

Quick Start User Guide*

Employer Self Service(ERSS)

CSV Format Import/Export



1. Contact Carpenter Funds Administrative Office (CFAO) at OnlineERreporting@carpenterfunds.com to enroll in ERSS.
2. Log in using the temporary password assigned by CFAO; change the password to a unique password.
3. Helpful Hints
 - a. User may enter data in a Work Report that is in Initial Status only.
 - b. Initial Billing Report will default to the month after the last work month submitted.
 - c. If entering a new employee, type in the Social Security number and make sure the name that populates is that of your employee. If the name does not populate, use the [contact us](#) button at the bottom of the web page or email OnlineERreporting@carpenterfunds.com for assistance.
 - d. Review the Summary prior to submitting your report. (You will not be able to Edit a report that has been submitted).
 - e. If you receive an Error Message, you are required to correct the indicated error(s) prior to submitting your report.
 - f. Never use the browser's back button. This will cause the session to end and any unsaved data will be lost.

How to process a Billing Report using CSV format**

Using this reporting option, you will be able to Export once and modify it for a new Import each month OR Export a new report each month going forward. Note: you are not able to a new Import File unless there is a report in Initial Status. Note: If you are adding an employee to your monthly report that is not in the Export, you may wish to

Exporting a file from ERSS to your computer (you may export once and continue to modify the file to submit ongoing reports):

1. Choose Export Existing System Data from Home Page, this will take you to the Export Screen
2. Select New
3. New Export Pop-up screen
 - a. Select CSV format
 - b. Enter your 12 digit account number
 - c. Use drop down to select the appropriate work month
 - d. Save and Close the windows
 - e. Once returned to the Export page
 - i. select appropriate work month
 - ii. b. select Download (if selection does not appear you may click the Refresh the page)

- f. From File Download pop-up, choose SAVE
 - i. a. From SAVE AS window, you will now save a copy to your computer for data entry.
 - g. Include the Work Month in the File name
 - h. Include the file extension of .CSV in the File name
 - i. SAVE
 - j. Close Download Complete Pop-up
6. Open the file in you just exported from ERSS to your computer using Excel. Select File Type: All Files otherwise the File will open in NotePad. Do not change the formatting or width of the file. This will cause the file to ERROR.
- a. Enter the hours worked for each employee in the HW column. You do not need to enter hours in all the Funds unless they are reported differently.
 - b. Enter new employees by inserting their Social Security Number in Column A in the first empty row of the spread sheet.
 - c. SAVE – Save As: 123456112011.csv
 - i. File name must include your six digit account number
 - ii. File name must include the work month as MMYYYY
 - iii. File TYPE must be .CSV
7. Once you have updated the file for the current reporting period you may Import the file for processing online in ERSS. See below.

Importing a file from your computer to ERSS for processing:

- A. Open ERSS homepage
- B. Log In
- C. Click I want to: Import Files
- D. Click NEW. New Import window appears:
- E. Import Name: Select Employer Monthly Hours Import CSV
- F. File name – this is the file you just saved to your computer after you modified it. If you use the Browse button, select the appropriate file name
- G. Enter Import Description. Include your Account number and work month
- H. Parameters: Enter your full 12 digit account number
- I. Work Month, select from the drop down the appropriate month that is in initial status.
- J. SAVE
- K. Pop up will advise you that the File has been successfully imported into ERSS.
 - a. Close
- L. You will be brought back to the Import Files tab
- M. The file will indicate Status – Not Processed.
- N. Click "Validate",
- O. Status changes to Queues Validation Request.
- P. Refresh the screen if necessary using the Refresh tab
- Q. The Status will change to one of the following:
- R. Validated, proceed to step d.
- S. Validated with Exceptions.
 - a. Import Details
 - b. Select Process Flag: Exceptions, you may either attempt to correct these exceptions or SAVE.
- T. Validated with ERRORS. You will not be able to continue until these errors are resolved. You have two options, open the file you imported and make corrections

- OR VOID that file, make changes to the one you saved on your computer and reimport using steps 1-2
- U. Once you are satisfied with the Imported report that has been validated
 - V. Select "Process"
 - a. ii. A pop up will confirm you have selected to Process, click OK
 - b. iii. You will be returned to the Import Files page and the Process Status will reflect "Completed"
 - W. Note: you must continue to complete the report processing
 - X. From the drop down: I want to: select "Reports, Billing, History & Payments Option"
 - a. Click on the report in Initial Status for the correct work month
 - b. Click Edit Work Report
 - c. Review Report Summary
 - d. Correct error(s), if any
 - e. Review Report for final time
 - f. Submit
 - g. Save a copy of the file on your network for your records
 - h. Print a Deposit Slip from the WORK REPORTS screen
 - i. Mail the Deposit Slip and your check to the bank address provided.

This Quick Start User Guide is intended to summarize processing of monthly reports. A detailed explanation for each step is found in the Employer Self Service User Guide that was sent to you upon enrollment in ERSS. This guide is also available online at:

www.carpenterfunds.com/PDF/Employers/OnlineReporting/erss_user_guide.pdf

****A Text Import/Export format is also available. Refer to the full Employer Self Service User Guide mentioned above for details. While this option is available, CSV format is recommended.**