eComply Contractor User Manual

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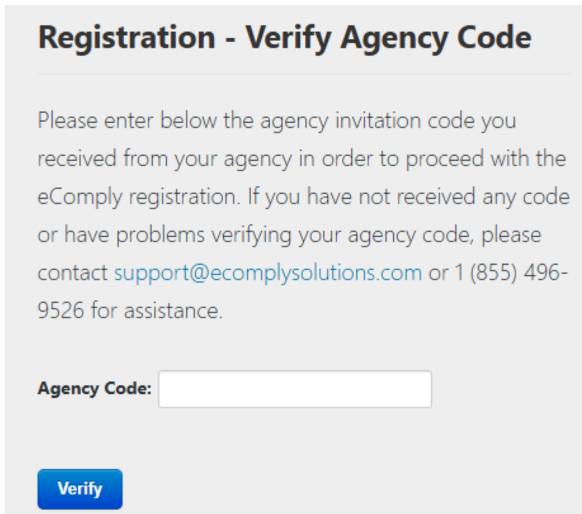
Support: support@ecomplysolutions.com | 1-855-496-9526

New Organization Registration

- ***Note*** - Your company should only register once (1) in eComply! **Not** by project or agency count. Additional users should always be added within the registered account.

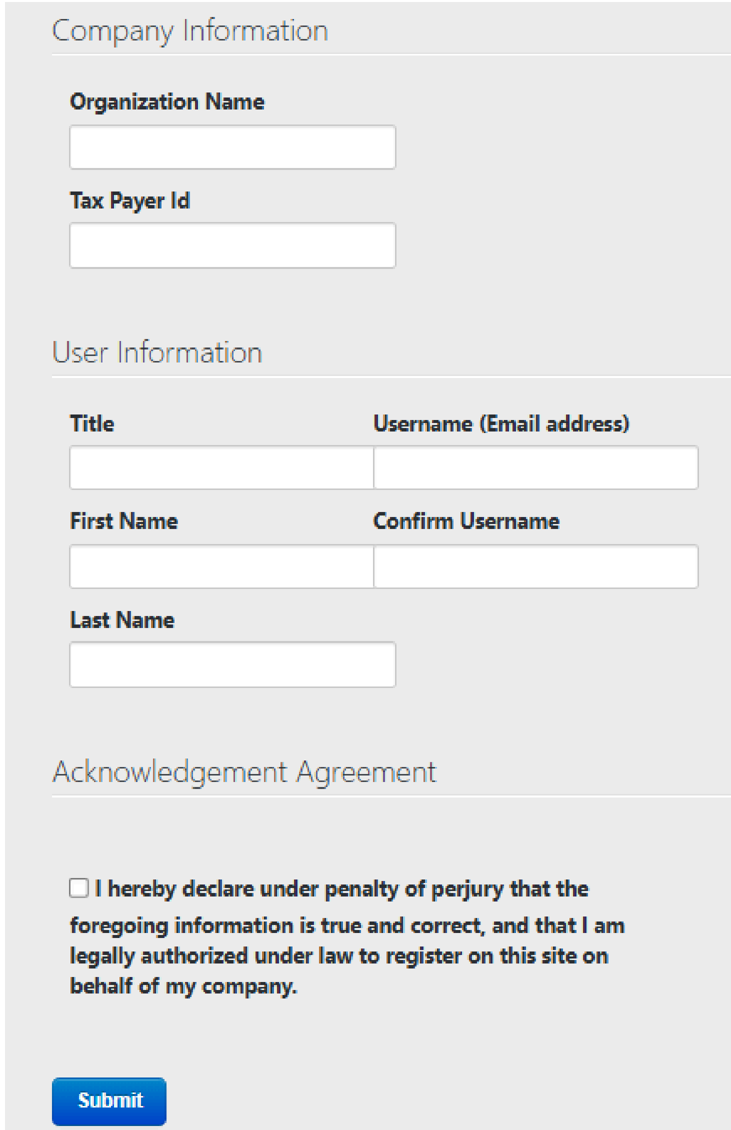
1. Go to the company URL provided by your agency administrator OR https://prod.ecomply.us

2. Find 'Don't have an account? Create One' in center of screen
   a. Select 'Create One' as it is a link



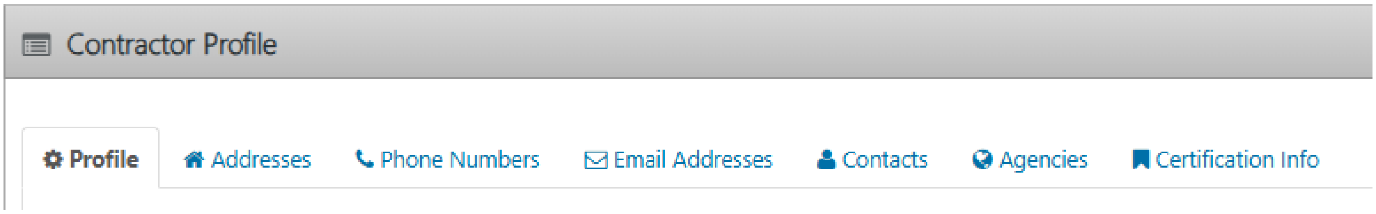
3. Enter the agency invitation code you received from your agency administrator. If you have not received any code or have problems verifying your agency code, please contact support@ecomplysolutions.com or 1 (855) 496-9526 for assistance.

4. Enter all required Company and User Information and Acknowledge Agreement to Submit
   a. *Example Only:*



5. A Set Password email will be sent to the address provided from no-reply@ecomplysolutions.com
    a. This email is only good for FOUR **(4) hours**. If a login is not confirmed/completed from this link within that timeframe, contact Customer Support to request a new link.

6. Once fully logged in, you will be taken to the 'Contractor Profile' screen.
    a. Fill out all required fields in bold
    b. If you do not have all the information, you can 'Save as Draft' to complete the remainder later.
    c. *Example Only:*



7. When you reach the 'Contacts' section, Select 'Add Person' and fill in all required fields before selecting 'Add Contact' at bottom of screen
    a. Repeat for each contact needed
8. Choose 'Save as Draft' to complete all sections at a later time, or 'Save & Complete Registration' to finalize all sections

Note: Registration is NOT complete unless all tabs are done and the 'Save & Complete Registration' button no longer shows.

9. Once your company is registered let whomever your contract is with know, so that they can assign you to the project.

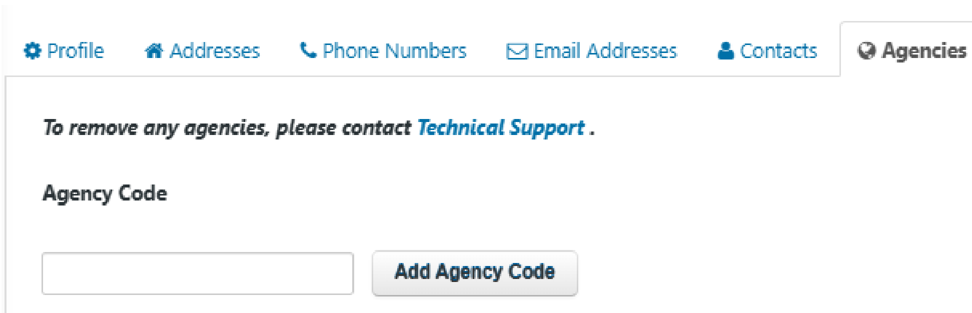
Support and Training videos links will show when users log in under: 'Activities' > 'Support' > 'Training Videos'

View an Existing Organization

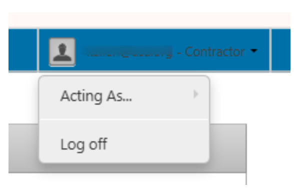
Note: If your agency is creating your users for you, this function will not be available.

If you have completed the 'New Organization Registration' steps in this document, and have a previously existing eComply account that you use for another agency that you would like to view under one login.

1. Login
2. Locate the left side menu tabs 'Activities|Setup' at top left of screen > Select 'Setup' to view the needed administrative options.



3. Navigate to the 'Certified Reports' section of the menu
    a. Select 'My Organization'.
    b. Select 'Agencies' from top menu
    c. Enter the "Agency Code" for the additional agency > select 'Add Agency Code'
4. Select 'Save Changes'
    a. From top right corner of the screen, logout and log back in to confirm
        i. Navigate back to the 'Agencies' tab as instructed above to see the updated list of agencies on bottom of screen

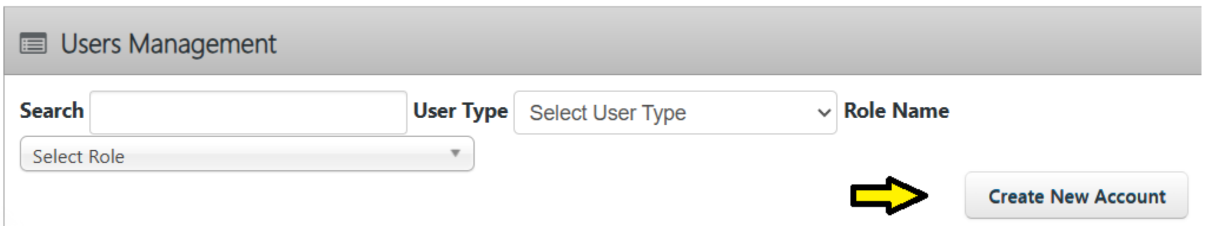


User Management

- Additional Users - An organization will only register with eComply once allowing you to add as many additional users for your organization if needed.

1. Locate the left side menu tabs 'Activities' | 'Setup' > Select 'Setup' to view the needed administrative options
2. Navigate to the 'Account Settings' section of the menu - Select 'User Management'.

Note: *Each added user should only be associated with one (1) role.*



3. Select the 'Create New Account' option to the far right.
4. After selecting the applicable 'General Information', select 'Add Profile' to be guided to the next two sections (Account Details and User's Profile) to provide basic needed user details.

Note - When creating additional users for your organization, the admin has the option to create them as a Company Admin, Submitter or Data Entry user. The basic role permissions are as follows:

- *Company Admin* – Full privileges (The person who registers your company is automatically this role, you can have multiple Company Admins).
- *Submitter* – Able to create and submit CPRs, and documentation
- *Data Entry* – Able to enter data i.e. employees, FB, CPR's etc., but not submit.

5. Select 'Finish'.
6. A '**Set Password**' email will be sent to the address provided from no-reply@ecomplysolutions.com

This email is only good for FOUR **(4) hours**. If a login is not confirmed/completed from this link within that timeframe, contact Customer Support to request a new link.

- Edit User

-For all users who intend to change their own user details.

Note: *Agency Admins are able to change any users information*

1. Locate the left side menu tabs ‘Activities’ | ‘Setup’ > Select ‘Setup’ to view the needed administrative options.
2. Navigate to the ‘Account Settings’ section of the menu - Select 'User Management'.
3. Select 'Edit' for the user profile you wish to edit
   Note: *An Agency Admin is also able to Lock, Unlock, or Remove a users account*
4. Select 'Update Profile' to save.

Electronic Signature Setup

1. Login
2. Locate the left side menu tabs 'Activities|Setup' at top left of screen > Select 'Setup' to view the needed administrative options.
3. Navigate to 'Account Settings' > Select 'My Profile'
4. Scroll to bottom of the page to upload an optional and **legible** digital image signature in *.jpg, .jpeg, .gif or .bmp* format only.

Note- Although this is optional, the signature image **must** belong to the officer named above on the screen! If you need assistance uploading your signature, send your signature file to support@ecomplysolutions.com

Managing Classes/Crafts

- Here you will be able to select the applicable crafts and classifications that pertain to your company and the work being performed for each project.

  1. Locate the left side menu tabs ‘Activities’ | ‘Setup’ > Select ‘Setup’ to view the needed administrative options
  2. Navigate to the ‘Certified Reports’ section of the menu - Select 'Craft and Classification’
  3. Select ‘Add Craft’
  4. Select the intended project

     Note- If you are not yet assigned to one, contact your contract rep to get added
  5. Select ‘Add’ next to the classification you need

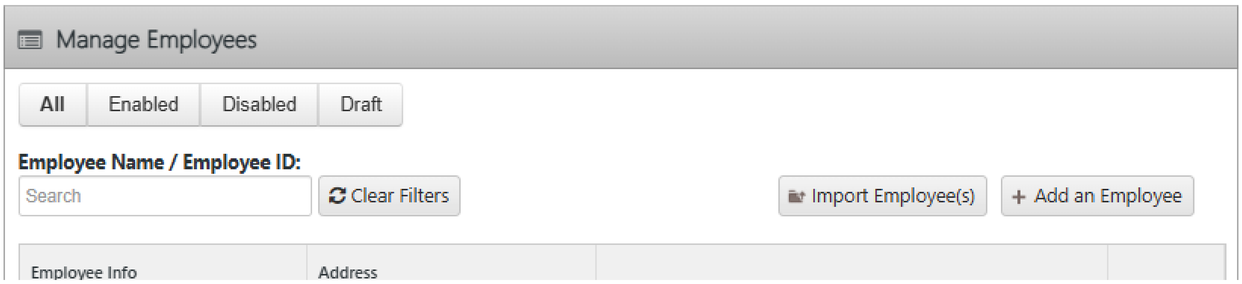
     Note- As you search, you may notice classifications can vary from project to project. Reach out to your organization contact if a classification is missing.
  6. Select ‘Save Changes’

Go to the Manage Employees section of this document to see how to assign them to all classifications.

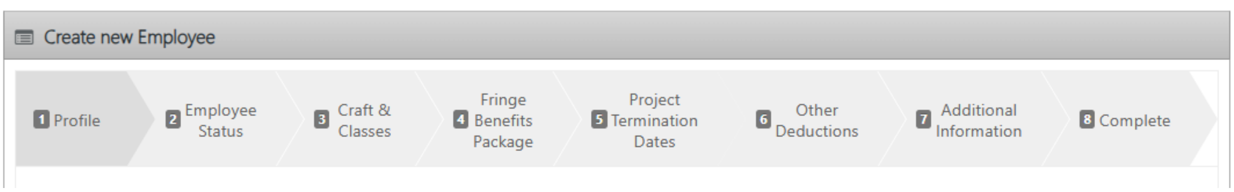
Managing Employees

- Entering and classifying an employee - Here you will be able to add or edit your employees. You will report all employee hours on a project.

    1. Locate the left side menu tabs 'Activities' | 'Setup' > Select 'Setup' to view the needed administrative options
    2. Navigate to the 'Certified Reports' section > Select 'My Employees'
    3. From the new 'Manage Employees' screen, select '+Add an Employee' from the far/top right sid



4. From the 'Create New Employee' screen, fill out each tab one by one - all required fields within a tab are in bold.
    a. For the 'If the employee has multiple applicable crafts and classes, please make sure to select all that apply and choose one as 'default' if applicable.



Note - *If an employee is an Apprentice, you will need to provide proof of apprenticeship documentation to your contractor contact.*

5. When entering the information required, you may select 'Save as Draft' and come back later if you run out of time. Also, additional employees may be added at any time during a project.
6. When complete, select ' Save Employee' to finish.

***Note -** Employees <u>cannot be deleted</u> from the system, changed their status to be inactive in their employee profile when necessary.*

- <u>Manage employee documents</u> - Here you will be able to add all needed documents related to your employees (i.e. section 3, certifications, etc.)

    1. Locate the left side menu tabs 'Activities' | 'Setup' > Select 'Setup' to view the needed administrative options
    2. Navigate to the 'Certified Reports' section > Select 'My Employees'
    3. From the new 'Manage Employees' screen, locate the employee from the list shown > Select the small Document icon to the far right side of that employee
    4. This will navigate you to the 'Manage Employee Documents' screen > Select '+New Document' in far right top corner
        a. From this screen, if you need to change the employee chosen, you may select a new person from the drop down list without *having to navigate backward*
        b. Submit

    ***Note** - Public means everyone in the system above you can see it*

- <u>Assigning Subcontractors (if applicable)</u>

1. Locate the left side menu tabs 'Activities' | 'Setup' > Select 'Setup' to view the needed administrative options
2. Navigate to the 'Certified Reports' section > Select 'Manage Subcontractors'
3. Select the applicable project
4. Select 'Add New Subcontractor'
    a. You may import the subcontractors as well with an excel document
5. **Select the 'Subcontractor' drop down search bar and begin typing** the subcontractor name and a list will appear!

***Note -** If a subcontractor's company does not appear, and they are not already assigned, that means they have not yet registered in eComply and must complete the registration section at the beginning of this manual.*

6. After you find the correct one, enter any missing required Assignment Details on the screen
7. Select 'Submit'
    a. Select 'Edit' for changes, or if added in error, Select 'Unassign' to remove

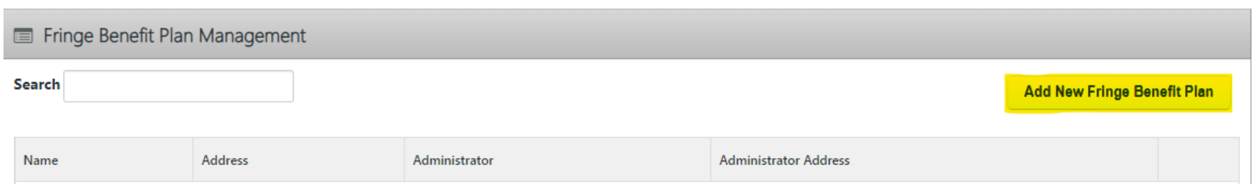
b. Change orders will now also be an option at the top of the screen for that subcontractor if needed

Fringe Benefits Plans & Packages

*Note- this offering **may not apply** to your organization*

- <u>STEP 1/3 - Add a Plan</u> - In addition to the basic hourly rate, contractors can be required to pay fringe benefits either to an employee directly (in cash in lieu of) or to plans/programs on the employee's behalf. The application has a set of standard fringe benefit categories (such as health & welfare, training, and vacation) as well as fields for other benefit types.

    1. Locate the left side menu tabs 'Activities' | 'Setup' > Select 'Setup' to view the needed administrative options
    2. Select 'Fringe Benefit Plan/Program'.
        a. These are the plans or funds you pay to, on behalf of your employees, ie Unions, Training Programs, etc.

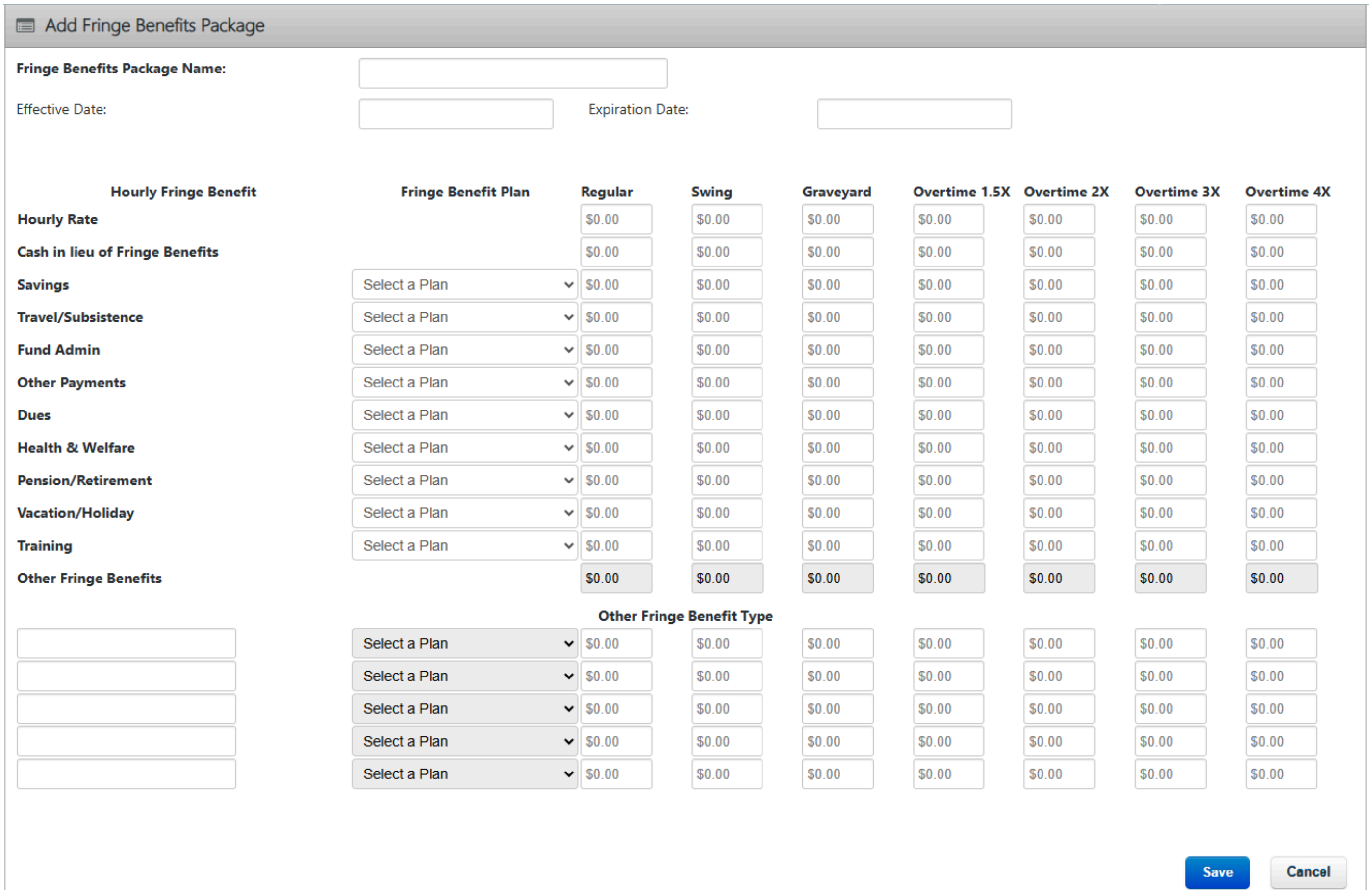


3. Select 'Add New Fringe Benefit Plan' on top/right side
4. Enter the plan/program name and enter all required fields seen in bold faced text.
    a. Package Name - so that you know who the package is for (i.e. Carpenter Journeyman or John Smith)
    b. If the addresses are the same, click the 'Is same as above' checkbox to avoid re-entry.
5. Click "Save"; repeat for each plan/program needed.

- <u>STEP 2/3 - Add Packages to your Plan</u> - Fringe Benefit Packages are **project specific** and can be created to best suit the contractor, based on how you pay your employees.

6. Locate the left side menu tabs 'Activities' | 'Setup' > Select 'Setup' to view the needed administrative options
7. Select 'Fringe Benefits Package' from left panel

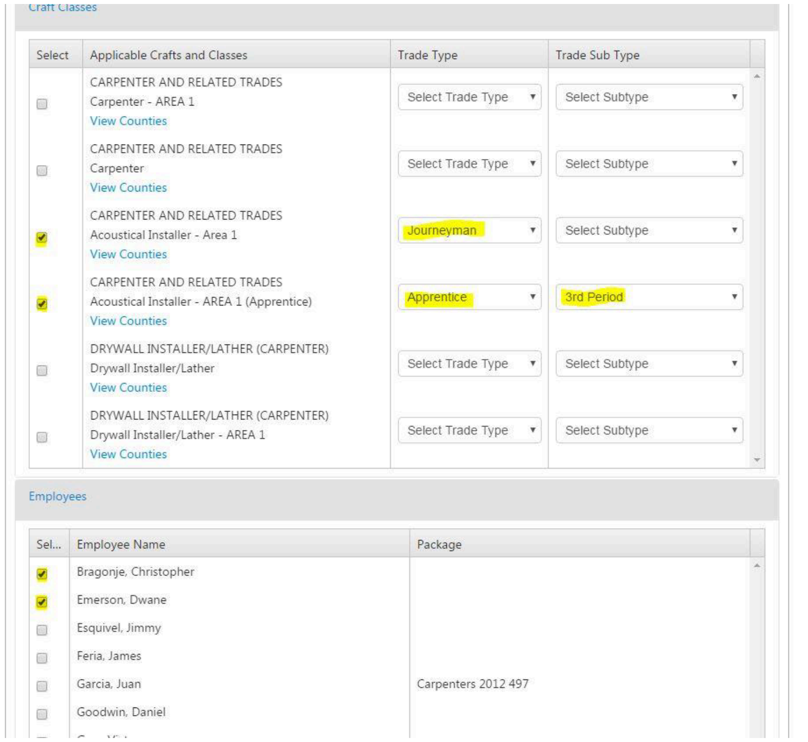
8. Select ‘Add New Fringe Benefits Package’ to far right
9. Fill in the fields



10. Select ‘Save’ when complete.

- <u>STEP 3/3 - Defining your Package Associations</u>- All Fringe Benefit Packages created will need to be defined. This allows users to link Fringe Benefit Packages to crafts and employees for payrolls.

    1. Locate a fringe benefit package and Select ‘Define Association’ to its right
        a. This will direct your web browser to the “Define Association” screen.



The Define Associations screen is divided into two sections.

- The section on the top lists all the company identified crafts and classifications.
- The section on the bottom lists all the active employees stored in the application.

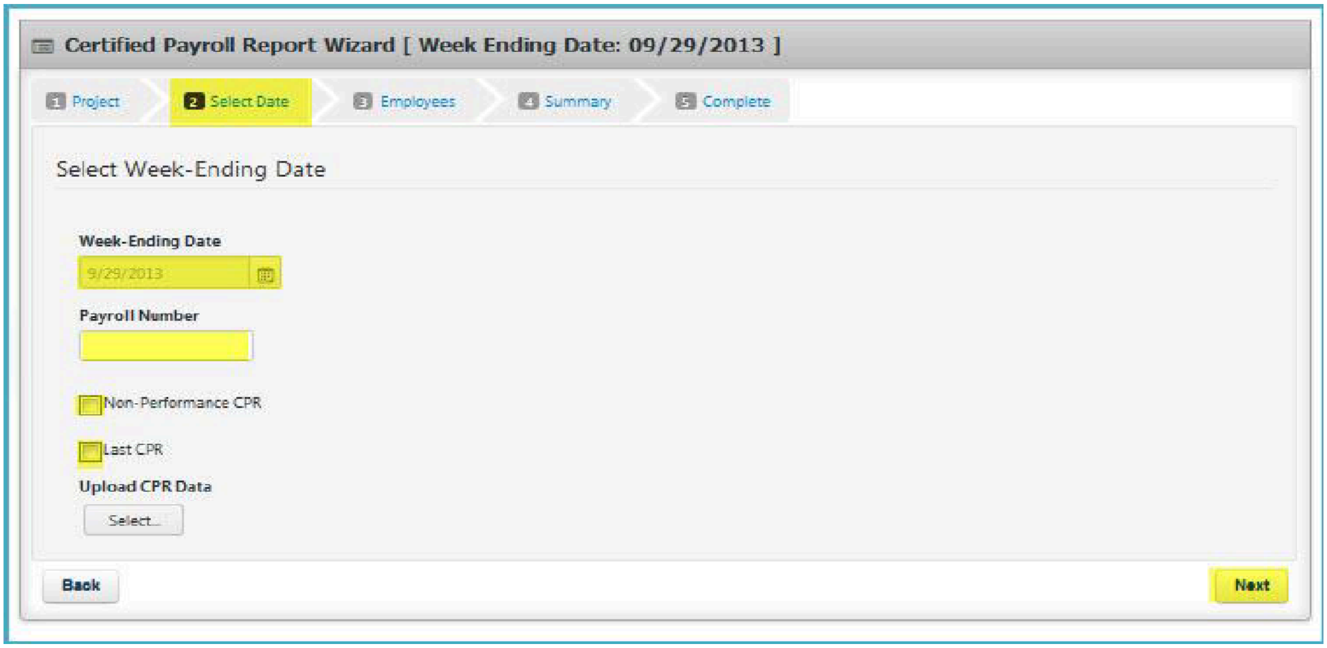
2. Choose the applicable craft and class
3. Choose the Journeyman or Apprentice under Trade Type(if choosing Apprentice be sure to also choose the Trade Sub Type or Apprentice Period).
4. The section to the bottom lists all the employees stored in the application. Select all employees that will default to this Fringe Benefit Package by checking the box next to each name
5. Click "Save."

Note: *Individuals can belong to multiple packages if they work multiple classifications, applicable amounts will be shown for each classification/package associated with the CPR.*

Submit Certified Payrolls

<u>Create a CPR</u>: Frequency: Weekly (worked or not)

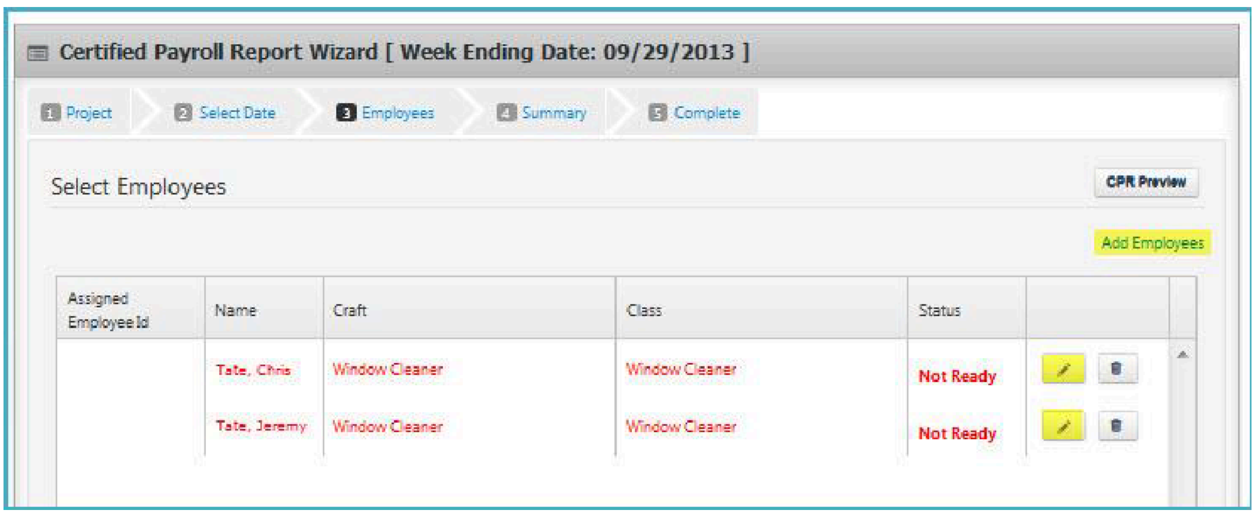
1. Locate the left side menu tabs ‘Activities’ | ‘Setup’ > Under Activities, select ‘Certified REports’ > Manage CPRs
2. Select a Project name from the list in the lower left side box
    a. Any CPR’s available will then populate to the right side section
3. Select ‘New CPR/NP’ button on top of the right side section
4. You will now be directed to the project wizard page with five(5) tabs
    a. Project, Select Date, Employees, Summary, Complete



5. Within the ‘Select Date’ tab, enter in the week ending date for the CPR and the Payroll Number. And all other information needed/required.
    a. If it is already populated and appears to be grayed out, this is because you have already submitted a CPR for this project previously. eComply will add the next week ending date once you have already submitted a CPR for that project.
6. From the “Select Date” tab/CPR Wizard you will define your the CPR submittal:
    a. To submit a Non-Performance put a check‘Non-Performance CPR’.

b. If you are submitting your last CPR for this project, check the 'Last CPR' box.
c. The 'Upload CPR Data' option is to load a preconfigured accounting system export file to upload into eComply.
    i. *Note:* The Uploading of a CPR using this feature will need to be configured. Contact support@ecomplysolutions.com for assistance!

7. Select 'Next' to move to the 'Employee' tab > Select 'Add Employees' to the right.
8. For each employee that you will be reporting payroll for, select a check mark next to their name.
    a. *Note:* If any employee worked more than 1 classification for this reporting period, you will need to enter the number of classifications on the right-hand side. This will allow you to create additional entries within the CPR for that employee and report each classification + the hours worked under each classification, etc.
9. Select 'Add Employees'



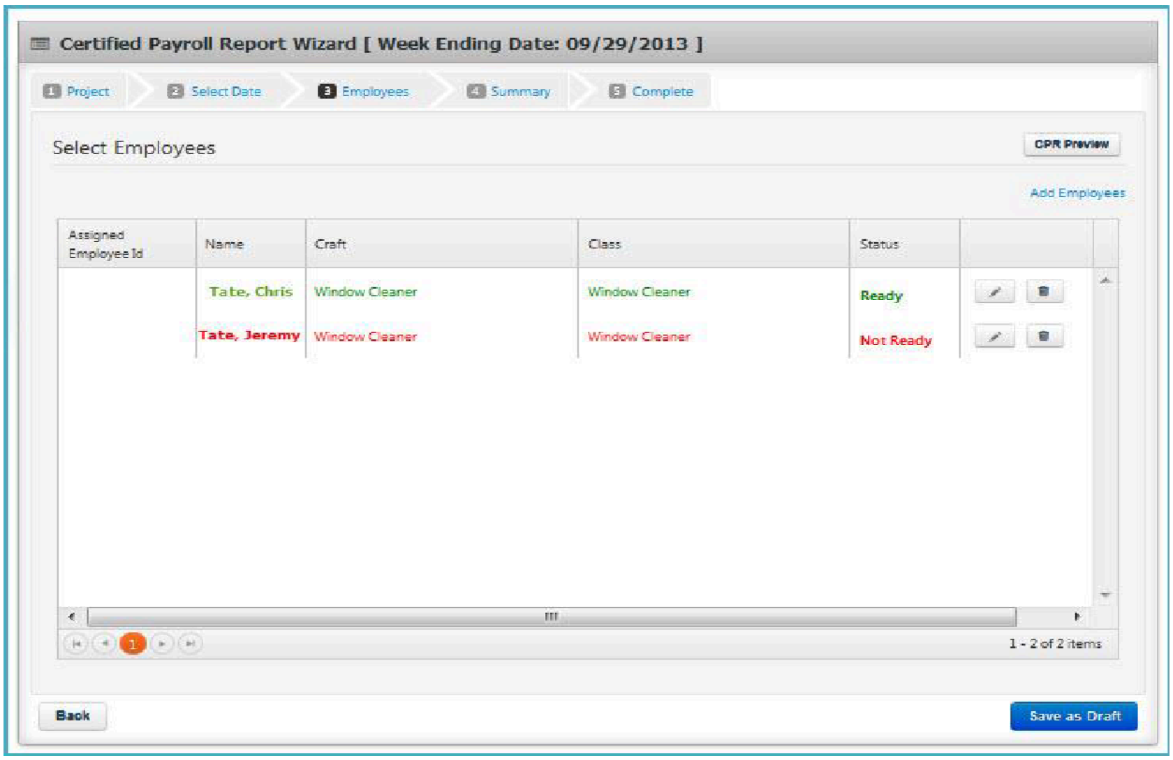
10. The employees listed will be in red font = the employee's payroll information is not complete.
    a. To add any information needed click on the pencil icon to the right of the employee.

11. The information previously created for the employee profile and fringe benefit package will populate here. Verify the information is correct.
12. Enter any hours worked.
13. Enter in the standard deductions for the employee i.e. Federal/State taxes, etc.
14. Enter the Gross Wages.

15. Enter the Check Number (this is an alpha numeric field, if direct deposit, enter DD).

-You may select '<u>Save as Draft</u>' in the lower right-hand corner if you need to leave and return later.
-You may select '<u>CPR Preview</u>' in the top right to see how your CPR will appear when submitted. Only those employees that are in green font will appear in the preview.

16. Select 'Save' when all information has been entered
    a. You will be brought back to the CPR Wizard "Select Employee" screen. You will see the employee you entered payroll information for is now in green font.



17. Repeat for each employee on the CPR.
    - To remove an employee from the current CPR, click on the '<u>trash can</u>' icon.
    - Verify the information before submitting the CPR.
18. Select 'Next' to proceed and submit the CPR
19. The Statement of Compliance screen will now appear.
    a. Put a check in "Box 4a" or "Box 4b" depending on the type of fringe benefits the employees on CPR receive.

20. Go to the bottom of the screen to select the 'Sign' link to apply your electronic signature. The system will prompt you to enter in your name as it is seen on the screen.

    Note: This prompt will represent your electronic signature. Please do not give out your username/password information. Any user authorized to submit CPRs should have their own username.

    a. Once your electronic signature is entered, you should see your actual signature on the Statement of Compliance.

21. Select 'Submit' to be taken to the CPR Management screen.
    a. To view the CPR, select your company name under the project you just submitted a CPR for
    b. Click on the 'Action' drop down. You can view the actual CPR you submitted or View History of the CPR.
    c. Select the 'disk icon' to export/print (redaction options shown as well).
        i. To export multiple payrolls, you can go to Standard Reporting> Multiple Batch Export CPR

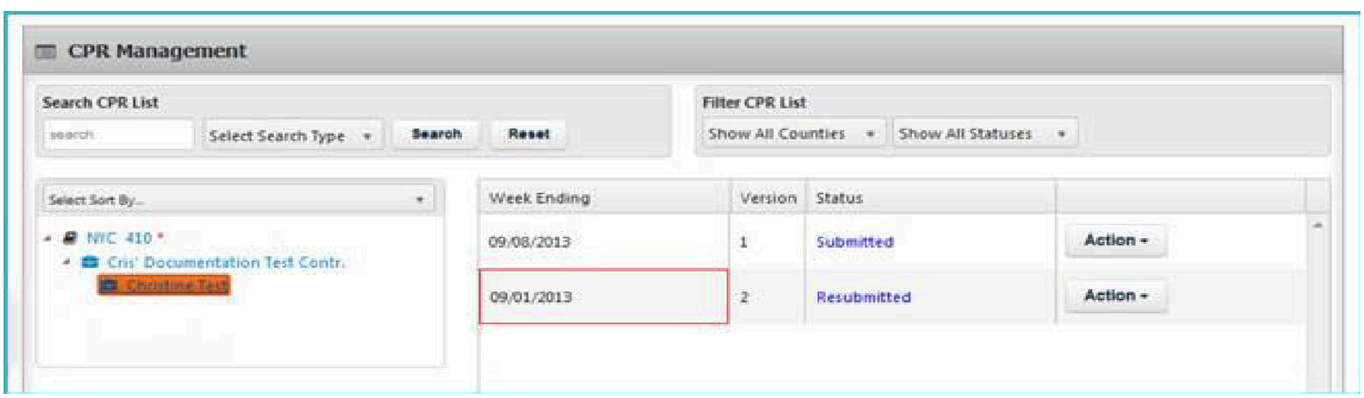
Reviewing of Certified Payroll Reports

Review Subcontractors Certified Payroll Reports:

Verify with your agency administrator if Payrolls that are compliant will be auto accepted! If there is a non-compliance found, you will know which firms' payroll(s) need your attention by either viewing the dashboard page upon login or by going to manage CPR's as shown below:

1. Locate the left side menu tabs 'Activities' | 'Setup' > Under Activities, select 'Certified Reports' > Manage CPRs
2. You will see an expanded list that allows you to view the contractors and subcontractors. Select the contractor whose CPR you want to view by clicking on the contractor's company name.

    - If there is an asterisk (*) next to the contractor's name, this means there are new CPRs that **need review**.
    - A **non-compliant** CPR will be outlined with a red box on the week ending date, for the GC/Agency as seen above.
    - Details for previous CPR version(s) can be viewed by clicking on 'Action' > '**View History**'



1. To **View a Payroll Report**, click on the “Action” button and select the ‘View CPR’ option. This will bring up the certified payroll for you to review.
2. **Non-compliant employee(s)** are highlighted, click the highlighted employee to see additional information regarding the non-compliance(s).
    a. If multiple employees are non-compliant the next page will show issues for all of them.
    b. Clicking the *highlighted employee* will open a new window called Prevailing Wage Determination (PWD) Comparison (shown below), to indicate what the non-compliance is. If wage related it will show the underpayment per day/ week, other messages may appear at the bottom for other non-wage related issues i.e ratio, etc.

PREVAILING WAGE DETERMINATION COMPARISON

☐ CONTRACTOR ☒ SUBCONTRACTOR
Name: Contractor Two

CONTRACTOR'S LICENSE NO.: 12a
SPECIALITY LICENSE NO.:

ADDRESS:
811 Plum Rd, Jackson, MO 61101

PAYROLL NO.
10

FOR WEEK ENDING
08/02/2014

SELF-INSURED CERTIFICATE NO.:
WORKERS' COMPENSATION POLICY NO.: 101

PROJECT OR CONTRACT NO.: 10
PROJECT AND LOCATION: 135th St Improvements
1152 Main St., Kansas City, Jackson 64146

TIME	27/Sunday				28/Monday				29/Tuesday				30/Wednesday				31/Thursday				01/Friday				02/Saturday				
	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	HOUR WORK	RATE OF PAY	RATE OF FB	WAGE	Total
Carlos Simon 490061860									HEAVY - CEMENT MASON Cement Mason																				
RT	0.00	0	0.00	0.00	8.00	20.00	15.00	280.00	8.00	20.00	15.00	280.00	8.00	20.00	15.00	280.00	0.00	0	0.00	0.00	0.00	0	0.00	0.00	0.00	0	0.00	0.00	840.00
Total	0.00			0.00	8.00			280.00	8.00			280.00	8.00			280.00	0.00			0.00	0.00			0.00	0.00			0.00	840.00
RT	0.00	0.00	0.00	0.00	8.00	29.24	14.38	348.96	8.00	29.24	14.38	348.96	8.00	29.24	14.38	348.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1046.88
Total	0.00			0.00	8.00			348.96	8.00			348.96	8.00			348.96	0.00			0.00	0.00			0.00	0.00			0.00	1046.88
Diff				0.00				-68.96				-68.96				-68.96				0.00				0.00				0.00	-206.88

Compliant Result :

Type	Message
Compliancy Issue	28/Monday RT Regular Time rate is non-compliant.
Compliancy Issue	29/Tuesday RT Regular Time rate is non-compliant.
Compliancy Issue	30/Wednesday RT Regular Time rate is non-compliant.

Legend: As Reported Prevailing Wage Rate Non-Compliant

Close

3. When confirmed non-compliant, close the PWD window, click ‘Reject’ on the CPR, enter remarks, and click ‘Submit’.
    a. This will show the CPR as ‘Rejected’ and the contractor will receive notification via email of rejection (project, week ending date, and remarks).
    b. The contractor will now have an additional option ‘Modify’ and can update/resubmit.
    Note: The system does a CPR evaluation each time a submission occurs; if still non-compliant it will show the highlight(s) again, if all is now compliant it will be auto accepted.

Training Videos & Important Notes

Once logged in, navigate to 'Activities' > 'Support' > 'Training Videos' to watch step-by-step instructions on the below eComply functionalities

Note - All videos available may not apply to your organization.

Video's Available:

1) **Adding or Editing An Employee**
   a) *There is a CORE employee csv template you can use to import your employees, for this template please request via support@ecomplysolutions.com*
   b) *If your payroll software interface is set up to upload, you can also use a payroll file to import employee information by selecting the import 'CPR template' option.*
   c) *If the employee is an Apprentice, you will need to first provide the apprenticeship certificate.*
   d) *Employees cannot be deleted from the system, but their status can be changed to be inactive in their employee profile, when necessary, by going into their profile (clicking on the pencil icon to the right-hand side of their name) and unchecking the 'Is Active' field.*
   e) *Apprentice certifications MUST first be submitted before you can add that employee to a certified payroll.*
2) **Assigning Sub Contractor**
3) **Bi-Weekly Payroll Submission Training Video**
4) **CHR Submission Training Video**
5) **Creating Fringe Benefit Package From Existing (Shortcut)**
6) **Creating Fringe Benefit Plan, Package & Define Association**
   a) *Individuals can belong to multiple packages if they work multiple classifications, applicable amounts will be shown for each classification/package associated with the CPR.*
7) **Employee Import**
8) **Logging Payment**
9) **Paid Holiday Training**
10) **Rejected CPR - Modify vs. Adjustment**
11) **Rejected CPR - See Rejection Comments**
12) **Selecting Crafts and Classifications**
13) **Submit A CPR**

a) *You will not report until you have the first CPR to submit. Your first submission must be a Certified Payroll, it cannot be a Non-Performance report.*
b) *The "Upload CPR Data" option is the use of a preconfigured accounting system export file to upload into eComply. This feature will need to be configured. Please contact Support at support@ecomplysolutions.com for assistance.*
c) *If any employee worked more than 1 classification for this reporting period, or had a rate change mid-week, you will need to enter the number of entries you need on the right-hand side under the 'No. of Classifications' column. This will create that # of entries on the CPR for that employee so you can report each with the classification, hours, rate, etc under each entry.*
d) *There are multiple sections to the 'Hours Worked'. Please be sure to correctly document any overtime etc. Any Other Deductions or Other Payments the employee receives will need to be added to those sections.*
e) *On the 'Statement of Compliance' you will need to put a check in "Box 4a" or "Box 4b" depending on the type of fringe benefits the employees on CPR receive.*
f) *Please do not give out your username/password information. Any user authorized to submit CPRs should have their own username.*
g) *If there is an asterisk (*) next to the contractor's name, this means there are new CPRs needing to be reviewed.*
h) *A non-compliant CPR will be outlined with a red box*
i) *If the CPR has been resubmitted, the "Status" column will identify it as 'resubmitted'. Details for the previous CPR(s) can be viewed by clicking on "Actions">" View History." "View CPR" options available from the history will be previously submitted CPR(s).*

14) Submit A CPR (English Subtitles)

15) Submit A CPR (Spanish Subtitles)

16) Submitting A Non-Performance

17) Uploading Documentation