













# What can you expect with the system changeover?

- In future, you will be able to view and maintain all data relating to your company and your employee via the employer online service, as well as submit monthly reports.
- Your employees' entitlements can be viewed with a single click.
- > Any missing data will be marked with this icon.



- You can directly access an overview of the contributions to be paid or the available credit balance.
- You can retrieve letters from us directly in your digital mailbox.

\* Initial registration



#### Registration

- You have received the registration details from us by email or post
- Use these to register on our customer portal for international employers
- During the registration process, you will assign yourself
  - a username and
  - a password
- You will also need to answer a security question. You will need this when resetting your password
- Once you have successfully registered, you can log in to the customer portal and start working



## **Registration process - diagram**

You will receive a security code by email/post

Open the website or click on the link in the email

Click on the "register now" button

SOKA-BAU Enter your employer's ID number and Schön, dass Sie unser kundenportal nutzen möchten. Mit wenigen Klicks können Sie nun security code and Für Ihre Registrierung brauchen Sie click on "confirm"

1 Identität prüfen

? Hilfe benötigt?

JETZT REGISTRIEREN

**Daten eingeben** 

**Unser Zeichen** 

The data will be displayed in summary form. You must confirm your entries. **Thereafter** your registration is completed.

Anrede 🗸	
Vorname	Nachname
E-Mail-Adresse	
	erung ein.
tte geben Sie hier ihre Daten für die Registri Benutzername Passwort	Passwort wiederholen ©
Benutzername	

Then enter your data. Set up a user name and a password. Select and answer the security question.

Herzlich Willkommen

Ihre Registrierung abschließen.

 Unser Zeichen Den Sicherheitsco

D	rei Schritte bis zur Anmeldung in Ihrem Kundenportal der SOKA	N-BAI
	Identität prüfen	
	Unser Zeichen eingeben	
	Unser Zeichen — 1234994321	) (i
	Sicherheitscode eingeben	
	Sicherheitscode — WS16CFNP	(i

SOKA-BAU

2 Daten eingeben

3 Daten prüfen



Access to the customer portal

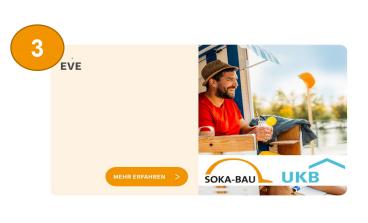


# Log in to the customer portal

- Go to our customer portal
- 2 Enter your login details
- The login screen will open









#### **Start screen - Overview**

#### Meldungen

Sie haben nicht für alle Arbeitnehmer Meldungen abgegebene. Bitte übermitteln Sie uns die fehlenden Meldungen.





#### **Mein Betrieb**

 Bitte prüfen Sie die markierten Felder und vervollständigen Sie die Daten.

ZU IHREN BETRIEBSDATEN



#### **Arbeitnehmer**

• Bitte prüfen Sie die markierten Felder und vervollständigen Sie die Daten.

ZU IHREN ARBEITNEHMERN



#### **Konto**

>



#### Reports

Viewing, submitting monthly reports and correction reports

#### My company

 Everything related to your company, e.g., master data, contact details

#### **Employees**

 Everything related to employees, e.g., master data, overview of remaining entitlements

#### Account

- Overview of your account, e.g., view of outstanding leave fund contributions
- U Shows you areas, which are still incomplete





\* "My company" tile

\* Authorisation of a service provider



### "My Company" tile

Here you can enter your company details and approve the service provider authorization.

#### **Mein Betrieb**

Firmendaten (!)

**Adressdaten** 

Kontaktdaten (!)

Bankdaten (

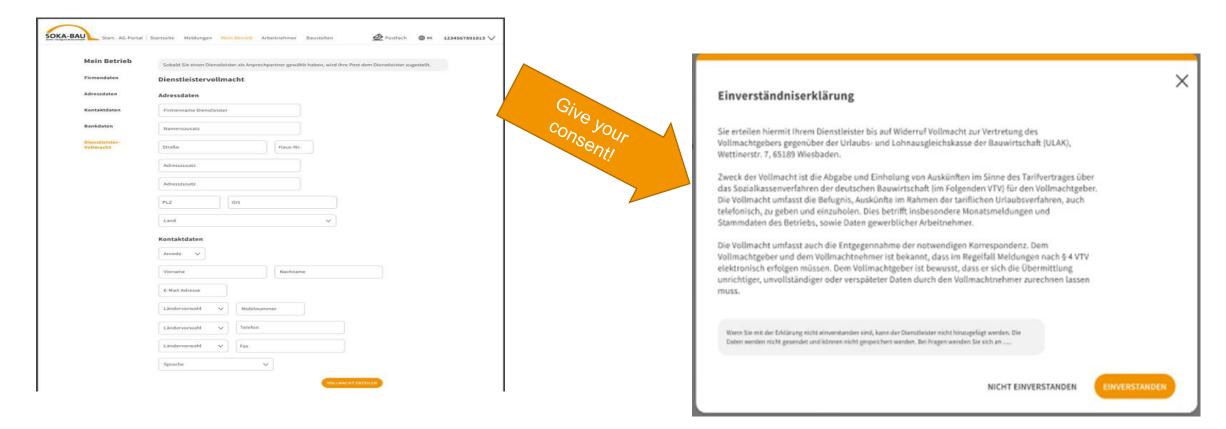
Dienstleister-Vollmacht

- In the "Company data" section, you can enter your country, tax number, managing director and activity
  - Please note: You cannot change your company name. To do so, please contact your customer advisor.
- The address is maintained in the "Address data" section.
- The "Contact Data" section is, where you enter your email address, telephone numbers, and a contact person
- The bank details are entered in the "Bank details" section
- In the 'Service provider authorisation' section, you can authorise your service provider



#### **Authorisation of service providers I**

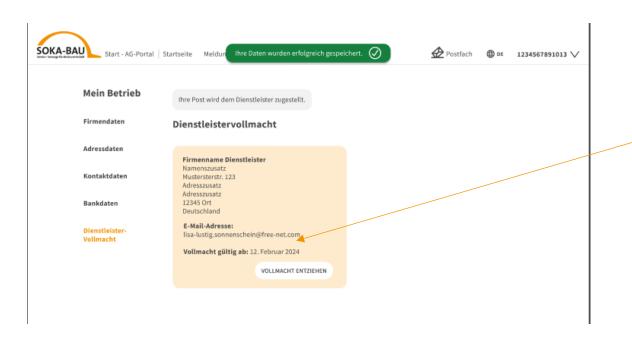
- Do you have a tax accountant, similiar service provider or someone who will be submitting reports on your behalf? Then
  you must authorise that service provider via the customer portal
- Under the heading "Service provider authorisation" enter the details of your service provider only and click on the "grant authorisation" button → in the next window, you must give your consent.





#### **Authorisation Service Provider II**

After you click on the "Agree" button, the following screen will appear



 You can revoke the power of attorney at any time by clicking on the "Revoke power of attorney" button

- SOKA-Bau will then process the authorisation
- Your service provider will receive their registration data from us and will be able to submit the data for your company
- Please note that in this case, we will only be contacting your service provider personally. However, you and your service provider will still be able to access your electronic mailbox.





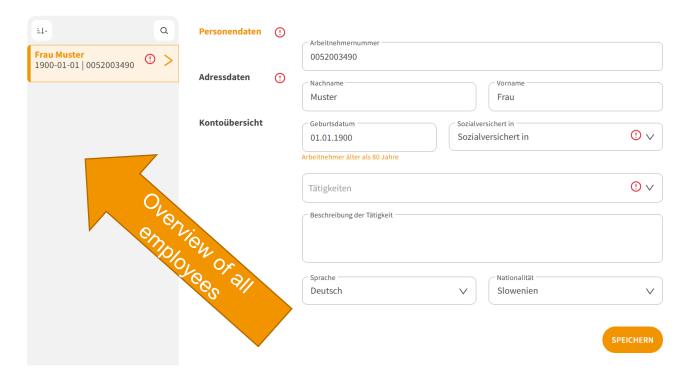
\* "Employees" tile



### "Employees" tile

Here you can maintain your employees' master data.

#### **Arbeitnehmer**



- In the "Personal data" section, you can maintain the employee's last name, first name, date of birth, social security country, occupation, language and nationality
- The address is maintained in the "Address data" section
- In the "Account overview" section, you can see the employee's entitlements (current year, previous year, and year before last).





\* "Reports" tile



#### "Reports" tile

- Monthly reports are entered via the "Reports" tile
- Monthly reports are submitted directly via the customer portal
- Requirements set forth in the collective agreements remain unchanged.
- All previous submission options are no longer available
- You can submit monthly reports in two different ways in the employer online service
  - Direct entry in the portal
  - Upload of a predefined Excel spreadsheet → Do you have many employees? Then this would be the option for you. For further information please contact your customer advisor



#### **Selection of the month**

Click on the "Reports" tile to open the following window

#### Meldungsübersicht

2023	2024	
Monatsmeld	ung Januar 2023	>
Monatsmeld	ung Februar 2023	>
Monatsmeld	ung März 2023	>
Monatsmeld	ung April 2023	>
Monatsmeld	ung Mai 2023	>
Korrekturme	eldung Juni 2023	>
Monatsmeldung Juli 2023		>
Monatsmeldung August 2023		>
Monatsmeldung September 2023		>
Monatsmeldung Oktober 2023		>
Monatsmeldung November 2023		>
Monatsmeld	ung Dezember 2023	>

#### Info:

Correction reports can only be submitted within the framework of the collectively agreed provisions.

If a report is required outside the months displayed, please contact your customer advisor.

You can now select the year and month for which you would like to submit the report or a correction



#### Enter the data for the monthly report here



- We list the employees for whom you have submitted a customs declaration in accordance with §18 AEntG
- You must provide information for all of these employees



## **Monthly reports / Correction reports – Input mask**

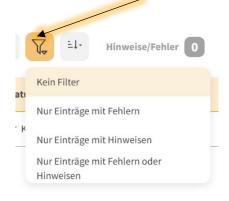
- The employees for whom a monthly report must be submitted are displayed.
- Missing employees can be added using the "add employee" button.
- The total amount of gross wages, leave days, reimbursements and the contribution to be paid are displayed at the top right.
- The report or correction report is submitted using the "submit report" button.

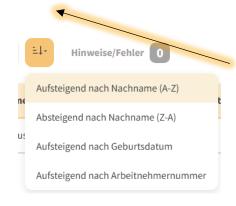




### **Monthly reports / Correction reports – Entry I**

- There have been no changes to the collectively agreed provisions governing the submission and content of monthly reports or correction reports!
- New:
  - You no longer need to specify leave days. The vacation period is sufficient; the system calculates the days automatically.
  - > The calculation of the daily rate only takes the periods up to and including the **previous month** into account
- You can use the filter icon to filter the report according to the listed criteria





You can sort according to the listed criteria using the sort icon

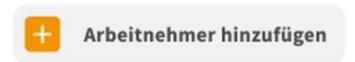
#### **Monthly reports / Correction reports – Entry II**

- During your entry of reports plausibility checks are carried out directly such as
  - Do the hours match the days of employment?
  - > Is the leave within the employment period?



• What about employees, who were not posted after all, or is he/she a site manager/foreman? If so, this must be indicated in the "Status/Comment" column

Is an employee missing from the list? You can select them using the "Add employee" button



If there are any hints/errors, these will be marked in the entry mask



Beschäftigungszeitraum



## **Monthly reports / Correction reports – Send**

- Only when all errors/hints have been successfully processed can the report be sent by using the "send report" button
- After sending the report, a pop-up window will appear.

  There you will see the contribution that you have to pay



The report will be stored in your mailbox in PDF format





Datum Betreff





\* "Account" tile



#### **Account tile**

- Within the Account tile, you can check your current account balance.
- Please contact your customer advisor if you
  - need an account statement
  - have specific questions about your account

#### **Konto**

Konteninformationen

Kontostand: 0,00 €