

Operating Engineers Local 399 Electronic Contribution Website User Manual

This guide is intended to show you the quick and easy way to enter contributions using your new contributions website. This guide will walk you through the following:

- How to process a new contribution form
- How to process payments via ACH
- How to modify a saved contribution form
- How to upload a file to the electronic contributions site using a CSV File
- How to copy/modify a previous contribution form
- How to view and delete contribution forms
- How to pay multiple saved invoices

Web Address: www.IUOE399DCEmployers.org

The screenshot displays the website for Operating Engineers Local 399. At the top left, the title "Operating Engineers Local 399" is shown. On the right, there is a "Login" section with the date "Wednesday, November 29, 2023". Below the date are two input fields: "* User Name:" and "* Password:", each followed by a text box. A "Login" button is positioned below these fields. At the bottom of the login section are two links: "Create an Account" and "Forgot Password?". A horizontal navigation menu is located below the login section, with tabs for "Home", "Electronic Contribution", "Employer Information", "News", and "Contact Us". The "Home" tab is currently selected. Below the navigation menu, the main content area is divided into two columns. The left column contains an "Introduction" section with the text: "You now have the power to access information 24 hours a day, 7 days a week." This is followed by a "To Navigate this site:" section with a bullet point: "Click on a header on the top. This opens your submenu options." Below that is a "To Log On:" section with two bullet points: "There is a login box in the upper right corner." and "Enter your User Name and Password then click on the login button." The right column contains a "News / Events" section with the text: "No news is available."

- **To log in to this site, you will need to contact the BeneSys office to register, at which point you will be mailed two separate introduction letters. These letters will contain the contractor number and identification number needed for registration. Once you have received your letters, navigate to the website and click on the “Create an Account” option in the top right corner of the website, where you will create a user name and password for your account.**
- **If you have any difficulty when creating your account, please call (248) 641-4915, where someone will assist you.**

Let's Get Started

The screenshot displays the website for Operating Engineers Local 399. At the top right, the date is Wednesday, November 29, 2023, with links for My Profile and Logout. The main header features the site title and a navigation bar with tabs for Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. The Electronic Contribution tab is active, showing a sub-menu with Process Contribution, View All Contributions, and Frequently Asked Questions. A 'News / Events' section on the right indicates no news is available. The main content area includes an introduction, navigation instructions, and login details.

Operating Engineers Local 399

Wednesday, November 29, 2023

My Profile Logout

Welcome Democontractor Last Signed In: Wednesday, November 29, 2023

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Process Contribution
View All Contributions
Frequently Asked Questions

News / Events
No news is available.

Introduction
You now have the power to ... rs a day, 7 days a week.

To Navigate this site:

- Click on a header on the top. This opens your submenu options.

To Log On:

- There is a login box in the upper right corner.
- Enter your User Name and Password then click on the login button.

If your login was successful you'll be directed to the appropriate page to begin.

If your login was invalid you'll be directed back to the login screen where you will have the chance to try again.

- **Once you have logged in, to begin entering employee contribution information, mouse over the Electronic Contribution tab and select Process Contribution as shown above.**
 - **This option will allow you to create and process contributions.**

Processing Contributions

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: [Redacted] INC

Work Start Date: 8/1/2020

Work End Date: 8/31/2020

Process Contribution: Enter New Contribution
Modify / Submit Saved Contribution
Upload Contribution File
Copy / Modify Previous Report Form

Contribution Type: [Redacted]

CBA: [Redacted]

Report no Hours

Submit Cancel

- **Enter New Contribution** – This allows manual entry of your contribution form
- **Modify / Submit Saved Contribution** – Allows you to retrieve a previously entered and saved contribution form
- **Upload Contribution File** – Allows you to upload a data file exported from your payroll system (.CSV or .TXT format) directly to the website
- **Copy / Modify Previous Report Form** – This option will allow you to retrieve a previous month's submitted contribution form and copy the information to the current month's contribution form

Entering a New Form

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us
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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: [REDACTED] INC

Work Start Date: 8/1/2020

Work End Date: 8/31/2020

Process Contribution: Enter New Contribution

Contribution Type: Regular Contribution

CBA: BTE AGREEMENTS

Report no Hours

1. Select the **Contractor**: If you only submit contributions for one contractor, that contractor will show by default and you won't have other contractors to select from. If you have a login that allows you to submit contributions for multiple contractors, click the drop-down arrow and a list of contractors you submit for will show, from which you can select the desired contractor.
2. Select a **Work Start Date** and **Work End Date**. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and end dates.
3. Select **Enter New Contribution**.
4. The contribution type should always be **Regular Contribution**.
5. Select the appropriate **CBA** based on the work you are reporting. This will pull the fringe rates for that CBA.
6. To report no work, please check the "Report no Hours" box.
7. Finally, click **Submit** to begin entry.

Enter a New Form - Contribution Entry

Contribution Batch			
Contractor Name:	[REDACTED]	Contractor Number:	[REDACTED]
Batch Number:	CW23-00000005	Work End Date:	10/31/2023
CBA:	RET - Retirement		

[Rate Inquiry](#)
 [Add Employee](#)
 [Delete Employee](#)
 [Save and Complete Later](#)
 [Calculate Contribution](#)
 [Cancel](#)

***Contact the Benefit Office to add new Work Classifications.**
Please contact the Fund Office if you need a work classification changed for a member or a member removed from your billing screen.

Row No	SSN	Work Class	First Name	MI	Last Name	Hours Worked	Gross Wages	Employee 401K	Employee Roth	Loan Payment	Weeks Worked	Delinquent True Up	Delete?
1	123456789	DEFAULT WORK CLASSIFICATION ▼	John		Doe	100.00	1000.00	100.00	100.00	0.00	0.00	0.00	<input type="checkbox"/>
2	987654321	DEFAULT WORK CLASSIFICATION ▼	Jane		Doe	200.00	2000.00	200.00	0.00	200.00	4.00	0.00	<input type="checkbox"/>
3		DEFAULT WORK CLASSIFICATION ▼				0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
4		DEFAULT WORK CLASSIFICATION ▼				0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

- This screen will typically be prepopulated with employees you have recently remitted for under the CBA you selected. It also allows you to enter new employees as well as delete employees you no longer remit for. To add a new employee, simply enter their SSN and name in the blank line at the end of the form. To delete an employee, check the delete box on that employee's line and click Delete Employee.
- Enter the Gross Wages, Employee 401K, Employee Roth, Loan Payment, Weeks Worked, and Delinquent True Up amounts in the appropriate fields if applicable.
- Click Save and Complete Later if you need to come back later to finish your contribution entry. This will save what you already input and lets you pick up where you left off.
- Once all employees' hours and wages are entered, click on Calculate Contribution, at which point the following screen will show:

Enter a New Form – Calculate Contributions

Process Contribution

Contribution Batch			
Contractor Name:	[REDACTED]	Contractor Number:	[REDACTED]
Batch Number:	CW23-00000005	Work End Date:	10/31/2023
CBA:	RET - Retirement		

Contractor Contribution Details:

Work Class	Contractor	Hours Worked	Gross Wages	Employee 401K	Employee Roth	Loan Payment	Weeks Worked	Delinquent True Up	Amount	
Default Work Classification	Test Contractor	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	\$600.00	View Details
TOTAL		300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	\$600.00	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Hours Worked	Gross Wages	Employee 401K	Employee Roth	Loan Payment	Weeks Worked	Delinquent True Up	Amount	
987654321	Default Work Classification	Jane		Doe	200.00	2,000.00	200.00	0.00	200.00	4.00	0.00	\$400.00	View Details
123456789	Default Work Classification	John		Doe	100.00	1,000.00	100.00	100.00	0.00	0.00	0.00	\$200.00	View Details
TOTAL					300.00	\$3,000.00	300.00	100.00	200.00	4.00	0.00	\$600.00	

- The [View Details](#) link under Contractor Contribution Details will show you a breakdown of all calculated fringes
- The [View Details](#) link under Employee Contribution Details will show you a breakdown of all calculated fringes for that particular employee
- Use the [Back](#) button to return to the prior screen if you'd like to adjust work details for any employee. **At no time** should you use your browser's back button to return to a previous page (back arrow in upper left corner of your browser window). This will cause all previously entered information to be lost.
- When all the information you've entered is correct, click the [Finalize Contribution](#) button. Note: once you've clicked [Finalize Contribution](#), you cannot go back and make changes.

Enter a New Form - Contractor Details

Contractor Contribution Details

Contractor Name: [REDACTED]

Fund Name	Units	Basis	Rates	Amount
EE 401K	300.00	Employee 401K	1.00000	\$300.00
SEE 401K	300.00	Employee 401K	0.00000	\$0.00
EE Roth	100.00	Employee Roth	1.00000	\$100.00
SEE Roth	100.00	Employee Roth	0.00000	\$0.00
Loan	200.00	Loan Payment	1.00000	\$200.00
S Loan	200.00	Loan Payment	0.00000	\$0.00
True Ups	0.00	Delinquent True Up	1.00000	\$0.00
				Total: \$600.00

Close

Enter a New Form - Employee Details

Employee Contribution Details

First Name: Jane **Last Name:** Doe

Fund	Units	Basis	Rate	Amount
EE 401K	200.00	Employee 401K	1.00000	\$200.00
SEE 401K	200.00	Employee 401K	0.00000	\$0.00
EE Roth	0.00	Employee Roth	1.00000	\$0.00
SEE Roth	0.00	Employee Roth	0.00000	\$0.00
Loan	200.00	Loan Payment	1.00000	\$200.00
S Loan	200.00	Loan Payment	0.00000	\$0.00
True Ups	0.00	Delinquent True Up	1.00000	\$0.00
				Total: \$400.00

Enter a New Form - Finalize Contributions

Contribution Batch

Contractor Name: ██████████ Contractor Number: ██████████
 Batch Number: CW23-00000005 Work End Date: 10/31/2023
 CBA: RET - Retirement

INVOICE # CW23-00000004

Your Calculated Contributions for work ending 10/31/2023: **\$600.00**
 Remittance Amount Due: **\$600.00**
 Invoice #: CW23-00000004
 * PLEASE WRITE THIS INVOICE NUMBER ON THE CHECK THAT YOU MAIL AND PLEASE BE SURE TO INCLUDE A COPY OF THIS INVOICE WITH YOUR CHECK(S).
 Invoice Date: 11/29/2023

Amount Due:

Work Class	Fund	Fund Code	Hours Worked	Gross Wages	Employee 401K	Employee Roth	Loan Payment	Weeks Worked	Delinquent True Up	Calc Hrs	Basis	Rate	Amount
Default Work Classification	EE 401K	EE401	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	300.00	Employee 401K	1.00000	\$300.00
Default Work Classification	EE Roth	ROTH	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	100.00	Employee Roth	1.00000	\$100.00
Default Work Classification	True Ups	DTU	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	0.00	Delinquent True Up	1.00000	\$0.00
Default Work Classification	Loan	Loan	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	200.00	Loan Payment	1.00000	\$200.00
Default Work Classification	SEE 401K	SEE40	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	300.00	Employee 401K	0.00000	\$0.00
Default Work Classification	SEE Roth	SROTH	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	100.00	Employee Roth	0.00000	\$0.00
Default Work Classification	S Loan	SLoan	300.00	3,000.00	300.00	100.00	200.00	4.00	0.00	200.00	Loan Payment	0.00000	\$0.00
TOTAL													\$600.00

Employee Details:

Name	Work Class	HW	GW	EE 401K	EE ROTH	Loan Payment	WW	Delinquent True Up	EE401	ROTH	DTU	Loan	SEE40	SROTH	SLoan
Doe, Jane	Default Work Classification	200.00	\$2,000.00	200.00	0.00	200.00	4.00	0.00	\$200.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00
Doe, John	Default Work Classification	100.00	\$1,000.00	100.00	100.00	0.00	0.00	0.00	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
TOTAL		300.00	\$3,000.00	300.00	100.00	200.00	4.00	0.00	\$300.00	\$100.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00

- Clicking **Finalize Contribution** will take you to the above screen, which gives the below options.
 - **Pay Now** – Takes you to the next step so you can remit payment via ACH or Check
 - **Print Invoice** – Use this option to print a copy of the invoice for your records
 - **Done** - Use this option to enter another contribution form before making your payment

Enter a New Form - Pay Invoice(s)

Pending Payment

Select Contractor: Invoice Number:

* Invoice Begin Date: * Invoice End Date:

In accordance with the Collection Procedures, contribution reports and payments are due on the 15th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees of the International Union of Operating Engineers Local 399 Deferred Compensation Employee Savings Trust, all 401k elective deferral, Roth, and/or employer contributions not received by the 15th business day of the month following the month in which hours were worked shall be considered delinquent and assessed an amount due in the form of interest of up to 5% of the total delinquent contributions.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW23-00000004	10/31/2023	RET	Retirement	██████	\$600.00	DemoContractor	11/29/2023
<input type="checkbox"/>	CW23-00000003	10/31/2023	RET	Retirement	██████	\$800.00	DemoContractor	11/20/2023

- After selecting Pay Now, you will be taken to the Pending Payment page which will show all contribution forms entered on the website that have not yet been paid. Here, you will select the open invoice(s) you would like to remit payment for (via ACH or Check).
- Once you check the box(es) to the left of the invoice(s) desired, click the Select Invoice button.

Enter a New Form - Pay Invoice(s)

Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: \$600.00

Select Contractor: Invoice Number:

* Invoice Begin Date: * Invoice End Date:

In accordance with the Collection Procedures, contribution reports and payments are due on the 15th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees of the International Union of Operating Engineers Local 399 Deferred Compensation Employee Savings Trust, all 401k elective deferral, Roth, and/or employer contributions not received by the 15th business day of the month following the month in which hours were worked shall be considered delinquent and assessed an amount due in the form of interest of up to 5% of the total delinquent contributions.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW23-00000004	10/31/2023	RET	Retirement	██████████	\$600.00	DemoContractor	11/29/2023
<input type="checkbox"/>	CW23-00000003	10/31/2023	RET	Retirement	██████████	\$800.00	DemoContractor	11/20/2023

- After clicking **Select Invoice**, the invoice(s) you've selected will show highlighted in orange and a "Payment Summary" will be displayed in the upper-left corner showing the total amount due for the selected invoice(s).
- If the amount is correct, click **Make Payment**.
 - Use the **Edit Selection** option if you selected the wrong invoice(s). This will allow you to change your selections.

Enter a New Form - Pay Invoice(s)

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us
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Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW23-00000004	10/31/2023	Retirement		\$600.00
TOTAL				\$600.00

Total Invoice Amount : **\$600.00**

Invoice Adjustment Amount:

Total Amount Due: **\$600.00**

Adjustment Reason:

Pay By: ACH(Online) Check

- Clicking Make Payment takes you to the above screen showing the invoice(s) you've selected and the total amount due.
- Option to adjust amount being paid
 - Use the Invoice Adjustment Amount field to enter an adjustment amount (if any). You may enter a positive or negative amount to increase or decrease the payment amount by the amount you've entered. This will automatically update your Total Amount Due.
 - When an adjustment amount is entered, you are required to also enter the reason for the adjustment in the Adjustment Reason box (e.g. Liquidated Damages or Over/Under payment from a prior period).

Enter a New Form - Pay Invoice(s)

Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW23-00000004	10/31/2023	Retirement		\$600.00
TOTAL				\$600.00

Total Invoice Amount : **\$600.00**
Invoice Adjustment Amount:
Total Amount Due: **\$600.00**
Adjustment Reason:

Pay By: ACH(Online) Check

- **Now select your Pay By type**
 - **If you select ACH (Online) and click submit you will be taken to the ACH Payment screen (see next page).**
 - **First time ACH payments will be prompted to complete the below form specifying your company name, bank account number, routing number, and account type.**
 - **This information will be saved for future contributions and only needs to be updated if it has changed.**

Enter a New Form - Pay Invoice(s)

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

ACH Payment

In accordance with the Collection Procedures, contribution payments are due on the 20th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees, payments received past the due date are subject to liquidated damages of 10% of the unpaid contributions and interest on the unpaid contributions of 12% per annum. The first 'late' of the calendar year is forgiven as long as no other late reports are received. If you have ACH Block or Filtering on the bank account listed below, the Company ID for this transaction will be 2065308.

Total Amount Due: \$6,513.60

Bank Account Number: (Last 4 digits) [REDACTED]

Routing Number: (Last 4 digits) [REDACTED]

Bank Name: [REDACTED]

Account Type: Checking

Settlement Date: 10/2/2020

*Note:Click Edit Account to correct your bank account.

- **Once on the ACH Payment screen:**
 - **Input a settlement date for when you would like the funds withdrawn from your account. Note: because there is a 2 work day lag between when ACH transactions are submitted and when they are deposited into the fringe fund's bank account, you must submit your payment at least 2 work days prior to when you want it to be considered paid.**
 - **If you have an ACH block on your bank account, please make sure that you provide your bank the appropriate details in order for the payment to be processed.**
 - **After selecting Submit, you will be taken to a Payment Confirmation page. This can be printed for your records. This information will also be saved under the Contribution Payments tab of the website.**

If you select to pay by check, after you click **Submit** on the Make a Payment screen, you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check.

Select Contractor: [REDACTED] INC

* Routing Number:

* Bank Account Number:

* Account Type: Checking Saving

Bank Name:



* Please enter the characters as shown in the image.

Modify A Saved Contribution Form

The screenshot shows the 'Electronic Contribution' page with a navigation bar at the top containing 'Home', 'Electronic Contribution', 'Contribution Payment', 'Employer Information', 'News', and 'Contact Us'. Below the navigation bar, the page title 'Electronic Contribution' is displayed. The main content area contains the instruction 'Select the contractor from the list to submit your contributions'. A form box contains the following elements: 'Select Contractor:' with a dropdown menu showing 'INC'; 'Process Contribution:' with a dropdown menu open, showing options: 'Enter New Contribution', 'Modify / Submit Saved Contribution' (highlighted), 'Upload Contribution File', and 'Copy / Modify Previous Report Form'; and '*Batch Number:' with a dropdown menu. At the bottom of the form box are 'Submit' and 'Cancel' buttons.

- If you select Modify / Submit Saved Contribution from the Electronic Contribution page, you can open a previously saved contribution form and continue from where you left off. Saved but unsubmitted contribution forms are only saved for 30 days. Once you submit a contribution form, however, it is saved permanently.

Modify A Saved Contribution Form

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: [Redacted] INC

Process Contribution: Modify / Submit Saved Contribution

*Batch Number: CW20-00000015

Batch Number	CBA	Work Start Date	Work End Date
CW20-00000015	(00) BTE AGREEMENT	08/01/2020	08/31/2020

- 1. Select a saved batch by selecting its batch number from the Batch Number drop down list.
- 2. Click the Submit button.
- 3. The rest of the process is the same as entering a new contribution form (refer to instructions above).

Upload a Contribution File

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: [Redacted] INC

Work Start Date: [Dropdown: Enter New Contribution, Modify / Submit Saved Contribution, Upload Contribution File, Copy / Modify Previous Report Form, Regular Contribution]

Work End Date: [Dropdown: 8/31/2020]

Process Contribution: [Dropdown: BTE AGREEMENTS]

Contribution Type: [Dropdown: Regular Contribution]

CBA: [Dropdown: BTE AGREEMENTS]

*File Name: [Text Field] Browse...

Submit Cancel

- If you select Upload Contribution File from the Electronic Contribution page, you can upload contribution form data directly into the system from a data file in .CSV or .TXT format. These files can normally be extracted from your company's payroll system. Using this option can be helpful when there are a large number of employees for whom fringe contributions are being reported.
 1. Select a Work Start Date and Work End Date. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and end dates.
 2. Select the appropriate CBA based on the work you are reporting for. This will pull the related fringe rates.
 3. Click the Choose File button to find the .CSV or .TXT file you want to use.

Upload a Contribution File

Whether you export from your payroll system or you use Excel to create spreadsheets with employee information, you need to save your file as a .CSV or .TXT file. Simply select “File,” “Save As,” and choose .CSV or .TXT from the “Save as type” drop down list.

Below is the file format that must be used in order to upload contributions. The columns must be in this exact order or an error will occur and you will be unable to upload. A header line should not be used in your file (i.e. employee contribution information should begin in row 1). If a header line is included, it will cause errors when uploading.

SSN	DFLT	First	Last	Middle	Hours Worked	Gross Wages	Employee 401K	Employee Roth	Loan Payment	Weeks Worked	Delinquent True Up
123456789	DFLT	John	Doe		100	1000	50	50		4	
987654321	DFLT	Jane	Doe		100	1000	100		100	4	50

DO NOT INCLUDE THIS LINE IN THE IMPORT. This line is just meant to state what each field is meant for.



Upload a Contribution File

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Contribution Entry Form

Contribution Batch

Contractor Name: ██████████ INC Contractor Number: ██████████
 Batch Number: CW20-0000017 Work End Date: 08/31/2020
 CBA: 00 - BTE AGREEMENTS

[Rate Inquiry](#) [Add Employee](#) [Delete Employee](#) [Save and Complete Later](#) [Calculate Contribution](#) [Cancel](#)

Row No	SSN	First Name	MI	Last Name	Gross	Hours Paid	Hours Worked	Delete?
	123456789	Doe	D	John	1000.00	120.00	100.00	<input type="checkbox"/>
	234567890	Doe	D	Jane	1000.00	120.00	100.00	<input type="checkbox"/>
3					0.00	0.00	0.00	<input type="checkbox"/>

- Upon clicking **Submit**, you should be taken to a screen that looks similar to the above. If, however, your data or file format is incorrect, you will receive an error message and the file will not be uploaded.
- Once the file has been successfully uploaded, you can proceed as if you were entering a new contribution form (refer to instructions above).

Copy/Modify Previous Report Form

The screenshot shows the 'Electronic Contribution' page with a navigation bar at the top containing 'Home', 'Electronic Contribution', 'Contribution Payment', 'Employer Information', 'News', and 'Contact Us'. Below the navigation bar, the page title is 'Electronic Contribution'. The main content area contains the instruction 'Select the contractor from the list to submit your contributions'. The form fields include: 'Select Contractor:' with a dropdown menu showing 'INC' and a list of options including 'Enter New Contribution', 'Modify / Submit Saved Contribution', 'Upload Contribution File', and 'Copy / Modify Previous Report Form' (which is highlighted in blue); 'Work Start Date:' and 'Work End Date:' with a dropdown menu showing '8/31/2020'; 'Process Contribution:'; and '*Invoice Number:' with a dropdown menu showing 'CW20-0000009'. A red box highlights a checkbox labeled 'Check here to zero out hours and amounts from copied data'. At the bottom of the form are 'Submit' and 'Cancel' buttons.

- If you select Copy / Modify Previous Report Form from the Electronic Contribution page, you will be able to reuse electronic contribution data previously input into the system for the current month you are now entering. This option will auto-populate the same Employees (with SSN & names) as were previously used by you for the selected CBA. This can be beneficial when you consistently report on the same employees each pay period.
 1. Select a Work Start Date and Work End Date. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and end dates.
 2. From the Invoice Number drop down list, select the Invoice you would like to copy.
 3. Check the box in the bottom left of the screen to zero out any information from the copied data. This will keep the same employees but zero out their form details so you can enter the correct amounts for this pay period.
 4. Click the Submit button.
 5. The rest of the process is the same as entering a new contribution form (refer to instructions above).

How to View Past Contribution Forms

The screenshot displays the 'Electronic Contribution' section of the BeneSys web application. At the top, there is a navigation bar with links for Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. Below this, the 'Electronic Contribution' page title is shown. A dropdown menu is open under 'Electronic Contribution', with 'View All Contributions' highlighted in a red box. Below the menu, there is a prompt: 'Select the contractor from the list to submit:'. The main form area contains several fields: 'Select Contractor:' with a dropdown menu showing 'INC'; 'Work Start Date:' with a date picker set to '9/1/2020'; 'Work End Date:' with a date picker set to '9/30/2020'; 'Process Contribution:' with a dropdown menu set to 'Enter New Contribution'; 'Contribution Type:' with a dropdown menu set to 'Regular Contribution'; and 'CBA:' with a dropdown menu set to 'BTE AGREEMENTS'. There is also a checkbox labeled 'Report no Hours' and two buttons, 'Submit' and 'Cancel'.

- You can view all your previously submitted contributions by selecting the View All Contributions link as shown above.

How to View Past Contribution Forms

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us
View All Contributions					
Select Contractor:	<input type="text" value="Select Contractor"/>	Begin Date:	<input type="text" value="8/30/2020"/>	End Date:	<input type="text" value="9/30/2020"/>
<input type="button" value="Search"/>					
<small>Special Note: A nightly process is set up to process ACH payments on the same day of entry. If you wish to delete a form that is associated to an ACH payment you must do this the same day of entry before the nightly process takes place. If you have multiple forms associated with one payment please be advised that deletion of one form will automatically place a stop on your ACH payment.</small>					

- Once on the View All Contributions screen, you can select a contractor name from the drop down list (some contractors can have multiple contractor numbers to choose from based upon how their account is setup).
- Once you click the Search button it will show a screen with all past contribution forms for the contractor you've selected (see below).

How to View Past Contribution Forms

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

View All Contributions

Select Contractor: [REDACTED] INC Begin Date: 8/30/2020 End Date: 9/30/2020 Search

Special Note: A nightly process is set up to process ACH payments on the same day of entry. If you wish to delete a form that is associated to an ACH payment you must do this the same day of entry before the nightly process takes place. If you have multiple forms associated with one payment please be advised that deletion of one form will automatically place a stop on your ACH payment.

Invoice #	Wrk Date	Section Code	Section	No.Empl	Cont No.	Contractor	Amount	Status	Payment	Deposit Dt	Submitter	Trans. Dt	Del
CW20-00000011	08/31/2020	00	BTE AGREEMENTS	2	[REDACTED]	[REDACTED] INC	\$6,513.60	Pending			DemoContractor	09/30/2020	<input type="checkbox"/>
CW20-00000010	08/31/2020	00	BTE AGREEMENTS	2	[REDACTED]	[REDACTED] INC	\$6,513.60	Pending			DemoContractor	09/30/2020	<input type="checkbox"/>
CW20-00000009	08/31/2020	00	BTE AGREEMENTS	2	[REDACTED]	[REDACTED] INC	\$6,513.60	Pending	ACH	10/02/2020	DemoContractor	09/30/2020	<input type="checkbox"/>

Delete Contribution(s)

- If you wish to delete any of the invoices shown, you may do so from this screen, however, you can only delete invoices with a “Pending” status. To delete these invoices, check the box in the Del column next to the invoices to be deleted, then click the Delete Contribution button at the bottom of the page.
- To delete invoices with an “In Process” status, you will need to contact the fund office.
- Invoices with a “Paid” status cannot be deleted, as these have already been processed and entered into the contributions system.

How to Make Payments on Multiple Saved Forms

The screenshot displays the BeneSys web application interface. At the top, there is a navigation bar with the following tabs: Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. The 'Contribution Payment' tab is active, and its dropdown menu is open, showing four options: 'Make a Payment' (highlighted with a red box), 'View All Payment', 'Account Management', and 'Make Variance Payment'. To the right of the navigation bar, there is a 'News / Events' section with a dark blue header and the text 'No news/events are available'. The main content area on the left contains an 'Introduction' section with the following text: 'You now have the power to access information 24 hours a day, 7 days a week.' Below this, there are two sections: 'To Navigate this site:' with a bullet point 'Click on a header on the top. This opens your submenu options.' and 'To Log On:' with two bullet points: 'There is a login box in the upper right corner.' and 'Enter your User Name and Password then click on the login button.' At the bottom of the introduction, there are two lines of text: 'If your login was successful you'll be directed to the appropriate page to begin.' and 'If your login was invalid you'll be directed back to the login screen where you will have the chance to try again.'

- **If you have entered and saved multiple invoices and have not yet processed a payment for them, you can process one payment for multiple invoices, whether by ACH or Check.**
- **From the Contribution Payment dropdown menu choose Make a Payment (see above).**

How to Make Payments on Multiple Saved Forms

Home Electronic Contribution **Contribution Payment** Employer Information News Contact Us

Pending Payment

Select Contractor: [Redacted] INC Invoice Number: []
 * Invoice Begin Date: 8/30/2020 * Invoice End Date: 9/30/2020
 [Search] [Clear]

In accordance with the Collection Procedures, contribution payments are due on the 20th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees, payments received past the due date are subject to liquidated damages of 10% of the unpaid contributions and interest on the unpaid contributions of 12% per annum. The first 'late' of the calendar year is forgiven as long as no other late reports are received. If you have ACH Block or Filtering on the bank account listed below, the Company ID for this transaction will be 2065308.

Pending Invoice: [Select Invoice] [Cancel]

	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input type="checkbox"/>	CW20-00000011	08/31/2020	00	BTE AGREEMENTS	[Redacted]	\$6,513.60	DemoContractor	09/30/2020
<input type="checkbox"/>	CW20-00000010	08/31/2020	00	BTE AGREEMENTS	[Redacted]	\$6,513.60	DemoContractor	09/30/2020

[Select Invoice] [Cancel]

- Once on the Make a Payment screen, all contribution forms that have not been finalized for payment will be listed.
- If you would like to filter the unpaid invoices, you can enter an Invoice Begin and Invoice End date to narrow or widen your search results.
- To pay invoice(s), check the box to the left of the Invoice Numbers you would like to pay, then click the Select Invoice button. This will combine all forms you selected into one payment amount and you can continue to make your payment through the normal payment process (refer to instructions above).

Questions

For questions, enrollment, or training, please call (248) 641-4915 and ask to speak with someone from our Contributions Team.