Introduction

This guide covers the basics of working with remittances in EmployerXG.

This guide walks you through the remittance workflow: add an employee to a remittance, edit the remittance, add the remittance to the payment cart, and pay for the remittance.

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Add a new employee to a remittance

Adding a new employee to a remittance is the first step in working with remittances. You need to add an employee to a remittance to begin calculating benefits.

1. In the Home tab Remittances Due listing, choose one of the following:

   - For remittances that have a status of **Due** or **In Progress**, click the remittance **Status** to view.
   - For remittances that have a status of **In Cart**, **Scheduled**, or **Saved For Later**, from the Your Remittances Due listing, click on the **Status** link for the remittance that you want to view. Then, click **Edit Remittance**.

2. Enter the SSN of the employee. The **Create Employee** window displays.
3. At a minimum, complete the Last Name field. Any field with an asterisk * next to it or a red border around it must be completed before you can continue. Birth Date is not necessary.

4. Click **validate**.

5. Ensure the JOB CLASS and PAC fund setting are correct.

6. Enter the Pac Amount deducted (PAC AMT$), the hours worked (HOURS) and school hours (SCHOOL HOURS) Then, press **Enter**.

4. Continue adding additional employees if needed.
Copy an existing remittance

Create a new remittance by copying information from an existing completed remittance. The copy feature saves you the time of having to make a new remittance from scratch and re-entering all your members. Keep in mind that you can't copy into remittances when the status is In Progress, In Cart, or Scheduled.

1. From the **Your Remittances Due** table on the Home page, click the remittance to copy to (don't click the remittance status, this will take you to the wrong page).

2. Click **Copy**.
3 Click the remittance to copy and click **Continue**. The **Employee Details** table for the new remittance displays.

- If the contracts associated with the remittances match, the ID, Name, and Quantities, or just the ID and Name will be copied depending on your setup (see **Set your preferences**).
- If the contracts associated with the remittance don't match, regardless of your configuration, only the ID and Name are copied.

4 Delete or add employees and quantities as necessary. Your edits save as you enter them.
Add remittance to cart

Before you can pay for a remittance, you have to add it to your payment cart.

1. From the Home page, click the remittance status to add to your payment cart.
   - If a message like the one shown below displays, click **Edit Remittance**.

   ![Remittance status message]

   - The Employees Detail page opens for the remittance.

2. Click **Add To Cart** at the bottom of the page. The remittance is added to your payment cart.

   ![Add To Cart button]

   - Next, you can choose to proceed to your cart, return to the Home page to complete additional remittances, or export the employee information to a spreadsheet.
Access the payment cart

View the remittances that are in your cart, a payment summary of the cart, and pay/schedule a payment for the remittances in your cart. There are two ways to access the payment cart.

**OPTION 1**

- Click an In Cart, Scheduled, or Saved for Later remittance, then click Open Cart from the Remittance message.

**OPTION 2**

- Hover over the cart icon in the ribbon to view a window containing a Payment Summary total. Click Proceed to Payment to open the payment cart. Alternatively, click the number to the right of the cart to access the payment cart.
Pay a remittance

Once the correct employees have been added to and adjusted in a remittance, you can pay for the remittance in the payment cart.

1. Hover over the cart icon in the ribbon. Click Proceed to Payment to open the payment cart.

2. From the payment cart Remittances In Cart table, click in the Payment Date to choose a date, or manually type in a date.

Note: If your portal is configured to do so, you can click either Select All Due to mark all the remittances as Due or Select All Due + Damages to mark all the remittances as Due + Damages. Contact your administrator for more information.

3. Unless your configuration has a default payment type, choose either Check, or eCheck as the Payment Method in the Payment Summary table.
4 Click **Apply Payment**.

- If the payment method is **Check**, the following message displays.

```
PAYMENT CONFIRMATION

Remittance Count: 3
Remittance Amount Due: $6,690.75
Damage Amount Due: $71,046.29
Total Amount Due: $71,624.08
Total Amount Paid: $1,492.99
Payment Date: 24/02/2017
Payment Method:

Press OK to confirm payment or Cancel to review your work.
After confirming you will be able to print a detailed payment receipt from the History tab.
You are paying for Group 0003 EFT!
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If the payment method is eCheck, a Payment Information window displays.

- a. Enter the required banking information.
- b. Click the check boxes to authorize the payment charge and accept the terms & conditions.
- c. Click OK. A summary of your payment displays.

5 Verify the information shown, then click OK. The remittances in the cart are processed, and you're directed to the History page where you can print a detailed receipt (see "View and print a remittance receipt" on page 11).
View and print a remittance receipt

Use 📃 Receipt in the History tab to create a PDF receipt of a submitted remittance. This feature is great for keeping your records up to date.

1. Click the History tab to view remittances that have been submitted.

2. From the Remittance Summary table in the History page, select the year associated with the remittance to view from the Year list menu.

3. Click the remittance to view.

4. Click 📃 Receipt.
**Note:** For submitted remittances, **Receipt** is replaced by a **Confirmation** button, but it functions the same way.

5. The PDF receipt downloads to your browser.
6. Click the PDF file to view the receipt.

7. Click 📨 at the top of the PDF viewer screen to print the receipt if needed.
Remittance History list

You can export a submitted remittance's summary table, shown on the History page, as a spreadsheet (.CSV file). This is great for keeping records of the remittance using hard copies of the tables. This feature is especially useful for record-keeping in preparation for an audit.

1. From the Home page, click the History tab.

2. Remittances are organized by year. Select the desired year above the remittance table.

3. Click a remittance from the Remittance Summary table.

4. Click Employees at the top right of the table.
   ■ The details of the remittance download as a spreadsheet.
Create a no work or supplemental remittance

Create a No Work remittance
Submit a No Work remittance to your fund office when you have no work to report for the listed employees on a remittance.

1. From the Home page Remittances Due table, check the remittances that have no work reported.
2. Click No Work.
3. Click Yes to confirm. The No Work report submits.
4. Click OK.
Create a supplemental remittance

Create a supplemental remittance when you need to add additional information to a remittance. See the end of this topic for information on creating a No Work remittance.

⚠️ Important! Contact your fund office before creating a remittance that doesn’t display in the list.

1. From the Home page Remittances Due table, click **Create Remittance**.  
   - The **Create New Remittance** window displays.

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Create a no work or supplemental remittance
2. **Select a Payroll From Date and Payroll Thru Date.** Any field with an asterisk * next to it or a red border around it must be completed before you can continue.

3. Click **Get Agreements.** A list of agreements available for the payroll dates display.

4. Click the appropriate agreement from the list.

5. Click **Continue.** A confirmation message displays and you're returned to the Remittances Due table with the newly-created remittance highlighted.