

Plumbers and Pipefitters Local #94 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.plumbers94employers.org



Plumbers and Pipefitters Local 94 Electronic Contributions

Login	
	Monday, October 09, 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, and someone will assist you.

Lets Get Started

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Electronic Contribution

Select the contractor from the dropdown menu.

Select Contractor: [Dropdown]

Work Start Date: 9/1/2017 [Dropdown] **Work End Date:** 9/30/2017 [Dropdown]

Process Contribution: Enter New Contribution [Dropdown]

Contribution Type: Regular Contribution [Dropdown]

CBA: L 94 LIGHT COMMERICAL : [Dropdown]

☐ Report no Hours

- 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 allows Manual Data 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 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 previous months submitted Contribution Form and copy the information for the current months Contribution Form

Entering a New Form

Select Contractor:		
Work Start Date:	9/1/2017	Work End Date: 9/30/2017
Process Contribution:	Enter New Contribution	
Contribution Type:	Regular Contribution	
CBA:	L 94 LIGHT COMMERCIAL :	☐ Report no Hours
Submit Cancel		

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:		Contractor ID:	120036
Batch Number:	CW17-00000014	Work End Date:	09/30/2017
CBA:	94-114 - L 94 LIGHT COMMERCIAL 1/14		

[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	Dues	Regular Hours	Overtime	Double	Delete?
1		COLLECTION ▼				0.00	0.00	0.00	0.00	☐
2		COLLECTION ▼				0.00	0.00	0.00	0.00	☐

- 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 save 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: Contractor ID: 120036
Batch Number: CW17-00000014 Work End Date: 09/30/2017
CBA: 94-114 - L 94 LIGHT COMMERCIAL 1/14

Contractor Contribution Details:

Work Class	Contractor	Dues	Regular Hours	Overtime	Double	Amount	
DEFAULT		5.54	121.00	42.00	12.00	\$1,333.50	View Details
TOTAL		5.54	121.00	42.00	12.00	\$1,333.50	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Dues	Regular Hours	Overtime	Double	Amount	
123456789		Data	A	Test	5.54	121.00	42.00	12.00	\$1,333.50	View Details
TOTAL					5.54	121.00	42.00	12.00	\$1,333.50	

- 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
 - See next page for option to not pay certain fringes on all employees
 - 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 - Finalize Contributions

Contribution Batch	
Contractor Name:	
Batch Number:	CW17-00000014
CBA:	94-114 - L 94 LIGHT COMMERCIAL 1/14
Contractor ID:	120036
Work End Date:	09/30/2017

INVOICE # CW17-00000011

Your Calculated Contributions for work ending 09/30/2017: **\$1,333.50**

Remittance Amount Due: **\$1,333.50**

Invoice #: **CW17-00000011**
*** 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**

Invoice Date: **10/09/2017**

Amount Due:

Work Class	Fund	Fund Code	Dues	Regular Hours	Overtime	Double	Calc Hrs	Basis	Rate	Amount
DEFAULT	Health & Welfare	H&W	5.54	121.00	42.00	12.00	175.00	Hours Worked	5.5400	\$969.50
DEFAULT	Retirement Fund	Annui	5.54	121.00	42.00	12.00	175.00	Hours Worked	1.8300	\$320.25
DEFAULT	Training Fund 1	Trn1	5.54	121.00	42.00	12.00	175.00	Hours Worked	0.2500	\$43.75
TOTAL										\$1,333.50

Employee Details:

Name	Work Class	Dues	Reg	OT	DT	Annui	H&W	Trn1
Test, Data A		5.54	121.00	42.00	12.00	\$320.25	\$969.50	\$43.75
TOTAL		5.54	121.00	42.00	12.00	\$969.50	\$320.25	\$43.75

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

Enter a New Form - Pay Invoice(s)

Pending Payment

Select Contractor: Invoice Number:

* Invoice Begin Date: * Invoice End Date:

Due by the 15th of the month following work month. Considered late if not paid by the 16th day of the same month. Liquidated Damages are assessed at: 10% of total contribution due if not paid by the 15th of the month following the work month.

Pending Invoice:

☒	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
☒	CW17-00000011	09/30/2017	94-114	L 94 LIGHT COMMERICAL 1/14	120036	\$1,333.50	DemoContractor	10/09/2017

- After selecting Pay Now you go to the Pending Payments page. Press the “Search” button to display any pending invoices. Please pay for Pension and Healthcare invoices separately. 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(s) 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: \$1,333.50

Select Contractor:
*** Invoice Begin Date:**
*** Invoice End Date:**

Due by the 15th of the month following work month. Considered late if not paid by the 16th day of the same month. Liquidated Damages are assessed at: 10% of total contribution due if not paid by the 15th of the month following the work month.

Pending Invoice:

☒	<u>Invoice #</u>	<u>Wrk Date</u>	<u>Section Code</u>	<u>Section</u>	<u>Cont No.</u>	<u>Amount</u>	<u>Submitted By</u>	<u>Trans. Date</u>
☒	CW17-00000011	09/30/2017	94-114	L 94 LIGHT COMMERCIAL 1/14	120036	\$1,333.50	DemoContractor	10/09/2017

- This will show selected invoice(s) highlighted orange on screen and in upper left portion of screen under Pending Payment a “Payment Summary” section 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) and you can change your selections.

Enter a New Form - Pay Invoice(s)

Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW17-00000045	09/30/2017	Building Trades	03035	\$1,469.94
TOTAL				\$1,469.94

Total Invoice Amount : **\$1,469.94**

Invoice Adjustment Amount:

Total Amount Due: **\$1,469.94**

Adjustment Reason:

Pay By: ☒ ACH(Online) ☐ Check

- Make Payment takes you to screen showing Invoice(s) selected and total amount due.
- Now select your Payment Type
 - If you select to 'Pay By' ACH (Online) you will click submit and be taken to the next step.
 - First time ACH payments will be prompted to enter needed info

Enter a New Form - Pay Invoice(s)

Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW17-00000011	09/30/2017	L 94 LIGHT COMMERCIAL 1/14	120036	\$1,333.50
TOTAL				\$1,333.50

Total Invoice Amount : **\$1,333.50**

Invoice Adjustment Amount:

Total Amount Due: **\$1,333.50**

Adjustment Reason:

Pay By: ☒ ACH(Online) ☐ Check

- If you have ACH BLOCK or Filtering on the bank account you are using to pay your invoice you need to contact your bank and provide them with the Company ID from this screen. If you do not your payment will not go through.
 - The company ID for payments is 272373591

- If this is your first time setting up ACH you will be required to fill out a form and provide your bank account number, bank routing number and account type. For future contributions, info is saved and only needs to be updated if changed. If your company requires an Approver be notified when an ACH payment is process you can add in a list of people.
- Input a settlement date for when you would like the funds withdrawn from your account, there is a 2 working day lag for ACH transaction to hit the Fringe fund bank account, so you must submit your payment 2 days prior to when you want it to be considered paid.
- 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.
- 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

Modify A Saved Contribution Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	
Process Contribution:	Modify / Submit Saved Contribution v
*Batch Number:	Batch Number CBA Work StartDate Work EndDate v
Cancel	

- **Modify/Submit Saved Contribution** – 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:	
Process Contribution:	Modify / Submit Saved Contribution v
*Batch Number:	Batch Number CBA Work StartDate Work EndDate
Submit 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 (refer to instructions above)

Upload a Contribution File

Select Contractor:			
Work Start Date:	5/1/2017	Work End Date:	5/31/2017
Process Contribution:	Upload Contribution File		
Contribution Type:	Regular Contribution		
CBA:	Building Trades		
*File Name:			Browse...
Submit Cancel			

- **Upload Contribution File** – option allows Employee Hours & Wages 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	Dues	Regular Hours	Overtime	Double
123456789	Regular	Test	Data	M	5.54	127	42	12

- 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:			
Work Start Date:	4/1/2017	Work End Date:	4/30/2017
Process Contribution:	Copy / Modify Previous Report Form		
*Invoice Number:	Invoice Number CBA Work StartDate Work EndDate CW17-00000027		
☐ Check here to zero out hours and amounts from copied data			
Submit		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 pay period.
- 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

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View All Contributions

Select Contractor: Begin Date: 4/30/2017 End Date: 5/30/2017

- 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
CW17-00000011	09/30/2017	94-114	L 94 LIGHT COMMERICAL 1/14	1	120036		\$1,333.50	Pending			DemoContractor	10/09/2017	☐
CW17-00000005	08/31/2017	94-114	L 94 LIGHT COMMERICAL 1/14	1	120036		\$0.00	Pending			DemoContractor	09/22/2017	☐

- 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

View All Payment

* Select Contractor:		Payment #:	
* Payment Begin Date:	9/9/2017	* Payment End Date:	10/9/2017
* Payment Type:	All		
		Search	Clear

Payment:

<u>Payment #</u>	<u>Cont No</u>	<u>Type</u>	<u>Amount</u>	<u>Transaction Date</u>	<u>Settlement Date</u>	<u>Submitted By</u>
PN17-00000002	12071	ACH	\$2,541.40	09/28/2017	10/02/2017	DemoContractor
PN17-00000001	12350	ACH	\$249.29	08/23/2017	08/25/2017	DemoContractor

- 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 ACH or Check
- From the Contribution Payment dropdown menu choose Make a Payment

How to Make Payments on Multiple Saved Forms

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Make a Payment

View All Payment

Account Management

Make Variance Payment

Select Contractor:

1

* Invoice Begin Date:

9/10/2017

* Invoice End Date:

10/10/2017

Search

Clear

Due by the 15th of the month following work month. Considered late if not paid by the 16th day of the same month. Liquidated Damages are assessed at: 10% of total contribution due if not paid by the 15th of the month following the work month.

Pending Invoice:

Select Invoice

Cancel

	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
☐	CW17-00000011	09/30/2017	94-114	L 94 LIGHT COMMERCIAL 1/14	120036	\$1,333.50	DemoContractor	10/09/2017

Select Invoice

Cancel

- 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

For Training and Enrollment, please call us at (330) 779-8856, and ask to speak with someone from our Contributions Team.