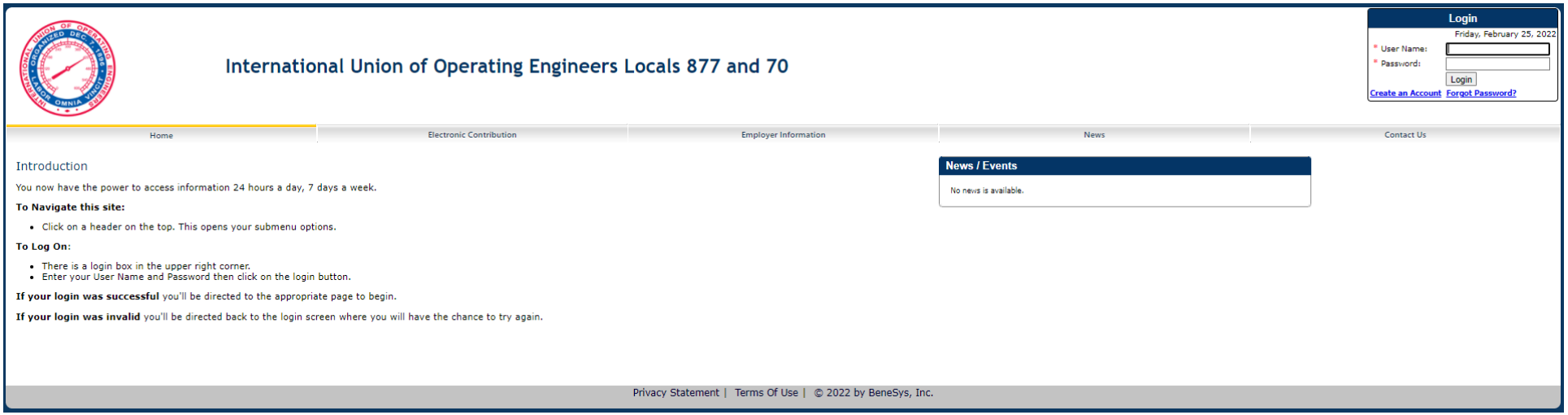
International Union of Operating Engineers
Locals 877 and 70
Electronic Contribution Website
User Manual

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 or Check
- 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

BeneSys

Web Address:
www.IUOE877AND70Employers.org



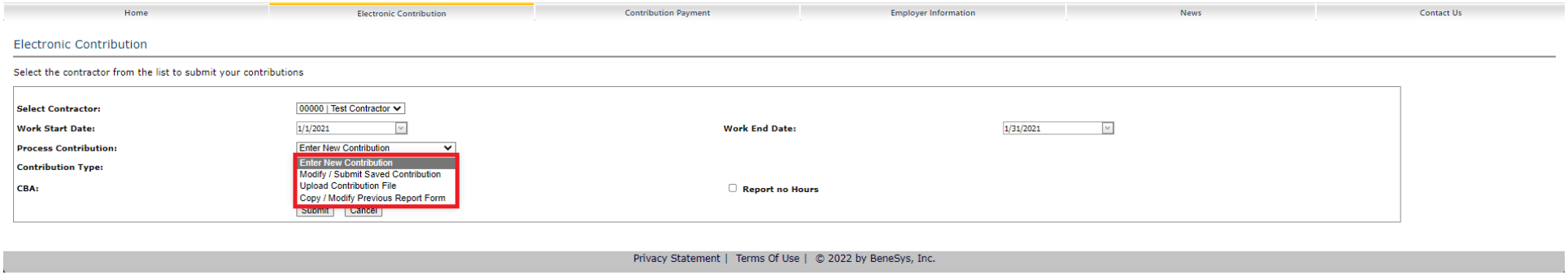
- **To log in to this site, you will need to contact the BeneSys office to register, at which point you will be mailed two separate introduction letters. These letters will contain the contractor number and identification number needed for registration. Once you have received your letters, navigate to 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 (781) 769-5789 or (877) 562-2570, where someone will assist you.**

Let's Get Started

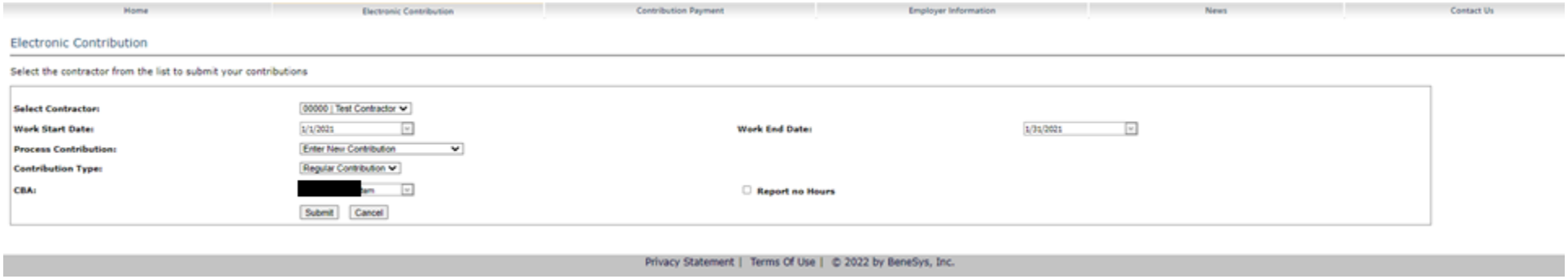
- **To begin entering employee contribution information, mouse over the Electronic Contribution tab and select Process Contribution as shown above.**
    - **This option will allow you to create and process contributions.**

Processing Contributions



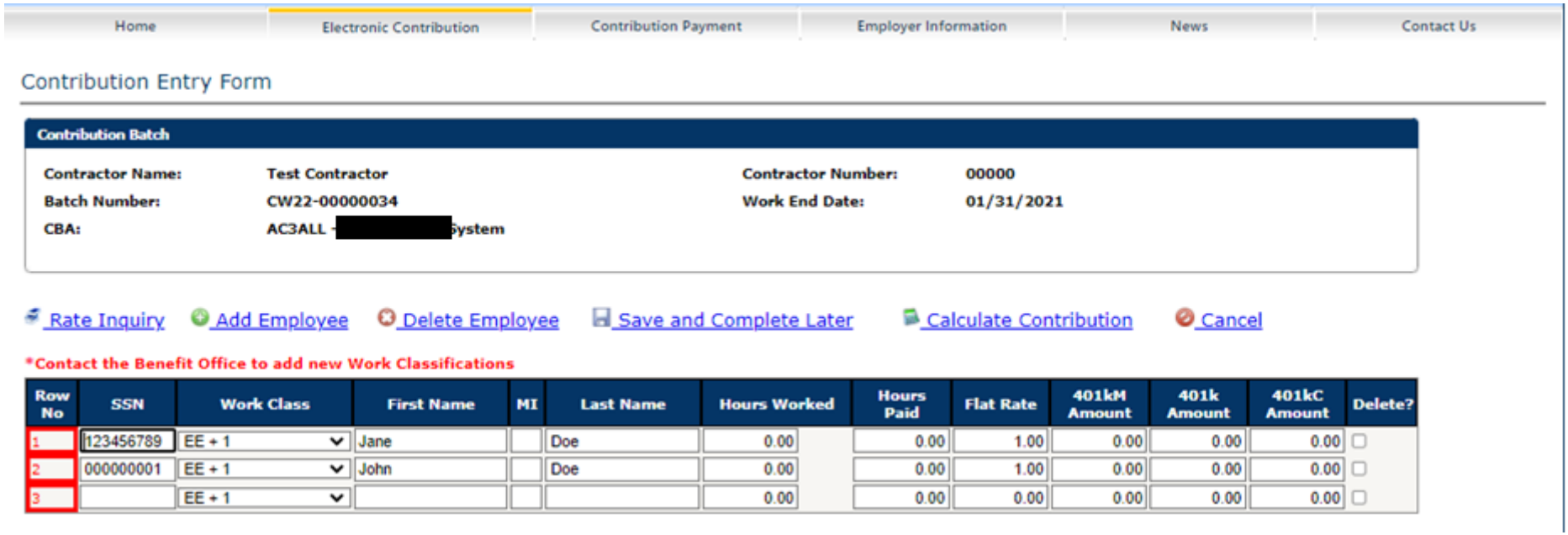
- **<u>Enter New Contribution</u> – This allows manual entry of your contribution form**
- **<u>Modify / Submit Saved Contribution</u> – Allows you to retrieve a previously entered and saved contribution form**
- **<u>Upload Contribution File</u> – Allows you to upload a data file exported from your payroll system (.CSV or .TXT format) directly to the website**
- **<u>Copy / Modify Previous Report Form</u> – 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



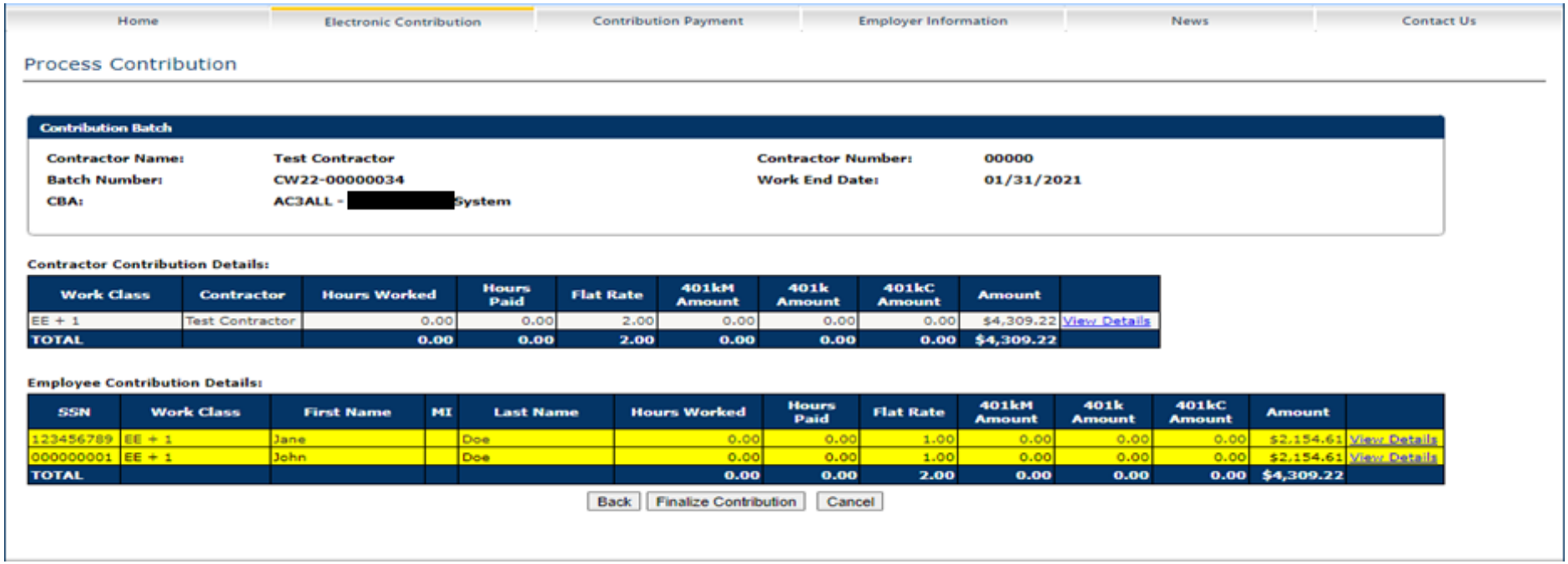
1. **Select the Contractor: If you only submit contributions for one contractor, that contractor will show by default and you won't have other contractors to select from. If you have a login that allows you to submit contributions for multiple contractors, click the drop-down arrow and a list of contractors 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



- **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.**
- **Verify the appropriate Work Class for every employee.**
- **Enter the Hours Paid, Hours Worked, Flat Rate (of 1), 401kM, 401k, and 401kC 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



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Process Contribution

Contribution Batch

Contractor Name:	Test Contractor	Contractor Number:	00000
Batch Number:	CW22-00000034	Work End Date:	01/31/2021
CBA:	AC3ALL - [redacted]System		

Contractor Contribution Details:

Work Class	Contractor	Hours Worked	Hours Paid	Flat Rate	401kM Amount	401k Amount	401kC Amount	Amount	
EE + 1	Test Contractor	0.00	0.00	2.00	0.00	0.00	0.00	$4,309.22	View Details
TOTAL		0.00	0.00	2.00	0.00	0.00	0.00	$4,309.22	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Hours Worked	Hours Paid	Flat Rate	401kM Amount	401k Amount	401kC Amount	Amount	
123456789	EE + 1	Jane		Doe	0.00	0.00	1.00	0.00	0.00	0.00	$2,154.61	View Details
000000001	EE + 1	John		Doe	0.00	0.00	1.00	0.00	0.00	0.00	$2,154.61	View Details
TOTAL					0.00	0.00	2.00	0.00	0.00	0.00	$4,309.22	

Back | Finalize Contribution | Cancel

- **The <u>View Details</u> link under Contractor Contribution Details will show you a breakdown of all calculated fringes**
- **The <u>View Details</u> link under Employee Contribution Details will show you a breakdown of all calculated fringes for that particular employee**
- **Use the <u>Back</u> button to return to the prior screen if you'd like to adjust work details for any employee. <u>*At no time*</u> 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 <u>Finalize Contribution</u> button. Note: once you've clicked <u>Finalize Contribution</u>, you cannot go back and make changes.**

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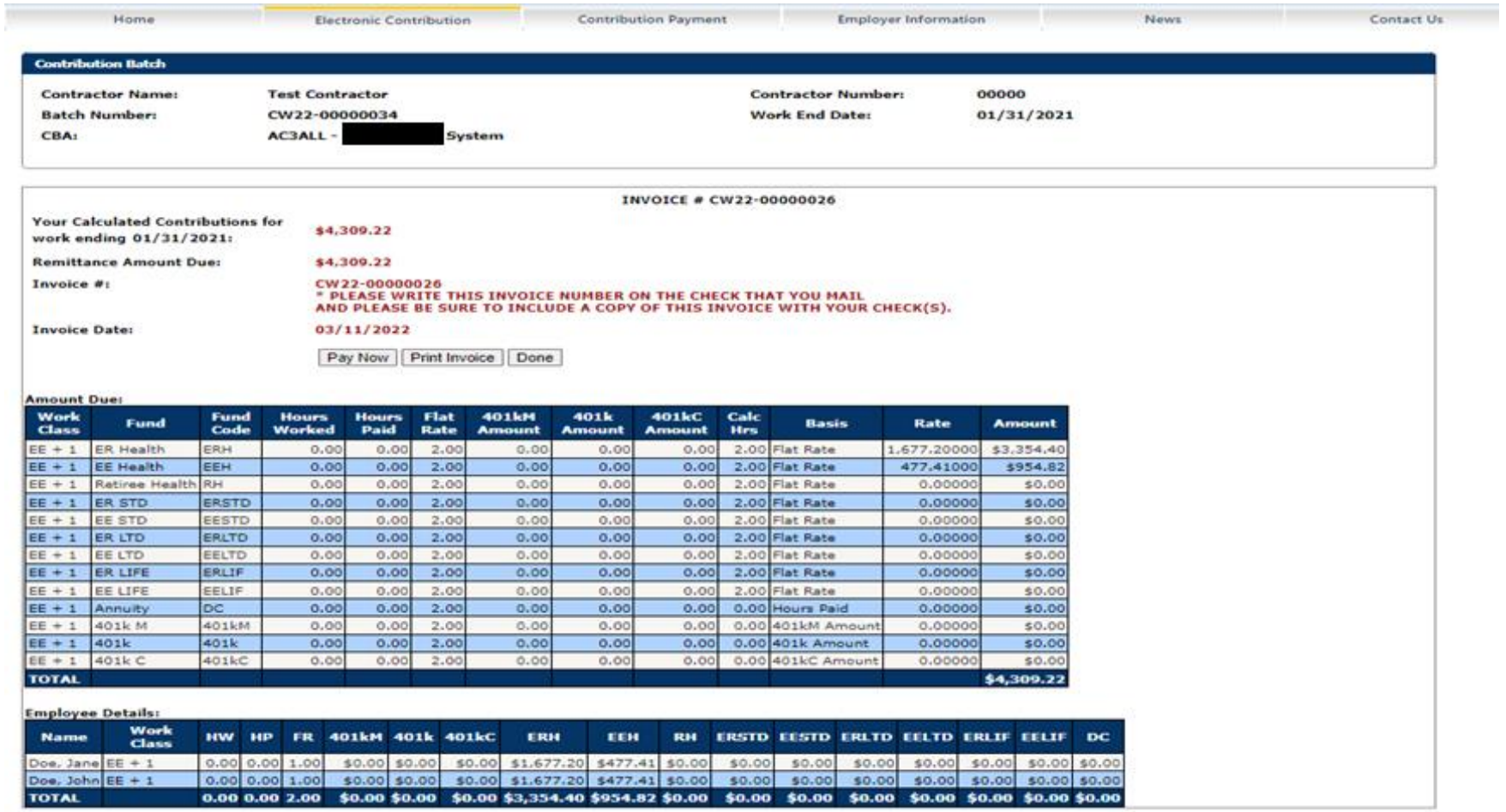
Enter a New Form - Finalize Contributions



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Contribution Batch

Contractor Name:	Test Contractor	**Contractor Number:**	00000
Batch Number:	CW22-00000034	**Work End Date:**	01/31/2021
CBA:	AC3ALL - [redacted] System		

INVOICE # CW22-00000026

Your Calculated Contributions for work ending 01/31/2021: $4,309.22

Remittance Amount Due: $4,309.22

Invoice #: CW22-00000026
* 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: 03/11/2022

Pay Now | Print Invoice | Done

Amount Due:

Work Class	Fund	Fund Code	Hours Worked	Hours Paid	Flat Rate	401kM Amount	401k Amount	401kC Amount	Calc Hrs	Basis	Rate	Amount
EE + 1	ER Health	ERH	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	1,677.20000	$3,354.40
EE + 1	EE Health	EEH	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	477.41000	$954.82
EE + 1	Retiree Health	RH	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	ER STD	ERSTD	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	EE STD	EESTD	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	ER LTD	ERLTD	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	EE LTD	EELTD	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	ER LIFE	ERLIF	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	EE LIFE	EELIF	0.00	0.00	2.00	0.00	0.00	0.00	2.00	Flat Rate	0.00000	$0.00
EE + 1	Annuity	DC	0.00	0.00	2.00	0.00	0.00	0.00	0.00	Hours Paid	0.00000	$0.00
EE + 1	401k M	401kM	0.00	0.00	2.00	0.00	0.00	0.00	0.00	401kM Amount	0.00000	$0.00
EE + 1	401k	401k	0.00	0.00	2.00	0.00	0.00	0.00	0.00	401k Amount	0.00000	$0.00
EE + 1	401k C	401kC	0.00	0.00	2.00	0.00	0.00	0.00	0.00	401kC Amount	0.00000	$0.00
TOTAL												$4,309.22

Employee Details:

Name	Work Class	HW	HP	FR	401kM	401k	401kC	ERH	EEH	RH	ERSTD	EESTD	ERLTD	EELTD	ERLIF	EELIF	DC
Doe, Jane	EE + 1	0.00	0.00	1.00	$0.00	$0.00	$0.00	$1,677.20	$477.41	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Doe, John	EE + 1	0.00	0.00	1.00	$0.00	$0.00	$0.00	$1,677.20	$477.41	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
TOTAL		0.00	0.00	2.00	$0.00	$0.00	$0.00	$3,354.40	$954.82	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

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

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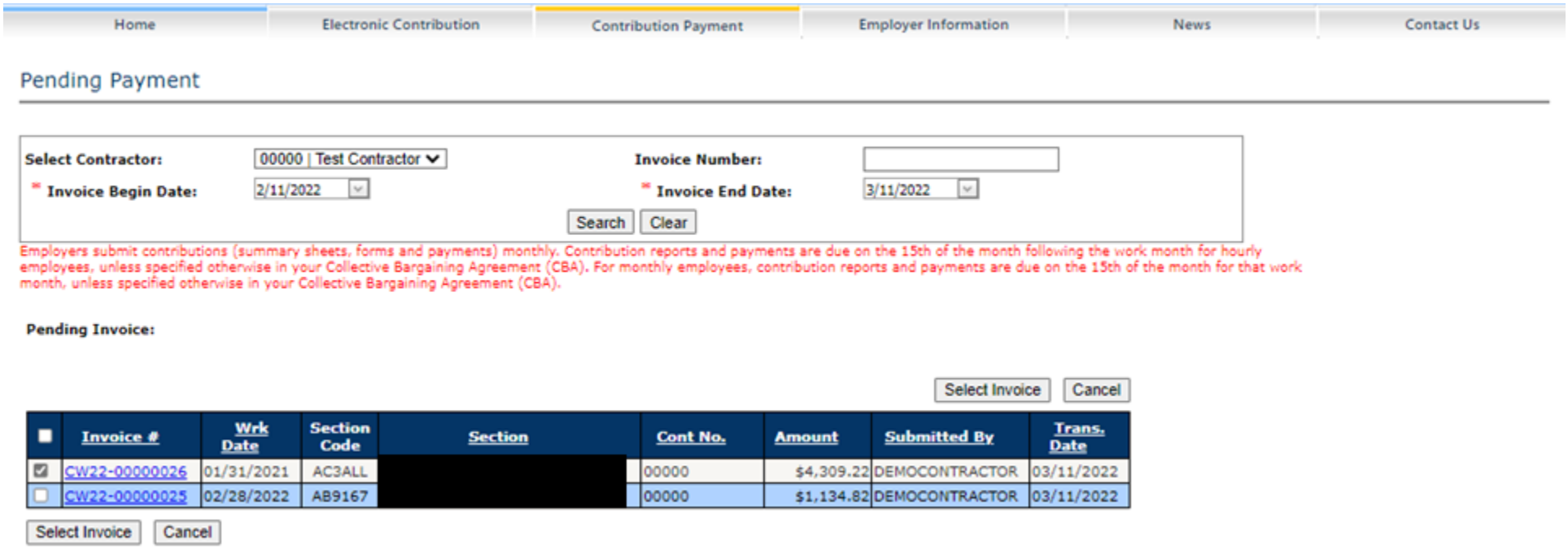
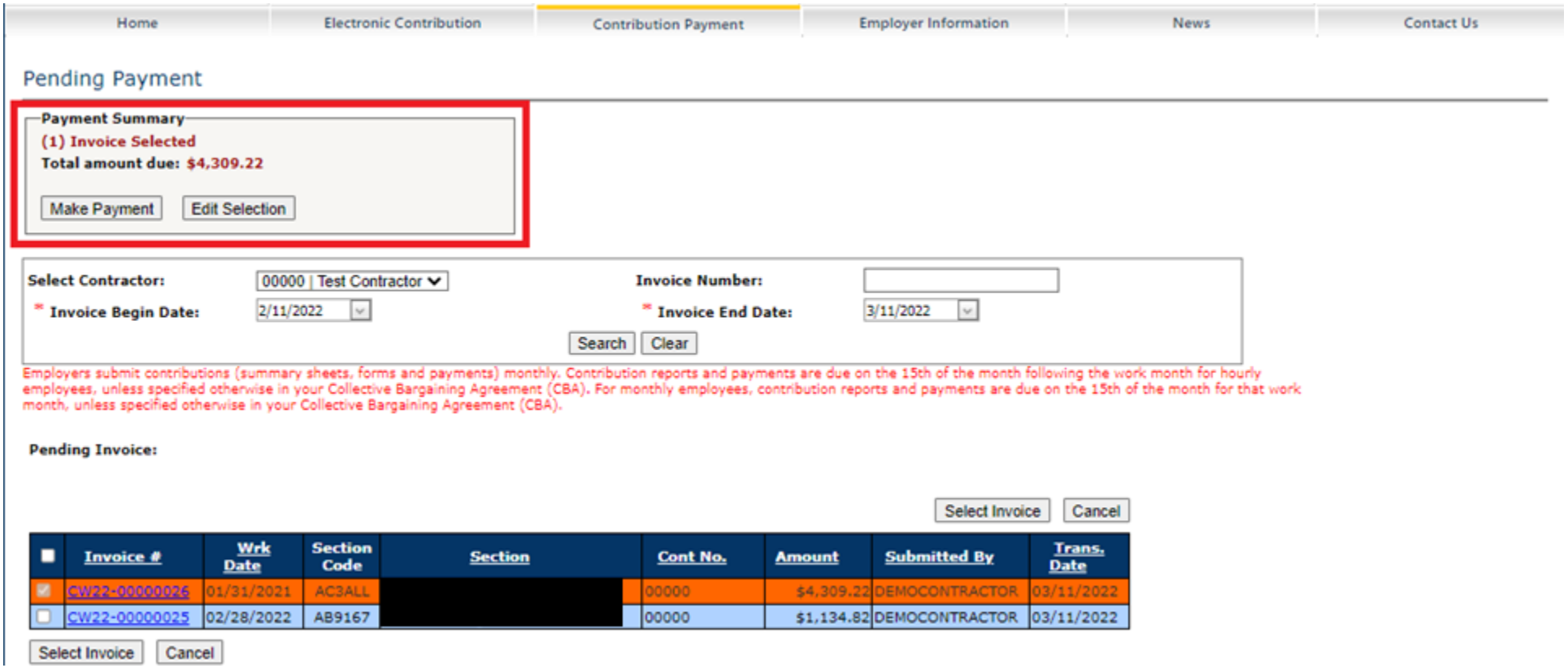
Enter a New Form - Pay Invoice(s)



- **After selecting <u>Pay Now</u>, 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 <u>Select Invoice</u> button.**

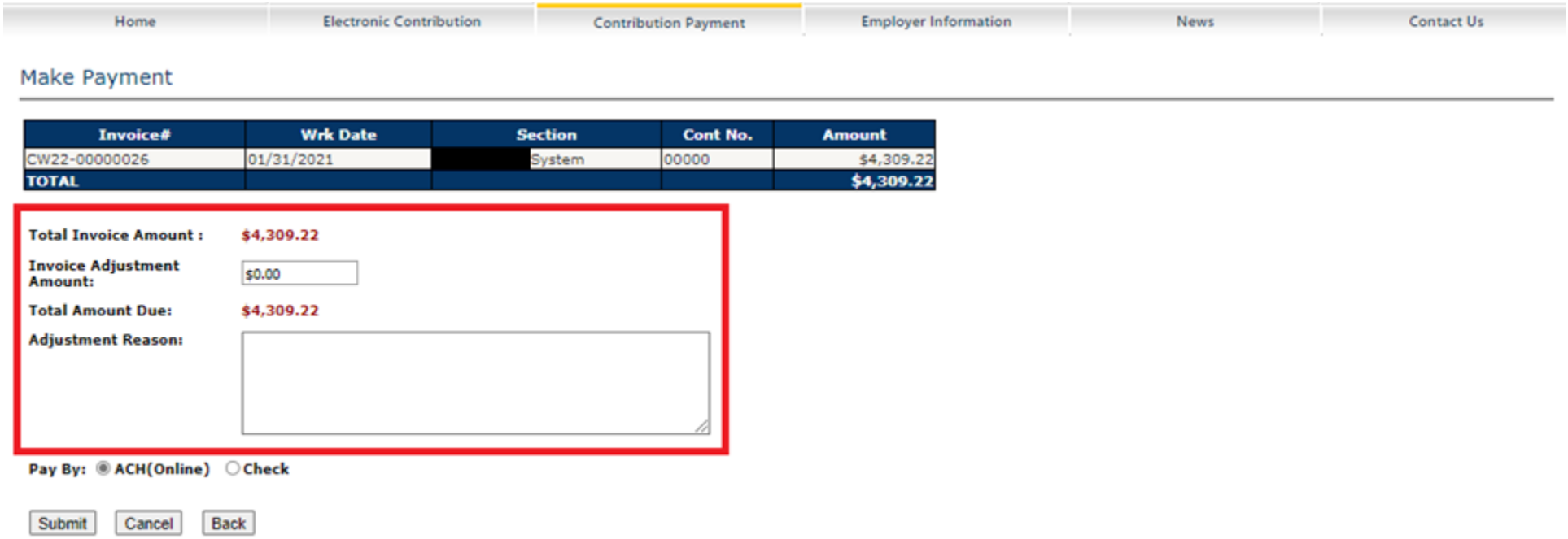
Enter a New Form - Pay Invoice(s)



- **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.**

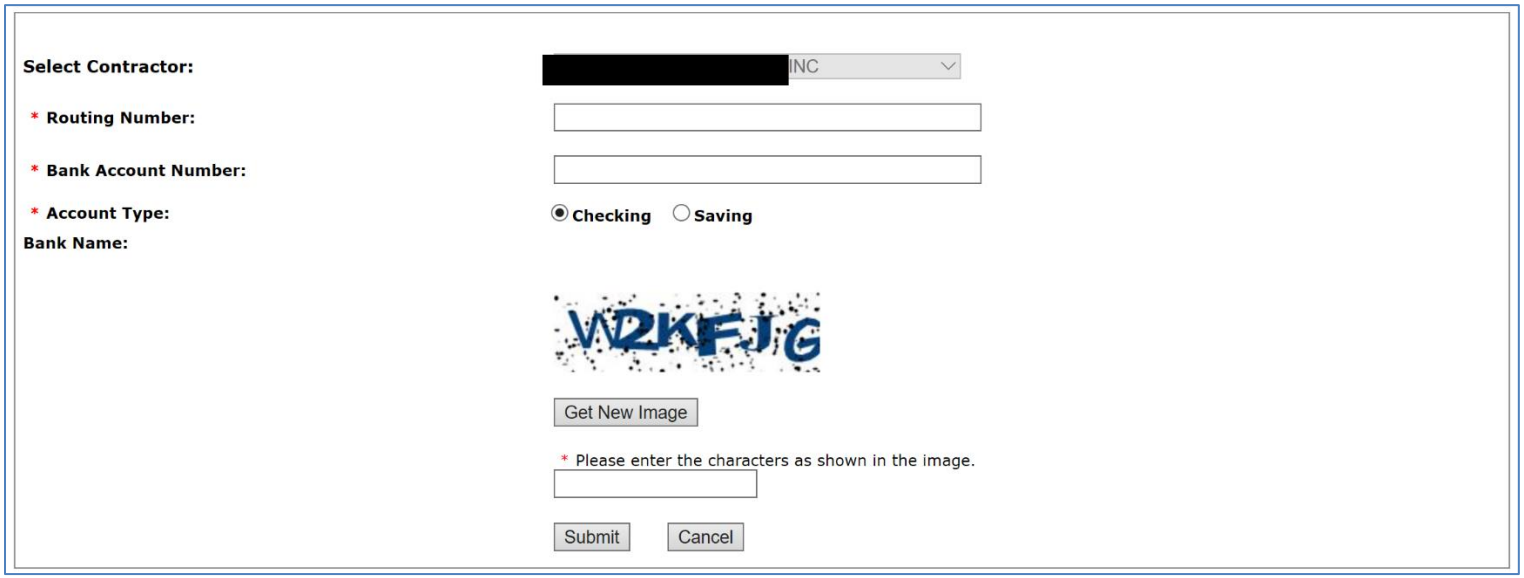
Enter a New Form - Pay Invoice(s)



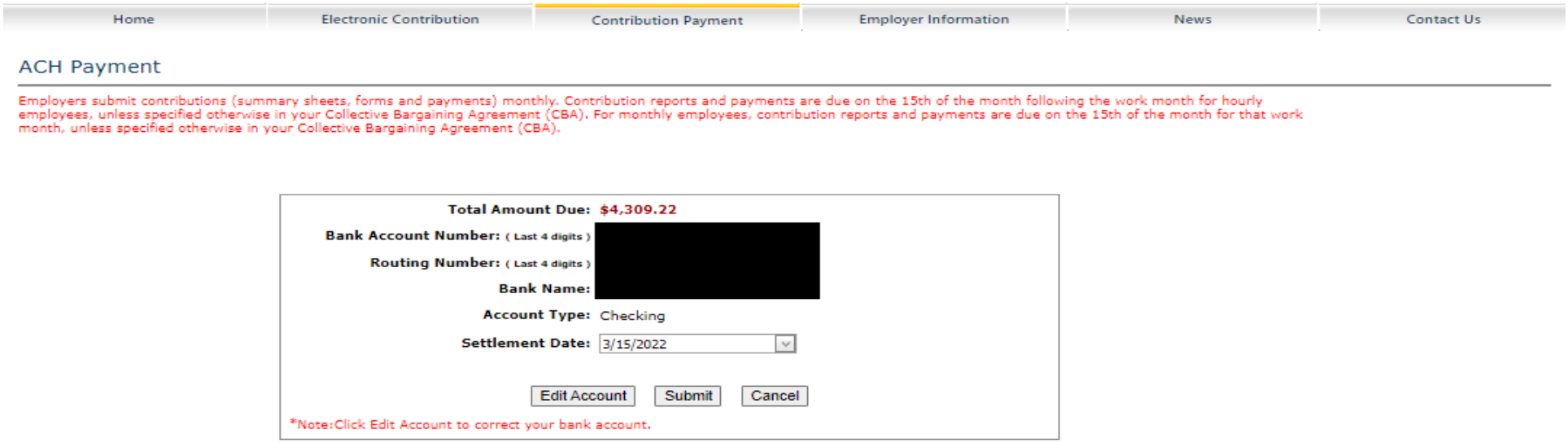
- **Clicking Make Payment takes you to the above screen showing the invoice(s) you've selected and the total amount due.**
- **Option to adjust amount being paid**
  - **Use the Invoice Adjustment Amount field to enter an adjustment amount (if any). You may enter a positive or negative amount to increase 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)

- **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.**



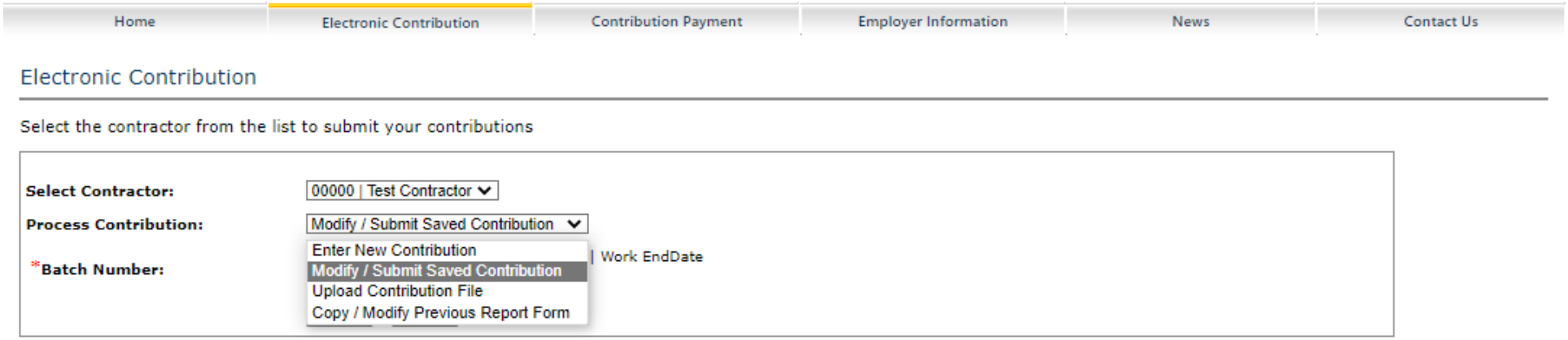
Enter a New Form - Pay Invoice(s)



- **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.**

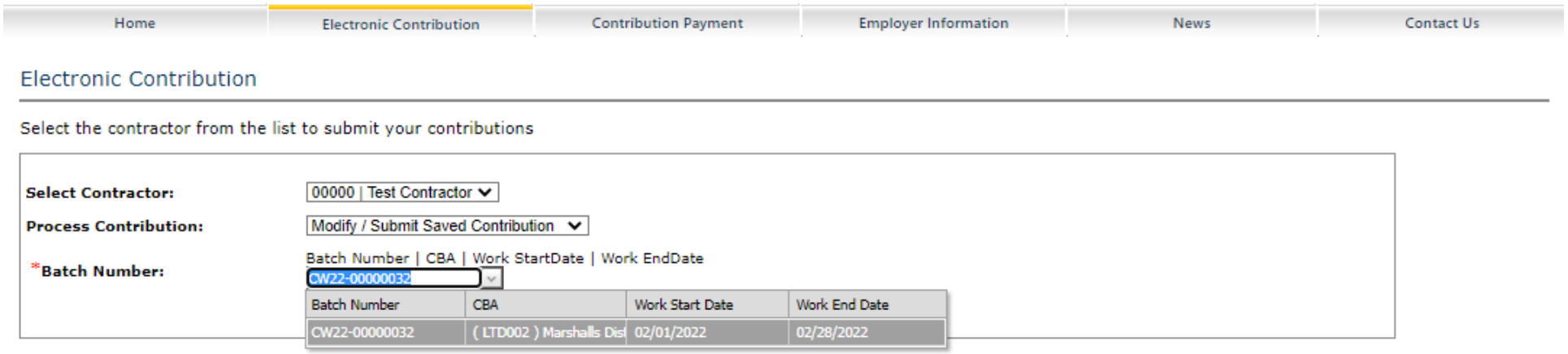
***If you select to pay by check*, after you click Submit on the Make a Payment screen, you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check.**

Modify A Saved Contribution Form



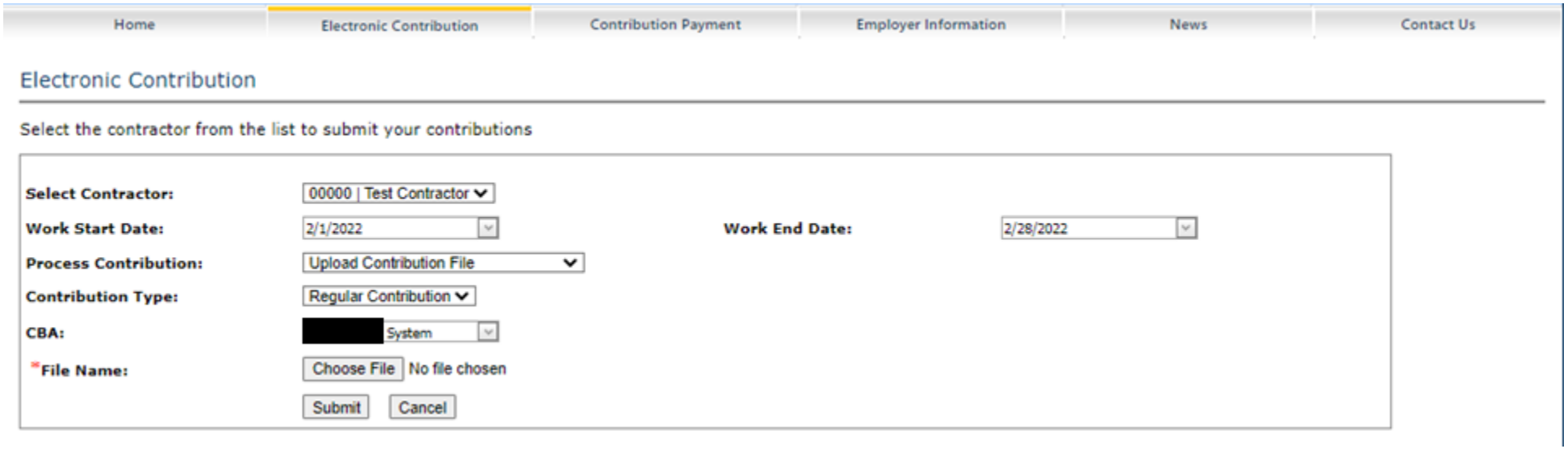
- **If you select <u>Modify / Submit Saved Contribution</u> from the Electronic Contribution page, you can open a previously saved contribution form and continue from where you left off. Saved but unsubmitted contribution forms are only saved for 30 days. Once you submit a contribution form, however,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

Modify A Saved Contribution Form



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

Upload a Contribution File



- **If you select <u>Upload Contribution File</u> 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 <u>Work Start Date</u> and <u>Work End Date</u>. 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 <u>Browse</u> 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	Work Class	Last	First	MI	Hours Worked	Hours Paid	Flat Rate	401kM	401k	401kC
	A	B	C	D	E	F	G	H	I	J	K
1	123456789	EE + 1	Doe	Jane		0.00	0.00	1.00	0.00	0.00	0.00
2	000000001	EE + 1	Doe	John		0.00	0.00	1.00	0.00	0.00	0.00

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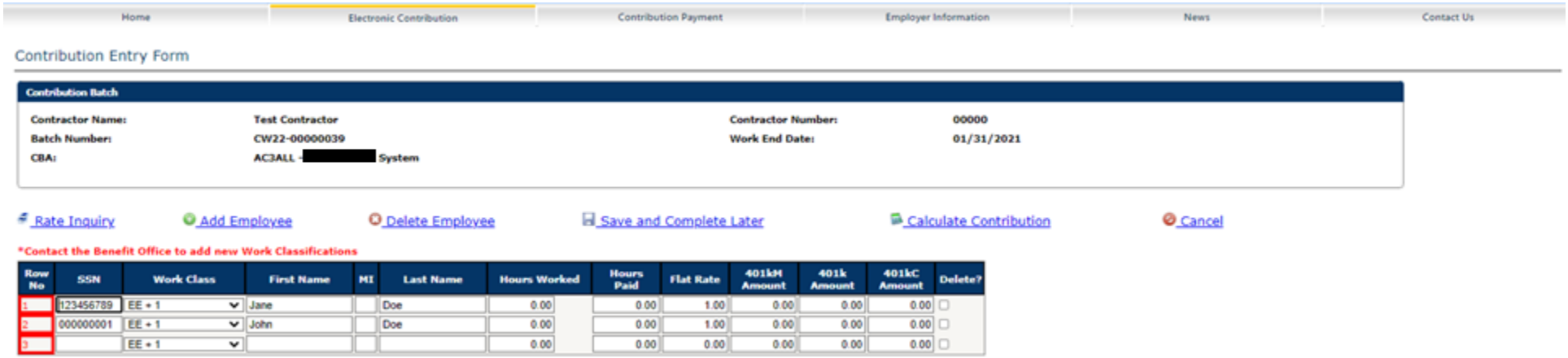
Work Class Codes

When uploading a contributions file, please be sure to only select work classes that are associated with the Collective Bargaining Agreement you are submitting contributions under. If a work class is used that is not associated with your CBA, you may receive unexpected results. All of the fund's work classes are shown below.

Code	Description
DFLT	Default
DFLTER	Default ER ONLY
SNG	Single
SNGER	Single ER ONLY
SNGOP	Single Opt-Out
SNGRET	Single Early Retiree
EE1	EE + 1
EE1S	EE + 1 Single
EE1ER	EE + 1 ER ONLY
FAM	Family
FAMS	Family Single
FAMS1	Family Single + 1
FAMER	Family ER ONLY
FAMOP	Family Opt-out
FAMRET	Family Early Retiree
EECH	EE + Child
EECHER	EE + Child ER ONLY
EECHOP	EE + Child Opt-Out
EESP	EE + Spouse
EESPER	EE + Spouse ER ONLY
EESPOP	EE + Spouse Opt-Out
P64RET	Post-64 Retiree

Upload a Contribution File

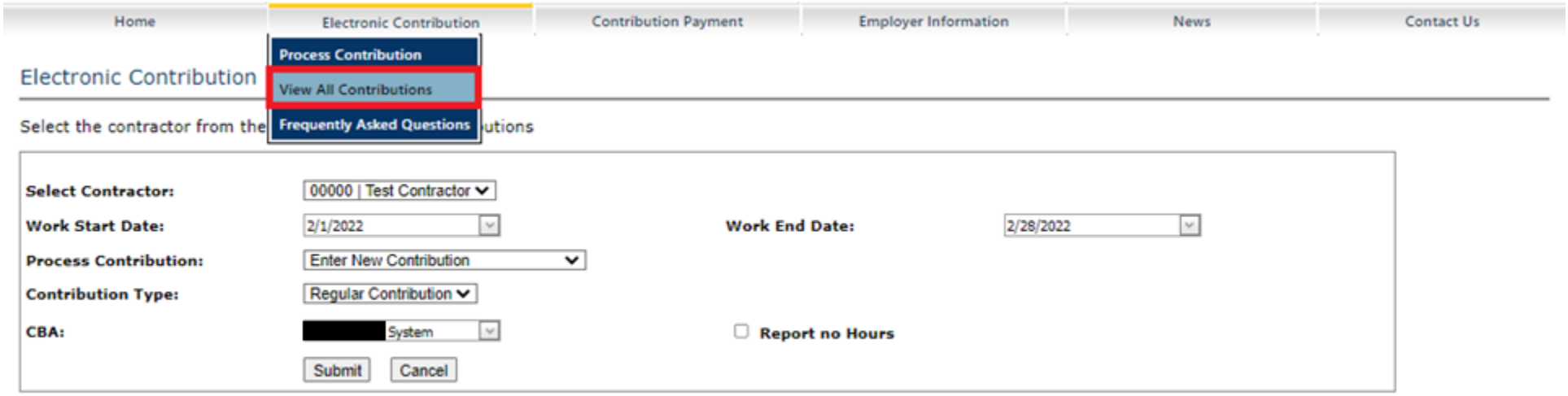


- **Upon clicking <u>Submit</u>, you should be taken to a screen that looks similar to the above. If, however, your data or file format is incorrect, you will receive an error message and the file will not be uploaded.**
- **Once the file has been successfully uploaded, you can proceed as if you were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

Copy/Modify Previous Report Form

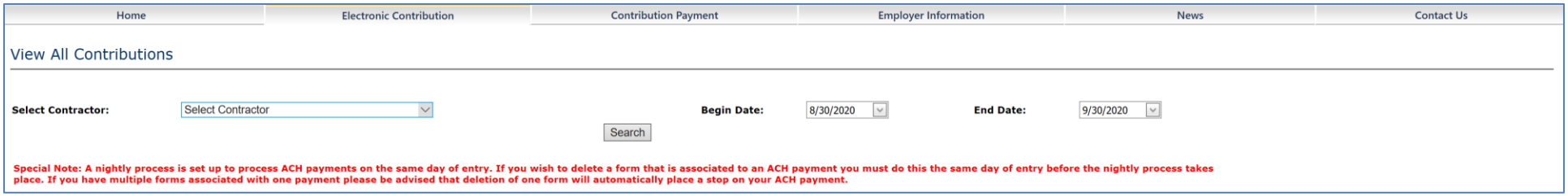
- **If you select Copy / Modify Previous Report Form from the Electronic Contribution page, you will be able to reuse electronic contribution data previously input into the system for the current month you are now entering. This option will auto-populate the same Employees (with SSN & names) as were 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



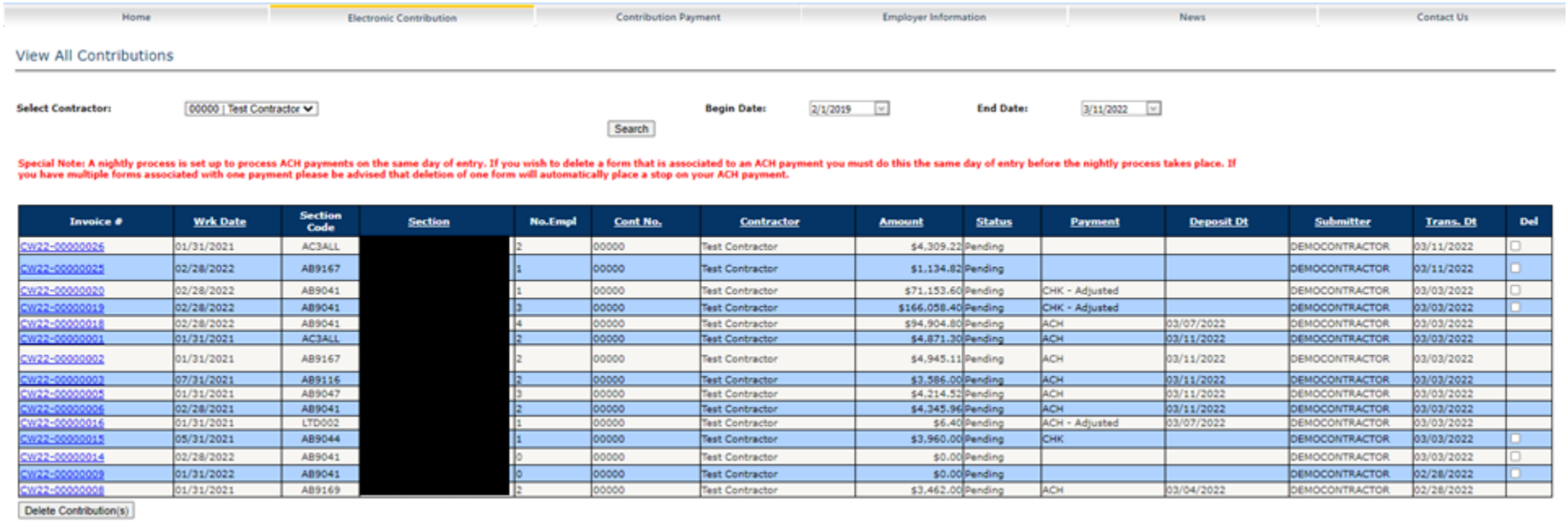
- **You can view all your previously submitted contributions by selecting the View All Contributions link as shown above.**

How to View Past Contribution Forms



- **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

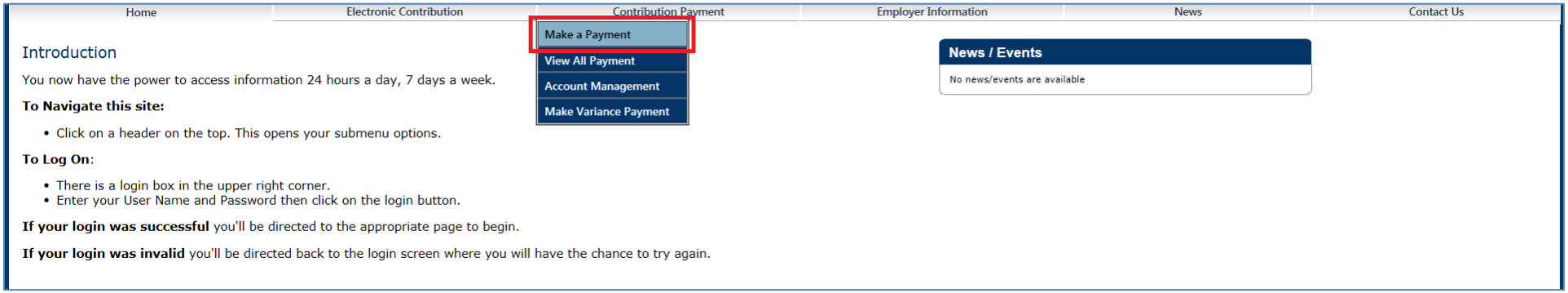


Invoice #	Wrk Date	Section Code	Section	No.Empl	Cont No.	Contractor	Amount	Status	Payment	Deposit Dt	Submitter	Trans. Dt	Del
CW22-00000026	01/31/2021	AC3ALL	[redacted]	2	00000	Test Contractor	$4,309.22	Pending			DEMOCONTRACTOR	03/11/2022	☐
CW22-00000025	02/28/2022	AB9167		1	00000	Test Contractor	$1,134.82	Pending			DEMOCONTRACTOR	03/11/2022	☐
CW22-00000020	02/28/2022	AB9041		1	00000	Test Contractor	$71,153.60	Pending	CHK - Adjusted		DEMOCONTRACTOR	03/03/2022	☐
CW22-00000019	02/28/2022	AB9041		3	00000	Test Contractor	$166,058.40	Pending	CHK - Adjusted		DEMOCONTRACTOR	03/03/2022	☐
CW22-00000018	02/28/2022	AB9041		4	00000	Test Contractor	$94,904.80	Pending	ACH	03/07/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000001	01/31/2021	AC3ALL		2	00000	Test Contractor	$4,871.30	Pending	ACH	03/11/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000002	01/31/2021	AB9167		2	00000	Test Contractor	$4,945.11	Pending	ACH	03/11/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000003	07/31/2021	AB9116		2	00000	Test Contractor	$3,586.00	Pending	ACH	03/11/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000005	01/31/2021	AB9047		3	00000	Test Contractor	$4,214.52	Pending	ACH	03/11/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000006	02/28/2021	AB9041		2	00000	Test Contractor	$4,345.96	Pending	ACH	03/11/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000016	01/31/2021	LTD002		1	00000	Test Contractor	$6.40	Pending	ACH - Adjusted	03/07/2022	DEMOCONTRACTOR	03/03/2022	
CW22-00000015	05/31/2021	AB9044		1	00000	Test Contractor	$3,960.00	Pending	CHK		DEMOCONTRACTOR	03/03/2022	☐
CW22-00000014	02/28/2022	AB9041		0	00000	Test Contractor	$0.00	Pending			DEMOCONTRACTOR	03/03/2022	☐
CW22-00000009	01/31/2022	AB9041		0	00000	Test Contractor	$0.00	Pending			DEMOCONTRACTOR	02/28/2022	☐
CW22-00000008	01/31/2021	AB9169		2	00000	Test Contractor	$3,462.00	Pending	ACH	03/04/2022	DEMOCONTRACTOR	02/28/2022	

- **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.**

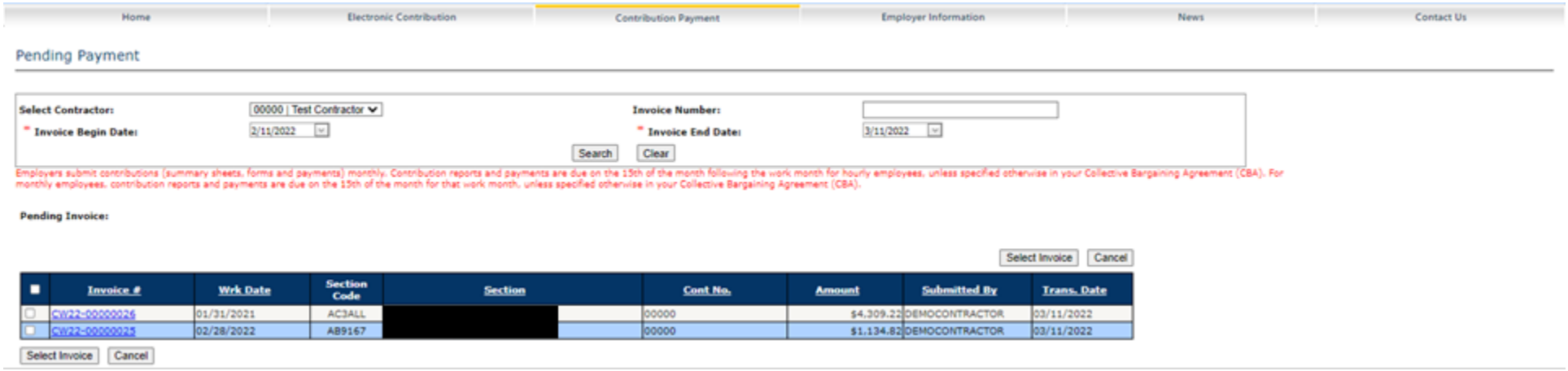
BeneSys

How to Make Payments on Multiple Saved Forms



- **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



- **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 (781) 769-5789 or (877) 562-2570 and ask to speak with someone from our Contributions Team.