Iron Workers' Local No. 25 Fringe Benefit Funds 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.

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Web Address:
www.iw25employerinfo.org

- **To log into this site, you will need a User Name 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.**

- **A second option is to call (248) 347-3100 or Toll Free (800) 572-8553, and someone will assist you.**

Lets Get Started

- **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

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Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor: 00123 | EMPLOYER NAME

Work Start Date: 11/1/2018   **Work End Date:** 11/30/2018

Process Contribution:

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

Contribution Type:

CBA: ☐ Report no Hours

All CBA:

Submit   Cancel

- **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 or .TXT format) directly to the website.**

- **Copy / Modify Previous Report Form** – **This option will allow you to retrieve a previous month's submitted contribution form and copy the information to the current month's contribution form.**

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Entering a New Form

1. **Select the <u>Contractor</u>: If you only submit contributions for one contractor, that contractor will show by default and you won't have other contractors to select from. If you have a login that allows you to submit contributions for multiple contractors, click the drop-down arrow and a list of contractors you submit for will show, from which you can select the desired contractor.**

2. **Select a <u>Work Start Date</u> and <u>Work End Date</u>. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and ending dates.**

3. **Select <u>Enter New Contribution</u>.**

4. **The contribution type should always be <u>Regular Contribution</u>.**

5. **Select the appropriate <u>CBA</u> based on the work you are reporting for. This will pull the related fringe rates.**

6. **Finally, click <u>Submit</u> to begin entry.**

Enter a New Form - Contribution Entry

- **This screen allows you to enter and verify the information for each employee. Employee information will automatically populate once you have entered a Social Security Number and have tabbed into the next field. New employees' information will need to be manually entered into each field.**
- **Enter the <u>Gross</u> amounts, <u>Straight Time</u> amounts, <u>Overtime</u> amounts, and <u>Double Time</u> amounts in the appropriate fields.**
- **You can select <u>Save and Complete Later</u> if you need to come back later to finish your contribution entry. This will save what you already input and lets you pick up where you left off.**
- **Once all employees' hours and wages are entered, click on <u>Calculate Contribution</u>, at which point the following screen will show:**

Enter a New Form – Calculate Contributions

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Process Contribution

Contribution Batch

Contractor Name:	EMPLOYER NAME	**Contractor ID:**	00123
Batch Number:	CW18-00000028	**Work End Date:**	11/30/2018
CBA:	00 - STRUCTURAL JOURNEYMAN		

Contractor Contribution Details:

Contractor	Gross	Straight Time	Overtime	Double Time	Amount	
EMPLOYER NAME	3,000.00	105.00	17.25	7.50	$3,342.52	View Details
TOTAL	**3,000.00**	**105.00**	**17.25**	**7.50**	**$3,342.52**	

Employee Contribution Details:

SSN	First Name	MI	Last Name	Appr Level	Gross	Straight Time	Overtime	Double Time	Amount	
123456789	John		Doe		3,000.00	105.00	17.25	7.50	$3,342.52	View Details
TOTAL					**3,000.00**	**105.00**	**17.25**	**7.50**	**$3,342.52**	

[Back] [Finalize Contribution] [Cancel]

- **The <u>View Details</u> link under Contractor Contribution Details will show you a breakdown of all calculated fringes.**
    - **See next page for option to not pay certain fringes on all employees.**
- **The <u>View Details</u> link under Employee Contribution Details will show you a breakdown of all calculated fringes for that particular employee.**
    - **See page after next for option to not pay certain fringes on a specific employee**
- **The <u>Back</u> button will return you to the prior screen and adjust contributions information. *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 you feel that all the information you've entered is correct, click the <u>Finalize Contribution</u> button. Note: once you've clicked <u>Finalize Contribution</u>, you cannot go back and make changes.**

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Enter a New Form - Contractor Details

Contractor Contribution Details

Contractor Name: EMPLOYER NAME

Fund Name	Units	Basis	Rates	Amount
Health	3,000.00	Gross	0.2115	$634.50
Pension	3,000.00	Gross	0.5930	$1,779.00
Vac/Dues	3,000.00	Gross	0.1555	$466.50
Training	129.75	Hours Worked	0.3700	$48.01
Advance	129.75	Hours Worked	0.2000	$25.95
Spec Assm	129.75	Hours Worked	0.0700	$9.08
Def. Contrib	3,000.00	Gross	0.1126	$337.80
Impact	129.75	Hours Worked	0.2200	$28.55
Train Mbr	145.88	Hours2	0.0900	$13.13
				Total: $3,342.52

Close

- **To elect to not pay an optional fringe for ALL EMPLOYEES, click on the <u>View Details</u> link under Contractor Contribution Details next to the Work Class for which you would like to not pay the optional fringe.**
  - **Check the <u>Overwrite</u> box next to fringe(s) you are not paying.**
  - **Click <u>Save</u> to save and this will overwrite the fringe amount to $0.**
  - **When overriding a fringe at the contractor level, the amount contributed for that fringe cannot be changed.**

Note: You should only use this option if you have a signed agreement that states you do not have to pay a specified fringe. All forms are checked when they are submitted and if you do not pay a fringe you are required to pay, you may be assessed liquidated Damages.

Enter a New Form - Contractor Details

Employee Contribution Details

First Name: John   **Last Name:** Doe

Overwrite	Fund	Units	Basis	Rate	Amount
☐	Health	3,000.00	Gross	0.2115	$634.50
☐	Pension	3,000.00	Gross	0.5930	$1,779.00
☐	Vac/Dues	3,000.00	Gross	0.1555	$466.50
☐	Training	129.75	Hours Worked	0.3700	$48.01
☐	Advance	129.75	Hours Worked	0.2000	$25.95
☐	Spec Assm	129.75	Hours Worked	0.0700	$9.08
☐	Def. Contrib	3,000.00	Gross	0.1126	$337.80
☐	Impact	129.75	Hours Worked	0.2200	$28.55
☐	Train Mbr	145.88	Hours2	0.0900	$13.13
					Total: $3,342.52

Save   Close

- **To elect to not pay an optional fringe for ONE EMPLOYEE, click on the <u>View Details</u> link under Employee Contribution Details next to the employee for whom you would like to not pay the optional fringe.**
  - **Check the <u>Overwrite</u> box next to fringe(s) you are not paying.**
  - **In the amount field for the fringe that is to be overwritten, enter 0.00, or whatever the correct amount is.**
  - **Click <u>Save</u> to save and this will overwrite the fringe amount to $0 or the amount you entered.**

Note: You should only use this option if you have a signed agreement that states you do not have to pay a specified fringe. All forms are checked when they are submitted and if you do not pay a fringe you are required to pay, you may be assessed liquidated Damages.

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Enter a New Form - Finalize Contributions

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Contribution Batch

Contractor Name:	EMPLOYER NAME		**Contractor ID:**	001232
Batch Number:	CW18-00000030		**Work End Date:**	11/30/2018
CBA:	00 - STRUCTURAL JOURNEYMAN			

INVOICE # CW18-00000018

Your Calculated Contributions for work ending 11/30/2018:	$3,342.52
Remittance Amount Due:	$3,342.52
Invoice #:	CW18-00000018 * 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:	12/28/2018

[Pay Now] [Print Invoice] [Done]

Amount Due:

Work Class	Fund	Fund Code	Gross	Straight Time	Overtime	Double Time	Calc Hrs	Basis	Rate	Amount
DFLT	Health	H & W	3,000.00	105.00	17.25	7.50	3,000.00	Gross	0.2115	$634.50
DFLT	Pension	Pens	3,000.00	105.00	17.25	7.50	3,000.00	Gross	0.5930	$1,779.00
DFLT	Vac/Dues	Vac/D	3,000.00	105.00	17.25	7.50	3,000.00	Gross	0.1555	$466.50
DFLT	Training	Train	3,000.00	105.00	17.25	7.50	129.75	Hours Worked	0.3700	$48.01
DFLT	Advance	Adv	3,000.00	105.00	17.25	7.50	129.75	Hours Worked	0.2000	$25.95
DFLT	Spec Assm	Sp As	3,000.00	105.00	17.25	7.50	129.75	Hours Worked	0.0700	$9.08
DFLT	Def. Contrib	Def C	3,000.00	105.00	17.25	7.50	3,000.00	Gross	0.1126	$337.80
DFLT	Impact	Impac	3,000.00	105.00	17.25	7.50	129.75	Hours Worked	0.2200	$28.55
DFLT	Train Mbr	TranM	3,000.00	105.00	17.25	7.50	145.88	Hours2	0.0900	$13.13
TOTAL										**$3,342.52**

Employee Details:

Name	ApprLevel	G	ST	OT	DT	H & W	Pens	Vac/D	Train	Adv	Sp As	Def C	Impac	TranM
Doe, John		$3,000.00	105.00	17.25	7.50	$634.50	$1,779.00	$466.50	$48.01	$25.95	$9.08	$337.80	$28.55	$13.13
TOTAL		$3,000.00	105.00	17.25	7.50	$634.50	$1,779.00	$466.50	$48.01	$25.95	$9.08	$337.80	$28.55	$13.13

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

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Enter a New Form - Pay Invoice(s)

- **After selecting Pay Now you will be taken to the Pending Payments 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 (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)

- **After clicking <u>Select Invoice</u>, the invoices 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, please click <u>Make Payment</u>.**
    - o **Use the <u>Edit Selection</u> option if you selected the wrong invoice(s). This will allow you to change your selections.**

Enter a New Form - Pay Invoice(s)

- **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 input you are required to also enter the reason for the adjustment in the Adjustment Reason box (e.g. Liquidated Damages or Over/Under payment for a prior period).**

Invoice#	Wrk Date	Section	Cont No.	Amount
CW18-00000018	11/30/2018	STRUCTURAL JOURNEYMAN	001283	$3,342.52
TOTAL				$3,342.52

Welcome Democontractor — Last Signed In: Friday, December 28, 2018

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Make Payment

Total Invoice Amount : $3,342.52

Invoice Adjustment Amount: $0.00

Total Amount Due: $3,342.52

Adjustment Reason:

Pay By: ● ACH(Online) ○ Check

Submit Cancel Back

- **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.**
      - **If your company requires an Approver be notified when an ACH payment is processed, you can add them to the Approver Email List.**

Manage Account

Select Contractor:

* Routing Number:

* Bank Account Number:

* Account Type: ● Checking ○ Saving
Bank Name:

5KVQ0

Get New Image

* Please enter the characters as shown in the image.

Submit Cancel

Approver Email List

Add New Approver

No Approver list found.

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ACH Payment

If payment is not made by the 26th of the month, cost of collection charges shall be assessed at three percent (3%) over the prime rate established by Comerica Bank, on the date the delinquency first occurs, plus reasonable attorney fees required to collect the delinquent contributions and cost of collection charges.

Total Amount Due: **$3,342.52**

Bank Account Number: (Last 4 digits) **1234**

Routing Number: (Last 4 digits) **1234**

Bank Name: **My Financial Institution**

Account Type: **Checking**

Settlement Date: 1/2/2019

[Edit Account] [Submit] [Cancel]

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

- o **Once on the ACH Payment screen:**
  - ▪ **Input a settlement date for when you would like the funds withdrawn from your account. _Note_ that, 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 <u>Submit</u>, 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 <u>Submit</u> on the Make a Payment screen, you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check.**

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Modify A Saved Contribution Form

- **If you select <u>Modify / Submit Saved Contribution</u> 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

1. **Select a saved batch form from the Batch Number drop down list.**
2. **Click the <u>Submit</u> button.**
3. **The rest of the process is the same as entering a new contribution form (refer to instructions above).**

Upload a Contribution File

- **If you select <u>Upload Contribution File</u> from the Electronic Contribution page, you can upload employee hour & wage data directly into the system from a data file in .CSV or .TXT format. These files can normally be extracted from your company's payroll system. Using this option can be helpful when there are a large number of employees for whom fringe contributions are being reported.**
    1. **Select a <u>Work Start Date</u> and <u>Work End Date</u>. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the payroll start and ending dates.**
    2. **Select the appropriate CBA based on the work you are reporting for. This will pull the related fringe rates.**
    3. **Click the <u>Browse</u> button to find the .CSV or .TXT file 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 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	First	Last	MI	Gross	Straight	Overtime	Doubletime
	A	B	C	D	E	F	G	H
1	123456789	John	Doe		3000	105	17.25	7.5

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Upload a Contribution File

Welcome Democontractor					Last Signed In: Friday, December 28, 2018
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Contribution Entry Form

Contribution Batch

Contractor Name:	EMPLOYER NAME		Contractor ID:	00123
Batch Number:	CW18-00000033		Work End Date:	11/30/2018
CBA:	00 - STRUCTURAL JOURNEYMAN			

🖫 Rate Inquiry   ⊕ Add Employee   ⊗ Delete Employee   🖫 Save and Complete Later   🖩 Calculate Contribution   ⊘ Cancel

Row No	SSN	First Name	MI	Last Name	Gross	Straight Time	Overtime	Double Time	Delete?
	123456789	Doe		John	3000.00	105.00	17.25	7.50	☐
2					0.00	0.00	0.00	0.00	☐

- **Upon clicking <u>Submit</u>, you should be taken to a screen that looks similar to the above. If, however, your data or file format is incorrect, you will receive an error message and the file will not be uploaded.**
- **Once the file has been successfully uploaded, you can proceed as if you were entering a new contribution form (refer to instructions above).**

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Copy/Modify Previous Report Form

- **If you select 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 ending 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 hours & wages 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

- **You can view all your previously submitted contributions by selecting the <u>View All Contributions</u> link as shown above.**

How to View Past Contribution Forms

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View All Contributions

Select Contractor: [Select Contractor ▼]   Begin Date: 11/28/2018 [▼]   End Date: 12/28/2018 [▼]

[Search]

Special Note: A nightly process is set up to process ACH payments on the same day of entry. If you wish to delete a form that is associated to an ACH payment you must do this the same day of entry before the nightly process takes place. If you have multiple forms associated with one payment please be advised that deletion of one form will automatically place a stop on your ACH payment.

- **Once on the View All Contributions screen, you can select a contractor name from the drop down list (some contractors can have multiple contractor numbers to choose from based upon how their user ID 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

Welcome Democontractor						Last Signed In: Friday, December 28, 2018	

Home	Electronic Contribution	Contribution Payment	Employer Information	News	Contact Us

View All Contributions

Select Contractor: `00123  |  EMPLOYER NAME ▾`   Begin Date: `11/28/2018 ▾`   End Date: `12/28/2018 ▾`

[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
CW18-00000020	11/30/2018	00	STRUCTURAL JOURNEYMAN	1	001283	EMPLOYER NAME	$3,342.52	Pending			DemoContractor	12/28/2018	☐
CW18-00000019	11/30/2018	00	STRUCTURAL JOURNEYMAN	17	001283	EMPLOYER NAME	$0.00	Pending			DemoContractor	12/28/2018	☐
CW18-00000018	11/30/2018	00	STRUCTURAL JOURNEYMAN	1	001283	EMPLOYER NAME	$3,342.52	Pending	ACH	01/02/2019	DemoContractor	12/28/2018	☐
CW18-00000014	11/30/2018	00	STRUCTURAL JOURNEYMAN	17	001283	EMPLOYER NAME	$4,456.69	Pending	CHK		DemoContractor	12/28/2018	☐
CW18-00000013	12/31/2018	X00	MAIN CONTRACT STRUCTURAL JOURNEYMAN	2	001283	EMPLOYER NAME	$6,531.09	Pending			DemoContractor	12/26/2018	☐
CW18-00000008	12/30/2018	XA2	MAIN CONTRACT STRUCTURAL APPRENTICE 3	3	001283	EMPLOYER NAME	$3,759.43	In Process		12/20/2018	DemoContractor	12/17/2018	
CW18-00000002	11/30/2018	X00	MAIN CONTRACT STRUCTURAL JOURNEYMAN	5	001283	EMPLOYER NAME	$9,698.06	In Process		12/20/2018	DemoContractor	12/17/2018	
CW18-00000001	11/30/2018	0A1	STRUCTURAL APPRENTICE 1	6	001283	EMPLOYER NAME	$8,259.23	In Process		12/20/2018	DemoContractor	12/17/2018	
CW18-00000003	12/31/2018	X00	MAIN CONTRACT STRUCTURAL JOURNEYMAN	5	001283	EMPLOYER NAME	$19,760.15	In Process	ACH	12/18/2018	DemoContractor	12/17/2018	

[Delete Contribution(s)]

- **If you wish to delete any of the invoices shown, you may do so from this screen, however, _you can only_ delete invoices with a "Pending" status. To delete these invoices, check the box in the Del column next to the invoices to be deleted, then click the Delete Contribution button at the bottom of the page.**
- **To delete invoices with an "In Process" status, you will need to contact the fund office.**
- **Invoices with a "Paid" status cannot be deleted, as these have already been processed and entered into the contributions system.**

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How to Make Payments on Multiple Saved Forms

- **If you have entered and saved multiple invoices and have not yet processed a payment for them, you can process one payment for multiple invoices, whether by ACH or Check.**
- **From the Contribution Payment dropdown menu choose <u>Make a Payment</u> (see above).**

How to Make Payments on Multiple Saved Forms

- **Once on the Make a Payment screen, all contribution forms that have not been finalized for payment will be listed.**
- **If you would like to filter the unpaid invoices, you can enter an <u>Invoice Begin</u> and <u>Invoice End</u> date to narrow or widen your search results.**
- **To pay invoice(s), check the box to the left of the Invoice # for the forms that you would like to pay, then click the <u>Select Invoice</u> button. This will combine all forms you selected into one payment amount and you can continue to make your payment through the normal payment process (refer to instructions above).**

Questions/Concerns

For questions, enrollment, or training, please call (248) 347-3100 or Toll Free (800) 572-8553 and ask to speak with someone from our Contributions Team.