

Carpenter Funds Administrative Office of Northern California, Inc.



Quick View of
Employer Online
Reporting
(ERSS)

ERSS “Log In”

Thursday, March 8, 2012

 **Carpenter Funds Administrative Office**
of Northern California, Inc.

User:

Password:

[Forgot User](#) | [Forgot Password](#)

Home Page

In order to process a report, you may click **“Review Employer Reports, Billing History & Payments”**

OR

Select **“Reports, Billing History & Payments”** from the drop down in the top right hand corner of the screen.

Thursday, March 8, 2012 | Welcome USER NAME

Account Settings | Logout

Carpenter Funds Administrative Office
of Northern California, Inc.

Home

PLEASE NOTE: Using the browser's back button within V3 will cause your session to become invalid. Please do not use the browser's Back button

Employer Management

- [Review Employer Reports, Billing History & Payments](#)

Import/Export Files

- [Import New System Data](#)
- [Export Existing System Data](#)

News and Alerts

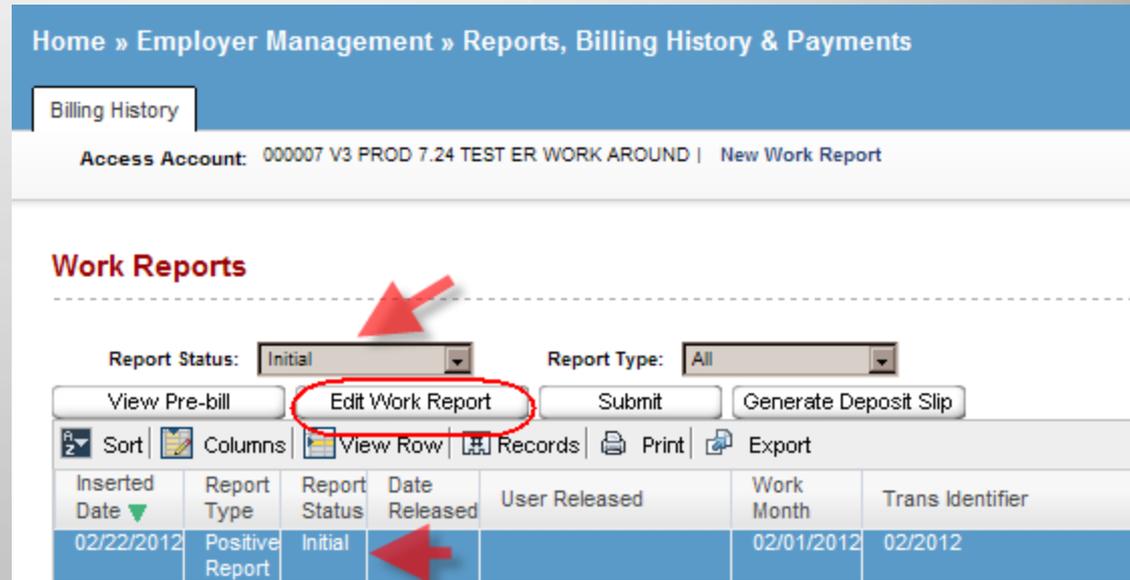
We are currently developing and testing some new features intended to enhance user processing efficiencies. These "Export" and "Import" features which now appear on the website are not yet ready for external use but will be in the near future.

Edit Work Report

Click:

*Select appropriate row in “Initial”
Report Status

*Click “Edit Work Report”



The screenshot shows a web interface for 'Work Reports'. At the top, there is a breadcrumb trail: 'Home » Employer Management » Reports, Billing History & Payments'. Below this is a 'Billing History' tab and an 'Access Account' field with the value '000007 V3 PROD 7.24 TEST ER WORK AROUND | New Work Report'. The main section is titled 'Work Reports' and contains a table. Above the table are two dropdown menus: 'Report Status' (set to 'Initial') and 'Report Type' (set to 'All'). Below these are four buttons: 'View Pre-bill', 'Edit Work Report' (circled in red), 'Submit', and 'Generate Deposit Slip'. The table has columns for 'Inserted Date', 'Report Type', 'Report Status', 'Date Released', 'User Released', 'Work Month', and 'Trans Identifier'. The first row of data is highlighted in blue and has a red arrow pointing to the 'Initial' status cell. The 'Edit Work Report' button is also circled in red with a red arrow pointing to it.

| Inserted Date | Report Type | Report Status | Date Released | User Released | Work Month | Trans Identifier |
|---------------|-----------------|---------------|---------------|---------------|------------|------------------|
| 02/22/2012 | Positive Report | Initial | | | 02/01/2012 | 02/2012 |

**Each month a New Work Report will be placed in your account in “Initial” status. If it is not there, you may create one using “New Work Report” more details are in the complete ERSS User Guide.

The Work History report should open with the employees that were on your last report.
Verify the employees you wish to report hours for and Enter the hours under the "HW" column ONLY.
When finished, Click SAVE

Work Report Editor - Windows Internet Explorer
http://10.10.200.125/v3prd/app?service=external/EmployerPages:WorkReportPage&sp=1586342&sp=T

Employer: 000007-V3 PROD 7.24 TEST ER WORK AROUND Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND

Criteria

Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND Report Status: Initial Trans#: 3187713
Member Count: 17 Row Count: 17 Report Source: Date Received: Date Released: User Released: Trans Type: 10 - Employer Report Trans Identifier: 02/2012

View Summary View Report

Work History

⊕ Add | Delete | Filter | Modify | Sort | Columns | View Row | Records | Print | Export

| | SSN | Participant | Rate Grouping | Occ | SkL | Start Date | Stop Date | Status | HW | PN | CA |
|--------------------------|-------------|-------------------|-------------------------|-----|-------------|------------|------------|--------|----|----|----|
| <input type="checkbox"/> | 000-00-7987 | ADAMS, MIKE L | CARPENTER MASTER INDEP. | C | J - Journey | 02/01/2012 | 02/29/2012 | ACT | | | |
| <input type="checkbox"/> | 000-00-7945 | ANDERS, MARK | CARPENTER MASTER INDEP. | C | J - Journey | 02/01/2012 | 02/29/2012 | ACT | | | |
| <input type="checkbox"/> | 000-00-7998 | ANDREWAS, JOE | CARPENTER MASTER INDEP. | C | J - Journey | 02/01/2012 | 02/29/2012 | ACT | | | |
| <input type="checkbox"/> | 000-00-7975 | ARREOLA, ERNESTO | CARPENTER MASTER INDEP. | C | J - Journey | 02/01/2012 | 02/29/2012 | ACT | | | |
| <input type="checkbox"/> | 000-00-7990 | ARREOLA, RUDOLPH | CARPENTER MASTER INDEP. | C | J - Journey | 02/01/2012 | 02/29/2012 | ACT | | | |
| <input type="checkbox"/> | 000-00-7937 | AVILEZ, ALEJANDRO | CARPENTER MASTER INDEP. | C | J - Journey | 02/01/2012 | 02/29/2012 | ACT | | | |

Notice the Superintendent and Owner hours only populated in the Fund columns that are applicable to the signed agreement.

Report SAVED

If further editing is needed, click Edit

Or

Click Close

| | | | | | | | | | | | | |
|---|----------------|------------|------------|-----|-------|-------|-------|-------|-------|-------|-------|-------|
| C | J - Journeyma | 03/01/2012 | 03/31/2012 | ACT | 160 | 160 | 160 | 160 | 160 | 160 | 160 | 160 |
| C | J - Journeyma | 03/01/2012 | 03/31/2012 | TRM | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| C | J - Journeyma | 03/01/2012 | 03/31/2012 | TRM | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| C | A8 - Apprentic | 03/01/2012 | 03/31/2012 | TRM | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| C | J - Journeyma | 03/01/2012 | 03/31/2012 | ACT | 160 | 160 | 160 | 160 | 160 | 160 | 160 | 160 |
| C | S - Superinten | 03/01/2012 | 03/31/2012 | ACT | 145 | 145 | | | | | | |
| C | O1 - Owner + | 03/01/2012 | 03/31/2012 | ACT | 145 | 145 | 145 | | | | | |
| C | A6 - Apprentic | 03/01/2012 | 03/31/2012 | ACT | 155 | 155 | 155 | 155 | 155 | 155 | 155 | 155 |
| C | J - Journeyma | 03/01/2012 | 03/31/2012 | ACT | 160 | 160 | 160 | 160 | 160 | 160 | 160 | 160 |
| C | J - Journeyma | 03/01/2012 | 03/31/2012 | ACT | 170 | 170 | 170 | 170 | 170 | 170 | 170 | 170 |
| C | A3 - Apprentic | 03/01/2012 | 03/31/2012 | TRM | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| C | A2 - Apprentic | 03/01/2012 | 03/31/2012 | ACT | 160 | 160 | | 160 | 160 | 160 | 160 | 160 |
| C | A1 - Apprentic | 03/01/2012 | 03/31/2012 | ACT | 84 | 84 | | | 84 | 84 | 84 | 84 |
| C | A1 - Apprentic | 03/01/2012 | 03/31/2012 | ACT | 88 | 88 | | | 88 | 88 | 88 | 88 |
| | | | | | 1,877 | 1,877 | 1,110 | 1,125 | 1,297 | 1,297 | 1,297 | 1,297 |
| | | | | | 1,877 | 1,877 | 1,110 | 1,125 | 1,297 | 1,297 | 1,297 | 1,297 |

Click View Summary

Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND

Report Status:

Trans#:

Report Source:

Trans Type:

Date Received:

Trans Identifier:

Date Released:

User Released:

| Rate Grouping | Occ | SKL | Start Date | Stop Date | Status | HW | PN | CA | VA | VB |
|-------------------------|-----|---------------|------------|------------|--------|-----|-----|-----|-----|----|
| CARPENTER MASTER INDEP. | C | J - Journeyma | 02/01/2012 | 02/29/2012 | ACT | 160 | 160 | 160 | 160 | |
| CARPENTER MASTER INDEP. | C | J - Journeyma | 02/01/2012 | 02/29/2012 | ACT | 160 | 160 | 160 | 160 | |
| CARPENTER MASTER INDEP. | C | J - Journeyma | 02/01/2012 | 02/29/2012 | ACT | 44 | 44 | 44 | 44 | |
| CARPENTER MASTER INDEP. | C | J - Journeyma | 02/01/2012 | 02/29/2012 | ACT | 142 | 142 | 142 | 142 | |
| CARPENTER MASTER INDEP. | C | J - Journeyma | 02/01/2012 | 02/29/2012 | ACT | 160 | 160 | 160 | 160 | |
| CARPENTER MASTER INDEP. | C | J - Journeyma | 02/01/2012 | 02/29/2012 | ACT | 160 | 160 | 160 | 160 | |

View Summary Page

This screen totals the Funds due for each Occ/Skill and Totals All Funds.
Notice all View Details are checked

Work Report Editor - Windows Internet Explorer
http://10.10.200.125/v3prd/app

Employer: 000007-V3 PROD 7.24 TEST ER WORK AROUND Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND

Criteria

Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND Report Status: Initial Trans#: 3187713
 Member Count: 17 Row Count: 17 Report Source: Trans Type: 10 - Employer Report
 Date Received: 03/08/2012 Trans Identifier: 02/2012
 Date Released: User Released:

Work History Summary

 Show Hours: Show Funds: Show Contributions Due:

| | Rate Grouping | Job Category | Occupation | HW | PN | VA | VB | CA | AP | WP | IA | IP | WC | Sort | HW | PN | VA | VB | CA | AP | WP | IA | IP | WC | Funds Total |
|--|-------------------------|--------------------|------------|----|-----|-----|-----|-----|-----|-----|-----|----|----|-------|-------------|------------|------------|------------|------------|----------|---------|----------|--------|--------|-------------|
| | CARPENTER MASTER INDEP. | Carpenter Jrnyman | C | J | 946 | 946 | 946 | 946 | 946 | 946 | 946 | | | 1,300 | \$10,216.80 | \$8,608.60 | \$2,270.40 | \$1,513.60 | \$2,033.90 | \$681.12 | \$47.30 | \$274.34 | \$0.00 | \$0.00 | \$25,646.06 |
| | CARPENTER MASTER INDEP. | Carpenter CA or CS | C | A1 | | | | | | | | | | 500 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | CARPENTER MASTER INDEP. | Carpenter CA or CS | C | O1 | | | | | | | | | | 100 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | CARPENTER MASTER INDEP. | Carpenter CA or CS | C | A6 | | | | | | | | | | 100 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | CARPENTER MASTER INDEP. | Carpenter CA or CS | C | S | | | | | | | | | | 100 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | Totals | | | | 946 | 946 | 946 | 946 | 946 | 946 | 946 | 0 | 0 | 2,100 | \$10,216.80 | \$8,608.60 | \$2,270.40 | \$1,513.60 | \$2,033.90 | \$681.12 | \$47.30 | \$274.34 | \$0.00 | \$0.00 | \$25,646.06 |

Although you SAVED the report on the prior screen,
you have not actually transmitted the report into the Fund Office .
If the report balanced and you are in agreement with the totals to transmit the report
to the Fund Office to process you MUST click **“SUBMIT”**

Thursday, March 8, 2012 | Welcome USER NAME | I Want To: Account Settings | Logo

 **Carpenter Funds Administrative Office**
of Northern California, Inc. 000007 - V3 PROD 7.24 TEST ER WORK AROUND

Home » Employer Management » Reports, Billing History & Payments

Billing History

Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND | [New Work Report](#)

Work Reports

Report Status: Report Type:

Sort Columns View Row Records Print Export

| Inserted Date | Report Type | Report Status | Date Released | User Released | Work Month | Trans Identifier | Trans# | Total Due | Total Balance |
|---------------|-----------------|---------------|---------------|---------------|------------|------------------|---------|-------------|---------------|
| 02/22/2012 | Positive Report | Initial | | | 02/01/2012 | 02/2012 | 3187713 | \$54,266.16 | \$54,266.16 |

Once SUMBIT is clicked, a popup will ask you to confirm.

If yes, click "OK".

If you do not wish to SUBMIT click "cancel"

Home » Employer Management » Reports, Billing History & Payments

Billing History

Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND | [New Work Report](#)

Work Reports

Report Status: Report Type:

Message from webpage

Are you sure you want to submit the report? Once submitted the report can only be modified by contacting the Fund Office.

| Insert Date | Report | Status | | | | Total |
|-------------|-----------------|---------|--|------------|---------|---------|
| 02/22 | | | | | | 87713 |
| 02/22 | | | | | | 85214 |
| 02/17/2012 | Positive Report | Initial | | 11/01/2011 | 11/2011 | 3178916 |

You will be returned to the Work Reports screen. Notice that the “Initial” report is no longer visible. The report you just submitted will now in Prebill status.

Click “Generate Deposit Slip”

Thursday, March 8, 2012 | Welcome USER NAME

I Want To:

Account Settings | Logo



Carpenter Funds Administrative Office
of Northern California, Inc.

000007 - V3 PROD 7.24 TEST ER WORK AROUND

Home » Employer Management » Reports, Billing History & Payments

Billing History

Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND | [New Work Report](#)

Work Reports

Report Status:

Report Type:

| Inserted Date | Report Type | Report Status | Date Released | User Released | Work Month | Trans Identifier | Trans# | Total Due | Total Balance |
|---------------|-----------------|---------------|---------------|---------------|------------|------------------|---------|-------------|---------------|
| 02/22/2012 | Positive Report | Prebill | | | 02/01/2012 | 02/2012 | 3187713 | \$54,266.16 | \$54,266.16 |

Click "Logout"

Thursday, March 8, 2012 | Welcome USER NAME | I Want To: | Account Settings | **Logout**

 **Carpenter Funds Administrative Office**
of Northern California, Inc. 000007 - V3 PROD 7.24 TEST ER WORK AROUND

Home » Employer Management » Reports, Billing History & Payments

Billing History

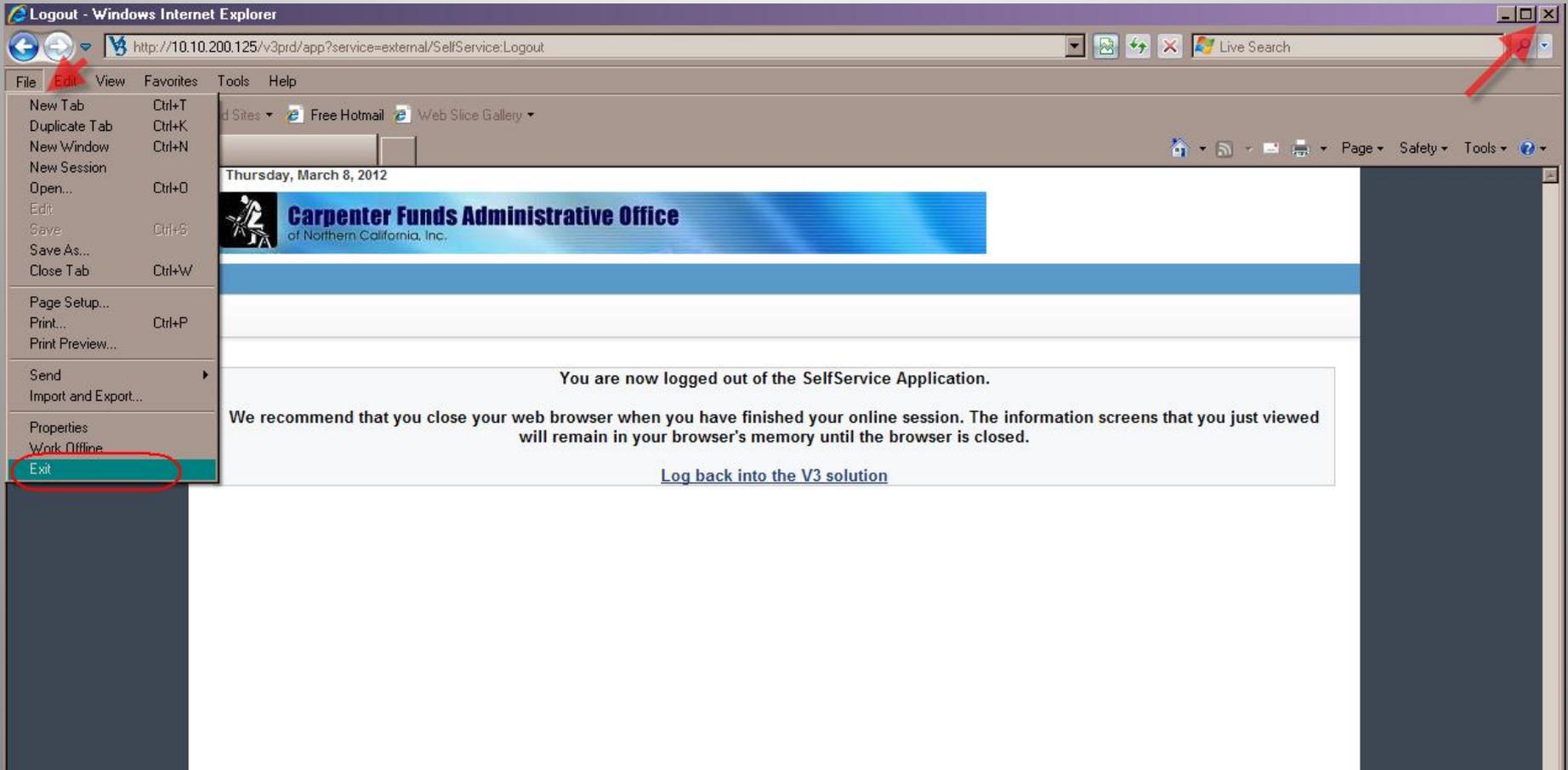
Access Account: 000007 V3 PROD 7.24 TEST ER WORK AROUND | [New Work Report](#)

Work Reports

Report Status: Report Type:

| Inserted Date | Report Type | Report Status | Date Released | User Released | Work Month | Trans Identifier | Trans# | Total Due | Total Balance |
|---------------|-----------------|---------------|---------------|---------------|------------|------------------|---------|-------------|---------------|
| 02/22/2012 | Positive Report | Prebill | | | 02/01/2012 | 02/2012 | 3187713 | \$54,266.16 | \$54,266.16 |

Exit the web browser.

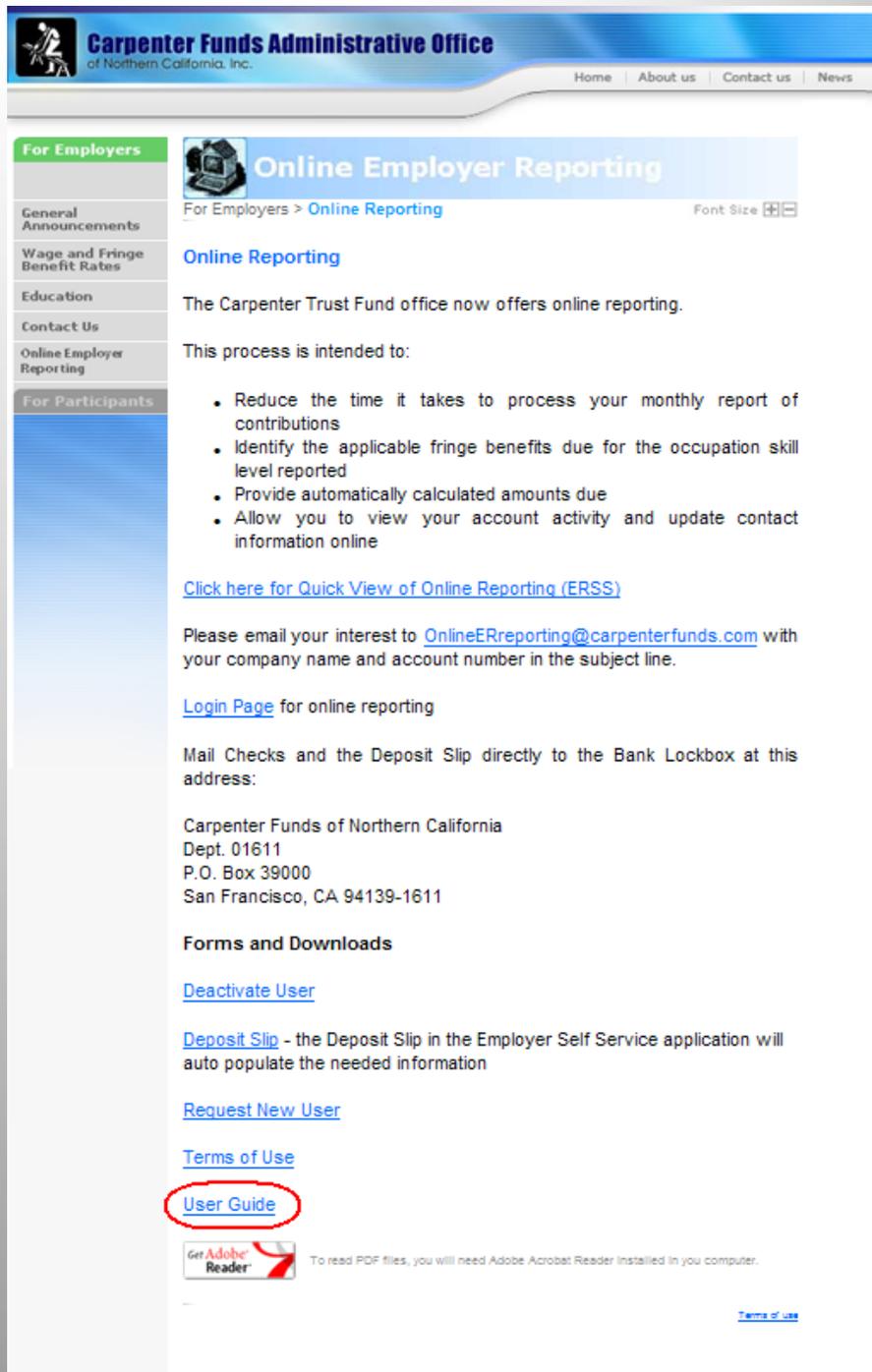


User Guide

This presentation is intended to demonstrate ERSS and is not a complete detailed “How To” for using this reporting method.

Refer to the complete *User Guide* available to download or open on the website:

<http://www.carpenterfunds.com>



The screenshot shows the website for the Carpenter Funds Administrative Office of Northern California, Inc. The page is titled "Online Employer Reporting" and is intended for employers. The navigation menu includes "For Employers", "General Announcements", "Wage and Fringe Benefit Rates", "Education", "Contact Us", "Online Employer Reporting", and "For Participants". The main content area includes a "Font Size" selector, a "Font Size" button, and a "Font Size" dropdown menu. The page text states: "The Carpenter Trust Fund office now offers online reporting. This process is intended to:" followed by a bulleted list of benefits: "Reduce the time it takes to process your monthly report of contributions", "Identify the applicable fringe benefits due for the occupation skill level reported", "Provide automatically calculated amounts due", and "Allow you to view your account activity and update contact information online". Below the list is a link: "Click here for Quick View of Online Reporting (ERSS)". The page also includes contact information: "Please email your interest to OnlineERreporting@carpenterfunds.com with your company name and account number in the subject line." and "Login Page for online reporting". The mailing address is: "Mail Checks and the Deposit Slip directly to the Bank Lockbox at this address: Carpenter Funds of Northern California, Dept. 01611, P.O. Box 39000, San Francisco, CA 94139-1611". The page also has sections for "Forms and Downloads" with links for "Deactivate User", "Deposit Slip", "Request New User", "Terms of Use", and "User Guide" (circled in red). At the bottom, there is a "Get Adobe Reader" button and a note: "To read PDF files, you will need Adobe Acrobat Reader installed in your computer." and a "Terms of Use" link.