

Employer Self-Service User Guide

Contents

1: Login to Application.....	2
Login to Employer Self Service	2
Logout of Employer Self Service	4
Change Email.....	5
2: User Management.....	7
Add an Employer User	7
Update an Employer User.....	13
Delete Employer User.....	18
3: View/Edit Member Info in ESS.....	19
View Member Information	19
Edit Member Information	23
4: Setup New Member	28
Add a New Member.....	28
5: Update Billing Reports	34
Update Billing Reports in Employer Self Service	34
View Member Contacts in Employer Self Service.....	39
View Payment History in Employer Self Service	40
View Transactions in Employer Self Service	41
6: View/Update Employer Information	42
View/Update Employer Information	42
View/Add Employer Contacts.....	45
7: View/Update Billing Location Info	46
View/Update Billing Location Information.....	46
View/Add Employer Billing Contacts.....	49
8: Import Files.....	52
Import Files.....	52
9: News & Billing Alerts	59
View Alerts.....	59

1: Login to Application



The Purpose of this Exercise is to illustrate how to login to the Employer Self-Service application.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

Login to Employer Self Service


1. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

A screenshot of the Amalgamated Life login page. At the top left, it says "Friday, January 22, 2010". The Amalgamated Life logo is on the left, with the text "Amalgamated Life" and "America's Labor Insurance Company®" below it. A dark green horizontal bar spans the width of the page. In the center, there is a login form with two input fields: "User:" and "Password:". Below the fields is a "Log In" button, which is circled in red. At the bottom right of the page, the slogan "we work for working people" is displayed.

2. After successfully logging in, the ESS Home page displays. The following areas/features are available:
 - Employer Management
 - Member Management
 - Import Files

- Administration Functions

Friday, January 22, 2010 | Welcome [Redacted] | Want To: [Dropdown] | Account Settings | Logout



Amalgamated Life
America's Labor Insurance Company®

[Redacted] [Change Employer]

Home

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

Employer Management

- [View/Update Employer Information](#)
- [View/Update Billing Location Information](#)
- [Review Employer Reports, Billing History & Payments](#)

Members for Your Employer

- [View/Update Member Information](#)
- [Process a New Hire Member](#)


Import Files

- [Import New System Data](#)

Administration Functions

- [View/Update User Information](#)

News and Alerts



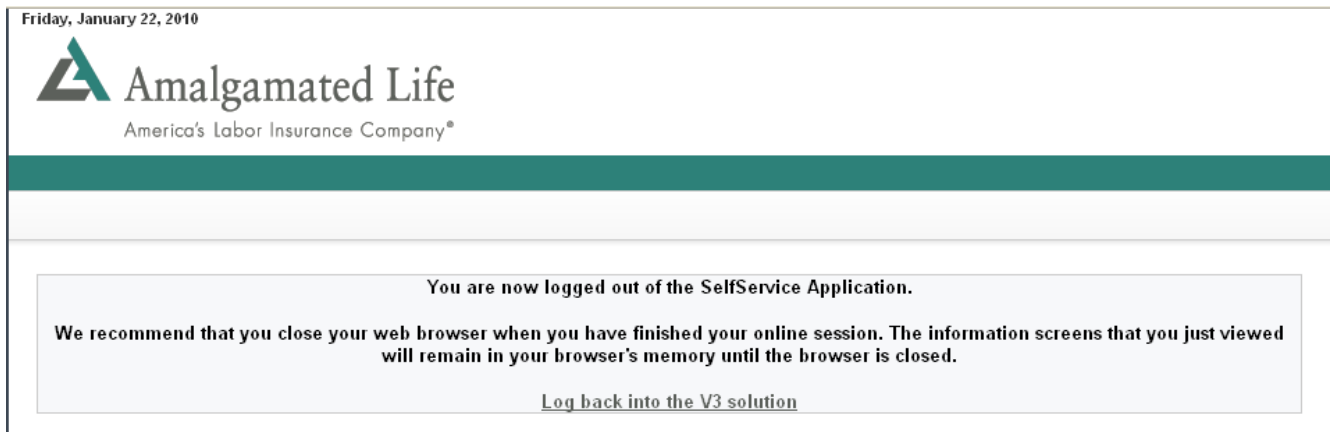
we work for working people

Logout of Employer Self Service

3. To logout of Employer Self Service, click on the 'Logout' button.




4. The logout confirmation page is displayed indicating that you have logged out of the Self-Service Application. To log in again, click the 'Log Back into the ESS solution' link.



Change Email

5. To change or reset your Employer Self-Service system password, return to the Login page and enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



Amalgamated Life
America's Labor Insurance Company®

User:

Password:

[Log In](#)

we work for working people

6. Click on the 'Account Settings' link in the upper right hand corner.

Friday, January 22, 2010 | Welcome [Redacted]

I Want To: [Dropdown] [Account Settings](#) Logout




Amalgamated Life
America's Labor Insurance Company®

[Redacted] [Change Employer]

Home

7. The Account Settings page is displayed. From this page you can change your email address. Click 'Save' when finished.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

 **Amalgamated Life**
America's Labor Insurance Company® [Redacted] [Change Employer]

Home » Administration Functions » Update Account Settings

Account Settings


In order to change your email, please check the Reset Email checkbox below in order to enable the corresponding fields to be editable. After entering the appropriate information, please hit "Save".

User: [Redacted]

Reset Email

Enter Email Address:

Re-enter Email Address:

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2: User Management




The Purpose of this Exercise is to illustrate how to manage users in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

Add an Employer User

1. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



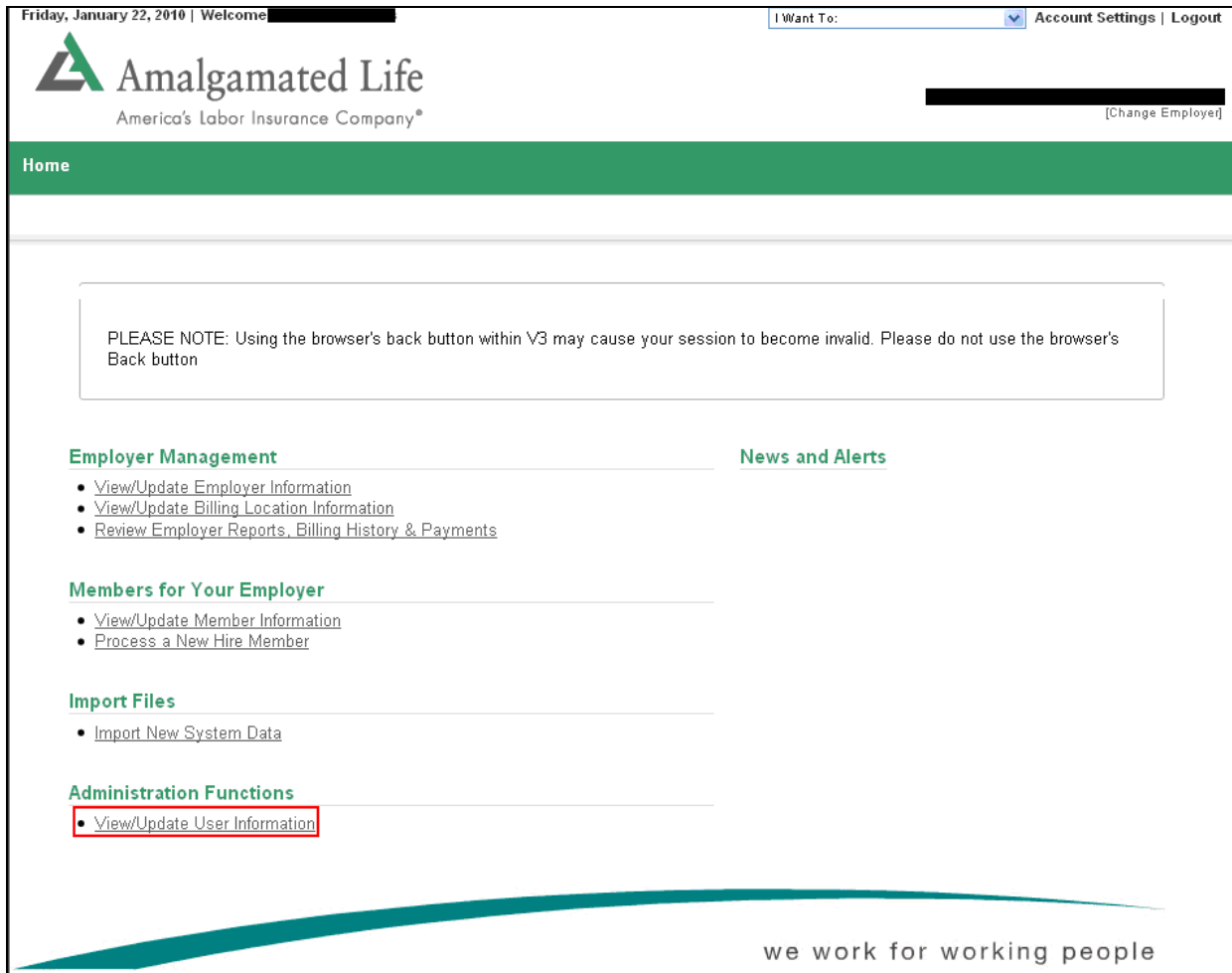
Amalgamated Life
America's Labor Insurance Company®

User:

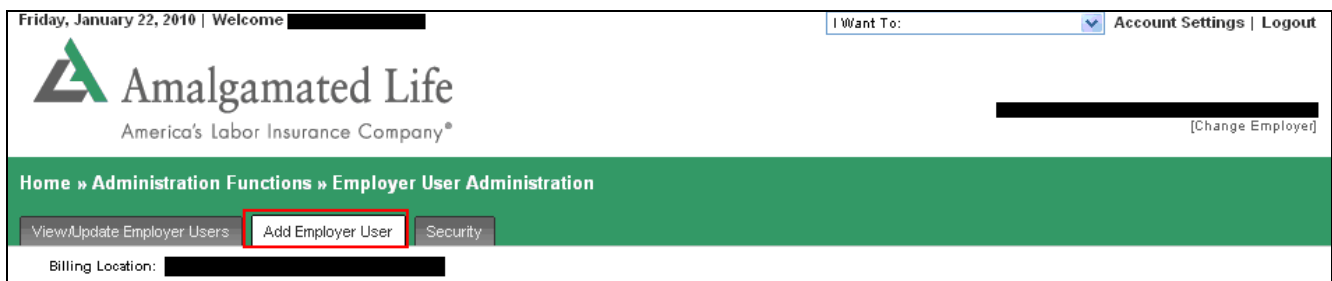
Password:

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- From the Employer Self-Service Home page, click on the 'View/Update User Information' link under the Administration Functions section.



- The Employer User Administration screen is displayed. To add a user, click the "Add Employer User" tab.



- The Add Employer User screen is displayed. If the user already exists in ESS, but you want to add this person as a new Employer User you can search for the user by First Name, Last Name, or SSN by entering it in the search box, then clicking the 'Search' button.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Administration Functions » Employer User Administration

View/Update Employer Users | Add Employer User | Security

Billing Location: [Redacted]

Please enter the name or SSN of the person that will be responsible for the security user account that you are creating. If you would like to create a new user, please click [here](#).

Select Person

Person:

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- The system will retrieve a list of relevant matches based on the information entered. Select the user you wish to add from the results list.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Administration Functions » Employer User Administration

View/Update Employer Users | Add Employer User | Security

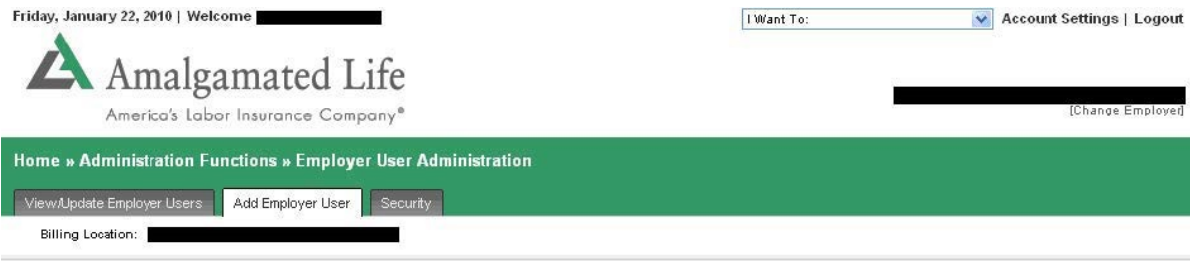
Billing Location: [Redacted]

Search Results

User Name	Ssn	Sort Name	First Name	Last Name
[Redacted]	[Redacted]	PANELLA, JUDY	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

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- The system will display a message indicating that the user's existing account has been found. Click 'Yes' to confirm.



Existing Account Found

User: [Redacted] Person: [Redacted]

This person already has an existing login account to a different application. Would you like to merge with this account and grant additional access?



- The system will briefly display a message that the user has been successfully added.

Add Successful

The employer user has been successfully added.

- The screen will then refresh with the user information now displayed in the Employer Contacts list.


Employer Contacts

|

User	User	UserId	Status
[Redacted]	[Redacted]	[Redacted]	Active
[Redacted]	[Redacted]	[Redacted]	Active
[Redacted]	[Redacted]	[Redacted]	Active
[Redacted]	[Redacted]	[Redacted]	Active
[Redacted]	[Redacted]	[Redacted]	Active
[Redacted]	[Redacted]	[Redacted]	Active
[Redacted]	[Redacted]	[Redacted]	Active

9. If you wish to add a new Employer User that does not already exist in the system, click on the text link on the Add Employer User screen.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout



Amalgamated Life
America's Labor Insurance Company®

[Redacted] [Change Employer]

Home » Administration Functions » Employer User Administration

View/Update Employer Users | Add Employer User | Security

Billing Location: [Redacted]

Please enter the name or SSN of the person that will be responsible for the security user account that you are creating. If you would like to create a new user, please click [here](#).

Select Person

Person:

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10. The New User page is displayed. Enter all required information. Then click 'Submit'.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Redacted] [Change Employer]

Home » Administration Functions » Employer User Administration

View/Update Employer Users | Add Employer User | Security

Billing Location: [Redacted]

All fields are required. The password is case sensitive.

New User

User: [Redacted]

Password: [Redacted]

Confirm Password: [Redacted]

Type: Administrative [Dropdown]

Reset Password Flag:

Look Account:

Workflow Access:

Title: [Redacted]

SSN: [Redacted]

Prefix: [Dropdown]

First Name: Test [Redacted]

Middle Name: [Redacted]

Last Name: User [Redacted]

Suffix: [Dropdown]

Date of Birth: 01/01/1970 [Calendar]

Sex: Female Male

Business Entity List

Name	Type
[Redacted]	Accounts Receivable [Dropdown]

Address Information

Add Copy Stop Print

Address Type: Residence [Dropdown] Valid:

Address Period: Jan 22, 2010 [Dropdown] Address Source: Member [Dropdown]

Address 1: [Redacted]

Address 2: [Redacted]

Address 3: [Redacted]

Country: US [Dropdown] Zip: [Redacted]

City: [Redacted]

State: [Redacted]

County: [Redacted]

Contact Details

Phone Subtype	Country	Phone	Ext	Primary
Home [Dropdown]	US [Dropdown]	[Redacted]	[Redacted]	<input type="checkbox"/>
Cellphone [Dropdown]	US [Dropdown]	[Redacted]	[Redacted]	<input type="checkbox"/>

Email Subtype	Email	Primary
Primary [Dropdown]	[Redacted]	<input type="checkbox"/>

Submit Cancel

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11. The system will briefly display a message that the user has been successfully added.

Add Successful

The employer user has been successfully added.

14. The User Details page is displayed. From here you can edit User Details, Address Information, Contact Information, Applications, Business Entities, User Groups, and Subscriptions.

User Details

User: [Redacted]

Password: ***** (Change)

Type: Administrative

Reset Password Flag:

Lock Account:

Workflow Access:

Title: [Redacted]

SSN: [Redacted]

Prefix: [Redacted]

First Name: Test

Middle Name: [Redacted]

Last Name: User

Suffix: [Redacted]

Date of Birth: [Redacted]

Sex: Female Male

Application

Application	Suspended
Employer Self Service	<input type="checkbox"/>

Business Entity List

Controls	
Name	Type
[Redacted]	Accounts Receivable

User Groups

Employer Self Service [Add] [Delete]

Controls	
Department Name	Priority
Employer User *	100

* Universal Role

Subscriptions

Controls	
Display Name	
<input checked="" type="checkbox"/>	News

Address Information

[Add] [Copy] [Stop] [Print]

Address Type: Residence Valid:

Address: Jan 22, 2010 - Address Source: Member

Address 1: [Redacted]

Address 2: [Redacted]

Address 3: [Redacted]

Country: US Zip: [Redacted]

City: [Redacted]

State: [Redacted]

County: [Redacted]

Contact Information

Phone

Subtype	Country	Phone	Ext	Primary
Home	US	[Redacted]	[Redacted]	<input type="checkbox"/>

Email

[Save] [Delete]

15. The User Details section allows you to change or reset the user's password, lock the user's account in order to prohibit access, and enable/disable access to the Workflow application.

User Details

User: [Redacted]

Password: ***** (Change)

Type: Administrative

Reset Password:

Flag:

Lock Account:

Workflow Access:

Title: [Redacted]

SSN: [Redacted]

Prefix: [Redacted]

First Name: Test

Middle Name: [Redacted]

Last Name: User

Suffix: [Redacted]

Date of Birth: [Redacted]

Sex: Female Male

16. The Address Information section allows you to perform the following:

- Clicking on the 'Add' button will enable you to create a new address for the member.
- Clicking on the 'Copy' button will automatically end the current address period, and starts a new address record with the existing address information which can then be modified as needed.
- Clicking on the 'Stop' button automatically puts a stop date on an existing address.
- Clicking on the 'Print' button enables you to print the user's address information for an envelope or mailing label.

Address Information

Add Copy Stop Print

Address Type: Residence Valid:

Address Period: Jan 22, 2010 - Address Source: Member

Address 1: [Redacted]

Address 2: [Redacted]

Address 3: [Redacted]

Country: US Zip: [Redacted]

City: [Redacted]

State: [Redacted]

County: [Redacted]

17. The Contact Information allows you to store the user’s contact information such as a home, mobile, or other phone number. Click on the ‘+’ symbol next to the Phone or Email section to add a new phone/email record. Click on the ‘x’ symbol to delete the phone/email record.

Contact Information

Phone +

Subtype	Country	Phone	Ext	Primary	
Home	US	[Redacted]	[Empty]	<input type="checkbox"/>	x

Email +

18. The Application section allows user access to be suspended by specific application(s).

Application

Application	Suspended
Employer Self Service	<input type="checkbox"/>

19. The Business Entity List section allows you to assign the user’s title within the business entity.

Business Entity List

+ Controls

Name	Type
[Redacted]	Audit

20. The User Groups Section allows you to assign the user to a user group. Security privileges are assigned to the group thereby eliminating the need to assign security to each user individually

User Groups

Employer Self Service Add Delete

+ Controls

Department Name	Priority
Employer User *	100

* Universal Role

21. The Subscriptions section is where you can opt-in the user to receive news or other alerts.

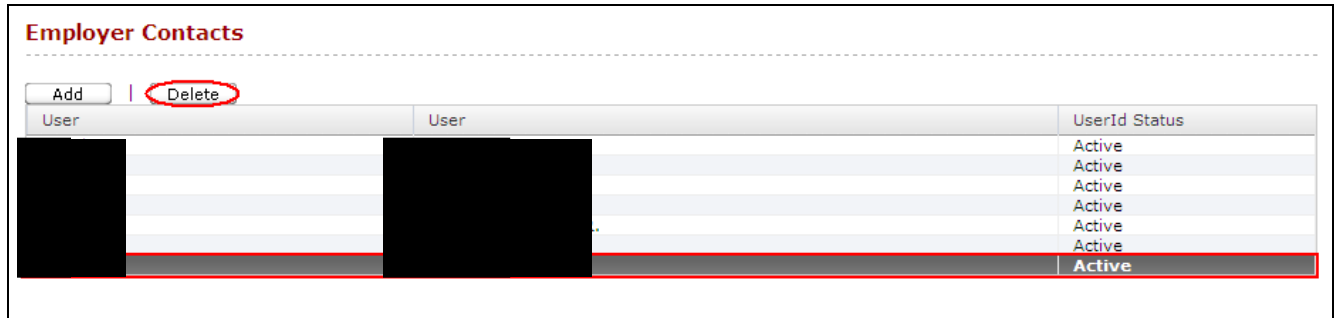


22. Once you have finished updating the user, click the 'Save' button.

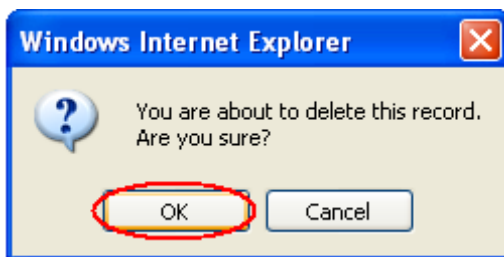


Delete Employer User

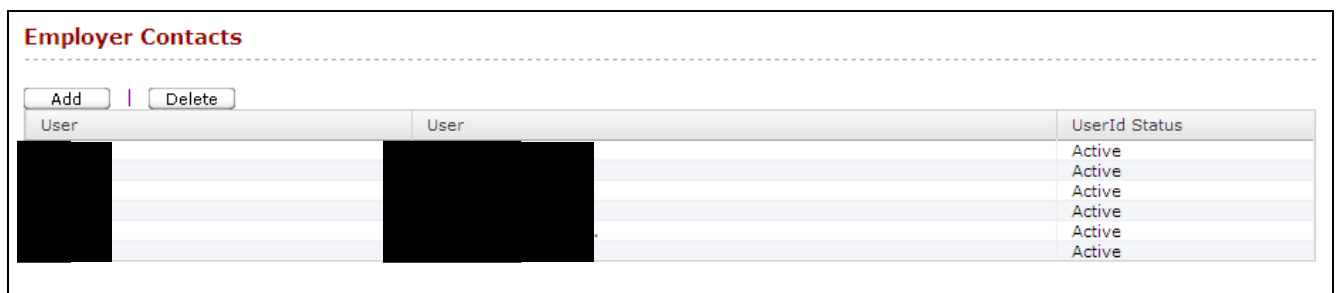
23. To delete a user, click on their username in the Employer Contacts list, then click the 'Delete' button.



24. A delete confirmation pop-up window is displayed. Click 'OK'.



25. The screen refreshes and the user is no longer displayed in the list.



3: View/Edit Member Info in ESS

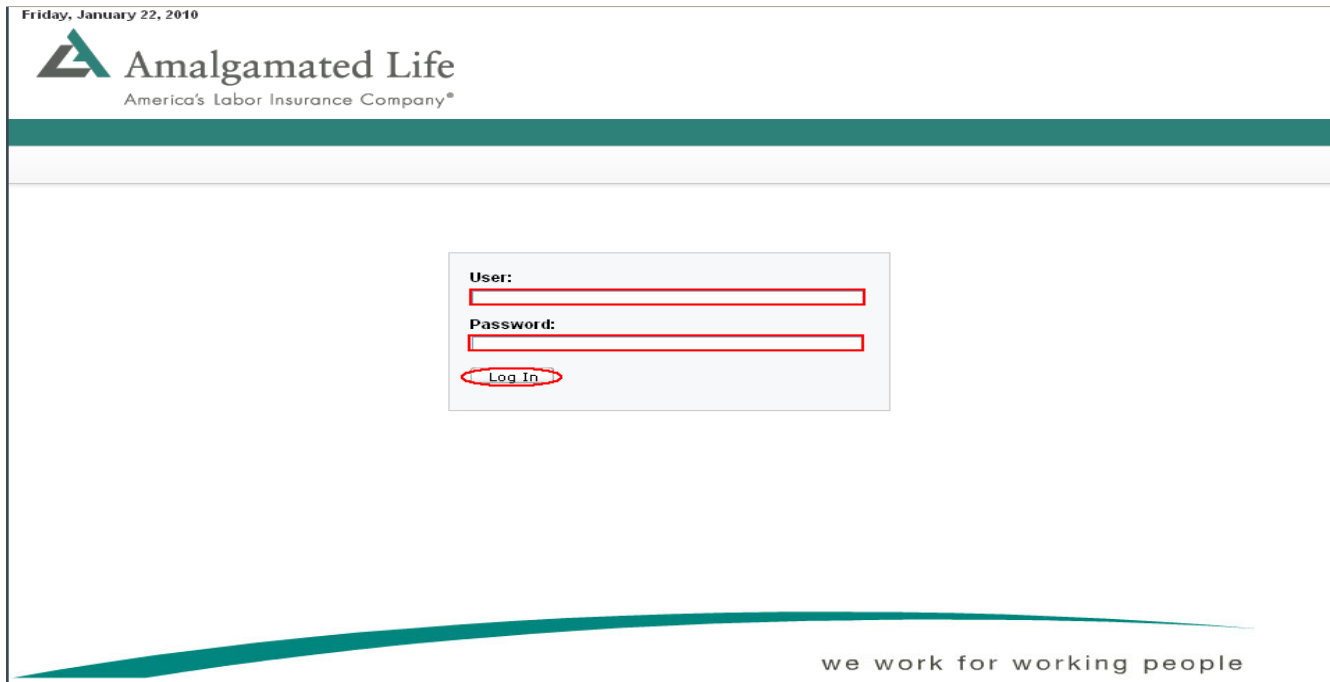


The Purpose of this Exercise is to illustrate how to view and edit Member information in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

View Member Information

1. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.



Friday, January 22, 2010

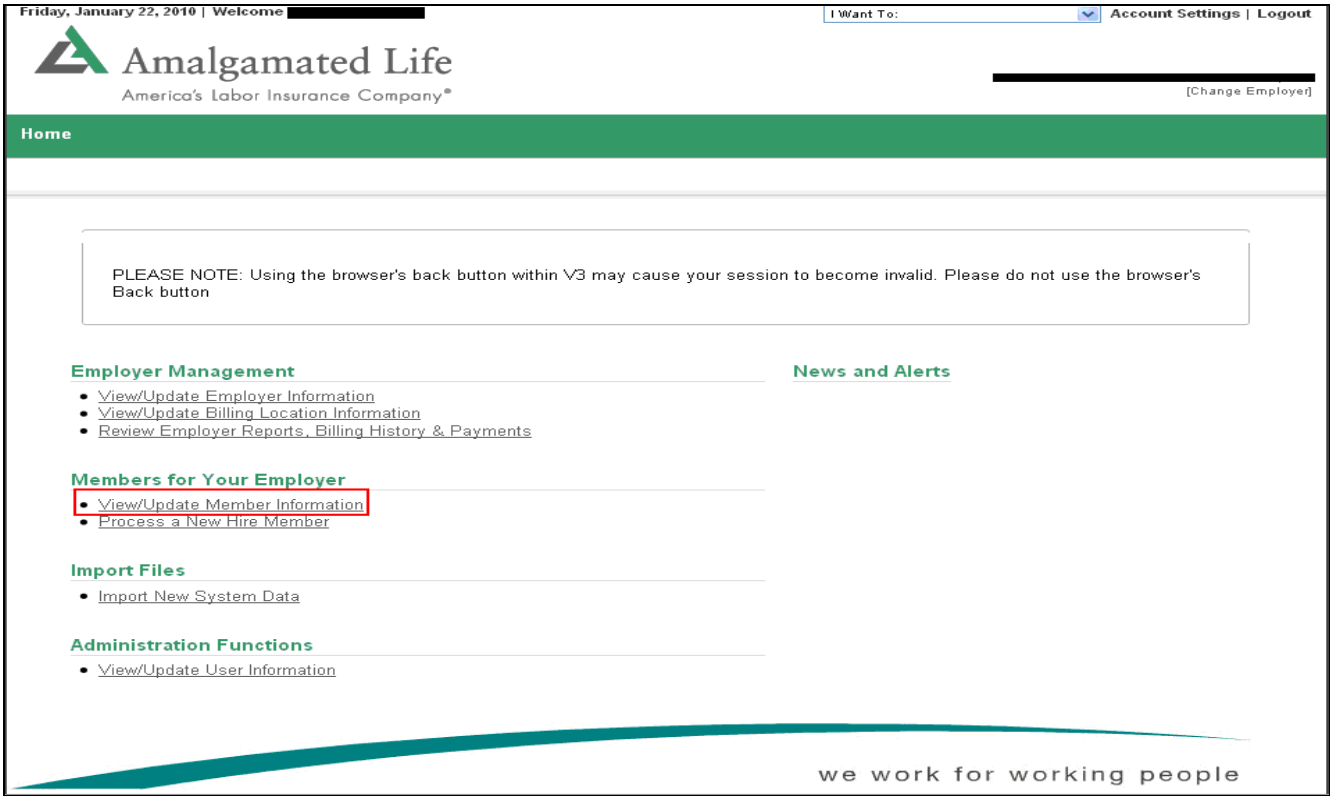
 **Amalgamated Life**
America's Labor Insurance Company®

User:

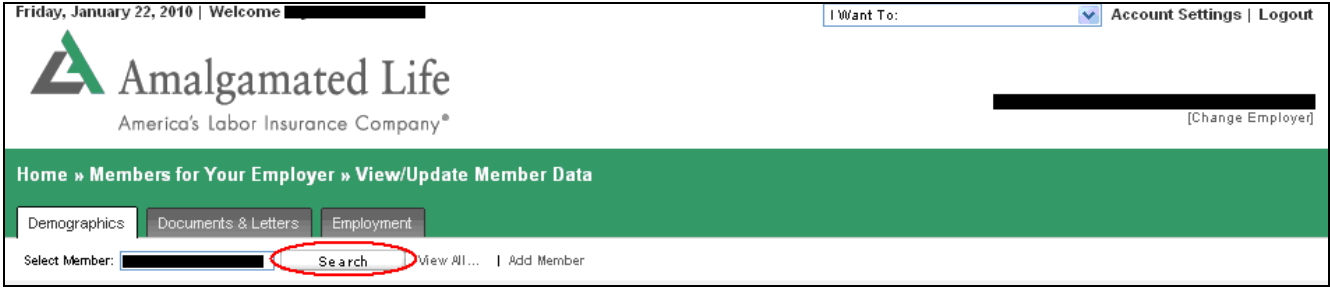
Password:

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- 2. From the Home page, click on the 'View/Update Member Information' link under the Members for Your Employer section.



- 3. Search for the member you wish to view by entering an SSN, First Name or Last Name, then click the 'Search' button.



4. The Member Demographics page is displayed. Here you can edit Member Information, Additional Information, Address, and Contact Information.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Redacted] [Change Employer]

Home » Members for Your Employer » View/Update Member Data

Demographics | Documents & Letters | Employment

Employee/Member: [Redacted] (New Search) | SSN: [Redacted] (Add Member)

Member Information

SSN: [Redacted] | Prefix: [Dropdown] | First Name: [Redacted] | Middle Name: [Redacted] | Last Name: [Redacted] | Suffix: [Dropdown]

Date of Birth: [Redacted] [Calendar] | Gender: Female Male | Date of Death: [Redacted] [Calendar]

Person Id: [Redacted] | Age: [Redacted] [Calendar]

Enrollment Complete?

Additional Information

Marital Status: [Unknown] [Dropdown] | Marriage Date: [Redacted] [Calendar]

Divorce Date: [Redacted] [Calendar] | Member Start Date: [Redacted] [Calendar]

Retirement Date: [Redacted] [Calendar] | Primary Employer: [Redacted]

Disabled: | SSA Disability Date: [Redacted] [Calendar]

Local: [Redacted] [Dropdown] | Insurance Date: [Redacted] [Calendar]

Address

[Add] [Copy] [Stop] [Print]

Address Type: [Residence] [Dropdown] | Valid: | Address Source: [Member] [Dropdown]

Address Period: [Nov 3, 2009 -] [Dropdown] | Address Source: [Member] [Dropdown]

Address 1: [Redacted] | Address 2: [Redacted] | Address 3: [Redacted]

Country: [Redacted] [Dropdown] | Zip: [Redacted] [Dropdown]

City: [Redacted] | State: [Redacted] [Dropdown] | County: [Redacted] [Dropdown]

Contact Information

Phone

Subtype	Country	Phone	Ext	Primary	
[Home] [Dropdown]	[US] [Dropdown]	[Redacted]	[Redacted]	<input type="checkbox"/>	[X]

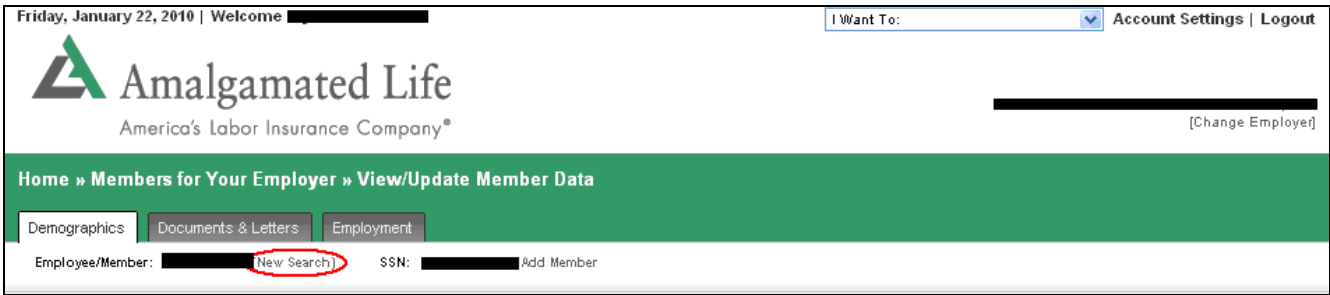
Email [Redacted] [Dropdown]

Web Address [Redacted] [Dropdown]

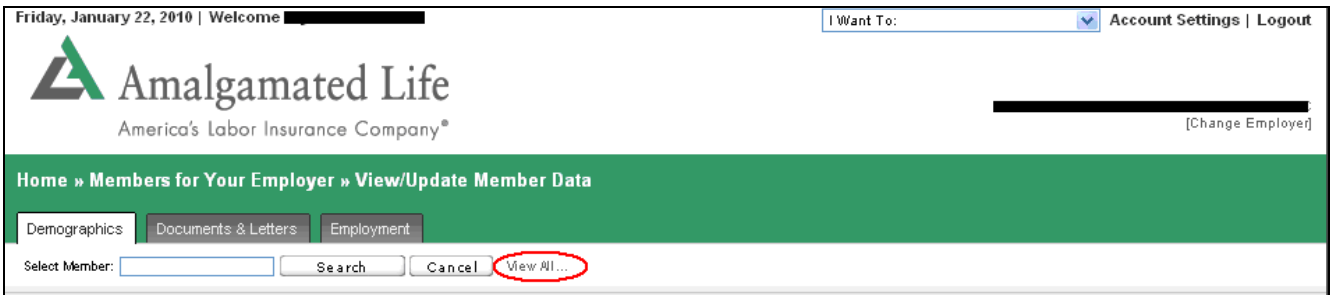
[Save] [Reset]

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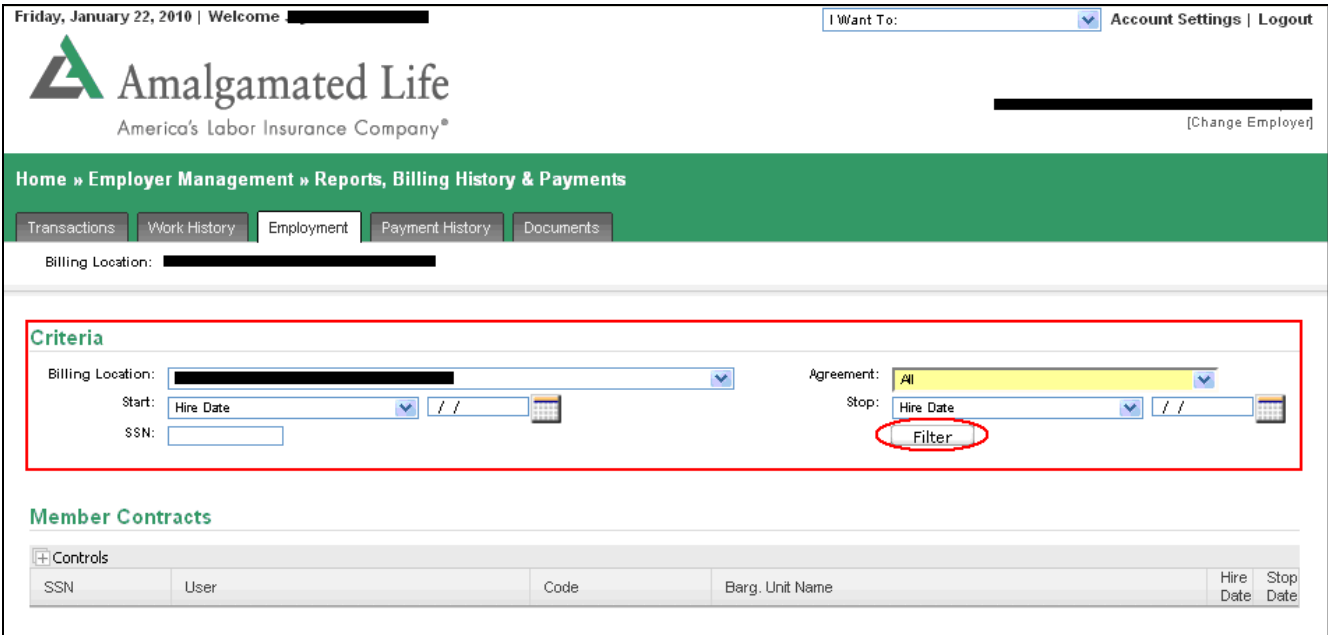
5. To view a list of all Members, click on “New Search” link which provides “View All” link.



6. Click on “View All” link to see all the members for the employer.



7. On the next screen, you can specify which Members should be returned on the list by selecting your desired filter criteria such as Billing Location and Start/Stop Dates. Click the ‘Filter’ button once all criteria have been selected.



8. The Member list is displayed based on the filter criteria specified.

Member Contracts

Controls					
SSN	User	Code	Barg. Unit Name	Hire Date	Stop Date
		115516000	CHICAGO WESTIN HOTEL	11/02/2009	//
		16000		11/01/2009	11/01/2009
		16000		01/01/1990	12/31/2008
		16000		05/27/2003	08/31/2009
		16000		05/27/2003	08/31/2009
		16000		02/01/2010	//
		16000		06/17/2008	//
		16000		10/12/2004	12/09/2006
		16000		08/01/2009	//
		16000		08/01/2009	//
		16000		11/24/2004	08/31/2009
		16000		05/31/2000	//
		16000		11/01/2009	//
		16000		10/01/2009	//
		16000		05/31/2000	11/30/2001
		16000		10/12/2004	08/31/2009
		16000		10/29/2005	//
		16000		07/31/2000	08/31/2009
		16000		04/17/2002	08/31/2009
		16000		07/30/2004	08/31/2009
		16000		04/15/2003	04/01/2004
		16000		03/20/2003	12/04/2005
		16000		08/26/2000	//
		16000		06/26/2000	08/31/2009
		16000		01/01/1990	//
		16000		01/01/1998	//
		16000		06/17/2006	//
		16000		05/14/2003	08/31/2009
		16000		03/21/2001	08/31/2009
		16000		11/02/2009	//
		16000		11/01/2009	11/01/2009
		16000		11/11/2003	//
		16000		05/23/2000	08/31/2009
		16000		09/16/2006	//
		16000		05/09/2005	04/06/2006
		16000		01/27/2001	//
		16000		09/27/2000	08/31/2009
		16000		05/25/2000	08/31/2009
		16000		09/18/2008	//
		16000		06/12/2000	04/01/2004
		16000		06/12/2000	//
		16000		10/02/2002	10/02/2006
		16000		11/10/2004	//
		16000		08/15/2008	//
		16000		11/24/2002	12/31/2004
		16000		05/29/2006	//
		16000		05/05/2006	//
		16000		07/09/2001	03/16/2002
		16000		10/06/2003	08/22/2006
		16000		07/31/2000	//

Page 1 of 6 Rows: 1 - 50 of 266

9. To view or update details for a specific member, select the desired member from the list. A pop-up window appears below and you can click on the ‘Member’ option to open the Member record for viewing/updating.

				HOTEL	03/20/2003	12/04/2005
				HOTEL	08/26/2000	//
				HOTEL	06/26/2000	08/31/2009
				HOTEL	01/01/1990	//
				HOTEL	01/01/1998	//
				HOTEL	06/17/2006	//
				HOTEL	05/14/2003	08/31/2009
				HOTEL	03/21/2001	08/31/2009
				HOTEL	11/02/2009	//
				HOTEL	11/01/2009	11/01/2009

Member
 Member Employment
 Member Enrollment

Edit Member Information

10. In the Member Information section, you can edit general details such as the member’s SSN, first or last name, birth/death dates, and gender.

The screenshot shows the 'Member Information' section of a web form. It includes fields for SSN, Prefix, First Name, Middle Name, Last Name, and Suffix. There are also fields for Date of Birth, Gender (with radio buttons for Female and Male), Date of Death, Age, Person Id, and an Enrollment Complete? checkbox.

11. In the Additional Information section you can enter marital status and dates, disability status and dates, as well as an insurance date.

The screenshot shows the 'Additional Information' section of a web form. It includes fields for Marital Status, Marriage Date, Divorce Date, Member Start Date, Retirement Date, Primary Employer, Disabled checkbox, SSA Disability Date, Local dropdown, and Insurance Date.

12. The Address section contains buttons which allow you to Add, Copy, Stop, and Print address information.

13. To add a new address record for the member, click on the ‘Add’ button. Enter the new address information into the pop-up window and then click ‘OK’ to save the record when done.

The screenshot shows the 'Address' section of a web form. It features buttons for 'Add', 'Copy', 'Stop', and 'Print'. Below these are fields for Address Type, Address Period, Valid checkbox, Address Source, Address 1, Address 2, Address 3, Country, City, State, and County. The 'Add' button is highlighted with a red box.

14. To copy an address into a new record, click on the ‘Copy’ button. Using the copy button will automatically place a stop date on the current address record, and begin a new address record with the same information that can be edited as desired.

The screenshot shows the 'Address' form with the following fields and values:

- Buttons: Add, Copy (highlighted in red), Stop, Print
- Address Type: Payment (dropdown)
- Valid:
- Address Period: Nov 6, 2009 - (dropdown)
- Address Source: Member (dropdown)
- Address 1: [Redacted]
- Address 2: [Redacted]
- Address 3: [Redacted]
- Country: [Redacted] (dropdown)
- Zip: [Redacted]
- City: [Redacted]
- State: [Redacted] (dropdown)
- County: [Redacted] (dropdown)

15. To inactivate a member address, click on the ‘Stop’ button. The system will automatically populate the stop date field on the address record with the current date. Note that the Address Period field changes from “Nov 2, 2009 –” to “Nov 2, 2009 – Nov 3, 2009”. Also, the ‘Valid’ checkbox becomes unchecked after the address is stopped to indicate the address is no longer valid.

The screenshot shows the 'Address' form with the following fields and values:

- Buttons: Add, Copy, Stop, Print
- Address Type: Payment (dropdown)
- Valid:
- Address Period: Nov 6, 2009 - (dropdown, highlighted in red)
- Address Source: Member (dropdown)

(Above: Before stopping the member address)

The screenshot shows the 'Address' form with the following fields and values:

- Buttons: Add, Copy, Stop, Print
- Address Type: Payment (dropdown)
- Valid:
- Address Period: Nov 6, 2009 - Jan 21, 2010 (dropdown, highlighted in red)
- Address Source: Member (dropdown)

(Above: After stopping the member address)

16. To print a member’s address information on an envelope or mailing label, click the ‘Print’ button. A print preview is displayed. You can adjust the font and/or envelope size by using the drop-down menus below. To initiate printing, press ‘Print’.

Delivery Address:

TEST MEMBER
23 E. 57TH ST. #6B
NEW YORK, NY 10016

Font Size: 12 Envelope Size: Envelope #10 41/8 x 91/2

Print
Cancel

17. The Contact Information section allows you to add or remove Phone, Email, and Website address information.

18. For example, to add a new phone number, click the '+' symbol in the Phone row.

Contact Information

Phone	+
Email	+
Web Address	+

19. Select the desired subtype (Home or Cell Phone) and then enter the number. Additional numbers can be added by clicking on the '+' symbol multiple times. Click 'Save' when done to save the member information changes.

Phone	+				
Subtype	Country	Phone	Ext	Primary	
Home	US			<input type="checkbox"/>	X

20. To delete an item, click the 'X' symbol in the row next to the item you wish to delete.

Phone	+				
Subtype	Country	Phone	Ext	Primary	
Home	US			<input type="checkbox"/>	X

21. When you are done making all desired Member Information changes, click the 'Save' button. If you wish to undo a change before saving it, click the 'Reset' button.



4: Setup New Member




The Purpose of this Exercise is to illustrate how to setup a new member in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

Add a New Member

1. Log into the Employer Self-Service application.

Friday, January 22, 2010



Amalgamated Life
America's Labor Insurance Company®

User:

Password:

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2. From the Home page, click on View/Update Member Information.

Friday, January 22, 2010 | Welcome [redacted] | I Want To: [dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [redacted] [Change Employer]

Home

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

Employer Management

- [View/Update Employer Information](#)
- [View/Update Billing Location Information](#)
- [Review Employer Reports, Billing History & Payments](#)

Members for Your Employer

- [View/Update Member Information](#)
- [Process a New Hire Member](#)

Import Files

- [Import New System Data](#)

Administration Functions

- [View/Update User Information](#)

News and Alerts

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3. To add a new member, click the “Add Member” link.

Friday, January 22, 2010 | Welcome [redacted] | I Want To: [dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [redacted] [Change Employer]

Home » Members for Your Employer » View/Update Member Data

Demographics | Documents & Letters | Employment

Select Member: [input] [Search] [View All...] [Add Member]

- Enter the new member's indicative information in the Member Information section. When creating a new member account, you must include the member's SSN, First Name, and Last Name.

Friday, January 22, 2010 | Welcome [Redacted] | Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Redacted] [Change Employer]

Home » Members for Your Employer » Process New Hire

Demographics | Employment

Billing Location: [Redacted]

Messages(1)
Creating new member.

Member Information

SSN: [Redacted] Prefix: [Dropdown] First Name: [Text: Test] Middle Name: [Text] Last Name: [Text: Member] Suffix: [Dropdown]

Date of Birth: [Calendar] Gender: Female Male Date of Death: [Calendar] Age: [Text]

Person Id: [Text] Enrollment Complete?:

Address Information

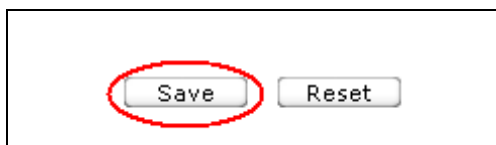
Address Type: [Dropdown: Residence] Valid: Address Period: [Dropdown: Jan 22, 2010 -] Address Source: [Dropdown: Member]

Address 1: [Text] Address 2: [Text] Address 3: [Text]

Country: [Dropdown: US] Zip: [Text] City: [Text] State: [Dropdown] County: [Dropdown]


Save **Reset**

- Click 'Save' to save the new member record.



6. The system will automatically switch to the Employment tab so that you can create a new Member Employment Record. Enter all indicative information, then click 'Save' to save the Employment Record.

Friday, January 22, 2010 | Welcome [REDACTED] | I Want To: [REDACTED] Account Settings | Logout

 **Amalgamated Life**
America's Labor Insurance Company® [REDACTED] [Change Employer]

Home » Members for Your Employer » Process New Hire

Demographics | **Employment**

Billing Location: [REDACTED]

New Hire Employment

Barg. Unit Name: [REDACTED] ▼

Hire Date: 12/26/2009 [Calendar]

Stop Date: / / [Calendar]

Eligibility Change Reason: New Employee/Hire ▼

Eligibility Status: Benefits Eligible ▼

Eligibility Begin Date: 01/01/2010 [Calendar]

Eligibility End Date: / / [Calendar]

Job Category: Eligible Employee ▼

Job Class: Assistant ▼

Job Site: [REDACTED] ▼

Credit Flag:

7. A message is displayed stating that the member and employment record have been saved.

Friday, January 22, 2010 | Welcome [redacted] | I Want To: [dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Change Employer]

Home » Members for Your Employer » View/Update Member Data

Demographics | Documents & Letters | Employment

Employee/Member: (New Search) SSN: XXX-XX-4447 | Add Member

Messages(1)
The member and employment record have been saved.

Member Information

SSN: [redacted] Prefix: [dropdown] First Name: Test Middle Name: Last Name: Member Suffix: [dropdown]

Date of Birth: [calendar] Gender: Female Male Date of Death: [calendar]

Person Id: [input] Age: [calendar]

Enrollment Complete?:

Additional Information

Marital Status: [dropdown] Married Marriage Date: [calendar]

Divorce Date: [calendar]

Member Start Date: [calendar]

Retirement Date: [calendar]

Primary Employer: [input]

Disabled:

SSA Disability Date: [calendar]

Local: [dropdown]

Insurance Date: [calendar]

Address

Add Copy Stop Print

Address Type: [dropdown] Residence Valid:

Address Period: [dropdown] Jan 22, 2010 - Address Source: [dropdown] Member

Address 1: [input]

Address 2: [input]

Address 3: [input]

Country: [dropdown] US Zip: [input]

City: [input]

State: [dropdown]

County: [dropdown]

Contact Information

Phone [input] [icon]


Email [input] [icon]

Web Address [input] [icon]

Save Reset

8. You can view the member's employment information that was just entered by clicking on the Employment tab. From here you can also add additional employment information, or delete employment information.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout



Amalgamated Life
America's Labor Insurance Company®

[Redacted] [Change Employer]

Home » Members for Your Employer » View/Update Member Data

Demographics | Documents & Letters | **Employment**

Employee/Member: MEMBER, TEST (New Search) SSN: XXX-XX-4447

Employment Information

+ Controls							
Emp#	Name	Code	Name	Barg. Unit Name	Hire Date	Stop Date	Job Category
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	12/26/2009	/ /	Eligible Employee

5: Update Billing Reports




The Purpose of this Exercise is to illustrate how to update billing reports in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

Update Billing Reports in Employer Self Service

1. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



Amalgamated Life
America's Labor Insurance Company®

User:

Password:

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- From the Home page, click on the 'Review Employer Reports, Billing History, and Payments' link under the Employer Management area.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home

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

Employer Management

- [View/Update Employer Information](#)
- [View/Update Billing Location Information](#)
- [Review Employer Reports, Billing History & Payments](#)

Members for Your Employer

- [View/Update Member Information](#)
- [Process a New Hire Member](#)

Import Files

- [Import New System Data](#)

Administration Functions

- [View/Update User Information](#)

News and Alerts

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- The Reports, Billing History, & Payments page is displayed, and defaults to the Transactions tab. Click on the 'Work History' tab.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Employer Management » Reports, Billing History & Payments

Transactions | **Work History** | Employment | Payment History | Documents

Billing Location: [Redacted]

- From the Work History tab, select a Work Report in "Initial" status to update, and then click on the 'Edit Work Report' button.

The screenshot shows the Amalgamated Life web application interface. At the top, there is a navigation bar with "Home » Employer Management » Reports, Billing History & Payments". Below this, there are tabs for "Transactions", "Work History", "Employment", "Payment History", and "Documents". The "Work History" tab is selected. The main content area displays a "Work Reports" table with columns: "Inserted Date", "Report Type", "Report Status", "Date Released", "User Released", "Report Start Date", "Identifier", "Trans#", "Total Due", and "Total Balance". The first row of the table is highlighted in red, and the "Edit Work Report" button is also highlighted in red. The table contains various reports with different statuses, including "Initial", "Released", and "Prcbill".

- The Work Report opens in a new window.

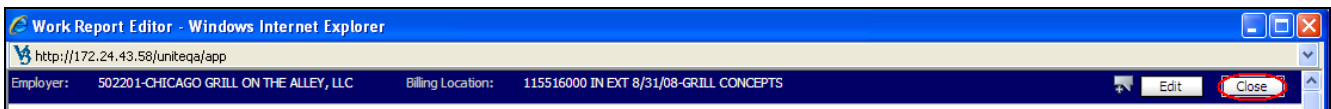
The screenshot shows a "Work Report Editor - Mozilla Firefox" window. The address bar shows the URL: "http://172.24.43.58/unit/eqa/app?service=external/EmployerPages/WorkReportPage&sp=L2043950&sp=T". The window contains a "Criteria" section with various input fields for "Billing Location", "Barg Unit", "Report Start Date", "Report Stop Date", "Batch No.", "Member Count", "Report Status", "WH Source", "Date Received", "Contribution Date", "Date Released", "User Released", "Trans#", "Type", "Identifier", "Trans Analyst", "Report Status Override", "Report Release Code", and "Reporting Agent Key Value". Below the criteria section is a "Work History" table with columns: "Seq No", "SSN", "User", "Job Category", "Start Date", "Stop Date", "Small Desc", and "# Hours". The table contains 17 rows of data, with the first row highlighted in yellow. The "Job Category" for the first row is "Banquet Employee".

- From here, you can update the report to include the number of hours worked by each employee. Once you have made the updates, click on the 'Save' button.

The screenshot shows the 'Work Report Editor' application window. At the top, there are fields for 'Employer' and 'Billing Location', along with 'Save' and 'Cancel' buttons. Below this is a 'Criteria' section with various input fields and buttons. The 'Work History' section contains a table with columns for 'Seq No', 'SSN', 'User', 'Job Category', 'Start Date', 'Stop Date', 'Small Desc', and '# Hours'. The '# Hours' column is highlighted with a red border.

Seq No	SSN	User	Job Category	Start Date	Stop Date	Small Desc	# Hours
1			Banquet Employee	07/01/2010	07/31/2010	A	
2			Banquet Employee	07/01/2010	07/31/2010	A	
3			Banquet Employee	07/01/2010	07/31/2010	A	
4			Banquet Employee	07/01/2010	07/31/2010	A	
5			Banquet Employee	07/01/2010	07/31/2010	A	
7			Banquet Employee	07/01/2010	07/31/2010	A	40.00
8			Banquet Employee	07/01/2010	07/31/2010	A	
9			Banquet Employee	07/01/2010	07/31/2010	A	
10			Banquet Employee	07/01/2010	07/31/2010	A	
11			Banquet Employee	07/01/2010	07/31/2010	A	
12			Banquet Employee	07/01/2010	07/31/2010	A	
13			Banquet Employee	07/01/2010	07/31/2010	A	
14			Banquet Employee	07/01/2010	07/31/2010	A	
15			Eligible Employee	07/01/2010	07/31/2010	A	
16			Eligible Employee	07/01/2010	07/31/2010	A	
17			Eligible Employee	07/01/2010	07/31/2010	A	
18			Eligible Employee	07/01/2010	07/31/2010	A	

- After the report is saved, click the 'Close' button.



- The Work Report window closes. The Work History tab is once again displayed. To release the completed work report, click the 'Release' button. *Employee members of ESS can Release Work Reports that are only in "Initial" status.*

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Employer Management » Reports, Billing History & Payments

Transactions | **Work History** | Employment | Payment History | Documents

Billing Location: [Redacted] | New Work Report | New Adjustment

Work Reports

Report Status: [All] Report Type: [All] Show Converted Reports:

View Work Report | Edit Work Report | **Release** | Delete

Inserted Date	Report Type	Report Status	Date Released	User Released	Report Start Date	Identifier	Trans#	Total Due	Total Balance
01/22/2010	Regular	Initial	//		02/01/2010			\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		12/01/2010		4883	\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		11/01/2010		4882	\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		10/01/2010		4881	\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		09/01/2010		4880	\$8.00	\$8.00
01/07/2010	Regular	Released	01/07/2010		01/01/2010		4858	\$0.00	\$0.00
12/14/2009	Regular	Released	12/14/2009		12/01/2009		4815	\$0.80	\$0.80
12/14/2009	Regular	Released	01/07/2010		11/01/2009		4812	\$3.34	\$3.34
12/08/2009	Regular	Released	01/07/2010		10/01/2009		4808	\$0.16	\$0.16
12/08/2009	Adjustment	Prebill	//		10/01/2009		4807	(\$0.42)	(\$0.42)
12/01/2009	Adjustment	Released	12/01/2009		08/01/2009		4793	(\$16.00)	(\$16.00)
11/23/2009	Regular	Released	01/05/2010		09/01/2009		4754	\$3.20	\$3.20
10/10/2009	Regular	Released	01/05/2010		08/01/2009		3265	\$828.00	\$828.00
09/15/2009	Regular	Released	11/06/2009		07/01/2009		3150	\$3,200.00	\$3,200.00
06/09/2009	Regular	Released	09/15/2009		06/01/2009		964	\$112.00	\$0.00
05/12/2009	Regular	Released	01/19/2010		05/01/2009		4857	\$145.06	\$145.06
04/28/2009	Regular	Released	04/28/2009		04/01/2009		179	\$2,368.00	\$0.00
04/09/2009	Regular	Released	06/09/2009		03/01/2009		56	\$0.00	\$0.00
04/08/2009	Regular	Released	04/28/2009		02/01/2009		25	\$2,644.56	\$2,144.56
01/20/2009	Regular	Released	04/28/2009		01/01/2009		23	\$6,630.11	\$5,998.11
01/16/2009	Adjustment	Released	01/16/2009		11/01/2008			(\$703.34)	\$0.00

- The row updates to indicate that the report status has been changed to "Pre-Bill".

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Employer Management » Reports, Billing History & Payments

Transactions | **Work History** | Employment | Payment History | Documents

Billing Location: [Redacted] | New Work Report | New Adjustment

Work Reports

Report Status: [All] Report Type: [All] Show Converted Reports:

View Work Report | Edit Work Report | Release | Delete

Inserted Date	Report Type	Report Status	Date Released	User Released	Report Start Date	Identifier	Trans#	Total Due	Total Balance
01/22/2010	Regular	Prebill	//		02/01/2010		4894	\$0.32	\$0.32
01/18/2010	Regular	Released	01/18/2010		12/01/2010		4883	\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		11/01/2010		4882	\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		10/01/2010		4881	\$0.00	\$0.00
01/18/2010	Regular	Released	01/18/2010		09/01/2010		4880	\$8.00	\$8.00
01/07/2010	Regular	Released	01/07/2010		01/01/2010		4858	\$0.00	\$0.00
12/14/2009	Regular	Released	12/14/2009		12/01/2009		4815	\$0.80	\$0.80
12/14/2009	Regular	Released	01/07/2010		11/01/2009		4812	\$3.34	\$3.34
12/08/2009	Regular	Released	01/07/2010		10/01/2009		4808	\$0.16	\$0.16
12/08/2009	Adjustment	Prebill	//		10/01/2009		4807	(\$0.42)	(\$0.42)
12/01/2009	Adjustment	Released	12/01/2009		08/01/2009		4793	(\$16.00)	(\$16.00)
11/23/2009	Regular	Released	01/05/2010		09/01/2009		4754	\$3.20	\$3.20
10/10/2009	Regular	Released	01/05/2010		08/01/2009		3265	\$828.00	\$828.00
09/15/2009	Regular	Released	11/06/2009		07/01/2009		3150	\$3,200.00	\$3,200.00
06/09/2009	Regular	Released	09/15/2009		06/01/2009		964	\$112.00	\$0.00
05/12/2009	Regular	Released	01/19/2010		05/01/2009		4857	\$145.06	\$145.06
04/28/2009	Regular	Released	04/28/2009		04/01/2009		179	\$2,368.00	\$0.00
04/09/2009	Regular	Released	06/09/2009		03/01/2009		56	\$0.00	\$0.00
04/08/2009	Regular	Released	04/28/2009		02/01/2009		25	\$2,644.56	\$2,144.56
01/20/2009	Regular	Released	04/28/2009		01/01/2009		23	\$6,630.11	\$5,998.11
01/16/2009	Adjustment	Released	01/16/2009		11/01/2008			(\$703.34)	\$0.00

View Member Contacts in Employer Self Service

10. Click on the Employment Tab.

The screenshot displays the Amalgamated Life Employer Self Service interface. At the top, the date is Friday, January 22, 2010, and the user is welcomed. The Amalgamated Life logo and tagline "America's Labor Insurance Company" are visible. The navigation bar includes "Home » Employer Management » Reports, Billing History & Payments". The "Employment" tab is highlighted with a red box. Below the navigation bar, there are tabs for "Transactions", "Work History", "Employment", "Payment History", and "Documents". The "Billing Location" is set to a redacted value. The "Criteria" section includes a "Billing Location" dropdown, "Start" and "Stop" date pickers (both set to "Hire Date"), and an "SSN" input field. The "Agreement" dropdown is set to "All". A "Filter" button is present. Below the criteria, the "Member Contracts" section shows a table with columns for "SSN", "User", "Code", "Barg. Unit Name", "Hire Date", and "Stop Date".

Member Contracts						
+ Controls						
SSN	User	Code	Barg. Unit Name	Hire Date	Stop Date	

11. From here you can use the filter criteria to generate a list of members for a specific Agreement and at a specific Billing Location. You may also view/edit member information by clicking on a member from the resulting member list.

View Payment History in Employer Self Service

12. Click on the Payment History Tab. This screen shows the payment history for the employer. Use the drop-down menu to display either 'All' 'Open' or 'Closed' payments.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Redacted] [Change Employer]

Home » Employer Management » Reports, Billing History & Payments

Transactions | Work History | Employment | **Payment History** | Documents

Billing Location: [Redacted]

Payments


[All] [Dropdown]

Deposit Date	Batch No	Payment Type	Check No	Check Account No	Check Aba No	Fund Id	Payment Amount	Remaining Amount
10/14/2009	[Redacted]	Mailed	[Redacted]	[Redacted]	[Redacted]	Totals	\$828.00	\$828.00
						Pension	\$828.00	\$828.00
07/01/2009						Totals	\$0.00	\$0.00
06/08/2009	[Redacted]		[Redacted]	[Redacted]	[Redacted]	Totals	\$858.00	\$858.00
04/30/2009						Totals	\$0.00	\$0.00
04/30/2009						Totals	\$0.00	\$0.00
04/29/2009		Mailed				Totals	\$0.00	\$0.00
04/15/2009		Mailed				Totals	\$0.00	\$0.00

View Transactions in Employer Self Service

13. Click on the Transactions Tab. This screen shows transaction activity for the employer such as work history reports that have been created and payments that have been received.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] Account Settings | Logout



America's Labor Insurance Company® [Change Employer]

Home » Employer Management » Reports, Billing History & Payments

Transactions | Work History | Employment | Payment History | Documents

Billing Location: [Redacted]

Criteria

View: Default [Add] [Save] [Delete]

Trans Status: Open [Dropdown] Trans Types: All [Dropdown] Activity Start: / / [Calendar] Activity Stop: / / [Calendar]

Fund Columns: Fund Groups [Dropdown] Totals: Totals [Dropdown] Reporting Agency: All [Dropdown] Trans#: [Text]

[Filter] [Clear]

Transactions

[View Trans.]

Controls							
Trans#	Inserted Date	Status	Type	Identifier	Activity Date	Pension Balance	Total Balance
4894	01/22/2010	Open	WH Report	[Redacted]	02/01/2010	\$0.32	\$0.32
4880	01/18/2010	Open	WH Report	[Redacted]	09/01/2010	\$8.00	\$8.00
4857	01/07/2010	Open	WH Report	[Redacted]	05/01/2009	\$145.06	\$145.06
4815	12/14/2009	Open	WH Report	[Redacted]	12/01/2009	\$0.80	\$0.80
4812	12/14/2009	Open	WH Report	[Redacted]	11/01/2009	\$3.34	\$3.34
4808	12/08/2009	Open	WH Report	[Redacted]	10/01/2009	\$0.16	\$0.16
4807	12/08/2009	Open	Billing Adj.	[Redacted]	12/08/2009	(\$0.42)	(\$0.42)
4793	12/01/2009	Open	Billing Adj.	[Redacted]	12/01/2009	(\$16.00)	(\$16.00)
4791	11/30/2009	Open	Payment	[Redacted]	10/14/2009	(\$828.00)	(\$828.00)
4754	11/23/2009	Open	WH Report	[Redacted]	09/01/2009	\$3.20	\$3.20
3286	10/13/2009	Open	Liq. Damages	[Redacted]	10/13/2009	\$42.78	\$42.78
3285	10/13/2009	Open	Interest	[Redacted]	10/13/2009	\$42.78	\$42.78
3265	10/10/2009	Open	WH Report	[Redacted]	08/01/2009	\$828.00	\$828.00
3154	09/15/2009	Open	Premium Assistance	[Redacted]	05/15/2009	\$3,310.00	\$3,310.00
3150	09/15/2009	Open	WH Report	[Redacted]	07/01/2009	\$3,200.00	\$3,200.00
963	06/09/2009	Open	Premium Assistance	[Redacted]	06/09/2009	\$116.32	\$116.32
960	06/08/2009	Open	Payment	[Redacted]	06/08/2009	(\$858.00)	(\$858.00)
25	04/08/2009	Open	WH Report	[Redacted]	02/01/2009	\$2,144.56	\$2,144.56
23	04/07/2009	Open	WH Report	[Redacted]	01/01/2009	\$5,998.11	\$5,998.11
							\$14,141.01

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6: View/Update Employer Information




The Purpose of this Exercise is to illustrate how to view and update Employer Information in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

View/Update Employer Information

1. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



Amalgamated Life
America's Labor Insurance Company®

User:

Password:

[Log In](#)

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2. From the Employer Self-Service Home page, click on the 'View/Update Employer Information' link.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Redacted] [Change Employer]

Home

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

Employer Management

- [View/Update Employer Information](#)
- [View/Update Billing Location Information](#)
- [Review Employer Reports, Billing History & Payments](#)

Members for Your Employer

- [View/Update Member Information](#)
- [Process a New Hire Member](#)

Import Files

- [Import New System Data](#)

Administration Functions

- [View/Update User Information](#)

News and Alerts

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- The View/Update Employer screen is displayed. From this page you can see important details about this employer such as the Employer Number, DBA, and Federal ID Number, as well as Employer Status, Address and Contact information.

Friday, January 22, 2010 | Welcome [redacted] | I Want To: [dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Employer Management » View/Update Employer

Profile | Contacts

Employer Details

Emp#: [redacted]
Name: [redacted]
DBA: [redacted]
FEDERAL ID #: [redacted]
Business Type: Corporation [dropdown]
Sic Code 1: [redacted]
Sic Code 2: [redacted]

Additional Info

Terminated Employer: Active [dropdown]

Address Information

Add Copy Stop Print

Address Type: Residence [dropdown] Valid: [checkbox]
Address: Apr 8, 2009 - [dropdown] Address Source: Employer [dropdown]
Address 1: [redacted]
Address 2: [redacted]
Address 3: [redacted]
Country: US [dropdown] Zip: [redacted]
City: [redacted]
State: [dropdown]
County: [dropdown]

Contact Information

Subtype	Country	Phone	Ext	Primary
Phone [dropdown]	US [dropdown]	[redacted]	[redacted]	<input type="checkbox"/>

Email [redacted]
Fax [redacted]
Web Address [redacted]

Save Reset

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- Update the desired employer information then click 'Save'.



View/Add Employer Contacts

- Click on the Contacts tab. From here you can view a list of contacts that are at this Employer. Select a contact from the Contacts section on top in order to view detailed information about that contact in the Role section below.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Employer Management » View/Update Employer

Profile | **Contacts**

+ Add Contact

Contacts

Name	Type
[Redacted]	Member
[Redacted]	Member
[Redacted]	Member
[Redacted]	Accounting
[Redacted]	Accounting
[Redacted]	Accounting
[Redacted]	Other
[Redacted]	Administrative

Role

Type: [Dropdown]

Contact Information

Prefix: [Text] First Name: [Text] Middle Name: [Text] Last Name: [Text] Suffix: [Text]

SSN: [Text] Date of Birth: [Text] Date of Death: [Text] Gender: Female Male

Age: [Text]

[Save] [Delete] [Reset]

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- To add a contact, click on the 'Add Contact' link.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

Home » Employer Management » View/Update Employer

Profile | Contacts

Add Contact

- A menu is displayed that will allow you to add a new contact for the current employer, add a new contact for another employer, or to link a contact.

Profile | **Contacts**

+ Add Contact

- Add Contact
- New Other - Org
- Link Contact

7: View/Update Billing Location Info




The Purpose of this Exercise is to illustrate how to view and update Billing Location Information in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

View/Update Billing Location Information

1. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



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User:

Password:

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- From the Employer Self-Service Home page, click on the 'View/Update Employer Information' link.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Redacted] [Change Employer]

Home

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

Employer Management | **News and Alerts**

- [View/Update Employer Information](#)
- [View/Update Billing Location Information](#)
- [Review Employer Reports, Billing History & Payments](#)

Members for Your Employer

- [View/Update Member Information](#)
- [Process a New Hire Member](#)

Import Files

- [Import New System Data](#)

Administration Functions

- [View/Update User Information](#)

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- The View/Update Billing Location screen is displayed. From this page you can view and update employer billing related information.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Change Employer]

Home » Employer Management » View/Update Billing Locations

Billing Location | Contacts

Billing Location: [Redacted]

Billing Location

Name: [Redacted]
 Code: [Redacted]
 Location Status: Active
 Team: Midwest
 Updated Date: 10/05/2009
 Billing Stmt Print Date: 05/23/2006
 Statement: Receive Statement
 Parent Billing Entity: [Redacted]

Billing Report Level: Employee\Billing Entity\Barg U
 Billing Option: Prebill - Use Roster
 Account Rep:
 Report Option: Direct Mail Bill
 Billing Group: Regular Bill
 Interest Type: standard
 Work Location: [Redacted] Search Clear New

Address Information

Add Copy Stop Print

Address Type: Residence Valid:
 Address Period: Apr 8, 2009 - Address Source: Employer

Use Parent Address:

Address 1: [Redacted]
 Address 2: [Redacted]
 Address 3: [Redacted]
 Country: [Redacted] Zip: [Redacted]
 City: [Redacted]
 State: [Redacted]
 County: [Redacted]

Contact Information

Phone
 Subtype: Phone Country: US Phone: [Redacted] Ext: [Redacted] Primary:

Email
 Fax

Save Reset

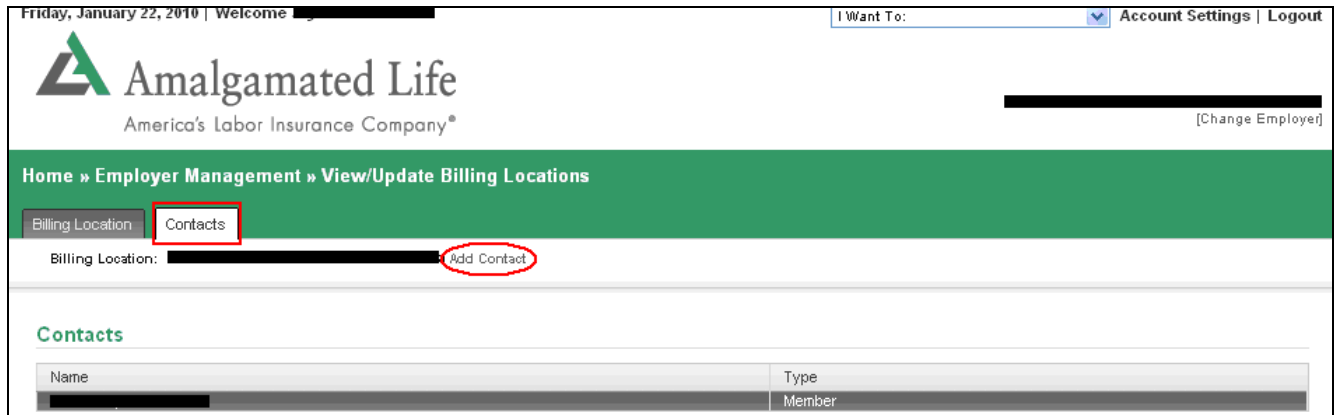
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- Update the desired billing location information then click 'Save'.



View/Add Employer Billing Contacts

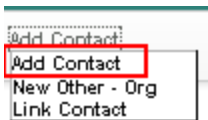
- Click on the Contacts tab. From this screen you can add a Employer Billing Contact. Click the 'Add Contact' link.



- A pop-up menu is displayed that allows you to choose to add a new billing contact for the current employer, a new billing contact for a different employer, or to link a contact.



- Select 'Add Contact'.



- The Add contact screen is displayed. Enter the desired contact information and then click 'Save' to complete adding the contact.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company®

[Change Employer]

Home » Employer Management » View/Update Billing Locations

Billing Location: [Redacted] | Add Contact

Contacts

Name	Type
[Redacted]	Member

Role

Type:

Contact Information

Title: [Dropdown]
 Oip Type Id: Other Party Code: [Text]
 SSN: [Text] Person Id: [Text]
 Prefix: [Dropdown] First Name: Middle Name: [Text] Last Name: Suffix: [Dropdown]
 Date of Birth: [Calendar] Date of Death: [Calendar] Age: [Text]
 Sex: Female Male

Address

There are no address records on file.

Contact Details

Phone

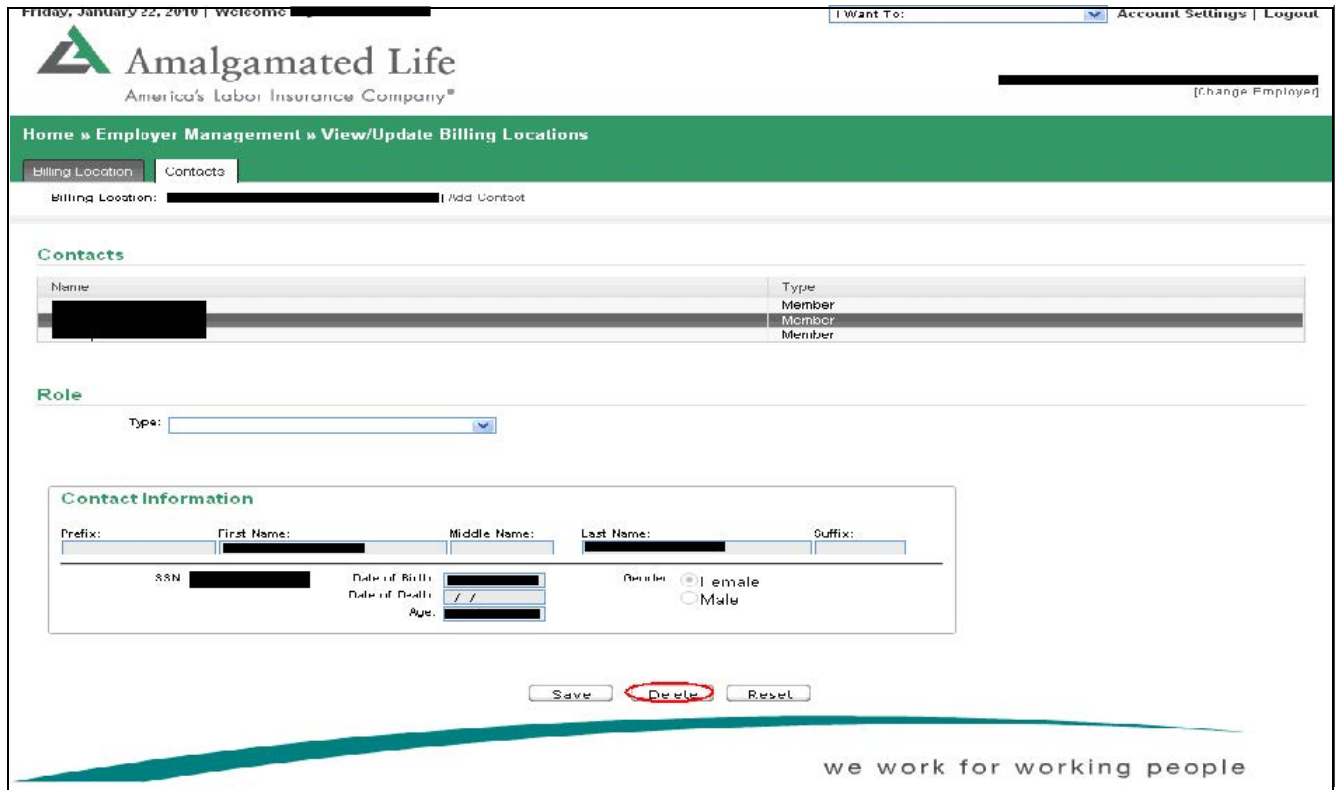
Subtype	Country	Phone	Ext	Primary	
<input type="text" value="Cellphone"/>	<input type="text" value="US"/>	<input type="text"/>		<input type="checkbox"/>	×
<input type="text" value="Home"/>	<input type="text" value="US"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	×

Email

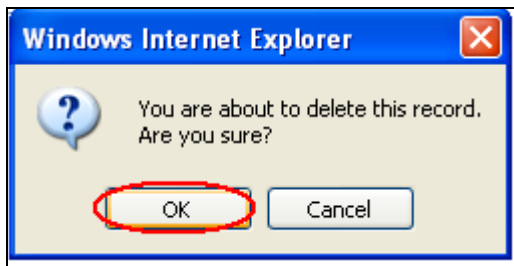
Subtype	Email	Primary	
<input type="text" value="Primary"/>	<input type="text"/>	<input type="checkbox"/>	×

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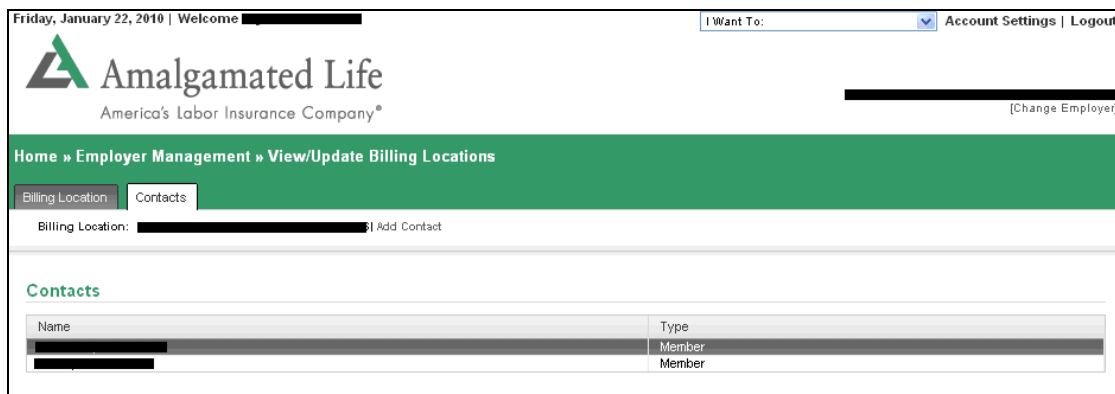
9. To delete the contact, select the contact to be deleted under the Contacts area, then click 'Delete'.



10. The confirm delete window is displayed, click 'OK'.



11. The billing contact is deleted.



8: Import Files




The Purpose of this Exercise is to illustrate how to import files in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

Import Files

1. Open an Excel spreadsheet on your computer that you wish to import.
2. Press CTRL+A.
3. Click on the ESS_Import.RDP icon on your desktop. Enter your username and password to login.
4. After the blank spreadsheet is open press CTRL+V.
5. Close the ESS_Import Excel window. Choose to Save the document in the default location. Name the file to save ESSImport.
6. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



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America's Labor Insurance Company®

User:

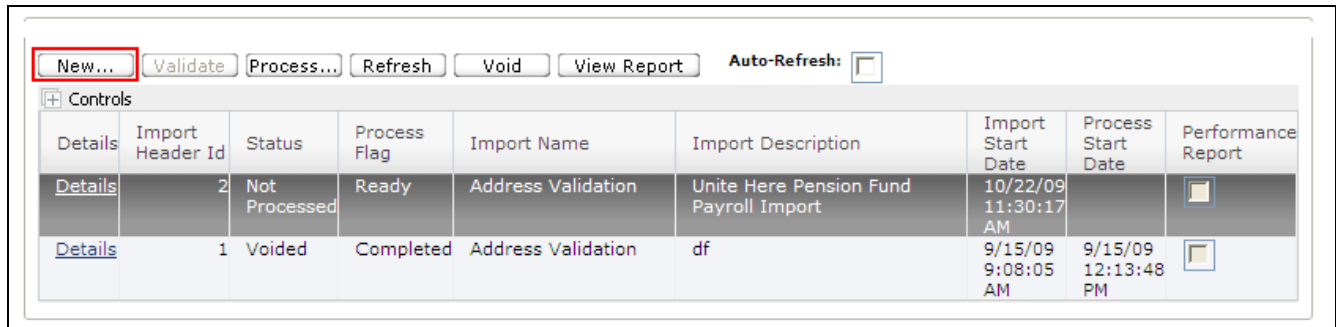
Password:

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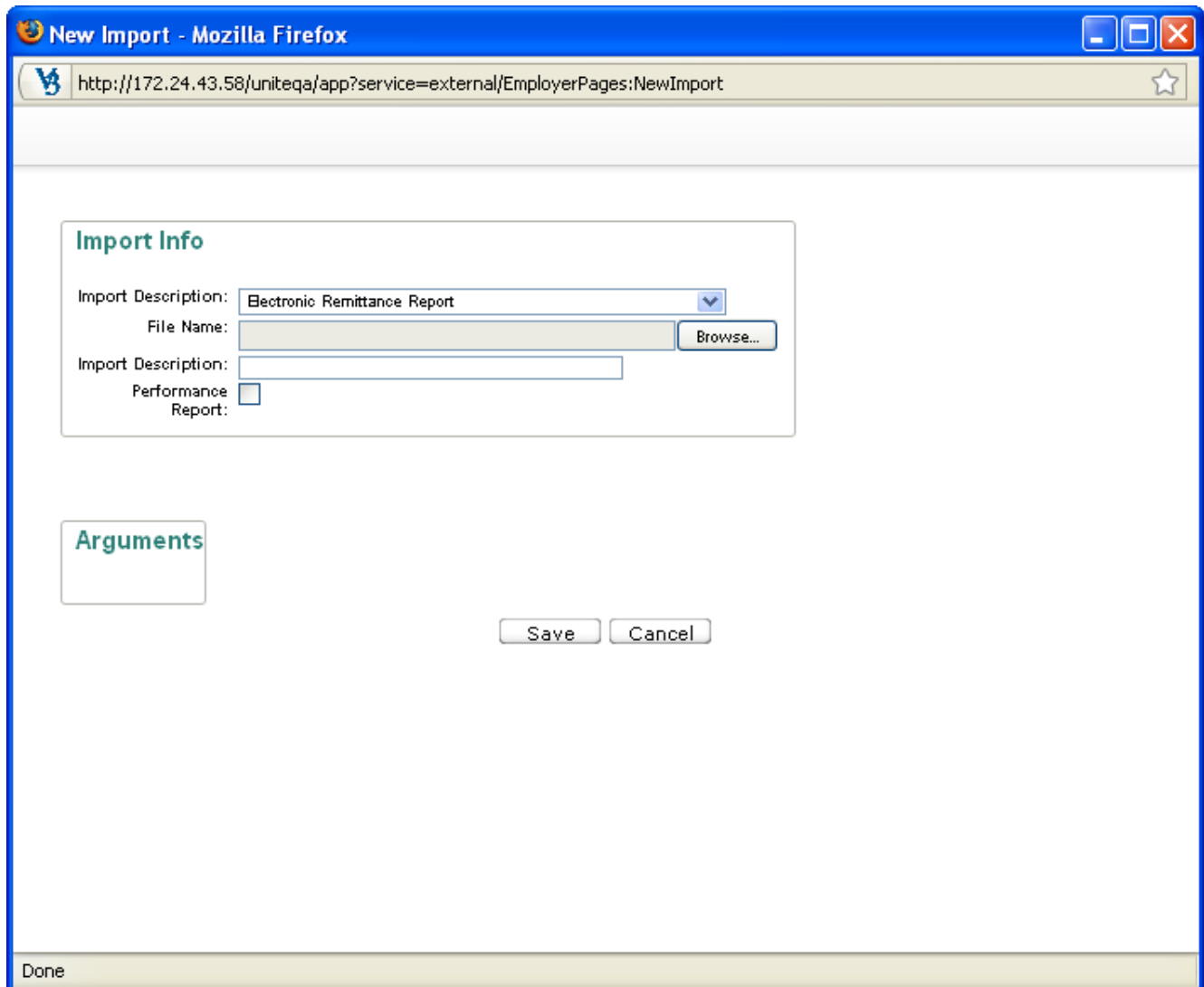
7. From the Home page, click on the 'Import New System Data' link from the Import Files area.

8. The Import Files tab is displayed. This screen lets you import data into ESS.
9. The Filter section allows you to display imports by Description or Status, as well as to refine results by Start Date.

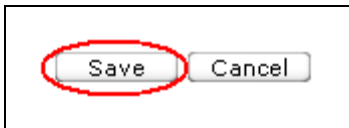
10. To create a new import, click the 'New' button.



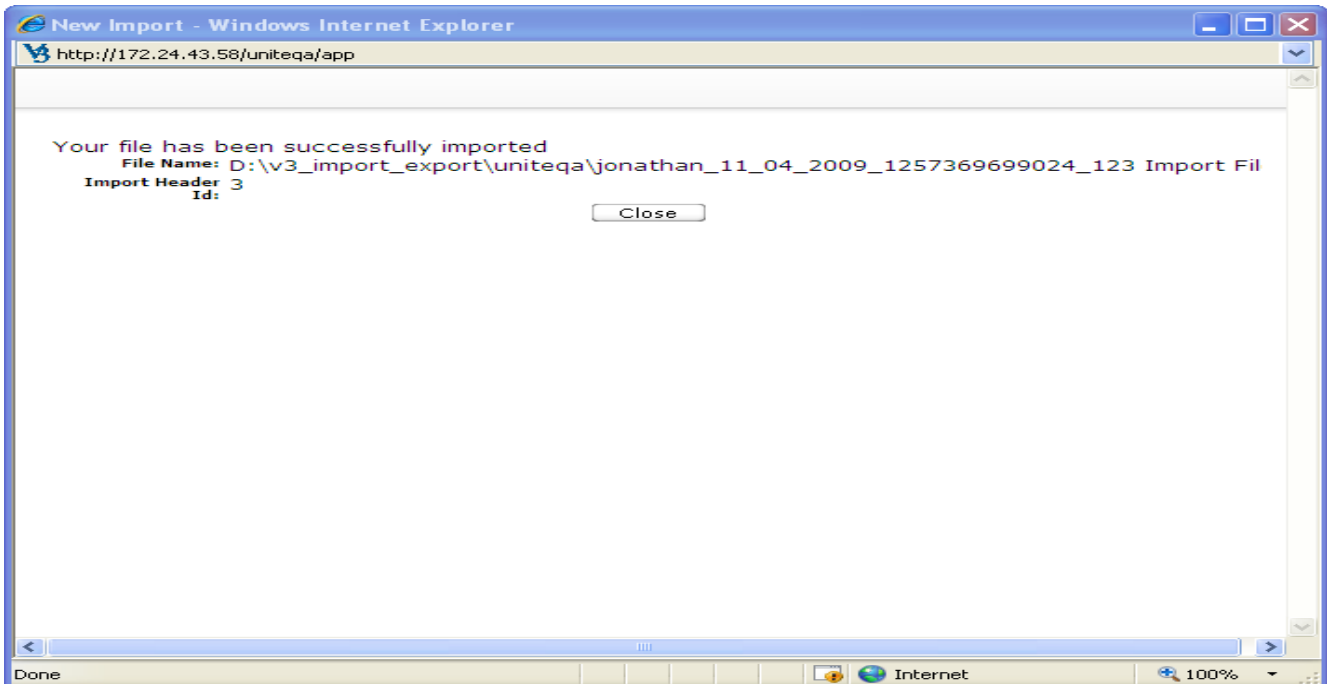
11. The New Import pop-up window is displayed. Select an Import Description from the drop-down list, then click the 'Browse' button. Select ESSImport file and click Open button. Then, enter an Import Description.



12. Click 'Save' to import the file.



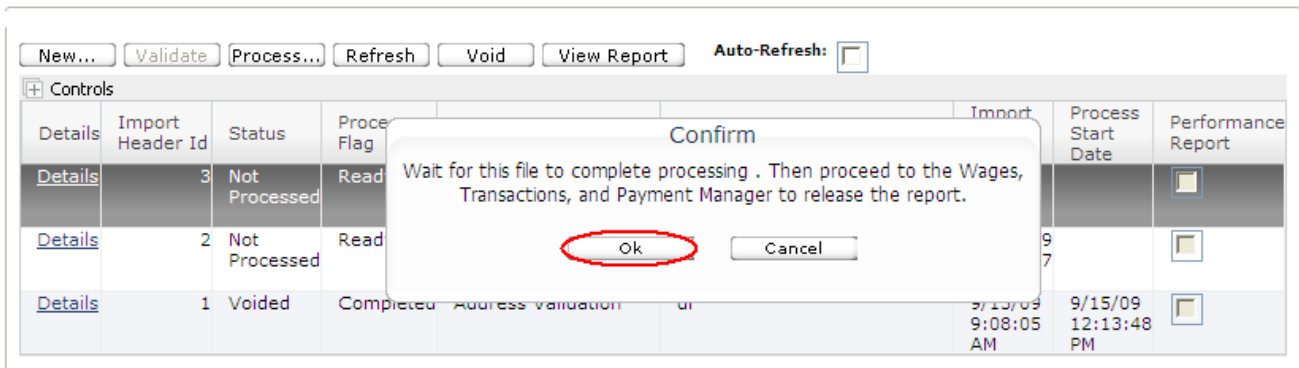
13. A message will display indicating the file has been uploaded successfully. Click the 'Close' button to close.



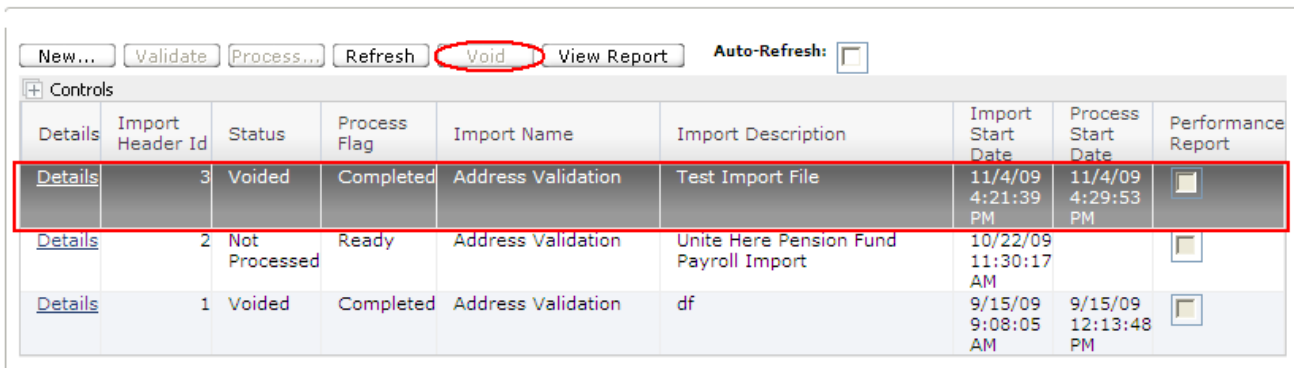
14. The new import file will be displayed with a status of 'Not Processed'

<input type="button" value="New..."/> <input type="button" value="Validate"/> <input type="button" value="Process..."/> <input type="button" value="Refresh"/> <input type="button" value="Void"/> <input type="button" value="View Report"/> <input type="checkbox"/> Auto-Refresh								
Controls								
Details	Import Header Id	Status	Process Flag	Import Name	Import Description	Import Start Date	Process Start Date	Performance Report
Details	3	Not Processed	Ready	Address Validation	Test Import File	11/4/09 4:21:39 PM		<input type="checkbox"/>
Details	2	Not Processed	Ready	Address Validation	Unite Here Pension Fund Payroll Import	10/22/09 11:30:17 AM		<input type="checkbox"/>
Details	1	Voided	Completed	Address Validation	df	9/15/09 9:08:05 AM	9/15/09 12:13:48 PM	<input type="checkbox"/>

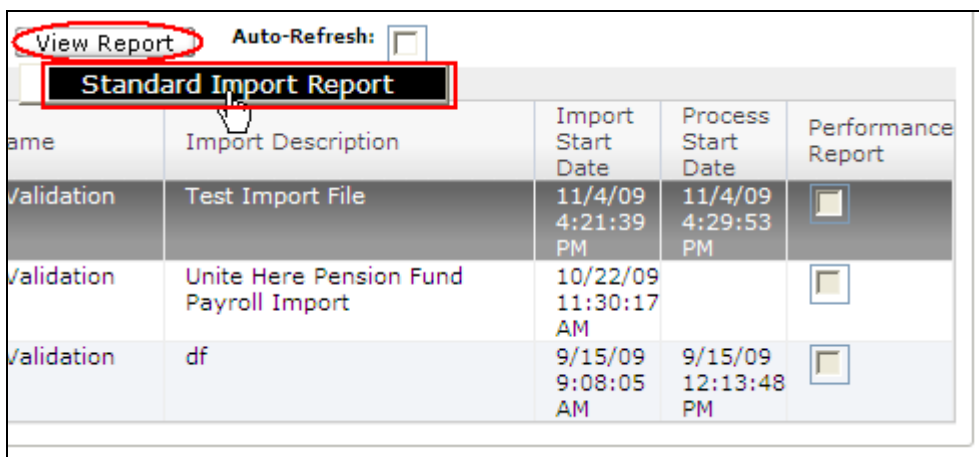
15. To process the file, click the 'Process' button. A confirmation pop-up window will appear. Click 'OK' to begin processing.



16. To void a previous/existing import, click on the desired import transaction, then click the 'Void' button. The Status will change to 'voided'.



17. Click the 'View Report' button to generate a report of imports.



18. The Import Details Report pop-up window is displayed, allowing you to specify your report generation parameters. Once you have made your selections, click the 'Show/Schedule Report' button.

Import Details Report - Mozilla Firefox

http://172.24.43.58/uniteqa/app?service=vcs/JasperReporting:PopupReportViewer&REPORT_DEFINITION

Close

Select Report

Category: Accounts

Report: Standard Import Report

Background:

Export Type: Pdf Csv Excel Html

Select Parameters

Import Header ID: 71

Import Name: ravi011210

Detail Record Status: --All--

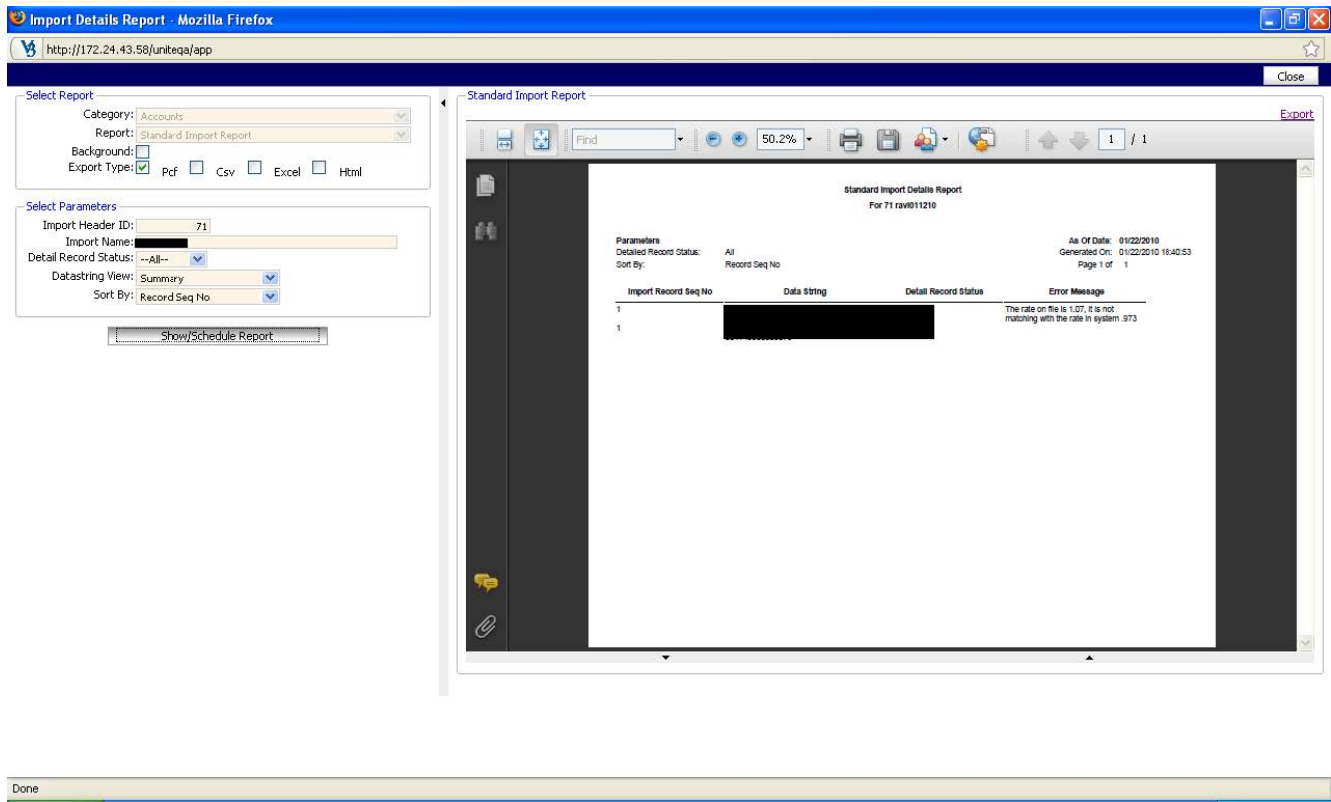
Datastring View: Summary

Sort By: Record Seq No

Show/Schedule Report

Done

19. The Import Details report is displayed. After reviewing the report, you can click the ‘Export’ link to export it to another format. Once you are done reviewing the report, click ‘Close’.



9: News & Billing Alerts




The Purpose of this Exercise is to illustrate how to manage news and billing alerts in Employer Self-Service.

Please refer to the user ID / password information provided by Amalgamated Life Insurance Company.

View Alerts

20. To log in to the Employer Self-Service application, enter your User Name and Password then click 'Log In'.

Friday, January 22, 2010



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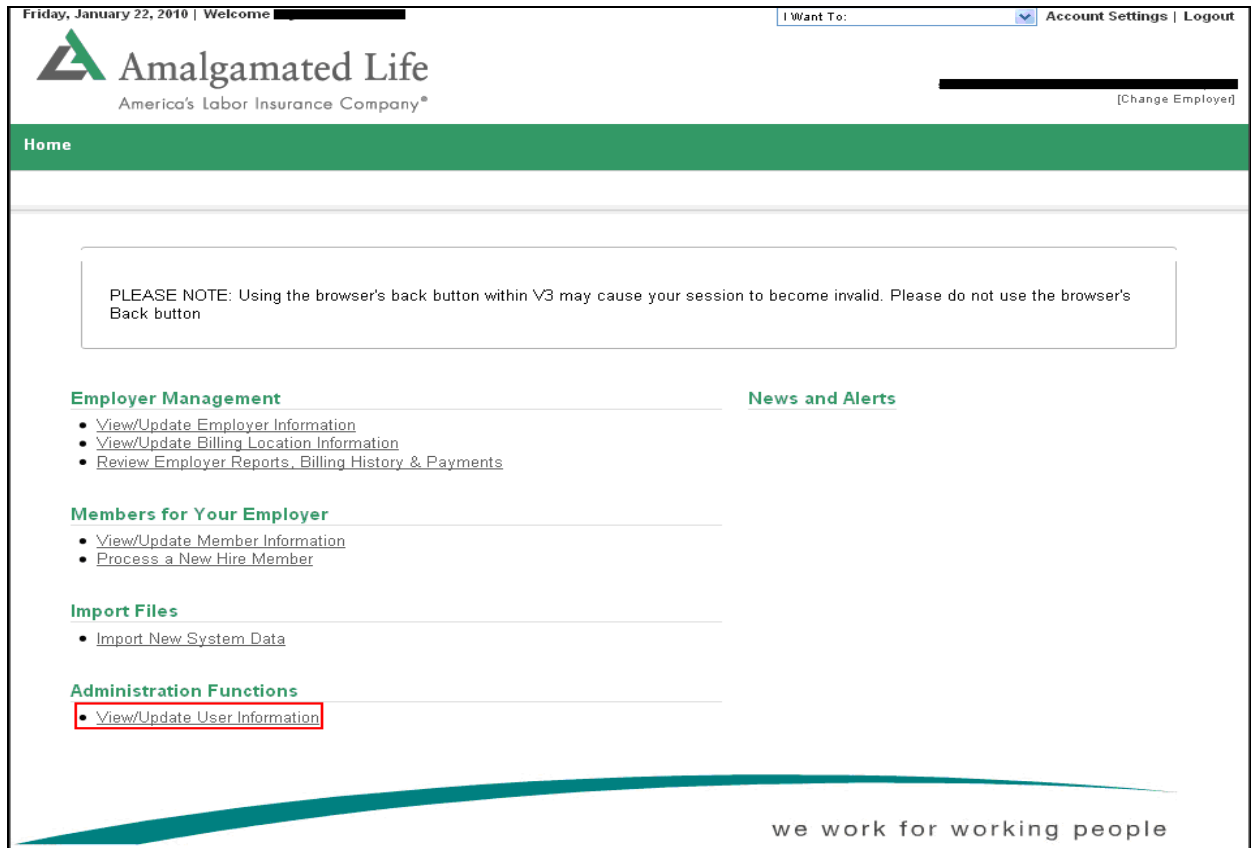
User:

Password:

[Log In](#)

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21. From the Employer Self-Service Home page, click on the ‘View/Update User Information’ link.



Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Change Employer]

Home

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

Employer Management

- View/Update Employer Information
- View/Update Billing Location Information
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- Import New System Data

Administration Functions

- View/Update User Information**

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22. The Employer User Administration screen is displayed. Select a user from the Employer Contact list.

Employer Contacts

Add | Delete

User	User	UserId	Status
[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]		Active

23. The User Details screen is displayed.

Friday, January 22, 2010 | Welcome [Redacted] | I Want To: [Dropdown] | Account Settings | Logout

Amalgamated Life
America's Labor Insurance Company® [Change Employer]

Home » Administration Functions » Employer User Administration

View/Update Employer Users | Add Employer User | Security

Billing Location: [Redacted]

User Details

User: [Redacted]
 Password: ***** (Change)
 Type: Accounting [Dropdown]
 Reset Password Flag:
 Lock Account:
 Workflow Access:

Title: [Redacted]
 SSN: [Redacted]
 Prefix: [Dropdown]
 First Name: [Redacted]
 Middle Name: [Redacted]
 Last Name: [Redacted]
 Suffix: [Dropdown]
 Date of Birth: [Redacted] [Calendar]
 Sex: Female Male

Address Information

Add

There are no address records on file.

Contact Information

Phone [Redacted] [Edit]
 Email [Redacted] [Edit]

Application

Application	Suspended
Employer Self Service	<input type="checkbox"/>

Business Entity List

Type
Accounts Receivable [Dropdown]
Accounts Receivable [Dropdown]
Accounts Receivable [Dropdown]
President [Dropdown]
[Redacted] [Dropdown]
Accounts Receivable [Dropdown]

User Groups

Employer Self Service [Dropdown] Add Delete

+ Controls	
Department Name	Priority
LOB User *	100
LOB User - System Administrator *	120
Employer User *	130

* Universal Role

Subscriptions

+ Controls	
Display Name	
News	<input checked="" type="checkbox"/>

Save Delete

24. The Subscriptions section is where you can opt-in the user to receive news or other alerts.



25. Once you have finished updating the subscriptions settings, click 'Save' to save these changes.

