International Union of Operating Engineers Local 324 Health & Welfare and Retirement 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:

http://www.oe324stationaryemployers.org

International Union of Operating Engineers Local 324 Health and Welfare Fund Electronic Contributions

| Login |
|---|
| Thursday, June 15, 2017 |
| * User Name: _____ |
| * Password: _____ |
| Login |
| Create an Account Forgot Password? |

Logging into the Site

- **First Time Users**
  - **Click on "Create an Account"**
  - **Complete the form using the 16-digit identification number and contactor number provided in your website introduction letters**
  - **Create you own User Name and Password**
  - **Click on "Submit" to complete your registration. An email confirming your registration will be sent to you**
  - **Log in using the User Name and Password you created**

- **Returning Users**
  - **Enter User Name and Password**
  - **Click on "Login"**
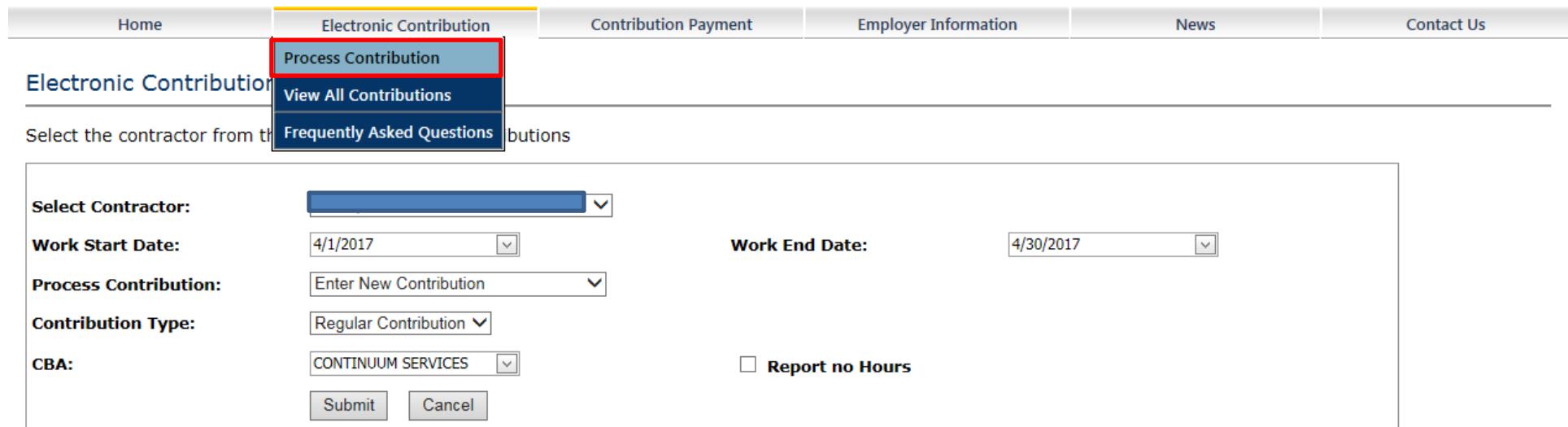
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Lets Get Started

Creating and Processing Contributions

- **Click on "Electronic Contribution" tab**
  - **Select "Process Contribution" as shown above**

Processing Contributions

Select Contractor: [blank dropdown]

Work Start Date: 4/1/2017

Process Contribution: Enter New Contribution

Contribution Type: Regular Contribution

CBA: CONTINUUM SERVICES

[Submit] [Cancel]

There are four action options in the "Process Contribution drop down menu:

- **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

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Entering a New Form

Select Contractor:	[blank dropdown ▼]		
Work Start Date:	4/1/2017 ▼	**Work End Date:**	4/30/2017 ▼
Process Contribution:	Enter New Contribution ▼		
Contribution Type:	Regular Contribution ▼		
CBA:	CONTINUUM SERVICES ▼	☐ **Report no Hours**	

[Submit] [Cancel]

This screen allows you to enter a new Contribution form

1. Select the <u>Contractor</u> - **If you only submit Contributions for one Contractor, this option will default to that Contractor. If you have a Login that allows you to submit Contributions for multiple Contractors, the drop-down menu will allow you to select the applicable 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. Select the <u>Contribution Type.</u> **For the Operating Engineers Local 324, this should always be <u>Regular Contribution</u>.**
5. Select the appropriate <u>CBA</u> - **this will apply the appropriate fringe rates**

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Enter a New Form - Contribution Entry

Contribution Batch

Contractor Name:	CMC MAINTENANCE SAULT ST. MARI	Contractor ID:	62
Batch Number:		Work End Date:	09/30/2023
CBA:	RET - Retirement		

🖋 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	HW Units	Gross Wages	Hours	Weeks Worked	401k	Roth
1		DEFAULT WORK CLASSIFICATION ⌄				0.00	0.00	0.00	0.00	0.00	0.00

This screen allows you to enter and verify the information for each employee.

- **Existing Employees** - Employee information will automatically populate for existing employees based on the CBA entered on the previous screen.
- **Adding an Employee** – Complete the fields in the blank row with the new employee's information. Multiple employees may be added in this manner.
- **Your CBA will determine the fields you need to enter. Blank amounts are not allowed.**
- You can select <u>Save and Complete Later</u> 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 <u>Calculate Contribution</u>, and the following screen shows.

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Enter a New Form – Calculate Contributions

Process Contribution

Contribution Batch

Contractor Name:		**Contractor ID:**	2425
Batch Number:	CW17-00000066	**Work End Date:**	04/30/2017
CBA:	2425 - CONTINUUM SERVICES		

Contractor Contribution Details:

Work Class	Contractor	HW Units	Amount	
E+1,CB970,Rx5/10/15,D9,VIS		20.00	$31,547.40	View Details
TOTAL		**20.00**	**$31,547.40**	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	HW Units	Amount	
678999821	E+1,CB970,Rx5/10/15,D9,VIS	Data	M	Test	20.00	$31,547.40	View Details
TOTAL					**20.00**	**$31,547.40**	

Back | Finalize Contribution | Cancel

This screen allows you to see how fringes are calculated. Modifications may also be made from this screen

- **Contractor Contribution Details -** <u>View Details</u> button shows screen with breakdown of calculated fringes
- **Employee Contribution Details -** <u>View Details</u> button shows fringes calculated for that Employee.
- <u>Back</u> button, select this to go back to prior screen and adjust contribution 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.
- <u>Finalize Contribution</u> button – Select this when you agree with all the information. Once you select this you cannot go back and make any changes, so make sure everything is correct before Finalizing.

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Enter a New Form - Finalize Contributions

Contribution Batch

Contractor Name:		**Contractor ID:**	2425
Batch Number:	CW17-00000066	**Work End Date:**	04/30/2017
CBA:	2425 - CONTINUUM SERVICES		

INVOICE # CW17-00000027

Your Calculated Contributions for work ending 04/30/2017:	$31,547.40
Remittance Amount Due:	$31,547.40
Invoice #:	CW17-00000027 * 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:	05/16/2017

[Pay Now] [Print Invoice] [Done]

Amount Due:

Work Class	Fund	Fund Code	HW Units	Calc Hrs	Basis	Rate	Amount
E+1,CB970,Rx5/10/15,D9,VIS	MEDICAL	MED	20.00	20.00	HW Units	1,126.9500	$22,539.00
E+1,CB970,Rx5/10/15,D9,VIS	PRESCRIPTION DRUG	RX	20.00	20.00	HW Units	351.8100	$7,036.20
E+1,CB970,Rx5/10/15,D9,VIS	DENTAL	DEN	20.00	20.00	HW Units	86.0700	$1,721.40
E+1,CB970,Rx5/10/15,D9,VIS	VISION	VIS	20.00	20.00	HW Units	12.5400	$250.80
TOTAL							**$31,547.40**

Employee Details:

Name	Work Class	HW	MED	RX	DEN	VIS
Test, Data M	E+1,CB970,Rx5/10/15,D9,VIS	20.00	$22,539.00	$7,036.20	$1,721.40	$250.80
TOTAL		**20.00**	**$22,539.00**	**$7,036.20**	**$1,721.40**	**$250.80**

This screen allows you to pay, print or return to enter another contribution form.

- **Pay Now** – select this option to go to the Pending Payment page to remit payment via ACH or Check.
- **Print Invoice** – select this option to print a copy of the invoice for your records.
- **Done** – select this option to enter another contribution form before making your payment

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Enter a New Form - Pay Invoice(s)

Pending Payment

Select Contractor:	[dropdown] ∨	**Invoice Number:**	[ ]
* **Invoice Begin Date:**	4/16/2017 ∨	* **Invoice End Date:**	5/16/2017 ∨

Search   Clear

In accordance with the IUOE Local 324 Health and Welfare Fund Collection Policy, contribution reports and payments are due on the 1st day of the month prior to the coverage month and must be received by the last day of the month prior to the coverage month. Liquidated damages are assessed at 5% for reports received from the 1st-5th day of the coverage month, 10% if received from the 6th-15th, 15% if received from the 16th-25th, or 20% if received from the 26th of the coverage month or thereafter. Please note that inadvertent submission of contributions to an incorrect address, location or entity will not constitute proper submission under the Collection Policy.

Pending Invoice:

Select Invoice   Cancel

☑	**Invoice #**	**Wrk Date**	**Section Code**	**Section**	**Cont No.**	**Amount**	**Submitted By**	**Trans. Date**
☑	CW17-00000027	04/30/2017	2425	CONTINUUM SERVICES	2425	$31,547.40	DemoContractor	05/16/2017

Select Invoice   Cancel

- **After selecting Pay Now, you will be taken to the Pending Payments page**
  - Select the "Search button to display any pending invoices. *Please pay for Retirement and Healthcare invoices separately*. The Search button will show all Contribution Forms entered on the website that remain unpaid.
  - Select the Open Invoice(s) for which you would like to remit a payment (ACH or Check)
- **Once you check the box(s) to the left of the invoice(s) desired, click the Select Invoice button.**

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Enter a New Form - Pay Invoice(s)

Pending Payment

Payment Summary

(1) Invoice Selected

Total amount due: $31,547.40

| Make Payment | Edit Selection |

| **Select Contractor:** | [▼] | **Invoice Number:** | [   ] |
| *** Invoice Begin Date:** | 4/16/2017 [▼] | *** Invoice End Date:** | 5/16/2017 [▼] |

| Search | Clear |

In accordance with the IUOE Local 324 Health and Welfare Fund Collection Policy, contribution reports and payments are due on the 1st day of the month prior to the coverage month and must be received by the last day of the month prior to the coverage month. Liquidated damages are assessed at 5% for reports received from the 1st-5th day of the coverage month, 10% if received from the 6th-15th, 15% if received from the 16th-25th, or 20% if received from the 26th of the coverage month or thereafter. Please note that inadvertent submission of contributions to an incorrect address, location or entity will not constitute proper submission under the Collection Policy.

Pending Invoice:

| Select Invoice | Cancel |

☑	**Invoice #**	**Wrk Date**	**Section Code**	**Section**	**Cont No.**	**Amount**	**Submitted By**	**Trans. Date**
☑	CW17-00000027	04/30/2017	2425	CONTINUUM SERVICES	2425	$31,547.40	DemoContractor	05/16/2017

| Select Invoice | Cancel |

- Selected invoice(s) will be highlighted orange on screen and in the upper left portion of the screen under "Pending Payment". The "Payment Summary" section shows the total amount due for the selected Invoice(s).
- If the amount is okay, please select <u>Make Payment</u>.
  - Use the <u>Edit Selection</u> option to change your selections if you selected the wrong Invoice(s).

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Enter a New Form - Pay Invoice(s)

Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW17-00000027	04/30/2017	CONTINUUM SERVICES	2425	$31,547.40
TOTAL				$31,547.40

Total Invoice Amount : $31,547.40

Invoice Adjustment Amount: $0.00

Total Amount Due: $31,547.40

Adjustment Reason:

Pay By: ⦿ ACH(Online)   ◯ Check

[Submit]   [Cancel]   [Back]

- **Select your Payment Type**
    - **Paying by ACH**
        - **If you select to 'Pay By' ACH (Online) you will click submit and be taken to the next step.**
        - **First time ACH payments - you will be prompted to enter required info**

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Enter a New Form - Pay Invoice(s)

> **Total Amount Due:** $31,547.40
>
> **Bank Account Number:** (Last 4 digits) 6464
>
> **Routing Number:** (Last 4 digits) 0096
>
> **Bank Name:** COMERICA BANK
>
> **Account Type:** Checking
>
> **Settlement Date:** 5/18/2017
>
> [Edit Account] [Submit] [Cancel]
>
> *Note:Click Edit Account to correct your bank account.

- **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 382243531**
- **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, the information is saved and only needs to be updated if changed. If your company requires an Approver be notified when an ACH payment is processed, you can add in a list of approvers.**

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- **Settlement Date – date on which the funds will be withdrawn from your account. There is a two business dat lag for ACH transactions to be recorded in the Fringe fund bank account. Please take this into consideration when submitting your payment and selecting a Settlement Date.**
- **Select <u>Submit</u> to go to the "Payment Confirmation" page. This page will automatically be saved under the "Contribution Payments" tab of the website and can also be printed for your records.**

- **<u>Paying by Check</u>**
  - **<u>Pay By Check</u> –**
    - **Select the "Check" button**
    - **Click Submit – After you select submit you will be taken to a Payment Confirmation page.**
    - **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 ⌄]

Batch Number | CBA | Work StartDate | Work EndDate
*Batch Number: [⌄]

[Cancel]

- **Modify/Submit Saved Contribution** – **allows you to open up a saved Contribution Form and continue where you left off.**
  - o **Contribution Forms that have not been submitted are only saved for 30 days.**
  - o **Contribution Forms that have been submitted are saved permanently.**

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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 ∨

Batch Number | CBA | Work StartDate | Work EndDate
*Batch Number: ∨

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 page 5 above)

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Upload a Contribution File

Select Contractor:	[dropdown]
Work Start Date:	4/1/2017	**Work End Date:**	4/30/2017
Process Contribution:	Upload Contribution File
Contribution Type:	Regular Contribution
CBA:	CONTINUUM SERVICES
*File Name:	[_____] Browse...
	Submit Cancel

This screen allows you to upload a file directly onto the website.

1. **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.
2. 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.
3. Select the proper CBA - this will pull in the appropriate fringe rates
4. Use the **Browse** Button to find the CSV or TXT file that you want to use

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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 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 Title line (row 1; SSN, Work Class, Last Name, etc.) cannot be in the file you try to upload as it will cause errors when uploading. Row 1 should contain Employee info.

SSN	Work Class	Last Name	First Name	Middle Name	HW Units
123456789	Conversion	Test	Data	M	15

- **If data is incorrect you will get an error and the file will not be uploaded. The file will need to be corrected to match format described above before uploading the file again.**

- **Once the .CSV or .TXT file has been successfully uploaded, you can proceed by following the instructions for entering a New Contribution Form (refer to instructions above).**

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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 duplicated 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 <u>New Work Start</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.**
- **Select <u>Copy/Modify Previous Report Form</u> from the <u>Process Contribution</u> drop down box.**
- **Select the <u>Invoice Number</u> of the invoice you would like to copy from the drop down box.**
- **Check the appropriate box to <u>zero out any information</u> from the copied data. This will zero hours & wages**
- **Press the <u>Submit</u> button.**

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- **The rest of the process is exactly like entering a New Contribution Form (refer to instructions above).**

How to View Past Contribution Forms

Home	Electronic Contribution	Contribution Payment	Employer Information	News

View All Contributions

Select Contractor: [▾]   **Begin Date:** 10/17/2016 ▾   **End Date:** 11/17/2016 ▾

Search

- **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**

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How to View Past Contribution Forms

View All Contributions

Select Contractor: [▾]   **Begin Date:** 4/16/2017 [▾]   **End Date:** 5/16/2017 [▾]

[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
CW17-00000027	04/30/2017	2425	CONTINUUM SERVICES	1	2425		$31,547.40	Pending			DemoContractor	05/16/2017	☐
CW17-00000024	04/30/2017	2425	CONTINUUM SERVICES	5	2425		$144,314.25	Pending	ACH	05/11/2017	DemoContractor	05/09/2017	
CW17-00000018	03/31/2017	2425	CONTINUUM SERVICES	5	2425		$115,451.40	In Process	CHK		DemoContractor	04/21/2017	
CW17-00000017	03/31/2017	2425	CONTINUUM SERVICES	5	2425		$134,693.30	In Process			DemoContractor	04/21/2017	

[Delete Contribution(s)]

- **Invoices in "Pending" status may be deleted if necessary**
  - **Select each box in the "Del" column associated with the invoice(s) to be deleted**
  - **Click the "Delete Contribution" button at the bottom of the page.**
- **To delete invoices that are in an "In Process" status, contact the Fund Office.**

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- **Invoices with a "Paid" status cannot be deleted.**

How to Make Payments on Multiple Saved Forms

A single ACH or Check payment can be made for multiple saved invoices.

- **From the Contribution Payment dropdown menu choose Make a Payment**

How to Make Payments on Multiple Saved Forms

Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: $31,547.40

[Make Payment] [Edit Selection]

Select Contractor: [▼]   **Invoice Number:** [   ]

* **Invoice Begin Date:** [4/16/2017 ▼]   * **Invoice End Date:** [5/16/2017 ▼]

[Search] [Clear]

In accordance with the IUOE Local 324 Health and Welfare Fund Collection Policy, contribution reports and payments are due on the 1st day of the month prior to the coverage month and must be received by the last day of the month prior to the coverage month. Liquidated damages are assessed at 5% for reports received from the 1st-5th day of the coverage month, 10% if received from the 6th-15th, 15% if received from the 16th-25th, or 20% if received from the 26th of the coverage month or thereafter. Please note that inadvertent submission of contributions to an incorrect address, location or entity will not constitute proper submission under the Collection Policy.

Pending Invoice:

[Select Invoice] [Cancel]

☑	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
☑	CW17-00000027	04/30/2017	2425	CONTINUUM SERVICES	2425	$31,547.40	DemoContractor	05/16/2017

[Select Invoice] [Cancel]

- **The Pending Payment screen will appear showing contribution form 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 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.**

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Questions/Concerns

For Training and Enrollment, please call us at (248) 641-4915, and ask to speak with someone from our Contributions Team.