



Using ET on the Web

ET Web

The Web version of ET has **Employer** options which enable employers to enter and submit transmittal information through the Web, eliminating the need to send transmittals on paper. Employers access employees for the previous month, and can add or remove employees or enter information for existing employees. ET Web version is accessed from the GEMGroup Web site using a Web browser.

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Logging in and out of ET on the Web

Follow these steps to log into the Web version of ET.

1. In your Web browser, type <http://www.gemgroup.com>.
2. Click the **Emerald-Trac** link in the left-hand column to open the ET Web product page.



The screenshot shows the GEM GROUP website. The top navigation bar includes links for Home, About Us, Products & Services, Full Service Office Locations, Employment Opportunities, and Contact Us. A left-hand navigation menu is expanded to show 'Client Interactive Service' options. The 'Emerald-Trac' link is highlighted with a black arrow. Below the navigation menu, a large banner image shows two business people shaking hands, with the text 'Where Time Honored Trust Meets 21st Century Capabilities'. To the right of the banner, the mission statement is displayed with three bullet points, each preceded by a checkmark. At the bottom right of the banner area, there is a green play button icon.

Client Interactive Service

- Topaz-Direct
 - Participant-directed investment programs
- Ruby-Plus
- Health Claim Access
- **Emerald-Trac**
 - Benefit plan access for:
 - Health and Welfare Plans
 - Defined Benefit Plans
 - Defined Contribution Plans
 - Savings Plans
 - Ancillary Funds
- Employer Contribution Upload

For Better Health

- Health & Medical Web Sites
- Preferred Provider Web Sites

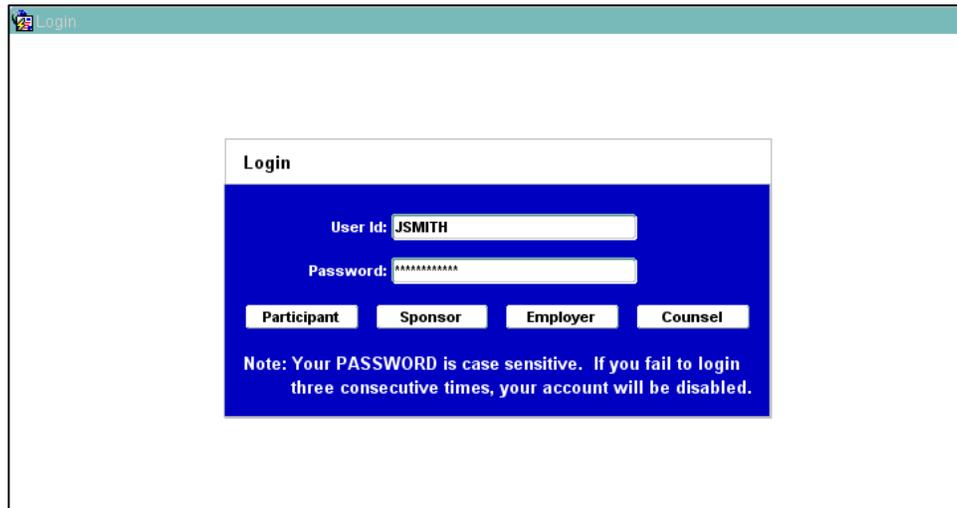
Read

Where Time Honored Trust Meets 21st Century Capabilities

Our Mission Statement pledges our commitment to:

- ✓ Provide the most efficient, highest quality employee benefit administrative services to single, multiple, and multi-employer benefit plan clients.
- ✓ Employ state-of-the-art computing and record-keeping systems.
- ✓ Ensure second-to-none customer service in pursuit of total excellence on behalf of our client plans and the participants and families they serve.

3. Click **Continue**. The **Login** page opens.



The screenshot shows a web browser window titled "Login". Inside the window is a login form with a blue background. The form has a title "Login" at the top. Below the title are two input fields: "User Id:" with the text "JSMITH" and "Password:" with a masked password "*****". Below the input fields are four buttons: "Participant", "Sponsor", "Employer", and "Counsel". At the bottom of the form, there is a note: "Note: Your PASSWORD is case sensitive. If you fail to login three consecutive times, your account will be disabled."

4. Enter the **User Id** and **Password** provided to you and click the button that corresponds to the type of login that applies to your role. The page that opens depends on your login.

Note Access is denied and your account is locked if you enter an incorrect User ID and/or Password three consecutive times in one day. Access is reset the next business day and you can attempt the login process again. Contact us if problems persist with logging in, or you lose your User ID or Password.

Transmittal file upload

Employers can use ET to enter transmittal document data directly. In addition, employers can use FTP to submit transmittal files that we can upload into ET and process for them.

The transmittal documents are submitted as text files. The format can vary but in general, the file will contain the participant name and address, ID number or social security number (usually encoded), hire and termination dates, base values and the dollar amounts submitted for active employees, and total amounts for this work period.

You will be instructed on how to name and format the transmittal files you submit so that the data can be properly imported into ET. Contact your Account Manager or the Transmittal Department for more information.

Follow these steps when you are ready to upload transmittal files.

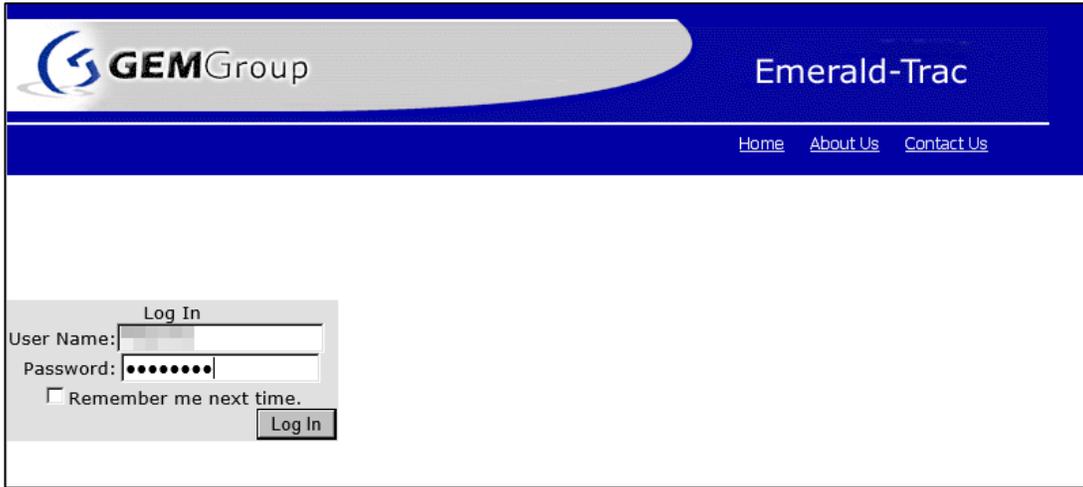
1. In your Web browser, type <http://www.gemgroup.com>.



The screenshot shows the GEM GROUP website. The top navigation bar includes links for Home, About Us, Products & Services, Full Service Office Locations, Employment Opportunities, and Contact Us. The left-hand column contains a menu with the following items: Client Interactive Service (with sub-links for Topaz-Direct, Ruby-Plus, and Emerald-Trac), Employer Contribution Upload (highlighted with a red arrow), For Better Health, and Read. The main content area features a banner with the text "Where Time Honored Trust Meets 21st Century Capabilities" and a handshake image. Below the banner is a mission statement with three bullet points, each preceded by a checkmark. A red arrow points from the "Employer Contribution Upload" link to the text "Click to upload transmittal files". The Emerald-Trac logo is visible at the bottom right of the main content area.

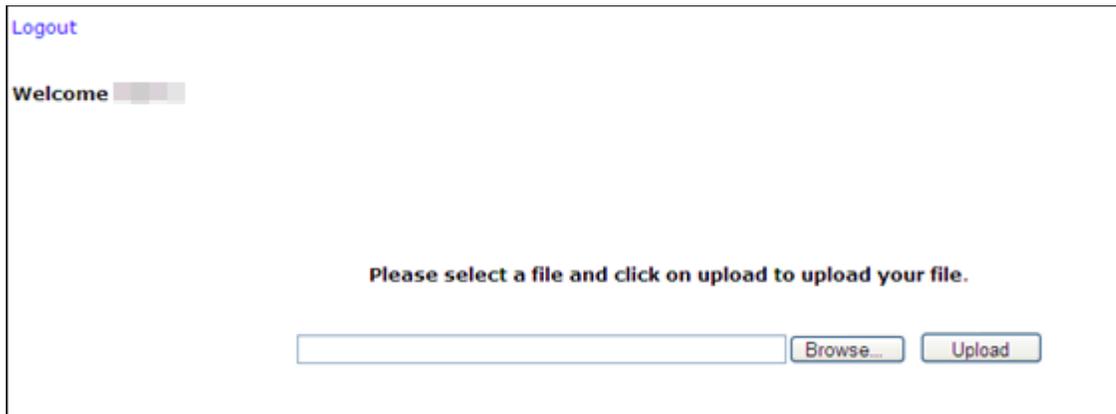
2. Click the **Employer Contribution Upload** in the left-hand column. The login page opens.

3. Type the same **User Name** and **Password** you use to log into ET Web, and click **Log In**.



The screenshot shows the Emerald-Trac login interface. At the top left is the GEM Group logo. At the top right is the text "Emerald-Trac" with navigation links for "Home", "About Us", and "Contact Us". Below this is a "Log In" form with fields for "User Name:" and "Password:" (masked with dots). There is a checkbox for "Remember me next time." and a "Log In" button.

4. The **Welcome** page opens. Type the full path name and file name of the file to upload, or click **Browse** to locate the file on your computer.

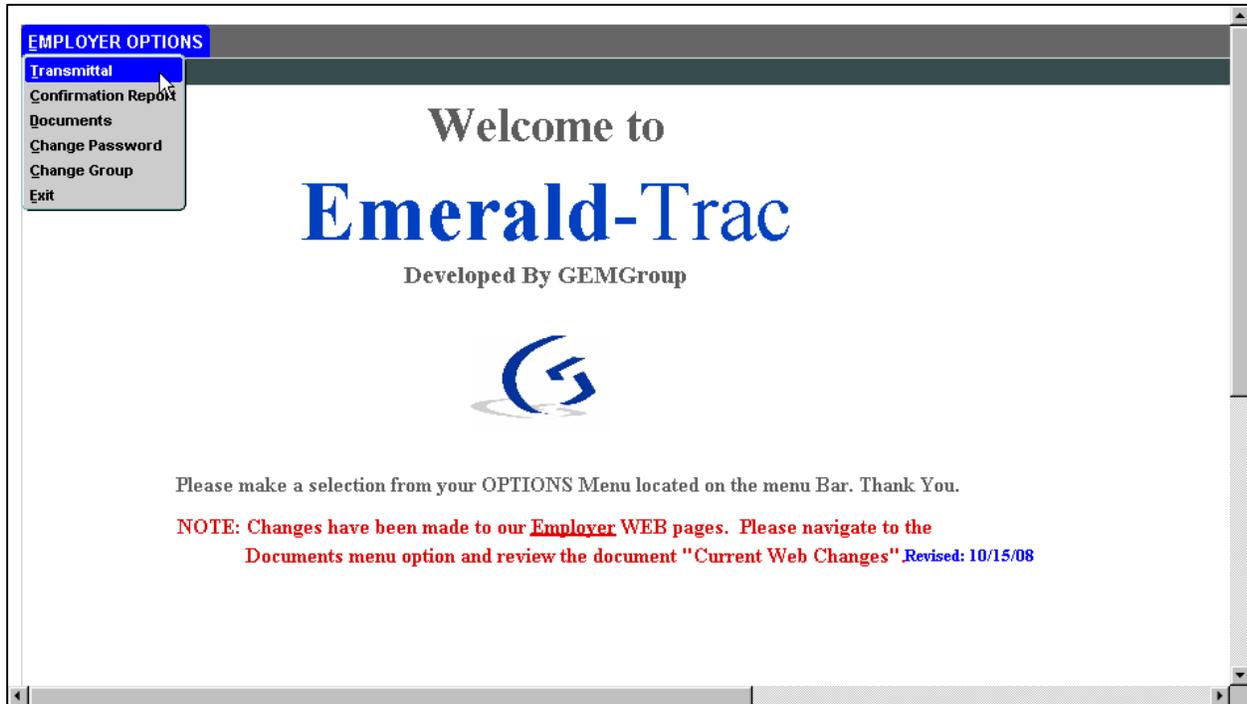


The screenshot shows the file upload page. At the top left is a "Logout" link. Below it is a "Welcome" message followed by a blurred name. The main content area contains the instruction "Please select a file and click on upload to upload your file." Below this is a text input field, a "Browse..." button, and an "Upload" button.

5. Click **Upload**. You see a message if your file is uploaded successfully. Contact us if problems occur.

Employer Options

Employer options enable employers to enter and submit transmittal information through the Web, eliminating the need to send transmittals on paper. Employers access employees for the previous month, and can add or remove employees or enter information for existing employees. ET calculates the amount due from the employer based on the current contract and skill levels. The employer prints the calculated amount and submits the payment.

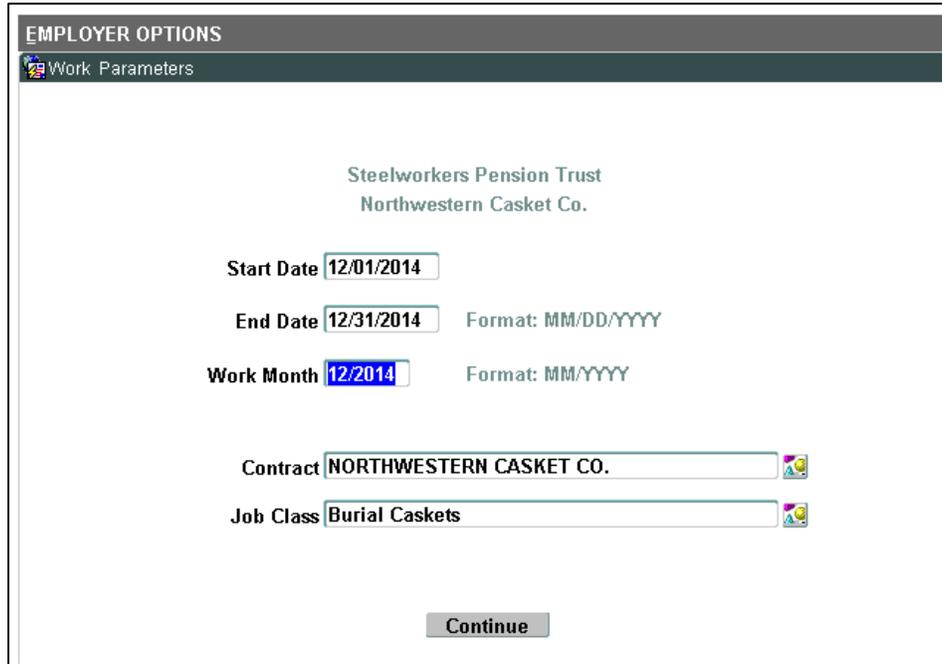


Note Not all options shown above are available for all groups.

Employer submitting a transmittal document

Follow these steps to submit a transmittal.

1. Select **Transmittal**. The **Work Parameters** screen opens.



EMPLOYER OPTIONS
Work Parameters

Steelworkers Pension Trust
Northwestern Casket Co.

Start Date

End Date Format: MM/DD/YYYY

Work Month Format: MM/YYYY

Contract 

Job Class 

2. Type the **Start Date** and **End Date** for the reporting periods.
3. Type the **Work Month** and **Pay Date** to which this information is to be credited.
4. From the **Contract** list of values (LOV), select the contract through which the report is being submitted.
5. From the **Job Class** LOV, select the appropriate job class.
6. Click **Continue**. A message appears.
7. Click **OK**. The **Employment Confirmation** screen opens.

Adding and removing employees

Use the **Employment Confirmation** screen to add additional employees for the transmittal. ET first looks for all participants reported on the last paid and submitted transmittal. If no participants are found a message appears. Typically, this occurs the first time you use ET to submit a transmittal. Click **OK** to close the message.

EMPLOYER OPTIONS

Participants

Employment Confirmation

Clear Record Period 12/01/2014 - 12/31/2014 Save Continue
 Work Month 12/2014

Please enter new employees with hire date and terminate any employees with termination date.

Last Name	M.I.	First Name	SSN	Gender	Birth Date	Death Date	Hire Date	Termination Date	Assumed Skill	Reported Skill	Status Code	Status Description	Status Date	Address
		Brian		Male			03/20/1985		JRNY	JRNY	ACT	Active	03/20/1985	Address
		Austin		Male			05/23/2011		JRNY	JRNY	PLO	Paid Layoff	10/10/2014	Address
		Peter		Male			07/25/2005		JRNY	JRNY	ACT	Active	07/25/2005	Address
		Robert		Male			09/02/2014		JRNY	JRNY	ACT	Active	09/02/2014	Address
	M	Rosa		Female			01/23/2006		JRNY	JRNY	ACT	Active	01/23/2006	Address
		Igor		Male			02/14/2006		JRNY	JRNY	ACT	Active	02/14/2006	Address
		Vera		Female			01/13/1998		JRNY	JRNY	ACT	Active	01/13/1998	Address
		Cheryl		Female			02/25/1985		JRNY	JRNY	ACT	Active	02/25/1985	Address
	N	John		Male			07/30/2007		JRNY	JRNY	ACT	Active	07/30/2007	Address
	T	James		Male			04/02/2012		JRNY	JRNY	ACT	Active	04/02/2012	Address
														Address
														Address
														Address

Adding employees

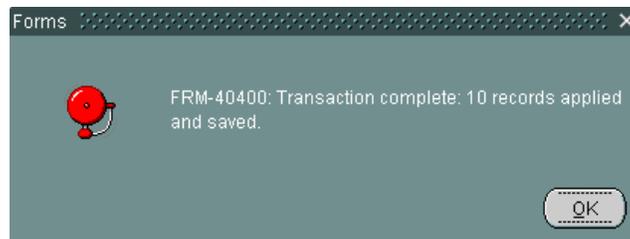
To add a new employee, follow these steps.

1. Type all of the new employee information on a blank line. The **Hire Date** must be entered. Do not type a **Termination Date** unless you want to remove an existing employee. If you make a mistake while entering data and need to start over, click **Clear Record**. Click **Address** to add or edit the employee address.

Note If an employee has completed work for you in this period using separate skill levels, you must create another entry for that employee and select the corresponding skill level.

You see a message if the employee data is not in ET or is not assigned to your group. You have the option of adding the participant as a new employee, associating the employee to the group, or discontinuing the entry.

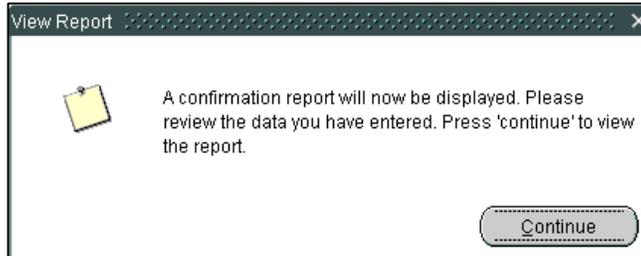
2. Click **Save** to save new entries. This is useful if you want to exit ET Web and return to enter more employee data before submitting the transmittal for processing.
3. Click **Continue** when all employee information is current and click **OK** on the message that opens.



Using ET on the Web



Click **Calculate** after all values and totals and click **OK** to continue. A preliminary report opens for you to review and confirm. Click **Continue**.



Transmittal confirmation

ET calculates the amounts due to the funds and the amount owed by the employer. A detailed confirmation report opens on a separate tab as a PDF, similar to the sample below.

Preliminary Review Report Only

Entered On: 01/15/2015

Page 1 of 2

<p>Group SPT Steelworkers Pension Trust</p> <p>Agreement 823 NORTHWESTERN CASKET CO.</p> <p>Job Class Burial Caskets Steelworkers Pension Trust</p> <p>Reported By Northwestern Casket Co. 41-0450500 4300 QUEBEC AVE N NEW HOPE, MN 55428</p>	<p>Reported For December 2014</p> <p>Dates Included From 12/01/2014 12/31/2014</p>
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Partname	Ssn	Gross Wages
		1,234.00
		2,311.00
		2,100.00
		1,432.00
		1,987.00
		1,000.00
		2,000.00
		1,000.00
		2,000.00
		1,000.00
		16,064.00

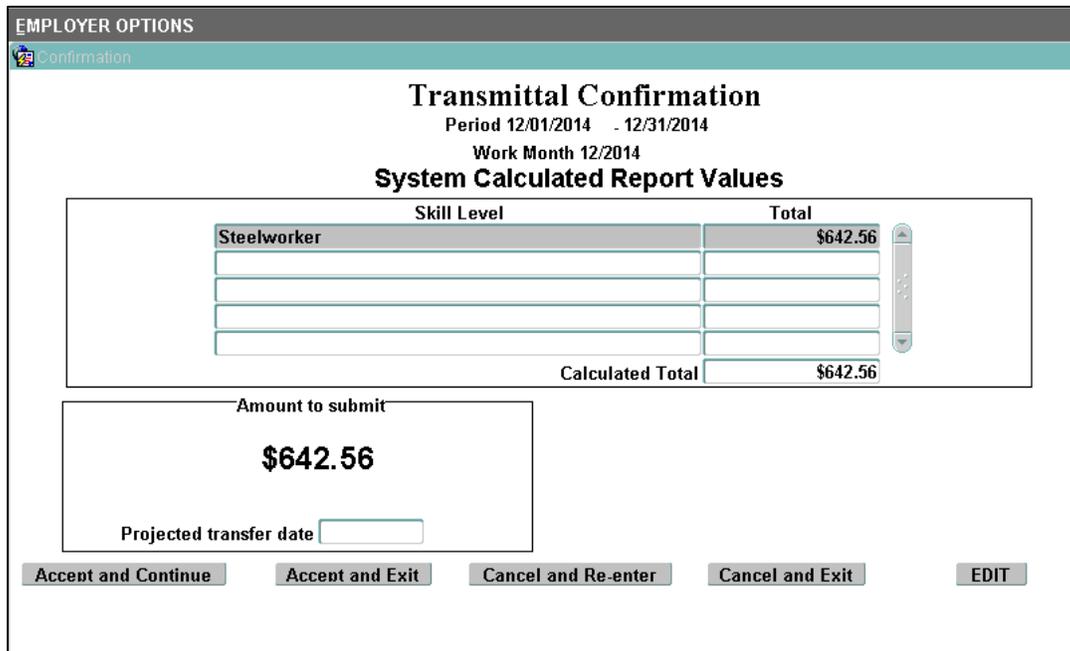
Skill Level	Fund Name	Base Type	Base Value	Rate	Totals
Steelworker	Steelworkers Pension Trust	Gross Wages	16,064.00	0.040	642.56
Amount to Submit:					642.56

Skill Level	Base Type	Base Value	Total
Steelworker	Gross Wages	16,064.00	642.56
Total for This Skill Level:			642.56

WB00001

You can print or save the PDF if needed.

On the Web page, click Close message to view the transmittal confirmation summary.

The main screen is titled "EMPLOYER OPTIONS" and "Confirmation". The main heading is "Transmittal Confirmation" for the period "12/01/2014 - 12/31/2014" and "Work Month 12/2014". Below this is a section for "System Calculated Report Values".

Skill Level	Total
Steelworker	\$642.56
Calculated Total	\$642.56

Below the table, the "Amount to submit" is displayed as **\$642.56**. There is a field for "Projected transfer date". At the bottom, there are five buttons: "Accept and Continue", "Accept and Exit", "Cancel and Re-enter", "Cancel and Exit", and "EDIT".

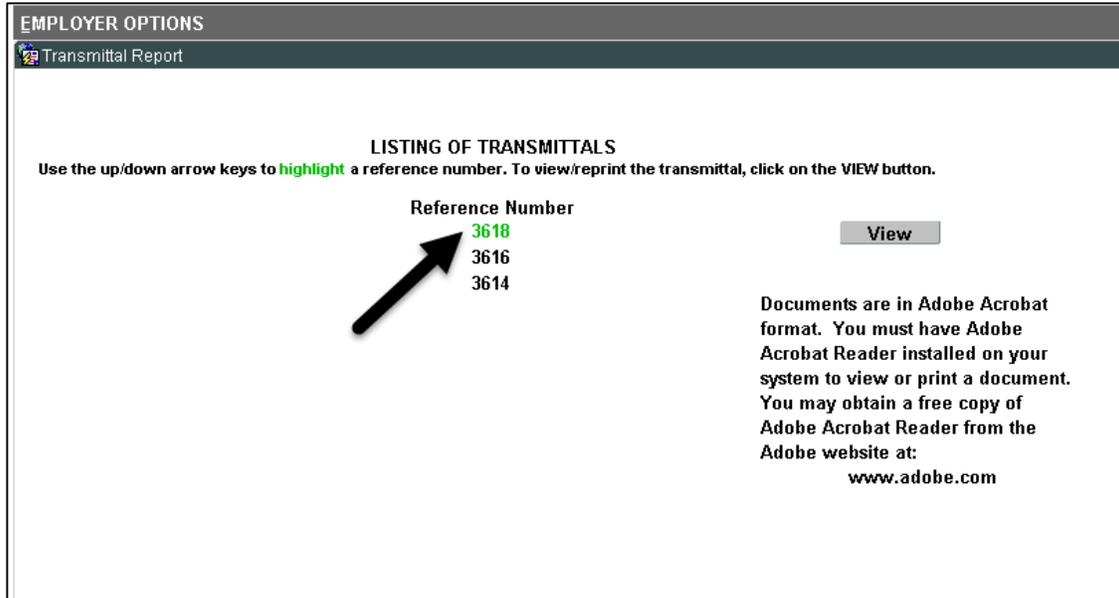
On the **Transmittal Confirmation** screen, select from one of the five buttons.

Button	Action
Accept and Continue	<p>Click this button to accept the calculated amount with the intention of submitting a wire transfer or mailing a check to cover the amount. A Projected transfer date must also be entered. Using this button indicates that you will continue to enter and submit transmittal documents.</p> <p>A message opens with a transaction number. Write down the transaction number for reference when making inquiries and then click OK.</p> <p>ET generates a Transmittal Confirmation Listing, which should be signed and returned with the remittance. Transmittal processing is not final until payment is received.</p>
Accept and Exit	<p>Click this button to accept the calculated amount with the intention of submitting a wire transfer or mailing a check to cover the amount. A Projected transfer date must also be entered. Using this button indicates that you are finished entering transmittal documents and want to exit ET.</p>

Button	Action
	<p>A message opens with a transaction number. Write down the transaction number for reference when making inquiries and then click OK.</p> <p>ET generates a Transmittal Confirmation Listing, which should be signed and returned with the remittance. Transmittal processing is not final until payment is received.</p>
Cancel and Continue	Click this button to clear any submitted information from the currently entered transmittal and start over.
Cancel and Exit	Click this button to clear any submitted information and exit ET.
EDIT	<p>Click this button to indicate disagreement with the report data reviewed and make changes. The EDITING DATA message box allows you to select the data to edit, either Employee or Hours.</p> <div data-bbox="641 835 1203 1062" data-label="Image"> </div> <ul style="list-style-type: none"> • Employee opens the Employment Confirmation Edit screen. You cannot enter a duplicate SSN. • Hours opens the Transmittals Processing Edit form. Click the Back button on this screen to make changes to the Employment Confirmation Edit screen.

Accessing confirmation reports

You can access confirmation reports from previously submitted Web transmittals by selecting **Confirmation Report** from the **EMPLOYER OPTIONS** menu. The up and down arrow keys on your keyboard can be used to select the document, which appears highlighted on the screen. Click **View** to open the PDF in Adobe Acrobat®.



EMPLOYER OPTIONS
Transmittal Report

LISTING OF TRANSMITTALS
Use the up/down arrow keys to **highlight** a reference number. To view/reprint the transmittal, click on the **VIEW** button.

Reference Number
3618
3616
3614

View

Documents are in Adobe Acrobat format. You must have Adobe Acrobat Reader installed on your system to view or print a document. You may obtain a free copy of Adobe Acrobat Reader from the Adobe website at:
www.adobe.com

Employer contributions

The employer contribution history includes all transmittals submitted either online or on paper. For online submissions, a listing of transmittals appears as described in the previous section when **Contributions** is selected from the **EMPLOYER OPTIONS** menu. Highlight a number and click **View** to view the PDF.

For paper-only submittals, the PDF cannot be viewed. Select **Contributions** from the **EMPLOYER OPTIONS** menu to view the contribution history by **Deposit Dates** or **Work Months**.

EMPLOYER OPTIONS
 Employer Contribution

Search on: Deposit Dates Work Months Period: 01/01/2001 01/01/2012 Enter these dates as MM/DD/YYYY

TEST EMPLOYER

Status	Agreement	Job Class	Start	End	Work Month	Deposit Date	Postmark Date	Document Amount	Check Amount
Closed Invoice	AGR1	JCAA			03/2002	04/04/2002	04/04/2002	1.00	1.00
Closed Invoice	AGR1	JCAA			03/2002	04/04/2002	04/04/2002	250.00	250.00
Closed Invoice	AGR1	JCAA			03/2002	04/04/2002	04/04/2002	500.00	500.00
Closed Invoice	AGR1	JCAA			10/1974	04/29/2002	04/28/2002	500.00	500.00
Closed Invoice	AGR1	JCAA			10/1974	04/29/2002	04/28/2002	250.00	2,000.00
Closed Invoice	AGR1	JCAA			11/1971	04/29/2002	04/28/2002	500.00	2,000.00
Closed Invoice	AGR1	JCAA			12/1999	04/29/2002	04/28/2002	1,000.00	2,000.00
Closed Invoice	AGR1	JCAA			01/2001	04/29/2002	04/28/2002	250.00	2,000.00
Closed Invoice	AGR1	JCAA			10/1974	04/29/2002	04/28/2002	250.00	500.00

* Full names of the highlighted Agreement and Job Class

Agreement: Test Agreement 1
 Job Class: Job Class AA

[View Employer Data](#) ← View employer contact information

Highlight and double-click the **Status** of a transmittal document to see the details. **Previous Screen** returns you to the list of employer contributions.

Employer Contribution

Search on: Deposit Dates Work Months Period: 01/01/2001 01/01/2012 Enter these dates as MM/DD/YYYY

TEST EMPLOYER

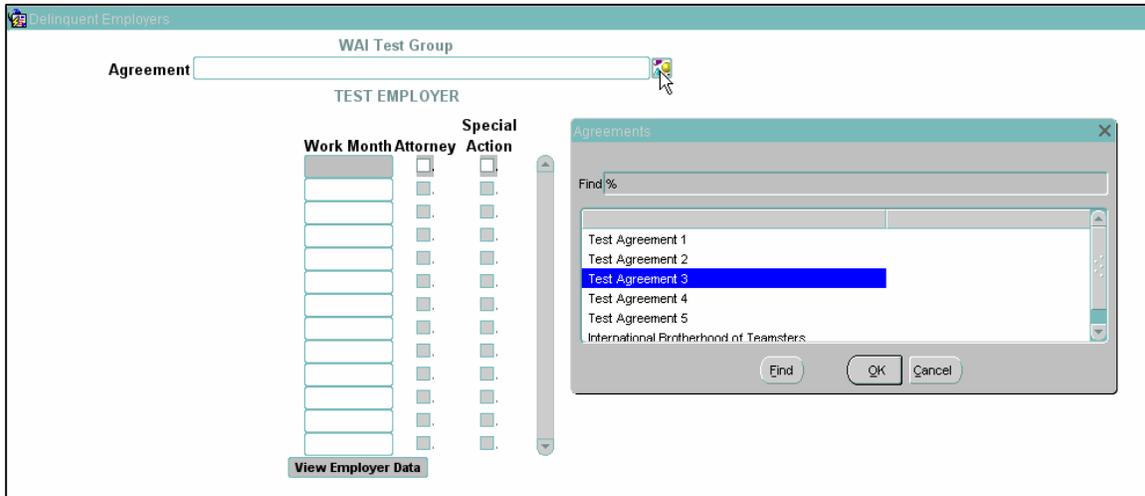
[Previous Screen](#)

	Participant	Base Type	Base Value	Rate	Contribution Amount
123-45-6789	Smith, J	Employer Contrib	25.0000	1.00000	\$25.00
111-11-1111	Doe, John	Employer Contrib	25.0000	1.00000	\$25.00
111-11-1111	Doe, John	Participant (Pre Ta	12.5000	1.00000	\$12.50
123-45-6789	Smith, J	Loan Payments	25.0000	1.00000	\$25.00
111-11-1111	Doe, John	ER Matching Dollar	12.5000	1.00000	\$12.50

Test Group's Annuity Fund

Employer unreported documents

Employers can view current unreported work months online when available, by selecting **Unreported** from the **EMPLOYER OPTIONS** menu. Select the **Agreement** from the LOV.



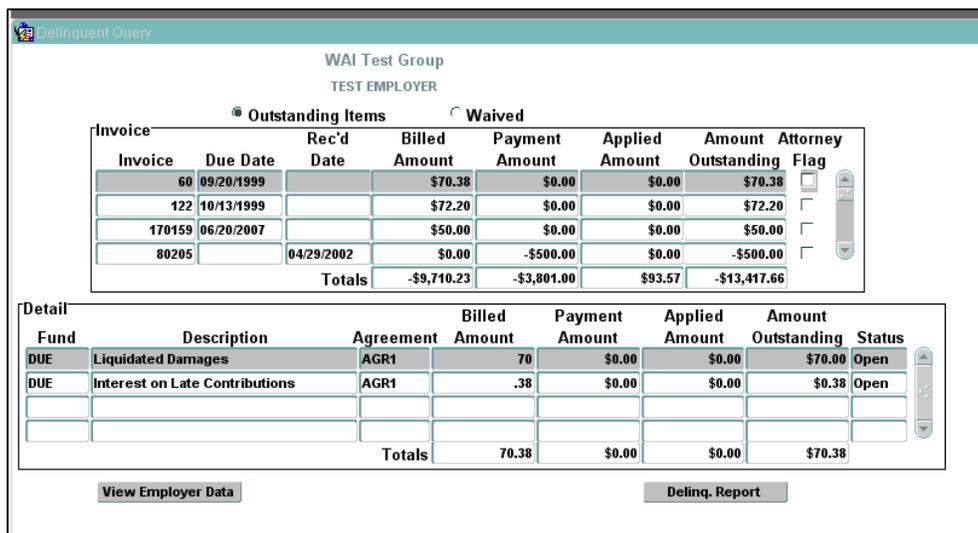
- If **Attorney** is checked, the delinquent items will be turned over to an attorney for collection purposes.
- If **Special Action** is checked, special action is required against this employer.

Click **View Employer Data** to view contact information for the employer. Requests for changes must be reported to the ET Administrator.

Employer delinquent query

The ability to view current delinquent items online enables employers to keep an up-to-date listing of overages, shortages and penalties owed to the fund.

Select **Delinquent** from the **EMPLOYER OPTIONS** menu to open the **Delinquent Query** form.



The **Invoice** block contains the invoice header information and the **Detail** block shows the details for the selected row above.

- Click **View Employer Data** to view contact information for the employer. Requests for changes must be reported to the ET Administrator.
- Click **Delinq. Report** to view the PDF version of the delinquent report.

Employer documents

The **Documents** option opens a list of available PDF documents that can be downloaded and printed. These documents include user guides for ET Web, release notes, and any other PDFs that an employer wishes to make available. Contact the ET administrator for information on adding documents.

Select a document using the up and down arrow keys or the mouse cursor and click **View** to open the PDF in Adobe Acrobat®.

Changing your password

You can change your password at any time. The case-sensitive password must be eight (8) alphanumeric characters (0-9, A-Z, a-z) in length.

Note The password policy for the non-Web version of ET does not match the password policy for the Web version.

Select the **Change Password** option from any ET Web **Options** menu. You need to enter the new password twice and click **Submit**. The change is in effect immediately.