

IUPAT Combined 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.IUPATDC57Employers.org

IUPAT Combined Funds

Home Electronic Contribution Employer Information News Contact Us

Introduction

You now have the power to access information 24 hours 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.

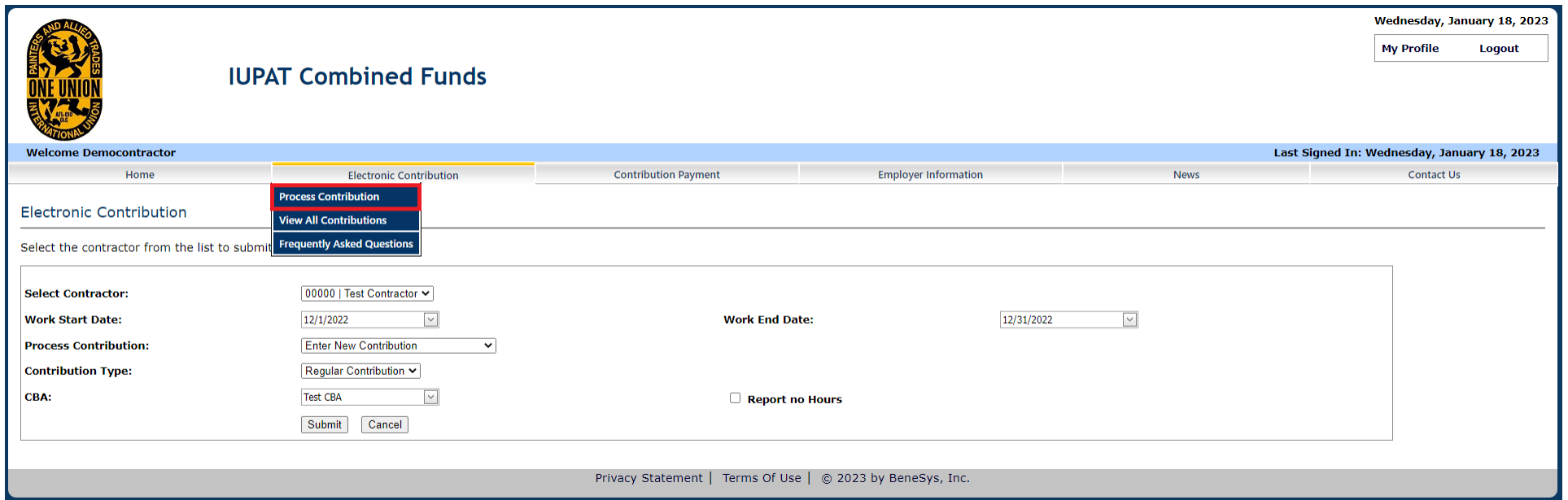
News / Events

No news is available.

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- **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 (330) 779-8865 or (833) 697-1294, where someone will assist you.**

Let's Get Started



Wednesday, January 18, 2023

My Profile Logout

IUPAT Combined Funds

Welcome Democontractor Last Signed In: Wednesday, January 18, 2023

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

Electronic Contribution

Select the contractor from the list to submit

Process Contribution
View All Contributions
Frequently Asked Questions

Select Contractor: 00000 | Test Contractor ▼

Work Start Date: 12/1/2022 ▼ Work End Date: 12/31/2022 ▼

Process Contribution: Enter New Contribution ▼

Contribution Type: Regular Contribution ▼

CBA: Test CBA ▼ Report no Hours

Submit Cancel

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- 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

The screenshot shows the IUPAT Combined Funds web application. At the top left is the IUPAT logo. The page title is "IUPAT Combined Funds". The date is "Wednesday, January 18, 2023". There are links for "My Profile" and "Logout". A navigation bar includes "Home", "Electronic Contribution" (highlighted), "Contribution Payment", "Employer Information", "News", and "Contact Us". Below the navigation bar, the page is titled "Electronic Contribution" and instructs the user to "Select the contractor from the list to submit your contributions". The form contains the following fields and options:

- Select Contractor:** 00000 | Test Contractor
- Work Start Date:** 12/1/2022
- Work End Date:** 12/31/2022
- Process Contribution:** Enter New Contribution
- Contribution Type:** Enter New Contribution, Modify / Submit Saved Contribution, Upload Contribution File, Copy / Modify Previous Report Form
- CBA:** (empty)
- Report no Hours
- Buttons: Submit, Cancel

At the bottom of the page, there are links for "Privacy Statement", "Terms Of Use", and "© 2023 by BeneSys, Inc."

- **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


The screenshot shows the IUPAT Combined Funds web application. At the top left is the IUPAT logo. The page title is "IUPAT Combined Funds". The date "Wednesday, January 18, 2023" is displayed in the top right. Below the title is a navigation bar with tabs: Home, Electronic Contribution (selected), Contribution Payment, Employer Information, News, and Contact Us. The main content area is titled "Electronic Contribution" and contains the instruction "Select the contractor from the list to submit your contributions". The form includes the following fields and options:

- Select Contractor: 00000 | Test Contractor
- Work Start Date: 12/1/2022
- Work End Date: 12/31/2022
- Process Contribution: Enter New Contribution
- Contribution Type: Regular Contribution
- CBA: Test CBA
- Report no Hours
- Submit and Cancel buttons

At the bottom of the page, there is a footer with links for "Privacy Statement" and "Terms Of Use", and a copyright notice: "© 2023 by BeneSys, Inc."

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



IUPAT Combined Funds

Wednesday, January 18, 2023

[My Profile](#) [Logout](#)

Welcome Democontractor
Last Signed In: Wednesday, January 18, 2023

Home
Electronic Contribution
Contribution Payment
Employer Information
News
Contact Us

Contribution Entry Form

Contribution Batch

Contractor Name:	Test Contractor	Contractor Number:	00000
Batch Number:	CW23-00000007	Work End Date:	12/31/2022
CBA:	T2006 - Test CBA		

[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	Regular	Over Time	Double Time	Gross Wages	Flat Rate	Delete?
1	123456789	DRYWALL APPRENTICE 50% ▾				20	10	5	50	0.00	<input type="checkbox"/>
2	987654321	DRYWALL APPRENTICE 50% ▾				40	0.00	0.00	100	1	<input type="checkbox"/>
3		DRYWALL APPRENTICE 50% ▾				0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

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- 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 Regular amounts, Over Time amounts, Double Time amounts, Gross Wages amounts, and Flat Rate amounts in the appropriate fields.
- 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



IUPAT Combined Funds

Wednesday, January 18, 2023

[My Profile](#) [Logout](#)

Welcome Democontractor

Last Signed In: Wednesday, January 18, 2023

[Home](#)

[Electronic Contribution](#)

[Contribution Payment](#)

[Employer Information](#)

[News](#)

[Contact Us](#)

Process Contribution

Contribution Batch

Contractor Name:	Test Contractor	Contractor Number:	00000
Batch Number:	CW23-00000007	Work End Date:	12/31/2022
CBA:	T2006 - Test CBA		

Contractor Contribution Details:

Work Class	Contractor	Regular	Over Time	Double Time	Gross Wages	Flat Rate	Amount
Drywall Apprentice 50%	Test Contractor	60.00	10.00	5.00	150.00	1.00	\$1,546.80 View Details
TOTAL		60.00	10.00	5.00	150.00	1.00	\$1,546.80

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Regular	Over Time	Double Time	Gross Wages	Flat Rate	Amount
987654321	Drywall Apprentice 50%	Joseph		Daniels	40.00	0.00	0.00	100.00	1.00	\$730.50 View Details
123456789	Drywall Apprentice 50%	Larry		Luke	20.00	10.00	5.00	50.00	0.00	\$816.30 View Details
TOTAL					60.00	10.00	5.00	\$150.00	1.00	\$1,546.80

[Back](#) [Finalize Contribution](#) [Cancel](#)

- The [View Details](#) link under Contractor Contribution Details will show you a breakdown of all calculated fringes
 - See next page in user guide
- The [View Details](#) link under Employee Contribution Details will show you a breakdown of all calculated fringes for that particular employee
 - See page after next in user guide
- 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: Test Contractor

Fund Name	Units	Basis	Rates	Amount
Dues Percentage	150.00	Gross Wages	0.04500	\$6.75
Builder Guild	450.00	Hours Worked	0.02000	\$9.00
CIAP	450.00	Hours Worked	0.00000	\$0.00
GLZ SUB	450.00	Hours Worked	0.00000	\$0.00
Glaziers	450.00	Hours Worked	0.00000	\$0.00
INT Admin	450.00	Hours Worked	0.10000	\$45.00
DC57 ORG	450.00	Hours Worked	0.15000	\$67.50
Health & Welfare	685.00	Hours Paid	11.55000	\$7,911.75
Ann DC Fund	685.00	Hours Paid	2.59000	\$1,774.15
Nat Pen	685.00	Hours Paid	4.47000	\$3,061.95
CAP	685.00	Hours Paid	0.05000	\$34.25
Industry	685.00	Hours Paid	0.10000	\$68.50
JATF	685.00	Hours Paid	0.70000	\$479.50
LMCF	685.00	Hours Paid	0.18000	\$123.30
NAT JATF	685.00	Hours Paid	0.10000	\$68.50
Nat LMCF	685.00	Hours Paid	0.10000	\$68.50
NAT PAC	685.00	Hours Paid	0.05000	\$34.25
MRA	685.00	Hours Paid	0.00000	\$0.00
Admin Fee	0.00	Split	0.07000	\$0.00
Builder Fund	0.00	Split	0.14000	\$0.00
WRA	0.00	Split	0.00000	\$0.00
				Total: \$13,752.90

Close

This screen will show the breakdown of funds, units, their rates, and amounts to be paid for the selected work class.

Enter a New Form - Contractor Details

Employee Contribution Details

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

Fund	Units	Basis	Rate	Amount
Health & Welfare	685.00	Hours Paid	11.55000	\$7,911.75
Ann DC Fund	685.00	Hours Paid	2.59000	\$1,774.15
Nat Pen	685.00	Hours Paid	4.47000	\$3,061.95
Admin Fee	0.00	Split	0.07000	\$0.00
Builder Fund	0.00	Split	0.14000	\$0.00
Builder Guild	450.00	Hours Worked	0.02000	\$9.00
CAP	685.00	Hours Paid	0.05000	\$34.25
CIAP	450.00	Hours Worked	0.00000	\$0.00
Dues Percentage	150.00	Gross Wages	0.04500	\$6.75
GLZ SUB	450.00	Hours Worked	0.00000	\$0.00
Glaziers	450.00	Hours Worked	0.00000	\$0.00
Industry	685.00	Hours Paid	0.10000	\$68.50
JATF	685.00	Hours Paid	0.70000	\$479.50
LMCF	685.00	Hours Paid	0.18000	\$123.30
NAT JATF	685.00	Hours Paid	0.10000	\$68.50
Nat LMCF	685.00	Hours Paid	0.10000	\$68.50
INT Admin	450.00	Hours Worked	0.10000	\$45.00
DC57 ORG	450.00	Hours Worked	0.15000	\$67.50
NAT PAC	685.00	Hours Paid	0.05000	\$34.25
WRA	0.00	Split	0.00000	\$0.00
MRA	685.00	Hours Paid	0.00000	\$0.00
Total:				\$13,752.90

This screen will show the breakdown of funds, units, their rates, and amounts to be paid for the individual employee.

Enter a New Form - Finalize Contributions

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Contribution Batch

Contractor Name: Test Contractor Contractor Number: 00000
 Batch Number: CW23-0000007 Work End Date: 12/31/2022
 CBA: T2006 - Test CBA

INVOICE # CW23-0000005

Your Calculated Contributions for work ending 12/31/2022: **\$1,546.80**
 Remittance Amount Due: **\$1,546.80**
 Invoice #: **CW23-0000005**
 * 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: **01/18/2023**

Amount Due:

Work Class	Fund	Fund Code	Regular	Over Time	Double Time	Gross Wages	Flat Rate	Calc Hrs	Basis	Rate	Amount
Drywall Apprentice 50%	Health & Welfare	Healt	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	11.55000	\$981.75
Drywall Apprentice 50%	Ann DC Fund	PenDC	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	1.85000	\$157.25
Drywall Apprentice 50%	Nat Pen	PenDB	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	3.20000	\$272.00
Drywall Apprentice 50%	Admin Fee	ADM	60.00	10.00	5.00	150.00	1.00	0.00	Split	0.07000	\$0.00
Drywall Apprentice 50%	Builder Fund	BF	60.00	10.00	5.00	150.00	1.00	0.00	Split	0.14000	\$0.00
Drywall Apprentice 50%	Builder Guild	BG	60.00	10.00	5.00	150.00	1.00	75.00	Hours Worked	0.02000	\$1.50
Drywall Apprentice 50%	CAP	CAP	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.05000	\$4.25
Drywall Apprentice 50%	CIAP	CIAP	60.00	10.00	5.00	150.00	1.00	75.00	Hours Worked	0.00000	\$0.00
Drywall Apprentice 50%	Dues Percentage	Dues%	60.00	10.00	5.00	150.00	1.00	150.00	Gross Wages	0.04500	\$6.75
Drywall Apprentice 50%	GLZ SUB	GLZDU	60.00	10.00	5.00	150.00	1.00	75.00	Hours Worked	0.00000	\$0.00
Drywall Apprentice 50%	Glaziers	GLZ	60.00	10.00	5.00	150.00	1.00	75.00	Hours Worked	0.00000	\$0.00
Drywall Apprentice 50%	Industry	IND	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.10000	\$8.50
Drywall Apprentice 50%	JATF	JATF	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.70000	\$59.50
Drywall Apprentice 50%	LMCF	LMCF	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.18000	\$15.30
Drywall Apprentice 50%	NAT JATF	NJATF	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.10000	\$8.50
Drywall Apprentice 50%	Nat LMCF	NLMC	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.10000	\$8.50
Drywall Apprentice 50%	INT Admin	NORG	60.00	10.00	5.00	150.00	1.00	75.00	Hours Worked	0.10000	\$7.50
Drywall Apprentice 50%	DC57 ORG	ORG	60.00	10.00	5.00	150.00	1.00	75.00	Hours Worked	0.15000	\$11.25
Drywall Apprentice 50%	NAT PAC	PAC	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.05000	\$4.25
Drywall Apprentice 50%	WRA	WRA	60.00	10.00	5.00	150.00	1.00	0.00	Split	0.00000	\$0.00
Drywall Apprentice 50%	MRA	MRA	60.00	10.00	5.00	150.00	1.00	85.00	Hours Paid	0.00000	\$0.00
TOTAL											\$1,546.80

Employee Details:

Name	Work Class	R	OT	DT	GW	F	Healt	PenDC	PenDB	ADM	BF	BG	CAP	CIAP	Dues%	GLZDU	GLZ	IND
Daniels, Joseph	Drywall Apprentice 50%	40.00	0.00	0.00	\$100.00	1.00	\$462.00	\$74.00	\$128.00	\$0.00	\$0.00	\$0.80	\$2.00	\$0.00	\$4.50	\$0.00	\$0.00	\$4.00
Luke, Larry	Drywall Apprentice 50%	20.00	10.00	5.00	\$50.00	0.00	\$519.75	\$83.25	\$144.00	\$0.00	\$0.00	\$0.70	\$2.25	\$0.00	\$2.25	\$0.00	\$0.00	\$4.50
TOTAL		60.00	10.00	5.00	\$150.00	1.00	\$981.75	\$157.25	\$272.00	\$0.00	\$0.00	\$1.50	\$4.25	\$0.00	\$6.75	\$0.00	\$0.00	\$8.50

- 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: 00000 | Test Contractor ▾ Invoice Number:

* Invoice Begin Date: 12/18/2022 ▾ * Invoice End Date: 1/18/2023 ▾

Employers submit contributions (summary sheets, forms and payments) monthly. In accordance with the Collection Policy, contribution reports and payments are due on the 15th of the month following the work month, unless specified otherwise in your Collective Bargaining Agreement (CBA). They are considered delinquent if not received by the 15th of the month following the work month. Pursuant to the Collection Procedures adopted by the Trustees of the IUPAT District Council 57 Western PA, all payments received past the due date of the contribution are subject to both (a) liquidated damages equal to 10% of the contributions due and (b) interest at a rate of 12% per annum of the contributions due until all contributions are received, or (c) liquidated damages and interest applicable as specified in your CBA.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW23-00000005	12/31/2022	T2006	Test CBA	00000	\$1,546.80	DemoContractor	01/18/2023

- 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)

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

Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: \$1,546.80

Make Payment Edit Selection

Select Contractor: 00000 | Test Contractor Invoice Number:

* Invoice Begin Date: 12/18/2022 * Invoice End Date: 1/18/2023

Search Clear

Employers submit contributions (summary sheets, forms and payments) monthly. In accordance with the Collection Policy, contribution reports and payments are due on the 15th of the month following the work month, unless specified otherwise in your Collective Bargaining Agreement (CBA). They are considered delinquent if not received by the 15th of the month following the work month. Pursuant to the Collection Procedures adopted by the Trustees of the IUPAT District Council 57 Western PA, all payments received past the due date of the contribution are subject to both (a) liquidated damages equal to 10% of the contributions due and (b) interest at a rate of 12% per annum of the contributions due until all contributions are received, or (c) liquidated damages and interest applicable as specified in your CBA.

Pending Invoice: Select Invoice Cancel

<input checked="" type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW23-000000005	12/31/2022	T2006	Test CBA	00000	\$1,546.80	DemoContractor	01/18/2023

Select Invoice Cancel

- 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
CW23-00000005	12/31/2022	Test CBA	00000	\$1,546.80
TOTAL				\$1,546.80

Total Invoice Amount : **\$1,546.80**

Invoice Adjustment Amount:

Total Amount Due: **\$1,546.80**

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
CW23-00000005	12/31/2022	Test CBA	00000	\$1,546.80
TOTAL				\$1,546.80

Total Invoice Amount : **\$1,546.80**

Invoice Adjustment Amount:

Total Amount Due: **\$1,546.80**

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.


Select Contractor: NC

* Routing Number:

* Bank Account Number:

* Account Type: Checking Saving

Bank Name:



* Please enter the characters as shown in the image.

Enter a New Form - Pay Invoice(s)

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

Employers submit contributions (summary sheets, forms and payments) monthly. In accordance with the Collection Policy, contribution reports and payments are due on the 15th of the month following the work month, unless specified otherwise in your Collective Bargaining Agreement (CBA). They are considered delinquent if not received by the 15th of the month following the work month. Pursuant to the Collection Procedures adopted by the Trustees of the IUPAT District Council 57 Western PA, all payments received past the due date of the contribution are subject to both (a) liquidated damages equal to 10% of the contributions due and (b) interest at a rate of 12% per annum of the contributions due until all contributions are received, or (c) liquidated damages and interest applicable as specified in your CBA.

Total Amount Due: **\$1,546.80**

Bank Account Number: (Last 4 digits)

Routing Number: (Last 4 digits)

Bank Name:

Account Type: Checking

Settlement Date:

*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.**

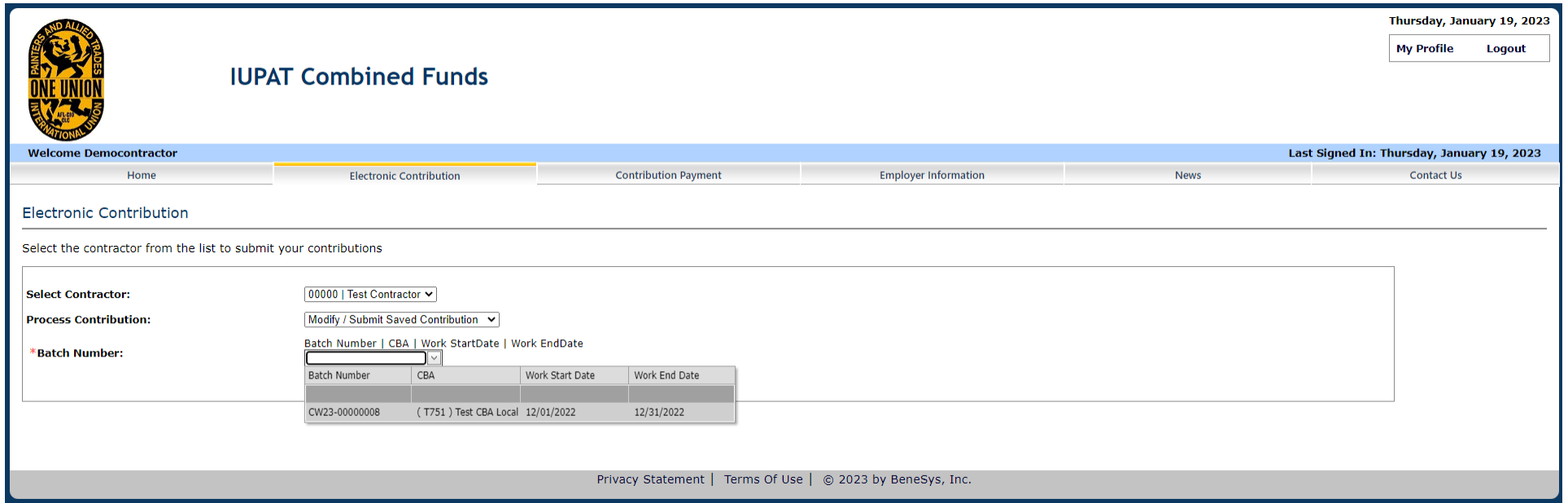
If you select to pay by check, after you click Submit on the Make a Payment screen, you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check.

Modify A Saved Contribution Form

The screenshot shows the IUPAT Combined Funds web application interface. At the top left is the IUPAT logo. The page title is "IUPAT Combined Funds". The date "Thursday, January 19, 2023" is displayed in the top right corner. Below the logo, there is a navigation bar with "Welcome Democontractor" on the left and "Last Signed In: Thursday, January 19, 2023" on the right. The main navigation menu includes "Home", "Electronic Contribution", "Contribution Payment", "Employer Information", "News", and "Contact Us". The "Electronic Contribution" page is active, showing a heading "Electronic Contribution" and a sub-heading "Select the contractor from the list to submit your contributions". The form contains several fields: "Select Contractor:" with a dropdown menu showing "00000 | Test Contractor"; "Work Start Date:" with a date picker set to "12/1/2022"; "Work End Date:" with a date picker set to "12/31/2022"; "Process Contribution:" with a dropdown menu showing "Enter New Contribution"; "Contribution Type:" with a dropdown menu showing "Enter New Contribution", "Modify / Submit Saved Contribution" (highlighted in red), "Upload Contribution File", and "Copy / Modify Previous Report Form"; and "CBA:" with a checkbox for "Report no Hours". At the bottom of the form are "Submit" and "Cancel" buttons. The footer contains "Privacy Statement | Terms Of Use | © 2023 by BeneSys, Inc."

- 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



The screenshot shows the IUPAT Combined Funds web application. At the top left is the IUPAT logo. The page title is "IUPAT Combined Funds". In the top right corner, the date "Thursday, January 19, 2023" is displayed, along with "My Profile" and "Logout" links. Below the header is a navigation bar with tabs: "Home", "Electronic Contribution" (which is highlighted), "Contribution Payment", "Employer Information", "News", and "Contact Us". The main content area is titled "Electronic Contribution" and contains the instruction "Select the contractor from the list to submit your contributions". Below this instruction are three dropdown menus: "Select Contractor:" with the value "00000 | Test Contractor", "Process Contribution:" with the value "Modify / Submit Saved Contribution", and "* Batch Number:" with a dropdown menu. Below the "* Batch Number:" dropdown is a table with the following data:

Batch Number	CBA	Work Start Date	Work End Date
CW23-00000008	(T751) Test CBA Local	12/01/2022	12/31/2022

At the bottom of the page, there are links for "Privacy Statement" and "Terms Of Use", and a copyright notice "© 2023 by BeneSys, Inc."

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

- 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 Browse 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 Name	First Name	Middle Initial	Regular	Over Time	Double Time	Gross Wages	Flat Rates
	A	B	C	D	E	F	G	H	I	J
1	123256789	DRJ	Doe	John	L	100	30	10	250	0
2	147258369	DRAP70	Doe	Jane	M	140	150	160	150	0

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.

APCC	Apprentice Construction Council
APGE	Apprentice Glass Erector
APNC	Apprentice Non-construction
APPR	Apprentice
COLL	Collection
COLL	Collection
DFLT	Default Work Classification
DRAP50	Drywall Apprentice 50%
DRAP60	Drywall Apprentice 60%
DRAP70	Drywall Apprentice 70%
DRAP80	Drywall Apprentice 80%
DRAP90	Drywall Apprentice 90%
DRJ	Drywall Journeyman
FORE	Foreman
GALL	Group All
GFOR	General Foreman
JCC	Journeyman Construction Council
JNC	Journeyman Non-Construction
JRGE	Journeyman Glass Erector
JRNY	JOURNEYMAN
MC	80% HCA, 20% WRA
MDV	Meadville

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:	CW23-0000013	Work End Date:	12/31/2022
CBA:	T2006 - Test CBA		

[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	Regular	Over Time	Double Time	Gross Wages	Flat Rate	Delete?
1	123256789	DRYWALL JOURNEYMAN	John	L	Doe	100.00	30.00	10.00	250.00	0.00	<input type="checkbox"/>
2	147258369	DRYWALL APPRENTICE 70%	Jane	M	Doe	140.00	150.00	160.00	150.00	0.00	<input type="checkbox"/>
3		DRYWALL APPRENTICE 50%				0.00	0.00	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 a web application interface for 'Electronic Contribution'. At the top, there is a navigation bar with tabs: Home, Electronic Contribution (active), Contribution Payment, Employer Information, News, and Contact Us. Below the navigation bar, the page title is 'Electronic Contribution'. The main content area contains the following fields and options:

- Select Contractor:** A dropdown menu with '00000 | Test Contractor' selected.
- Work Start Date:** A date picker with '12/1/2022' selected.
- Work End Date:** A date picker with '12/31/2022' selected.
- Process Contribution:** A dropdown menu with 'Copy / Modify Previous Report Form' selected. The dropdown list includes: 'Copy / Modify Previous Report Form', 'Enter New Contribution', 'Modify / Submit Saved Contribution', and 'Upload Contribution File'.
- * Invoice Number:** A field with a red asterisk and a link: 'Check here to zero out hours and amounts from previous period'.
- Submit and Cancel buttons:** Located at the bottom of the 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

The screenshot displays the BeneSys web application interface. At the top, there is a navigation menu with tabs for Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. The 'Electronic Contribution' tab is active, and a dropdown menu is open, showing three options: 'Process Contribution', 'View All Contributions', and 'Frequently Asked Questions'. The 'View All Contributions' option is highlighted with a red box. Below the navigation menu, the page title is 'Electronic Contribution'. Underneath, there is a prompt: 'Select the contractor from the list to submit'. The main content area contains a form with the following fields: 'Select Contractor:' with a dropdown menu showing '00000 | Test Contractor'; 'Work Start Date:' with a date picker set to '12/1/2022'; 'Work End Date:' with a date picker set to '12/31/2022'; 'Process Contribution:' with a dropdown menu showing 'Enter New Contribution'; 'Contribution Type:' with a dropdown menu showing 'Regular Contribution'; and 'CBA:' with a dropdown menu showing 'Test CBA'. There are also 'Submit' and 'Cancel' buttons at the bottom of the form. A checkbox labeled 'Report no Hours' is also present. At the bottom of the page, there is a footer with links for 'Privacy Statement', 'Terms Of Use', and '© 2023 by BeneSys, Inc.'

- 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: Begin Date: End Date:

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).**

How to View Past Contribution Forms

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us
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View All Contributions

Select Contractor: Begin Date: End Date:

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
CW23-00000005	12/31/2022	T2006	Test CBA	2	00000	Test Contractor	\$1,546.80	Pending	ACH	01/20/2023	DemoContractor	01/18/2023	
CW23-00000004	12/31/2022	T2006	Test CBA	2	00000	Test Contractor	\$1,961.21	Pending	ACH	01/20/2023	DemoContractor	01/17/2023	
CW23-00000003	12/31/2022	T2006	Test CBA	2	00000	Test Contractor	\$1,844.24	Pending	CHK		DemoContractor	01/17/2023	<input type="checkbox"/>

- 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 portal interface. At the top, there is a navigation bar with tabs for Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. The 'Contribution Payment' tab is active, and a dropdown menu is open, showing four options: 'Make a Payment' (highlighted with a red box), 'View All Payment', 'Account Management', and 'Make Variance Payment'. The main content area on the left contains an 'Introduction' section with instructions on how to navigate the site and log in. On the right, there is a 'News / Events' section with the text 'No news is available.' At the bottom of the page, there is a footer with links for 'Privacy Statement' and 'Terms Of Use', and a copyright notice for BeneSys, Inc. © 2023.

- **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: 00000 | Test Contractor ▼ Invoice Number:

* Invoice Begin Date: 12/19/2022 ▼ * Invoice End Date: 1/19/2023 ▼

Employers submit contributions (summary sheets, forms and payments) monthly. In accordance with the Collection Policy, contribution reports and payments are due on the 15th of the month following the work month, unless specified otherwise in your Collective Bargaining Agreement (CBA). They are considered delinquent if not received by the 15th of the month following the work month. Pursuant to the Collection Procedures adopted by the Trustees of the IUPAT District Council 57 Western PA, all payments received past the due date of the contribution are subject to both (a) liquidated damages equal to 10% of the contributions due and (b) interest at a rate of 12% per annum of the contributions due until all contributions are received, or (c) liquidated damages and interest applicable as specified in your CBA.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input type="checkbox"/>	CW23-00000007	12/31/2022	T751	Test CBA Local	00000	\$2,955.15	DemoContractor	01/19/2023
<input type="checkbox"/>	CW23-00000006	12/31/2022	T2006	Test CBA	00000	\$17,583.75	DemoContractor	01/19/2023

- 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 (330) 779-8865 or (833) 697-1294 and ask to speak with someone from our Contributions Team.