

Western UNITE HERE and Employers Pension Fund Contractor Contribution Website Quick Start Guide

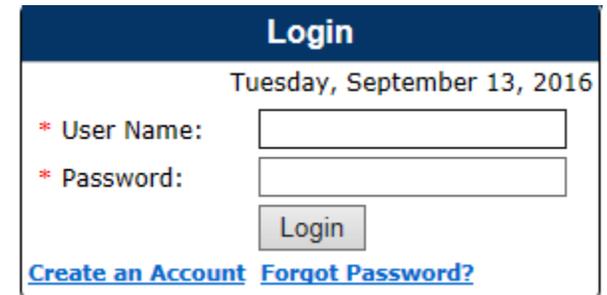
This guide is intended to show you the quick and easy way to enter contributions using your new Contributions Website. This guide will walk you through the following:

- How to Process a New Contribution Form.
- How to Process Payments via ACH.
- How to Modify a Saved Contribution Form.
- How to Upload a file to the Electronic Contributions site using a CSV File.
- How to Copy/Modify a previous Contribution Form.
- How to View and Delete Contribution Forms.
- How to pay multiple saved invoices.

Web Address:

<http://www.SIHRTEmployers.org>

Western UNITE HERE and Employers Pension Trust Fund



The screenshot shows a login interface with a dark blue header containing the word "Login". Below the header, the date "Tuesday, September 13, 2016" is displayed. There are two input fields: one for "User Name:" and one for "Password:", both preceded by a red asterisk. A "Login" button is positioned below the password field. At the bottom of the form, there are two blue links: "Create an Account" and "Forgot Password?".

- To log into this site, you will need a user ID and Password. To receive this, you will need to register by clicking on the “Create an Account” option in the top right corner of the website. To complete this step you will need a 16 digit identification number. This will be provided in a separate letter to be mailed to the address we have on file.
- A second option is to call, and someone will assist you.

Lets Get Started

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

Electronic Contribution

Select the contractor from the list to submit:

Select Contractor: [Dropdown]

Work Start Date: 8/1/2016 Work End Date: 8/31/2016

Process Contribution: Enter New Contribution

Contribution Type: Regular Contribution

CBA: Plan A Report no Hours

Submit Cancel

- **To begin entering employee contribution information, click on the Electronic Contribution Tab and select Process Contribution as shown above.**
 - **This option will allow you to create and process contributions**

Processing Contributions

Select Contractor:

Work Start Date:

Process Contribution:

Contribution Type:

CBA:

Work End Date:

Report no Hours

- **Enter New Contribution** – This allows Manual Data Entry of your Contribution Form
- **Modify/Submit Saved Contribution** – allows you to retrieve a previously entered and saved Contribution Form.
- **Upload Contribution File** – allows you to upload a data file exported from your payroll system (CSV format) directly into the system, it will automatically load Employee, hours and gross information.
- **Copy/Modify Previous Report Form** – This option will allow you to retrieve a previous months submitted Contribution Form and copy the information for the current months Contribution Form

Entering a New Form

Select Contractor:

Work Start Date:

Process Contribution:

Contribution Type:

CBA:

Work End Date:

Report no Hours

1. Select the Contractor: If you only submit Contributions for one Contractor that will show as your default and you won't have any other options. If you have a Login that allows you to submit Contributions for Multiple Contractors, click on the down-arrow and a list of Contractors you submit for will show, select desired Contractor.
2. Select a Work Start Date and Work End Date. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the Payroll Start and Ending dates.
3. Select Enter New Contribution.
4. The Contribution Type should always be Regular Contribution.
5. Select the appropriate CBA: based on the work you are reporting for, this will apply the appropriate fringe rates

Enter a New Form - Contribution Entry

Contribution Entry Form

Contribution Batch			
Contractor Name:	<input type="text"/>	Contractor ID:	29845
Batch Number:	CW16-00000126	Work End Date:	08/31/2016
CBA:	Plan A - Plan A		

Filter Criteria:

[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	Hours Worked	Monthly (Flat Rate)	Delete?
4		INDEMNITY BREAKAGE CLASS - MED/D	Data		Test	0.00	0.00	<input type="checkbox"/>
5		INDEMNITY BREAKAGE CLASS - MED/D				0.00	0.00	<input type="checkbox"/>

- This screen allows you to enter and verify the information for each employee. Employee information will automatically populate once you have entered the Social Security Number and Tab across the fields. New Employee's information will need to be manually entered in each field.
- Your agreement will determine the fields you need to enter. If you are paying Pension contributions you need to enter the SSN, Hours Worked, and Flat-rate. Also be sure to choose the proper Work Class. Blank amounts are not allowed.
- You can select Save and Complete Later if you need to do something else and come back later to finish your contribution entry, this save what you have currently input and lets you pick up where you left off.
- Once all employee's hours and wages are entered, click on Calculate Contribution, and the following screen shows.

Enter a New Form – Calculate Contributions

Process Contribution

Contribution Batch			
Contractor Name:	<input type="text"/>	Contractor ID:	29845
Batch Number:	CW16-00000126	Work End Date:	08/31/2016
CBA:	Plan A - Plan A		

Contractor Contribution Details:

Work Class	Contractor	Hours Worked	Monthly (Flat Rate)	Amount	
Indemnity Breakage Class - MED/D	<input type="text"/>	30.00	15.00	\$12,810.00	View Details
TOTAL		30.00	15.00	\$12,810.00	

Employee Contribution Details:

SSN	Work Class	First Name	MI	Last Name	Hours Worked	Monthly (Flat Rate)	Amount	
111222333	Indemnity Breakage Class - MED/D	Data		Test	30.00	15.00	\$12,810.00	View Details
TOTAL					30.00	15.00	\$12,810.00	

<input type="button" value="Back"/>	<input type="button" value="Finalize Contribution"/>	<input type="button" value="Cancel"/>
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- Screen allows you to see how fringes are calculated, you are also allowed to make modifications from this screen
 - Contractor Contribution Details [View Details](#) button shows screen with breakdown of calculated fringes
 - See next page for option to not pay certain fringes on all employees
 - Employee Contribution Details [View Details](#) button shows fringes calculated for that Employee.
- **Back** button, click this to go back to prior screen and adjust contributions information. At no time should you use the browser to return to the previous page (back arrow in upper left corner of browser window), that will cause all previously entered information to be lost.
- When you agree with all the information choose **Finalize Contribution** button, once you select this you cannot go back and make any changes, so make sure everything is correct before Finalizing.

Enter a New Form - Finalize Contributions

Contribution Batch

Contractor Name:	<input type="text" value=""/>	Contractor ID:	29845
Batch Number:	CW16-00000126	Work End Date:	08/31/2016
CBA:	Plan A - Plan A		

INVOICE # CW16-00000071

Your Calculated Contributions for work ending 08/31/2016: **\$12,810.00**

Remittance Amount Due: **\$12,810.00**

Invoice #: **CW16-00000071**
*** 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: **09/13/2016**

Amount Due:

Work Class	Fund	Fund Code	Hours Worked	Monthly (Flat Rate)	Calc Hrs	Basis	Rate	Amount
Indemnity Breakage Class - MED/D	Health and Welfare	H&W	30.00	15.00	15.00	Monthly (Flat Rate)	854.0000	\$12,810.00
TOTAL								\$12,810.00

Employee Details:

Name	Work Class	HW	FR	H&W
Test, Data	Indemnity Breakage Class - MED/D	30.00	15.00	\$12,810.00
TOTAL		30.00	15.00	\$12,810.00

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

Enter a New Form - Pay Invoice(s)

Pending Payment

Select Contractor:	<input type="text"/>	Invoice Number:	<input type="text"/>
* Invoice Begin Date:	8/13/2016 <input type="text"/>	* Invoice End Date:	9/13/2016 <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>			

An employer is considered delinquent if both the contribution report and funds are not received by the 20th of the first month following when the work was performed. Interest is calculated at:
2% of the principle amount owed from the delinquency date, if paid between 1st -15th of the second month following work.
4% of the principle amount owed from the original delinquency date, if paid between 16th-last of the second month following work.
6% of the principle amount owed from the original delinquency date, if paid between the 1st-15th of third month following work.
10% of the principle amount owed from the original delinquency date if not paid after third 15 day period.

Pending Invoice:

								<input type="button" value="Select Invoice"/>	<input type="button" value="Cancel"/>
<input checked="" type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date	
<input checked="" type="checkbox"/>	CW16-00000071	08/31/2016	Plan A	Plan A	29845	\$12,810.00	DemoContractor	09/13/2016	
								<input type="button" value="Select Invoice"/>	<input type="button" value="Cancel"/>

- After selecting Pay Now you go to the Pending Payments page. Press the “Search” button to display any pending invoices. The search button will show all Contribution Forms entered on the website that have not been paid for. Here, you will select the Open Invoice(s) which you would like to remit a payment for (ACH or Check).
- Once you check the box(s) to the left of the invoice(s) desired, click the Select Invoice button.

Enter a New Form - Pay Invoice(s)

Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: **\$12,810.00**

Make Payment Edit Selection

Select Contractor: Invoice Number:
* Invoice Begin Date: * Invoice End Date:
Search Clear

An employer is considered delinquent if both the contribution report and funds are not received by the 20th of the first month following when the work was performed. Interest is calculated at:
2% of the principle amount owed from the delinquency date, if paid between 1st -15th of the second month following work.
4% of the principle amount owed from the original delinquency date, if paid between 16th-last of the second month following work.
6% of the principle amount owed from the original delinquency date, if paid between the 1st-15th of third month following work.
10% of the principle amount owed from the original delinquency date if not paid after third 15 day period.

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"/>	CW16-00000071	08/31/2016	Plan A	Plan A	29845	\$12,810.00	DemoContractor	09/13/2016

Select Invoice Cancel

- This will show selected invoice(s) highlighted orange on screen and in upper left portion of screen under Pending Payment a “Payment Summary” section shows the total amount due for the selected Invoice(s).
- If the amount is okay, please select Make Payment.
 - Use the Edit Selection option if you selected the wrong Invoice(s) and you can change your selections.

Enter a New Form - Pay Invoice(s)

Make Payment

Invoice#	Wrk Date	Section	Cont No.	Amount
CW16-00000071	08/31/2016	Plan A	29845	\$12,810.00
TOTAL				\$12,810.00

Total Invoice Amount : **\$12,810.00**

Invoice Adjustment Amount:

Total Amount Due: **\$12,810.00**

Adjustment Reason:

Pay By: ACH(Online) Check

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

Enter a New Form - Pay Invoice(s)

Total Amount Due: \$12,810.00

Bank Account Number: (Last 4 digits) 5423

Routing Number: (Last 4 digits) 0358

Bank Name: BANK OF AMERICA, N.A., CA

Account Type: Checking

Settlement Date: 9/15/2016

**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 1934160766.
- If this is your first time setting up ACH you will be required to fill out a form and provide your bank account number, bank routing number and account type. For future contributions, info is saved and only needs to be updated if changed. If your company requires an Approver be notified when an ACH payment is process you can add in a list of people.

- **Input a settlement date for when you would like the funds withdrawn from your account, there is a 2 working day lag for ACH transaction to hit the Fringe fund bank account, so you must submit your payment 2 days prior to when you want it to be considered paid.**
- **After selecting Submit, you will be taken to a Payment Confirmation page. This can be printed for your records, plus it is saved under the Contribution Payments tab of the website.**
- **If you select to 'Pay By' Check, after you choose submit you will be taken to a Payment Confirmation page. You will need to print and mail this Payment Confirmation with your check**

Modify A Saved Contribution Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	<input type="text"/>
Process Contribution:	<input type="text" value="Modify / Submit Saved Contribution"/>
*Batch Number:	<input type="text" value="Batch Number CBA Work StartDate Work EndDate"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

- **Modify/Submit Saved Contribution** – allows you to open up a saved Contribution Form and continue where you left off. Contribution Forms are only saved for 30 days. Once you submit a Contribution Form, it is saved permanently, but prior to that, you have 30 days to complete the form.

Modify A Saved Contribution Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	<input type="text"/>
Process Contribution:	Modify / Submit Saved Contribution <input type="text"/>
*Batch Number:	Batch Number CBA Work StartDate Work EndDate <input type="text"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

1. Select a saved batch form from the 'Batch Number' drop down list. If you want to select a saved batch and change the collective bargaining agreement use the second Batch number option. *See red box above.
2. Press the Submit button.
3. The rest of the process is exactly like entering a New Contribution Form (refer to instructions above)

Upload a Contribution File

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	<input type="text"/>		
Work Start Date:	<input type="text" value="8/1/2016"/>	Work End Date:	<input type="text" value="8/31/2016"/>
Process Contribution:	<input type="text" value="Upload Contribution File"/>		
Contribution Type:	<input type="text" value="Regular Contribution"/>		
CBA:	<input type="text"/>		
* File Name:	<input type="text"/>		<input type="button" value="Browse..."/>
	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>	

- **Upload Contribution File** – option allows Employee Hours & Wages data to be uploaded directly into the system from a data file in CSV or TXT format. These files can normally be extracted from the Company's payroll system, this is very helpful when there are a large number of employees for whom fringe contributions are being reported.
- Select the **Work Start** and **Work End** dates. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the Payroll Start and Ending dates.
- Select the proper CBA, this will pull in the appropriate fringe rates
- Use the Browse Button to find the CSV or TXT file that you want to use

Upload a Contribution File

Whether you export from your payroll system or you use Excel to create spreadsheets with employee information, you need to save your file as a .CSV or .TXT file. Simply select “File,” “Save AS,” and choose .CSV or .TXT from the ‘Save as Type’ drop down list.

Below is the format that files need to be in to work with the upload process, the columns must be this exact order or you will get an error and not be able to upload the information. The Heading line (row 1; SSN, Workclass, First, etc.) cannot be in the file you try to upload, it would cause errors when uploading, the 1st row should contain 1st Employees info.

SSN	Work Classification	Last Name	First Name	Middle Name	Monthly Flat	Hours Worked
123456789	PENSION ONLY	DATA	TEST	C	1	100

- If data is incorrect you will get an error and the file will not be uploaded, you need to correct the file and make sure it is in the format mentioned on the prior page, and then try Uploading the file again.
- Once the .CSV or .TXT file has been successfully uploaded, you can proceed. The rest of the process is exactly like entering a New Contribution Form (refer to instructions above).

Copy/Modify Previous Report Form

Electronic Contribution

Select the contractor from the list to submit your contributions

Select Contractor:	<input type="text" value=""/>		
Work Start Date:	<input type="text" value="8/1/2016"/>	Work End Date:	<input type="text" value="8/31/2016"/>
Process Contribution:	<input type="text" value="Copy / Modify Previous Report Form"/>		
*Invoice Number:	<input type="text" value="Invoice Number CBA Work StartDate Work EndDate"/>		
<input type="checkbox"/> Check here to zero out hours and amounts from copied data			
<input type="button" value="Submit"/>		<input type="button" value="Cancel"/>	

- **Copy/Modify Previous Report Form** – option allows electronic Contribution Data previously input into the system to be pulled forward and re-used for the current month. It brings in the same Employees SSN and Name info based on the selected CBA, which makes it very beneficial when Contractor reports on the same employees every pay period.
- Select the **New Work Start** and **Work End Date**. If you are a monthly contractor, please use the first day and the last day of the month. If you are a weekly contractor, please use the Payroll Start and Ending dates.
- Select **Copy/Modify Previous Report Form** from the drop down box titled **Process Contribution**.
- From the **Invoice Number** drop down list, select the Invoice you would like to copy.
- Check the appropriate box to **zero out any information** from the copied data, this will zero hours & wages
- Press the **Submit** button.
- The rest of the process is exactly like entering a New Contribution Form (refer to instructions above).

How to View Past Contribution Forms

Home	Electronic Contribution	Contribution Payment	Employer Information	News
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View All Contributions

Select Contractor:
Begin Date: End Date:

- Select the Contractor Name from the drop down list. (Some contractors can have multiple contractor numbers to choose from based upon how your user ID is setup.)
- Press the Search button, and it will show a screen with all Past Contributions Forms for this Contractor

How to View Past Contribution Forms

View All Contributions

Select Contractor: Begin Date: End Date:

Invoice #	Wrk Date	Section Code	Section	No.Empl	Cont No.	Contractor	Amount	Status	Payment	Deposit Dt	Submitter	Trans. Dt	Del
CW16-00000071	08/31/2016	Plan A	Plan A	1	29845		\$12,810.00	Pending			DemoContractor	09/13/2016	<input type="checkbox"/>
CW16-00000070	08/31/2016	Plan A	Plan A	3	29845		\$2,637.00	Pending	ACH	09/14/2016	DemoContractor	09/12/2016	<input type="checkbox"/>
CW16-00000069	08/31/2016	Plan A	Plan A	3	29845		\$2,637.00	Pending	ACH	09/07/2016	DemoContractor	09/02/2016	<input type="checkbox"/>

- If you wish to Delete Invoices, you can only Deleted Invoices in “Pending” status, you need to click the box in the “Del” column to selected desired Invoices to be deleted, then press Delete Contribution button at the bottom of the page.
- To delete invoices that are in an “In Process” status, you need to contact the Fund Office.
- If status says “Paid,” your form and payment was received and entered into the Contribution System, these cannot be deleted.

How to Make Payments on Multiple Saved Forms

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Electronic Contribution', 'Contribution Payment', 'Employer Information', and 'News'. The 'Contribution Payment' menu is open, showing options: 'Make a Payment', 'View All Payment', 'Account Management', and 'Make Variance Payment'. Below the menu is a 'Pending Payment' section with a search form. The form includes a 'Select Contractor:' dropdown, an '* Invoice Begin Date:' dropdown set to '8/6/2016', an '* Invoice End Date:' dropdown set to '9/6/2016', and 'Search' and 'Clear' buttons.

The CBA provides that the Trust Funds' remittance reports and contributions are to be delivered to the Trust Funds by the last day of the month following the month in which the related hours were worked. Any failure of a contributing employer to provide such remittance reports and/or contributions by that date shall be deemed a "Delinquency". The delinquency shall be determined by the postmark date on the envelope containing a contributing employer's reports and contribution. Interest on delinquent contributions shall accrue at the rate of ten percent (10%) per annum from the Delinquency Date until payment is made in full. In addition, liquidated damages of twelve percent (12%) per annum will be assessed thirty days after the Delinquency Date.

- If you enter and save multiple invoices and have not processed a payment for them, you can process one payment for multiple invoices, whether by ACH or Check
- From the Contribution Payment dropdown menu choose Make a Payment

How to Make Payments on Multiple Saved Forms

Pending Payment

Payment Summary
(1) Invoice Selected
Total amount due: \$12,810.00

Select Contractor: Invoice Number:

* Invoice Begin Date: * Invoice End Date:

An employer is considered delinquent if both the contribution report and funds are not received by the 20th of the first month following when the work was performed. Interest is calculated at:
 2% of the principle amount owed from the delinquency date, if paid between 1st -15th of the second month following work.
 4% of the principle amount owed from the original delinquency date, if paid between 16th-last of the second month following work.
 6% of the principle amount owed from the original delinquency date, if paid between the 1st-15th of third month following work.
 10% of the principle amount owed from the original delinquency date if not paid after third 15 day period.

Pending Invoice:



<input checked="" type="checkbox"/>	Invoice #	Wrk Date	Section Code	Section	Cont No.	Amount	Submitted By	Trans. Date
<input checked="" type="checkbox"/>	CW16-00000071	08/31/2016	Plan A	Plan A	29845	\$12,810.00	DemoContractor	09/13/2016

- You will go to a Pending Payment screen which shows contribution forms that have not been finalized for payment.
- In the Select Contractor area you can enter “Invoice Begin” / “Invoice End Date” date range to narrow or widen your search for all unpaid contributions forms.
- Click on the Box all the way to the left of the Invoice # for the forms that you would like to pay. This will combine all forms into one payment amount and you can continue to make your payment through the normal payment process.

Questions/Concerns

For Training and Enrollment, please call us at (925) 398-7044 or Toll Free at (877) 893-1500, and ask to speak with someone from our Contributions Team.