PSWA

Employers Guide to Online Reporting

Employee Contributions Made Easy



Getting Started

Using internet Explorer or Firefox, you can log into WebERF to report contributions.

Enter the WebERF URL https://sdg.weberf.com in your web browser's address bar. This will open the Terms of Use. To continue you must click on I Agree tab.

SAN DIEGO LOCAL 1399 GLAZIERS AND FLOOR

Terms of Use

Efforts have been made to ensure that the information on this website is accurate and complete. However, it is possible that there may be errors, omissions or other problems may have occurred. Neither the Trust Fund(s), nor the Plan Administrator and Plan Sponsors of the Trust Fund(s) take any responsibility for these and expressly disclaim responsibility for these.

This website contains a summary of the rights and benefits that pertain to you under each Plan. In the event of any difference between this website and the actual provisions of the Plan(s), the Plan(s) will govern. The Plan(s) are available from the Plan Administrator.

Please note that benefit information is subject to verification and updating. The Board of Trustees of the Fund(s) retains sole authority to interpret or amend the terms of the Plan(s) or benefits. To avoid confusion, note the date through which the information provided is current. If you believe the information is inaccurate, notify the Plan Administrator as soon as possible. Obtain confirmation of the information from the Plan Administrator before making decisions affecting your benefits.

This website is not intended to provide you with financial counseling or tax advice. You should consult your own advisers for guidance on when to retire and when making other important financial decisions.

If you have any questions or concerns about any of the data and/or information at this website or wish to obtain a copy of the Plan document(s), please contact the Plan Administrator.

Pacific Southwest Administrators (PSWA)
4399 Santa Anita Avenue, Suite 200 * El Monte, CA 91731
Office Hours: Monday - Friday, 8:00 a.m. to 5:00 p.m. (PST)
Phone: (626) 279-3072 * Toll Free: 1(800) 719-8963

l Agree

^{*}Google has dropped support many 3rd party plug-ins. The pdf files created by WebERF are not supported on Google Chrome.

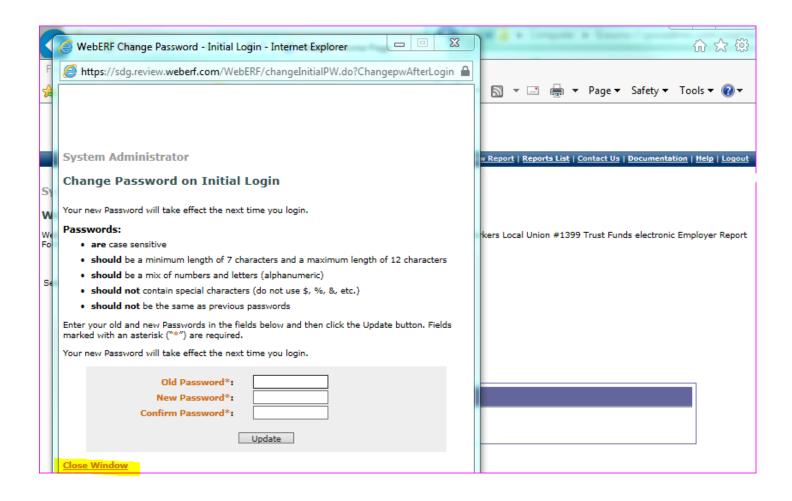
Site Login

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On the **SITE LOGIN** page, enter your **UserID** and **Password** in their respective fields. Now click the **SUBMIT** option to continue to the **WEBERF HOME** page.

A **UserID** and **Password** will be provided to you for your initial login. You can change both your **UserID** and **Password** to make them easier to remember.

Changing Your User ID and Password



When you login to the **WEBERF HOME** page for the first time, you will be prompted to change your password.*

It is recommended to change your password right away. If you choose to not change your password at this time, you will be prompted to change it every time you log into the **WEBERF HOME** page until it is changed.

*If your web browser has a pop-up blocker enabled, you will not see the initial **CHANGE PASSWORD** pop-up. You can still change your password by allowing this website to open pop-ups on your web browser, or by clicking the **Change User ID/Password** hyperlink on the right hand side of the **WEBERF HOME** page.

WebERF Home Page



On the WEBERF HOME page, you have many tools and options at your finger tips

Create New Report: Click on this link to create a new report.

<u>View List of Pended and Finalized Reports:</u> This link lets you view all past and current unfinished and finalized reports.

<u>Employer Administrative Reports:</u> This link allows you to view all contribution reports you have completed online.

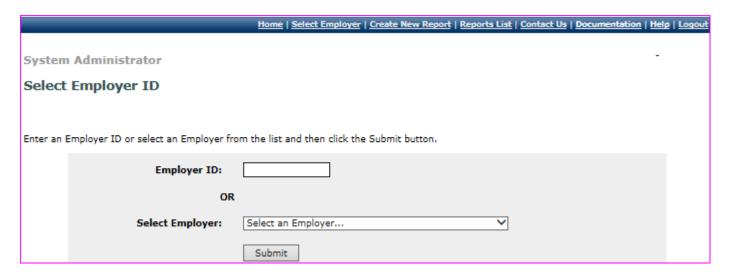
Add/Edit Projects: This link allows you to view all projects that are setup on your account.

<u>Announcements:</u> At the bottom of the page, there are global and personal announcements that are general or specific for your account.

Creating a New Report

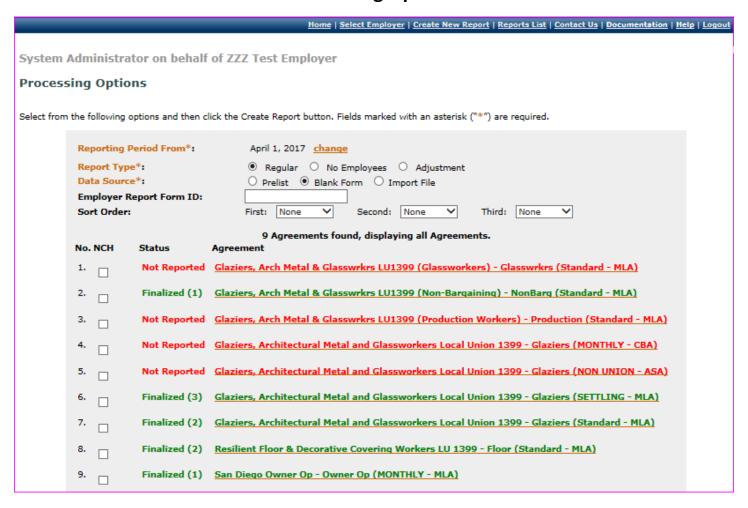


To create a new report, click on the <u>Create New Report</u> hyperlink. This will take you to the **PROCESSING OPTIONS** page.



Enter your Employer ID number

Processing Options



In the **PROCESSING OPTIONS** page, you will need to choose the Reporting Period you will be reporting by clicking on **change**.

From this page you can have various options to help you modify and simplify your report.

Agreement: Allows you to select the agreement for the type of work you will be reporting (only applicable if you have various types of agreements: I.e., Exhibit Builders, Sign Installation, Tradeshow Installers, etc.)

Report Type: You will need to select a report type, **Regular** for report with hours or **No Employee*** for a report with no employees worked for that month.

Data Source: This option allows you to select how you want to start your report.

Prelist: Uses information from the last report you have submitted

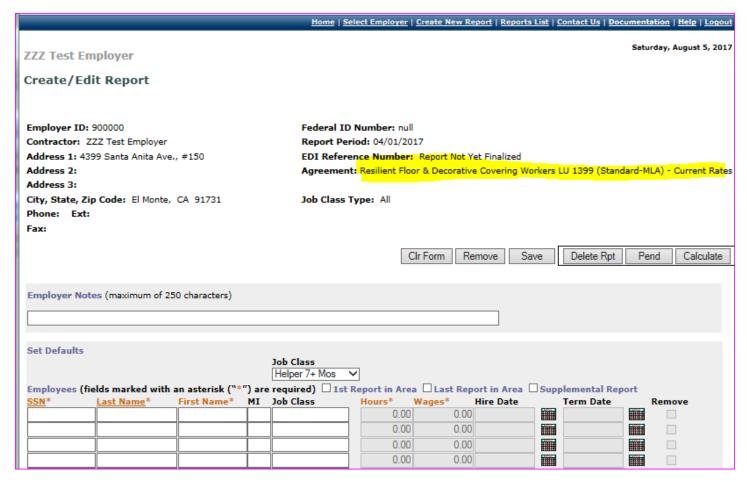
Blank Form: Starts a blank form with no data.

Import File: Allows you to import data from a reporting program you may already use or from Excel.

Employer Report Form ID: This allows you to add your own custom name for easily identifying this report.

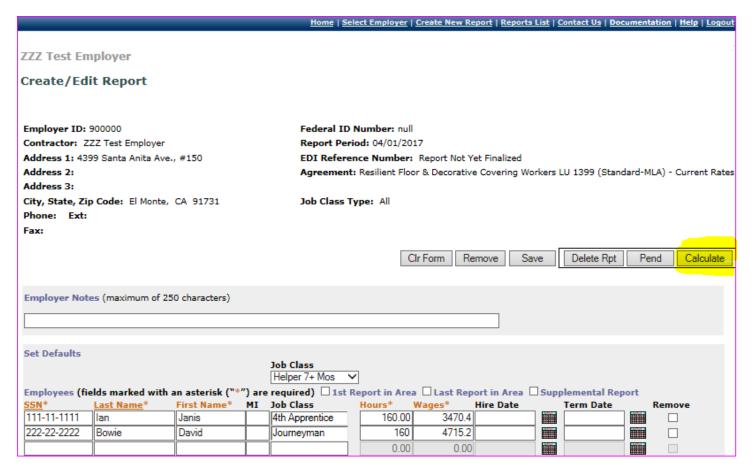
Agreements that you are required to report will be listed under **Agreement**. This also gives you information if you have **Not Reported** or have **finalized** any reports. Select and click on the **Agreement** option you will be reporting.

General Reporting Information



In the CREATE/REPORT page, you will have to enter all the required information that is marked with an asterisk (*).

Report Editing Options



The options on this page can help you edit your report in many ways.

Cir Form: allows you to completely clear all the information you have entered without deleting the report.

Remove: allows you to remove a single line of information on the report form after clicking on the small **Remove** box next to the **Term Date** field

Save: Allows you to save the current information you have entered on the report form.

Once you are done adding/editing this information, there are three ways to handle the report:

Delete Rpt: Deletes the entire form for the work period you selected.

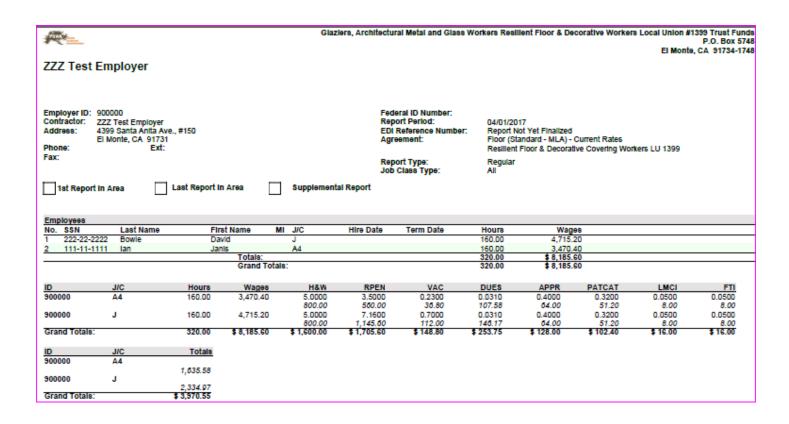
Pend: Pends your report for future editing/adding of information you have added.

Calculate: Calculates the contribution amounts you will need to submit to the Trust Fund for this report. Clicking this option also sends you the final steps of your online report.

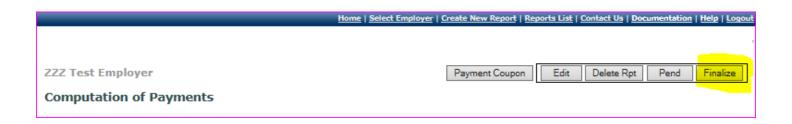
Computation of Payment



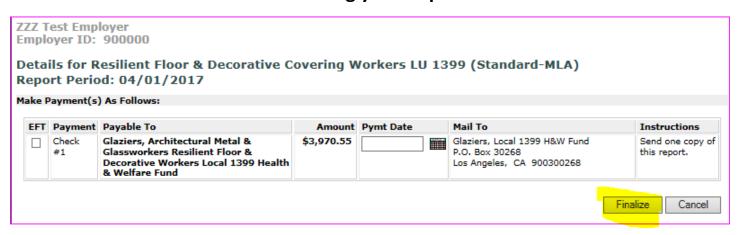
A message will pop up asking to open or save. Select Open.



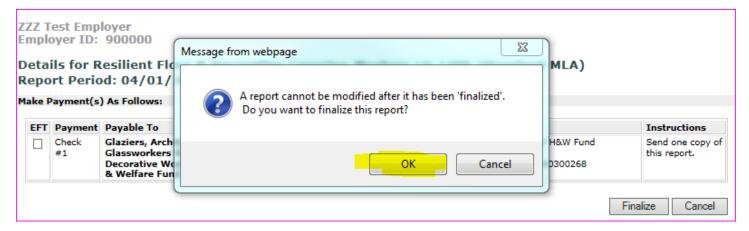
The **COMPUTATION OF PAYMENT** page provides a complete and thorough breakdown of the contributions you will need to submit based on a number of categories (i.e., contributions by job class, trust fund, etc.). This page also shows the total contribution amount you will need to submit. Close the window



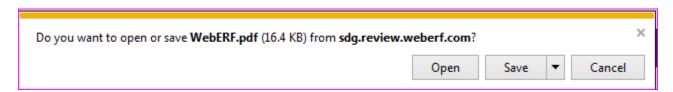
Finalizing your Report



To finalize your report, you will need to click the **FINALIZE** option. Window will pop-up giving details to of Payment. Click on Finalize option to complete transaction.

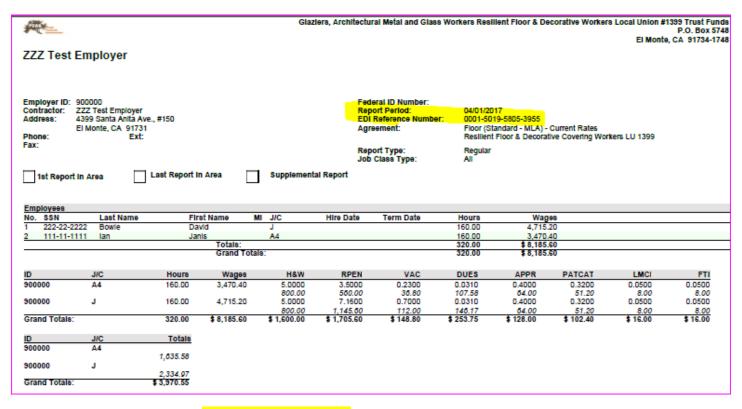


Message will pop up advising a report cannot be modified after it has been 'finalized'. Click on OK to complete Report Form.



Message will pop up asking to open or save. Select open.

Computation of Payments



Your report will now have an EDI Reference Number indicating transaction is now complete. Computation of Payments will give the Details of the Employees. Close the window



Computation of Payment. Select Payment Coupon.

Payment Details



Payment Detail – message will pop up asking to open or save. Select open. Payment coupon will appear.

Payment Coupon

		Glaziers, Architect	ural Metal and Glass	Workers Resi	llent Floor & De	ecorative Worker	8 Local Union #1	399 Trust Funds P.O. Box 5748
Payment Coupon for ZZZ Test E	Employer						El Monte	, CA 91734-1748
Employer ID: 900000 Contractor: ZZZ Test Employer Address: 4399 Santa Anita Ave., #150 El Monte, CA 91731 Phone: Ext: Fax:		Re ED	deral ID Number: port Period: I Reference Number reement:	Floor (St	19-5805-3955 tandard - MLA) -	· Current Rates itive Covering Wor	kers LU 1399	
Contractor License:			port Type: b Class Type:	Regular All				
Business Type:		Da	te Report Finalized:	08/05/20	117			
ID J/C Hours	Wages H&V	N RPEN	VAC	DUES	APPR	PATCAT	LMCI	FTI
900000 A4 160.00	3,470.40 5.000		0.2300	0.0310	0.4000	0.3200	0.0500	0.0500
900000 J 160.00	4.715.20 5.000		35.80 0.7000	107.58 0.0310	64.00 0.4000	51.20 0.3200	8.00 0.0500	8.00 0.0500
300000	800.0		112.00	145.17	64.00	51.20	8.00	8.00
Grand Totals: 320.00	\$ 8,185.60 \$ 1,600.0	0 \$1,705.60	\$ 148.80	\$ 253.75	\$ 128.00	\$ 102.40	\$ 16.00	\$ 16.00
ID J/C Totals 900000 A4								
1,635.58 900000 J								
2,334.97 Grand Totals: \$ 3,970.55								
REPORT DUE ON THE 20th OF THE MONTH								
Be sure to include the EDI Reference Number 0001-5019-5805-3955 in the Memo portion of check(s).								
Make Payment(s) As Follows: Payment Date Amount Due	Payable To	Instr	uctions		Mall To			
Check #1 \$ 3,970.55	\$ 3,970.55 Giazlers, Architectural Metal & Send one copy of this report. Giazlers, Local 1399 H&W Fund Giassworkers Resilient Floor & Decorative P.O. Box 30268 Workers Local 1399 Health & Welfare Los Angeles, CA 900300268 Fund							
Signature		1st Report in Are	eaLa	st Report in Are	ea	Supplemental R	eport	
Print Your Name								

Once you have finalized the report, you will need to click the **Payment Coupon** option. The Payment Coupon is the breakdown of contribution you will need to print and mail to Glaziers, Local 1399 H&W Fund

Note: you must always finalize your report once you are ready to send payment. This step will move your report into a permanent file. Once you finalize your report, you will not be able to change that report.

If you need to make an adjustment on a finalized report, contact the Trust Fund Office.

If You Have No Employees To Report

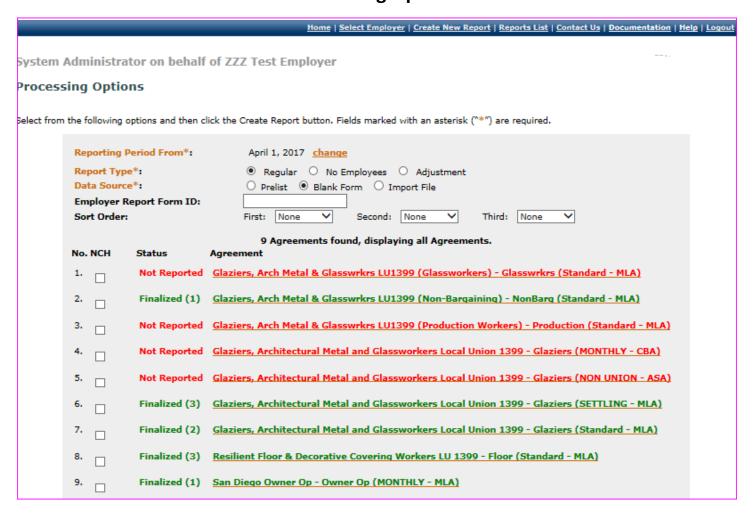
The same steps are used to file a no employees worked.





Select create a new report

Processing Options

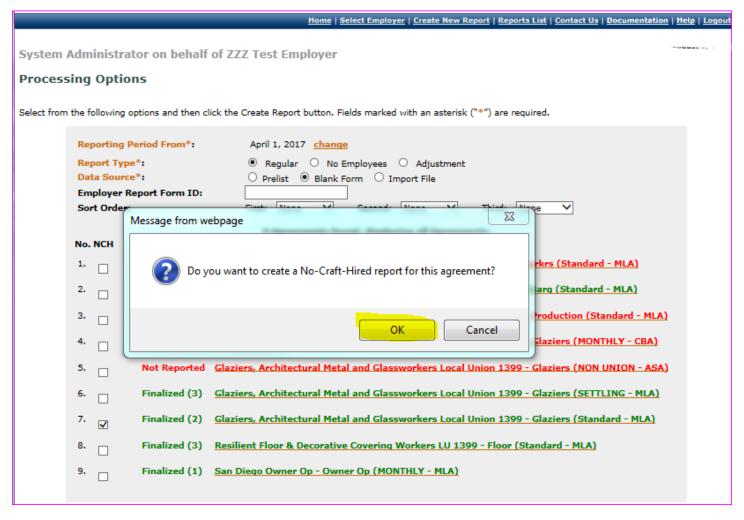


In the **PROCESSING OPTIONS** page, you will need to choose the Reporting Period you will be reporting by clicking on **change.**

From this page you can have various options to help you modify and simplify your report.

Agreement: Allows you to select the agreement for the type of work you will be reporting (only applicable if you have various types of agreements: I.e., Exhibit Builders, Sign Installation, Tradeshow Installers, etc.)

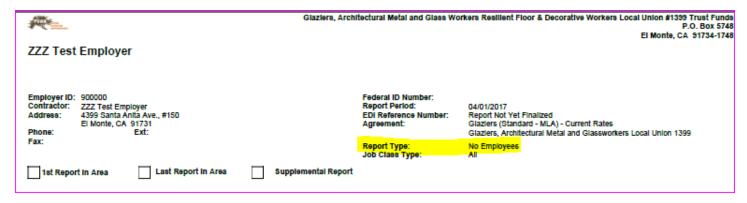
Report Type: You will need to select a report type, **Regular** for report with hours or **No Employee*** for a report with no employees worked for that month.



If you have no hours to report, click on, **NCH** and you will get a pop up asking "Do you want to create a No-Craft –Hired report for this agreement?" By clicking on OK the system will generate a "No Employees" report form.

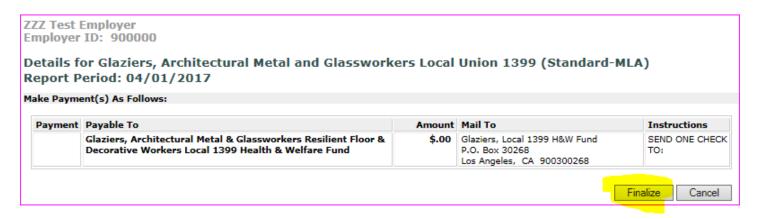


A messaage will appear asking to open or save. Select Open

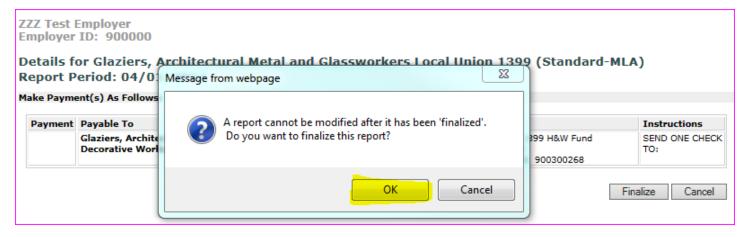




Computations of Payments window will open. Select Finalize



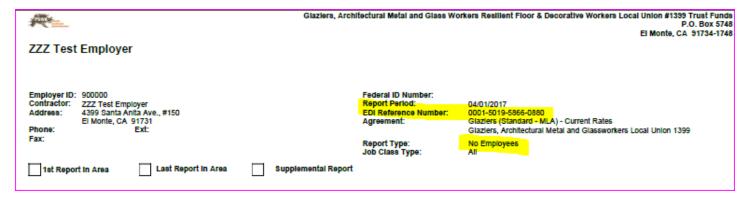
Select Finalize



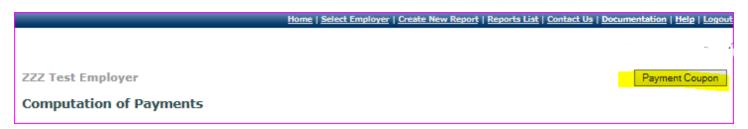
A message will pop up stating the report cannot be modified after it has been finalized. Select ok



A message will pop up asking to open or save. Select open.



The EDI number has been assigned to this report. Close window



Computation of Payment window will open. Select Payment Coupon



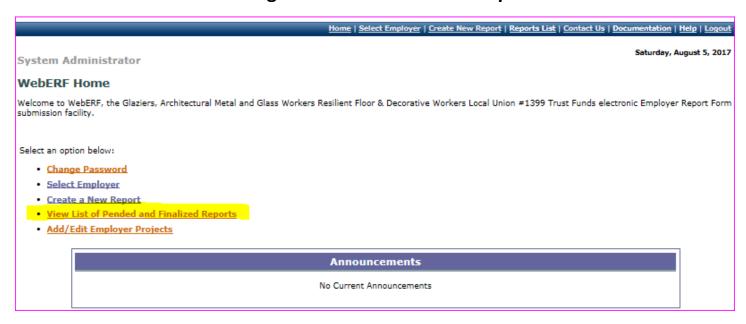
A message will pop up asking to open or save. Select open.

Coupon for No Employees Reported

*	Giaziers, Architectural Metal and Glass Workers Resilient Floor & Decorative Workers Local Union #1399 Trust Funds P.O. Box 5748 El Monte, C.A. 9.1734-1748						
Payment Coupon for ZZZ Test Employer		El MUIILE, CA 31/34-1/40					
Employer ID: 900000 Contractor: 222 Test Employer Address: 4399 Santa Anita Ave., #150 El Monte, CA 91731 Phone: Ext:	Federal ID Number: Report Period: EDI Reference Number: Agreement:	04/01/2017 0001-5019-5866-0880 Glaziers (Standard - MLA) - Current Rates Glaziers, Architectural Metal and Glassworkers Local Union 1399					
Fax: Contractor License: Business Type:	Report Type: Job Class Type:	No Employees All					
	Date Report Finalized:	08/05/2017					
REPORT DUE ON THE 20th OF THE MONTH							
Be sure to include the EDI Reference Number 0001-5019-5866-0880 in the Memo portion of check(s).							
Make Payment(s) As Follows: Payment Date Amount Due Payable To	Instructions	Mail To					
\$ 0.00	SEND ONE CHECK TO:	Glaziers, Local 1399 H&W Fund P.O. Box 30268 Los Angeles, CA 900300268					
Signature	1st Report In Area Last Re	port in Area Supplemental Report					
Print Your Name							

Mail Payment Coupon to Glaziers, Local 1399 H&W Fund.

Viewing Pended and Finalized Reports



WebERF offers simple online ways to keep track of all reports created.

To view any pended or finalized reports yu have created, click the <u>View List of Pended and Finalized Reports</u> link on the WebERF Home page, this will take you to the **Available Reports** page.



On the Available Reports page, you will see two lists. On the left you'll see all unfinished reports you have created, and on the right you'll see all finalized reports.

Clicking the [Del] link under the **Unfinished Report** list will delete any pended reports. You cannot delete any finalized reports as the system will not allow you.

Clicking on the link of any unfinished report will send you to the report form of that work period so it can be edited or finalized.