#### 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 <a href="https://uaw.weberf.com">https://uaw.weberf.com</a> in your web browser's address bar. This will open the Terms of Use. To continue you must click on I Agree tab.

#### **UAW Labor-Management Group Pension Plan**

## **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 150 \* El Monte, CA 91731
Office Hours: Monday - Friday, 8:00 a.m. to 5:00 p.m. (PST)
Phone: (626) 279-3072 or (626) 279-3046

l Agree

<sup>\*</sup>Google has dropped support many 3<sup>rd</sup> party plug-ins. The pdf files created by WebERF are not supported on Google Chrome.

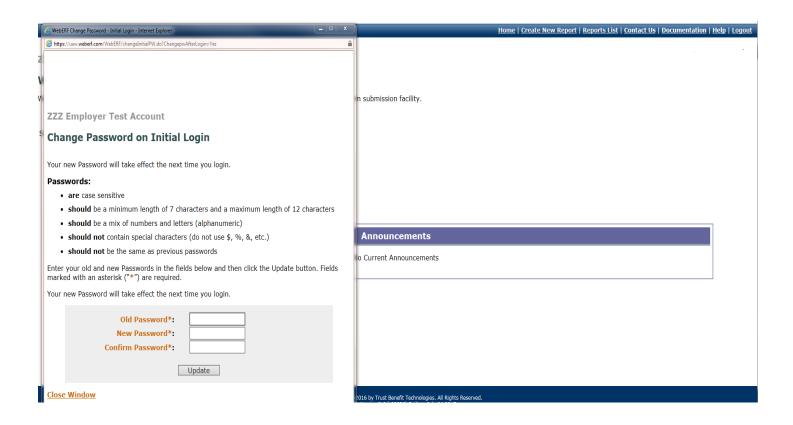
# **Site Login**

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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**

| Home | Select Employer | Create New Report | Reports List | Contact Us | Documentation | Help | Logout

**System Administrator** 

#### **WebERF Home**

Welcome to WebERF, the UAW Labor-Management Group Pension Plan electronic Employer Report Form submission facility.

Select an option below:

- Change Password
- Select Employer
- Create a New Report
- View List of Pended and Finalized Reports
- Add/Edit Employer Projects



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.

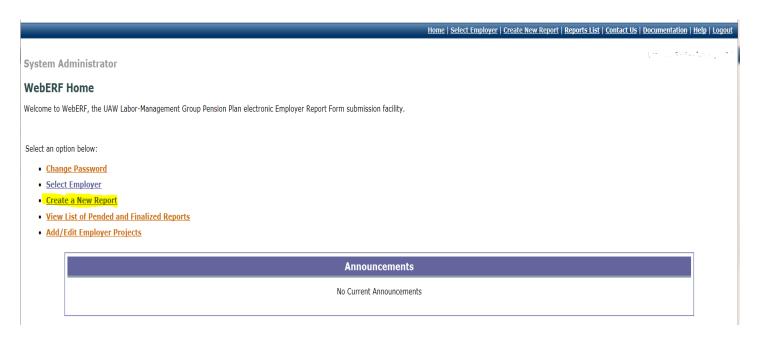
<u>View List of Pended and Finalized Reports:</u> This link lets you view all past and current unfinished and finalized reports.

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

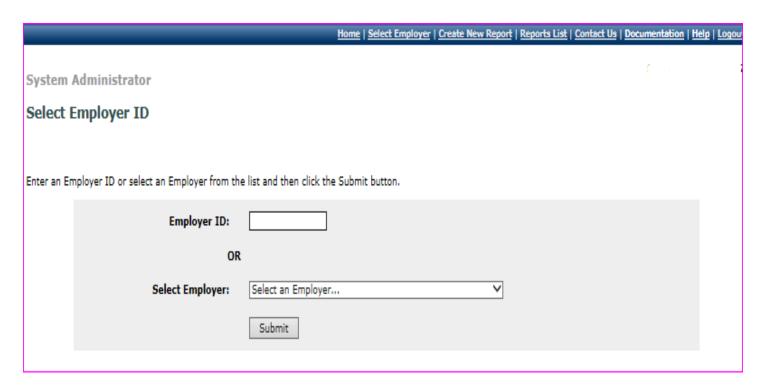
Add/Edit Projects: This link allows you to view all projects that are setup on your account.

<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**

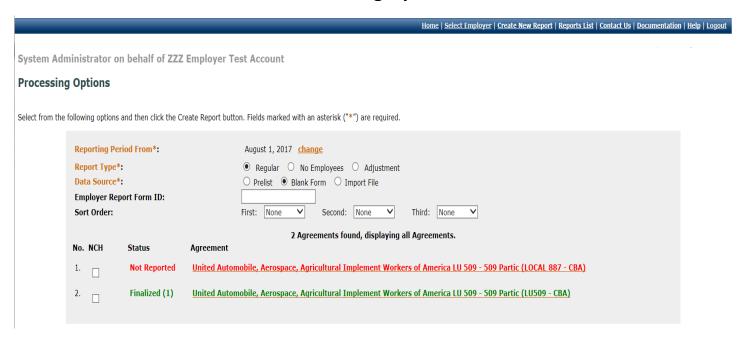


To create a new report, click on the <u>Create New Report</u> hyperlink. This will take you to the **PROCESSING OPTIONS** page.



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.

**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.

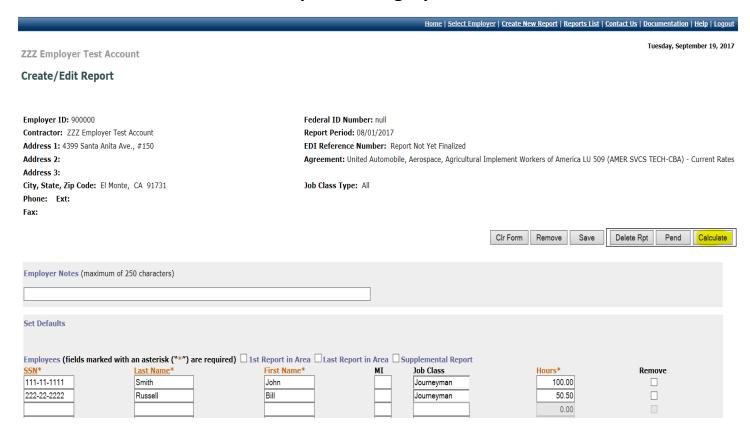
Agreements that you are required to report will be listed under **Agreement.** This also gives you information if you have **Not Reported** or have **finalized** any reports. Select and click on the **Agreement** option you will be reporting.

# **General Reporting Information**

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

	<u>Home</u>   <u>Select Emplo</u>	<u>ver   Create New Report   Reports List   Contac</u>	t Us   Documentation   Help   Logout
ZZZ Employer Test Account			,
Create/Edit Report			
Employer ID: 900000	Federal ID Number: null		
Contractor: ZZZ Employer Test Account	Report Period: 08/01/2017		
Address 1: 4399 Santa Anita Ave., #150 Address 2:	EDI Reference Number: Report Not Yet Fina		EOO (LUEOO CDA) Current Dates
Address 3:	<b>Agreement:</b> United Automobile, Aerospace, Ag	pricultural Implement Workers of America LC	509 (LUSU9-CBA) - Current Rates
City, State, Zip Code: El Monte, CA 91731	Job Class Type: All		
Phone: Ext:			
Fax:			
		Clr Form Remove Save Del	ete Rpt Pend Calculate
Employer Notes (maximum of 250 characters)			
Set Defaults			
Employees (fields marked with an asterisk (**") are required) \sum_1st Report in Area \sum_Last I	Report in Area Supplemental Report		
SSN* Last Name* First Name*	MI Job Class	Hours*	Remove
		0.00	
		0.00	П
		0.00	

## **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.

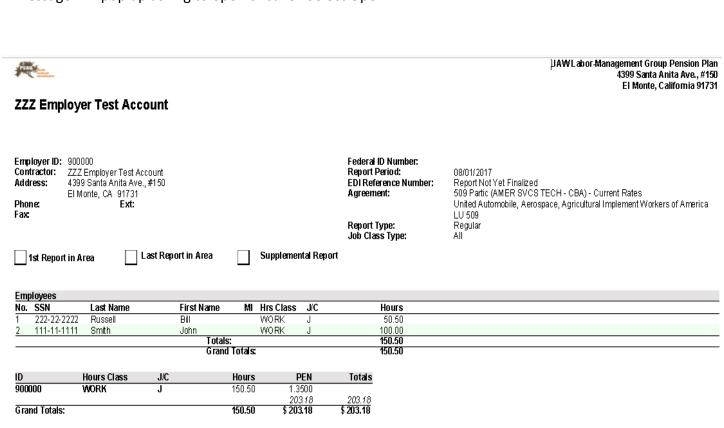
**Pend**: Pends your report for future editing/adding of information you have added.

**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.

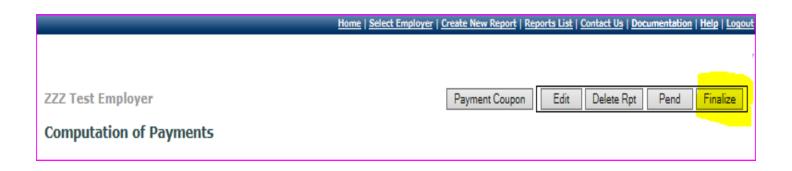
## **Computation of Payment**



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

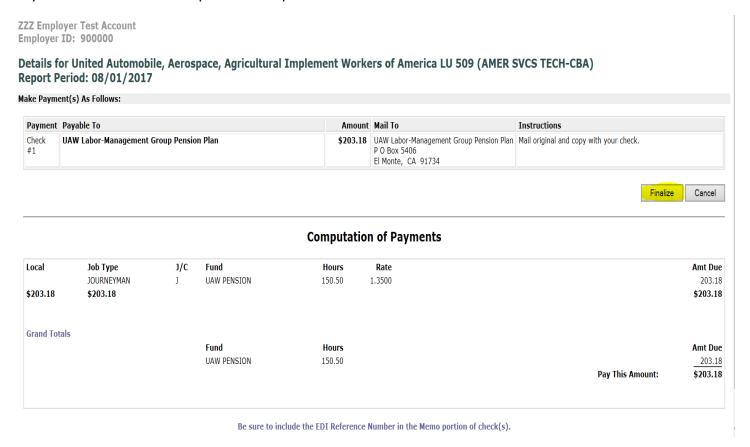


The **COMPUTATION OF PAYMENT** page provides a complete and thorough breakdown of the contributions you will need to submit. This page also shows the total contribution amount you will need to submit. Close the window

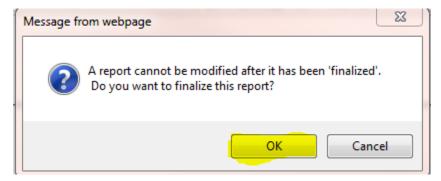


### **Finalizing your Report**

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.



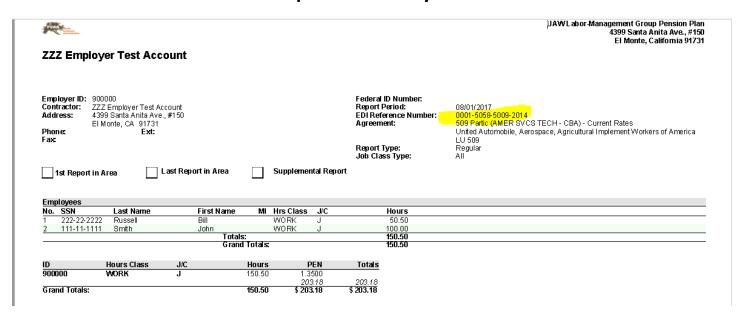
Message will pop up advising a report cannot be modified after it has been 'finalized'. Click on OK to complete Report Form.



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**



UAWLabor-Management Group Pension Plan 4399 Santa Anita Ave., #150 El Monte, California 91731

#### **Payment Coupon for ZZZ Employer Test Account**

Employer ID: 900000

Contractor: ZZZ Employer Test Account Address: 4399 Santa Anita Ave., #150

El Monte, CA 91731

Contractor License: Business Type:

Federal ID Number: Report Period: EDI Reference Number:

Agreement:

08/01/2017 0001-5058-5009-2014 509 Partic (AMER SVCS TECH - CBA) - Current Rates

United Automobile, Aerospace, Agricultural Implement Workers of America

Report Type: Regular Job Class Type: Date Report Finalized: All 09/19/2017

ID	Hours Class	J/C	Hours	PEN	Totals
900000	WORK	J	150.50	1.3500	
				203.18	203.18
Grand Totals	:		150.50	\$ 203.18	\$ 203.18

#### REPORT DUE ON THE 15th OF THE MONTH

Be sure to include the EDI Reference Number 0001-5058-5009-2014 in the Memo portion of check(s).

Make Payment(s) As Follows: Payment Date	Amount Due Payable To	Instructions	Mail To
Check#1	\$ 203.18 UAW Labor-Management Group Pension Plan	Mail original and copy with your check.	UAW Labor-Management Group Pension Plan P O Box 5406 El Monte, CA 91734
Signature	1st Rep	ort in AreaLast Report in Ar	ea Supplemental Report
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 UAW-Trust 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.



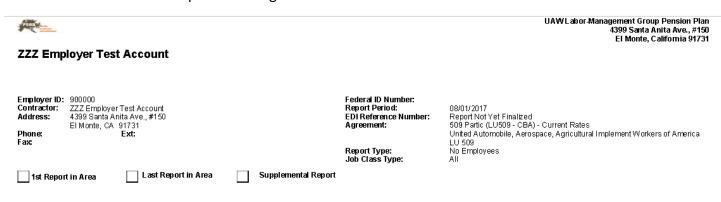
If you have no hours to report, click on, **NCH** and you will get a pop up asking "Do you want to create a No-Craft –Hired report for this agreement?" By clicking on OK the system will generate a "No Employees" report form.

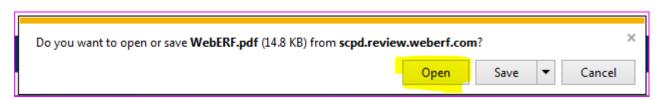


Pop up Message below will appear at bottom of screen. Select open.

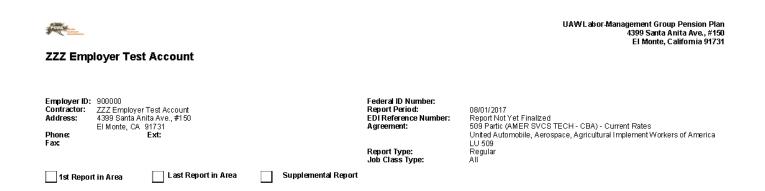


Review window below will opens showing no members and hours. Close window.





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



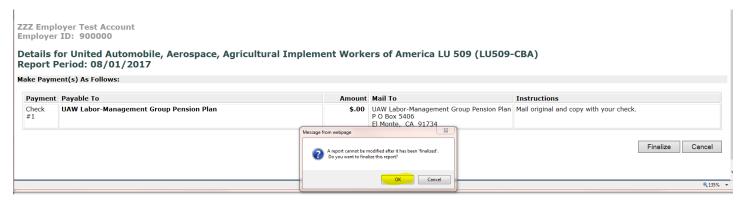
Review window opens. Close window



#### Computations of Payments window will open. Select Finalize



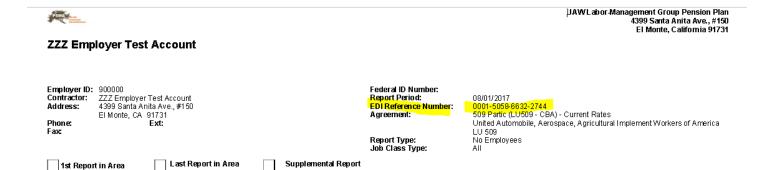
#### Select Finalize



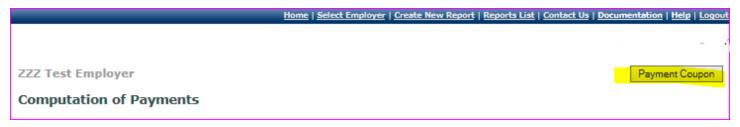
A message will pop up stating the report cannot be modified after it has been finalized. Select ok



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



Your report will now have an EDI Reference Number indicating transaction is now complete. 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**

Employer ID:	900000	Federal ID Number:	
Contractor: Address: Phone: Fax:	ZZZ Employer Test Account 4399 Santa Anita Ave., #150 El Monte, CA 91731 Ext:	Report Period: Report Period: EDI Reference Number Agreement:	08/01/2017 0001-5058-6632-2744 509 Partic (LU509 - CBA) - Current Rates United Automobile, Aerospace, Agricultural Implement Workers of A LU 509
Contractor Li Business Typ		Report Type: Job Class Type:	No Employees All
		Date Report Finalized:	: 09/19/2017
		ORT DUE ON THE 15th OF TH	HE MONTH
Make Paymer Payment		·	HE MONTH
	Be sure to include the E t(s) As Follows:	ORT DUE ON THE 15th OF TH DI Reference Number 0001-5058-6632-2744	HE MONTH in the Memo portion of check(s). Mail To

Mail Payment Coupon to UAW – Trust 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 you 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.

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.

On the right you'll see all **Finalized Reports**. Open the year you want to view to select the specific work period. You cannot delete any finalized reports as the system will not allow you.