

S.M.A.R.T. Local 137

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 and Checks
- 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.smart137employers.org

SHEET METAL | AIR | RAIL | TRANSPORTATION
SMART S.M.A.R.T. Local 137

Thursday, October 26, 2023

* User Name:
* Password:

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

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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.

- **To log in to this site, you will need to contact the Fund 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 (718) 937-4514 for assistance.**

Processing Contributions

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: DEMO | DEMO EMPLOYER ▾

Work Start Date: 9/1/2023 ▾

Process Contribution: Enter New Contribution ▾

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

CBA:

Report no Hours
Please also make sure to log into One Stop to 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

Entering a New Form

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: DEMO | DEMO EMPLOYER ▾

Work Start Date: 9/1/2023 ▾ Work End Date: 9/30/2023 ▾

Process Contribution: Enter New Contribution ▾

Contribution Type: Regular Contribution ▾

CBA: Sign (GNYS) ▾

Report no Hours
Please also make sure to log into One Stop to report no hours

Submit Cancel

1. Select the **Contractor**: If you only submit contributions for one contractor, that contractor will show by default and no other options will be available for selection. If you have a login that allows you to submit contributions for multiple contractors, click the drop-down arrow and a list of contractors will become available.
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

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Contribution Entry Form

Contribution Batch

Contractor Name:	DEMO EMPLOYER	Contractor Number:	DEMO
Batch Number:	CW23-00000012	Work End Date:	09/30/2023
CBA:	N00201371401 - Sign (GNYS)		

[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	Flat Rate	Gross Wages	Straight Time	Overtime	Double Time	Vacation	Delete?
1	999889999	NEW YORK JOURNEYMAN	William	Q	Testington	0.00	5000	100	30	20	10	<input type="checkbox"/>
2	888998888	NEW YORK JOURNEYMAN	Susan	P	Testington	0.00	5000	120	15	0	0	<input type="checkbox"/>
3		NEW YORK JOURNEYMAN				0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

- This screen will typically be pre-populated 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, Work Class, and full name in the form.
 - To delete an employee, check the delete box on that employee's line and click Delete Employee.
- Enter the Flat Rate, Gross Wages, Straight Time, Overtime, Double Time, and Vacation amounts in the appropriate fields where applicable (dependent on your CBA and reporting requirements) for each employee.
- Click Save and Complete Later if you need to revisit later to finish your contribution entry. This will save what you have already input and allows you to pick up exactly where you left off.
- Once all employees' hours and wages are entered, click on Calculate Contribution.

Enter a New Form – Calculate Contributions

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Process Contribution

Contribution Batch

Contractor Name:	DEMO EMPLOYER	Contractor Number:	DEMO
Batch Number:	CW23-00000012	Work End Date:	09/30/2023
CBA:	N00201371401 - Sign (GNYS)		

Contractor Contribution Details:

Work Class	Contractor	Flat Rate	Gross Wages	Straight Time	Overtime	Double Time	Vacation	Amount	
New York Journeyman	DEMO EMPLOYER	0.00	10,000.00	220.00	45.00	20.00	10.00	\$16,159.50	View Details
TOTAL		0.00	10,000.00	220.00	45.00	20.00	10.00	\$16,159.50	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Flat Rate	Gross Wages	Straight Time	Overtime	Double Time	Vacation	Amount	
888998888	New York Journeyman	Susan	P	Testington	0.00	5,000.00	120.00	15.00	0.00	0.00	\$7,654.50	View Details
999889999	New York Journeyman	William	Q	Testington	0.00	5,000.00	100.00	30.00	20.00	10.00	\$8,505.00	View Details
TOTAL					0.00	\$10,000.00	220.00	45.00	20.00	10.00	\$16,159.50	

- The [View Details](#) link under Contractor Contribution Details will show you a breakdown of all calculated fringes for the entire period.
- The [View Details](#) link under Employee Contribution Details will show you a breakdown of all calculated fringes for a particular employee.
- Use the [Back](#) button at the bottom of the page to return to the prior screen if you'd like to adjust work details for any employee.
 - **IMPORTANT WARNING: *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.**
- Upon entering and verifying the information is correct, click the [Finalize Contribution](#) button.
 - **Note:** Be sure to verify before you proceed. Once you've clicked [Finalize Contribution](#), you **cannot go back** and make changes.

Enter a New Form - Finalize Contributions

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us
Contribution Batch					
Contractor Name:	DEMO EMPLOYER	Contractor Number:	DEMO		
Batch Number:	CW23-00000012	Work End Date:	09/30/2023		
CBA:	N00201371401 - Sign (GNYS)				
INVOICE # CW23-00000012					
Your Calculated Contributions for work ending 09/30/2023:	\$16,159.50				
Remittance Amount Due:	\$16,159.50				
Mail Check To:					
For Funds:	AP, AS, DC, HW, PAL, SC				
Amount Due:	\$11,052.30				
Address:	50-02 5th Street, Suite A Long Island City, NY 11101 USA				
For Funds:	DB, ISC, ITR, SM				
Amount Due:	\$5,107.20				
Address:	SMW National Benefit Funds PO Box 79321 Baltimore, MD 21279 USA				
Invoice #:	CW23-00000012				
	* 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:	10/26/2023				
	<input type="button" value="Pay Now"/>	<input type="button" value="Print Invoice"/>	<input type="button" value="Done"/>		

- 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
- **IMPORTANT NOTE!** The website will calculate and separate out **TWO** totals:
 - Annuity, Apprentice Training, Assessment (Working Dues), Health & Welfare, Local 137 Scholarship, PAL, and 401K dues are remitted to the Local 137 Fund Office.
 - Pension, International Training, International Scholarship and SMOHIT are remitted to SMW National Benefit Funds.

Enter a New Form - Pay Invoice(s)

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

Pending Payment

Select Contractor: DEMO | DEMO EMPLOYER ▾ Invoice Number:

* Invoice Begin Date: 9/26/2023 ▾ * Invoice End Date: 10/26/2023 ▾

Employers under the standard CBA submit contributions (summary sheets, forms and payments) monthly. Employers covered under "Short Form Agreements" (SFA's) submit contributions weekly. In accordance with the International Association of Sheet Metal, Air, Rail and Transportation Workers Local Union 137 Benefit Funds policies and procedures, fringe benefit contributions and remittance reports are due by the tenth (10th) day of the month following the month in which the work was performed. If an employer fails to make the required contributions until after the twentieth (20th) of the month in which the contributions are due, the contributions shall become delinquent and subject to interest of ten percent (10%) per year of the total amount due, calculated daily.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW23-0000013	09/30/2023	N00201371401	Sign (GNYS)	DEMO	\$16,159.50	DemoContractor	10/26/2023
<input type="checkbox"/>	CW23-0000012	09/30/2023	N00201371401	Sign (GNYS)	DEMO	\$16,159.50	DemoContractor	10/26/2023
<input type="checkbox"/>	CW23-0000011	09/30/2023	N00201371401	Sign (GNYS)	DEMO	\$16,417.50	DemoContractor	10/26/2023

- 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. 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: **\$16,159.50**

Make Payment Edit Selection

Select Contractor: DEMO | DEMO EMPLOYER ▾ Invoice Number:

* Invoice Begin Date: 9/26/2023 ▾ * Invoice End Date: 10/26/2023 ▾

Search Clear

Employers under the standard CBA submit contributions (summary sheets, forms and payments) monthly. Employers covered under "Short Form Agreements" (SFA's) submit contributions weekly. In accordance with the International Association of Sheet Metal, Air, Rail and Transportation Workers Local Union 137 Benefit Funds policies and procedures, fringe benefit contributions and remittance reports are due by the tenth (10th) day of the month following the month in which the work was performed. If an employer fails to make the required contributions until after the twentieth (20th) of the month in which the contributions are due, the contributions shall become delinquent and subject to interest of ten percent (10%) per year of the total amount due, calculated daily.

Pending Invoice:

Select Invoice Cancel

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW23-00000013	09/30/2023	N00201371401	Sign (GNYS)	DEMO	\$16,159.50	DemoContractor	10/26/2023
<input type="checkbox"/>	CW23-00000012	09/30/2023	N00201371401	Sign (GNYS)	DEMO	\$16,159.50	DemoContractor	10/26/2023
<input type="checkbox"/>	CW23-00000011	09/30/2023	N00201371401	Sign (GNYS)	DEMO	\$16,417.50	DemoContractor	10/26/2023

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)

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Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW23-0000019	09/30/2023	Sign (GNYS)	DEMO	\$16,159.50
TOTAL				\$16,159.50

If you select the **ACH** payment option below, ACH payment in the amount of **\$11,052.30** will be withdrawn from your bank account and sent to Local 137. Please log in to **OneStop** to make payment for the remaining **\$5,107.20** to the IA.

If you select the **Check** payment option below, please send 1 check to Local 137 for **\$11,052.30** and another check to the IA for **\$5,107.20**.

(Note: If the IA amount displayed is \$0.00, no amount needs to be remitted to IA).

Total Invoice Amount : **\$16,159.50**
Total Amount Due: **\$16,159.50**

Pay By: ACH(Online) Check

- The table at the top of the screen will display the invoice(s) you've selected and the grand totals due.
- Note that **2 totals** are displayed in a **red** colored description below the invoice table. These are split between the amounts due to Local 137 and the IA (SMW National Benefits Funds).
 - If you pay by **ACH**, the amount due to Local 137 will be remitted via ACH, and you will need to login to **OneStop** to remit the remaining amount due to the IA.
 - If you pay by **check**, you will need to send **2 checks**: 1 check to the Local 137 Fund Office and another check to the IA (mailing addresses will be provided on the confirmation page).
- Choose whether you would like to submit your payment via ACH (Online) or Check and then click the Submit button.

Enter a New Form - Pay by ACH

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Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW23-00000019	09/30/2023	Sign (GNYS)	DEMO	\$16,159.50
TOTAL				\$16,159.50

If you select the **ACH** payment option below, ACH payment in the amount of **\$11,052.30** will be withdrawn from your bank account and sent to Local 137. Please log in to **OneStop** to make payment for the remaining **\$5,107.20** to the IA.

If you select the **Check** payment option below, please send 1 check to Local 137 for **\$11,052.30** and another check to the IA for **\$5,107.20**.

(Note: If the IA amount displayed is \$0.00, no amount needs to be remitted to IA).

Total Invoice Amount : \$16,159.50
Total Amount Due: \$16,159.50

Pay By: ACH(Online) Check

- If you select ACH (Online) and click submit, you will be taken to the ACH Payment screen (see next page).
- **Note:** 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: [REDACTED] INC

* Routing Number:

* Bank Account Number:

* Account Type: Checking Saving

Bank Name:



Get New Image

* Please enter the characters as shown in the image.

Enter a New Form - Pay by ACH

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ACH Payment

Employers under the standard CBA submit contributions (summary sheets, forms and payments) monthly. Employers covered under "Short Form Agreements" (SFA's) submit contributions weekly. In accordance with the International Association of Sheet Metal, Air, Rail and Transportation Workers Local Union 137 Benefit Funds policies and procedures, fringe benefit contributions and remittance reports are due by the tenth (10th) day of the month following the month in which the work was performed. If an employer fails to make the required contributions until after the twentieth (20th) of the month in which the contributions are due, the contributions shall be become delinquent and subject to interest of ten percent (10%) per year of the total amount due, calculated daily.

Total Amount Due: \$11,052.30

Bank Account Number: (Last 4 digits) [REDACTED]

Routing Number: (Last 4 digits) [REDACTED]

Bank Name: [REDACTED]

Account Type: Checking

Settlement Date: 10/30/2023

Note: After clicking the Submit button below, please be sure to log in to **OneStop** to make payment to the IA for the remaining **\$5,107.20** (note, if the OneStop amount displayed is \$0.00, no amount needs to be remitted to IA).

**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.**
 - **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 posted as "paid."**
 - **If you have an ACH block on your bank account, please make sure that you provide your bank the appropriate details 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, and the information will also be saved under the Contribution Payments tab of the website.**
- **IMPORTANT NOTE:** If you reach the Payment Confirmation page, you have successfully sent an ACH payment for the amount due to Local 137. However, you still need to **login to OneStop** to remit the remainder due to the IA.

Enter a New Form - Pay by Check

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Payment Confirmation

Payment Number:	PN23-00000013	Payment Type:	ACH (Online)
Transaction Date:	10/26/2023 5:03:00 PM	Settlement Date:	10/30/2023
Total Invoice Amount:	\$16,159.50	Amount Paid:	\$11,052.30
Invoice #:	CW23-00000019		

If you selected ACH payment, please be sure to login to OneStop to make payment for the remaining \$5,107.20 to the IA.

If you selected Check payment, please send 1 check to Local 137 for \$11,052.30: 50-02 5th Street, Suite A Long Island City, NY 11101 USA. Then send another check to the IA for \$5,107.20: SMW National Benefit Funds PO Box 79321 Baltimore, MD 21279 USA.

(Note: If the IA amount displayed is \$0.00, no amount needs to be remitted to IA).

- If you select to pay by check, after you click Submit on the Make Payment screen, you will be taken directly to the Payment Confirmation page. You will need to print and mail this Payment Confirmation with your 2 checks.
- **IMPORTANT NOTE:** Please take careful note of the instructions for mailing **2 checks** – each to different addresses.
 - If the amount due to the IA shows as “\$0.00,” you only need to mail 1 check to Local 137.

Modify A Saved Contribution Form

The screenshot shows the 'Electronic Contribution' page with a navigation bar at the top containing 'Home', 'Electronic Contribution', 'Contribution Payment', 'Employer Information', 'News', and 'Contact Us'. Below the navigation bar, the page title is 'Electronic Contribution'. The main content area contains the instruction 'Select the contractor from the list to submit your contributions'. A form box contains the following elements: 'Select Contractor:' with a dropdown menu showing 'INC'; 'Process Contribution:' with a dropdown menu open, listing 'Enter New Contribution', 'Modify / Submit Saved Contribution' (highlighted in blue), 'Upload Contribution File', and 'Copy / Modify Previous Report Form'; and '*Batch Number:' with a dropdown menu. At the bottom of the form box are 'Submit' and 'Cancel' buttons.

- 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: [REDACTED] INC

Process Contribution: Modify / Submit Saved Contribution

*Batch Number: 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 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

Home Electronic Contribution Contribution Payment Employer Information News Contact Us

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: [Redacted] INC

Work Start Date: [Redacted]

Work End Date: 8/31/2020

Process Contribution: **Upload Contribution File**

Contribution Type: Regular Contribution

CBA: BTE AGREEMENTS

*File Name: [Redacted] Browse...

Submit Cancel

- 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 Choose File 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.

See below for the file format that must be used for uploading contributions. The columns must be in this exact order or an error will occur and the upload will fail. A header line should not be used in your file (i.e. employee contribution information should begin in row #1), or it will also cause errors when uploading.

SSN	Job Class Code	Last Name	First Name	Middle Name or Initial	Flat Rate	Gross Wages	Straight Time	Overtime	Double Time	Vacation
999889999	J	Testington	William	T	0	6000	100	20	10	5
888998888	A8	Testington	Susan	Q	0	5000	100	15	0	0

Job Class Codes

When uploading a contributions file, please be sure to only select job classes that are associated with the Collective Bargaining Agreement (CBA) you are submitting contributions under. If a job class is used that is not associated with your CBA, you may receive unexpected results. A list of the Fund's job classes are provided below.

J	Journeyman
F	Foreman
A1	1st Period Apprentice
A2	2nd Period Apprentice
A3	3rd Period Apprentice
A4	4th Period Apprentice
A5	5th Period Apprentice
A6	6th Period Apprentice
A7	7th Period Apprentice
A8	8th Period Apprentice
A9	9th Period Apprentice
A10	10th Period Apprentice
P36	36% Production Worker
P42	42% Production Worker
P50	50% Production Worker
ALL	All Classes
EO	Elected Official
NH	New Hire 0-30 Days
PRB	Production Worker 31-90 Days
PRD	Production Worker hired after 02/2018
1YR	6-12 month Awning Apprentice
2YR	13-24 month Awning Apprentice
3YR	25-36 month Awning Apprentice
4YR	37-48 month Awning Apprentice

5YR	49-60 month Awning Apprentice
O	Owner Member
A/A	Receptionist / Administrative Assistant - 3rd Year
A/A 1	Receptionist - UOSR
ADM	Fund Administrator - UOSJ
DAT	Data Entry - UOSA
OFP	Bookkeeper - UOS
BPR	Bill Poster
PTI	Part Time Instructor
OM	Owner Member
TR1	Trainee 0-12 Month
TR2	Trainee 13-24 Month
TR3	Trainee 25-30 Month
TR4	Trainee 31-36 Month
4011	\$1 per hour 401K contribution
40110	\$10 per hour 401K contribution
40115	\$15 per hour 401K contribution
4012	\$2 per hour 401K contribution
40120	\$20 per hour 401K contribution
4013	\$3 per hour 401K contribution
40135	\$3.50 per hour 401K contribution
4014	\$4 per hour 401K contribution
40145	\$4.50 per hour 401K Contribution
4015	\$5 per hour 401K contribution

Upload a Contribution File

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Contribution Entry Form

Contribution Batch

Contractor Name:	DEMO EMPLOYER	Contractor Number:	DEMO
Batch Number:	CW23-00000012	Work End Date:	09/30/2023
CBA:	N00201371401 - Sign (GNYSYA)		

[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	Flat Rate	Gross Wages	Straight Time	Overtime	Double Time	Vacation	Delete?
1	999889999	NEW YORK JOURNEYMAN	William	Q	Testington	0.00	5000	100	30	20	10	<input type="checkbox"/>
2	888998888	NEW YORK JOURNEYMAN	Susan	P	Testington	0.00	5000	120	15	0	0	<input type="checkbox"/>
3		NEW YORK JOURNEYMAN				0.00	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 the 'Electronic Contribution' page in the BeneSys system. The page has a navigation bar with links for Home, Electronic Contribution, 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 'INC' selected. The dropdown list is open, showing options: 'Enter New Contribution', 'Modify / Submit Saved Contribution', 'Upload Contribution File', and 'Copy / Modify Previous Report Form' (highlighted in blue).
- Work Start Date:** A date input field.
- Work End Date:** A date input field with '8/31/2020' selected.
- Process Contribution:** A section containing:
 - *Invoice Number:** A dropdown menu with 'CW20-0000009' selected. Above it is a header: 'Invoice Number | CBA | Work StartDate | Work EndDate'.
 - Check here to zero out hours and amounts from copied data** (highlighted with a red box).
 -

- 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 shows the 'Electronic Contribution' section of the BeneSys web application. The navigation menu includes 'Home', 'Electronic Contribution', 'Contribution Payment', 'Employer Information', 'News', and 'Contact Us'. Under 'Electronic Contribution', there are three links: 'Process Contribution', 'View All Contributions', and 'Frequently Asked Questions'. The 'View All Contributions' link is highlighted with a red rectangular box. Below the navigation menu, there is a text prompt: 'Select the contractor from the list to submit:'. The main form area contains several fields: 'Select Contractor:' with a dropdown menu showing 'INC'; 'Work Start Date:' with a date picker set to '9/1/2020'; 'Work End Date:' with a date picker set to '9/30/2020'; 'Process Contribution:' with a dropdown menu set to 'Enter New Contribution'; 'Contribution Type:' with a dropdown menu set to 'Regular Contribution'; and 'CBA:' with a dropdown menu set to 'BTE AGREEMENTS'. There is also an unchecked checkbox labeled 'Report no Hours' and two buttons: 'Submit' and 'Cancel'.

- 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
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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.

- 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

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
CW20-0000011	08/31/2020	00	BTE AGREEMENTS	2	[Redacted]	[Redacted] INC	\$6,513.60	Pending			DemoContractor	09/30/2020	<input type="checkbox"/>
CW20-0000010	08/31/2020	00	BTE AGREEMENTS	2	[Redacted]	[Redacted] INC	\$6,513.60	Pending			DemoContractor	09/30/2020	<input type="checkbox"/>
CW20-0000009	08/31/2020	00	BTE AGREEMENTS	2	[Redacted]	[Redacted] INC	\$6,513.60	Pending	ACH	10/02/2020	DemoContractor	09/30/2020	<input type="checkbox"/>

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.

How to Make Payments on Multiple Saved Forms

The screenshot displays the BeneSys web application 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 its dropdown menu is open, showing four options: Make a Payment (highlighted with a red box), View All Payment, Account Management, and Make Variance Payment. To the right of the dropdown menu, there is a News / Events section with a dark blue header and the text "No news/events are available". The main content area on the left contains an Introduction section with the following text:

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.

- **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: [Redacted] INC Invoice Number: []
 * Invoice Begin Date: 8/30/2020 * Invoice End Date: 9/30/2020
 [Search] [Clear]

In accordance with the Collection Procedures, contribution payments are due on the 20th day of the month immediately following the work month and are considered delinquent if not received by the same day. Pursuant to the Collection Procedures adopted by the Trustees, payments received past the due date are subject to liquidated damages of 10% of the unpaid contributions and interest on the unpaid contributions of 12% per annum. The first 'late' of the calendar year is forgiven as long as no other late reports are received. If you have ACH Block or Filtering on the bank account listed below, the Company ID for this transaction will be 2065308.

Pending Invoice: [Select Invoice] [Cancel]

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input type="checkbox"/>	CW20-00000011	08/31/2020	00	BTE AGREEMENTS	[Redacted]	\$6,513.60	DemoContractor	09/30/2020
<input type="checkbox"/>	CW20-00000010	08/31/2020	00	BTE AGREEMENTS	[Redacted]	\$6,513.60	DemoContractor	09/30/2020

[Select Invoice] [Cancel]

- 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 the Fund Office at (718) 937-4514.