PSWA

Employers Guide to Online Reporting

Employee Contributions Made Easy

PSWA pacific southwest administrators

Using internet Explorer or Firefox, you can log into WebERF to report contributions.

Enter the WebERF URL https://l831.review.weberf.com/ in your web browser's address bar. This will open the Terms of Use. To continue you must click on I Agree tab.

local union 831

Terms of Use

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This website contains a summary of the rights and benefits that pertain to you under each Plan. In the event of any difference between this website and the actual provisions of the Plan(s), the Plan(s) will govern. The Plan(s) are available from the Plan Administrator.

Please note that benefit information is subject to verification and updating. The Board of Trustees of the Fund(s) retains sole authority to interpret or amend the terms of the Plan(s) or benefits. To avoid confusion, note the date through which the information provided is current. If you believe the information is inaccurate, notify the Plan Administrator as soon as possible. Obtain confirmation of the information from the Plan Administrator before making decisions affecting your benefits.

This website is not intended to provide you with financial counseling or tax advice. You should consult your own advisers for guidance on when to retire and when making other important financial decisions.

If you have any questions or concerns about any of the data and/or information at this website or wish to obtain a copy of the Plan document(s), please contact the Plan Administrator.

Pacific Southwest Administrators (PSWA)
4399 Santa Anita Avenue, Suite 200 * El Monte, CA 91731
Office Hours: Monday - Friday, 8:00 a.m. to 5:00 p.m. (PST)
Phone: (626) 279-3072 * Toll Free: 1(800) 719-8963

I Agree

*Google has dropped support many 3rd party plug-ins. The pdf files created by WebERF are not supported on Google Chrome.

Site Login

On the **SITE LOGIN** page, enter your **UserID** and **Password** in their respective fields. Now click the **SUBMIT** option to continue to the **WEBERF HOME** page.

A **UserID** and **Password** will be provided to you for your initial login. You can change both your **UserID** and **Password** to make them easier to remember.

Changing Your User ID and Password

When you login to the **WEBERF HOME** page for the first time, you will be prompted to change your password.*

It is recommended to change your password right away. If you choose to not change your password at this time, you will be prompted to change it every time you log into the **WEBERF HOME** page until it is changed.

*If your web browser has a pop-up blocker enabled, you will not see the initial **CHANGE PASSWORD** pop-up. You can still change your password by allowing this website to open pop-ups on your web browser, or by clicking the Change User ID/Password hyperlink on the right hand side of the **WEBERF HOME** page.

WebERF Home Page

On the **WEBERF HOME** page, you have many tools and options at your finger tips

Create New Report: Click on this link to create a new report.

View List of Pended and Finalized Reports: This link lets you view all past and current unfinished and finalized reports.

Employer Administrative Reports: This link allows you to view all contribution reports you have completed online.

Add/Edit Projects: This link allows you to view all projects that are setup on your account.

Announcements: At the bottom of the page, there are global and personal announcements that are general or specific for your account.

Creating a New Report

To create a new report, click on the **Create New Report** hyperlink. This will take you to the **PROCESSING OPTIONS** page.

Processing Options

In the **PROCESSING OPTIONS** page, you will need to choose the Reporting Period you will be reporting by clicking on **change**.

From this page you can have various options to help you modify and simplify your report.

Agreement: Allows you to select the agreement for the type of work you will be reporting (only applicable if you have various types of agreements: I.e., Exhibit Builders, Sign Installation, Tradeshow Installers, etc.)

Report Type: You will need to select a report type, **Regular** for report with hours or **No Employee*** for a report with no employees worked for that month.

Data Source: This option allows you to select how you want to start your report.

> **Prelist**: Uses information from the last report you have submitted

> **Blank Form**: Starts a blank form with no data.

> **Import File:** Allows you to import data from a reporting program you may already use or from Excel.

> **Employer Report Form ID:** This allows you to add your own custom name for easily identifying this report.

Agreements that you are required to report will be listed under **Agreement.** This also gives you information if you have **Not Reported** or have **finalized** any reports.

Select and click on the **Agreement** option you will be reporting.

General Reporting Information

ZZZ Test Employer

Create/Edit Report

Employer ID: 900000
Contractor: ZZZ Test Employer
Address 1: 4399 Santa Anita Ave., #150
Address 2:
Address 3:
City, State, Zip Code: El Monte, CA 91731
Phone: Ext:
Fax:

Federal ID Number: null
Report Period: 04/01/2017
EDI Reference Number: Report Not Yet Finalized
Agreement: Tradeshow Installers (STANDARD-CBA) - Current Rates

Job Class Type: All

| Clr Form | Remove | Save | Delete Rpt | Pend | Calculate |

Employer Notes (maximum of 250 characters)

Set Defaults

Job Class
Entry Journeyman ▼

Employees (fields marked with an asterisk ("*") are required) ☐ 1st Report in Area ☐ Last Report in Area ☐ Supplemental Report

SSN*	Last Name*	First Name*	MI	Job Class	Hours*	Wages*	Dues	VAC	PAC	Remove
					0.00	0.00				☐
					0.00	0.00				☐
					0.00	0.00				☐
					0.00	0.00				☐

In the **CREATE/REPORT** page, you will have to enter all the required information that is marked with an asterisk **(*)**.

Report Editing Options

ZZZ Test Employer

Create/Edit Report

Employer ID: 900000
Contractor: ZZZ Test Employer
Address 1: 4399 Santa Anita Ave., #150
Address 2:
Address 3:
City, State, Zip Code: El Monte, CA 91731
Phone: Ext:
Fax:

Federal ID Number: null
Report Period: 04/01/2017
EDI Reference Number: Report Not Yet Finalized
Agreement: Tradeshow Installers (STANDARD-CBA) - Current Rates

Job Class Type: All

[Clr Form] [Remove] [Save] [Delete Rpt] [Pend] [Calculate]

Employer Notes (maximum of 250 characters)

Set Defaults

Job Class
[Entry Journeyman ▾]

Employees (fields marked with an asterisk ("*") are required) ☐ 1st Report in Area ☐ Last Report in Area ☐ Supplemental Report

SSN*	Last Name*	First Name*	MI	Job Class	Hours*	Wages*	Dues	VAC	PAC	Remove
222-22-2222	Stewart	Rod		Entry Journeyman	80.00	2141.60	73.6	162.4		☐
111-11-1111	White	Barry		Certified Journey	120.00	4359.60	110.4	331.2		☐
					0.00	0.00				☐

The options on this page can help you edit your report in many ways.

Clr Form: allows you to completely clear all the information you have entered without deleting the report.

Remove: allows you to remove a single line of information on the report form after clicking on the small **Remove** box next to the **Term Date** field

Save: Allows you to save the current information you have entered on the report form.

Once you are done adding/editing this information, there are three ways to handle the report:

Delete Rpt: Deletes the entire form for the work period you selected.

Pend: Pends your report for future editing/adding of information you have added.

Calculate: Calculates the contribution amounts you will need to submit to the Trust Fund for this report. Clicking this option also sends you the final steps of your online report.

Computation of Payment

Do you want to open or save **WebERF.pdf** (16.5 KB) from **l831.review.weberf.com**?

Open   Save ▼ Cancel

A message will pop up asking to open or save. Select Open.

Local 831 Trust Funds
P.O. Box 5528
El Monte, CA 91734-1528

ZZZ Test Employer

Employer ID:	900000	Federal ID Number:	
Contractor:	ZZZ Test Employer	Report Period:	04/01/2017
Address:	4399 Santa Anita Ave., #150	EDI Reference Number:	Report Not Yet Finalized
	El Monte, CA 91731	Agreement:	Trade (STANDARD - CBA) - Current Rates
Phone:	Ext:		Tradeshow Installers
Fax:		Report Type:	Regular
		Job Class Type:	All

☐ 1st Report In Area   ☐ Last Report In Area   ☐ Supplemental Report

Employees

No.	SSN	Last Name	First Name	MI	J/C	Hours	Wages	Dues	VAC	PAC
1	222-22-2222	Stewart	Rod		EJNP	80.00	2,141.60	73.60	162.40	0.00
2	111-11-1111	White	Barry		CJNP	120.00	4,359.60	110.40	331.20	0.00
			Totals:			200.00	$ 6,501.20	$ 184.00	$ 493.60	$ 0.00
			Grand Totals:			200.00	$ 6,501.20	$ 184.00	$ 493.60	$ 0.00

ID	J/C	Hours	Wages	H&W H1	Pen	Dues	Appr	VAC	Pen S	LMC	LMCI
900000	CJNP	120.00	4,359.60	9.2000	5.3000	0.9200	0.6400	0.0760	1.9000	0.0900	0.0400
				1,104.00	636.00	110.40	76.80	331.20	228.00	10.80	4.80
900000	EJNP	80.00	2,141.60	9.2000	5.3000	0.9200	0.6400	0.0760	1.9000	0.0900	0.0400
				736.00	424.00	73.60	51.20	162.40	152.00	7.20	3.20
Grand Totals:		200.00	$ 6,501.20	$ 1,840.00	$ 1,060.00	$ 184.00	$ 128.00	$ 493.60	$ 380.00	$ 18.00	$ 8.00

ID	J/C	FTI	Totals
900000	CJNP	0.0300	
		3.60	2,505.60
900000	EJNP	0.0300	
		2.40	1,612.00
Grand Totals:		$ 6.00	$ 4,117.60

The **COMPUTATION OF PAYMENT** page provides a complete and thorough breakdown of the contributions you will need to submit based on a number of categories (i.e., contributions by job class, trust fund, etc.). This page also shows the total contribution amount you will need to submit. Close the window

Home | Select Employer | Create New Report | Reports List | Contact Us | Documentation | Help | Logout

ZZZ Test Employer

Computation of Payments

Payment Coupon   Edit   Delete Rpt   Pend   Finalize

Finalizing your Report

To finalize your report, you will need to click the **FINALIZE** option. Window will pop-up giving details to of Payment. Click on Finalize option to complete transaction.

Message will pop up advising a report cannot be modified after it has been 'finalized'. Click on OK to complete Report Form.

Message will pop up asking to open or save. Select open.

Computation of Payments

Local 831 Trust Funds
P.O. Box 5526
El Monte, CA 91734-1526

ZZZ Test Employer

Employer ID: 900000
Contractor: ZZZ Test Employer
Address: 4399 Santa Anita Ave., #150
El Monte, CA 91731
Phone: Ext:
Fax:

Federal ID Number:
Report Period: 04/01/2017
EDI Reference Number: 0001-5019-4605-4345
Agreement: Trade (STANDARD - CBA) - Current Rates
Tradeshow Installers

Report Type: Regular
Job Class Type: All

☐ 1st Report In Area   ☐ Last Report In Area   ☐ Supplemental Report

Employees

No.	SSN	Last Name	First Name	MI	J/C	Hours	Wages	Dues	VAC	PAC
1	222-22-2222	Stewart	Rod		EJNP	80.00	2,141.60	73.60	162.40	0.00
2	111-11-1111	White	Barry		CJNP	120.00	4,359.60	110.40	331.20	0.00
			Totals:			200.00	$ 6,501.20	$ 184.00	$ 493.60	$ 0.00
			Grand Totals:			200.00	$ 6,501.20	$ 184.00	$ 493.60	$ 0.00

ID	J/C	Hours	Wages	H&W H1	Pen	Dues	Appr	VAC	Pen S	LMC	LMCI
900000	CJNP	120.00	4,359.60	9.2000	5.3000	0.9200	0.6400	0.0760	1.9000	0.0900	0.0400
				1,104.00	636.00	110.40	76.80	331.20	228.00	10.80	4.80
900000	EJNP	80.00	2,141.60	9.2000	5.3000	0.9200	0.6400	0.0760	1.9000	0.0900	0.0400
				736.00	424.00	73.60	51.20	162.40	152.00	7.20	3.20
Grand Totals:		200.00	$ 6,501.20	$ 1,840.00	$ 1,060.00	$ 184.00	$ 128.00	$ 493.60	$ 380.00	$ 18.00	$ 8.00

ID	J/C	FTI	Totals
900000	CJNP	0.0300	
		3.60	2,505.60
900000	EJNP	0.0300	
		2.40	1,612.00
Grand Totals:		$ 6.00	$ 4,117.60

Your report will now have an EDI Reference Number indicating transaction is now complete. Computation of Payments will give the Details of the Employees.   Close the window

ZZZ Test Employer   Payment Coupon

Computation of Payments

Computation of Payment. Select Payment Coupon.

ZZZ Test Employer   Computation of Payments

Payment Details

Do you want to open or save **WebERF.pdf** (16.5 KB) from **l831.review.weberf.com**?   ☒

[Open]   [Save ▼]   [Cancel]

Payment Detail – message will pop up asking to open or save. Select open. Payment coupon will appear.

Payment Coupon

Payment Coupon for ZZZ Test Employer

Employer ID: 900000
Contractor: ZZZ Test Employer
Address: 4399 Santa Anita Ave., #150
El Monte, CA 91731
Phone: Ext:
Fax:
Contractor License:
Business Type:

Federal ID Number:
Report Period: 04/01/2017
EDI Reference Number: 0001-5019-4605-4345
Agreement: Trade (STANDARD - CBA) - Current Rates
Tradeshow Installers

Report Type: Regular
Job Class Type: All

Date Report Finalized: 08/05/2017

ID	J/C	Hours	Wages	H&W H1	Pen	Dues	Appr	VAC	Pen S	LMC	LMCI
900000	CJNP	120.00	4,359.60	9.2000	5.3000	0.9200	0.6400	0.0760	1.9000	0.0900	0.0400
				1,104.00	636.00	110.40	76.80	331.20	228.00	10.80	4.80
900000	EJNP	80.00	2,141.60	9.2000	5.3000	0.9200	0.6400	0.0760	1.9000	0.0900	0.0400
				736.00	424.00	73.60	51.20	162.40	152.00	7.20	3.20
Grand Totals:		200.00	$ 6,501.20	$ 1,840.00	$ 1,060.00	$ 184.00	$ 128.00	$ 493.60	$ 380.00	$ 18.00	$ 8.00

ID	J/C	FTI	Totals
900000	CJNP	0.0300	
		3.60	2,505.60
900000	EJNP	0.0300	
		2.40	1,612.00
Grand Totals:		$ 6.00	$ 4,117.60

REPORT DUE ON THE 10th OF THE MONTH

Be sure to include the EDI Reference Number 0001-5019-4605-4345 in the Memo portion of check(s).

Make Payment(s) As Follows:

Payment	Date	Amount Due	Payable To	Instructions	Mail To
Check #1		$ 4,117.60	Local Union 831 - Trust Funds	Send payment and copy of the report.	Local Union 831 - Trust Funds P O Box 513435 Los Angeles, CA 900513435 626-279-3072

Signature _____

☐ 1st Report in Area   ☐ Last Report in Area   ☐ Supplemental Report

Print Your Name _____

Once you have finalized the report, you will need to click the **Payment Coupon** option. The Payment Coupon is the breakdown of contribution you will need to print and mail to Local Union 831 – Trust Funds.

Note: you must always finalize your report once you are ready to send payment. This step will move your report into a permanent file. Once you finalize your report, you will not be able to change that report.

If you need to make an adjustment on a finalized report, contact the Trust Fund Office.

If You Have No Employees To Report

The same steps are used to file a no employees worked.

If you have no hours to report, click on, **NCH** and you will get a pop up asking "Do you want to create a No-Craft –Hired report for this agreement?" By clicking on OK the system will generate a "**No Employees**" report form.
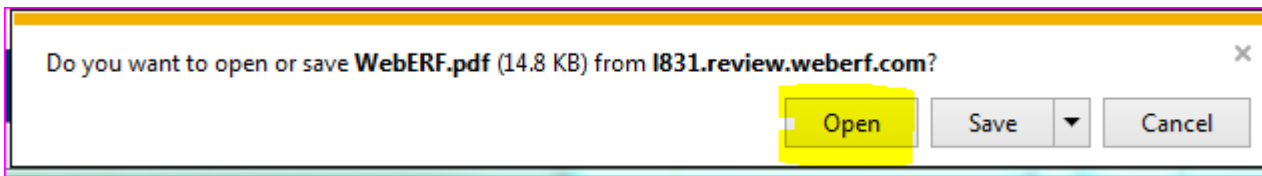
A messaage will appear asking to open or save. Select Open

Review window opens. Close window

Computations of Payments window will open. Select Finalize

Select Finalize

A message will pop up stating the report cannot be modified after it has been finalized. Select ok

Do you want to open or save **WebERF.pdf** (14.8 KB) from **I831.review.weberf.com**?

Open   Save ▼   Cancel

A message will pop up asking to open or save. Select open.

Local 831 Trust Funds
P.O. Box 5528
El Monte, CA 91734-1528

ZZZ Test Employer

Employer ID:	900000	Federal ID Number:	
Contractor:	ZZZ Test Employer	Report Period:	04/01/2017
Address:	4399 Santa Anita Ave., #150	EDI Reference Number:	0001-5019-4698-4899
	El Monte, CA 91731	Agreement:	Trade (CLEAN SERVICE - CBA) - Current Rates
Phone:	Ext:		Tradeshow Installers
Fax:			
		Report Type:	No Employees
		Job Class Type:	All

☐ 1st Report In Area   ☐ Last Report In Area   ☐ Supplemental Report

The EDI number has been assigned to this report. Close window

ZZZ Test Employer

Computation of Payments

Payment Coupon

Computation of Payment window will open. Select Payment Coupon

Do you want to open or save **WebERF.pdf** (15.3 KB) from **I831.review.weberf.com**?

Open   Save ▼   Cancel
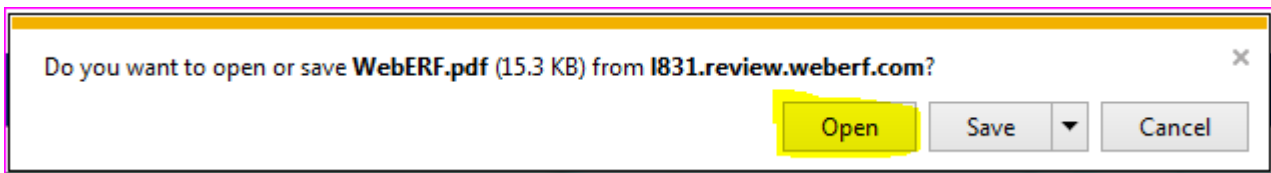
A message will pop up asking to open or save. Select open.

Coupon for No Employees Reported

Payment Coupon for ZZZ Test Employer

Employer ID:	900000		**Federal ID Number:**	
Contractor:	ZZZ Test Employer		**Report Period:**	04/01/2017
Address:	4399 Santa Anita Ave., #150		**EDI Reference Number:**	0001-5019-4698-4899
	El Monte, CA 91731		**Agreement:**	Trade (CLEAN SERVICE - CBA) - Current Rates
Phone:	Ext:			Tradeshow Installers
Fax:			**Report Type:**	No Employees
Contractor License:			**Job Class Type:**	All
Business Type:				
			Date Report Finalized:	08/05/2017

REPORT DUE ON THE 10th OF THE MONTH
Be sure to include the EDI Reference Number 0001-5019-4698-4899 in the Memo portion of check(s).

Make Payment(s) As Follows:

Payment	Date	Amount Due	Payable To	Instructions	Mail To
Check #1		$ 0.00		Send payment and copy of the report.	Local Union 831 - Trust Funds P O Box 513435 Los Angeles, CA 900513435 626-279-3072

Signature _____   ☐ 1st Report In Area   ☐ Last Report In Area   ☐ Supplemental Report

Print Your Name _____

Mail Payment Coupon to Local 831 – Trust Funds.

Viewing Pended and Finalized Reports

WebERF offers simple online ways to keep track of all reports created.

To view any pended or finalized reports yu have created, click the **View List of Pended and Finalized Reports** link on the WebERF Home page, this will take you to the **Available Reports** page.

On the Available Reports page, you will see two lists. On the left you'll see all unfinished reports you have created, and on the right you'll see all finalized reports.

Clicking the **[Del]** link under the **Unfinished Report** list will delete any pended reports. You cannot delete any finalized reports as the system will not allow you.

Clicking on the link of any unfinished report will send you to the report form of that work period so it can be edited or finalized.