



## EmployerXG Administration Guide

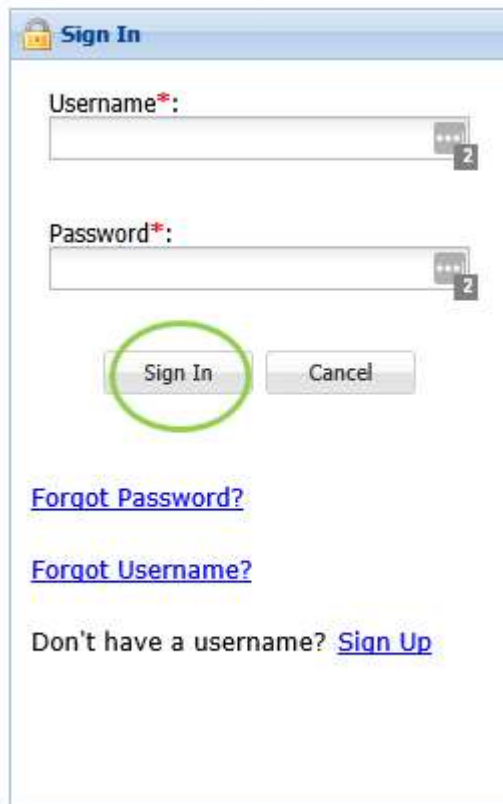
### Editing your Company Contacts and Preferences

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# Sign-In to the employer portal lite

- 1 The URL for the EmployerXG portal is:  
<https://employer.gobasys.com/JIB/Login/Login.aspx>
- 2 You will see the home page and will need to enter your administrator credentials and click the "Sign In" button (see below)



**Sign In**

Username\*:

Password\*:

[Forgot Password?](#)

[Forgot Username?](#)

Don't have a username? [Sign Up](#)

# Add a new employer contact information



**Note:** You must have an administrator role to view the Employer Profile tab, add contacts and assign a specific user role to the contacts, and to change the account status.

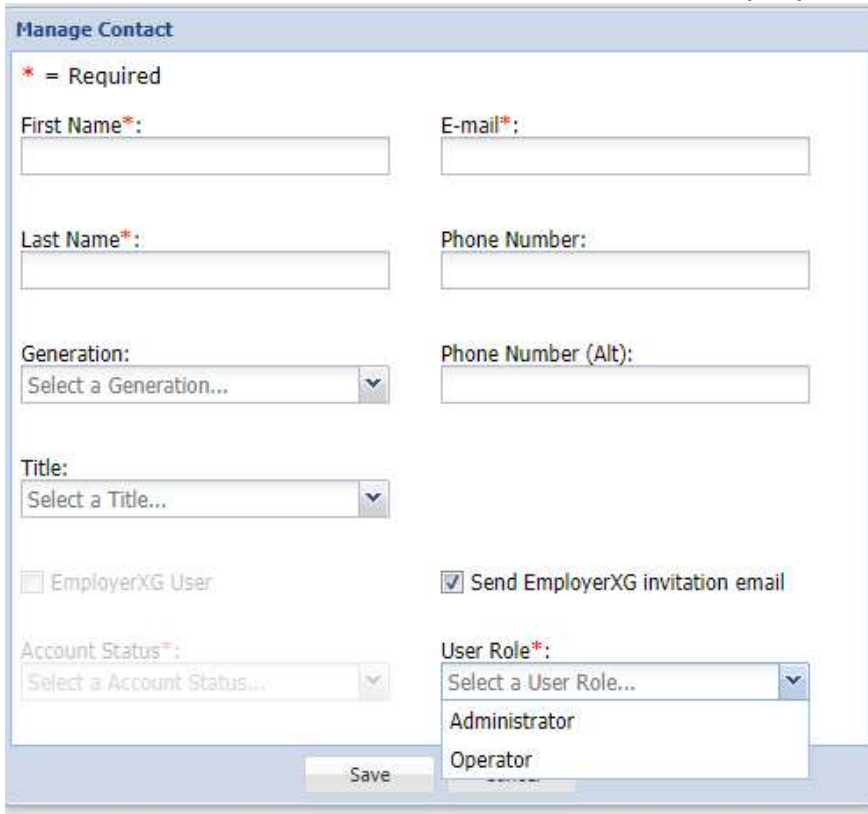
- 1 Click the **Employer Profile** tab.



Employer Contacts								
First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	EmployerXG T
COURTNEY	JOHANSSON	V	LPN	ACCT, ADMIN	ericas@basys.com	11111111...	22222222...	
HERMAN	MUENSTER	III	LPN	ADMIN	ERICAS@BASYS.COM	44323323...		
DOUGLAS	HEFFERNAN			ADMIN	ERICAS@BASYS.COM			
MONIQUE	JONES	III			fakeemail@basys.com	33322222...		
CECILIA	MCCOY					33222233...	33233233...	
MELROY	JENKINS			OPERATOR	ericas@basys.com	44324222...	11111111...	
PETER	BRADY			HISTONLY	ericas@basys.com	44324222...		
SHERLOCK	WATSON			INT1, TAX		22233344...		
DEBERA	LONG			ADMIN	ericas@basys.com	44323323...		
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...		

Page 1 of 3      Displaying contacts 1 - 10 of 25

2 Click . The Manage Contacts window displays:.



There are two user roles.

Types of **User Role**:

- Administrator – Will be able to add/edit other user contacts and enter remittances
- Operator – Will only be able to enter Remittances

3 Enter contact information: the required fields are: First Name, Last Name, User Role and E-mail.



**Important!** If you select Send EmployerXG invitation email, when you save the contact information, the contact is sent an email containing the instructions to begin the sign-up process. Notify the contact to watch for this email since the link expires after 24 hours. If they don't use the link before it expires, you will have to send another email.

4 Click **Save**.

5 The user added will receive the email shown below:

# Edit an existing employer contact information



**Note:** You must have an administrator role to view the Employer Profile tab, add contacts and assign a specific user role to the contacts, and change the account status.

- 1 Click the **Employer Profile** tab.

The screenshot shows a navigation bar with three tabs: Home, Employer Profile (highlighted with a green circle), and Personal Profile. Below the navigation bar is a section titled "Employer Contacts" with "Add", "Edit", and "Delete" icons. A table lists contact information for ten individuals. The table has columns for First Name, Last Name, Generation, Title, Contact Type, Email, Phone #, Alt Phone #, and EmployerXG. The contacts listed are COURTNEY JOHANNSSON, HERMAN MUENSTER, DOUGLAS HEFFERNAN, MONIQUE JONES, CECILIA MCCOY, MELROY JENKINS, PETER BRADY, SHERLOCK WATSON, DEBERA LONG, and HAROLD JENKINS. At the bottom, there is a pagination control showing "Page 1 of 3" and "Displaying contacts 1 - 10 of 25".

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	EmployerXG
COURTNEY	JOHANNSSON	V	LPN	ACCT, ADMIN	ericas@basys.com	11111111...	22222222...	
HERMAN	MUENSTER	III	LPN	ADMIN	ERICAS@BASYS.COM	44323323...		
DOUGLAS	HEFFERNAN			ADMIN	ERICAS@BASYS.COM			
MONIQUE	JONES	III			fakeemail@basys.com	33322222...		
CECILIA	MCCOY					33222233...	33233233...	
MELROY	JENKINS			OPERATOR	ericas@basys.com	44324222...	11111111...	
PETER	BRADY			HISTONLY	ericas@basys.com	44324222...		
SHERLOCK	WATSON			INT1, TAX		22233344...		
DEBERA	LONG			ADMIN	ericas@basys.com	44323323...		
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...		

- 2 Click the employer contact to edit. Click **Edit**.

The screenshot shows the "Manage Contact" form. It includes a legend for required fields (\*). The form has the following fields: First Name\* (text input with "Adam"), E-mail\* (text input with "adam@young.com"), Last Name\* (text input with "Young"), Phone Number (text input), Generation (dropdown menu with "Select a Generation..."), Phone Number (Alt) (text input), Title (dropdown menu with "Select a Title..."), Contact Type (text input), EmployerXG User (checkbox), Send EmployerXG invitation email (checked checkbox), Account Status\* (dropdown menu with "Select a Account Status..."), and User Role\* (dropdown menu with "Select a User Role...", "Administrator", and "Operator" options). A "Save" button is at the bottom.

- 3 Change the contact information as necessary and click **Save**.
- 4 When the Manage Contact confirmation message displays, click **OK**.

# Delete an existing employer contact



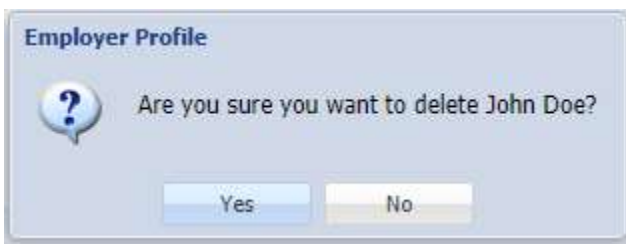
**Note:** You must have an administrator role to view the Employer Profile tab, add contacts and assign a specific user role to the contacts, and to change the account status.



1. Select the `Employer Profile` tab.

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	EmployerXG
COURTNEY	JOHANSSON	V	LPN	ACCT, ADMIN	ericas@basys.com	11111111...	22222222...	
HERMAN	MUENSTER	III	LPN	ADMIN	ERICAS@BASYS.COM	44323323...		
DOUGLAS	HEFFERNAN			ADMIN	ERICAS@BASYS.COM			
MONIQUE	JONES	III			fakeemail@basys.com	33322222...		
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DEBERA	LONG			ADMIN	ericas@basys.com	44323323...		
HAROLD	JENKINS			ADMIN, ACCT	ericas@basys.com	71722227...		

2. Click the contact to delete.
3. Click `Delete`.
4. Click `Yes` on the button, as shown below



5. Click `OK` in the deletion confirmation message.

# Set your Preferences

Sets default settings to improve your remittance submission experience.

1. Click the Employer Profile tab to access employer preferences.



2. From the Employer Profile page, click [Your Preferences](#).



### Your Preferences

\* = Required

Copy Remittance Options\*:  
Employee ID, Name, and Quantities

Default Group\*:  
JOINT INDUSTRY BOARD

Remittance Processed Alert\*:  
Primary Contact

Save Cancel



3. Copy Remittance option.

- Choose what displays on the menu when you copy a remittance from the Copy Remittance Options list.
  - Depending on the selected Copy Remittance Options and if the associated remittances' contracts match, the ID, Name, and Quantities, or just the ID and Name are copied.
  - If the contracts associated with the remittance don't match, only the ID and Name are copied.

4. Remittance group option:

- Do not change this option. This should remain JOINT INDUSTRY BOARD.

5. Remittance Processed Alerts:

- Choose the user category to send alerts from the Remittance Processed Alert list. See options below:

The screenshot shows a 'Your Preferences' dialog box with the following settings:

- \* = Required**
- Copy Remittance Options\*:** Employee ID, Name, and Quantities
- Default Group\*:** JOINT INDUSTRY BOARD
- Remittance Processed Alert\*:** Primary Contact (selected from a dropdown menu that also lists Primary Contact, Employer Administrators, and All Portal Users)

Buttons for 'Save' and 'Cancel' are located at the bottom of the dialog.

- Those users will receive an email when a remittance is submitted

6. Click **save** to update the profile.