

UBC National 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 copy/modify a previous contribution form.
- How to view and delete contribution forms.
- How to pay multiple saved invoices.

Web Address: www.UBCNationalFunds.com



United Brotherhood of Carpenters National Funds

Login

Wednesday, November 25, 2020

* User Name:

* Password:

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

Home

Electronic Contribution

Site Information

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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 into this site, you will need to contact the BeneSys office to receive an introduction letter. To register click on the “Create an Account” option in the top right corner of the website. You will need to create a username, password, and an identification number which was received with your letter.**
- **A second option is to contact the benefit office at (833) 958-0862 or (702) 415-2192 for assistance.**

Lets Get Started



United Brotherhood of Carpenters National Funds

Wednesday, November 25, 2020

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Welcome Democontractor Last Signed In: Wednesday, November 25, 2020

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Process Contribution
View All Contributions
Frequently Asked Questions

News / Events
No news is available.

Introduction

You now have the power to access information every 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.

- **To begin entering contribution information, mouse over the Electronic Contribution tab and select Process Contribution as shown above.**
 - **This option will allow you to create and process contributions.**

Processing Contributions

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Entity:	T1 Test Contractor 1	Work Month Year:	2020
Work Month:	October		
Process Contribution:	Enter New Contribution Modify / Submit Saved Contribution		
Invoice Type:	Regular Contribution		
Region and Contribution Type:	Eastern Lump Sum Paymen		
	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.

Entering a New Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Entity:	T1 Test Contractor 1	Work Month Year:	2020
Work Month:	October		
Process Contribution:	Enter New Contribution		
Invoice Type:	Regular Contribution		
Region and Contribution Type:	Eastern Regular Contrib		
	Submit	Cancel	

1. Select the Entity: If you only submit contributions for one entity, that entity will show by default and you won't have other entities to select from. If you have a login that allows you to submit contributions for multiple entities, click the drop-down arrow and a list of entities you submit for will show, from which you can select the desired entity.
2. Select a Work Month and Work Year. If you are remitting for a quarter, please use the last month of the quarter.
3. Select Enter New Contribution.
4. The contribution type should always be Regular Contribution.
5. Select the appropriate CBA based on the region and type of remittance you are reporting for. This will pull the related fringe rates.
6. Finally, click Submit to begin entry.

Enter a New Form - Contribution Entry

Contribution Entry Form

Contribution Batch			
Reporting Entity:	Test Contractor 1	Entity Number:	T1
Batch Number:	CW20-00000209	Work End Date:	10/31/2020
Region and Contribution Type:	EST-R - Eastern Regular Contrib		

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

If applicable, please select the appropriate CITF rate and enter the CITF hours in the appropriate field. Please enter Millwright, Piledriver, UBC per Capita and INSTALL (Floorcoverings) hours in the appropriate field if applicable. For lumpsum payments please enter the dollar amounts only. Also you are required to indicate what the lumpsum payment is for such as an audit payment or one-time payment.

Row No	CITF Rate Class	CITF Hours	UBC Per Capita	INSTALL Hours	Millwright Hours	Piledriver Hours	Delete?
1	CITF @\$0.15	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

- This screen allows you to enter and verify the information for each rate class. If applicable, please select the CITF rate you are to pay, multiple rates can be selected and paid on a single invoice.
- If the selected CBA was a regular contribution, enter the hours for each fund in the appropriate fields.
- If the selected CBA was a lump sum payment, enter the dollar amount for each fund in the appropriate fields.
- You can select Save and Complete Later 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 hours are entered, click on Calculate Contribution, at which point the following screen will show:

Enter a New Form – Calculate Contributions

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Process Contribution

Contribution Batch			
Reporting Entity:	Test Contractor 1	Entity Number:	T1
Batch Number:	CW20-00000209	Work End Date:	10/31/2020
Region and Contribution Type:	EST-R - Eastern Regular Contrib		

Entity Contribution Details:

CITF Rate Class	Reporting Entity	CITF Hours	UBC Per Capita	INSTALL Hours	Millwright Hours	Piledriver Hours	Amount	
CITF @ \$0.15	Test Contractor 1	1,000.00	150.00	350.00	200.00	200.00	\$172.50	View Details
TOTAL		1,000.00	150.00	350.00	200.00	200.00	\$172.50	

- The [View Details](#) link under Entity Contribution Details will show you a breakdown of all calculated fringes.
 - See next page
- The [Back](#) 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 [Finalize Contribution](#) button. Note: once you've clicked [Finalize Contribution](#), you cannot go back and make changes.

Enter a New Form - Contractor Details

Entity Contribution Details

Reporting Entity: Test Contractor 1
CITF Rate Class: CITF @ \$0.15

Fund Name	Units	Basis	Rates	Amount
UBC Dues	150.00	UBC Per Capita	0.05000	\$7.50
Carpenters TRNG	1,000.00	CITF Hours	0.15000	\$150.00
INSTALL	350.00	INSTALL Hours	0.02000	\$7.00
MW&PD Labor mgmt	400.00	MWPD Units	0.02000	\$8.00
				Total: \$172.50

Close

- To view fund total details, click on the [View Details](#) link under Entity Contribution Details next to the Rate Class for which you would like to view details.

Enter a New Form - Finalize Contributions

Contribution Batch			
Reporting Entity:	Test Contractor 1	Entity Number:	T1
Batch Number:	CW20-00000209	Work End Date:	10/31/2020
Region and Contribution Type:	EST-R - Eastern Regular Contrib		

INVOICE # CW20-00000054

Your Calculated Contributions for work ending 10/31/2020: **\$172.50**

Remittance Amount Due: **\$172.50**

Invoice #: **CW20-00000054**

Invoice Date: **11/25/2020**

Amount Due:

CITF Rate Class	Fund	Fund Code	Calc Hrs	Basis	Rates	Amount
CITF @ \$0.15	UBC Dues	DUES	150.00	UBC Per Capita	0.05000	\$7.50
CITF @ \$0.15	Carpenters TRNG	CITF	1,000.00	CITF Hours	0.15000	\$150.00
CITF @ \$0.15	INSTALL	INSTL	350.00	INSTALL Hours	0.02000	\$7.00
CITF @ \$0.15	MW&PD Labor mgmt	MWPD	400.00	MWPD Units	0.02000	\$8.00
TOTAL						\$172.50

- 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.
 - **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 Reporting Entity: Invoice Number:

* Invoice Begin Date: * Invoice End Date:

Contributions are due the first day of the third month following the month in which the work was performed. For example, July work, due Oct 1st.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Entity No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW20-00000054	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$172.50	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000053	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$49.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000052	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$27.50	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000051	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$49.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000050	10/31/2020	EST-LSP	Eastern Lump Sum Payment	T1	\$230.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000047	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$44.00	DEMOCONTRACTOR	11/24/2020

- 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).
- 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: **\$172.50**

Select Reporting Entity:
 Invoice Number:

* Invoice Begin Date:
 * Invoice End Date:

Contributions are due the first day of the third month following the month in which the work was performed. For example, July work, due Oct 1st.

Pending Invoice:

Invoice #	Wrk Date	Section Code	Section	Entity No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/> CW20-0000054	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$172.50	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/> CW20-0000053	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$49.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/> CW20-0000052	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$27.50	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/> CW20-0000051	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$49.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/> CW20-0000050	10/31/2020	EST-LSP	Eastern Lump Sum Payment	T1	\$230.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/> CW20-0000047	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$44.00	DEMOCONTRACTOR	11/24/2020

- After clicking Select Invoice, 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 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

Provide Payment Reasons for Adjustment / Lump Sum Payment.

Invoice#	Wrk Date	Section	Entity No.	Amount
CW20-00000054	10/31/2020	Eastern Regular Contrib	T1	\$172.50
TOTAL				\$172.50

Total Invoice Amount : **\$172.50**

Invoice Adjustment Amount:

Total Amount Due: **\$172.50**

Reason for Adjustment/Payment:

Pay By: ACH(Online)

- 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).
 - When using the lump sum payment 'Contribution Type' you are required to enter the reason for making the payment in the Adjustment Reason box (e.g. Audit fees or one-time payment).

- First time ACH payments will be prompted to complete the below form specifying your company name, bank account number, routing number, and account type.
- Canadian entities, when entering financial account details for electronic payments, please enter your transit number, bank number, and a “0” where routing number is requested. For example, if your transit number is 12345 and your bank number is 987, please enter 123459870 where routing number is requested. If you receive an error upon doing so, please contact the Administrator’s office who will request your transit and bank number so that it may be added to the system.
- This information will be saved for future contributions and only needs to be updated if it has changed.

The screenshot shows a web form with the following fields and options:

- Select Contractor:** A dropdown menu with a blacked-out name and "INC" at the end.
- * Routing Number:** A text input field.
- * Bank Account Number:** A text input field.
- * Account Type:** Radio buttons for **Checking** and **Saving**.
- Bank Name:** A large empty text area.
- Image:** A CAPTCHA image showing the characters "W2KFEJG" in a blue, pixelated font.
- Get New Image:** A button to refresh the CAPTCHA image.
- * Please enter the characters as shown in the image.** A text input field for the CAPTCHA characters.
- Submit** and **Cancel** buttons at the bottom.

Enter a New Form - Pay Invoice(s)

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ACH Payment

Contributions are due the first day of the third month following the month in which the work was performed. For example, July work, due Oct 1st.

Total Amount Due: **\$49.00**

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

Routing Number: (Last 4 digits) [REDACTED]

Bank Name: [REDACTED]

Account Type: Checking

Settlement Date: 11/30/2020

*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. **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. Please contact the Administrative Office to obtain the company IDs if you have an ACH block in place.**
- **After selecting Submit, 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.**

Modify A Saved Contribution Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Entity:	T1 Test Contractor 1 ▾
Process Contribution:	Modify / Submit Saved Contribution ▾
*Batch Number:	Batch Number Contribution Type Work StartDate Work EndDate <input type="text"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

- 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

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Entity: T1 | Test Contractor 1 ▼

Process Contribution: Modify / Submit Saved Contribution ▼

***Batch Number:** [Dropdown]

Batch Number	Contribution Type	Work Start Date	Work End Date
CW20-00000196	(EST-LSP) Eastern Lun	10/01/2020	10/31/2020
CW20-00000193	(EST-R) Eastern Regul	10/01/2020	10/31/2020
CW20-00000192	(EST-R) Eastern Regul	10/01/2020	10/31/2020
CW20-00000188	(EST-LSP) Eastern Lun	10/01/2020	10/31/2020
CW20-00000180	(EST-LSP) Eastern Lun	10/01/2020	10/31/2020
CW20-00000177	(EST-R) Eastern Regul	10/01/2020	10/31/2020

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1. Select a saved batch form 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).

How to View Past Contribution Forms

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Electronic Contribution

- Process Contribution
- View All Contributions**
- Frequently Asked Questions

Select the contractor from the list to submit contribution

Select Entity: T1 | Test Contractor 1 ▾

Work Month: October ▾ **Work Month Year:** 2020 ▾

Process Contribution: Enter New Contribution ▾

Invoice Type: Regular Contribution ▾

Region and Contribution Type: Eastern Lump Sum Payment ▾

- You can view all your previously submitted contributions by selecting the [View All Contributions](#) link as shown above.

How to View Past Contribution Forms

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View All Contributions

Select Reporting Entity: 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 reporting entity name from the drop down list (some entities can have multiple entity 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 entity you've selected (see below).**

How to View Past Contribution Forms

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View All Contributions

Select Reporting Entity: 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	Entity No.	Reporting Entity	Amount	Status	Payment	Deposit Dt	Submitter	Trans. Dt	Del
CW20-0000003	10/31/2020	EST-R	Eastern Regular Contrib	T1	Test Contractor 1	\$57.52	In Process	ACH	11/20/2020	DEMOCONTRACTOR	11/18/2020	
CW20-0000005	10/31/2020	EST-R	Eastern Regular Contrib	T1	Test Contractor 1	\$31.50	In Process	ACH	11/20/2020	DEMOCONTRACTOR	11/18/2020	
CW20-0000012	10/31/2020	EST-LSP	Eastern Lump Sum Payment	T1	Test Contractor 1	\$1,200.00	In Process			DEMOCONTRACTOR	11/17/2020	
CW20-0000009	10/31/2020	EST-A	Eastern Audit	T1	Test Contractor 1	\$3,700.00	In Process			DEMOCONTRACTOR	11/17/2020	
CW20-0000008	10/31/2020	EST-LSP	Eastern Lump Sum Payment	T1	Test Contractor 1	\$30,500.00	In Process			DEMOCONTRACTOR	11/17/2020	
CW20-0000007	10/31/2020	EST-R	Eastern Regular Contrib	T1	Test Contractor 1	\$370.00	In Process			DEMOCONTRACTOR	11/17/2020	
CW20-0000006	10/31/2020	EST-LSP	Eastern Lump Sum Payment	T1	Test Contractor 1	\$4,750.00	In Process			DEMOCONTRACTOR	11/17/2020	

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- 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 the following tabs: Home, Electronic Contribution, Contribution Payment, Employer Information, News, and Contact Us. The 'Contribution Payment' tab is active, and a 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 a white box containing the text 'No news is available.' Below the navigation bar, the main content area is titled 'Introduction' and contains the following text: 'You now have the power to access information 24 hours a day, 7 days a week.' Below this, there are three sections: 'To Navigate this site:' with a bullet point 'Click on a header on the top. This opens your submenu options.', 'To Log On:' with two bullet points 'There is a login box in the upper right corner.' and 'Enter your User Name and Password then click on the login button.', and 'If your login was successful you'll be directed to the appropriate page to begin.' and '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.**
- **From the Contribution Payment drop-down menu choose Make a Payment (see above).**

How to Make Payments on Multiple Saved Forms

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

Pending Payment

Select Reporting Entity: Invoice Number:

* Invoice Begin Date: * Invoice End Date:

Contributions are due the first day of the third month following the month in which the work was performed. For example, July work, due Oct 1st.

Pending Invoice:

<input type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Entity No.	Amount	Submitted By	Trans. Date
<input type="checkbox"/>	CW20-00000053	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$49.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000052	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$27.50	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000051	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$49.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000050	10/31/2020	EST-LSP	Eastern Lump Sum Payment	T1	\$230.00	DEMOCONTRACTOR	11/25/2020
<input type="checkbox"/>	CW20-00000047	10/31/2020	EST-R	Eastern Regular Contrib	T1	\$44.00	DEMOCONTRACTOR	11/24/2020

- 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 # for the forms that 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 benefit office
at (833) 958-0862 or (702) 415-2192.**