BAC Local 2 Fringe Benefit Funds 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.baclocal2employers.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 (248) 828-6000 or (800) 435-4080, 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

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	▓▓▓▓▓▓▓▓▓▓ ⌄
Work Start Date:	11/1/2022 ⌄ **Work End Date:** 11/30/2022 ⌄
Process Contribution:	Enter New Contribution ⌄
	Enter New Contribution
	Modify / Submit Saved Contribution
Contribution Type:	Upload Contribution File
	Copy / Modify Previous Report Form
CBA:	☐ **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

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Entering a New Form

1. Select the <u>Contractor</u>: **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 <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.**
3. **Select <u>Enter New Contribution</u>.**
4. **The contribution type should always be <u>Regular Contribution</u>.**
5. **Select the appropriate <u>CBA</u> 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 <u>Submit</u> to begin entry.**

Enter a New Form - Contribution Entry

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Contribution Entry Form

Contribution Batch

Contractor Name:	████████	Contractor Number:	00000
Batch Number:	CW22-00000011	Work End Date:	11/30/2022
CBA:	B1 - Bricklayer - LMCC Journeyman/Foreman		

✎ 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	Gross Wages	Delete?
1	999991234	DEFAULT WORK CLASSIFICATION ▾	John	Q	Doe	120.00	1000.00	☐
2	999991235	DEFAULT WORK CLASSIFICATION ▾	Jane		Doe	120.00	1000.00	☐
3		DEFAULT WORK CLASSIFICATION ▾				0.00	0.00	☐

- **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 <u>Delete Employee</u>.**

- **Enter the <u>Hours</u> and/or <u>Gross Wages</u> amounts in the appropriate fields.**

- **Click <u>Save and Complete Later</u> 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 <u>Calculate Contribution</u>, at which point the following screen will show:**

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Enter a New Form – Calculate Contributions

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Process Contribution

Contribution Batch

Contractor Name:	████████	**Contractor Number:** 00000
Batch Number:	CW22-00000011	**Work End Date:** 11/30/2022
CBA:	B1 - Bricklayer - LMCC Journeyman/Foreman	

Contractor Contribution Details:

Work Class	Contractor	Hours	Gross Wages	Amount	
Default Work Classification	████████	240.00	2,000.00	$6,120.00	View Details
TOTAL		**240.00**	**2,000.00**	**$6,120.00**	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Hours	Gross Wages	Amount	
999991235	Default Work Classification	Jane		Doe	120.00	1,000.00	$3,060.00	View Details
999991234	Default Work Classification	John	Q	Doe	120.00	1,000.00	$3,060.00	View Details
TOTAL					**240.00**	**2,000.00**	**$6,120.00**	

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.

Enter a New Form - Finalize Contributions

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Contribution Batch

Contractor Name:	███████	Contractor Number:	00000
Batch Number:	CW22-00000012	Work End Date:	11/30/2022
CBA:	B1 - Bricklayer - LMCC Journeyman/Foreman		

INVOICE # CW22-00000006

Your Calculated Contributions for work ending 11/30/2022:	$6,120.00
Remittance Amount Due:	$6,120.00
Invoice #:	CW22-00000006
	* 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:	12/22/2022

[Pay Now] [Print Invoice] [Done]

Amount Due:

Work Class	Fund	Fund Code	Hours	Gross Wages	Calc Hrs	Basis	Rate	Amount
Default Work Classification	HEALTH	H & W	240.00	2,000.00	240.00	Hours	8.34000	$2,001.60
Default Work Classification	PENSION- TILE	TPEN	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	DNU Vacation - Tile	TVAC	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	DUES	DUES	240.00	2,000.00	240.00	Hours	2.19000	$525.60
Default Work Classification	PROMOTION	PROMO	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	LCL TRAIN.	LCL T	240.00	2,000.00	240.00	Hours	0.06000	$14.40
Default Work Classification	IMI TRAIN.	IMI T	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	SE RET.	SE RE	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	INTL PENSION	INT P	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	SUB	SUB	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	ANNUITY	ANNUI	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	ESCROW	ESCRO	240.00	2,000.00	240.00	Hours	0.00000	$0.00
Default Work Classification	HRA	HRA	240.00	2,000.00	0.00	Split	0.00000	$0.00
Default Work Classification	Bricklayers Pension DB	BPEN	240.00	2,000.00	240.00	Hours	12.28000	$2,947.20
Default Work Classification	Cement Workers Pension DB	CPEN	240.00	2,000.00	240.00	Hours	0.00000	$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

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Enter a New Form - Pay Invoice(s)

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Pending Payment

Select Contractor: ▓▓▓▓▓▓▓▓▓ ▾   **Invoice Number:** [_____]

* **Invoice Begin Date:** 11/1/2022 ▾   * **Invoice End Date:** 11/30/2022 ▾

[Search] [Clear]

Employers submit contributions (summary sheets, forms and payments) monthly. 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 last day of the month in which the contributions were due. Pursuant to the Collection Procedures, all payments received past the due date of the contribution are subject to liquidated damages beginning the first day after the due date of the contributions.

Pending Invoice:

[Select Invoice] [Cancel]

☐	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
☑	CW22-00000006	11/30/2022	B1	Bricklayer - LMCC Journeyman/Foreman	00000	$6,120.00	DemoContractor	12/22/2022
☐	CW22-00000005	11/30/2022	B1	Bricklayer - LMCC Journeyman/Foreman	00000	$6,120.00	DemoContractor	12/22/2022

[Select Invoice] [Cancel]

- **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.**

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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)

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Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW22-00000006	11/30/2022	Bricklayer - LMCC Journeyman/Foreman	00000	$6,120.00
TOTAL				**$6,120.00**

Total Invoice Amount : $6,120.00

Invoice Adjustment Amount: $0.00

Total Amount Due: $6,120.00

Adjustment Reason:

Pay By: ⦿ **ACH(Online)**   ○ **Check**

[Submit] [Cancel] [Back]

- **Clicking <u>Make Payment</u> 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 <u>Invoice Adjustment Amount</u> 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 <u>Total Amount Due</u>.**
  - **When an adjustment amount is entered, you are required to also enter the reason for the adjustment in the <u>Adjustment Reason</u> box (e.g. Liquidated Damages or Over/Under payment from a prior period).**

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Enter a New Form - Pay Invoice(s)

Total Invoice Amount: $6,120.00

Invoice Adjustment Amount: $0.00

Total Amount Due: $6,120.00

Adjustment Reason:

Pay By: ● ACH(Online) ○ Check

Submit   Cancel   Back

- **Now select your Pay By type**
  - o **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.**

Select Contractor: INC

* Routing Number:

* Bank Account Number:

* Account Type: ● Checking ○ Saving

Bank Name:

W2KFJG

Get New Image

* Please enter the characters as shown in the image.

Submit   Cancel

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Enter a New Form - Pay Invoice(s)

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ACH Payment

Employers submit contributions (summary sheets, forms and payments) monthly. 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 last day of the month in which the contributions were due. Pursuant to the Collection Procedures, all payments received past the due date of the contribution are subject to liquidated damages beginning the first day after the due date of the contributions.

Total Amount Due:	**$6,120.00**
Bank Account Number: (Last 4 digits)	███████████████
Routing Number: (Last 4 digits)	███████████████
Bank Name:	███████████████
Account Type:	Checking
Settlement Date:	12/27/2022 ▾

Edit Account   Submit   Cancel

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

- o **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.

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Modify A Saved Contribution Form

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: ▅▅▅▅▅▅▅▅▅▅ ▾

Work Start Date: 11/1/2022 ▾   **Work End Date:** 11/30/2022 ▾

Process Contribution: Enter New Contribution ▾

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

CBA: ☐ **Report no Hours**

    Submit   Cancel

- **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:	_____ INC ∨
Process Contribution:	Modify / Submit Saved Contribution ∨
***Batch Number:**	Batch Number | CBA | Work StartDate | Work EndDate 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 <u>Submit</u> button.**
3. **The rest of the process is the same as entering a new contribution form (refer to instructions above).**

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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 (DFLT = Default)	Last Name	First Name	MI	Hours Worked	Gross Wages
	A	B	C	D	E	F	G
1	123451234	DFLT	Hill	John	Q	100	4000
2	123452345	DFLT	Smith	Jill	P	125	5000

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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. The fund's currently active work classes are listed below:

Code	△	Description
132		PRODUCTION C
COLL		Collection
DFLT		Default Work Classification
FORE		Foreman
GFOR		General Foreman
JRNY		JOURNEYMAN

Upload a Contribution File

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us

Contribution Entry Form

Contribution Batch

Contractor Name:	Test Contractor	**Contractor Number:**	00000
Batch Number:	CW23-00000021	**Work End Date:**	01/31/2023
CBA:	B1 - Bricklayer - LMCC Journeyman/Foreman		

✎ 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	Gross Wages	Delete?
1	123451234	DEFAULT WORK CLASSIFICATION ▾	John	Q	Hill	100.00	4000.00	☐
2	123452345	DEFAULT WORK CLASSIFICATION ▾	Jill	P	Smith	125.00	5000.00	☐
3		DEFAULT WORK CLASSIFICATION ▾				0.00	0.00	☐

- **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).**

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Copy/Modify Previous Report Form

- **If you select <u>Copy / Modify Previous Report Form</u> 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 <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. **From the <u>Invoice Number</u> 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 <u>Submit</u> 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 <u>View All Contributions</u> link as shown above.**

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How to View Past Contribution Forms

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us

View All Contributions

Select Contractor: [Select Contractor ⌄]   **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.

- **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).**

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How to View Past Contribution Forms

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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		INC	$6,513.60	Pending			DemoContractor	09/30/2020	☐
CW20-00000010	08/31/2020	00	BTE AGREEMENTS	2		INC	$6,513.60	Pending			DemoContractor	09/30/2020	☐
CW20-00000009	08/31/2020	00	BTE AGREEMENTS	2		INC	$6,513.60	Pending	ACH	10/02/2020	DemoContractor	09/30/2020	☐

[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.**

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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 <u>Make a Payment</u> (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 <u>Invoice Begin</u> and <u>Invoice End</u> 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 <u>Select Invoice</u> 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) 828-6000 or (800) 435-4080 and ask to speak with someone from our Contributions Team.