**-** Enter report for rates that change mid-month.

OVERRIDE WITH PREVIOUS RATE INFORMATION (IMPORT DATA)**-** Load all hour, wage, and vacation information from a .CSV file for rates that change mid-month.

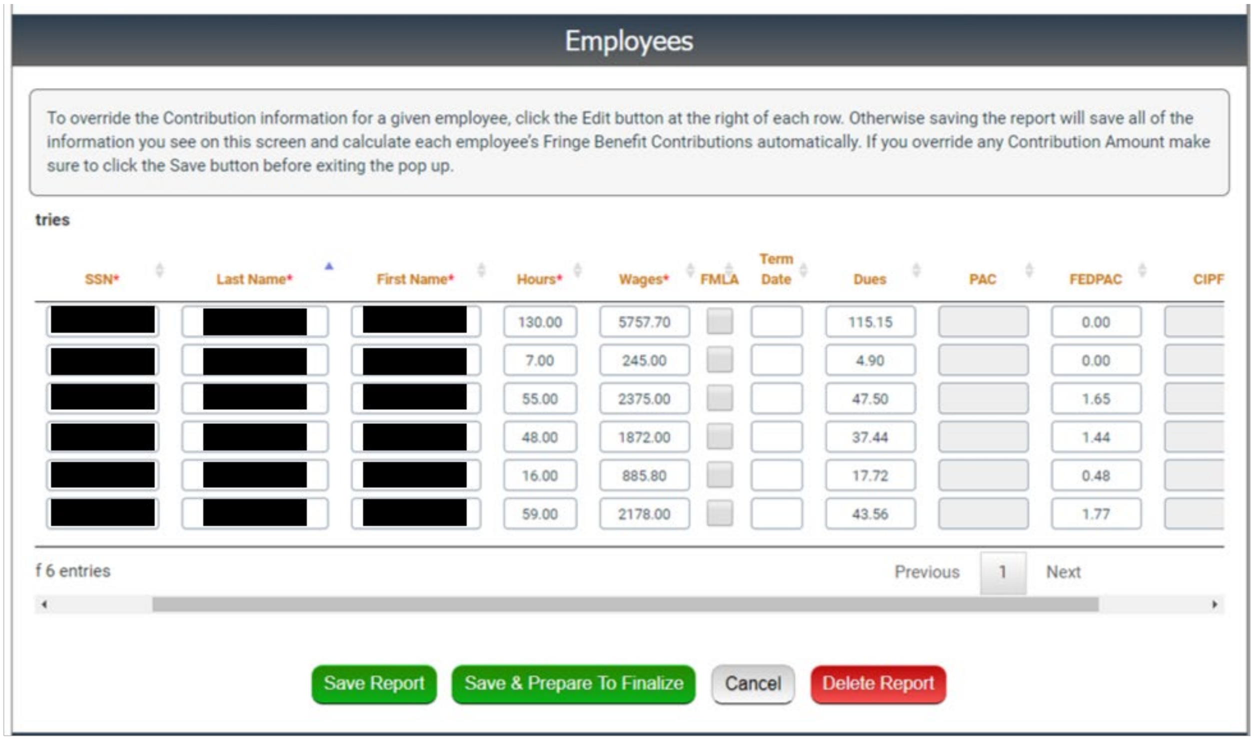


Fill in work date to be reported and choose the report type from the dropdown menu. The Rate/Agreement information will fill in once the work date is chosen.

CREATING EMPLOYEE DETAILS

The report options that preload with data will load the SSN, Last Name, and First Name only. Then hours and wages must be entered.

- **FMLA Column** – Only to be used when an employer needs to report an employee out on FMLA. Otherwise, leave this column blank.
- **Term Date** – Allows employers to remove employees from future reports. Once a term date is added, the employee will no longer preload after the term date.
- **Dues/PAC/FEDPAC/CIPF** – These columns are overridable for situations where the fringe isn't applicable, or overrides are required because a fringe is taken from the employees check. The data will calculate and must be overridden with an amount or 0.00 if nothing should be reported.



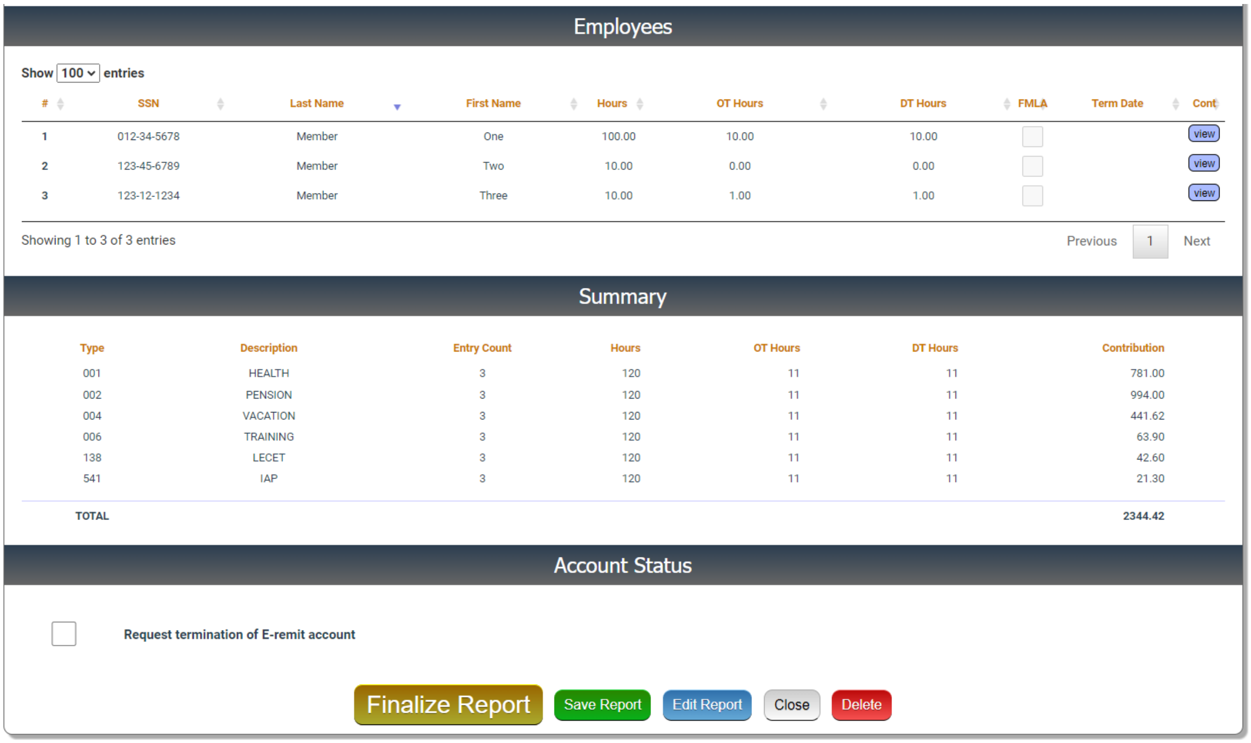
Once all the data has been entered, the report can either be saved, prepared to finalize, cancelled, or deleted.

- Save Report – will place the report as a Pending report. It can be closed, and all data will be saved for later.
- Save and Prepare to Finalize – System will calculate amounts due to be checked prior to finalizing.
- Cancel – Will save report as a pending report but will not save any of the non-preloaded data.
- Delete Report – Will delete the report. This option cannot be retrieved in the future.

SAVE AND PREPARE TO FINALIZE

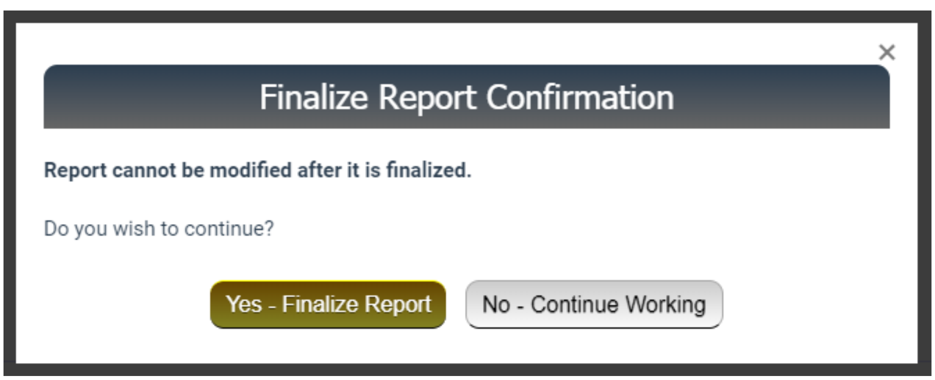
The system will use the data entered to calculate the amounts due. The View button will show the calculations for all fringes for each employee individually. Carefully check the Summary for accuracy, check any of the applicable boxes, and use one of the options available at the bottom of the screen.

- Finalize Report – Will finalize report and create report copy for Employer records and a Payment coupon that needs to be sent with a check if not using ACH option.
- Save Report – Will save the report as is and place it back in pending status.
- Edit Report – Returns to the prior edit screen for data changes where necessary.
- Close – Will close the report without saving any changes.
- Delete – Will delete the report and the data. After Delete is final, this data cannot be retrieved.



REQUEST TERMINATION OF EMPLOYER PORTAL ACCOUNT- sends a request to terminate the account. Once approval is received, the Administration Office will terminate the account, so no more remittances will be required.

Once the data and calculations look accurate, press the finalize report button. Once the report is finalized, the data cannot be changed and cannot be stopped. A pop-up will appear to confirm a second time that the report should be finalized.



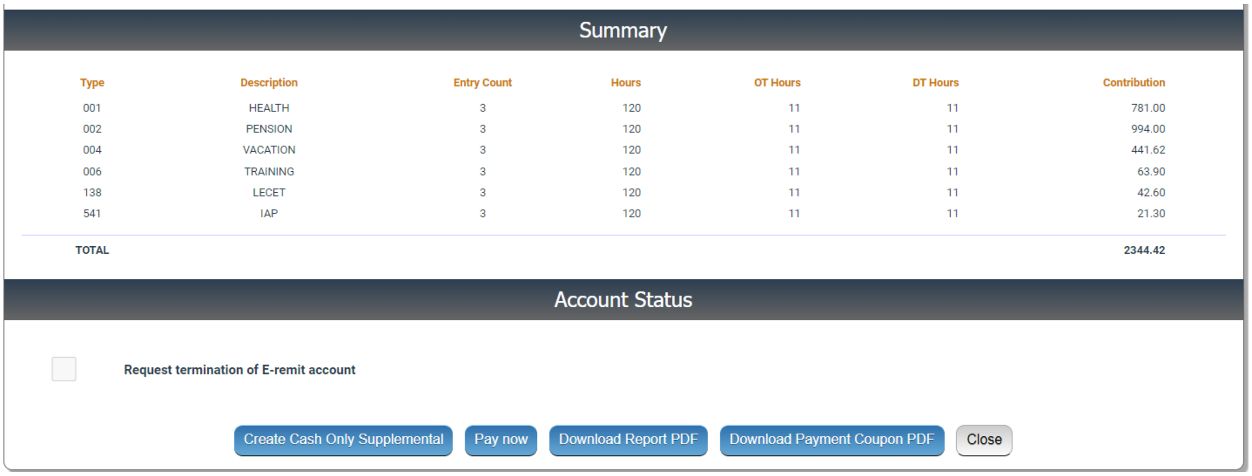
After the report has been finalized, the Employer Portal Finalized Report screen will appear. At the bottom of the page, there will be options for Create Cash Only Supplemental, Download Report PDF, and Download Payment Coupon PDF.

CREATE CASH ONLY SUPPLEMENTAL: Will allow a supplemental payment or money credit for payment changes for prior month payment errors.

DOWNLOAD REPORT PDF: Will create a report including all employee data. This report does not need to be sent to the Administration Office. It is for Employer records only.

DOWNLOAD PAYMENT COUPON PDF: Creates a payment coupon to include with a check for the Administration Office if the ACH option isn't used.

CLOSE: Will close the report. The report can be accessed in the future under the finalized report buttons.



Summary

Type	Description	Entry Count	Hours	OT Hours	DT Hours	Contribution
001	HEALTH	3	120	11	11	781.00
002	PENSION	3	120	11	11	994.00
004	VACATION	3	120	11	11	441.62
006	TRAINING	3	120	11	11	63.90
138	LECET	3	120	11	11	42.60
541	IAP	3	120	11	11	21.30
TOTAL						2344.42

Account Status

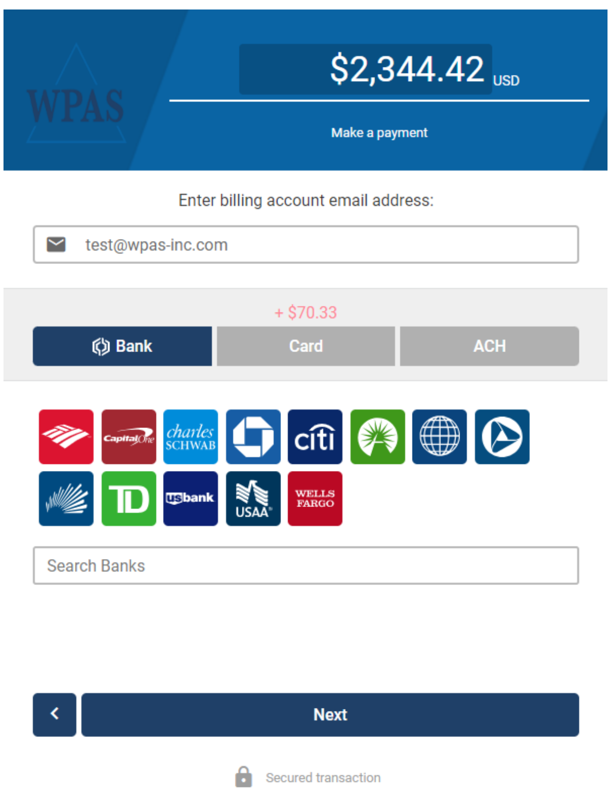
Request termination of E-remit account

Create Cash Only Supplemental | Pay now | Download Report PDF | Download Payment Coupon PDF | Close

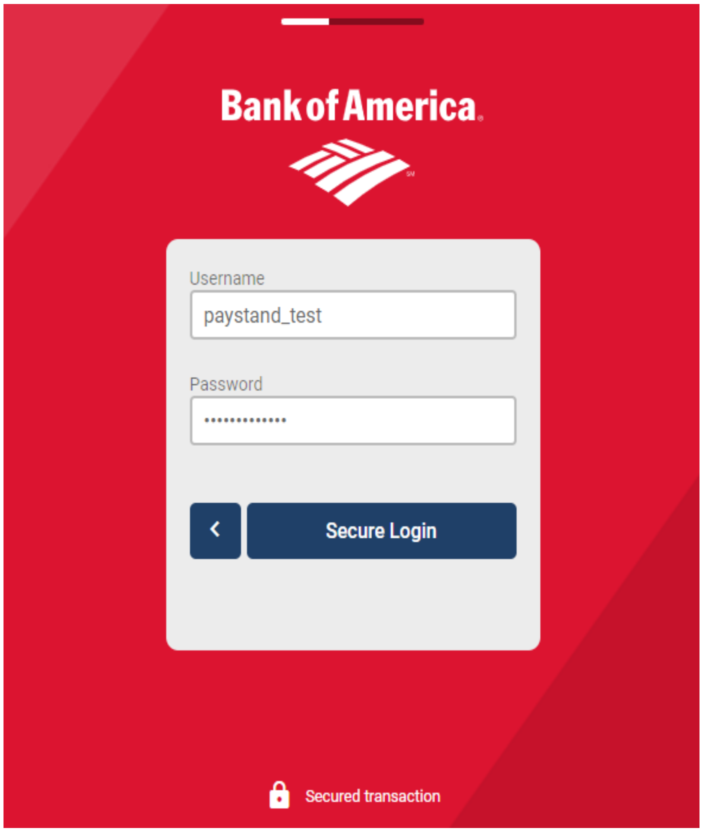
PAY REPORT WITH PAY NOW

To process the report with one of the electronic payment options, click the pay now button. A pop-up will appear with options for a Bank to Bank transfer or an ACH transaction. Both options will require an email address to be entered first in the pop-up. Enter the email address, then choose the payment option.

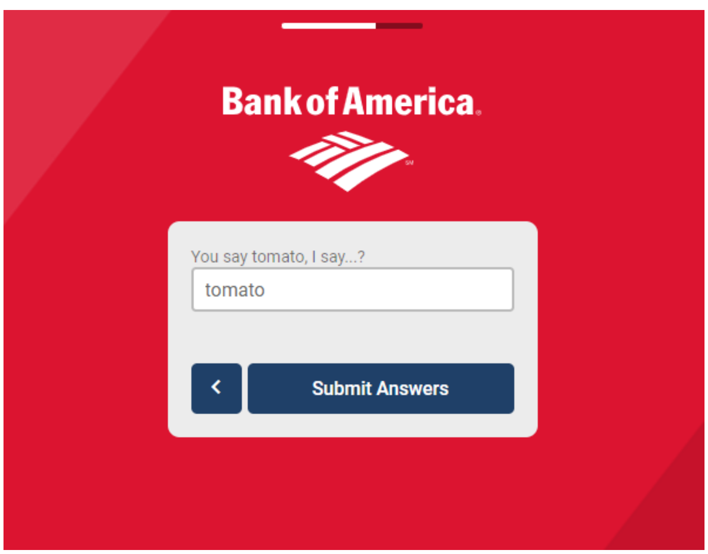
BANK TO BANK TRANSFER: Will require payer to log into their bank account and pick a payment account.



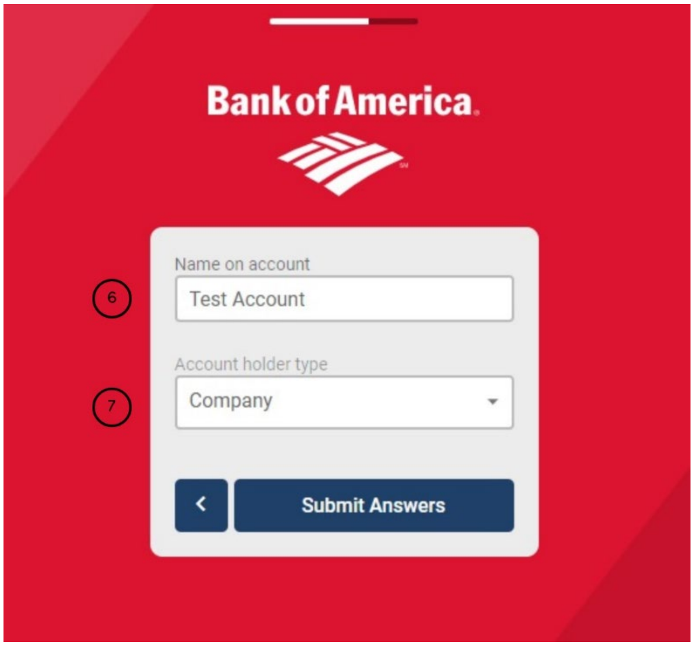
1. Choose the banking institution and click next.



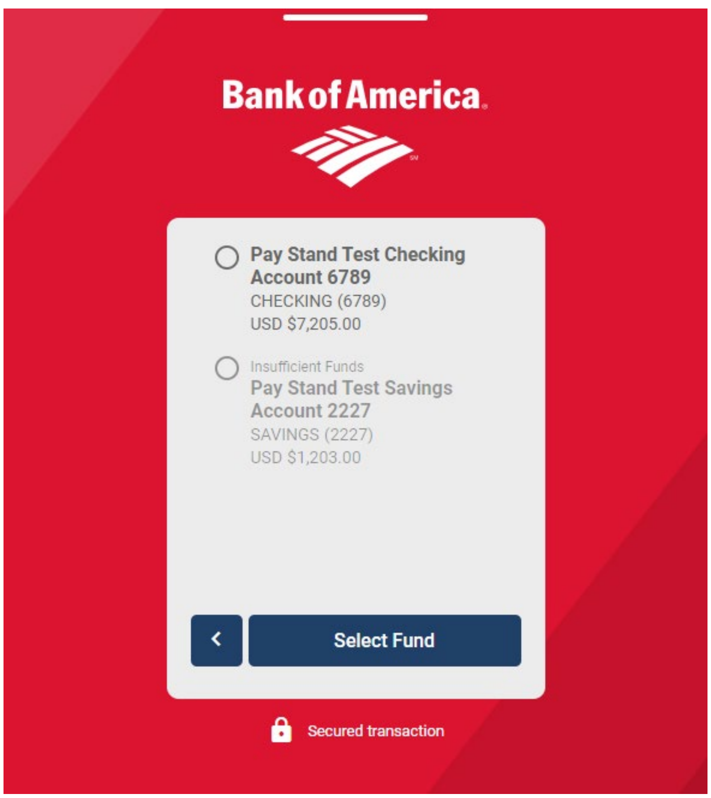
2. Enter Bank Username and Password.
3. Click Secure Login.



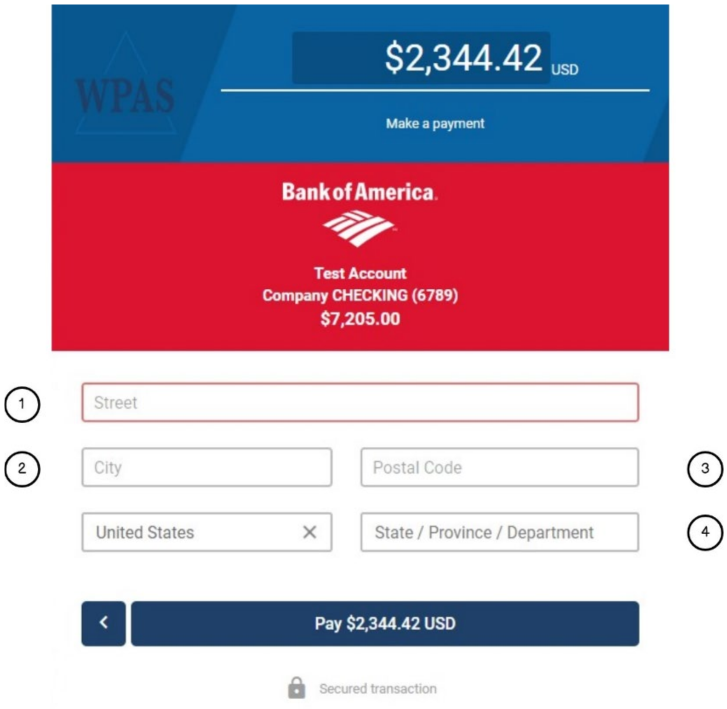
4. Enter Security Question or Multi-Factor Authentication code if required.
5. Click Submit Answers.



6. Enter Name on the Bank Account.
7. Use the dropdown menu to pick Account holder type: Individual or Checking.
8. Click Submit Answers.

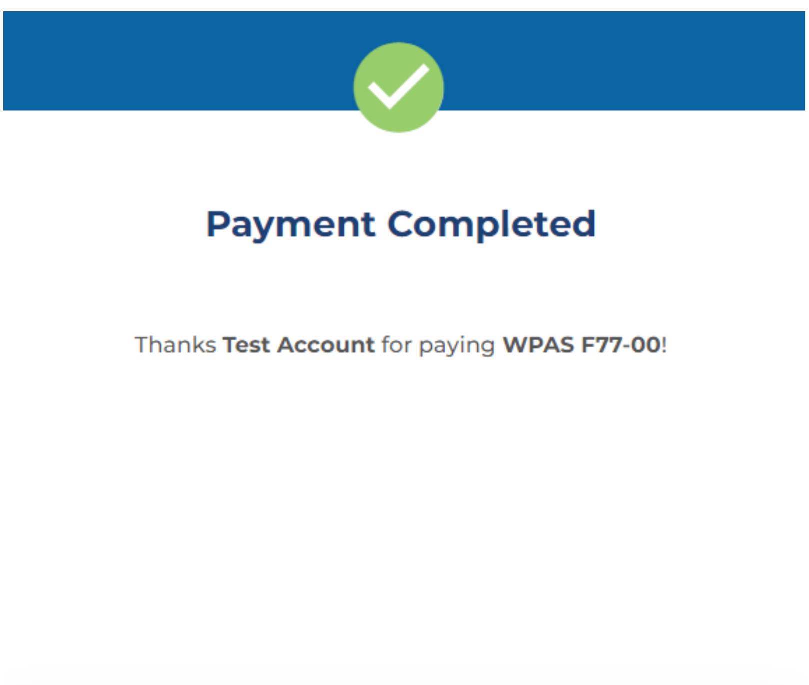


9. Pick Account to use for payment.
10. Click Select Fund.

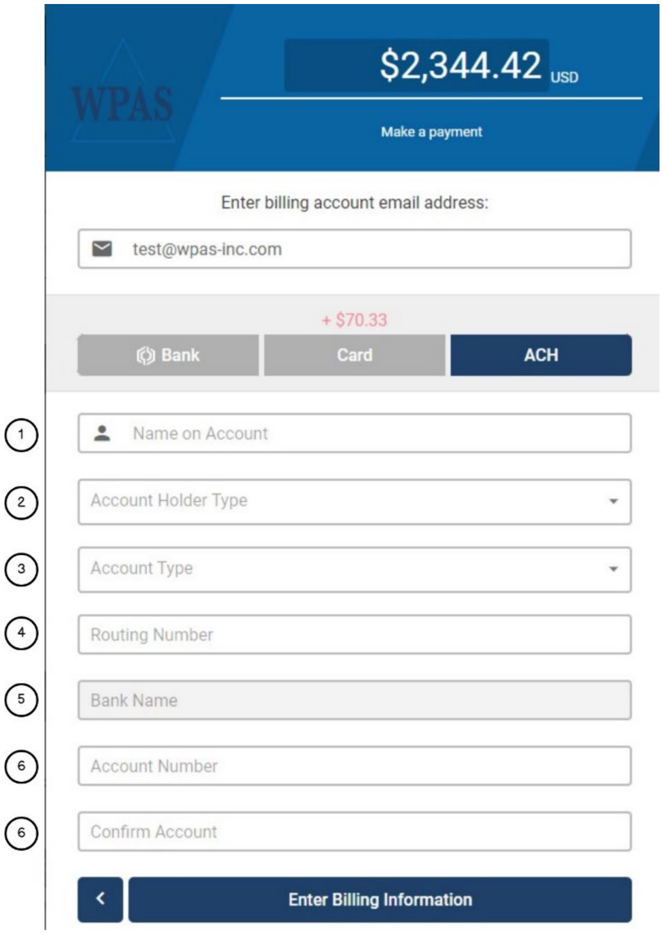


Step	Action
1	Enter Company Billing Street Address
2	Enter Company Billing City
3	Enter Company Billing Postal Code
4	Enter Company Billing State

After the pay button is pressed, the payment complete screen will appear. A green checkmark means that payment was processed successfully. If payment is not successful, a red X will display with a notification of why the payment was not processed.

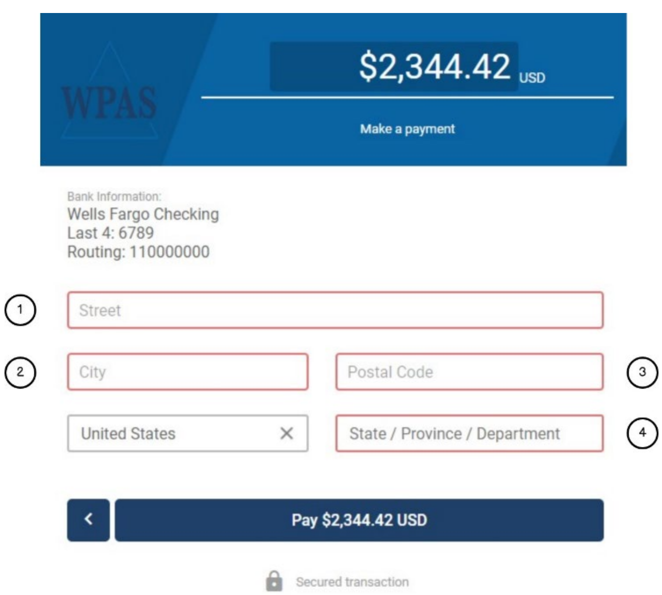


ACH PAYMENT: Will require payer to enter all the banking information for payment bank account.



Step	Action
1	Enter a recognizable name for the Bank Account to be used for payment
2	Use the dropdown menu to choose the Account Holder Type: Individual or Company
3	Use the dropdown menu to choose the Account Type: Saving or Checking
4	Enter the Bank Account Routing Number
5	The Bank Name will fill based on the Routing Number
6	Enter the Bank Account Number

Once Information has been entered, click the Enter Billing Information Button.



Step	Action
1	Enter Company Billing Street Address
2	Enter Company Billing City
3	Enter Company Billing Postal Code
4	Enter Company Billing State

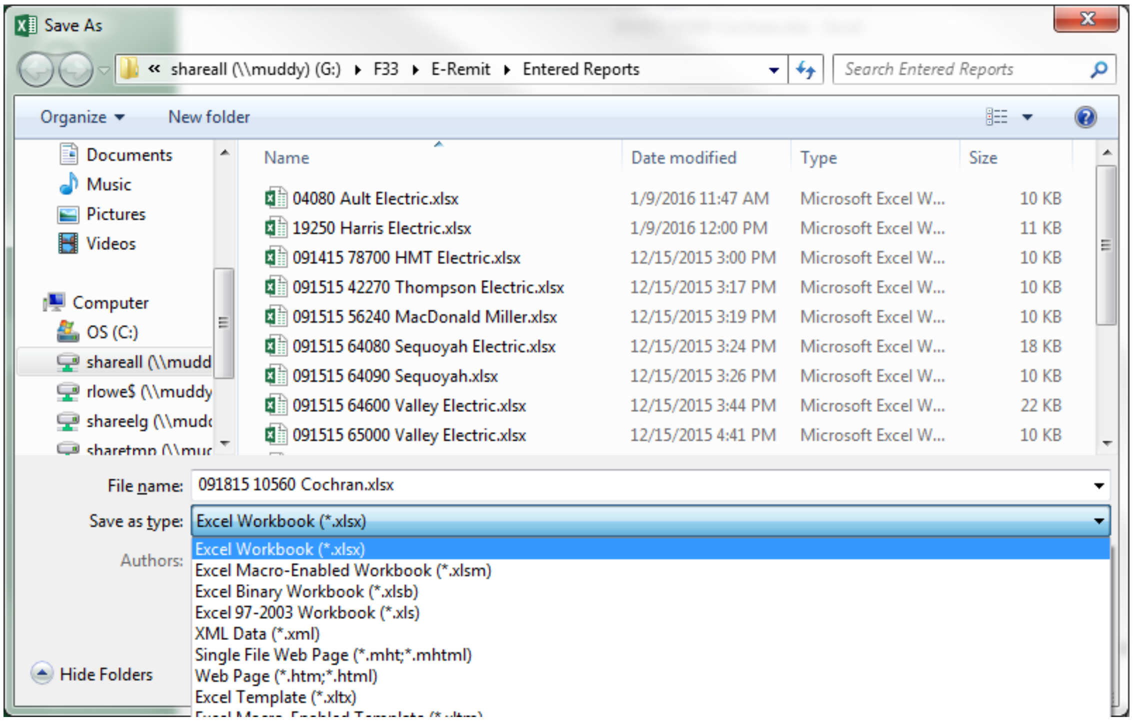
SAVING SPREADSHEET AS .CSV FILE:

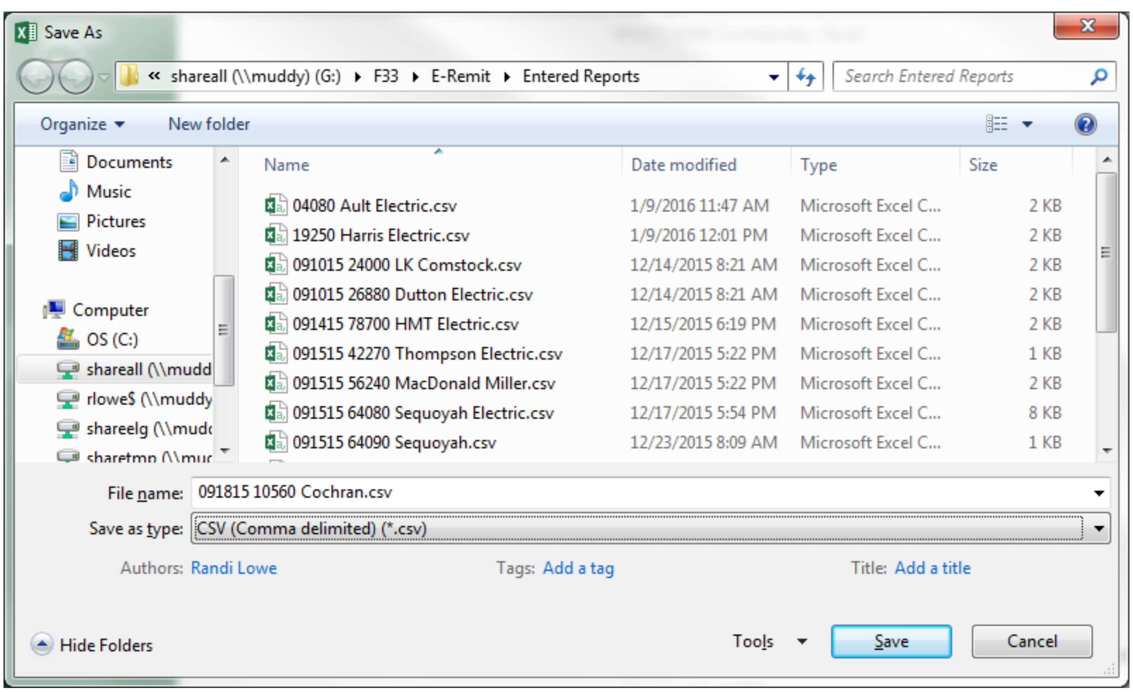
Note which row contains the headers for your spreadsheet. You'll need this when entering the report.

Go to File and click Save As.

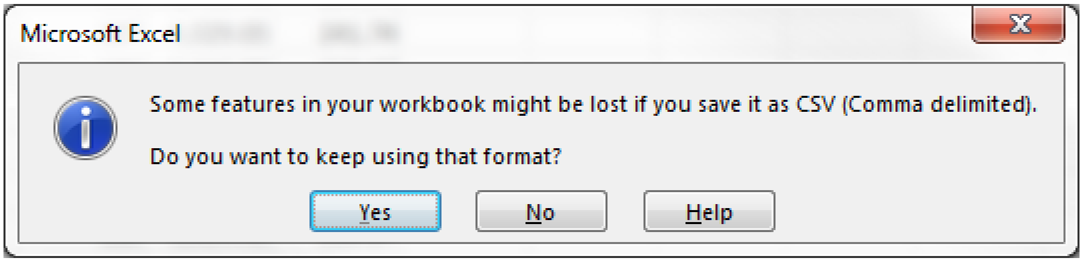
Name the spreadsheet and change the Save as Type from .xlsx or .xls to CSV comma delimited.

Click Save.





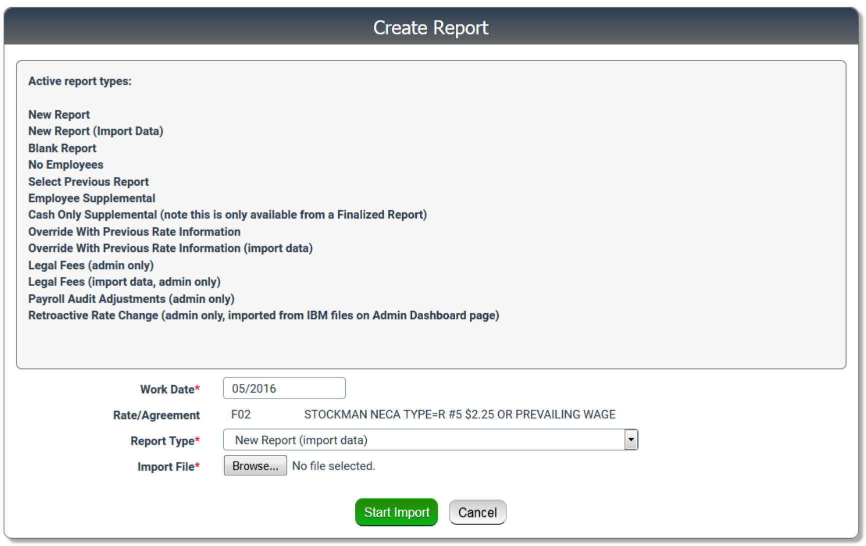
An alert will pop up. Click yes to save the spreadsheet as a CSV file.

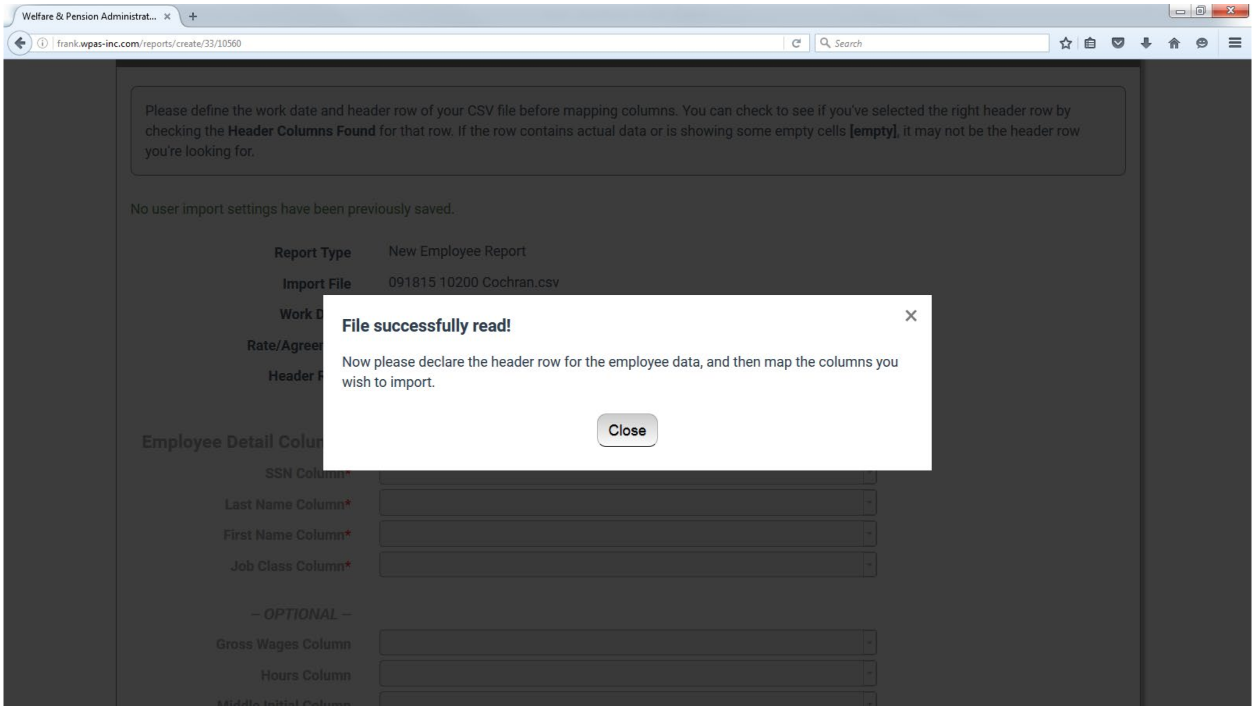


IMPORTING AND MAPPING SPREADSHEET

Chose the New Report (import data) report type and click browse. Find the .CSV file that was saved previously and click open.

Click Start Import.





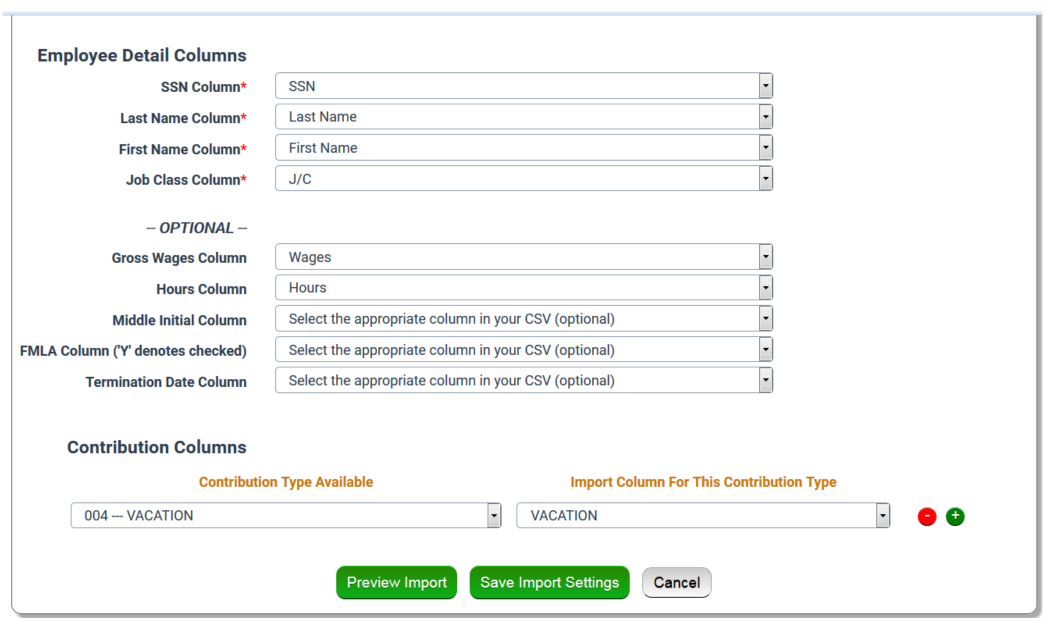
Click Close

Enter the number of the row that contains the headers in the Header Row area and tab down.

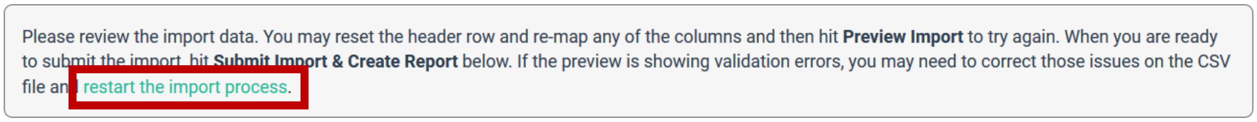
Find the header that corresponds with the required Data.

If you will use the same spreadsheet format for all your future reports click the save import settings (these can be changed later).

Click Preview Import



This will create details with the data in the spreadsheet. Review carefully to make sure the data populates the columns as you would expect. If something doesn't work, click the link to restart the import process. If everything looks right, click Submit Import and Create Report.



Once the option to Submit Import and Create report has been used, the system will automatically forward to the employee creation screens. Use the instructions starting on page 8 to finish finalizing the report.

CONTACTING THE ADMINISTRATION OFFICE

Please contact the Administration Office with any questions about the Employer Portal.

Mailing Address:

Michigan Laborers' Fringe Benefit Funds
P.O. 211133
Eagan, MN 55121-2533

Metro Laborers' Fringe Benefit Funds
P.O. 211133
Eagan, MN 55121-2533

Plan Administrator:

Welfare & Pension Administration Service, Inc.
Phone: (877) 645-2267
Fax: (206) 505-9727

Contact Information

WPAS

Phone: (877) 645-2267

e-RemitMIL@wpas-inc.com