

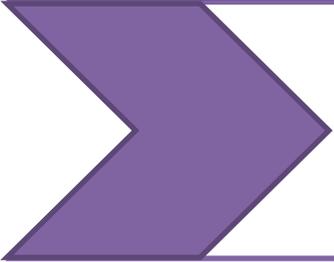


ESS Security Administration



March 2018

AGENDA



ESS Security Roles and Definitions



ESS Security Administration Rules



ESS Security Administration
Overview

Security Administration Roles

1. Employer Administrator
2. Full Access Except User Management
3. Employer Payor
4. Employer HR
5. Employer Invoice Processor
6. Employer Processor

Security Role Definition

1. Employer Administrator (No security barrier)

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Account
- Employer Information
- Notify Us
- Reports:
 - Invoice Details 32BJ Funds Reports
 - Participant Roster Change Report
 - Invoice Details 32BJ Union Reports
 - Employer ACA1095C Detail Report

Security Role Definition

2. Full Access Except User Management

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
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Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration (Read Only)
- Account
- Employer Information
- Notify Us
- Reports:
 - Invoice Details 32BJ Funds Reports
 - Participant Roster Change Report
 - Invoice Details 32BJ Union Reports
 - Employer ACA1095C Detail Report

Security Role Definition

3. Employer Payor

Shortcuts

- Help and Support

Menu

- Home
- Payment Processing
- Transactions
- Employer Administration (Read Only)
- Notify Us
- Reports:
 - Invoice Details 32BJ Funds Reports
 - Invoice Details 32BJ Union Reports
 - Employer ACA1095C Detail Report

Security Role Definition

4. Employer HR

Shortcuts

- Process New Hire
- Help and Support

Menu

- Home
- Roster
- Notify Us
- Reports:
 - Participant Roster Change Report
 - Employer ACA1095C Detail Report

Security Role Definition

5. Employer Invoice Processor

Shortcuts

- Create Invoice
- Upload a File
- Help and Support

Menu

- Home
- Invoices
- Transactions
- Uploaded Files
- Account
- Notify Us
- Reports:
 - Invoice Details 32BJ Funds Reports
 - Invoice Details 32BJ Union Reports
 - Employer ACA1095C Detail Report

Security Role Definition

6. Employer Processor

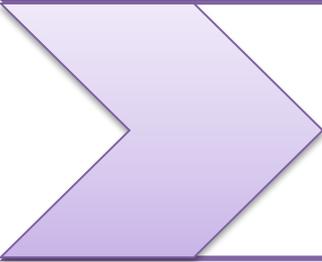
Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

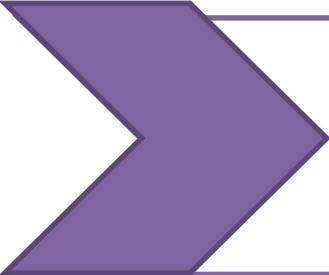
Menu

- Home
- Roster
- Invoices
- Transactions
- Uploaded Files
- Account
- Notify Us
- Reports:
 - Invoice Details 32BJ Funds Reports
 - Participant Roster Change Report
 - Invoice Details 32BJ Union Reports
 - Employer ACA1095C Detail Report

AGENDA



ESS Security Roles and Definitions



ESS Security Administration Rules



ESS Security Administration
Overview

ESS Security Administration Rules

- User name is system generated
- Password is required (minimum 6 characters)
- E-mail is required
- User is limited to select only one security role

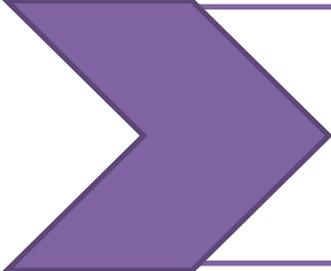
AGENDA



ESS Security Roles and Definitions



ESS Security Administration Rules



**ESS Security Administration
Overview**



25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Home

News

Alerts

Filter Export

Account Name	Work Location Name	Account Number	Balance	Actions
XYZ Employer-123 Account-NYC Apartment Building RAB	123 Account	19612	\$0.00	Transactions Profile

Showing Records 1 - 1 of 1

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Employer Administration

This page allows you to add, delete, and update contacts.

Manage PCX Accounts

[Manage PCX Accounts](#)

Employer Contacts

[Add](#)[Filter](#) [Print](#) [Export](#)

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
-----------	------	--------	------	--------	------------	-------	--------

Account Contacts

Account: [Add](#)[Filter](#) [Print](#) [Export](#)

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
-----------	------	--------	------	--------	------------	-------	--------

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

-  Create Invoice
-  Process New Hire
-  Upload a File
-  Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Add Employer Contact

Please enter the name or SSN of the person that will be responsible for the security user account that you are creating. If you would like to create a new user, please click [here](#).

Select Person

Other - Person:

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions

Uploaded Files

Employer Administration

- Accounts
- Employer Information
- Contact Us
- Reports

All fields are required. The password is case sensitive.

New User

User Name:

Password:

Confirm Password:

Reset Password Flag:

Lock Account:

Account Active:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth:

Gender: Male Female

Person ID:

Security Role

Employer Self Service

Role

* Universal Group

Address Information**Primary Address**

Address 1:

Address 2:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Password cannot be less than 6 characters

All fields are required. The password is case sensitive.

New User

User Name:

Password:

Confirm Password:

Reset Password Flag:

Lock Account:

Account Active:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth:

Gender: Male Female

Person ID:

Security Role

Role

Address Information**Primary Address**

Address 1:

Address 2:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Please select the appropriate Security Role for this user.

All fields are required. The password is case sensitive.

New User

User Name:

Password:

Confirm Password:

Reset Password Flag:

Lock Account:

Account Active:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth:

Gender: Male Female

Person ID:

Address Information**Primary Address**

Address 1:

Address 2:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

Security Role

Employer Self Service

Role

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

-  Create Invoice
-  Process New Hire
-  Upload a File
-  Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

All fields are required. The password is case sensitive.

New User

User Name:

Password:

Confirm Password:

Reset Password Flag:

Lock Account:

Account Active:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth: 

Gender: Male Female

Person ID:

Address Information

Primary Address

Address 1:

Address 2:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

S

- Employer Administrator - Employer User
- Employer Full Access Except User Management - Employer User
- Employer HR - Employer User
- Employer Invoice Processor - Employer User
- Employer Payor - Employer User
- Employer Processor - Employer User

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
 - Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

All fields are required. The password is case sensitive.

New User

User Name:

Password:

Confirm Password:

Reset Password Flag:

Lock Account:

Account Active:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth:

Gender: Male Female

Person ID:

Security Role

Employer Self Service

Role

* Universal Group

Address Information**Primary Address**

Address 1:

Address 2:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Employer Administration

This page allows you to add, delete, and update contacts.

Manage PCX Accounts

[Manage PCX Accounts](#)

Employer Contacts

[Add](#)[Filter](#) [Print](#) [Export](#)

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
JLOPEZ1	LOPEZ, JOSE	Active		Male		Jlopez@XYZEmployer.com	Edit Delete

Account Contacts

Account: 19612 XYZ Employer-123 Account-NYC Apartment Building RAB

[Add](#)[Filter](#) [Print](#) [Export](#)

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
-----------	------	--------	------	--------	------------	-------	--------

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

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JLOPEZ1	LOPEZ, JOSE	Active		Male		Jlopez@XYZEmployer.com	Edit Delete

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Account: 19612 XYZ Employer-123 Account-NYC Apartment Building RAB

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User Name	Name	Status	Role	Gender	Work Phone	Email	Action
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25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

User Administration

Below are the details for the selected user. To edit the user details, security groups or user address, please click on 'Edit' button.

User Details

User Name: JLOPEZ1
Reset Password Flag:
Lock Account:

Title: Mr.
Role:
SSN:
First Name: Jose
Middle Name:
Last Name: Lopez
Suffix:
Date of Birth:
Gender: Male

Address Information

NY US
Email: Jlopez@XYZEmployer.com

Security Role

 Print  Export

Role
Employer Administrator - Employer User *

* Universal Group

Back

Edit



25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

User Administration**User Details**

User Name:

Password: (Change) 

Reset Password Flag:

Lock Account:

Account Active:

User Type:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth: 

Gender: Male Female

Person ID:

Security Role**Address Information****Primary Address**

Address 1:

Address 2:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

Account Active:

User Type:

Title:

Role:

SSN:

First Name:

Middle Name:

Last Name:

Suffix:

Date of Birth:

Gender: Male Female

Person ID:

Address 3:

City:

Zip:

State:

County:

Country:

Contact Info

Work Phone:

Home Phone:

Cell Phone:

Fax:

Email:

Web Address:

Security Role

Print Export

Role
Employer Administrator - Employer User *

** Universal Group*

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

-  Create Invoice
-  Process New Hire
-  Upload a File
-  Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

 The user information has been updated.

User Administration

Below are the details for the selected user. To edit the user details, security groups or user address, please click on 'Edit' button.

User Details

User Name: JLOPEZ1
Reset Password Flag:
Lock Account:

Title: Mr.
Role:
SSN:
First Name: Jose
Middle Name:
Last Name: Lopez
Suffix:
Date of Birth:
Gender: Male

Address Information

NY US
Email: Jlopez@XYZEmployer.com

Security Role

 Print  Export

Role
Employer Administrator - Employer User *

* Universal Group

[Back](#)[Edit](#)

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

- Create Invoice
- Process New Hire
- Upload a File
- Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration**
- Accounts
- Employer Information
- Contact Us
- Reports

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[Add](#)[Filter](#) [Print](#) [Export](#)

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
JLOPEZ1	LOPEZ, JOSE	Active		Male		Jlopez@XYZEmployer.com	Edit Delete



Account Contacts

Account: 19612 XYZ Employer-123 Account-NYC Apartment Building RAB

[Add](#)[Filter](#) [Print](#) [Export](#)

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
-----------	------	--------	------	--------	------------	-------	--------

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-  Create Invoice
-  Process New Hire
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-  Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information
- Contact Us
- Reports

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This page allows you to add, delete, and update contacts.

Manage PCX Accounts

Manage PCX Accounts

You are about to delete this record.
Are you sure?

OK
Cancel

Employer Contacts

Add

 Filter  Print  Export

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
JLOPEZ1	LOPEZ, JOSE	Active		Male		Jlopez@XYZEmployer.com	Edit Delete

Account Contacts

Account: 19612 XYZ Employer-123 Account-NYC Apartment Building RAB ▼

Add

 Filter  Print  Export

User Name	Name	Status	Role	Gender	Work Phone	Email	Action
-----------	------	--------	------	--------	------------	-------	--------

25170 - XYZ Employer

Welcome Tatiana Torres 04/29/2013

Shortcuts

-  Create Invoice
-  Process New Hire
-  Upload a File
-  Help and Support

Menu

- Home
- Roster
- Invoices
- Payment Processing
- Transactions
- Uploaded Files
- Employer Administration
- Accounts
- Employer Information**
- Contact Us
- Reports

Employer Information

Demographics

Employer #: 25170

Employer Name: XYZ Employer

Federal Tax No: 12-3456789



Address

25 W 18TH ST

NEW YORK, NY US 10011-4677



Contacts

 Filter  Print  Export

Other Party Name	Role	Gender	Work Phone	Email	Action
Lopez, Jose		Male		Jlopez@XYZEmployer.com	Edit Delete

Showing Records 1 - 1 of 1



