

# **Carpenter Funds Administrative Office Of Northern California**



## **Employer Self Service User Guide V1.5**

**March 2011 opeiu 3 afl-cio (125)**

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## **Introduction:**

Employer Self Service (ERSS) provides a tool for the User to process monthly Billing Reports via the Internet. This process is intended to reduce the time it takes to process the monthly Billing Reports.

### **Minimum system requirements:**

1.5 Ghz processor  
1 GB RAM  
Windows XP or Windows Server 2003  
Java 6.0  
Adobe 7.x  
Firefox 3, Safari 3 or IE 7

The User may use the **Employer Management Reports, Billing History & Payments** tab to manually enter the hours for each employee under HW. The System will calculate the totals under each Trust Fund for the employees Occupation and Skill Code. You will be able to save a copy to your computer and print a hard copy for your records.

As with any type of electronic file, it is important to SAVE your work periodically to avoid lost data in the case of a power outage, computer malfunction, system error, etc.

In the near future, the User will have the option to Import and Export files to and from ERSS. Once this option is available, the Users will be notified.

### **It is important to note the following if reporting an employee for the first time:**

1. Using the Add button, enter employee's social security number. If a name appears, that means the social security number is being used by a participant of the Fund. Please make sure the name matches our records. Many times an employee may use a similar name, if you are certain it is the same individual you may continue. If the record is not the same, please verify the social security number prior to input.
2. If the employee is NOT in our system, you must contact our office, either by phone or using the "CONTACT US" button at the bottom of the Web page.
3. If you are reporting a Non-contractual Employee for the first time, you must contact our office, either by phone or using the "CONTACT US" button at the bottom of the Web page.

## Chapter 1 - Getting Started

### Log on to Employer Self Service

Go to <https://employer.carpenterfunds.com/v3prd/erlogin>

You will be redirected to the CFAO Self Service Login page



Tuesday, November 17, 2009

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

User:  
000010\_Test

Password:  
\*\*\*\*\*

Log In

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

Type your user name 012345\_Test Employer in the **User** field

Type your **password** that we have provided to you

Click **Log In**

You will be required to enter a New unique password.

#### Passwords:

You cannot re-use your previous 6 passwords.

Your password must be at least 6 characters long.

Your password must contain at least one of each of the following categories.

Alpha character (a-z, upper or lower case)

Numeric character (0-9)

Non-alphanumeric character (anything not a letter or a number)

**Please ensure that Reset Password, Reset Security Question, and Reset Email are checked.**

### **Password Policy**

The password must be unique (i.e. it cannot be similar to your username). Your account will lock out after 4 consecutive incorrect attempts at providing your password. (This will require assistance from your Systems Administrator to unlock.)

Your password will expire every 90 days, requiring you to pick a new password.

Tuesday, November 17, 2009 | Welcome Test User | I Want To | Account Settings | Logout

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

Home » Administration Functions » Update Account Settings

Account Settings

**Messages(1)**  
Please reset your password and select a security question.

**Account Settings**

**NOTE:** In order to change your password and/or reset your security question, please check the appropriate checkboxes below in order to enable the corresponding fields to be editable. After entering the appropriate information, please hit "Save".

User: 000010\_Test

**Reset Password**

Old Password:

New Password:

Confirm New Password:

**Reset Security Question**

Select First Security Question:

Enter Answer to First Question:

Select Second Security Question:

Enter Answer to Second Question:

Select Third Security Question:

Enter Answer to Third Question:

Select Fourth Security Question:

Enter Answer to Fourth Question:

Select Fifth Security Question:

Enter Answer to Fifth Question:

**Reset Email**

**Account Address**

There are no address records on file.

[Contact Us](#)

Click **Save**. The next screen to appear will be the Self Service Employer Home page.

You will be brought to the Terms of Service agreement. As with any type of agreement, you must read carefully. Once you are finished, Click **Accept**



[Home](#)

**Messages(1)**

The user information has been updated.

**Terms Of Service**

**Use of this Website requires that you read and accept the following Terms and Conditions**

**Use of Site**

Access to this Website is restricted to authorized users. An authorized user is any individual designated by the employer as an authorized representative of the employer and who has been assigned a user name and temporary password. The authorized user agrees to reset temporary password upon initial login and never to share the password with any other party. Each employer may authorize more than one Self Service user by completing the form titled "REQUEST NEW USER," and each new authorized user will be assigned a unique user name and temporary password. If an authorized user's employment is terminated or if the authorized user's role no longer requires access, the employer agrees to promptly notify the Carpenter Funds Administrative Office in writing so that the user may be deactivated. Complete the form titled "DEACTIVATE USER," and fax to (510) 562-1702.

The Self Service Website is to be used solely for the purpose of submitting the Employer Report of Contributions and remitting payment to the Carpenter Funds Administrative Office. Some of the information provided on this Website is confidential, including but not limited to Social Security numbers. The copying, distribution, or emailing of the information contained in this Website is prohibited.

[Contact Us](#)

**Common Problems Accessing Employer Self Service**  
**You may encounter one of the following access-related issues when logging in to Self Service:**

|  |   |
|--|---|
| <b>You forget your username</b>  | Click <a href="#">Forgot User</a><br>Enter your email address<br>Submit                                     |
| <b>You forget your password</b>  | Click <a href="#">Contact Us</a>  |
| <b>It has been 90 days since you last changed your password (password expires)</b> | You are required to verify your old password, answer the security questions and enter a new unique password |
| <b>You decide to change your password or security question/answer</b>              | You are required to verify your old password, answer the security questions and enter a new unique password |
| <b>You are unable to access the ERSS website</b>                                   | Click the refresh button.<br>If you are still unable to gain access, call your ERSS Analyst                 |

Forgot Your Username

If you forget your username:

Click the **Forgot Username** link below the **Log In** button.



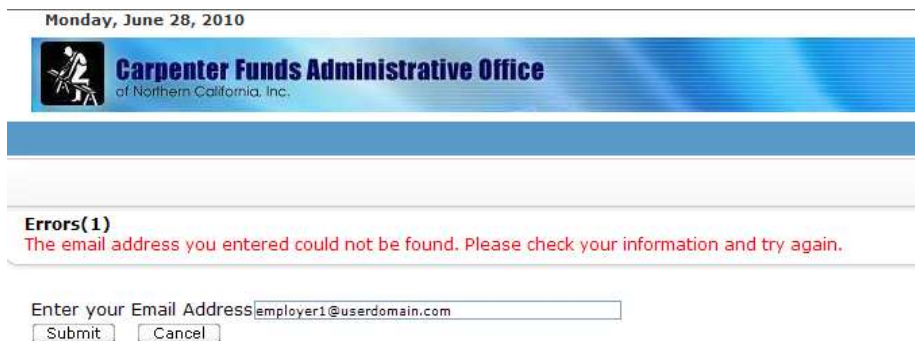
The screenshot shows the top header of the Carpenter Funds Administrative Office website. Below the header is a login form with two input fields: "User:" and "Password:". Below these fields are two buttons: "Log In" and "Forgot User". The "Forgot User" button is circled in red.

The following screen appears



The screenshot shows the same header as the previous image. Below the header is a form with a single input field labeled "Enter your Email Address:". Below the input field are two buttons: "Submit" and "Cancel".

**If the User enters the incorrect email address,** the following will appear:



The screenshot shows the same header as the previous images. Below the header is a date separator: "Monday, June 28, 2010". Below the date separator is the same header. Below the header is a message box with the following text: "Errors(1) The email address you entered could not be found. Please check your information and try again." Below the message box is a form with a single input field labeled "Enter your Email Address:" containing the text "employer1@userdomain.com". Below the input field are two buttons: "Submit" and "Cancel".

The User will need to Contact Us, either Click Contact Us or Email [OnlineERreporting@carpenterfunds.com](mailto:OnlineERreporting@carpenterfunds.com) or Call the Fund Office and ask to speak with the Employer Self Service Staff 510-633-0215 or 888-547-2054

## Forgot Your Password

If you forget your password:

Click the **Forgot Password** link below the **Log In** button

Enter your username.

Click **Submit**. If you do not wish to continue on this screen, click **Cancel** to return to the login screen.

Select the appropriate security question and then enter the correct answer.

Please note that the answer to the security question is NOT case-sensitive.

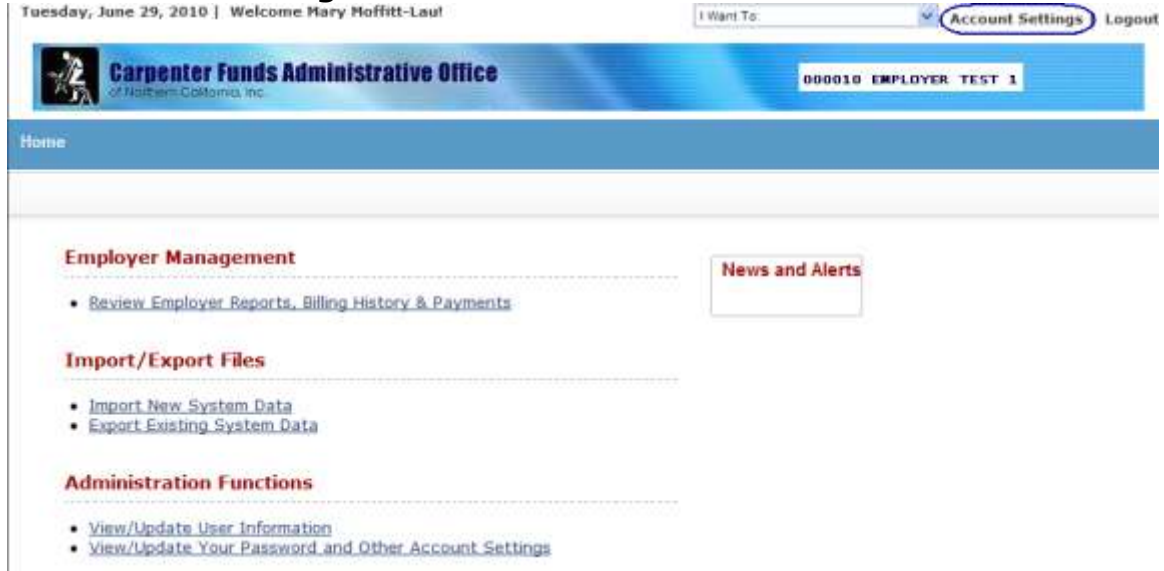
## Changing Your Password or Security Question/Answer

To change your password and security question/answer:

Login to Self Service

Once you have successfully logged in, you are taken to the Self Service Employer Home page.

Click **Account Settings**.



Tuesday, June 29, 2010 | Welcome Mary Moffitt-Laul

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

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

000010 EMPLOYER TEST 1

Home

**Employer Management**

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

**Import/Export Files**

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

**Administration Functions**

- [View/Update User Information](#)
- [View/Update Your Password and Other Account Settings](#)

**News and Alerts**

Once you click **Account Settings**, you are taken to the Account Settings screen. You can choose to reset your password, security question/answer, or both.

Tuesday, June 29, 2010 |  Account Settings | Logout

 **Carpenter Funds Administrative Office**  
of Northern California, Inc. 00010 EMPLOYER TEST 1

Home » Administration Functions » Update Account Settings

Account Settings

**Account Settings**

**NOTE:** In order to change your password and/or reset your security question, please check the appropriate checkboxes below in order to enable the corresponding fields to be editable. After entering the appropriate information, please hit "Save".

User: 00010 EMPLOYER TEST 1

---

**Reset Password**

Old Password:

New Password:

Confirm New Password:

Check the Reset Password box and/or Reset Security Question to indicate what you want to change.  
Click **Save** to update Self Service with your new information.  
If you do not want to save your changes, click the **Home** link just above the tab labeled Account Settings. This will take you back to the Home page.

## EMPLOYER LOGIN & MULTIPLE EMPLOYER ACCESS

Note: This applies only to those who use Self Service for more than one employer.

If you use Self Service for more than one employer, you will see the Multiple Employer Access page immediately after logging. Click on the appropriate employer name.

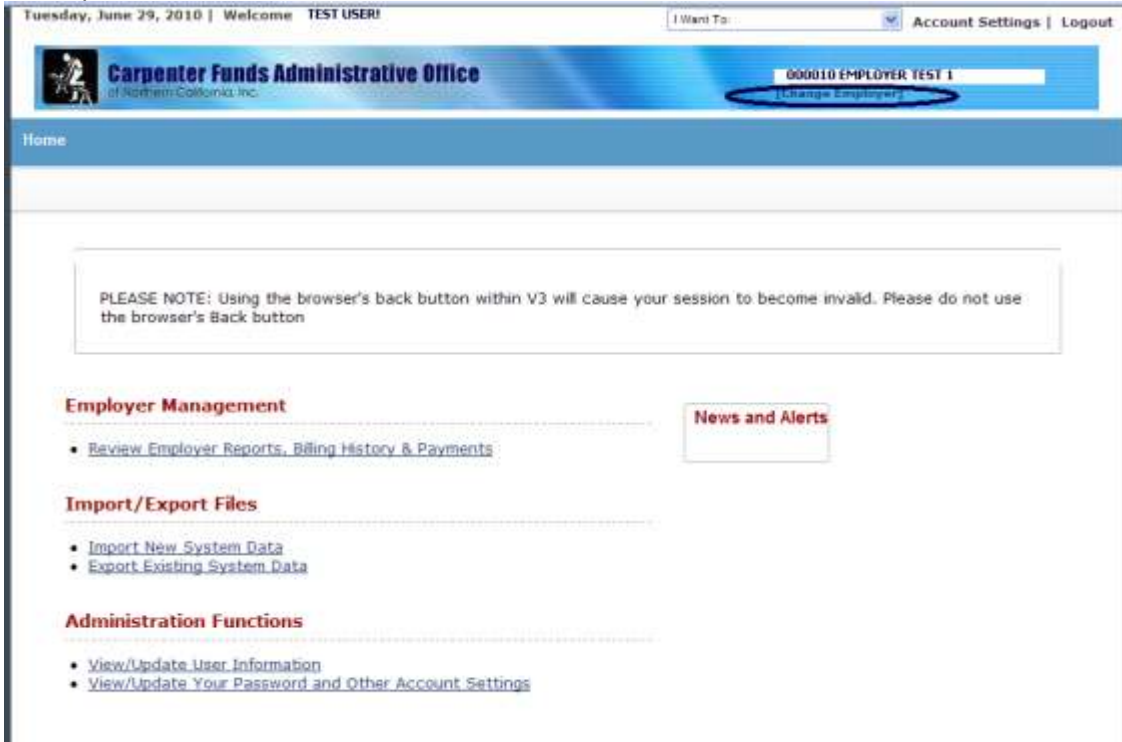


Selecting an employer directs you to the Self Service Employer Home page. The name of the employer you selected will appear in the upper right-hand corner of the screen along with a link to switch to a different employer.

## Switching Employers

To switch employers

Click the **Change Employer** link directly below the current employer name,



You will receive a confirmation box asking you to confirm your decision to switch. Once you click **OK**, you are taken back to the Multiple Employer Access screen. You continue by selecting the next employer you wish to work with.

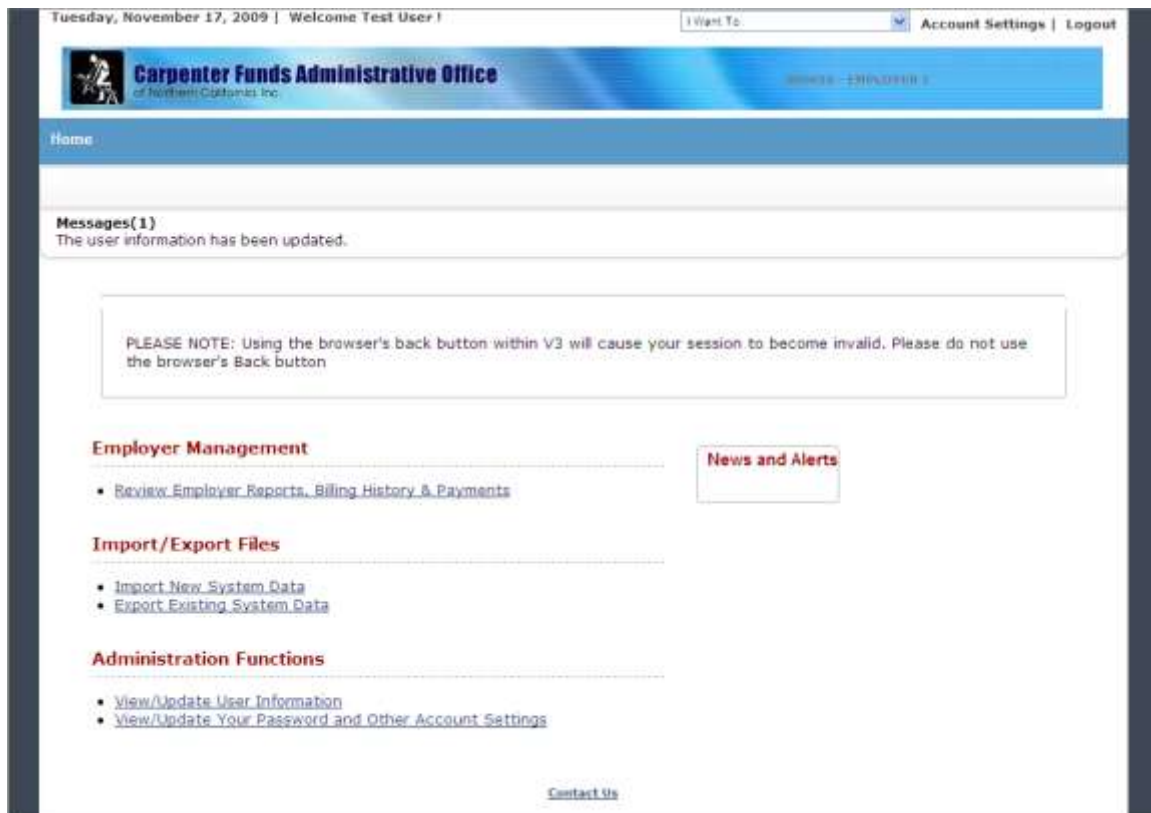


## Chapter 2 - HOME PAGE NAVIGATION

Once you have successfully logged in to Self Service, you are taken to the Self Services Employer Home page. Navigating can be done by either using the drop down tab or the Home Page Components in BOLD.

|                                 |  |
|---------------------------------|--|
| <b>I Want To</b>                | By clicking on the pull-down menu, you see a list of all the pages you can access. You can click on any of the links and be taken to the related page in Self Service. |
| <b>Account Settings</b>         | Takes you to the screen where you can change your password and/or your security question/answer  |
| <b>Logout</b>                   | Takes you out of Self Service and returns you to the Login screen  |
| <b>Employer Name</b>            | Displays the employer you are currently working with   |
| <b>Switching Employers</b>      | If your set up allows for more than one employer account to be processed, you may switch between the account   |
| <b>Messages</b>                 | Displays messages regarding recent transactions  |
| <b>News and Alerts</b>          | Displays information of importance   |
| <b>Employer Management</b>      | Takes you to the screen for viewing and to begin entering data   |
| <b>Import/Export Files</b>      | Takes you to the screens for Importing or Exporting Files  |
| <b>Administration Functions</b> | View or Update User Information and Passwords  |
| <b>Contact Us</b>               | Allows the User to Email ERSS for help   |

**NOTE:** During month-end processing, a specific period of outage will be published in [News and Alerts](#), during this window the Self Service processing selections will be absent from this Home Page.



## Categories and Pages

Categories and pages represent groups of functions and pages that you can access in Self Service. These categories and pages will appear in your location (path).



## EMPLOYER MANAGEMENT

In the Employer Management category, you can:

### **View Employer Reports, Billing History & Payments**


View and Process your Employer Reports and Billing History



## NEWS AND ALERTS

**This box will display important information.** Be sure to review the information in this area. NOTE: Each month in order for CFAO to process Month-End closing, there will be a "period of outage" when you will not have access to the system. The specific period of outage will be published in News and Alerts, and during the window the Self Service processing selections will be absent from the Home Page.

Monday, May 2, 2011 | Welcome | [Account Settings](#) | [Logout](#)


 **Carpenter Funds Administrative Office**  
of Northern California, Inc. 827785 - CARPENTER FUNDS ADMINISTRATIVE

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

**News and Alerts**

ONLINE REPORTING WILL BE UNAVAILABLE FROM 3PM ON 4/29/2011 UNTIL 9AM ON 5/3/2011 DUE TO MONTH-END PROCESSING



## Employer Reports

Employer reports must be entered into Self Service through:

**Report Entry though Work Report Editor** You can enter your employer report information online. For regular employer reports, a predefined list of your members will be presented. Enter hours, change occupations, adjust skill levels, and get your total due amount for payment.

You may print and save a copy of the completed billing to your computer.

## Import/Export Files

**This portion of ERSS is not yet available.**

Tuesday, June 29, 2010 | Welcome Test User | I Want To: Account Settings | Logout

**Carpenter Funds Administrative Office**  
of Northern California, Inc. 000010 EMPLOYER TEST 1

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](#)

**News and Alerts**

**Import/Export Files** This portion of ERSS is currently under construction.

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

**Administration Functions**

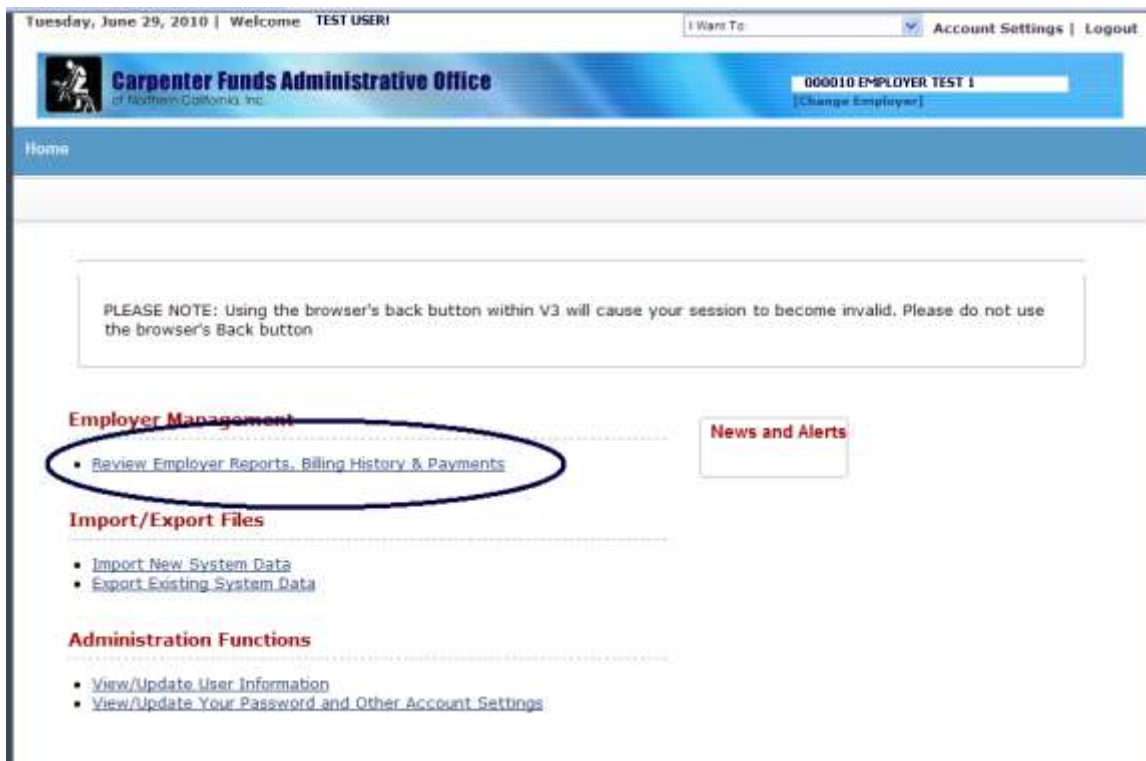
- [View/Update User Information](#)
- [View/Update Your Password and Other Account Settings](#)

[Contact Us](#)

**Chapter 3 to access Employer Management to process Billing Reports use either of the links shown:**

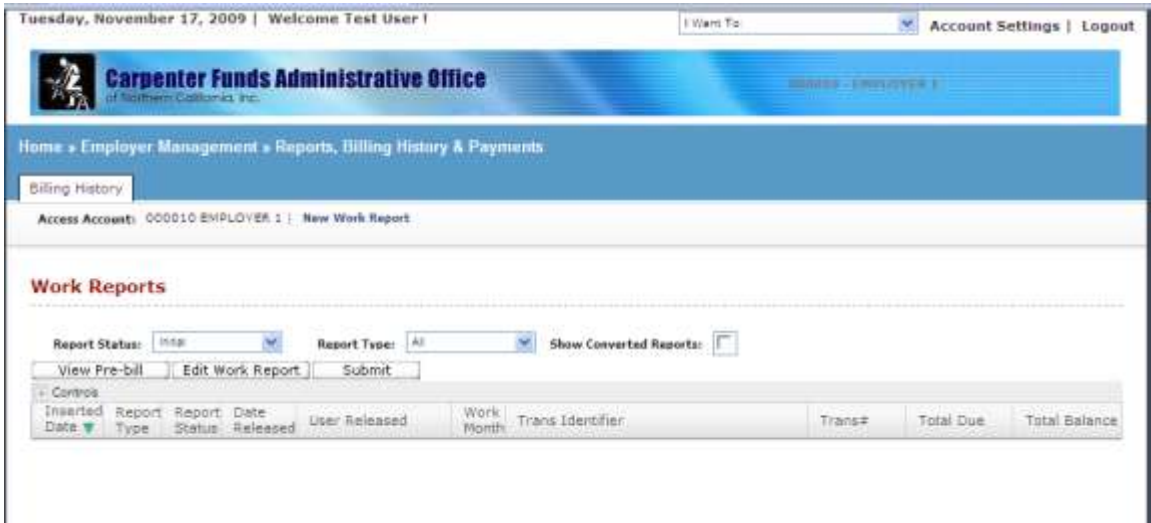


**OR**



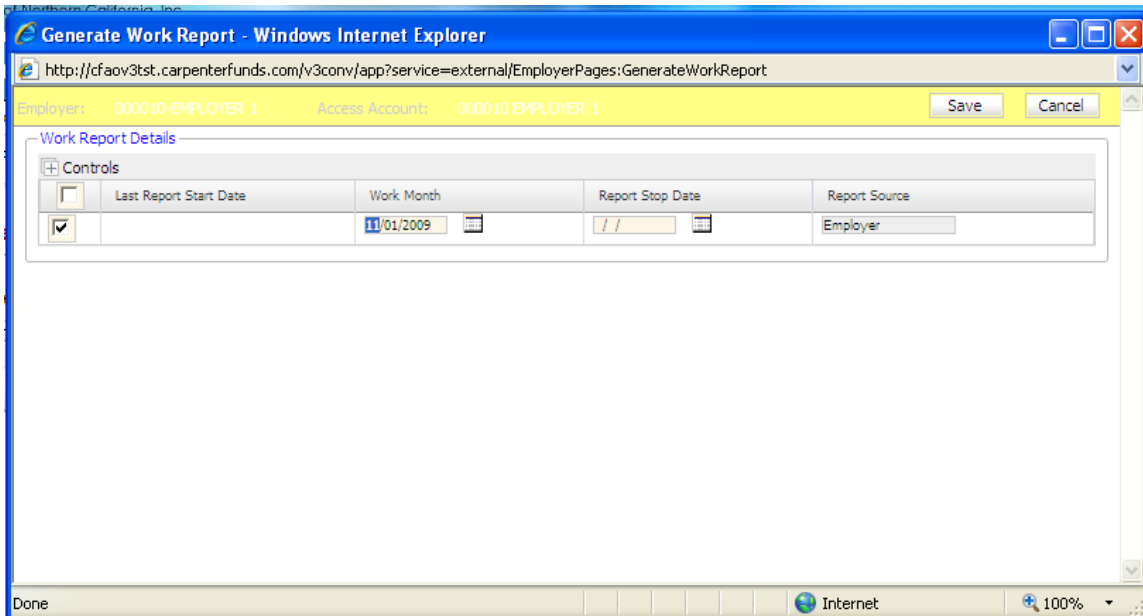
### Chapter 3 Overview of Processing Work Reports –

1. User may enter data in a Work Report that is in **Initial** Status only
2. Initial Billing Report will default to the month after the last work month submitted.
3. If entering a new employee, verify the name and social security number match the data in our database. If incorrect, reenter data. If the name does not populate, Contact Us for assistance.
4. View the **Summary** prior to **Submit**. You will not be able to Edit a report that has been submitted.
5. If you **receive Error Messages**, you are able to correct the Error(s) prior to Submit
6. Never use the Browser Back Button. This will cause the session to end and any unsaved data will be lost.
7. The following steps must be performed to process the Billing Report:
  - a. Create New Report
  - b. Save and Close window
  - c. Highlight the new report which is in "Initial Status"
  - d. Enter hours for each employee under H&W
  - e. SAVE
  - f. Review Report Summary
  - g. Correct Error(s) if possible
  - h. Review Report
  - i. Submit
  - j. Save a copy of the file on your Network for your records
  - k. Print a Deposit Slip
  - l. Complete the Deposit slip using totals from Summary report.
  - m. Mail Deposit slip, Summary Page and your check to the Bank address provided.

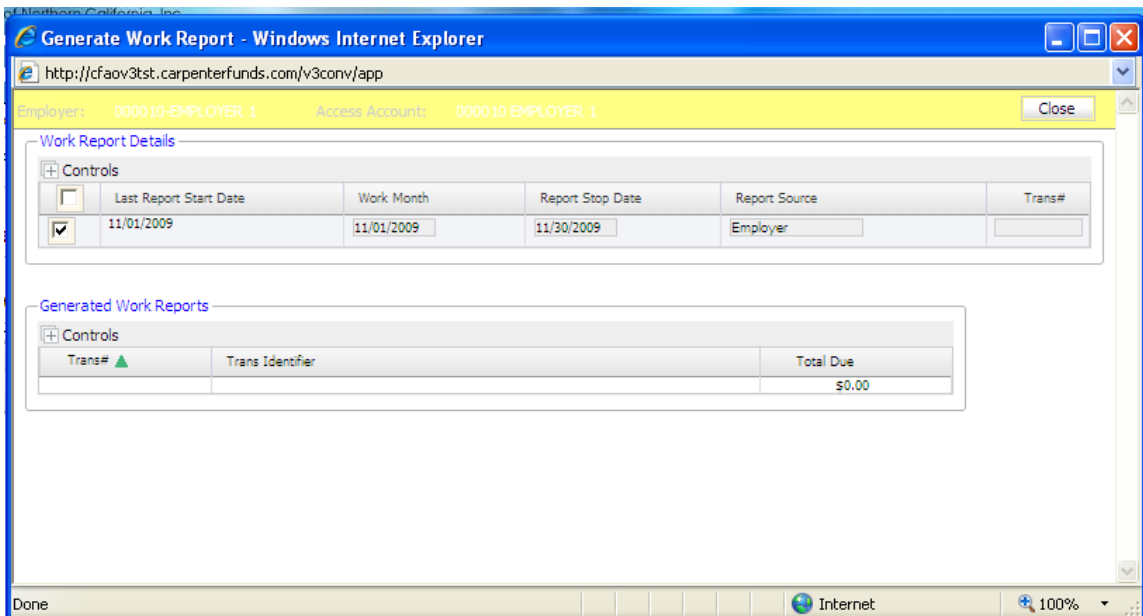


To create and edit an employer report, select **New Work Report**  
 Note: You will need to create a new employer report for both report entry and import file



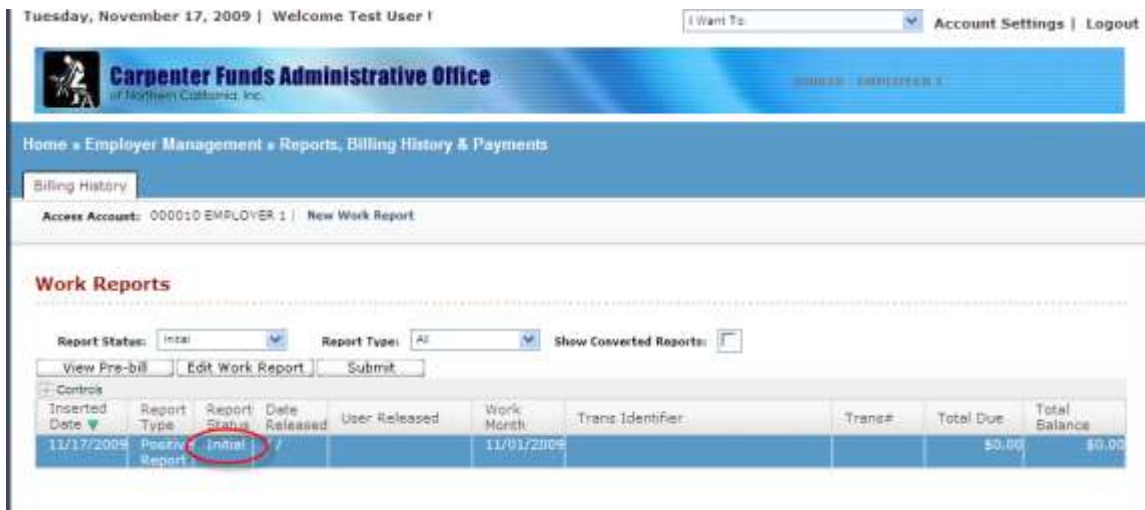


The default is to give you the month after the last month that was reported, if this is not the desired month you may change it.  
 The "Work Month" is always the 1<sup>st</sup> of the month and (Month/01/Year) the "Report Stop Date" is the last day of the month, in this case the 31<sup>st</sup>, (Month/Last Day/Year)  
 You are unable to redo months that have previously been processed. Enter in the desired month then click **Save**



This screen will appear as confirmation, select **Close**

You now have an employer report in **"Initial"** status to enter your hours and add employees



|                  |   |
|------------------|---|
| Access Account   | Displays account number and employer name   |
| New Work Report  | Creates an initial Billing Report   |
| Report Status    | Drop down which allows the view or ALL reports, reports in Prebill status, Released reports or Initial reports. |
| Report Type      | Drop down to view Positive Reports, Adjustments or Rebill   |
| View Pre-Bill    | Allows you to View reports that have been submitted   |
| Edit Work Report | Allows you to update a report in Initial Status   |
| Submit           | Submits the Billing Report to CFAO for processing. Once the report is Submitted, you may NOT make any changes   |
| + Controls       | To view hours/amounts for each employee under a rate group  |
| Inserted Date    | Date report was created or most recent status change  |
| Report Type      | Positive or negative  |
| Report Status    | Initial, pre-bill or processed  |
| Date Released    | Date Fund Office processes and releases report  |
| User Released    | Fund Office Analyst   |
| Work Month       | Month Hours were reported for   |
| Trans Identifier | Quickly identifies type of transaction  |
| Trans #          | Unique number assigned to transaction   |
| Total Due        | Sum total of report (Cash Summary)  |
| Total Balance    | Sum of any discrepancies  |

**Only reports with the Report Status "Initial" are available for entry.**  
Highlight (click) the row for the work month you wish to process.  
Then click the **Edit Work Report** button and the Work Report Editor will open displaying the Work Report Editor for the highlighted account.

Tuesday, November 17, 2009 | Welcome Test User | I Want To: Account Settings | Logout

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

Home » Employer Management » Reports, Billing History & Payments

Billing History

Access Account: 000010 EMPLOYER 1 | New Work Report

### Work Reports

Report Status: Initial Report Type: All Show Converted Reports:

View Pre-bill **Edit Work Report** Submit

| Controls      |                 |               |               |               |            |                  |        |           |               |  |
|---------------|-----------------|---------------|---------------|---------------|------------|------------------|--------|-----------|---------------|--|
| Inserted Date | Report Type     | Report Status | Date Released | User Released | Work Month | Trans Identifier | Trans# | Total Due | Total Balance |  |
| 11/17/2009    | Positive Report | Initial       | / /           |               | 11/01/2009 |                  |        | \$0.00    | \$0.00        |  |

Employer: 000010-EMPLOYER 1 Access Account: 000010-EMPLOYER 1

**Filter**

Access Account:  Report Status:

Member Count:  Row Count:  Date Received:

**Controls**

**Billing History**

| SSN         | Participant     | Rate Grouping        | Gcc | SKL            |
|-------------|-----------------|----------------------|-----|----------------|
| 111-11-1116 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1119 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | J - Journeyman |

Page Totals:

Report Totals:

If you would like your roster in a different order you can Sort By:  
 Custom  
 Enter Order  
 SSN  
 Name

**Controls**

| SkL            | Start Date | Stop Date  | Status | HW  | PN  | VA  | VB  | CA  | AF |
|----------------|------------|------------|--------|-----|-----|-----|-----|-----|----|
| J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 |    |
| J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 |    |

Scroll to the right to see the columns for the various Trust Fund hours  
 Enter the hours in the Health & Welfare (H&W) column only for each employee  
 upon saving your report the hours will spread to all funds that apply to each  
 employee's occupation and job classification.

**See Occupation/Skill Code Table in Appendix A to look up the combinations**

**NOTE: You must enter the minimum number of hours for Superintendents and Owners in the proper Fund Columns, refer to the Master Agreement.**

**Filter**

Access Account: 000010 EMPLOYER 1      Report Status: Initial

Member Count: 5      Row Count: 5      Date Received: / /

**Controls**

Add    View Summary    20 Records

View Report    Search    Clear Search    Sort By: Custom

| SSN         | Participant     | Occ | SkL            | Start Date | Stop Date  | Status | HW  | PN |
|-------------|-----------------|-----|----------------|------------|------------|--------|-----|----|
| 111-11-1116 | EMPLOYEE, FIVE  | C   | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 |    |
| 111-11-1115 | EMPLOYEE, FOUR  | C   | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 |    |
| 111-11-1112 | EMPLOYEE, ONE   | C   | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 |    |
| 111-11-1117 | EMPLOYEE, SIX   | C   | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 |    |
| 111-11-1114 | EMPLOYEE, THREE | C   | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 |    |
| 111-11-1113 | EMPLOYEE, TWO   | C   | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 |    |

600 0

600 0

Save    Cancel

**Filter**

Access Account: 000010 EMPLOYER 1      Report Status: Initial

Member Count: 5      Row Count: 5      Date Received: 11/17/2009

**Controls**

Add    View Summary    20 Records

View Report    Search    Clear Search    Sort By: Custom

| SSN         | Participant     | ⌘  | Stop Date  | Status | HW  | PN  | VA  | VB  | CA  | AP  | WP  | EA  | IP | WC |
|-------------|-----------------|----|------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|----|----|
| 111-11-1116 | EMPLOYEE, FIVE  | 09 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 111-11-1115 | EMPLOYEE, FOUR  | 09 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 111-11-1112 | EMPLOYEE, ONE   | 09 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 111-11-1117 | EMPLOYEE, SIX   | 09 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 111-11-1114 | EMPLOYEE, THREE | 09 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 111-11-1113 | EMPLOYEE, TWO   | 09 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |

600 600 600 600 600 600 600 600 0 0

600 600 600 600 600 600 600 600 0 0

If you want to do a search for a Job Rate Grouping, Work Month, Pay Code, SSN, Job Category, Report Stop Date, and Status Click **Search** to open the search window

**Filter**

Access Account: 000010 EMPLOYER 1      Report Status: Initial  
 Date Received: 11/17/2009

Member Count: 6      Row Count: 4

---

**Controls**

Add    View Summary    20 Records  
 View Report    **Search**    Clear Search    Sort By: Count

| ISN        | Participant     | Stop Date     | Status | HW  | PN  | VA  | VB  | CA  | AP  | WP  | IA  | IP | WC |
|------------|-----------------|---------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|----|----|
| 11-11-1116 | EMPLOYEE, FIVE  | 09 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 11-11-1115 | EMPLOYEE, FOUR  | 09 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 11-11-1112 | EMPLOYEE, ONE   | 09 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 11-11-1117 | EMPLOYEE, SIX   | 09 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 11-11-1114 | EMPLOYEE, THREE | 09 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
| 11-11-1113 | EMPLOYEE, TWO   | 09 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |    |    |
|            |                 |               |        | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 0  | 0  |
|            |                 |               |        | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 0  | 0  |

Enter the data you are searching for and click **OK**

**Filter Criteria**

Show Selected: [v]  
 Rate Grouping: [v]  
 Work Month: [//] [calendar]  
 Occ: [v]

SSN: Click to choose an SSN  
 Job Category: [v]  
 Report Stop Date: [//] [calendar]  
 Status: [v]

OK    Cancel

### Editing Member Information on Your Employer Report

On the Work Report Editor screen, you can:

Add existing members to the employer report.

Delete members from the report.

Edit member data (including occupation, skill leaves, and status).

## Add an Existing Member

To add an existing member on the Work Report Editor screen:  
Click **Add**

The screenshot shows the 'Work Report Editor' interface. At the top is a 'Filter' section with fields for 'Access Account' (000010 EMPLOYER 1), 'Report Status' (Initial), 'Date Received' (11/17/2009), 'Member Count' (6), and 'Row Count' (6). Below this is a 'Controls' section containing several buttons: 'Add' (circled in red), 'View Summary', 'View Report', 'Search', 'Clear Search', and a 'Sort By' dropdown menu set to 'Custom'. A '20 Records' icon is also present. At the bottom is a 'Billing History' table with columns for checkboxes, SSN, Participant, Rate Grouping, and Occ.

|                          | SSN         | Participant    | Rate Grouping        | Occ |
|--------------------------|-------------|----------------|----------------------|-----|
| <input type="checkbox"/> | 111-11-1116 | EMPLOYEE, FIVE | CARPENTER MASTER AGC | C   |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR | CARPENTER MASTER AGC | C   |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE  | CARPENTER MASTER AGC | C   |

This will open up a new line at the top of the Billing your Employer Report list  
Type the social security number for the existing member in the SSN field,  
and then press **Enter** or **Tab**.

If the employees SSN is in our system it will populate the name

This screenshot shows the 'Add' button in the 'Controls' section. Below it, the 'Billing History' table has a new row at the top with an empty SSN field circled in red. The rest of the table content is the same as in the previous screenshot.

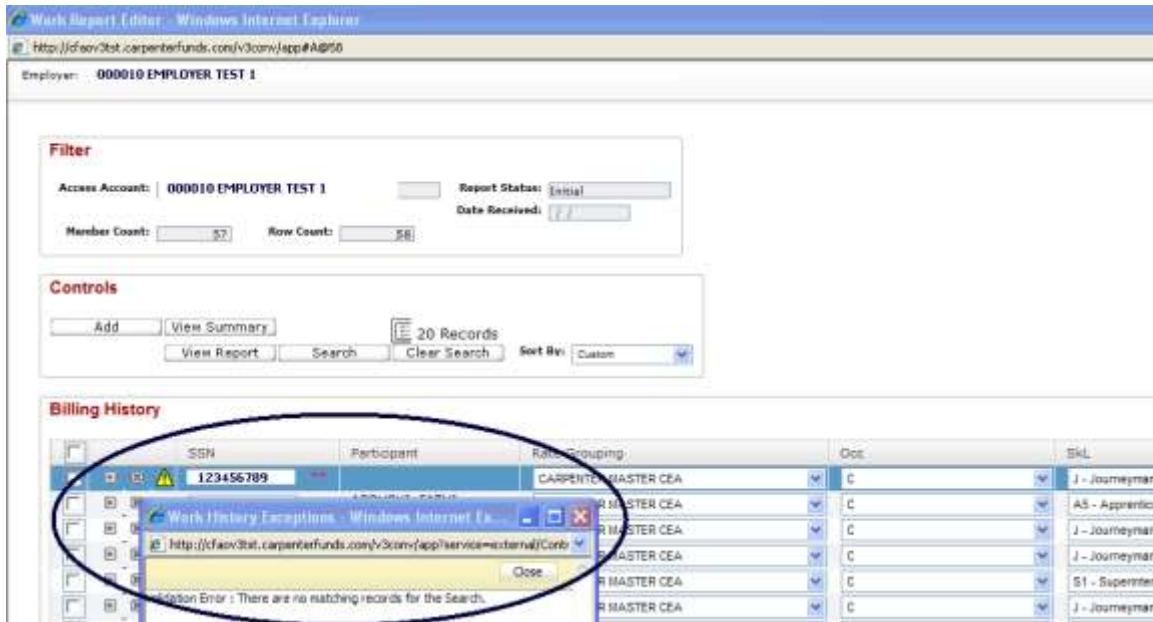
|                          | SSN         | Participant     | Rate Grouping        | Occ | SkL            |
|--------------------------|-------------|-----------------|----------------------|-----|----------------|
| <input type="checkbox"/> |             |                 | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1116 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | J - Journeyman |

This screenshot shows the 'Billing History' table after the 'Add' action. The new row at the top is now populated with data: SSN 111-11-1118, Participant EMPLOYEE, Rate Grouping CARPENTER MASTER AGC, Occ C, and SkL J - Journeyman.

|                          | SSN         | Participant    | Rate Grouping        | Occ | SkL            |
|--------------------------|-------------|----------------|----------------------|-----|----------------|
| <input type="checkbox"/> | 111-11-1118 | EMPLOYEE       | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1116 | EMPLOYEE, FIVE | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR | CARPENTER MASTER AGC | C   | J - Journeyman |

Enter the required employer report information by scrolling to the right for the member's entry in the work report (Occ/Skl/Status).

If you attempted to ADD an employee that is not in our database, the following Yield Sign will appear, Click the yield sign to view the message.

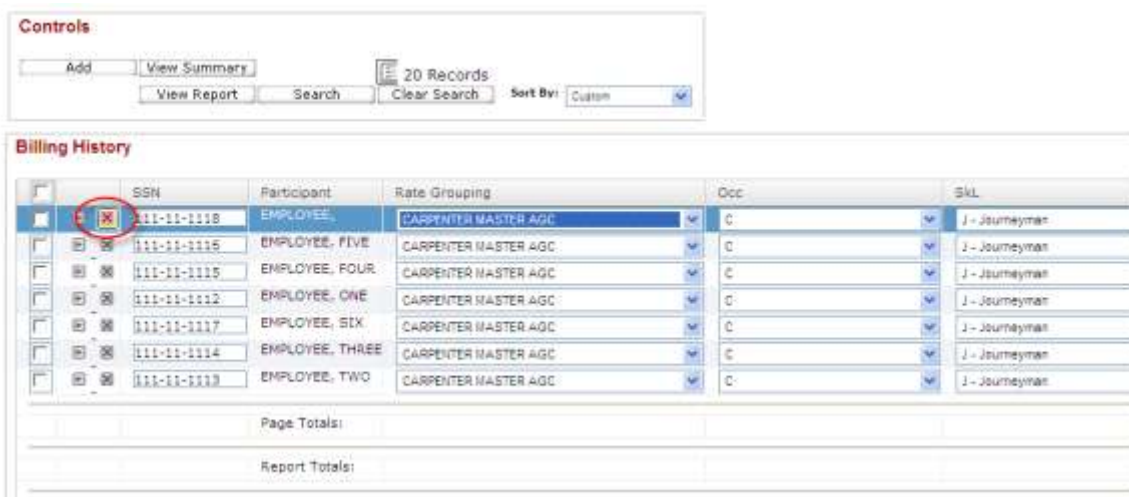


Verify you have entered the correct Social Security Number of the employee. If it is correct, you must CONTACT US to have the employee added to the Database. Once we have Added the employee, you will be able to enter the work hours.

### Deleting an employee from your report

To delete an employee from the report, click the "X" just to the left of the SSN.

Note: *The employee is being deleted from this report only; the employee will appear on your next Employer Bill.*



## Terminate an Employee

To terminate an employee on the report, select the drop down in the status column to "TRM". You must enter the last hours worked OR zero.

*Note: This employee will not show up on your next Employer Bill.*

Add View Summary 20 Records View Report Search Clear Search Sort By: Custom

| N         | Participant     | Skil           | Start Date | Stop Date  | Status | HW  | PH  | VA  | VB  | CA  | AP |
|-----------|-----------------|----------------|------------|------------|--------|-----|-----|-----|-----|-----|----|
| 1-11-1118 | EMPLOYEE,       | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    |     |     |     |     |     |    |
| 1-11-1116 | EMPLOYEE, FIVE  | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 |    |
| 1-11-1115 | EMPLOYEE, FOUR  | J - Journeyman | 11/01/2009 | 11/30/2009 | ACT    | 100 | 100 | 100 | 100 | 100 |    |
| 1-11-1112 | EMPLOYEE, ONE   | J - Journeyman | 11/01/2009 | 11/30/2009 | HLD    | 100 | 100 | 100 | 100 | 100 |    |
| 1-11-1117 | EMPLOYEE, SIX   | J - Journeyman | 11/01/2009 | 11/30/2009 | CAH    | 100 | 100 | 100 | 100 | 100 |    |
| 1-11-1114 | EMPLOYEE, THREE | J - Journeyman | 11/01/2009 | 11/30/2009 | CA     |     |     |     |     |     |    |
| 1-11-1113 | EMPLOYEE, TWO   | J - Journeyman | 11/01/2009 | 11/30/2009 | VACA   | 100 | 100 | 100 | 100 | 100 |    |
|           |                 |                |            |            | ACAH   | 100 | 100 | 100 | 100 | 100 |    |
|           |                 |                |            |            | VAH    |     |     |     |     |     |    |
|           |                 |                |            |            | VABH   |     |     |     |     |     |    |
|           |                 |                |            |            | VA     | 600 | 600 | 600 | 600 | 600 |    |
|           |                 |                |            |            | VAB    |     |     |     |     |     |    |
|           |                 |                |            |            | ABCA   |     |     |     |     |     |    |
|           |                 |                |            |            | ABCH   | 500 | 500 | 500 | 500 | 500 |    |
|           |                 |                |            |            | VBCA   |     |     |     |     |     |    |
|           |                 |                |            |            | BCAH   |     |     |     |     |     |    |
|           |                 |                |            |            | VBH    |     |     |     |     |     |    |
|           |                 |                |            |            | VB     |     |     |     |     |     |    |
|           |                 |                |            |            | TRM    |     |     |     |     |     |    |

### View Due Amounts or Erase Amounts for an employee

While entering your report, click on the **Arrow** to the left of the SSN in order to view due amounts and erase amounts for the employee.

**Billing History**

| <input type="checkbox"/> | SSN         | Participant    | Rate Grouping |
|--------------------------|-------------|----------------|---------------|
| <input type="checkbox"/> | 111-11-1118 | EMPLOYEE,      | CARPENTER MAS |
| <input type="checkbox"/> |             | EMPLOYEE, FIVE | CARPENTER MAS |
| <input type="checkbox"/> |             | EMPLOYEE, FOUR | CARPENTER MAS |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE  | CARPENTER MAS |
| <input type="checkbox"/> | 111-11-1117 | EMPLOYEE, SIX  | CARPENTER MAS |

A red circle highlights the right-pointing arrow icon next to the SSN '111-11-1118'. A dropdown menu is open from this arrow, showing two options: 'Due Amounts' and 'Erase Amounts', both of which are also circled in red.

## Save Work Report & Save Messages

After verifying that all hours are correct on the Work Report Editor click the **Save** button at the bottom of the display.

If there are any Message(s), they will be displayed at the top of the screen:

The screenshot shows the 'Work Report Editor' window in Internet Explorer. At the top, there are messages: 'Messages(4)' with details about reporting rules for Jane Carpenter, Joe Carpenter, and Joe Apprentice 9. Below the messages is a 'Filter' section with fields for 'Access Account: 000010 EMPLOYER 1', 'Report Status: Initial', 'Date Received: 06/29/2010', 'Member Count: 57', and 'Row Count: 57'. A 'Controls' section contains buttons for 'Add', 'View Summary', 'View Report', 'Search', 'Clear Search', and a 'Sort By: Custom' dropdown menu. At the bottom, there is a 'Billing History' section.

If any modifications are needed after saving, click the **Edit** button at the bottom of the screen, make your changes, then click **Save** again.

This screenshot shows the 'Billing History' section of the interface. It features a table with columns for checkboxes, SSN, Participant, Rate Grouping, Occ, and SkL. The table lists seven employees with their respective SSNs and roles. Below the table are 'Page Totals:' and 'Report Totals:' fields. At the bottom center, there is a red circle around an 'Edit' button, with a 'Close' button next to it.

|                          | SSN         | Participant     | Rate Grouping        | Occ | SkL            |
|--------------------------|-------------|-----------------|----------------------|-----|----------------|
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | 3 - Journeyman |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | 3 - Journeyman |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | 3 - Journeyman |
| <input type="checkbox"/> | 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | 3 - Journeyman |
| <input type="checkbox"/> | 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | 3 - Journeyman |
| <input type="checkbox"/> | 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | 3 - Journeyman |
| <input type="checkbox"/> | 111-11-1118 | EMPLOYEE,       | CARPENTER MASTER AGC | C   | 3 - Journeyman |

After saving your Work Report, click the **View Summary** button.

Access Account: 000010\_EMPLOYER\_1 Report Status: Initial  
Date Received: 11/17/2009  
Member Count: 7 Row Count: 7

**Controls**

View Summary (circled in red) View Report Search Clear Search 20 Records Sort By: Custom

**Billing History**

| SSN         | Participant     | Rate Grouping        | Occ | SkL            |
|-------------|-----------------|----------------------|-----|----------------|
| 111-11-1116 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1115 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | J - Journeyman |
| 111-11-1118 | EMPLOYEE,       | CARPENTER MASTER AGC | C   | J - Journeyman |

Page Totals:  
Report Totals:

Edit Close

The bill summary pop-up will appear. Click on **Show Hours** to verify that the hours are correct prior to submitting the report.

Employer: 000010-EMPLOYER 1 Access Account: 000010 EMPLOYER 1

**Filter**

Access Account: 000010 EMPLOYER 1 Report Status: Initial  
Date Received: 11/17/2009  
Member Count: 7 Row Count: 7

**WORK\_HISTORY\_SUMMARY**

View Details  Show Hours  Show Funds  Show Contributions Due

| Rate Grouping | Job Category         | Occupation         | Skill Level | Funds Total |             |
|---------------|----------------------|--------------------|-------------|-------------|-------------|
| +             | CARPENTER MASTER AGC | Carpenter CA or CS | C           | J           | \$0.00      |
| +             | CARPENTER MASTER AGC | Carpenter Jrnyman  | C           | J           | \$12,690.00 |
|               |                      |                    |             |             | \$12,690.00 |

Save Cancel

To look at the hours and amounts per employee click on the **plus (+)** sign by the Rate Grouping.

**Filter**

Access Account: 000010 EMPLOYER 1 Report Status: Initial

Member Count: 7 Row Count: 7 Date Received: 11/17/2009

**WORK\_HISTORY\_SUMMARY**

View Details  Show Hours  Show Funds  Show Contributions Due

| Rate Grouping  | Job Category       | Occupation | Skill Level | HW  | PN  | VA  | VB  | CA  | AP  | WP  | IA  | IP | WC | Funds Total |
|--|--------------------|------------|-------------|-----|-----|-----|-----|-----|-----|-----|-----|----|----|-------------|
| <input checked="" type="checkbox"/> CARPENTER MASTER AGC | Carpenter CA or CS | C          | J           |     |     |     |     |     |     |     |     |    |    | \$0.00      |
| <input checked="" type="checkbox"/> CARPENTER MASTER AGC | Carpenter Jrnyman  | C          | J           | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 600 |    |    | \$12,690.00 |
|  |                    |            |             | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 600 | 0  | 0  | \$12,690.00 |

Save Cancel

After verifying the report, click **View Details** to return to Work Report Edit page.

Employer: 000010-EMPLOYER 1 Access Account: 000010 EMPLOYER 1

**Filter**

Access Account: 000010 EMPLOYER 1 Report Status: Initial

Member Count: 7 Row Count: 7 Date Received: 11/19/2009

**WORK\_HISTORY\_SUMMARY**

View Details  Show Hours  Show Funds  Show Contributions Due

| Rate Grouping  | Job Category       | Occupation | Skill Level | Funds Total |
|--|--------------------|------------|-------------|-------------|
| <input checked="" type="checkbox"/> CARPENTER MASTER AGC | Carpenter CA or CS | C          | J           | \$0.00      |
| <input checked="" type="checkbox"/> CARPENTER MASTER AGC | Carpenter Jrnyman  | C          | J           | \$12,690.00 |
|  |                    |            |             | \$12,690.00 |

Save Cancel

**Save** or **Cancel** will return you to the Billing History page.

**Filter**

Access Account:  Report Status:

Member Count:  Row Count:

Date Received:

**WORK\_HISTORY\_SUMMARY**

Show Hours
  Show Funds
  Show Contributions Due

|                          | Rate Grouping        | Job Category       | Occupation | Skill Level | Funds Total |
|--------------------------|----------------------|--------------------|------------|-------------|-------------|
| <input type="checkbox"/> | CARPENTER MASTER AGC | Carpenter CA or CS | C          | J           | \$0.00      |
| <input type="checkbox"/> | CARPENTER MASTER AGC | Carpenter Jrnyman  | C          | J           | \$12,690.00 |
|                          |                      |                    |            |             | \$12,690.00 |

Highlight the desired work month; the last month processed will automatically be at the top and highlighted, and select Edit Work Month.

Report Status:   
Date Received:

View Summary  View Report Search Clear Search Sort By: Custom

|        | Rate Grouping                | Occ          | Skl                     | Start Date | Stop Date  | Status | HW    | PN    | VA    | VB |       |
|--------|------------------------------|--------------|-------------------------|------------|------------|--------|-------|-------|-------|----|-------|
|        | RA CARPENTER MASTER 3C INDEP | C            | A1 - Apprentice Level 1 | 05/01/2009 | 05/31/2009 | ACT    | 51    |       | 51    |    | 51    |
|        | BIG OAK DR                   | D            | J - Journeyman          | 05/01/2009 | 05/31/2009 | ACT    |       |       |       |    |       |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | U4 - Res. Carp. Class 2 | 05/01/2009 | 05/31/2009 | ACT    | 32    |       | 32    |    | 32    |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | U4 - Res. Carp. Class 2 | 05/01/2009 | 05/31/2009 | ACT    |       |       |       |    |       |
| Z, AME | RA CARPENTER MASTER 3C INDEP | R - Resident | U4 - Res. Carp. Class 2 | 05/01/2009 | 05/31/2009 | ACT    | 123.9 |       | 123.9 |    | 123.9 |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | U1 - Res. Carp. Class 1 | 05/01/2009 | 05/31/2009 | ACT    | 147.5 |       | 147.5 |    | 147.5 |
| JANDR  | RA CARPENTER MASTER 3C INDEP | R - Resident | U1 - Res. Carp. Class 1 | 05/01/2009 | 05/31/2009 | ACT    | 173.9 |       | 173.9 |    | 173.9 |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | U4 - Res. Carp. Class 2 | 05/01/2009 | 05/31/2009 | ACT    | 181   |       | 181   |    | 181   |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | U1 - Res. Carp. Class 1 | 05/01/2009 | 05/31/2009 | ACT    | 137.9 |       | 137.9 |    | 137.9 |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | U4 - Res. Carp. Class 2 | 05/01/2009 | 05/31/2009 | ACT    | 170.9 |       | 170.9 |    | 170.9 |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | J1 - Res. Carp. Jrnyman | 05/01/2009 | 05/31/2009 | ACT    | 84    | 84    | 84    |    | 84    |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | J1 - Res. Carp. Jrnyman | 05/01/2009 | 05/31/2009 | ACT    | 142.9 | 142.9 | 142.9 |    | 142.9 |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | J1 - Res. Carp. Jrnyman | 05/01/2009 | 05/31/2009 | ACT    | 143   | 143   | 143   |    | 143   |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | J1 - Res. Carp. Jrnyman | 05/01/2009 | 05/31/2009 | ACT    | 117   | 117   | 117   |    | 117   |
|        | RA CARPENTER MASTER 3C INDEP | R - Resident | J1 - Res. Carp. Jrnyman | 05/01/2009 | 05/31/2009 | ACT    | 86.9  | 86.9  | 86.9  |    | 86.9  |

Make sure that the hours are as desired. Until you submit you will still be able to make changes to the report such as hours, Occ, Skill, etc.

Once you have verified hours are correct select **Save** at the bottom.

**Filter**

Access Account: 000010\_EMPLOYER\_1 Report Status: Initial  
Date Received: 11/19/2009  
Member Count: 7 Row Count: 7

**Controls**

Add View Summary 20 Records  
Add New View Report Search Clear Search Sort By: Custom

**Billing History**

|                          | SSN         | Participant     | Rate Grouping        | Occ | SkL            |
|--------------------------|-------------|-----------------|----------------------|-----|----------------|
| <input type="checkbox"/> | 111-11-1118 | EMPLOYEE,       | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1116 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | J - Journeyman |

Page Totals:  
Report Totals:

Save Cancel

**A copy of the Summary page must be printed and submitted with your remittance:**

**Filter**

Access Account: 000010\_EMPLOYER\_1 Report Status: Initial  
Date Received: 11/19/2009  
Member Count: 7 Row Count: 7

**Controls**

Add View Summary 20 Records  
Add New View Report Search Clear Search Sort By: Custom

**Billing History**

|                          | SSN         | Participant     | Rate Grouping        | Occ | SkL            |
|--------------------------|-------------|-----------------|----------------------|-----|----------------|
| <input type="checkbox"/> | 111-11-1118 | EMPLOYEE,       | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1116 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | J - Journeyman |

Page Totals:  
Report Totals:

Work Report Entry - Windows Internet Explorer  
 http://www306.cafonds.com/0306/acc  
 Employer: 030425-NISEK GROUP ASSOCIATES INC Access Account: 030425-NISEK GROUP ASSOCIATES INC

**Filter**

Access Account:  Report Status:  Trans#:   
 Date Released:  From Type:   
 Items Identifier:   
 Number Count:  Row Count:

**WORK\_HISTORY\_SUMMARY**

View Details  Show Hours  Show Funds  Show Contributions Due

| Rate Grouping | Job                  | Occupation | Rate | HW | PH  | VA  | VB  | CA  | AF  | WP  | IA  | IF  | WC  | HW          | PH         | VA       | VB       | CA         | AF       | WP      | IA      | IF     | WC      | Funds Total |
|---------------|----------------------|------------|------|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------------|------------|----------|----------|------------|----------|---------|---------|--------|---------|-------------|
| 01            | CARPENTER MASTER CEA | Carpenter  | C    | J  | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 200 | \$993.00    | \$555.00   | \$230.00 | \$144.00 | \$205.00   | \$53.00  | \$5.00  | \$18.00 | \$5.00 | \$14.00 | \$2,129.00  |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    | DI | 145 | 145 |     | 145 |     |     |     |     | 145 | \$1,312.20  | \$604.75   | \$0.00   | \$0.00   | \$297.25   | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$18.15 | \$2,454.40  |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 24  |     |     |     |     |     |     |     |     | \$0.00      | \$0.00     | \$0.00   | \$0.00   | \$0.00     | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$0.00  | \$0.00      |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 41  |     |     |     |     |     |     |     |     | \$0.00      | \$0.00     | \$0.00   | \$0.00   | \$0.00     | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$0.00  | \$0.00      |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 45  | 45  | 45  | 45  | 45  | 45  | 45  | 45  | 45  | \$407.25    | \$249.75   | \$99.00  | \$73.36  | \$199.76   | \$23.88  | \$2.25  | \$8.33  | \$2.00 | \$1.15  | \$1,056.90  |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 42  |     |     |     |     |     |     |     |     | \$0.00      | \$0.00     | \$0.00   | \$0.00   | \$0.00     | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$0.00  | \$0.00      |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 43  |     |     |     |     |     |     |     |     | \$0.00      | \$0.00     | \$0.00   | \$0.00   | \$0.00     | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$0.00  | \$0.00      |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 43  |     |     |     |     |     |     |     |     | \$0.00      | \$0.00     | \$0.00   | \$0.00   | \$0.00     | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$0.00  | \$0.00      |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 45  | 1   | 1   | 1   | 1   | 1   | 1   | 1   | 1   | \$9.05      | \$5.55     | \$2.30   | \$1.44   | \$2.25     | \$0.83   | \$0.25  | \$0.18  | \$0.07 | \$7.00  | \$28.13     |
| 01            | CARPENTER MASTER CEA | Carpenter  | C    |    | 47  |     |     |     |     |     |     |     |     | \$0.00      | \$0.00     | \$0.00   | \$0.00   | \$0.00     | \$0.00   | \$0.00  | \$0.00  | \$0.00 | \$0.00  | \$0.00      |
|               |                      |            |      |    | 856 | 506 | 361 | 361 | 361 | 361 | 361 | 361 | 879 | \$99,878.00 | \$2,408.00 | \$949.00 | \$528.36 | \$1,787.16 | \$189.43 | \$14.20 | \$95.33 | \$0.00 | \$49.35 | \$95,023.40 |

**CASH\_SUMMARY**

| Fund | Due         | Paid     | Balance     |
|------|-------------|----------|-------------|
| HW   | \$99,020.30 | (\$0.00) | \$99,020.30 |
| PH   | \$2,408.00  | (\$0.00) | \$2,408.00  |
| VA   | \$949.00    | (\$0.00) | \$949.00    |
| VB   | \$528.36    | (\$0.00) | \$528.36    |
| CA   | \$1,787.16  | (\$0.00) | \$1,787.16  |
| AF   | \$189.43    | (\$0.00) | \$189.43    |
| WP   | \$14.20     | (\$0.00) | \$14.20     |
| IA   | \$95.33     | (\$0.00) | \$95.33     |
| IF   | \$0.00      | (\$0.00) | \$0.00      |
| WC   | \$49.35     | (\$0.00) | \$49.35     |
|      | \$95,023.40 | \$0.00   | \$95,023.40 |

Once you have verified the hours and due amounts are correct, you are ready to **Submit** your report to CFAO.

**Note: After you Submit your report to CFAO you will no longer be able to edit any details on your report.**

Highlight the desired row and select **Submit**

Home » Employer Management » Reports, Billing History & Payments

Billing History | Employment | Documents

Access Account:

**Work Reports**

Report Status:  Report Type:  Show Converted Reports:

View Pre-bill | Edit Work Report | **Submit**

| Inserted Date | Report Type     | Report Status | Date Released | User Released | Work Month | Trans Identifier | Trans# | Total Due   | Total Balance |
|---------------|-----------------|---------------|---------------|---------------|------------|------------------|--------|-------------|---------------|
| 05/20/2009    | Positive Report | Initial       | //            |               | 05/01/2009 |                  |        | \$43,018.75 | \$0.00        |

It will then be sent to CFAO and you will no longer have access to make changes. You are allowed to submit one report per work month. Notice upon submittal the Status will change to "Prebill".

## Reports From Self Service

If you would like to print or SAVE a report for your records go back in to Report Editor and click on **View Report**.

Employer: 000010-EMPLOYER 1; Access Account: 000010 EMPLOYER 1

---

**Filter**  
Access Account: 000010-EMPLOYER 1    Report Status: Prebill    Trans#: 1903624  
Data Received: 11/30/2009    Trans Type: 10 - Employer Report  
Member Count: [ ]    Row Count: [ ]  
Trans Identifier: 11/2009

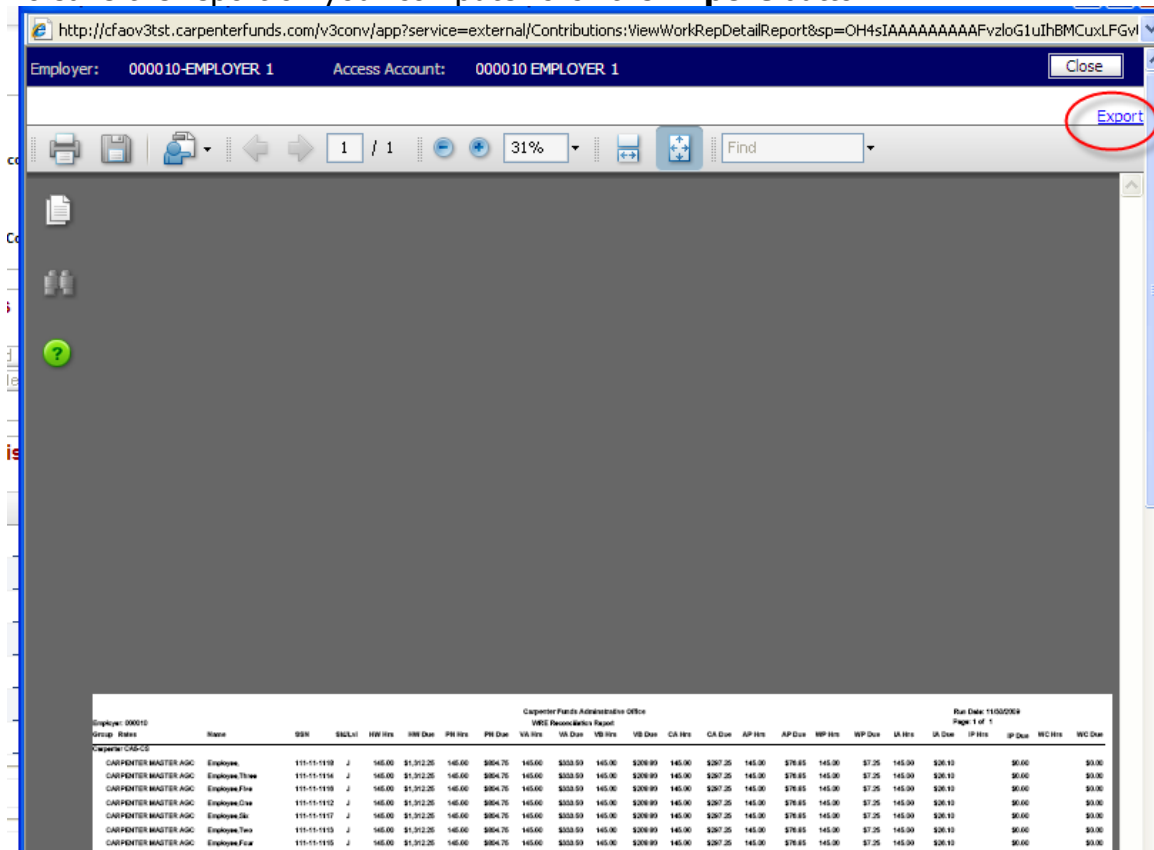
**Controls**  
[ ]    View Summary    20 Records  
**View Report**    Search    Clear Search    Sort By: Custom

**Billing History**

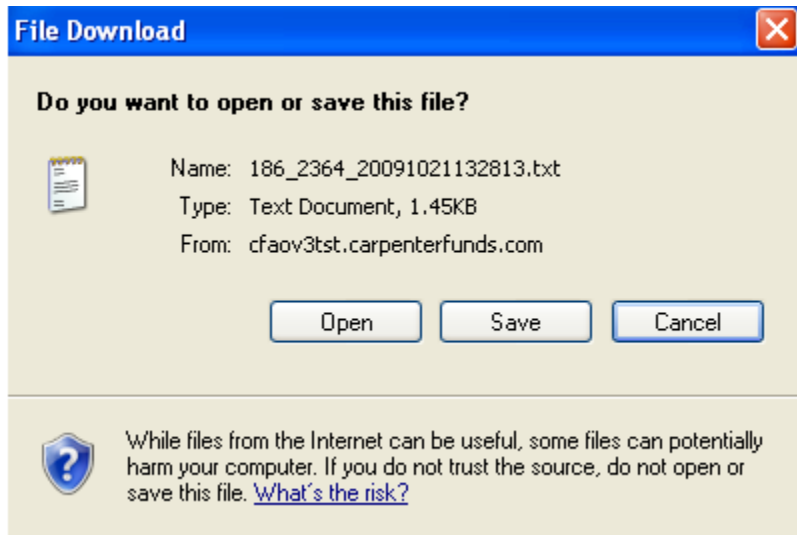
|                          | SSN         | Participant     | Rate Grouping        | Occ | Skl.           |
|--------------------------|-------------|-----------------|----------------------|-----|----------------|
| <input type="checkbox"/> | 111-11-1118 | EMPLOYEE,       | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1116 | EMPLOYEE, FIVE  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1115 | EMPLOYEE, FOUR  | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1112 | EMPLOYEE, ONE   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1117 | EMPLOYEE, SIX   | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1114 | EMPLOYEE, THREE | CARPENTER MASTER AGC | C   | J - Journeyman |
| <input type="checkbox"/> | 111-11-1113 | EMPLOYEE, TWO   | CARPENTER MASTER AGC | C   | J - Journeyman |

This will bring up your report so you can print it or save the report on to your computer.

To save the report on your computer click the **Export** button.



This will give you the option to Open, Save, or Cancel



Select **Save** and you can save your report in your files on your computer. To print this report click on the **Printer** in the left hand corner of the window.

Employer: 000010-EMPLOYER 1      Access Account: 000010 EMPLOYER 1      Close

1 / 1      31%      Find

Employee: 000010      Carpenter Funds Administrative Office      Run Date: 11/05/2019  
 Group Rates      VWS Recombination Report      Page: 1 of 1

| Employee             | Name           | SSN         | SECLvl | HW Hrs | HW Due     | PH Hrs | PH Due   | VA Hrs | VA Due   | VB Hrs | VB Due   | CA Hrs | CA Due   | AP Hrs | AP Due  | WP Hrs | WP Due | IA Hrs | IA Due  | IP Hrs | IP Due | MC Hrs | WC Due |        |
|----------------------|----------------|-------------|--------|--------|------------|--------|----------|--------|----------|--------|----------|--------|----------|--------|---------|--------|--------|--------|---------|--------|--------|--------|--------|--------|
| CARPENTER MASTER AGC | Employee       | 115-11-1119 | J      | 145.00 | \$1,312.25 | 145.00 | \$804.75 | 145.00 | \$333.53 | 145.00 | \$209.99 | 145.00 | \$267.25 | 145.00 | \$76.85 | 145.00 | \$7.25 | 145.00 | \$26.10 |        |        |        | \$0.00 | \$3.00 |
| CARPENTER MASTER AGC | Employee Three | 115-11-1114 | J      | 145.00 | \$1,312.25 | 145.00 | \$804.75 | 145.00 | \$333.53 | 145.00 | \$209.99 | 145.00 | \$267.25 | 145.00 | \$76.85 | 145.00 | \$7.25 | 145.00 | \$26.10 |        |        |        | \$0.00 | \$3.00 |
| CARPENTER MASTER AGC | Employee Five  | 115-11-1119 | J      | 145.00 | \$1,312.25 | 145.00 | \$804.75 | 145.00 | \$333.53 | 145.00 | \$209.99 | 145.00 | \$267.25 | 145.00 | \$76.85 | 145.00 | \$7.25 | 145.00 | \$26.10 |        |        |        | \$0.00 | \$3.00 |
| CARPENTER MASTER AGC | Employee One   | 115-11-1112 | J      | 145.00 | \$1,312.25 | 145.00 | \$804.75 | 145.00 | \$333.53 | 145.00 | \$209.99 | 145.00 | \$267.25 | 145.00 | \$76.85 | 145.00 | \$7.25 | 145.00 | \$26.10 |        |        |        | \$0.00 | \$3.00 |
| CARPENTER MASTER AGC | Employee Six   | 115-11-1117 | J      | 145.00 | \$1,312.25 | 145.00 | \$804.75 | 145.00 | \$333.53 | 145.00 | \$209.99 | 145.00 | \$267.25 | 145.00 | \$76.85 | 145.00 | \$7.25 | 145.00 | \$26.10 |        |        |        | \$0.00 | \$3.00 |

## Chapter 4 - Making Payments

Failure to remit your contribution within the time specified in the various Trust Agreements will require you to make an additional contribution to each Fund equal to 10% of the delinquent amount and in no event less than \$20.00 per Fund for Health & Welfare, Pension, Vacation and Holiday contributions, nor less than \$2.00 for Apprenticeship and Industry Advancement Fund purposes for each failure to pay in full within the time provided which shall become due and payable to the Fund in San Francisco upon the day immediately following the date of which the Employer became delinquent and shall be added to and become part of said amount due and unpaid, and the whole thereof shall bear interest at the rate specified in the applicable agreement until paid.

### Required documentation to complete the processing of your ERSS report:

1. A copy of the Summary Report (see page 32)
2. Complete the Deposit Slip (see page 38)
3. Mail items 1 and 2 with your check (see page 38)

#### 1. Print a copy of the Summary Page.

The screenshot displays the 'WORK\_HISTORY\_SUMMARY' report. At the top, there are filter fields for Access Account (BUELL EMPLOYER 1), Report Month (2012), Date Received (04/23/2012), and other details. Below the filters is a table with columns: Rate Grouping, Job, Classification, Occupation, and various contribution funds (HW, PH, VA, VS, CA, AP, WF, IA, IF, WC). The table contains multiple rows of data for different jobs and classifications. At the bottom left of the report area, there is a 'CASH SUMMARY' table.

| Fund | Due         | Paid     | Balance     |
|------|-------------|----------|-------------|
| HW   | \$88,030.30 | (\$0.00) | \$88,030.30 |
| PH   | \$2,908.30  | (\$0.00) | \$2,908.30  |
| VA   | \$949.80    | (\$0.00) | \$949.80    |
| VS   | \$928.39    | (\$0.00) | \$928.39    |
| CA   | \$1,367.30  | (\$0.00) | \$1,367.30  |
| AP   | \$109.43    | (\$0.00) | \$109.43    |
| WF   | \$14.20     | (\$0.00) | \$14.20     |
| IA   | \$95.33     | (\$0.00) | \$95.33     |
| IF   | \$0.00      | (\$0.00) | \$0.00      |
| WC   | \$49.35     | (\$0.00) | \$49.35     |
|      | \$93,023.40 | \$0.00   | \$93,023.40 |

**2. Print a deposit slip from carpenterfunds.com OR print a copy from Appendix B.** The information on the Summary Page circled above must be placed on the Deposit Slip.

CARPENTER FUNDS ADMINISTRATIVE OFFICE  
DEPOSIT SLIP for Employer Self Service REPORT OF CONTRIBUTIONS

By submitting this deposit slip, the below named employer certifies compliance with Employer Self Service Terms of Use:

SIGNATURE: \_\_\_\_\_ TITLE: Controller DATE: 6/10/2010

| Work Code         | TC  | HW          | PH         | VA       | VB       | CA         | AP       | WP      | IA      | IP     | WC      | TOTAL       | Payment # |
|-------------------|-----|-------------|------------|----------|----------|------------|----------|---------|---------|--------|---------|-------------|-----------|
| 05-10             | 32E | \$89,035.30 | \$2,888.30 | \$945.80 | \$528.30 | \$1,357.30 | \$188.43 | \$14.20 | \$95.33 | \$0.00 | \$49.35 | \$95,023.40 | 006255    |
| <b>Remittance</b> |     |             |            |          |          |            |          |         |         |        |         | \$95,023.40 |           |

EMPLOYER'S NAME AND ADDRESS  
Employer 1  
P. O. Box 187020  
Redding CA 95818

PHONE: (555) 323-4452  
ACCOUNT: 030425 ACCESS#: 030425

REMIT PAYMENT AND THIS DEPOSIT SLIP TO:  
Carpenter Funds of Northern California  
Dept 01611  
P.O.Box 39000  
San Francisco, CA 94139-1611

3. Mail the Deposit slip and Summary Page with your check to:

Carpenter Funds of Northern California  
Dept 01611  
PO Box 39000  
San Francisco CA 94139-1611

**If all required documents and payment are not remitted to the designated bank P.O. Box, there will be a delay in processing. Also, any remittance that is not in the exact format and layout as the Deposit Slip provided will be subject to rejection by the bank and result in delayed processing.**

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## Appendix A: OSL CODES

| Occupation Code | Skill Level Code | Occupation Skill Level Description | X = Fringes applicable to Occupation Skill Level |      |      |     |     |     |     |     |     |     |
|-----------------|------------------|------------------------------------|--|------|------|-----|-----|-----|-----|-----|-----|-----|
|                 |                  |                                    | H&W  | PE N | AN N | APP | V A | V B | I A | W P | I P | W C |
| A               | A1               | Assembler Apprentice 1             |  |      |      |     |     | X   | X   | X   |     | X   |
| A               | A2               | Assembler Apprentice 2             | X  |      |      |     |     | X   | X   | X   |     | X   |
| A               | A3               | Assembler Apprentice 3             | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | A4               | Assembler Apprentice 4             | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | A5               | Assembler Apprentice 5             | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | A6               | Assembler Apprentice 6             | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | A7               | Assembler Apprentice 7             | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | A8               | Assembler Apprentice 8             | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | J                | Assembler Journeyman               | X  |      | X    |     |     | X   | X   | X   |     | X   |
| A               | S                | Assembler Superintendent           | X  | X    |      |     |     |     |     |     |     | X   |
| A               | S1               | Assembler Superintendent 1         | X  | X    | X    |     |     |     |     |     |     | X   |
| B               | A1               | Bridgebuilder Apprentice 1         | X  | X    |      | X   |     | X   | X   | X   |     | X   |
| B               | A2               | Bridgebuilder Apprentice 2         | X  | X    |      | X   | X   | X   | X   | X   |     | X   |
| B               | A3               | Bridgebuilder Apprentice 3         | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | A4               | Bridgebuilder Apprentice 4         | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | A5               | Bridgebuilder Apprentice 5         | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | A6               | Bridgebuilder Apprentice 6         | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | A7               | Bridgebuilder Apprentice 7         | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | A8               | Bridgebuilder Apprentice 8         | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | A9               | Bridgebuilder Apprentice           | X  | X    | X    | X   | X   | X   | X   |     |     | X   |
| B               | J                | Bridgebuilder Journeyman           | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| B               | O                | Bridgebuilder Owner                | X  | X    |      |     |     |     |     |     |     |     |
| B               | O1               | Bridgebuilder Owner                | X  | X    | X    |     |     |     |     |     |     |     |
| B               | Q                | Bridgebuilder Owner                | X  | X    | X    | X   | X   | X   | X   |     |     | X   |
| B               | S                | Bridgebuilder Superintendent       | X  | X    |      |     |     |     |     |     |     | X   |
| B               | S1               | Bridgebuilder Superintendent 1     | X  | X    | X    |     |     |     |     |     |     | X   |
| B               | S5               | Bridgebuilder Superintendent       | X  | X    | X    |     | X   | X   |     |     |     |     |
| C               | A1               | Carpenter Apprentice 1             | X  | X    |      | X   |     | X   | X   | X   |     | X   |
| C               | A2               | Carpenter Apprentice 2             | X  | X    |      | X   | X   | X   | X   | X   |     | X   |
| C               | A3               | Carpenter Apprentice 3             | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| C               | A4               | Carpenter Apprentice 4             | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |
| C               | A5               | Carpenter Apprentice 5             | X  | X    | X    | X   | X   | X   | X   | X   |     | X   |

|   |    |                                   |   |   |   |   |   |   |   |   |   |   |
|---|----|-----------------------------------|---|---|---|---|---|---|---|---|---|---|
| C | A6 | Carpenter Apprentice 6            | X | X | X | X | X | X | X | X |   | X |
| C | A7 | Carpenter Apprentice 7            | X | X | X | X | X | X | X | X |   | X |
| C | A8 | Carpenter Apprentice 8            | X | X | X | X | X | X | X | X |   | X |
| C | AP | Carpenter Pre-Apprentice 1        |   |   |   | X |   | X | X | X |   | X |
| C | AQ | Carpenter Pre-Apprentice 2        | X |   |   | X |   | X | X | X |   | X |
| C | J  | Carpenter Journeyman              | X | X | X | X | X | X | X | X |   | X |
| C | J5 | Journeyman                        | X | X | X |   | X | X |   |   |   |   |
| C | K  | Key Carpenter                     | X | X | X | X | X | X | X | X | X | X |
| C | O  | Carpenter Owner                   | X | X |   |   |   |   |   |   |   | X |
| C | O1 | Carpenter Owner                   | X | X | X |   |   |   |   |   |   | X |
| C | Q  | Carpenter Owner                   | X | X | X | X | X | X | X | X |   | X |
| C | S  | Carpenter Superintendent          | X | X |   |   |   |   |   |   |   | X |
| C | S1 | Carpenter Superintendent 1        | X | X | X |   |   |   |   |   |   | X |
| C | S5 | Carpenter Superintendent          | X | X | X |   | X | X |   |   |   |   |
| D | A1 | Drywall Apprentice 1              | X | X |   | X |   | X | X | X |   | X |
| D | A2 | Drywall Apprentice 2              | X | X |   | X | X | X | X | X |   | X |
| D | A3 | Drywall Apprentice 3              | X | X | X | X | X | X | X | X |   | X |
| D | A4 | Drywall Apprentice 4              | X | X | X | X | X | X | X | X |   | X |
| D | A5 | Drywall Apprentice 5              | X | X | X | X | X | X | X | X |   | X |
| D | A6 | Drywall Apprentice 6              | X | X | X | X | X | X | X | X |   | X |
| D | A7 | Drywall Apprentice 7              | X | X | X | X | X | X | X | X |   | X |
| D | A8 | Drywall Apprentice 8              | X | X | X | X | X | X | X | X |   | X |
| D | AA | Drywall Apprentice 1 (former DR1) | X | X |   | X |   | X | X | X |   | X |
| D | AB | Drywall Apprentice 2 (former DR1) | X | X |   | X | X | X | X | X |   | X |
| D | AC | Drywall Apprentice 3 (former DR1) | X | X | X | X | X | X | X | X |   | X |
| D | AD | Drywall Apprentice 4 (former DR1) | X | X | X | X | X | X | X | X |   | X |
| D | AE | Drywall Apprentice 1 (former DR2) | X | X |   | X | X | X | X | X |   | X |
| D | AF | Drywall Apprentice 2 (former DR2) | X | X |   | X | X | X | X | X |   | X |
| D | AG | Drywall Apprentice 3 (former DR2) | X | X | X | X | X | X | X | X |   | X |
| D | AH | Drywall Apprentice 4 (former DR2) | X | X | X | X | X | X | X | X |   | X |
| D | AI | Drywall Apprentice 1 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AJ | Drywall Apprentice 2 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AK | Drywall Apprentice 3 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AL | Drywall Apprentice 4 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AM | Drywall Apprentice 1 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AN | Drywall Apprentice 2 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AP | Drywall Apprentice 3 (former DR3) | X | X | X | X | X | X | X | X |   | X |
| D | AQ | Drywall Apprentice 4 (former DR3) | X | X | X | X | X | X | X | X |   | X |

|   |    |                                     |   |   |   |   |   |   |   |   |   |   |
|---|----|-------------------------------------|---|---|---|---|---|---|---|---|---|---|
| D | AR | Drywall Apprentice 1 (former DR3)   | X | X | X | X | X | X | X | X |   | X |
| D | AT | Drywall Apprentice 2 (former DR3)   | X | X | X | X | X | X | X | X |   | X |
| D | AU | Drywall Apprentice 3 (former DR3)   | X | X | X | X | X | X | X | X |   | X |
| D | AV | Drywall Apprentice 4 (former DR3)   | X | X | X | X | X | X | X | X |   | X |
| D | J  | Drywall Journeyman                  | X | X | X | X | X | X | X | X |   | X |
| D | J5 | Journeyman                          | X | X | X |   | X | X |   |   |   |   |
| D | O  | Drywall Owner                       | X | X |   |   |   |   |   |   |   |   |
| D | O1 | Drywall Owner                       | X | X | X |   |   |   |   |   |   |   |
| D | Q  | Drywall Owner                       | X | X | X | X | X | X | X | X |   | X |
| D | R1 | Drywall Stocker/Scrapper 1          | X | X |   |   |   |   |   |   |   | X |
| D | R2 | Drywall Stocker/Scrapper 2          | X | X |   |   | X | X |   |   |   | X |
| D | R3 | Drywall Stocker/Scrapper 3          | X | X | X |   | X | X |   |   |   | X |
| D | S  | Drywall Superintendent              | X | X |   |   |   |   |   |   |   | X |
| D | S1 | Drywall Superintendent 1            | X | X | X |   |   |   |   |   |   | X |
| F | J  | Fireplace Installer Journeyman      | X |   | X |   | X | X | X |   | X |   |
| F | S  | Key Carpenter Superintendent        | X | X |   |   |   |   |   |   |   | X |
| F | S1 | Key Carpenter Superintendent 1      | X | X | X |   |   |   |   |   |   | X |
| F | T1 | Fireplace Installer Trainee 1       | X |   |   |   |   | X |   |   |   |   |
| F | T2 | Fireplace Installer Trainee 2       | X |   |   |   |   | X |   |   |   |   |
| F | T3 | Fireplace Installer Trainee 3       | X |   |   |   |   | X |   |   |   |   |
| F | T4 | Fireplace Installer Trainee 4       | X |   |   |   |   | X |   |   |   |   |
| F | T5 | Fireplace Installer Trainee 5       | X |   |   |   |   | X |   |   |   | X |
| F | T6 | Fireplace Installer Trainee 6       | X |   |   |   |   | X |   |   |   | X |
| G | J  | Garage Door Installer Journeyman    | X |   | X |   | X | X | X |   | X |   |
| G | S  | Key Drywall Superintendent          | X | X |   |   |   |   |   |   |   | X |
| G | T1 | Garage Door Installer Trainee 1     | X |   |   |   |   | X |   |   |   |   |
| G | T2 | Garage Door Installer Trainee 2     | X |   |   |   |   | X |   |   |   |   |
| G | T3 | Garage Door Installer Trainee 3     | X |   |   |   |   | X |   |   |   | X |
| G | T4 | Garage Door Installer Trainee 4     | X |   |   |   |   | X |   |   |   | X |
| I | J  | Master/Lead Installer               | X |   | X |   | X | X | X |   | X | X |
| I | O  | Modular Installer Owner             | X |   |   |   | X | X |   |   | X |   |
| I | O1 | Modular Installer Owner             | X |   | X |   | X | X |   |   | X |   |
| I | Q  | Modular Installer Owner             | X |   | X |   | X | X | X |   | X | X |
| I | S  | Modular Installer Superintendent    | X |   |   |   |   |   |   |   | X | X |
| I | S1 | Modular Installer Superintendent 1  | X |   | X |   | X | X |   |   | X | X |
| I | T1 | Installer II 0-240 hrs              | X |   |   |   |   | X |   |   |   | X |
| I | T2 | Installer II 241-480 hrs            | X |   |   |   |   | X | X |   |   | X |
| I | T3 | Installer II 480+ hrs / Installer I | X |   | X |   | X | X | X |   | X | X |

|   |    |                                      |   |   |   |   |   |   |   |   |  |     |
|---|----|--------------------------------------|---|---|---|---|---|---|---|---|--|-----|
| K | 1  | Production Worker - Carpenter Type 1 |   |   |   |   |   |   |   |   |  | X   |
| K | 2  | Production Worker - Carpenter Type 2 |   |   | X |   |   |   |   |   |  | X X |
| K | 4  | Production Worker - Carpenter Type 4 |   |   |   |   |   |   |   |   |  | X X |
| M | 1  | Non-Production and Part Time Worker  | X |   |   | X |   | X | X |   |  |     |
| M | A1 | Mill Cabinet Apprentice 1            | X | X |   | X | X | X | X |   |  | X   |
| M | A2 | Mill Cabinet Apprentice 2            | X | X |   | X | X | X | X |   |  | X   |
| M | A3 | Mill Cabinet Apprentice 3            | X | X |   | X | X | X | X |   |  | X   |
| M | A4 | Mill Cabinet Apprentice 4            | X | X |   | X | X | X | X |   |  | X   |
| M | A5 | Mill Cabinet Apprentice 5            | X | X | X | X | X | X | X |   |  | X   |
| M | A6 | Mill Cabinet Apprentice 6            | X | X | X | X | X | X | X |   |  | X   |
| M | A7 | Mill Cabinet Apprentice 7            | X | X | X | X | X | X | X |   |  | X   |
| M | A8 | Mill Cabinet Apprentice 8            | X | X | X | X | X | X | X |   |  | X   |
| M | J  | Mill Cabinet Journeyman              | X | X | X | X | X | X | X |   |  | X   |
| M | J4 | Mill Cabinet Production Worker       | X | X | X | X | X | X | X |   |  | X   |
| M | O  | Mill Cabinet Owner                   | X | X |   |   |   |   |   |   |  |     |
| M | O1 | Mill Cabinet Owner                   | X | X | X |   |   |   |   |   |  |     |
| M | Q  | Mill Cabinet Owner                   | X | X | X | X | X | X | X | X |  | X   |
| M | S  | Mill Cabinet Superintendent          | X | X |   |   |   |   |   |   |  | X   |
| M | S1 | Mill Cabinet Superintendent 1        | X | X | X |   |   |   |   |   |  | X   |
| N | Z  | Non-Contracted Flat Rate             | X |   |   |   |   |   |   |   |  |     |
| O | H  | Overhead Door Installer Helper 1     | X |   |   |   |   |   |   |   |  | X   |
| O | I  | Overhead Door Installer              | X |   | X |   |   | X |   |   |  | X   |
| O | J  | Overhead Door Installer Journeyman   | X | X | X |   |   | X | X |   |  | X   |
| O | W  | Overhead Door Installer Helper 2     | X |   |   |   |   | X |   |   |  | X   |
| P | A1 | Piledriver Apprentice 1              | X | X |   | X |   | X | X |   |  | X   |
| P | A2 | Piledriver Apprentice 2              | X | X |   | X | X | X | X |   |  | X   |
| P | A3 | Piledriver Apprentice 3              | X | X | X | X | X | X | X |   |  | X   |
| P | A4 | Piledriver Apprentice 4              | X | X | X | X | X | X | X |   |  | X   |
| P | A5 | Piledriver Apprentice 5              | X | X | X | X | X | X | X |   |  | X   |
| P | A6 | Piledriver Apprentice 6              | X | X | X | X | X | X | X |   |  | X   |
| P | A7 | Piledriver Apprentice 7              | X | X | X | X | X | X | X |   |  | X   |
| P | A8 | Piledriver Apprentice 8              | X | X | X | X | X | X | X |   |  | X   |
| P | J  | Piledriver Journeyman                | X | X | X | X | X | X | X |   |  | X   |
| P | J5 | Journeyman                           | X | X | X |   |   | X | X |   |  |     |
| P | JC | Piledriver Journeyman                | X | X | X | X | X | X | X |   |  | X   |
| P | O  | Piledriver Owner                     | X | X |   |   |   |   |   |   |  |     |
| P | O1 | Piledriver Owner                     | X | X | X |   |   |   |   |   |  |     |

|   |    |                                    |   |   |   |   |   |   |   |   |   |   |
|---|----|------------------------------------|---|---|---|---|---|---|---|---|---|---|
| P | Q  | Piledriver Owner                   | X | X | X | X | X | X | X | X |   | X |
| P | S  | Piledriver Superintendent          | X | X |   |   |   |   |   |   |   | X |
| P | S1 | Piledriver Superintendent 1        | X | X | X |   |   |   |   |   |   | X |
| R | J1 | Residential Carpenter Journeyman   | X | X | X | X | X | X | X | X |   | X |
| R | J2 | Residential Drywall Journeyman     | X | X | X | X | X | X | X | X |   | X |
| R | JN | Residential Insulator Journeyman   | X | X | X | X | X | X | X | X |   | X |
| R | N1 | Residential Insulator Carp 1       | X |   | X | X | X | X | X | X | X | X |
| R | N2 | Residential Insulator Carp 2       | X |   | X | X | X | X | X | X | X | X |
| R | N3 | Residential Insulator Spec 1       | X |   | X | X | X | X | X | X | X | X |
| R | N4 | Residential Insulator Spec 2       | X |   | X | X | X | X | X | X | X | X |
| R | S1 | Residential Carpenter Specialist 2 | X |   | X | X | X | X | X | X | X | X |
| R | S2 | Residential Drywall Specialist 2   | X |   | X | X | X | X | X | X | X | X |
| R | T1 | Residential Carpenter Trainee 1    | X |   |   |   |   | X |   |   |   | X |
| R | T2 | Residential Carpenter Trainee 2    | X |   |   |   |   | X |   |   | X | X |
| R | U1 | Residential Carpenter Class 1      | X |   | X | X | X | X | X | X | X | X |
| R | U2 | Residential Drywall Level 1        | X |   | X | X | X | X | X | X | X | X |
| R | U4 | Residential Carpenter Class 2      | X |   | X | X | X | X | X | X | X | X |
| R | U5 | Residential Drywall Level 2        | X |   | X | X | X | X | X | X | X | X |
| R | U7 | Residential Carpenter Specialist 1 | X |   | X | X | X | X | X | X | X | X |
| R | U8 | Residential Drywall Specialist 1   | X |   | X | X | X | X | X | X | X | X |
| V | J  | Key Millwright Journeyman          | X | X | X | X | X | X | X | X |   | X |
| V | S  | Key Millwright Superintendent      | X | X |   |   |   |   |   |   |   | X |
| W | A1 | Millwright Apprentice 1            | X | X |   | X |   | X | X | X |   | X |
| W | A2 | Millwright Apprentice 2            | X | X |   | X | X | X | X | X |   | X |
| W | A3 | Millwright Apprentice 3            | X | X | X | X | X | X | X | X |   | X |
| W | A4 | Millwright Apprentice 4            | X | X | X | X | X | X | X | X |   | X |
| W | A5 | Millwright Apprentice 5            | X | X | X | X | X | X | X | X |   | X |
| W | A6 | Millwright Apprentice 6            | X | X | X | X | X | X | X | X |   | X |
| W | A7 | Millwright Apprentice 7            | X | X | X | X | X | X | X | X |   | X |
| W | A8 | Millwright Apprentice 8            | X | X | X | X | X | X | X | X |   | X |
| W | J  | Millwright Journeyman              | X | X | X | X | X | X | X | X |   | X |
| W | J5 | Journeyman                         | X | X | X |   | X | X |   |   |   |   |
| W | O  | Millwright Owner                   | X | X |   |   |   |   |   |   |   |   |
| W | O1 | Millwright Owner                   | X | X | X |   |   |   |   |   |   |   |
| W | Q  | Millwright Owner                   | X | X | X | X | X | X | X | X |   | X |
| W | S  | Millwright Superintendent          | X | X |   |   |   |   |   |   |   | X |
| W | S1 | Millwright Superintendent 1        | X | X | X |   |   |   |   |   |   | X |
| W | S5 | Millwright Superintendent          | X | X | X |   | X | X |   |   |   |   |

|   |    |                              |   |  |   |   |   |   |   |  |  |   |
|---|----|------------------------------|---|--|---|---|---|---|---|--|--|---|
| X | 1  | Mill Cab Prod Worker         | X |  | X |   | X | X | X |  |  | X |
| X | N  | Mill Cab Non-Prod Worker     |   |  |   | X | X | X |   |  |  | X |
| Y | J  | Drapery Installer Journeyman | X |  | X |   | X | X |   |  |  | X |
| Y | T1 | Drapery Installer Trainee 1  | X |  |   |   |   | X |   |  |  | X |
| Y | T2 | Drapery Installer Trainee 2  | X |  |   |   | X | X |   |  |  | X |
| Y | T3 | Drapery Installer Trainee 3  | X |  | X |   | X | X |   |  |  | X |
| Y | T4 | Drapery Installer Trainee 4  | X |  | X |   | X | X |   |  |  | X |



## Appendix C: Terms of Service

### Terms Of Service

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#### **Use of this Website requires that you read and accept the following Terms and Conditions**

##### **Use of Site**

Access to this Website is restricted to authorized users. An authorized user is any individual designated by the employer as an authorized representative of the employer and who has been assigned a user name and temporary password. The authorized user agrees to reset temporary password upon initial login and never to share the password with any other party. Each employer may authorize more than one Self Service user by completing the form titled "REQUEST NEW USER," and each new authorized user will be assigned a unique user name and temporary password. If an authorized user's employment is terminated or if the authorized user's role no longer requires access, the employer agrees to promptly notify the Carpenter Funds Administrative Office in writing so that the user may be deactivated. Complete the form titled "DEACTIVATE USER," and fax to (510) 562-1702.

The Self Service Website is to be used solely for the purpose of submitting the Employer Report of Contributions and remitting payment to the Carpenter Funds Administrative Office. Some of the information provided on this Website is confidential, including but not limited to Social Security numbers. The copying, distribution, or emailing of the information contained in this Website is prohibited.

##### **Terms of Service**

By using the Self Service Website and submitting the Employer Report of Contributions online, the below-named employer certifies the following:

- 1.** The information submitted online is correct.
- 2.** That all compensable hours paid to carpenters, piledrivers, and other employees subject to being reported to the Carpenters Funds Administrative Office employed by such employer during the period covered are reported herein.
- 3.** That such employer is bound by and subject to all of the terms and conditions of the Carpenters 46 Northern California Counties Master Agreement or other appropriate Collective Bargaining Agreement, and all payments reported herein are made under and pursuant to such Agreement as required by Section 302(c)(5)(B) of the Labor-Management Relations Act, as amended (LMRA) and the Employee Retirement Income Security Act, as amended (ERISA).
- 4.** That all persons reported are employees of such employer within the meaning of the LMRA and ERISA.
- 5.** That the depository bank is designated by the employer as his or its agent to receive written dues authorizations from such employees pursuant to Section

302(c)(4) of the LMRA and any revocations of such authorizations.

**6.** That said bank is directed by the employer (a) to deposit the reported herein under Vacation and Holiday – Column B – Work Fee in a special account, (b) to transfer monthly from such account the monies paid with respect to the work of each employee who has on file with the bank unrevoked dues authorization in a form complying with law to the account of the Carpenters 46 Northern California Counties Conference Board a work fee and (c) to transfer the remaining monies to the Carpenters Vacation and Holiday Trust Fund for Northern California for credit to the Vacation and Holiday accounts for the other employees.

**7.** That the depository bank is authorized by the employer to transfer the remaining monies remitted herewith to the appropriate Funds in accordance with instructions issued by the appropriate Boards of Trustees.

**8.** That this report is being submitted by the employer or duly authorized representative of the employer (authorized user).

### **General Disclaimer and Waiver of Damages**

The Self Service Website is intended to provide accurate information. Complete details, including information such as fringe benefit rates and employee classifications, are contained in the Collective Bargaining Agreement(s) to which the employer is bound. The Carpenter Funds Administrative Office has made every effort to provide an error-free environment; however, if there is any conflict between the information provided in this Website and the Collective Bargaining Agreement to which the employer is bound, the Collective Bargaining Agreement will prevail.

By using this website, you release the Carpenter Funds Administrative Office from all liability resulting from such use, and you agree that in no event shall the Carpenter Funds Administrative Office, its affiliated trust funds, suppliers, or any third parties mentioned at this website be liable for any damages whatsoever (including, without limitation, incidental and consequential damage, lost profits, or damages resulting from lost data) resulting from the use or inability to use this website and the material contained herein, regardless of whether such damages resulted from a claim based on a warranty, contract, tort or any other legal theory and whether or not the Carpenter Funds Administrative Office is advised of the possibility of such damages.

By accepting you certify that you have read the Terms and Conditions and agree to be bound by such Terms and Conditions for use of this website.

Accept

Decline