



Steamfitters Local Union 464 Electronic Contribution Website Quick Start Guide

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:

http://www.464employers.org



Steamfitters Local Union 464 Electronic Contributions

Login
Tuesday, September 12, 2017

* User Name:

* Password:

Login

[Create an Account](#) [Forgot Password?](#)

- To log into this site, you will need a user ID and Password. To receive this, you will need to register by clicking on the “Create an Account” option in the top right corner of the website. To complete this step you will need a 16 digit identification number. This will be provided in a separate letter to be mailed to the address we have on file.
- A second option is to call (855) 725-3551 and ask for Sara Nelson.

Lets Get Started

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. The 'Electronic Contribution' tab is active. Below the navigation bar, there is a dropdown menu with three options: 'Process Contribution' (highlighted with a red border), 'View All Contributions', and 'Frequently Asked Questions'. Below the dropdown, the text 'Select the contractor from the dropdown menu' is visible. The main content area contains a form with the following fields and controls:

- Select Contractor:** A dropdown menu with a blue bar and a downward arrow.
- Work Start Date:** A date input field containing '8/1/2017' and a downward arrow.
- Work End Date:** A date input field containing '8/31/2017' and a downward arrow.
- Process Contribution:** A dropdown menu containing 'Enter New Contribution' and a downward arrow.
- Contribution Type:** A dropdown menu containing 'Regular Contribution' and a downward arrow.
- CBA:** A dropdown menu containing 'ALL FUNDS' and a downward arrow.
- Report no Hours**
- Submit** and **Cancel** buttons.

- To begin entering employee contribution information, click on the Electronic Contribution Tab and select Process Contribution as shown above.
 - This option will allow you to create and process contributions.

Processing Contributions

Select Contractor:

Work Start Date:

Process Contribution:

Contribution Type:

CBA:

- **Enter New Contribution** – This option allows Manual Data Entry of your Contribution Form.
- **Modify/Submit Saved Contribution** – This option allows you to retrieve a previously entered and saved Contribution Form.
- **Upload Contribution File** – This option allows you to upload a data file exported from your payroll system (CSV format) directly into the system; it will automatically load Employee, hours and gross information.
- **Copy/Modify Previous Report Form** – This option will allow you to retrieve a Contribution Form submitted for a previous month and copy the information for the current months Contribution Form.

Entering a New Form

Select Contractor:

Work Start Date: Work End Date:

Process Contribution:

Contribution Type:

CBA: Report no Hours

1. Select the Contractor: If you only submit Contributions for one Contractor that will show as your default and you won't have any other options. If you have a Login that allows you to submit Contributions for Multiple Contractors, click on the down-arrow and a list of Contractors you submit for will show, select 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 Ending 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 for, this will apply the appropriate fringe rates.

Enter a New Form - Contribution Entry

Contribution Entry Form

Contribution Batch			
Contractor Name:	<input type="text"/>	Contractor ID:	OS0368
Batch Number:	CW17-00000145	Work End Date:	08/31/2017
CBA:	01_OS - ALL FUNDS		

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

*Contact the Benefit Office to add new Work Classifications

Row No	SSN	Work Class	First Name	MI	Last Name	Gross Wages	Monthly (Flat Rate)	Regular Hours	Overtime	Double	Delete?
2		AREA FOREMAN				0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

- This screen allows you to enter and verify the information for each employee. Employee information will automatically populate once you have entered the Social Security Number and Tab across the fields. New Employee's information will need to be manually entered in each field.
- Your agreement will determine the fields you need to enter. Blank amounts are not allowed.
- You can select Save and Complete Later if you need to do something else and come back later to finish your contribution entry, this saves what you have currently input and lets you pick up where you left off.
- Once all employee's hours and wages are entered, click on Calculate Contribution, and the following screen shows.

Enter a New Form – Calculate Contributions

Process Contribution

Contribution Batch			
Contractor Name:	[REDACTED]	Contractor ID:	OS0368
Batch Number:	CW17-00000145	Work End Date:	08/31/2017
CBA:	01_OS - ALL FUNDS		

Contractor Contribution Details:

Work Class	Contractor	Gross Wages	Monthly (Flat Rate)	Regular Hours	Overtime	Double	Amount	
AREA FOREMAN	[REDACTED]	400.00	8.50	50.00	15.00	10.00	\$1,942.16	View Details
TOTAL		400.00	8.50	50.00	15.00	10.00	\$1,942.16	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Gross Wages	Monthly (Flat Rate)	Regular Hours	Overtime	Double	Amount	
12345678	[REDACTED]	Mouse	M	Mickey	400.00	8.50	50.00	15.00	10.00	\$1,942.16	View Details
TOTAL					400.00	8.50	50.00	15.00	10.00	\$1,942.16	

- Screen allows you to see how fringes are calculated, you are also allowed to make modifications from this screen
 - Contractor Contribution Details [View Details](#) button shows screen with breakdown of calculated fringes
 - Employee Contribution Details [View Details](#) button shows fringes calculated for that Employee.
- **Back** button, click this to go back to prior screen and adjust contributions information. At no time should you use the browser to return to the previous page (back arrow in upper left corner of browser window), that will cause all previously entered information to be lost.
- When you agree with all the information choose **Finalize Contribution** button, once you select this you cannot go back and make any changes, so make sure everything is correct before Finalizing.

Enter a New Form - Pay Invoice(s)

Pending Payment

Select Contractor:	OS0118 RAY MARTIN COMPANY	Invoice Number:	
* Invoice Begin Date:	9/12/2017	* Invoice End Date:	10/12/2017
<input type="button" value="Search"/>		<input type="button" value="Clear"/>	

All employers must submit their Fringe Benefit Report and payment no later than the 15th day of the month following the calendar month in which the hours were worked. Liquidation damages of 10% plus interest will be imposed if payment is not received by the 3rd business day after the due date.

Pending Invoice:

								 <input type="button" value="Select Invoice"/>	<input type="button" value="Cancel"/>
<input checked="" type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date	
<input checked="" type="checkbox"/>	CW17-00000034	08/31/2017	01_OS	ALL FUNDS	OS0368	\$1,942.16	DemoContractor	09/12/2017	
								<input type="button" value="Select Invoice"/>	<input type="button" value="Cancel"/>

- After selecting Pay Now you will be directed to the Pending Payments page. Press the “Search” button to display any pending invoices. Please pay for Pension and Healthcare invoices together. The search button will show all Contribution Forms entered on the website that have not been paid for. Here, you will select the Open Invoice(s) which you would like to remit a payment for (ACH or Check).
- Once you check the box(es) to the left of the invoice(s) desired, click the Select Invoice button.

Enter a New Form - Pay Invoice(s)

Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: \$1,942.16

Make Payment Edit Selection

Select Contractor: OS0118 | RAY MARTIN COMPANY Invoice Number:

* Invoice Begin Date: 9/12/2017 * Invoice End Date: 10/12/2017

Search Clear

All employers must submit their Fringe Benefit Report and payment no later than the 15th day of the month following the calendar month in which the hours were worked. Liquidation damages of 10% plus interest will be imposed if payment is not received by the 3rd business day after the due date.

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"/>	CW17-00000034	08/31/2017	01_OS	ALL FUNDS	OS0368	\$1,942.16	DemoContractor	09/12/2017

Select Invoice Cancel

- This screen will show selected invoice(s) highlighted in orange. The top left portion of the screen will also provide a “Payment Summary” section which shows the total amount due for the selected Invoice(s).
- If the amount is okay, please select Make Payment.
 - Use the Edit Selection option if you selected the wrong Invoice(s).

Enter a New Form - Pay Invoice(s)

Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW20-00000003	03/31/2020	ALL FUNDS	OS0131	\$3,931.36
TOTAL				\$3,931.36

Total Invoice Amount : **\$3,931.36**

Invoice Adjustment Amount:

Total Amount Due: **\$3,931.36**

Adjustment Reason:

Pay By: ACH(Online) Check Wire

- You will now be prompted to select your Payment Type.
- After selecting Submit, you will be taken to a Payment Confirmation page. This can be printed for your records, plus it is saved under the Contribution Payments tab of the website.

Enter a New Form - Pay Invoice(s)

Payment Confirmation

Payment Number:	PN17-00000009	Payment Type:	CHECK
Transaction Date:	9/12/2017 3:57:00 PM		
Total Invoice Amount:	\$1,942.16	Amount Due:	\$1,942.16
Mail Check To:	Steamfitters Local 464 Box # 30032 Omaha, NE 68103-1132		
Invoice #:	CW17-00000034		

- If you select to 'Pay By' Check, after you choose submit you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check.

ACH Payment



Steamfitters Local Union 464 Electronic Contributions

Friday, March 27, 2020

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Welcome Democontractor

Last Signed In: Friday, March 27, 2020

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ACH Payment

All employers must submit their Fringe Benefit Report and payment no later than the 15th day of the month following the calendar month in which the hours were worked. Liquidation damages of 10% plus interest will be imposed if payment is not received by the 3rd business day after the due date.

Total Amount Due: **\$4,487.76**

Bank Account Number: (Last 4 digits) 3473

Routing Number: (Last 4 digits) 6791

Bank Name: DFCU FINANCIAL

Account Type: Checking

Settlement Date: 3/31/2020

[Edit Account](#) [Submit](#) [Cancel](#)

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

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- If you select to 'Pay By' ACH (online) you will click Submit and be taken to the next step.
 - First time users will be prompted to enter the Bank Account Number, Bank Routing Number, Bank Name, and Account Type.
 - For future contributions, this information will be saved and will only need to be entered if there are updates to the Bank Account information.

ACH Payment

- After selecting Submit, you will be taken to an Important Message from webpage.
 - This Message gives the Trust Fund Office the authority to debit the bank account provided for the payment which was made.
 - Clicking OK will authorize the payment and take you to the next step. Clicking Cancel will take you back to the previous step.
 - Once you select OK to authorize the payment, you will be taken to the Payment Confirmation page. This can be printed for your records but will always be saved under the Contribution Payments tab of the website.

Modify A Saved Contribution Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:

Process Contribution:

***Batch Number:**

- **Modify/Submit Saved Contribution** – This option allows you to open up a saved Contribution Form and continue where you left off. Contribution Forms are only saved for 30 days. Once you submit a Contribution Form, it is saved permanently, but prior to that, you have 30 days to complete the form.

Modify A Saved Contribution Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	<input type="text"/>
Process Contribution:	Modify / Submit Saved Contribution <input type="text"/>
*Batch Number:	Batch Number CBA Work StartDate Work EndDate <input type="text"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

1. Select a saved batch form from the 'Batch Number' drop down list. If you want to select a saved batch and change the collective bargaining agreement use the second Batch number option. *See red box above.
2. Press the Submit button.
3. The rest of the process is exactly like entering a New Contribution Form.

Upload a Contribution File

Select Contractor:	<input type="text"/>		
Work Start Date:	<input type="text" value="5/1/2017"/>	Work End Date:	<input type="text" value="5/31/2017"/>
Process Contribution:	<input type="text" value="Upload Contribution File"/>		
Contribution Type:	<input type="text" value="Regular Contribution"/>		
CBA:	<input type="text" value="Building Trades"/>		
*File Name:	<input type="text"/>	<input type="button" value="Browse..."/>	
	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>	

- **Upload Contribution File** – This option allows data to be uploaded directly into the system from a data file in CSV or TXT format. These files can normally be extracted from the Company’s payroll system, this is very helpful when there are a large number of employees for whom fringe contributions are being reported.
- Select the **Work Start** and **Work End** dates. 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 Ending dates.
- Select the proper CBA, this will pull in the appropriate fringe rates
- Use the Browse Button to find the CSV or TXT file that 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 format that files need to be in to work with the upload process, the columns must be this exact order or you will get an error and not be able to upload the information. The Heading line (row 1; SSN, Workclass, First, etc.) cannot be in the file you try to upload, it would cause errors when uploading, the 1st row should contain 1st Employees info.

SSN	Work Class	Last Name	First Name	Middle Name	Gross Wages	Monthly (Flat Rate)	Regular Hours	Overtime	Double
123456789	Journeyman	Test	Data	A	400	8.5	40	20	10

- If data is incorrect you will get an error and the file will not be uploaded, you need to correct the file and make sure it is in the format mentioned on the prior page, and then try Uploading the file again.
- Once the .CSV or .TXT file has been successfully uploaded, you can proceed. The rest of the process is exactly like entering a New Contribution Form (refer to instructions above).

Copy/Modify Previous Report Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	<input type="text"/>		
Work Start Date:	<input type="text" value="4/1/2017"/>	Work End Date:	<input type="text" value="4/30/2017"/>
Process Contribution:	<input type="text" value="Copy / Modify Previous Report Form"/>		
*Invoice Number:	Invoice Number CBA Work StartDate Work EndDate		
	<input type="text" value="CW17-00000027"/>		
<input type="checkbox"/> Check here to zero out hours and amounts from copied data			
<input type="button" value="Submit"/>		<input type="button" value="Cancel"/>	

- **Copy/Modify Previous Report Form** – option allows electronic Contribution Data previously input into the system to be pulled forward and re-used for the current month. It brings in the same Employees SSN and Name info based on the selected CBA, which makes it very beneficial when Contractor reports on the same employees every payperiod.
- Select the **New Work Start** 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 Ending dates.
- Select Copy/Modify Previous Report Form from the drop down box titled **Process Contribution**.
- From the **Invoice Number** drop down list, select the Invoice you would like to copy.
- Check the appropriate box to **zero out any information** from the copied data, this will zero hours & wages
- Press the **Submit** button.
- The rest of the process is exactly like entering a New Contribution Form (refer to instructions above).

How to View Past Contribution Forms



[View All Contributions](#)

Select Contractor:
Begin Date: End Date:

- Select the Contractor Name from the drop down list. (Some contractors can have multiple contractor numbers to choose from based upon how your user ID is setup.)
- Press the Search button, and it will show a screen with all Past Contributions Forms for this Contractor

How to View Past Contribution Forms

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
CW17-00000034	08/31/2017	01_OS	ALL FUNDS	1	OS0368		\$1,942.16	Pending	CHK		DemoContractor	09/12/2017	<input type="checkbox"/>
CW17-00000033	08/31/2017	01_OS	ALL FUNDS	7	OS0368		\$0.00	Pending			DemoContractor	09/11/2017	<input type="checkbox"/>
CW17-00000032	08/31/2017	01_OS	ALL FUNDS	7	OS0368		\$3,550.40	Pending	WIRE		DemoContractor	09/11/2017	<input type="checkbox"/>
CW17-00000031	08/31/2017	01_OS	ALL FUNDS	7	OS0368		\$7,100.80	Pending	CHK		DemoContractor	09/07/2017	<input type="checkbox"/>
CW17-00000030	08/31/2017	01_OS	ALL FUNDS	7	OS0368		\$7,100.80	Pending	CHK		DemoContractor	09/07/2017	<input type="checkbox"/>
CW17-00000024	07/31/2017	01_OS	ALL FUNDS	7	OS0368		\$1,553.30	Pending	WIRE		DemoContractor	08/29/2017	<input type="checkbox"/>

- If you wish to Delete Invoices, you can only Deleted Invoices in “Pending” status, you need to click the box in the “Del” column to selected desired Invoices to be deleted, then press Delete Contribution button at the bottom of the page.
- To delete invoices that are in an “In Process” status, you need to contact the Fund Office.
- If status says “Paid,” your form and payment was received and entered into the Contribution System, these cannot be deleted.

How to Make Payments on Multiple Saved Forms

Pending Payment

Select Contractor:	<input type="text"/>	Invoice Number:	<input type="text"/>
* Invoice Begin Date:	<input type="text" value="5/8/2017"/>	* Invoice End Date:	<input type="text" value="6/8/2017"/>
<input type="button" value="Search"/>		<input type="button" value="Clear"/>	

All employers must submit their Fringe Benefit Report and payment no later than the 15th day of the month following the calendar month in which the hours were worked. Liquidation damages of 10% plus interest will be imposed if payment is not received by the 3rd business day after the due date.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input type="checkbox"/>	CW17-00000010	05/31/2017	219BT		06600	\$695.55	DemoContractor	06/08/2017
<input type="checkbox"/>	CW17-00000008	05/31/2017	219BT		06600	\$9,565.80	DemoContractor	06/07/2017
<input type="checkbox"/>	CW17-00000005	04/30/2017	219BT		06600	\$3,683.90	DemoContractor	05/22/2017

- If you enter and save multiple invoices and have not processed a payment for them, you can process one payment for multiple invoices, whether by Wire or Check
- From the Contribution Payment dropdown menu choose Make a Payment

How to Make Payments on Multiple Saved Forms

All employers must submit their Fringe Benefit Report and payment no later than the 15th day of the month following the calendar month in which the hours were worked. Liquidation damages of 10% plus interest will be imposed if payment is not received by the 3rd business day after the due date.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW17-00000010	05/31/2017	219BT	Building Trades	06600	\$695.55	DemoContractor	06/08/2017
<input type="checkbox"/>	CW17-00000008	05/31/2017	219BT	Building Trades	06600	\$9,565.80	DemoContractor	06/07/2017
<input type="checkbox"/>	CW17-00000005	04/30/2017	219BT	Building Trades	06600	\$3,683.90	DemoContractor	05/22/2017

- You will go to a Pending Payment screen which shows contribution forms that have not been finalized for payment.
- In the Select Contractor area you can enter “Invoice Begin” / “Invoice End Date” date range to narrow or widen your search for all unpaid contributions forms.
- Click on the Box all the way to the left of the Invoice # for the forms that you would like to pay. This will combine all forms into one payment amount and you can continue to make your payment through the normal payment process.



Questions/Concerns

Please call us at (855) 725-3551 and ask to speak with Sara Nelson.