Employer Portal Guide

The Employer Portal Guide provides guidance on **UNITE HERE HEALTH's** web portal for employers, including reporting, payments, messaging, updating employee information, and statements.

Table of Contents

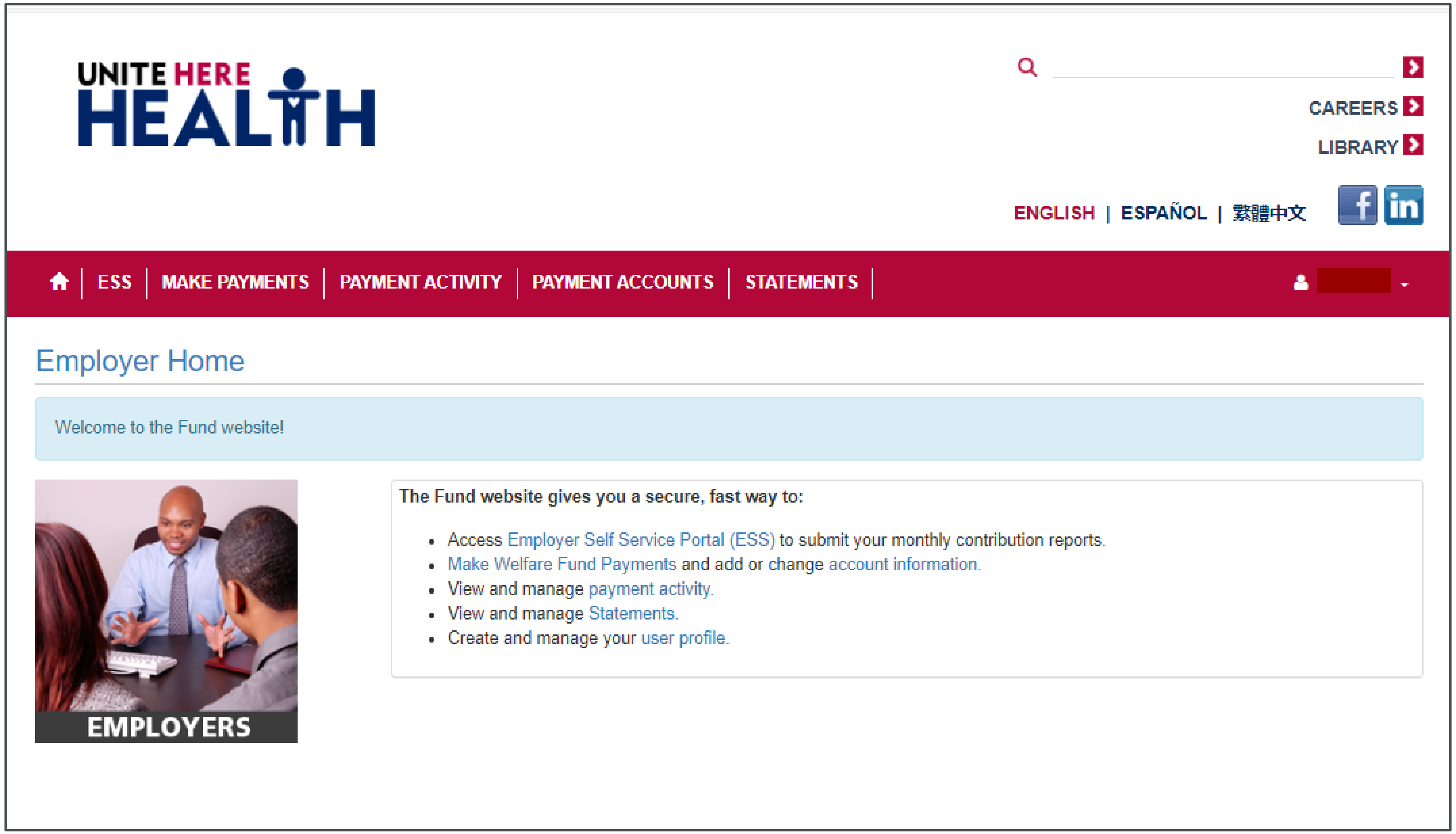
Welcome to UNITE HERE HEALTH!

www.uhh.org

Employer Home

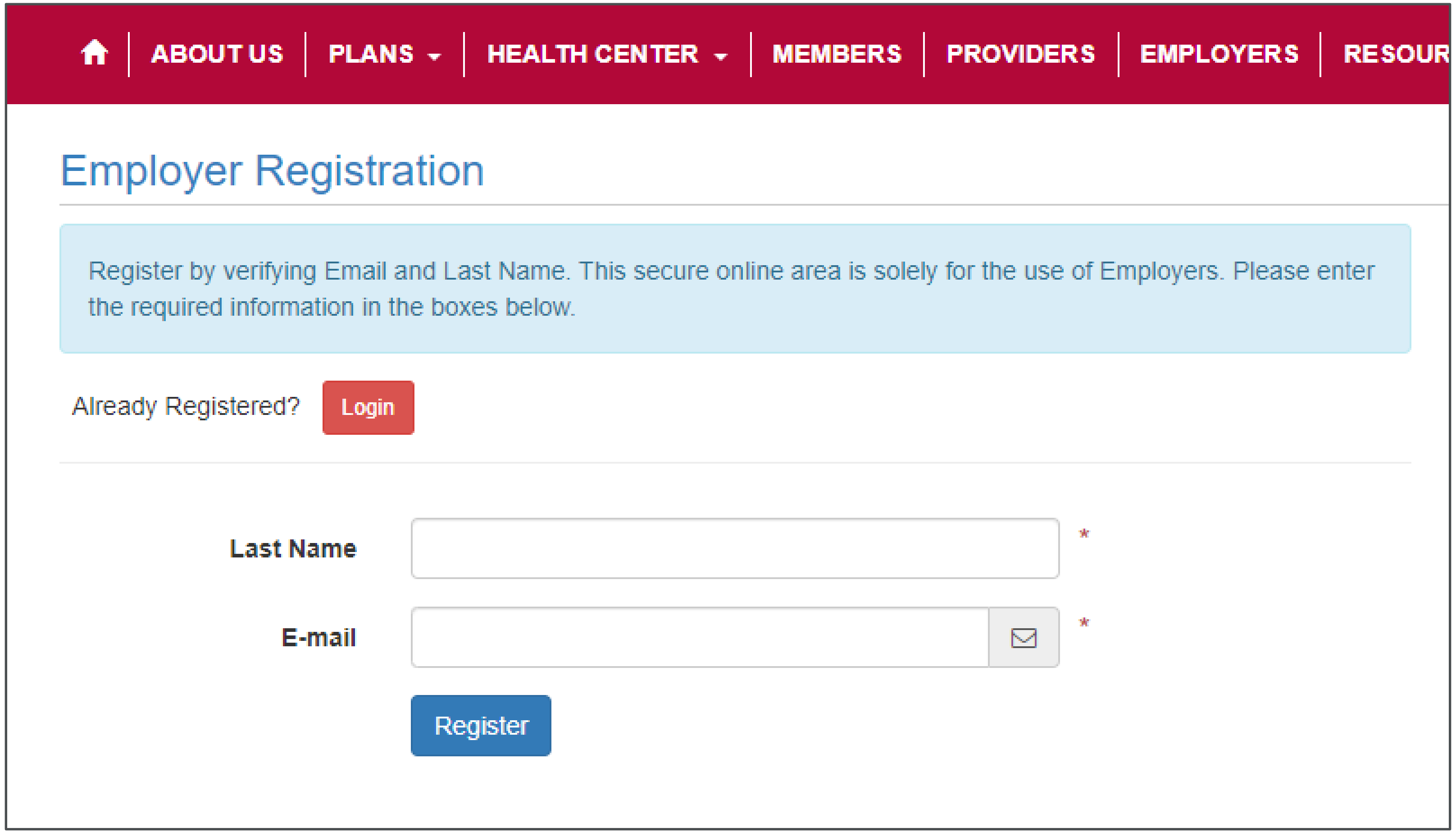
The Fund website gives you a secure, fast way to:

- Access the ***Employer Self-Service Portal (ESS)*** to submit monthly contribution reports
- ***Make Payments*** and add or change account info
- View/manage ***payment activity***
- View/manage ***statements***
- Create/manage your ***user profile***



Employer Registration

1. Go to **www.uhh.org**
2. Select **Employers**
3. Select **New User**
4. Enter your **Last Name**
5. Enter your **E-mail**
6. Click **Register**



Logging Into Your Account

1. Go to **www.uhh.org**

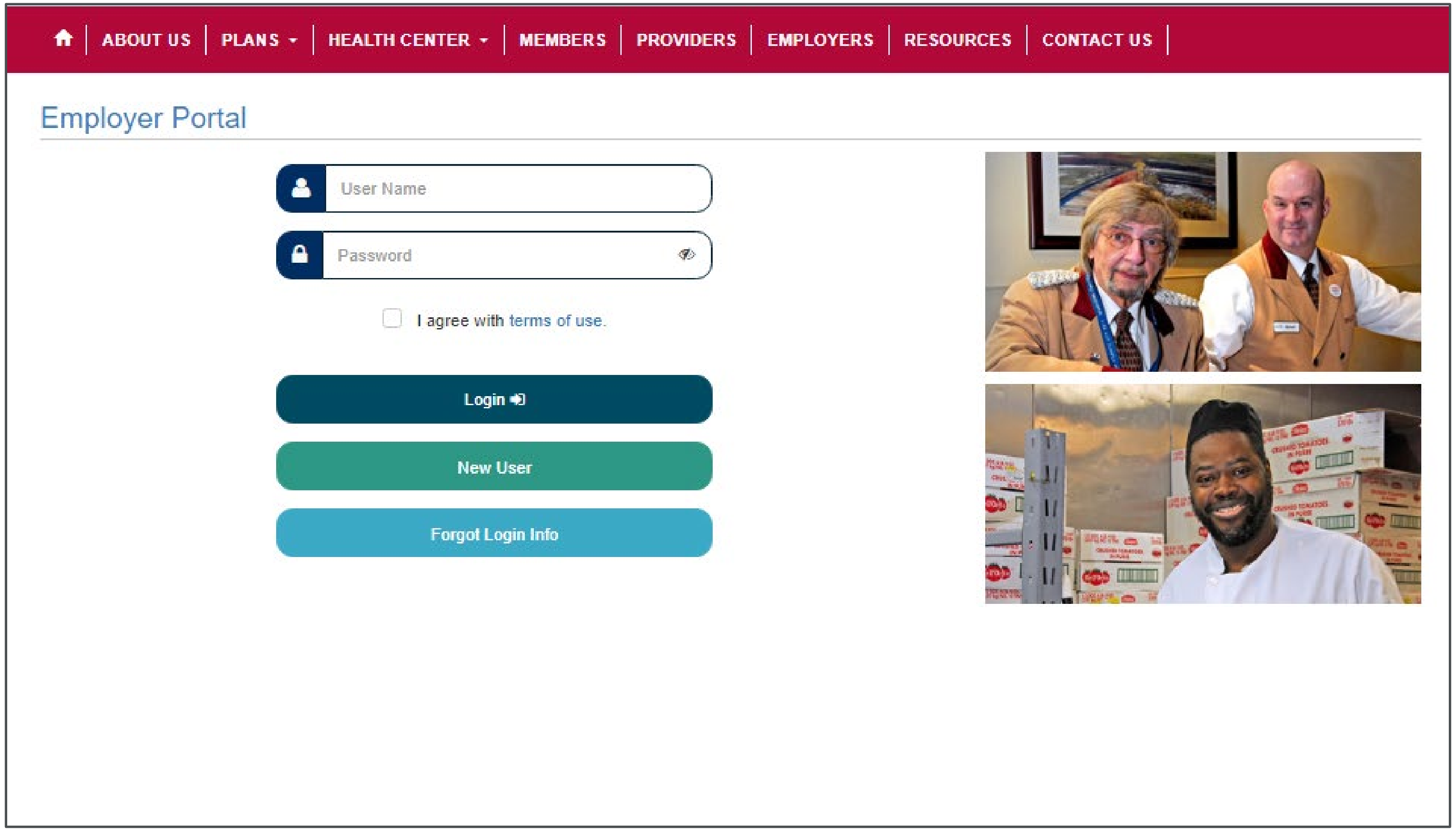
2. Select **Employers**

3. Enter your **User Name**

4. Enter your **Password**

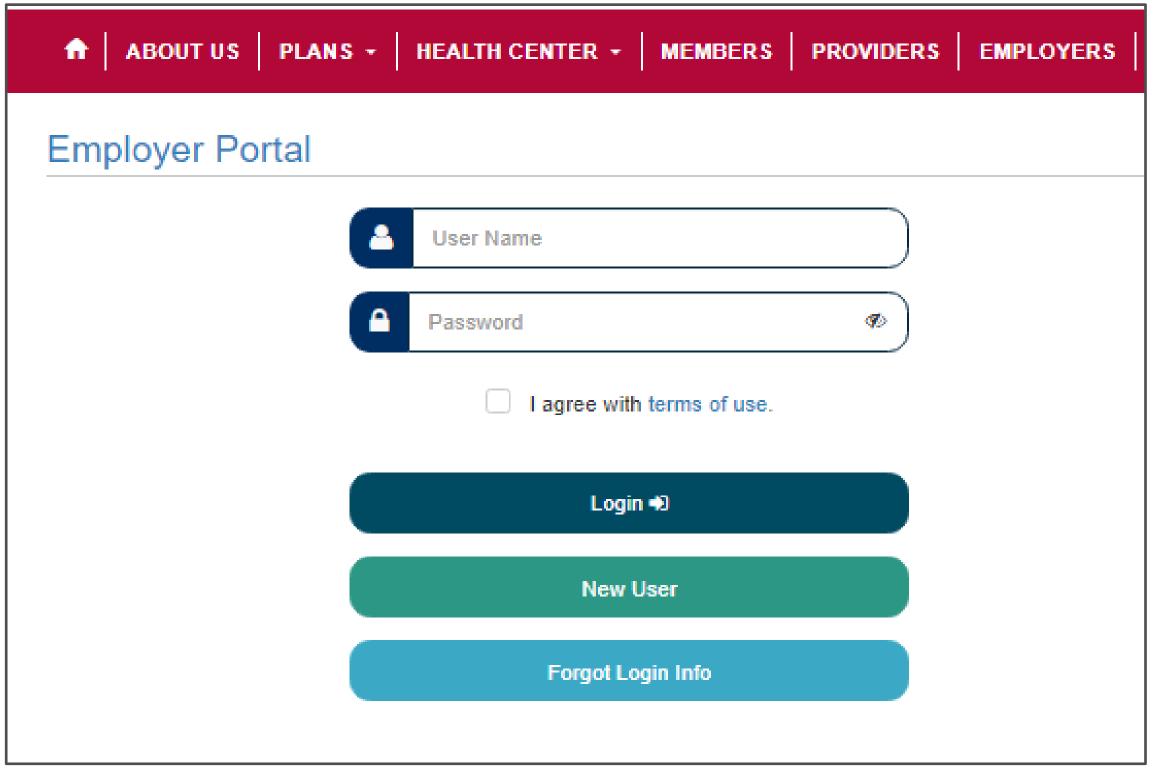
5. Agree to the **Terms of Use**

6. Click **Login**

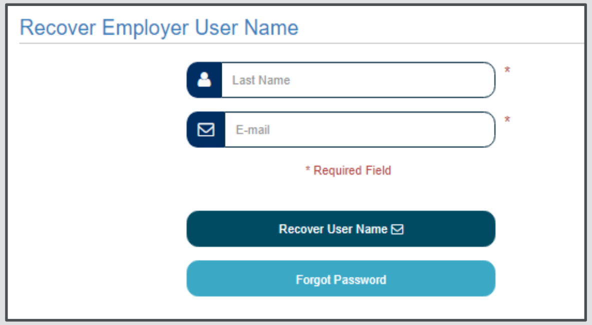


Forgot Login Info?

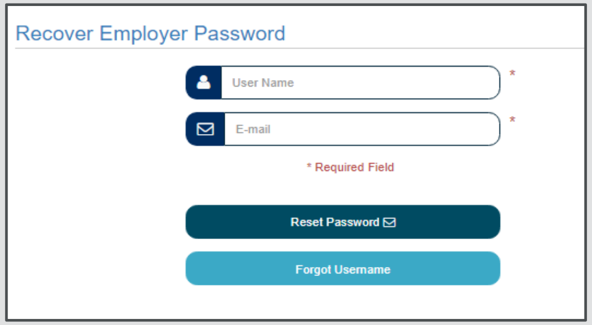
Go to the ESS, and click ***Forgot Login Info*** at the bottom of the page



If you forgot your User name: Enter your Last Name and email and click ***Recover User Name***

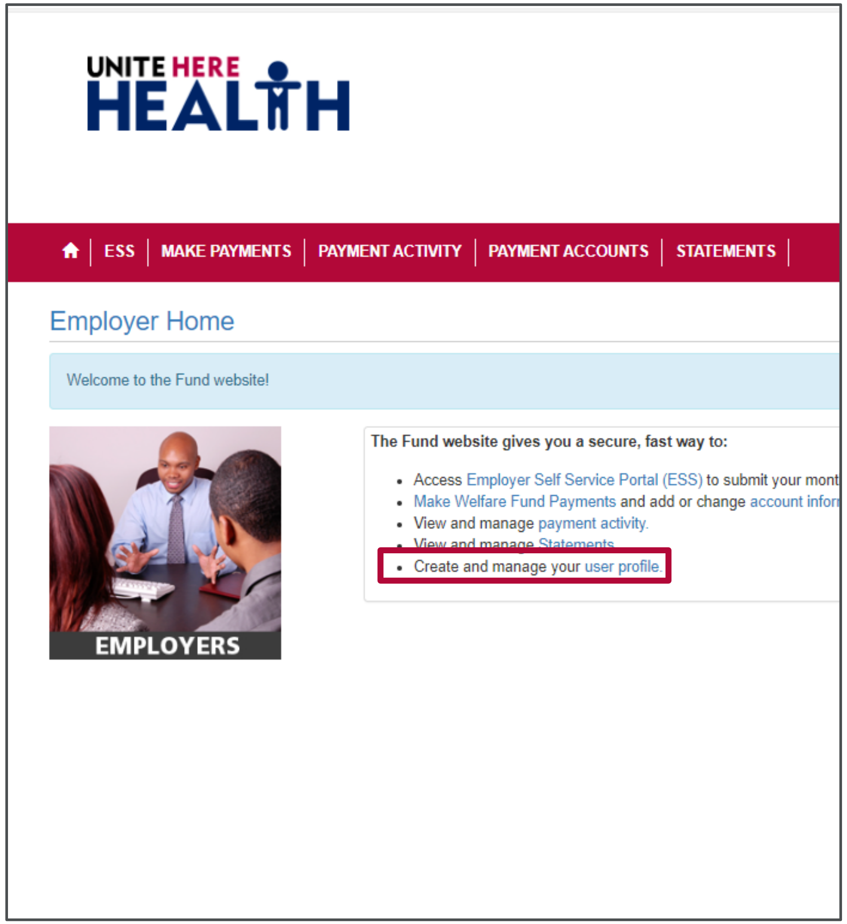


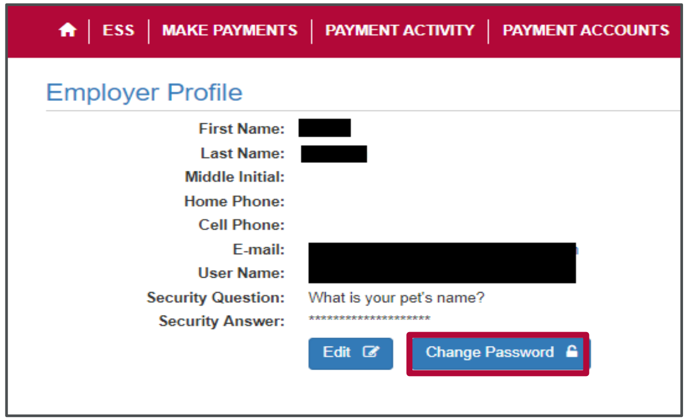
If you forgot your Password: Enter User name and email and click ***Reset Password***

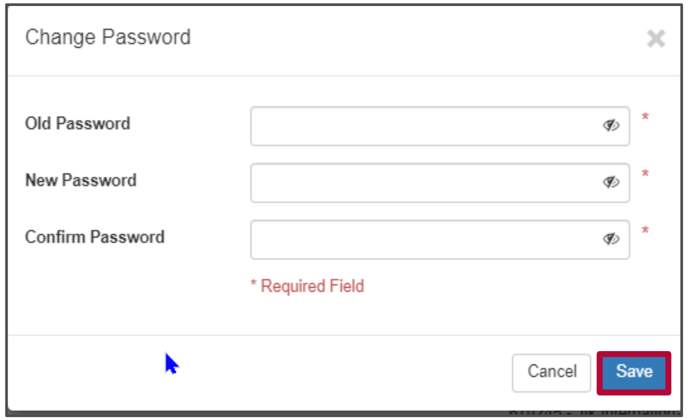


Changing Your Password

1. Click **User Profile**
2. Select **Change Password**
3. Enter **Old Password**
4. Create **New Password**
5. Confirm **New Password**
6. **Save**







Reporting Requirements

Monthly Work Reports and contributions are due on the 15th of the month.

You must submit payments and reports in the requested format. If you don't, the report will be late and subject to these penalties.

Interest and Liquidated Damages: If we don't receive your payment by the 15th of the month, interest and liquidated damages start accruing. They'll accrue at a rate of **Prime + 2%** per annum. This starts on the due date and will continue for each succeeding day of delinquency, until your payment is received.

Late Fee: If you submit your Work Report late more than three (3) times in a calendar year, you'll be charged a one-time late fee. The late fee is **5%** of your (employer) contributions in the previous 12 months.

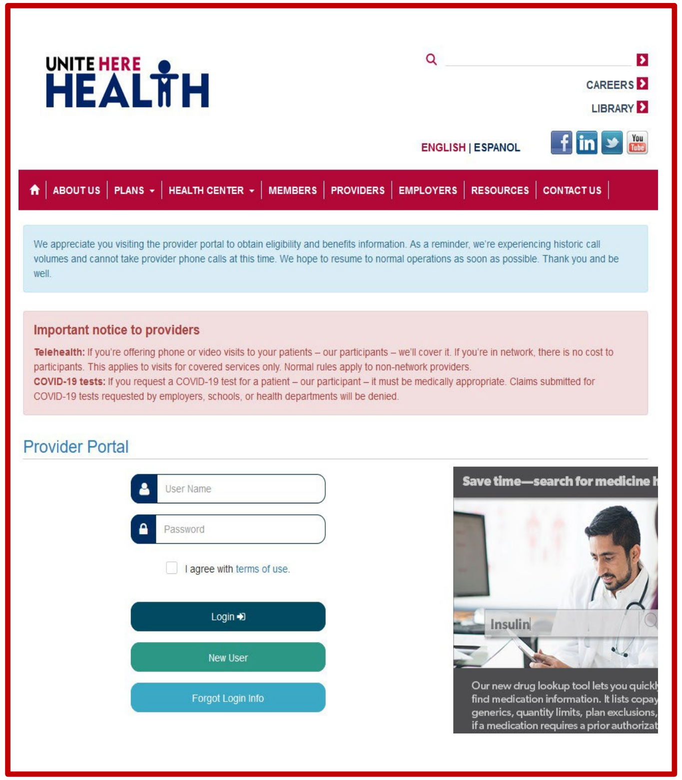
Non-Reported Participants: You must submit a Work Report every month. All employees under a covered job classification must be included in this report. If we find non-reported participants during a payroll audit, you may have interest and audit costs in addition to your monthly contribution.

Employer Self-Service Portal (ESS)

Our online ***Employer Self-Service Portal (ESS)*** provides the tools you need to fully manage your account. From the ESS portal, you can securely submit your monthly Work Reports, make payments, manage new hires and terminations, access previous monthly reporting, and calculate your contribution payment amount.

Best of all, it automatically notifies your Account Representative whenever you submit anything.

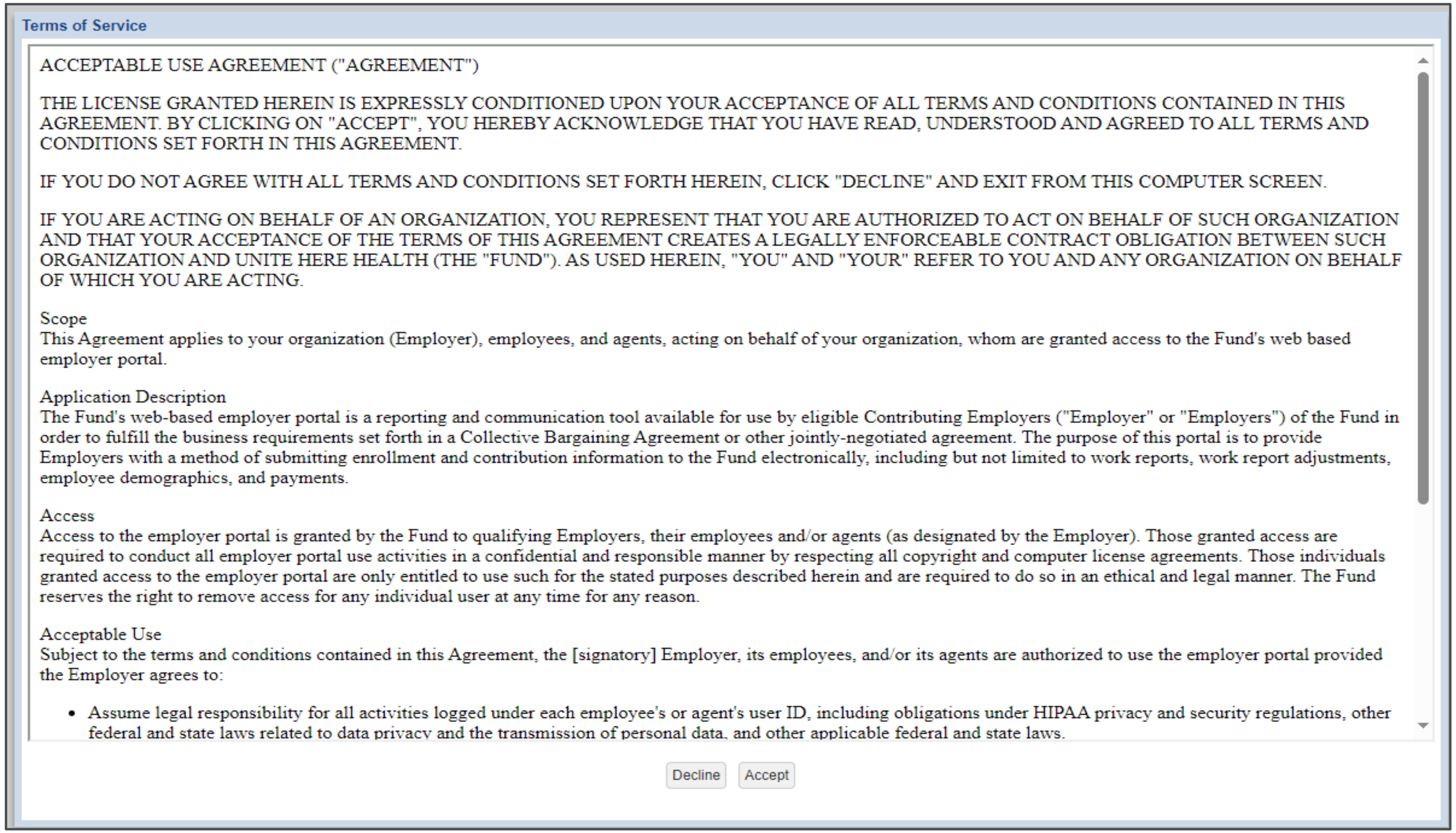
For the best experience, use Chrome or Firefox.



Terms of Service

To proceed, you must read the terms of the ***Acceptable Use Agreement.***

Once you've read the terms, click ***Accept.***



Terms of Service

ACCEPTABLE USE AGREEMENT ("AGREEMENT")

THE LICENSE GRANTED HEREIN IS EXPRESSLY CONDITIONED UPON YOUR ACCEPTANCE OF ALL TERMS AND CONDITIONS CONTAINED IN THIS AGREEMENT. BY CLICKING ON "ACCEPT", YOU HEREBY ACKNOWLEDGE THAT YOU HAVE READ, UNDERSTOOD AND AGREED TO ALL TERMS AND CONDITIONS SET FORTH IN THIS AGREEMENT.

IF YOU DO NOT AGREE WITH ALL TERMS AND CONDITIONS SET FORTH HEREIN, CLICK "DECLINE" AND EXIT FROM THIS COMPUTER SCREEN.

IF YOU ARE ACTING ON BEHALF OF AN ORGANIZATION, YOU REPRESENT THAT YOU ARE AUTHORIZED TO ACT ON BEHALF OF SUCH ORGANIZATION AND THAT YOUR ACCEPTANCE OF THE TERMS OF THIS AGREEMENT CREATES A LEGALLY ENFORCEABLE CONTRACT OBLIGATION BETWEEN SUCH ORGANIZATION AND UNITE HERE HEALTH (THE "FUND"). AS USED HEREIN, "YOU" AND "YOUR" REFER TO YOU AND ANY ORGANIZATION ON BEHALF OF WHICH YOU ARE ACTING.

Scope
This Agreement applies to your organization (Employer), employees, and agents, acting on behalf of your organization, whom are granted access to the Fund's web based employer portal.

Application Description
The Fund's web-based employer portal is a reporting and communication tool available for use by eligible Contributing Employers ("Employer" or "Employers") of the Fund in order to fulfill the business requirements set forth in a Collective Bargaining Agreement or other jointly-negotiated agreement. The purpose of this portal is to provide Employers with a method of submitting enrollment and contribution information to the Fund electronically, including but not limited to work reports, work report adjustments, employee demographics, and payments.

Access
Access to the employer portal is granted by the Fund to qualifying Employers, their employees and/or agents (as designated by the Employer). Those granted access are required to conduct all employer portal use activities in a confidential and responsible manner by respecting all copyright and computer license agreements. Those individuals granted access to the employer portal are only entitled to use such for the stated purposes described herein and are required to do so in an ethical and legal manner. The Fund reserves the right to remove access for any individual user at any time for any reason.

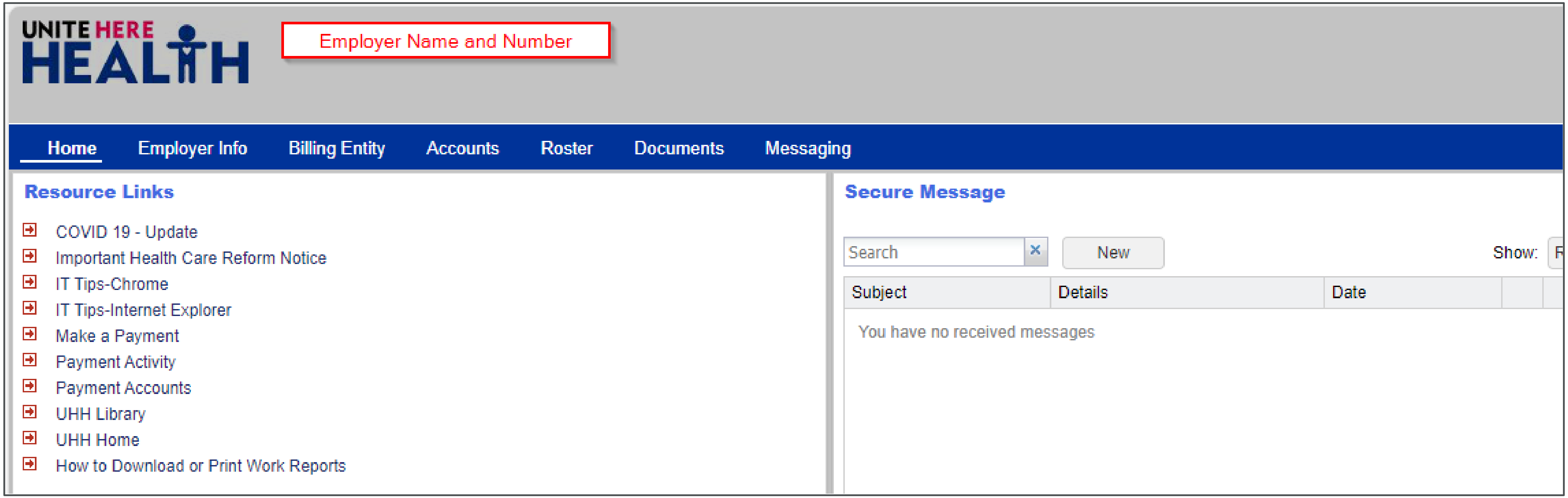
Acceptable Use
Subject to the terms and conditions contained in this Agreement, the [signatory] Employer, its employees, and/or its agents are authorized to use the employer portal provided the Employer agrees to:

- Assume legal responsibility for all activities logged under each employee's or agent's user ID, including obligations under HIPAA privacy and security regulations, other federal and state laws related to data privacy and the transmission of personal data, and other applicable federal and state laws.

Decline Accept

ESS: Home—Employer Dashboard

- Contains ***Resource Links***
- Displays ***Secure Messages***
- Frequently Asked Questions, Employer Statistics, and News *(currently not in use)*

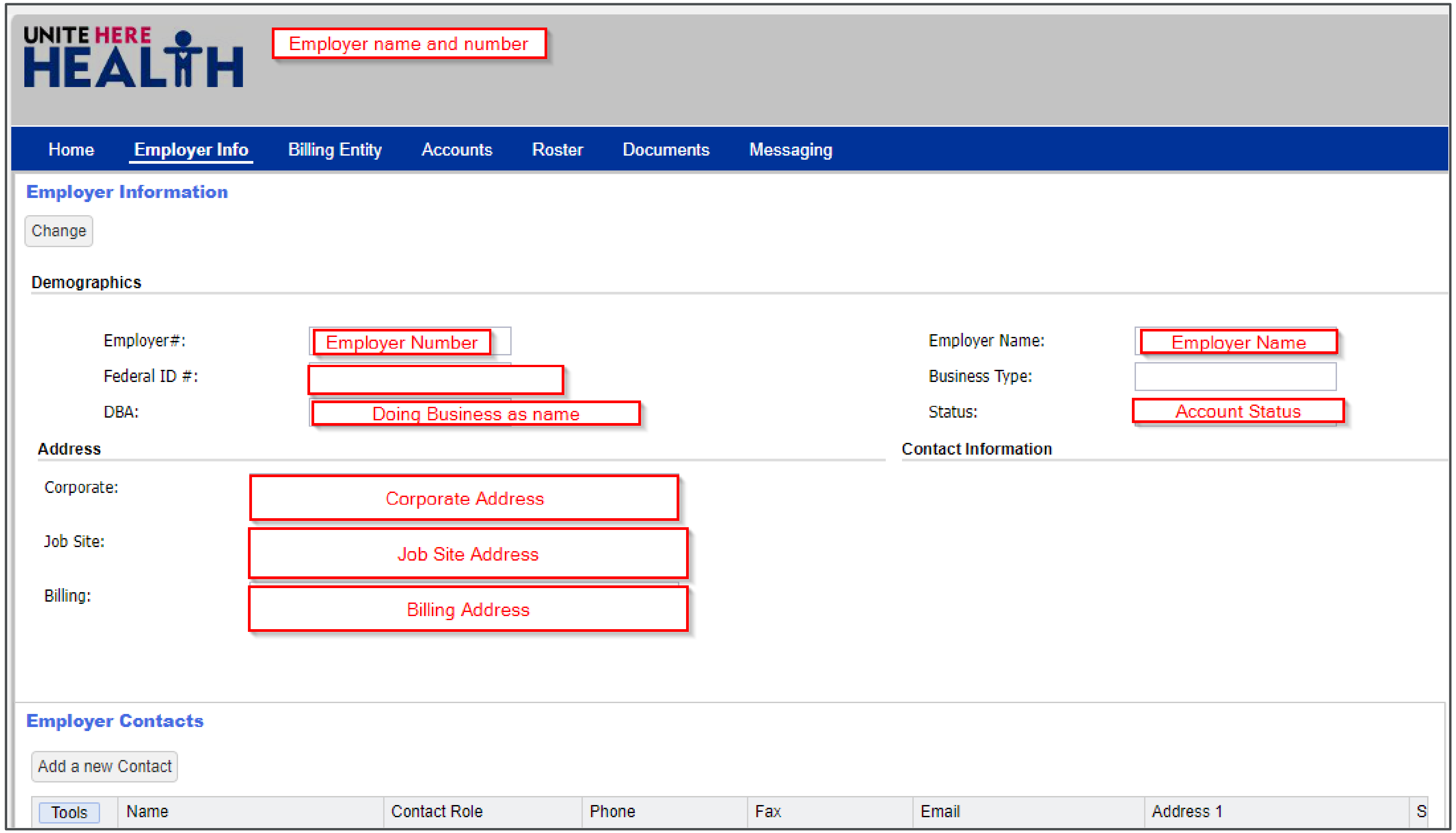


ESS: Employer Info

The ***Employer Info*** page displays basic information about you—the employer—including:

- Employer name and ID number
- Address and phone number
- Contacts

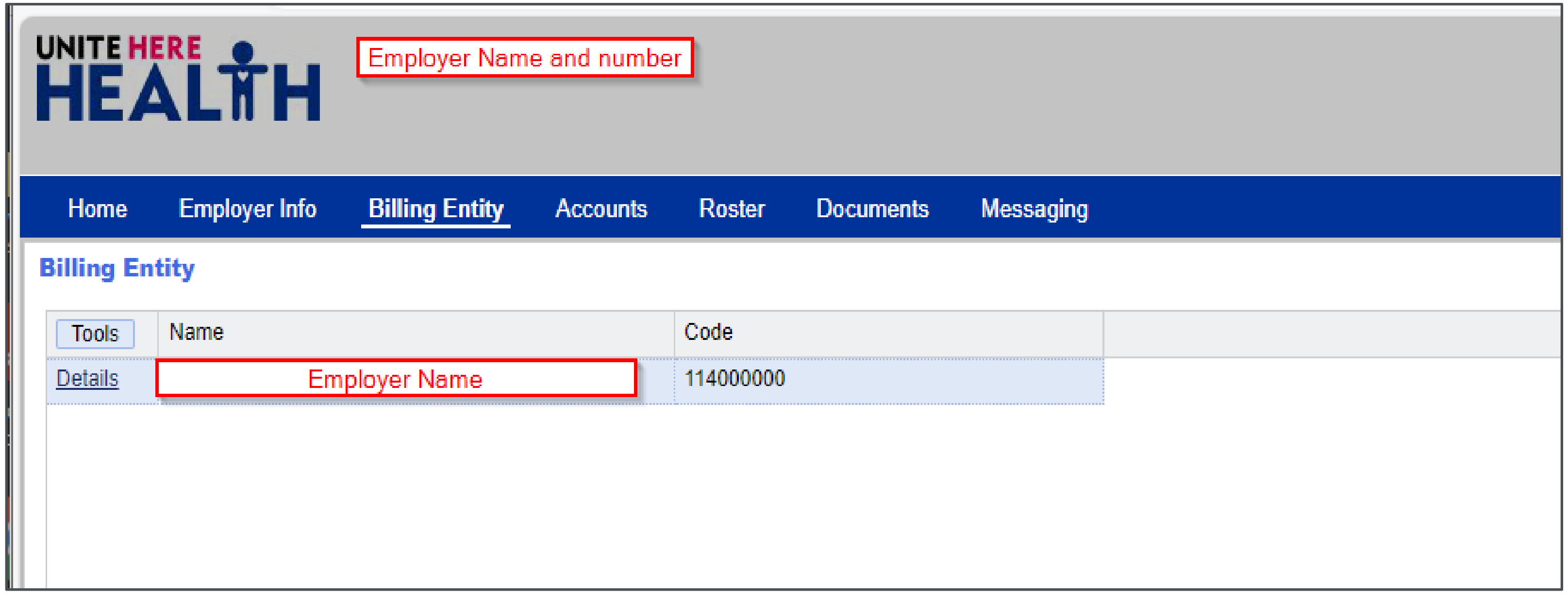
Please contact your UHH Account Representative to update this information.



ESS: Billing Entity

The ***Billing Entity*** page lists all your billing entities.

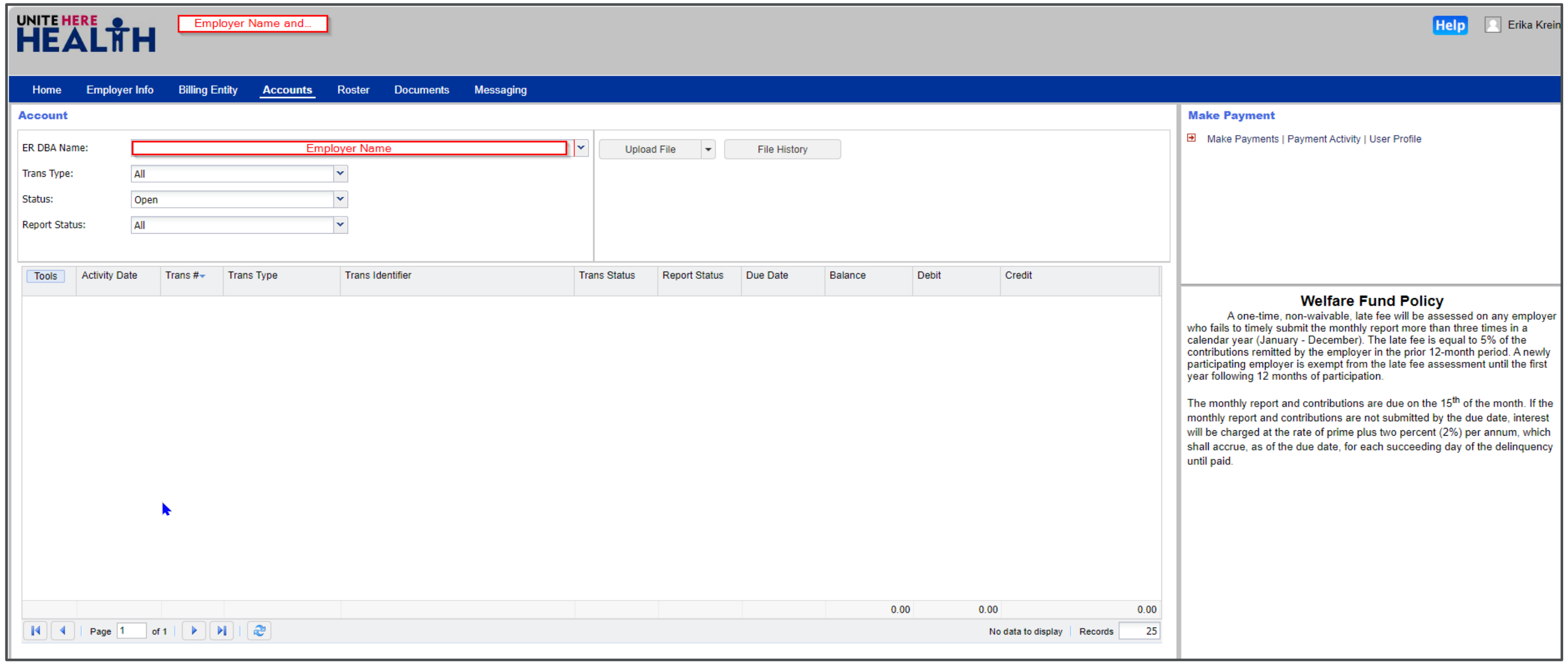
- Click on the ***Details*** link to access basic information for the billing location.
- Afterward, click ***Back*** to return to the list of billing entities.



ESS: Accounts

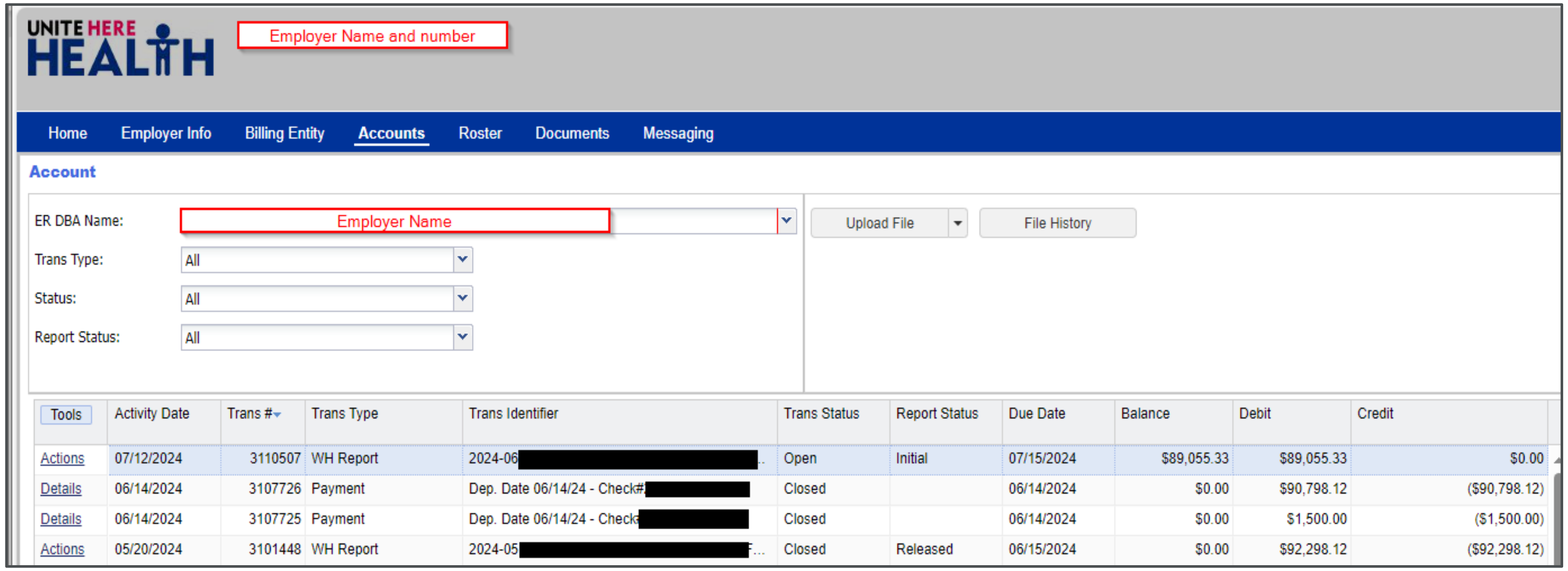
On the ***Accounts*** page, you can:

- Upload a File
- View File History
- Create a Work Report
- Access a Work Report
- Edit a Work Report
- Submit a Work Report
- Adjust a Work Report



ESS: Accounts—Transaction History

The ***Accounts*** page displays recent transactions by default, and ***View Transaction History*** lets you filter, sort, or view transactions.



Click the drop-down to the right of the desired filter. Select the filter option. The grid will automatically filter to the options you choose.

Filter transactions by:

- ***Plan Name***
- ***Transaction Type:*** *Work Reports, Payments, Adjustments*
- ***Status:*** *Open, Closed, Disputed, Hold, All*
- ***Report Status:*** *(for Work History Reports and Adjustments): All Pending, Released, Initial*

ESS: Accounts—Work History Reports

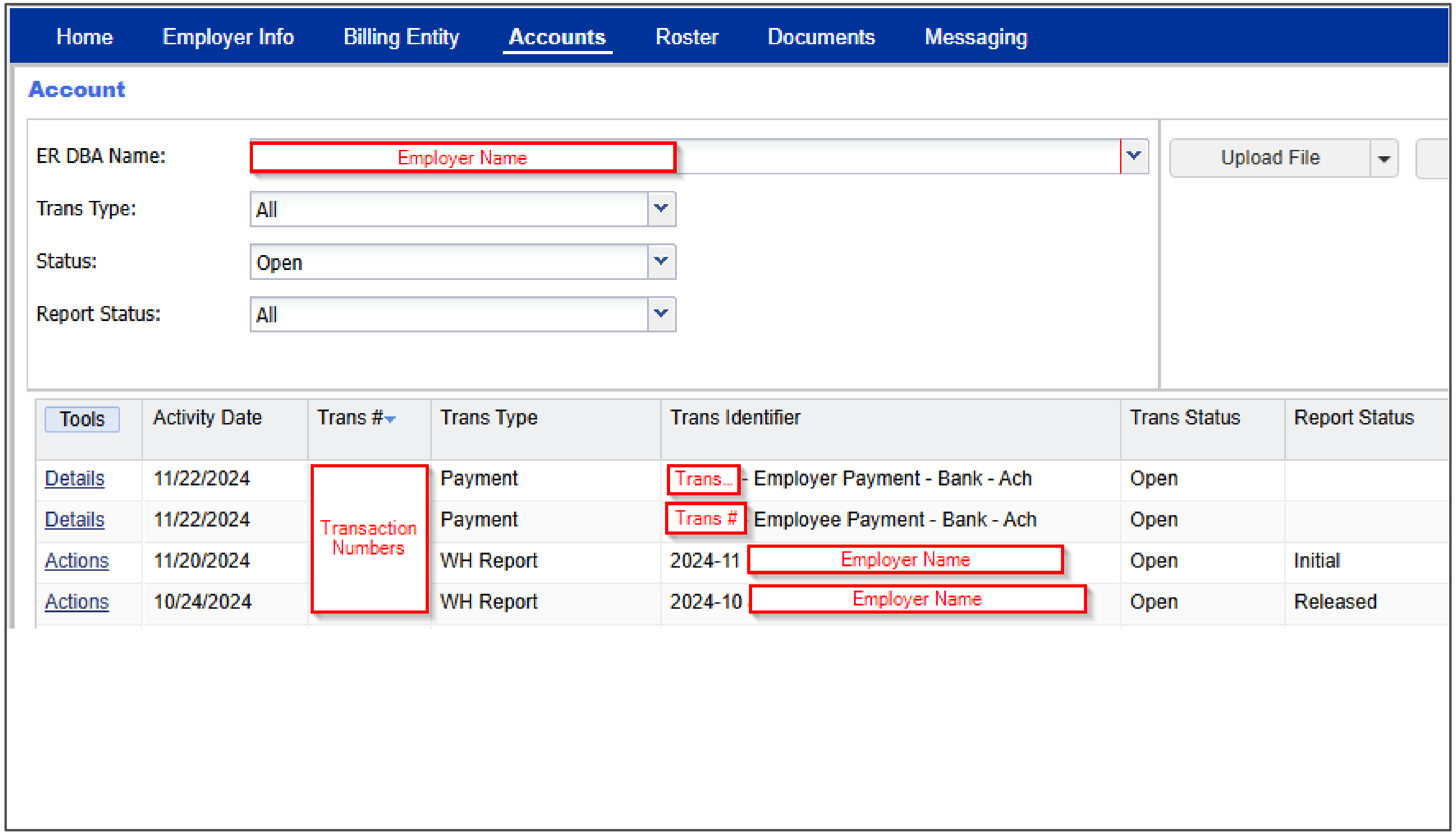
Work History Reports

The transaction type for all work reports is WH Report.

The trans identifier for all work reports will be the Year – Month and Employer Name

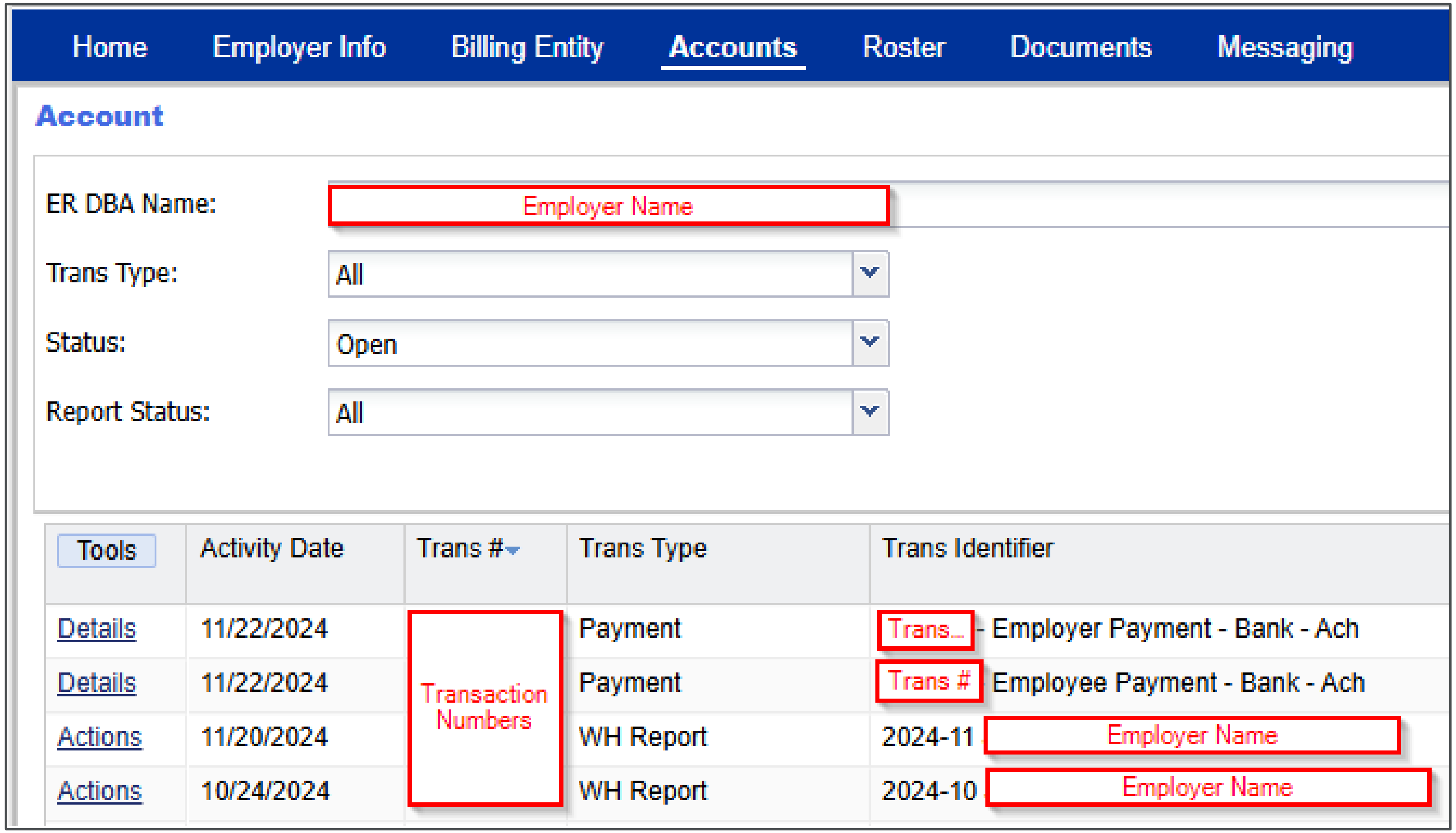
Report Status

- **<u>Initial:</u>** not yet submitted
- **<u>Pending:</u>** submitted and pending UHH approval
- **<u>Released:</u>** approved by UHH and released



ESS: Accounts—Transaction Types

- **Payments:** Payment transaction on the account
- **WH Report:** Work History Report transactions
- **Interest:** Interest transactions for late payments
- **Liquidated Damages:** Liquidated Damages transaction for late payments
- **WH Adj:** work history adjustment

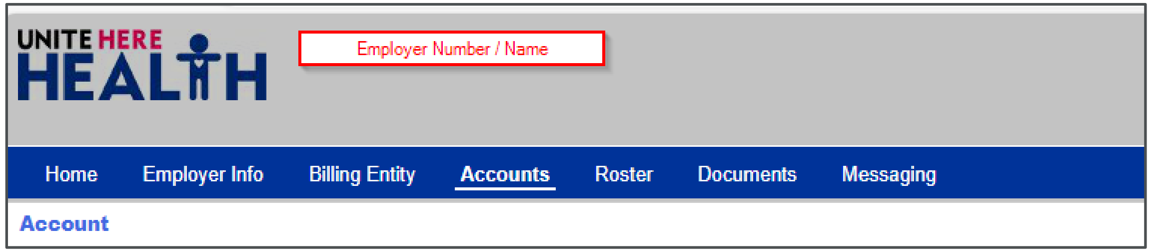


ESS: Accounts—Work Report Process Overview

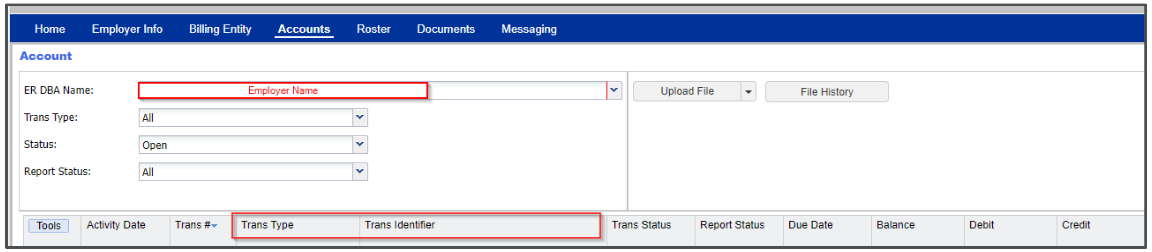
1. Go to the **Accounts** Tab
2. Find your **Monthly Report**
3. Click the **Actions** button
4. Click **Edit**
5. **Work Report Editor** screen will appear
6. Select the **Job Category**
7. **Filter Report** alphabetically or by SSN
8. If employee is active, enter **Units** *(days, weeks, or months)*
9. The amount due will display in the **H&W Due** column
10. If employee isn't active, select the correct **Work Status**
11. Be sure to enter units and/or work status for **Each Employee**
12. Click **Apply**
13. **Review Report** and make any needed changes
14. Click **Save**
15. Click the **Actions** button and select **Submit**

ESS: Accounts—Work Report Process *(Steps 1-5)*

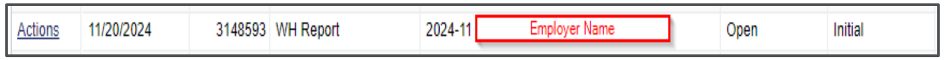
1. Go to the **Accounts** tab to submit your monthly work report



2. Find the **Monthly Report** to process by looking for a Trans Type of WH Report and Trans Identifier; the Trans Identifier reports the month and year of the work report

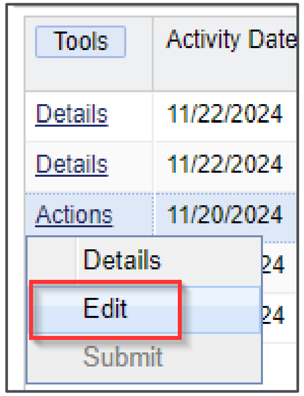


Example:

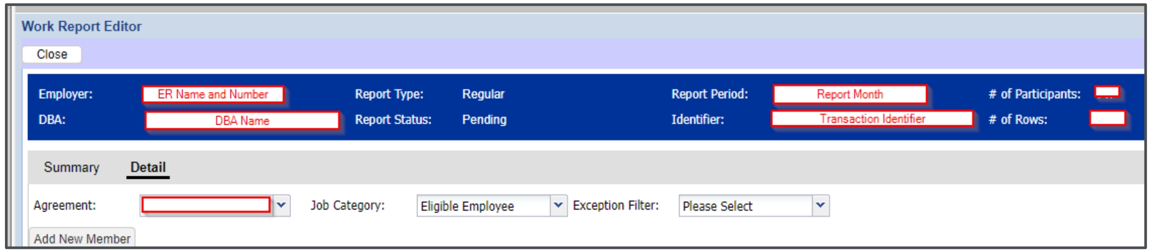


3. Click the **Actions** button *(located in the **Tools** column)*

4. Click **Edit**

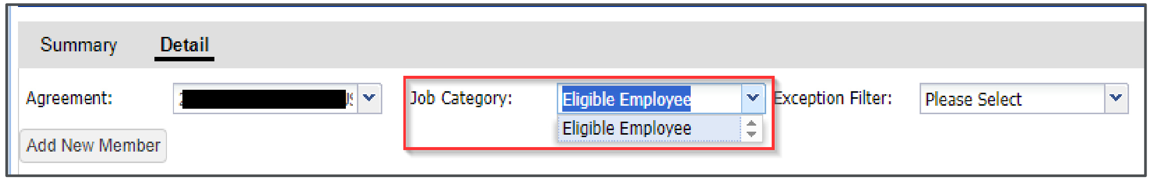


5. The **Work Report Editor** screen will display



ESS: Accounts—Work Report Process *(Steps 6-10)*

6. Click the Drop-down in the **Job Category** field to select the appropriate Job Category



7. To **filter the report** alphabetically, click on Name; To filter by SSN, click on SSN *(report will sort by ascending or descending order)*

8. If the employee is active, worked, and has met all other requirements, enter the **Units** *(days, weeks, or months)* in the appropriate column

Tools		Actions	Name	SSN	Job Category	Start Date	Stop Date	Work Status	Months	DedAmount	H&W Due
			[redacted]	[redacted]	Eligible Emplo...	12/01/2024	12/31/2024	Active	1	$0.00	[redacted]
			[redacted]	[redacted]	Eligible Emplo...	12/01/2024	12/31/2024	Active	1	$0.00	[redacted]
			[redacted]	[redacted]	Eligible Emplo...	12/01/2024	12/31/2024	Active	1	$0.00	[redacted]

9. The H&W amount due will populate in the **H&W Due** amount column

Tools		Actions	Name	SSN	Job Category	Start Date	Stop Date	Work Status	Months	DedAmount	H&W Due
			[redacted]	[redacted]	Eligible Emplo...	12/01/2024	12/31/2024	Active	1	$0.00	[redacted]
			[redacted]	[redacted]	Eligible Emplo...	12/01/2024	12/31/2024	Active	1	$0.00	[redacted]
			[redacted]	[redacted]	Eligible Emplo...	12/01/2024	12/31/2024	Active	1	$0.00	[redacted]

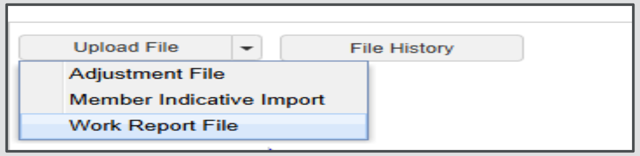
10. If the employee doesn't meet the requirements, double click their **Work Status**, click the drop down, and select the appropriate work status *(see Status Codes)*

ESS: Accounts—Work Report Process *(Steps 11-15)*

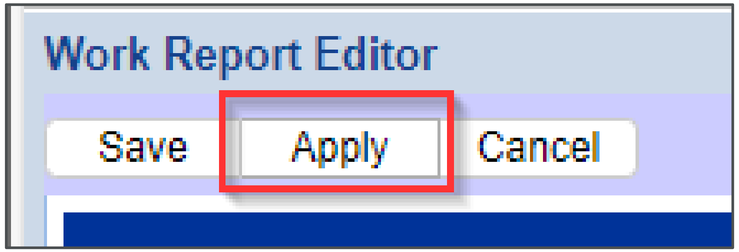
CAUTION!

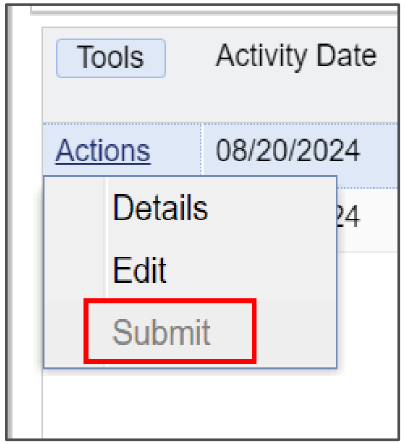
DO NOT use this function to upload a file

Please refer to ***Secure Messaging*** for instructions on attaching documents



11. Make sure you have entered units and status for **Each Employee**
12. Click **Apply** *(This will allow you to stay in edit mode if you need to make any changes)*
13. **Review the Report** to ensure each employee is accounted for and the H&W amount due calculates
14. Once you have confirmed the report is accurate, click **Save**
15. Click the **Actions** button located to the left of the Trans Type "WH Report" and select **Submit**





ESS: Accounts—Work Report Process—Printing or Downloading

1. Click **Accounts**

2. Highlight the **Work Report**

3. Right click on **Tools** tab

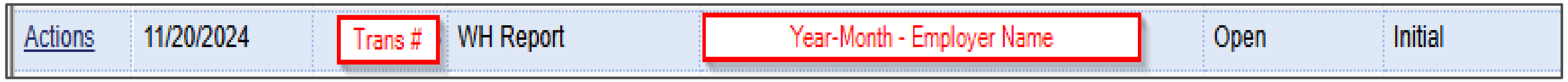
4. Select **Reports**; then **Work Report**

5. Click **Export**

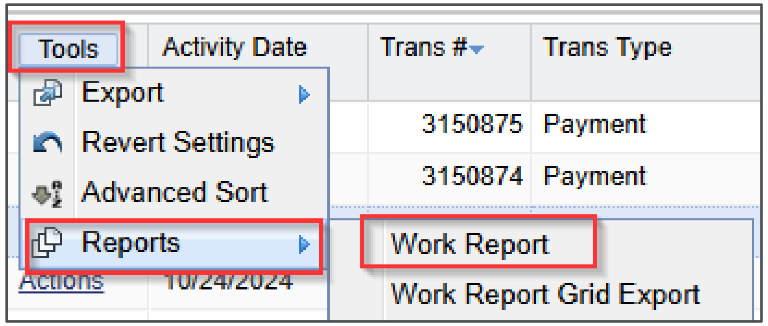
6. Select the **File Type**

1. Click on **Accounts**

2. Highlight the **Work Report** you want to download or print by clicking on the row; it will turn blue once clicked

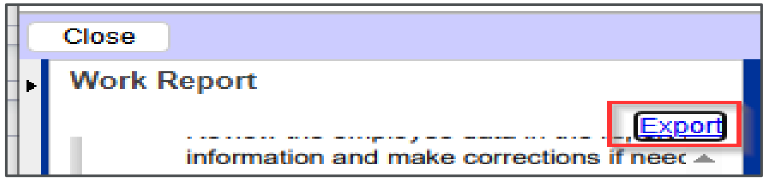


3. Right click on the **Tools** tab



4. Select **Reports;** then select **Work Report**

5. Click on **Export**



6. Select the **File Type** option you would like *(Excel or Pdf)*

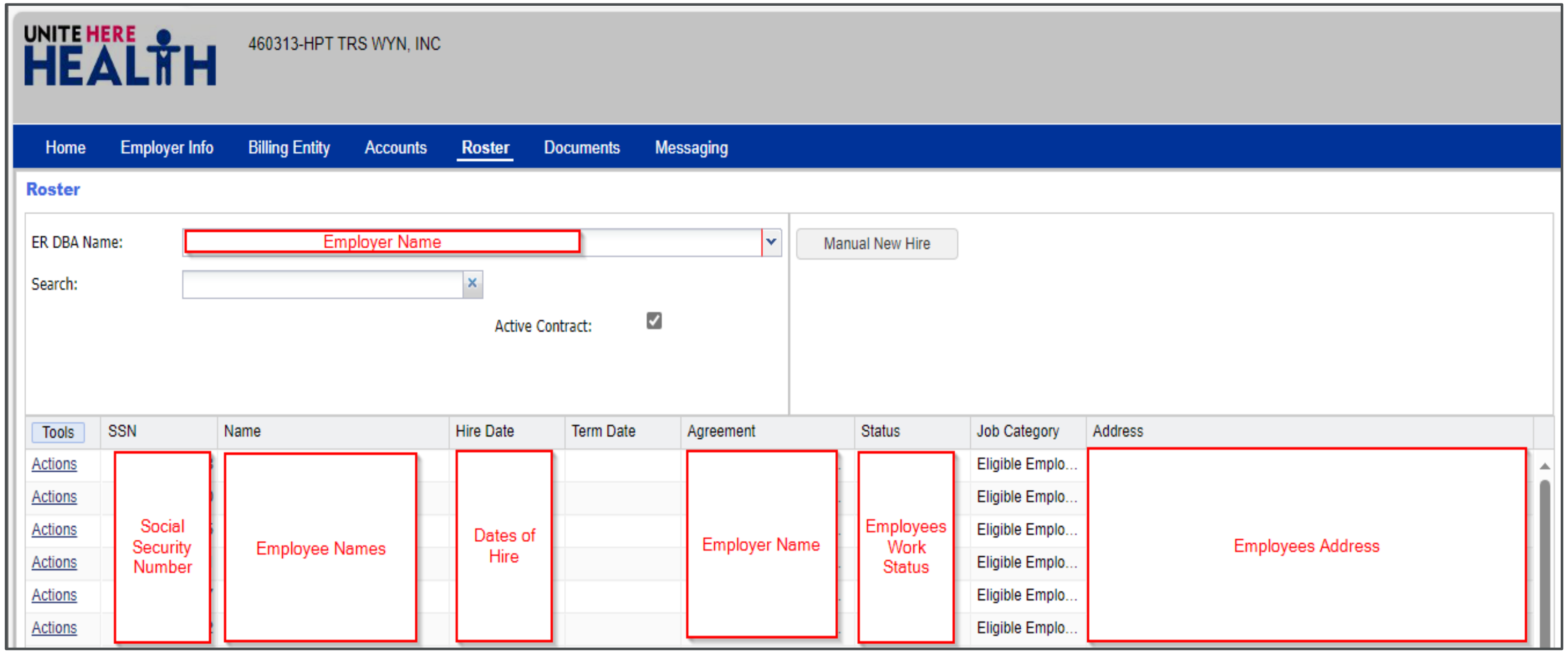
ESS: Roster

The ***Roster*** page lets you view and manage your roster of employees.

You can:

- View Employee Info
- Update an Address

Contact your Account Representative to add a new hire.



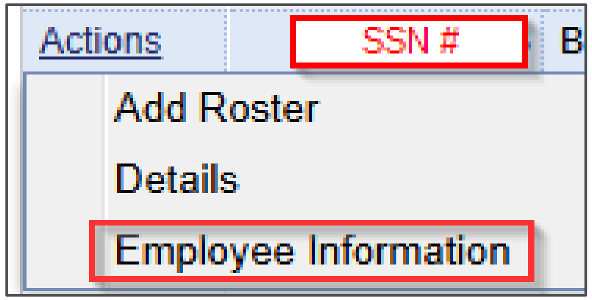
ESS: Updating an Address *(Overview and Steps 1-2)*

1. Go to **Roster**
2. Click **Actions**; then **Employee Info**
3. Click the **Change** button
4. Click the **Gear**
5. Fill in **New Residence Address**
6. Click **OK**; then click **Save**

Member addresses can ONLY be updated for existing members if no address currently exists in our system; for any other address updates, please contact your Account Representative

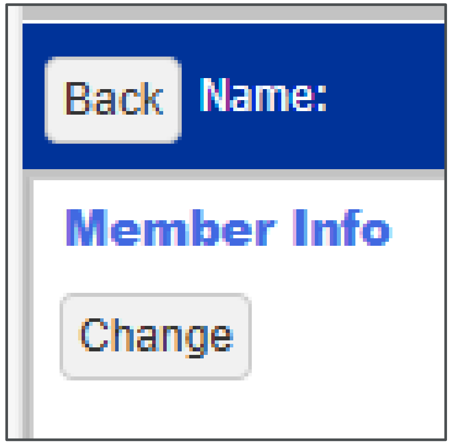
1. Go to **Roster**; you can filter the report alphabetically *(click on name)* or by social security number *(click on SSN);* then sort by ascending or descending order

2. Click the **Actions** icon for the appropriate employee and select **Employee Information**; Member Info screen will display

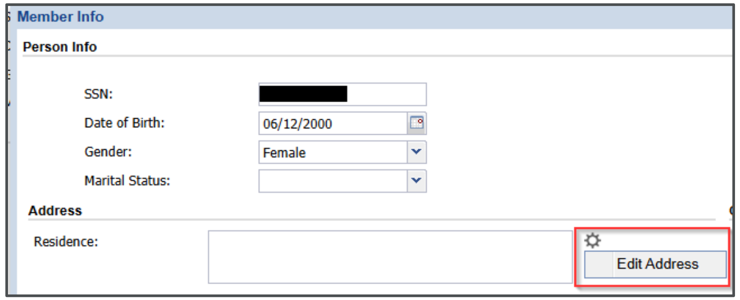


ESS: Updating an Address *(Steps 3-6)*

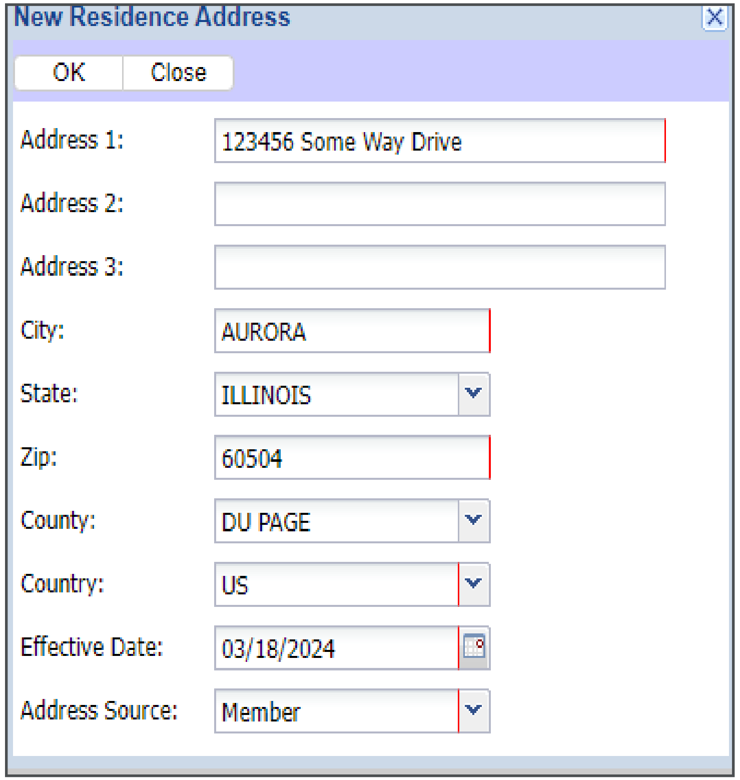
3. Click the **Change** button



4. Click the **Gear** in the Residence Address field



5. Complete the **New Residence Address** box *(don't use any special characters like period, dash, comma, pound, etc.)*
   - **Address 1:** street address
   - **Address 2:** apt or bldg number
   - **Address 3:** leave blank
   - **City, State,** and **Zip**
   - **County** will automatically populate when zip code is added
   - **Effective Date:** today's date
   - **Address Source:** Employer

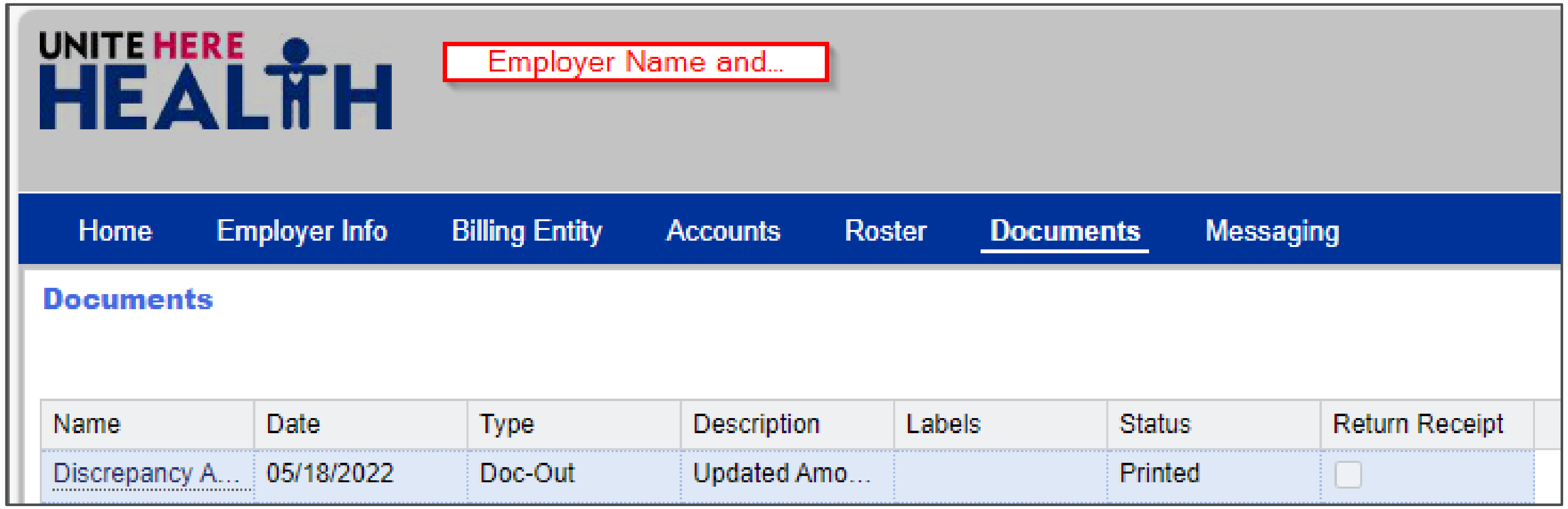


6. Once the address is entered, click **OK**, and then click **Save**; verify the information is correct and click confirm

ESS: Documents

On the ***Documents*** page, you can access your documents from UHH. These documents are created in V3 by UHH staff through our Customer Relation Module. Any document created in V3 can be viewed in the ESS.

- Click on the document ***Name*** to open it
- Click ***Close*** to close the document



ESS: Messaging

1. On the Messaging page, click **New**

2. In the **Topic** field, select account or reporting

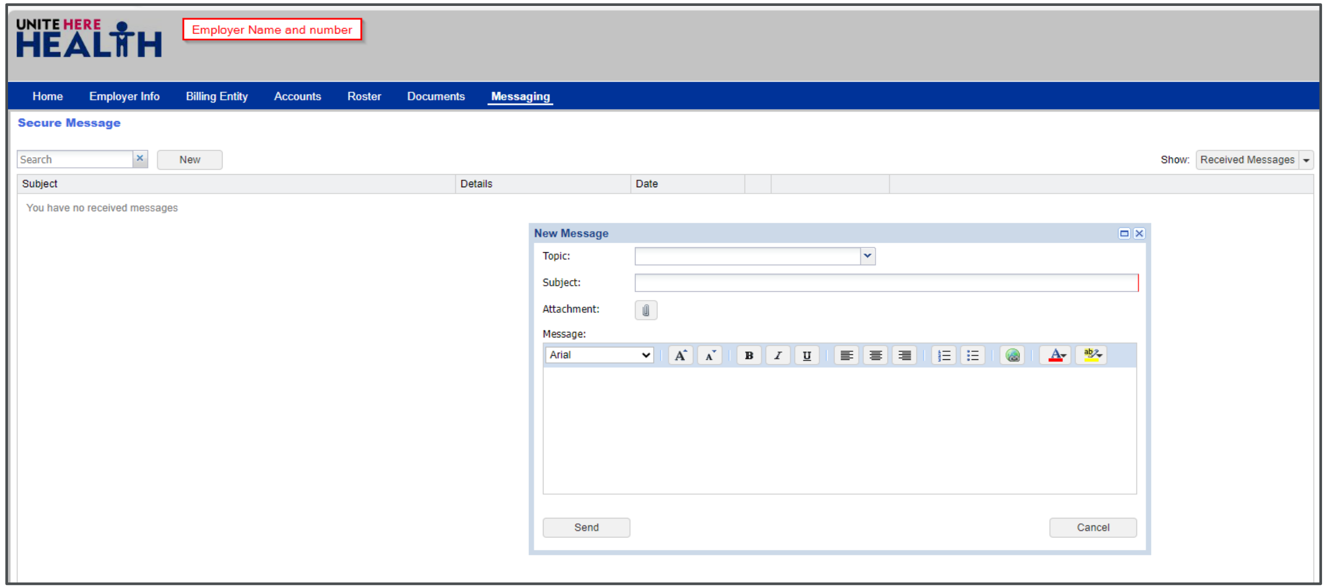
3. In the **Subject** field, describe what you're sending

4. **To attach a file**, click the paper clip and select external; then find your file and click open

5. Type needed information in the **Message** area

6. Click **Send**

The Messaging page allows you to send a secure message to UHH about your account, reporting, adjustments, or enrollments



Status Codes

A status code is a field you use on your Work Report to communicate an employee's status. Since an employee's status can change from month to month, **it's critical that the employee's status code is accurate on the Work Report.**

A status code confirms the employee's status, for the month you are reporting. If you have an employee on FMLA, there's a status code for that. If you have an employee who hasn't met the required work hours for the month, there's a status code for that, too. There are more than 20 common status codes that an employee might be under.

The correct status code is also important because it works in conjunction with other functions to ensure accuracy within the enrollment system.

The following two pages list the most common status codes used, their abbreviations, and when the status codes should be used.

As always, if you need assistance with status codes, reach out to your dedicated Account Representative for support.

Status Codes 1-8

	Status Code	Description	Definition & When to use
1	A	**Active**	If the Employees hours are from continually working and meeting the requirements set forth by the CBA AND the Employee is not on FMLA, Workman's Compensation, or any type of leave.
2	BHR	**Below Hours Requirement**	The employee is continually working but working below the required hours set forth by the CBA. Employee is not on FMLA, Workman's Compensation, or any type of leave.
3	CJC	**Change Job Category**	Member is being moved to another job category. The employee will need to be added to the new job category and given the correct Active status code and given the CJC status code in the old job category.
4	D	**Death**	The employee has passed away in the month of the report you are completing.
5	FMLA	**Paid Family Medical Leave Act**	The Employee is on Medical Leave and has not exhausted the time allowed for paid medical leave. Note: If the employee has exhausted the time allowed for paid medical leave but is still out on medical leave follow up with your representative for coding instructions.
6	NC	**Change to Non-Covered**	An employee has transferred into a non-covered job classification and is no longer required to be included on the Work Report. Only report those employees who are in a covered job classification as set forth by the CBA.
7	NE	**No Election**	The employee has not yet enrolled in the coverage. Please reach out to your Account Representative if you have any questions.
8	NW	**No Work**	The employee is not working and is not on any type of leave but is still employed with your organization.

Status Codes 9-17

	Status Code	Description	Definition & When to use
9	**PLO**	**Paid Layoff**	Employee is on paid layoff.
10	**SLO**	**Seasonal Layoff**	Employee is on seasonal layoff.
11	**TP**	**Terminated Paid**	Employee was terminated but **DID** work in the reported month.
12	**TU**	**Terminated Unpaid**	Employee was terminated and **DID NOT** work in the reported month.
13	**UFML**	**Unpaid FMLA**	Employee has exhausted the allotted Family Medical Leave Act benefit but has not yet returned back to work.
14	**ULO**	**Unpaid Layoff**	Employee is on unpaid layoff.
15	**WC**	**Workmen's Compensation**	Employee is on Workman's Compensation.
16	**WP**	**Waiting Period**	Employee is in the waiting period to become eligible for contributions.
17	**WV**	**Waiver Health and Welfare**	The employee is waiving the coverage being offered. Please reach out to your Account Representative if you have any questions. Not all CBA's allow for waivers.

Adjustments

An adjustment is a correction that needs to be made to your monthly Work Report ***AFTER*** it's been submitted to the Fund.

You might need an adjustment if:

- You submitted a Work Report with the wrong status code
- You forgot to report an employee or reported an employee by mistake
- An eligible employee was terminated during the month the Work Report was submitted *(didn't work enough hours to meet the requirements)*
- A Promise to Pay may be required to complete your adjustment. If so, payment is due within 30 days from the date it's completed

Please Note: *If you erroneously report and remit contributions for an employee, the Fund will only issue a credit for the mistaken contribution if the request does not retroactively impact the employee's coverage*

Information required
Email the employee information below to your Account Representative:

- *First and last name*
- *Social Security number*
- *Report month to adjust*
- *Number of hours/weeks/ units to adjust*

Once we receive, we'll calculate the adjustment. You'll be notified when the adjustment is done. A Promise to Pay is required.

Department of Labor Notifications

The Department of Labor requires all employers to timely remit employee contributions. UHH must report the amount of participant contributions that aren't remitted within 90 days of the date they're received by the employer.

Separately, UHH must report and distinguish the portion of contributions made by the employer and the portion of contributions made by the employee.

Payments

The Fund offers easy ways for employers to submit payments.

Your Account Representative will provide assistance getting your payment options set up.

Payment Options:

Through the Employer Portal from a bank account

This is the fastest way to send us payment. Our online portal is easy to use and best of all, totally secure.

To make an online payment you will need to log into our employer portal and select "Make Welfare Fund Payment". These payments usually post to your account in **24 hours**.

ACH & Wire transfer

Want a quick way to send payment? You can submit your payment via wire transfer. You can wire your payment to us, usually within 2-3 days by providing the information below:

- SWIFT Code
- ABA Routing Number
- Account Number
- Account Name

Making Online Payments

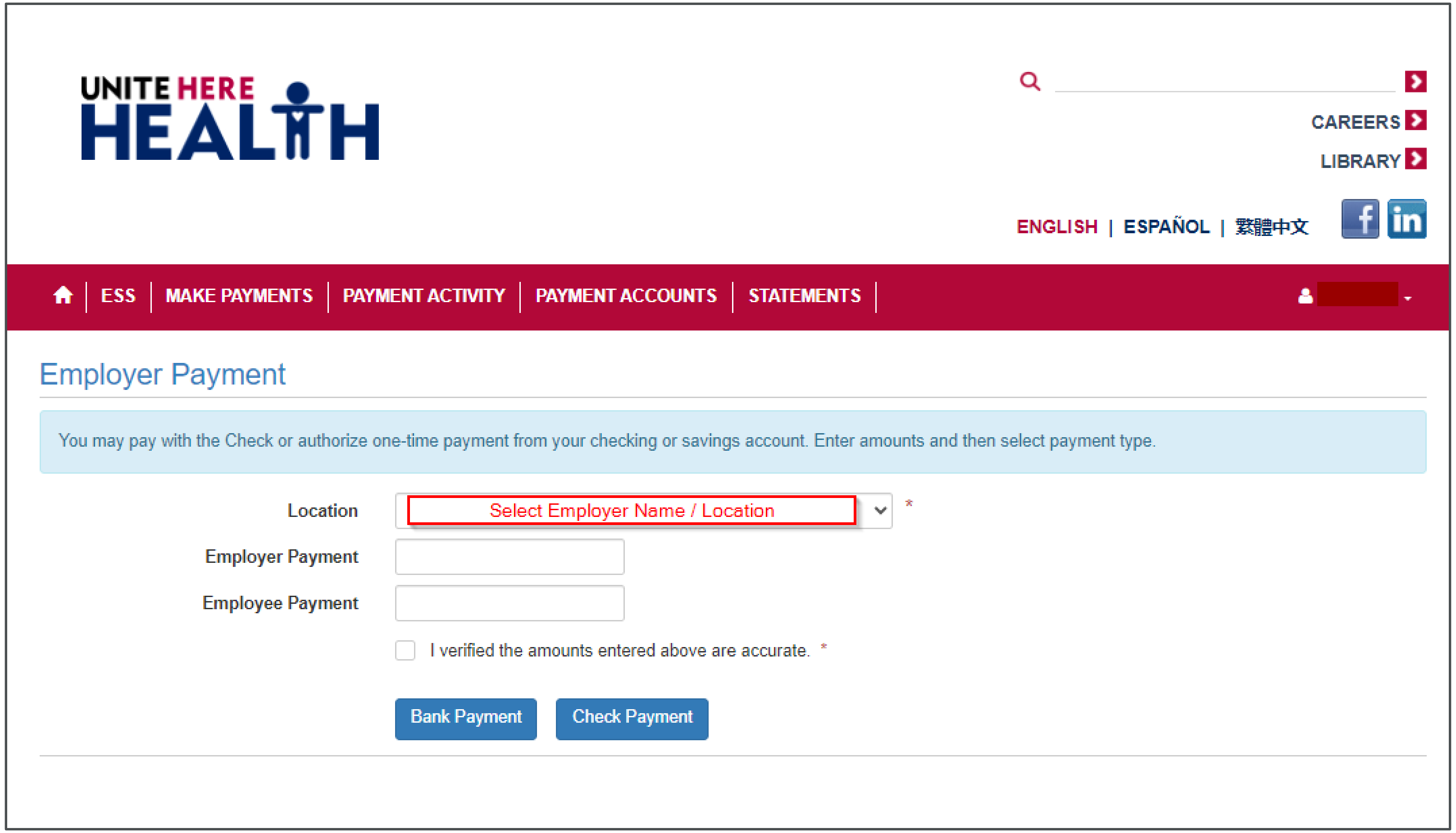
1. Click **Make Payments**

2. Select the **Location**

3. Enter the **Employer Payment**

4. Enter the **Employee Payment**

5. Click **Bank** or **Check Payment**

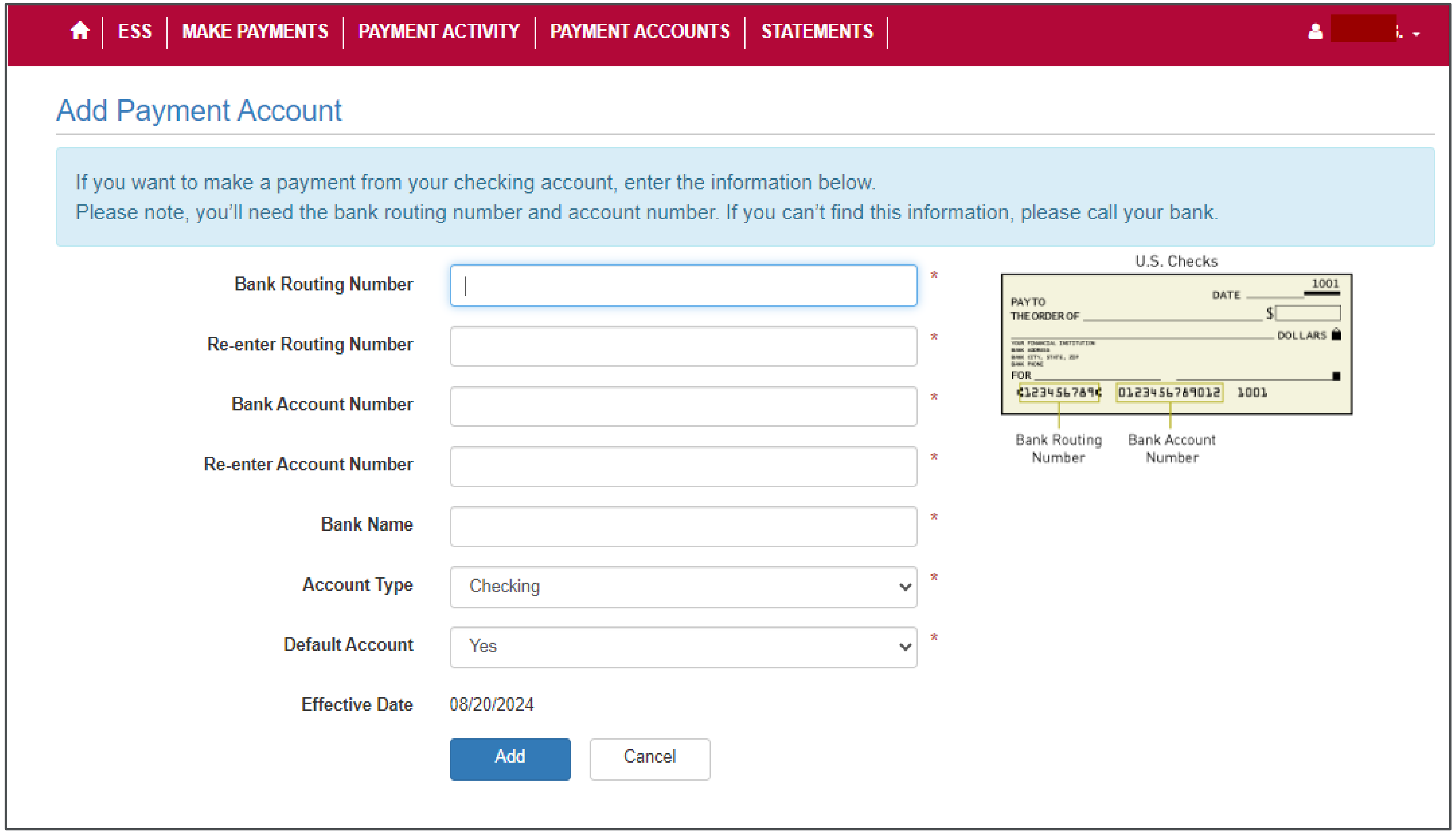


Adding a Payment Account

You can set up a ***Payment Account*** to make payments to UHH from your checking account.

You'll need the following:

1. Bank Routing Number
2. Bank Account Number
3. Bank Name
4. Account Type
5. Effective Date

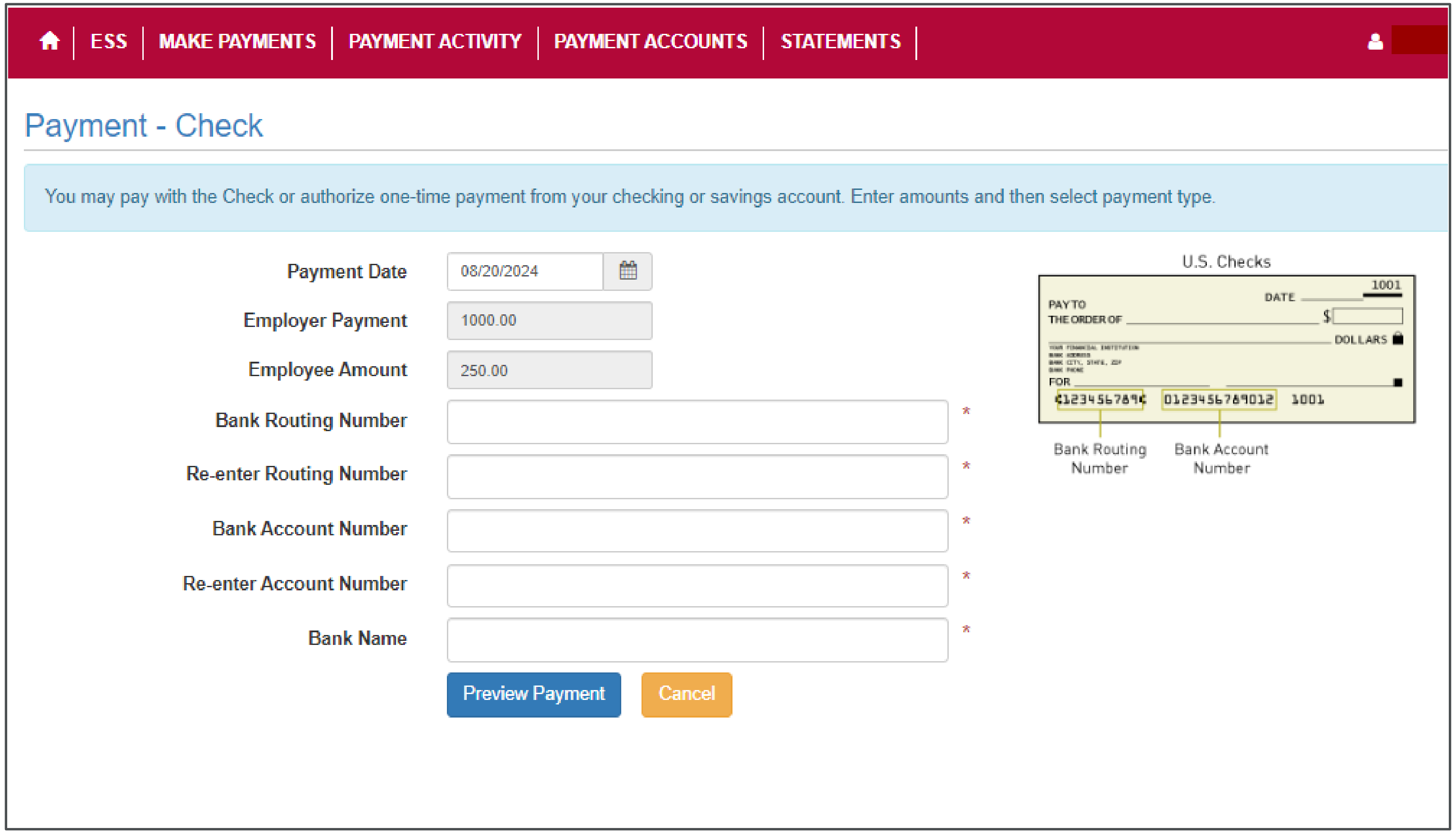


Making a One-time Payment

You can also pay with a check or authorize a one-time payment from your checking or savings account.

You must enter your:

- Bank Routing Number
- Bank Account Number
- Bank Name



Reporting New Hires

When you hire a new employee, it's important to notify your Account Representative right away. **<u>AND</u>** be sure to include the new hire in your next monthly Work Report.

You need to apply any applicable status codes for that month as well. For example, the status code WP is used for waiting period.

Information to submit to UHH

- ❑ Employee name
- ❑ Date of hire
- ❑ Social Security number
- ❑ Date of birth
- ❑ Gender
- ❑ Current address
- ❑ Phone
- ❑ Email

Terminations

When an employee is no longer employed, you must notify your Account Representative right away. Send an email ***as soon as there is a change*** to an employee's status that impacts their coverage. ***Don't wait for the monthly Work Report.***

To terminate an employee for a Work Report month, include the termination date and the status code. ***Retroactive terminations that take away benefits are not allowed.***

If changes are not reported in a timely manner, you must pay the ***entire contribution*** for that employee, including any co-premiums normally paid by the employee, for the work month and each additional month until the status change is reported to the Fund.

Examples of other codes that affect coverage status:

- *Below Hours Requirement (BHR)*
- *Unpaid FMLA (UFMLA)*
- *Unpaid Lay Off (ULO)*
- *Moved to Non-Covered Job Classification (NC)*

Questions?

As a partner with ***UNITE HERE HEALTH***, you have a dedicated Account Representative to assist you with your monthly tasks. This includes submitting Work Reports, ensuring payments are received on time, and communicating account adjustments needed to ensure your account is current.

Questions? If you have any questions about your account, please reach out to your Account Representative.

Employee questions?

If one of your employees needs help, please tell them to contact our Member Services Department.