

IUOE 542 Benefit Funds of Eastern PA and DE

Employer Remittance Portal

User Guide

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I. Registration Process

In order to begin participating in the online reporting process, a payroll representative from the Employer must register an account. Using a browser, such as Internet Explorer, Firefox, or Google Chrome (recommended), navigate to the Funds' Office website at www.iuoe542funds.com/contractors/remittance and follow the link to the online remittance report page. The IUOE 542 Employer Login Screen will appear.

To register your account for the first time, select the Register Now option from the Employer Login menu. The employer number is needed to begin registering and can be located on the monthly paper employer remittance reports that are submitted to the Funds' Office. If you do not know your employer number, you can contact the Funds' Office at (215) 542 – 8211 or email at employer.remittance@iuoe542funds.com.

IUOE 542 EMPLOYER LOGIN

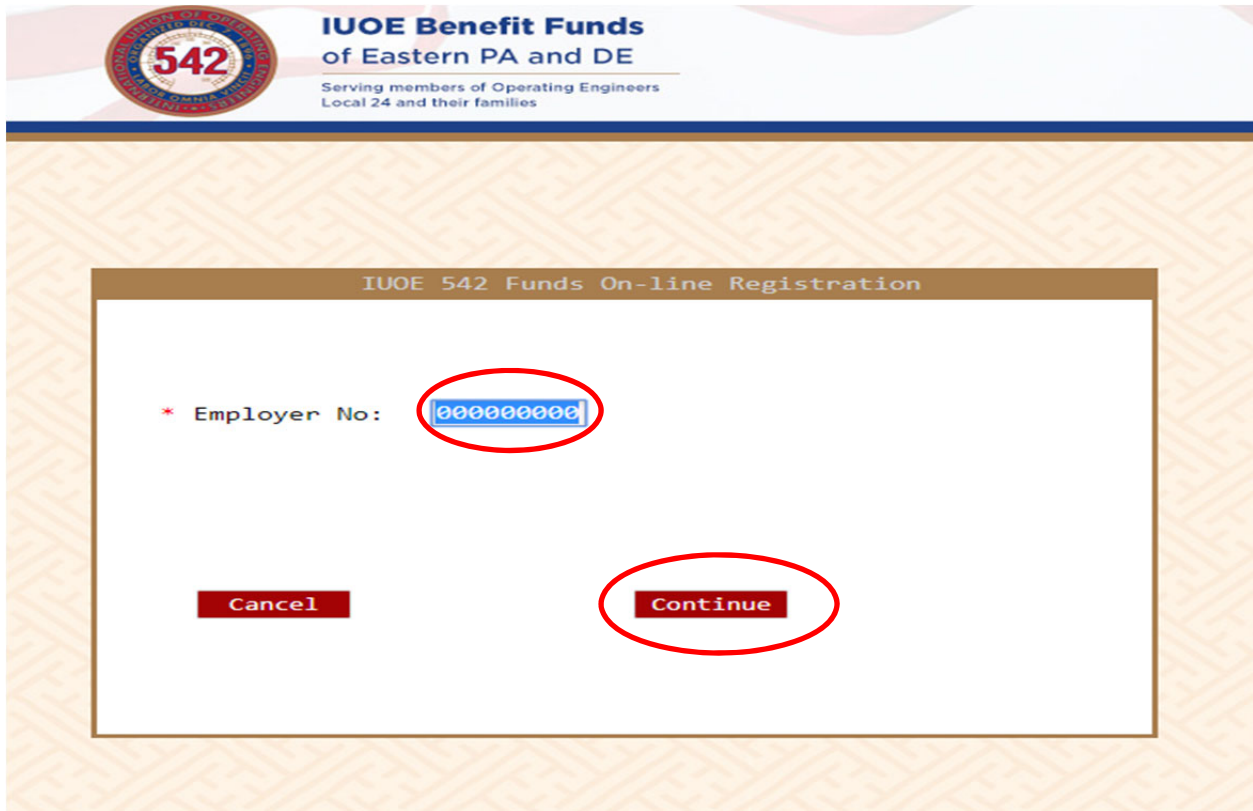
11/19/19
11:14:26

USER ID:

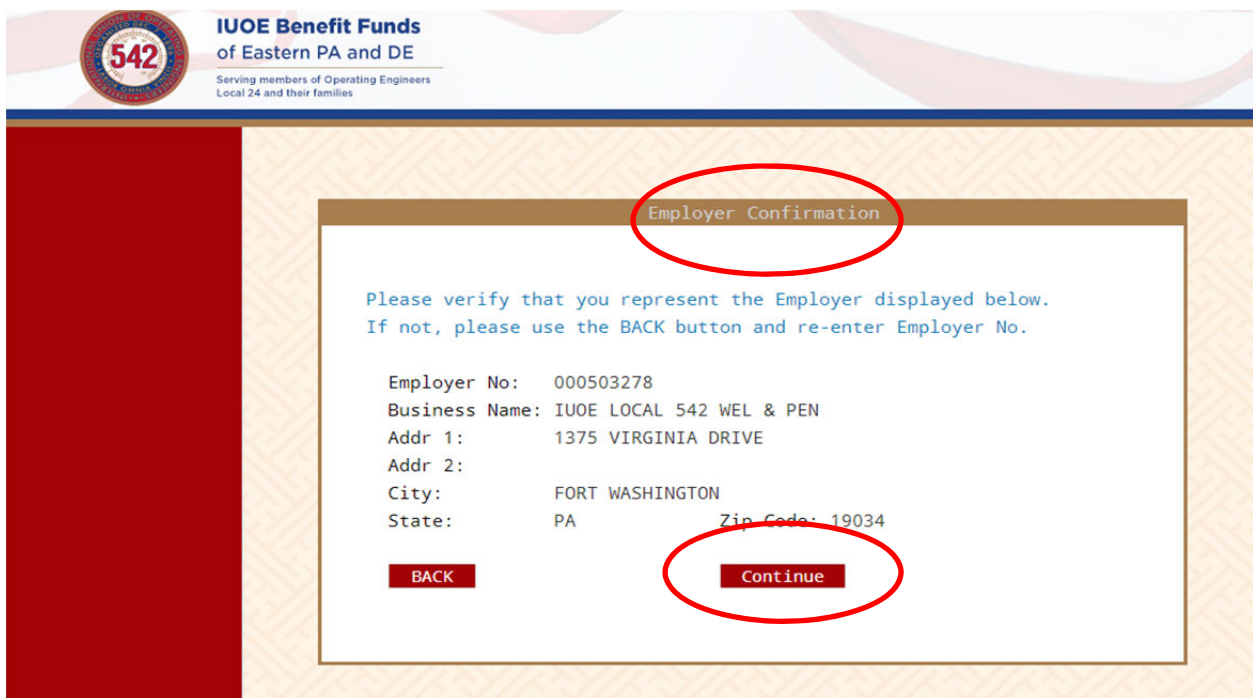
PASSWORD:

HINT: ENTER YOUR EMAIL ADDRESS AS YOUR USER ID.

[Continue](#) [Forgot Password?](#) [Register Now](#)



After the employer number is entered, select the Continue option. The Employer Confirmation screen will be displayed. This screen asks the user to confirm the employer number, name and address information. Select the Continue option to continue to the Employer Registration menu.



At the Employer Registration screen, the user is required to complete basic information that identifies the Employer with their online account. This includes the name of the responsible party that will be submitting the reports, their title, phone number and email address. At this screen you will also be prompted to create a unique password. When all of this information is entered in, select Confirm to complete the account registration process.

IUOE Benefit Funds
of Eastern PA and DE
Serving members of Operating Engineers
Local 24 and their families

Employer Registration

Employer No: 000503278
 Business Name: IUOE LOCAL 542 WEL & PEN
 Addr 1: 1375 VIRGINIA DRIVE
 Addr 2:
 City: FORT WASHINGTON
 State: PA Zip Code: 19034

NOTE: Please fill out the form below to create an on-line account with the IUOE 542 Benefit Funds Employer portal.

* Contact Name:
 * Title:
 * Bus Phone:
 * Email Addr:
 * Password:
 * Confirm PW:

Cancel Confirm

Once the online account is set up and confirmed, the user can then begin the process of submitting their electronic remittance reports online.

II. Employer Remittance Menu and Submitting a Report

The process of submitting an electronic remittance report begins in the Employer Remittance menu on the top left of the Welcome Screen. Upon selecting the Employer Remittance menu, a notification will then appear that states the employer is bound by the terms of the Collective Bargaining Agreement and Trust. Select the green Agree and Continue icon to continue on with the reporting process. If the Decline and Cancel option is selected, then the user is unable to proceed further.

The screenshot shows the IUOE 542 Benefit Funds of Eastern PA and DE website. The header includes the logo and text: "IUOE Benefit Funds of Eastern PA and DE, Serving members of Operating Engineers Local 24 and their families". A left sidebar contains navigation links: "Employer Remittance", "Remittance Archive", "Change Password", "Change Contact", "Contact Us", and "Logout". The "Employer Remittance" link is circled in red. The main content area displays the date "1/14/20", time "11:28:01", and the URL "myIUOE542.com". A welcome message reads: "Welcome: IUOE LOCAL 542 WEL & PEN". Below this, it says "Welcome to the IUOE 542 Benefit Funds Employer Web Portal". A list of actions is provided: "From this website you can:" followed by a bulleted list: "* Download Remittance Spreadsheet Templates.", "* Upload Remittance files in the Excel .xlsx format.", "* Download Remittance Summary and Detail Reports for review.", "* Process Remittance Reports", with sub-bullets for "* Pay OnLine" and "* Pay by Check", and "* Download Remittance Reports from History." At the bottom, it says "If you have any questions regarding this site, you can send an email to Charles Bumbaugh at the link below." and provides the email address "employer.remittance@iuoe542funds.com".

This screenshot shows the same IUOE 542 portal, but with a "COLLECTIVE BARGAINING AGREEMENT" dialog box open. The dialog box title is "COLLECTIVE BARGAINING AGREEMENT". It shows the date "1/14/20" and time "11:29:20". The text inside the dialog box reads: "The under signed Employer agrees to be bound by the terms and conditions of the existing Collective Bargaining Agreement and the Trust Agreement as presently constituted and has since been amended. The undersigned affirms that he/she is authorized to execute this document on behalf of the contributing Employer." At the bottom of the dialog box, there are two buttons: "Agree and Continue" (highlighted with a red circle) and "Decline and Cancel". The left sidebar from the previous screenshot is still visible on the left side of the page.

Once the user accepts the terms of the Collective Bargaining Agreement, they can begin the four step process of submitting their remittance report and making the payment. Step 01 of the process is to download a remittance template. All users must perform Step 01 before submitting their report because the template, as designed, is the only acceptable format (.xlsx) for submitting remittance reports to the Funds' Office. This Excel template replaces the paper remittance form document and will now serve as the report that will be uploaded each reporting period to the Funds' Office. When submitting an electronic remittance report through the portal, this template as designed **MUST** be used; the portal will not accept any other spreadsheet, excel file, word document, etc.

The screenshot shows the IUOE Benefit Funds portal interface. At the top left is the IUOE 542 logo. The header text reads "IUOE Benefit Funds of Eastern PA and DE" and "Serving members of Operating Engineers Local 24 and their families".

The main content area displays the following information:

- Date: 1/14/20
- Time: 11:29:56
- Employer: Employer Remittance
- Local: IUOE LOCAL 542 WEL & PEN
- Ref#: 000503278

The process steps are:

- Step 01:** DOWNLOAD a Remittance Template. A red circle highlights the "Download Template" button.
- Step 02:** UPLOAD Remittance Hours and Wages. Includes an "Upload Remittance" button, "Last POSTED Remittance Reporting Date: 12/31/19", and "Last UPLOAD Date and Time: 01/01/01 1:01:01". Below this are "Refresh Table", "Page Up", and "Page Down" buttons.

RPT DATE	TIME	REF#	HOURS	WAGES	STATUS
<input type="checkbox"/>	12/31/19	0	3822.25	153592.81	POSTED

Below the table, a message states: "Select one Pending batch at a time!".

- Step 03:** DOWNLOAD Pending Remittance Reports for review. Includes "Download Selected Report" and "Email Selected Report" buttons.
- Step 04:** PROCESS Pending Remittance Report. Includes "Process Selected Report", "Delete Selected Report", and "Return" buttons.

The following dialogue box appears and presents the user with two options. The first option allows the user to include employees from the prior remittance report. It is recommended that the user select "YES". The second option allows the user to sort the report by either Social Security Number or by last name.



DOWNLOAD TEMPLATE

Include Employees from prior Remittance Report: YES ▾

Sort Remittance Template by SS# or Last Name: LAST ▾

Continue Cancel

Upon selecting Continue the template will generate in the format prescribed by the user. When the template is generated, select "Display Template". This will automatically download an Excel spreadsheet document for you. This Excel spreadsheet is what you will be using each month to submit a remittance report.


TEMPLATE CREATED

Creating Remittance Template - Please Wait...

DOCUMENT CREATION COMPLETE...

Display Template

Process 99% complete ...

 **IUOE Benefit Funds**
of Eastern PA and DE
Serving members of Operating Engineers
Local 24 and their families

1/14/20 **Employer Remittance**
11:32:56 IUOE LOCAL 542 WEL & PEN 000503278

Step 01: DOWNLOAD a Remittance Template
Download Template

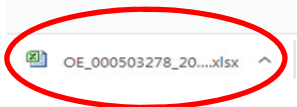
Step 02: UPLOAD Remittance Hours and Wages
Upload Remittance
Last POSTED Remittance Reporting Date: 12/31/19
Last UPLOAD Date and Time: 01/01/01 1:01:01
Refresh Table **Page Up** **Page Down**

RPT DATE	TIME	REF#	HOURS	WAGES	STATUS
12/31/19		0	3822.25	153592.81	POSTED

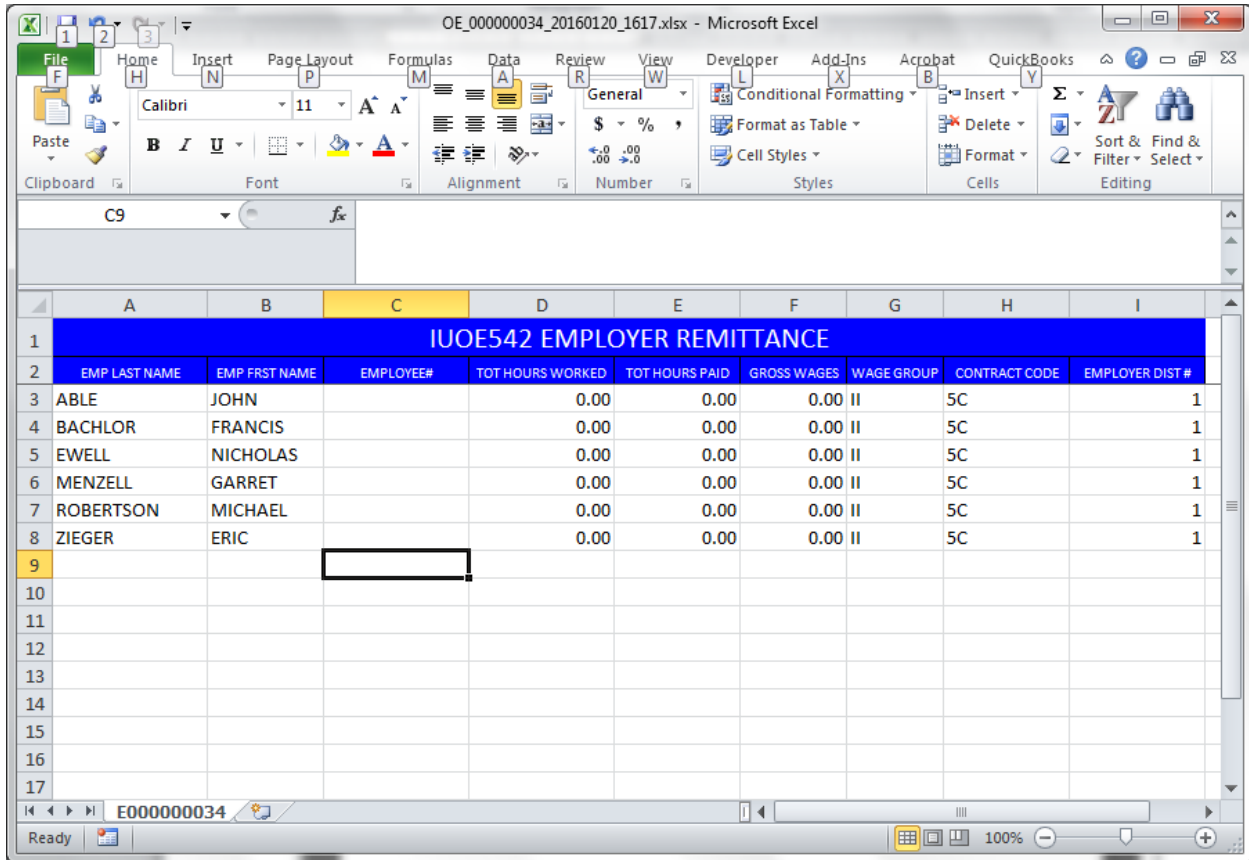
Select one Pending batch at a time!

Step 03: DOWNLOAD Pending Remittance Reports for review.
Download Selected Report
Email Selected Report

Step 04: PROCESS Pending Remittance Report.
Process Selected Report
Delete Selected Report
Return



When you open up the Excel spreadsheet it will look like the following:



Save this Excel spreadsheet to their local PC drive or network files. Note: you don't have to download a template each month that you are submitting a report. You only need to download the template once. Once a template spreadsheet has been downloaded, the current month's information is populated and the report is submitted, the spreadsheet can be opened up and saved as the next month's report. This way, the employees' names and social security numbers will not have to be reentered. Employees with no hours or wages in the current month can be removed from the spreadsheet and new employees can be added as necessary.

Also note: you cannot change any of the data in rows one and two.

Populate the downloaded template (Excel spreadsheet) for the month being reported, either manually or as an export from an existing payroll system that is then copied and pasted in to this spreadsheet. **Populate all columns with data for Employee Last Name, Employee First Name, Employee Social Security Number, Total Hours Worked, Total Hours Paid, Gross Wages, Wage Group, Contract Code, and Employer District #.** We recommend that you save your work frequently as you go, as to not lose any data that causes re-work.

The information that must be entered in to the spreadsheet is as follows:

Employee Last Name: Exclude any Jr., Sr., hyphens, apostrophes, etc.
Employee First Name
Employee #: Employee Social Security Number (with or without dashes)
Wage Group: I, II, III, IV, V, VI, VII(A), VII(B), APPR 1Y, APPR 2Y, APPR 3Y, APPR 4Y
Contract Code: 5C, 7C, 22C, 29C, 29CH, DHW, DBH
District: 1,2,3,4,5

STEP 02: UPLOAD Remittance Hours and Wages

After the spreadsheet is populated with the data and ready to be submitted, proceed to STEP 02 – UPLOAD Remittance. Using the Upload Remittance button, you are prompted to select a reporting date from the drop down menu to the right (always the last day of the month) and then choose the file to be uploaded (using the “Browse” button to find the spreadsheet on your desktop, PC or network files).

Reporting Date: 

Please choose a file:
 OE_000001080_20200103_1058.xlsx

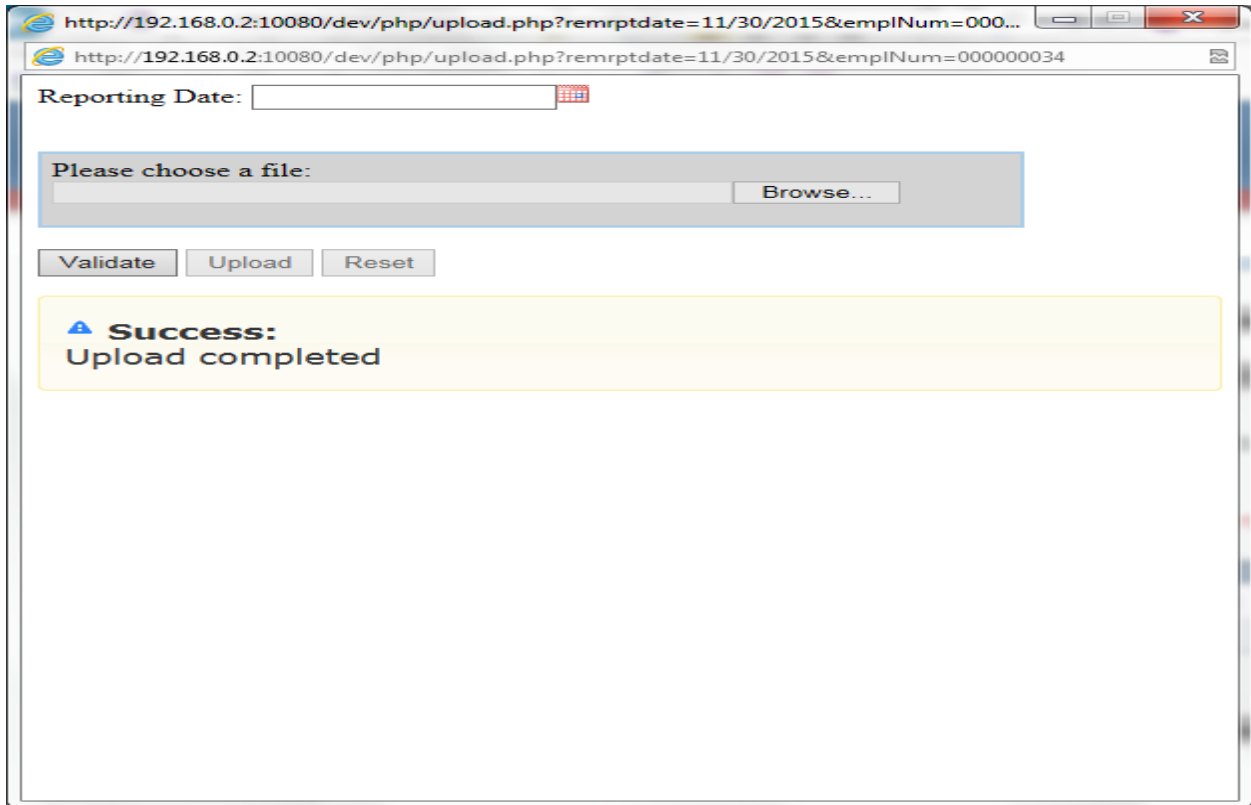
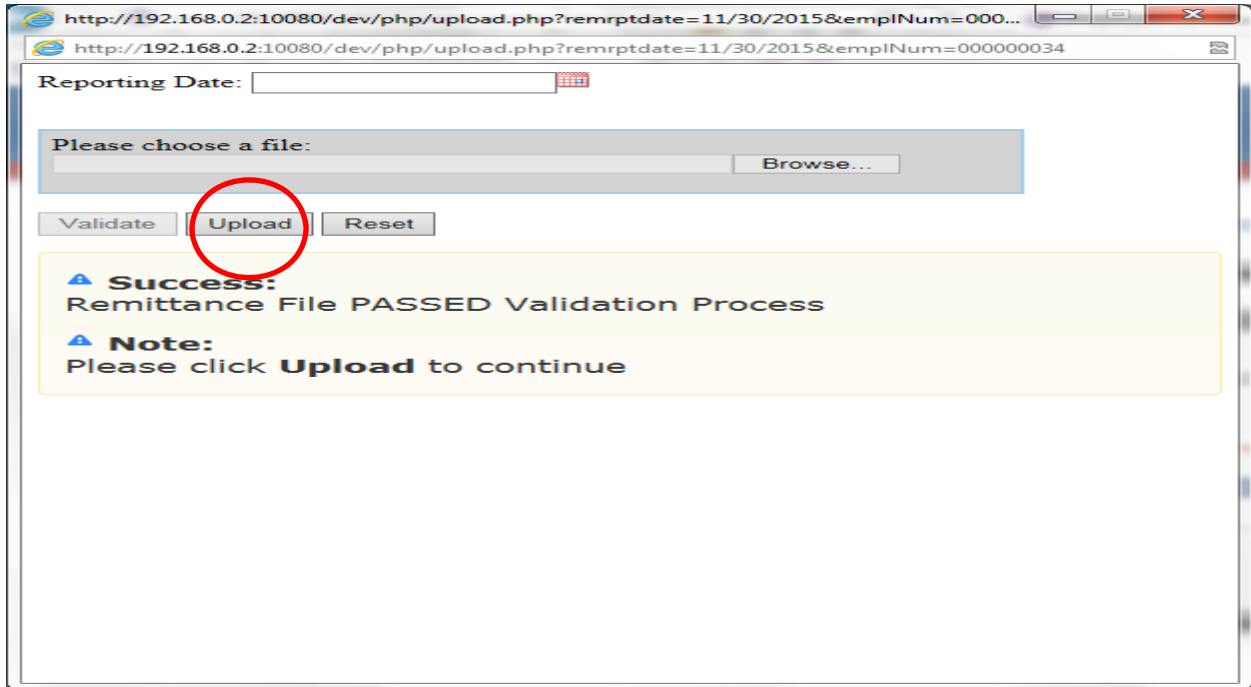
Once the file is selected and is shown in the 'Please choose a file" box, select the Validate option. If the validation process is NOT successful, the error messages will indicate the row in error and the type of error. Correct the errors in the spreadsheet, then retry the upload and validation process.

Reporting Date: 

Please choose a file:
 No file chosen

▲ Alert:
Row: 3 ERROR: Total Hours Worked > Total Hours Paid
Row: 3 ERROR: Invalid Wage Group
Row: 3 ERROR: Invalid Contract Code
Row: 4 ERROR: Invalid Wage Group
Row: 4 ERROR: Invalid Contract Code
Row: 5 ERROR: Invalid Wage Group
Row: 5 ERROR: Invalid Contract Code
Remittance File FAILED Validation Process

Once the VALIDATION process is successful, the user can select the 'UPLOAD' button and the spreadsheet will be transferred to the IUOE Benefit Funds system. The user is notified when the Upload is completed.



After the upload is completed, the file has been transmitted to the Funds' Office internal participant data system. The user can now close out of the dialogue box and return to the main Employer Remittance Screen. On the Employer Remittance Screen the user will see a table that shows the report date and time, hours, wages, and status. The report that was just uploaded will show as Pending until an employee at the Funds' Office reviews and verifies the report, thus changing the report's status to Posted. The user is now ready to review the completed remittance report. Note: if the Pending report is not displayed, select Refresh Table.

III. Reviewing Submitted Remittance Reports

At this stage of the process, the employer's remittance report has been uploaded to the Portal and the Funds' Office has electronically received the participants' hours and wages. The final step is to review the information one last time before the invoice for fringe benefits, union dues check-off and Industry Advancement Fund (if applicable) is automatically calculated and generated in order to make the payment. Note: By using the Portal there is no longer the need to manually calculate these payments.

To review the information that was uploaded to the Portal and to review the amounts due, complete **Step 03: Download Pending Remittance Reports for review**. To the left of the most recently uploaded (Pending) file, there will be a gray box to the left of the Report Date. Place your mouse over the gray box and select Download Selected Report under Step 03. Please select only one report at a time. Downloading the selected report will open up both a Remittance Summary and Remittance Detail PDF document. The email selected report will email the user a copy of the PDF summary and detail reports. The Remittance Summary and Remittance Detail reports are discussed more in further detail.

It is important to note that the way the invoice is calculated is based on whether or not the Employer pays in to the Industry Advancement Fund (See the Collective Bargaining Agreement for additional information on who pays into the Industry Advancement Fund). After the Download Pending Remittance Reports for review is selected, the user is prompted to answer the question as to whether or not they will be including payment to the Industry Advancement Fund on the invoice. From the drop-down menu select Yes or No to proceed.

 **IUOE Benefit Funds**
of Eastern PA and DE
Serving members of Operating Engineers
Local 24 and their families

1/06/20 **Employer Remittance** 000503278
09:35:57 **IUOE LOCAL 542 WEL & PEN**

Step 01: DOWNLOAD a Remittance Template
Download Template


Step 02: UPLOAD Remittance Hours and Wages
Upload Remittance
Last POSTED Remittance Reporting Date: 11/30/19
Last UPLOAD Date and Time: 01/06/20 9:35:52
Refresh Table **Page Up** **Page Down**

RPT DATE	TIME	REF#	HOURS	WAGES	STATUS
<input checked="" type="checkbox"/> 12/31/19	9:34	1354	128.00	10380.62	PENDING
<input type="checkbox"/> 11/30/19		0	942.00	36910.92	POSTED

Select one Pending batch at a time!

Step 03: DOWNLOAD Pending Remittance Reports for review.
Download Selected Report
Email Selected Report

Step 04: PROCESS Pending Remittance Report.
Process Selected Report
Delete Selected Report
Return

 **IUOE Benefit Funds**
of Eastern PA and DE
Serving members of Operating Engineers
Local 24 and their families

1/06/20 **Employer Remittance** 000503278
09:35:57 **IUOE LOCAL 542 WEL & PEN**

Step 01: DOWNLOAD a Remittance Template

INDUSTRY ADVANCEMENT FUND

Create Remittance Detail and Summary Report

Include Industry Advancement Fund Payment on Remittance Summary Report? NO ▾

Continue **Cancel**

Return

Once the Continue Option is selected, the Portal will automatically generate and display both a Remittance Summary and Remittance Detail in Adobe PDF format. The Remittance Summary shows the amounts that are owed to the Benefit Funds, amounts owed to the Union for dues check off, and amounts due to Industry Advancement Fund (if applicable). The Remittance Summary will be submitted with a copy of the checks payable to the Funds Office and the Union. Please also download a copy for your records or select the Email Selected Report option under Step 03 to have the PDF documents sent directly to your email that is on file. **Note: Before both PDF reports become available you may have to disable your computer's pop up blocker. Select "always allow" pop ups to prevent this from happening in the future.**



Examples of both the Remittance Summary and Remittance Detail reports are shown below:

**International Union of Operating Engineers of
Eastern Pennsylvania and Delaware Benefit Plans**

1375 VIRGINIA DRIVE
SUITE 102
FORT WASHINGTON, PA 19034

Remittance Summary

MAILING ADDRESS
P.O. BOX 1477
FORT WASHINGTON, PA 19034
PHONE: (610) 612-6211

Report Date: 12/31/19

ITEM	DESCRIPTION	WAGES	HOURS	RATE	AMOUNT
01	Joint Benefit Fund Contribution	10,380.62		.295	3,062.28
02	Surcharges				
	Welfare		140.00		1,082.20
	SUB		140.00		25.20
	Total Surcharges				1,107.40
03	Annuity		128.00		1,024.00
04	Pinpoint		140.00	1.000	140.00
	Grand Total Benefit Funds				5,333.68
	* Check Payable To: "I.U.O.E. Benefit Funds"				
05	Union Dues Check-off	10,380.62		.039	404.84
	* Check Payable To: "I.U.O.E. Local 542"				

JOHN SMITH, PAYROLL
IUOE LOCAL 542 WEL & PEN

1375 VIRGINIA DRIVE
FORT WASHINGTON, PA 19034

Signed By: _____
Title: _____
Date: _____

Employer #: 000503278

Reference#: 0000001354

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**International Union of Operating Engineers of
Eastern Pennsylvania and Delaware Benefit Plans
Remittance Detail**

1375 VIRGINIA DRIVE
SUITE 102
FORT WASHINGTON, PA 19034

MAILING ADDRESS
P.O. BOX 1477
FORT WASHINGTON, PA 19034
PHONE: (215) 942-8211

Employer: DAVE COCHRAN, PRES
CLEARWATER CONSTRUCTION INC.

Page: 1
Report Date: 12/31/19
Employer #: 000503278
Reference#: 0000001354

1375 VIRGINIA DRIVE
FORT WASHINGTON PA 19034

Employee Name	Social Security #	Hours Worked	Hours Paid	Gross Wages	Wage Group	Contr. Code	Dist. Code	Well/Apt Rate	Well/Apt Amount	SUB Rate	SUB Amount	Annuity Rate	Annuity Amount
OPERATOR 1	123-45-6789	40.00	40.00	3745.18	I	5C	1	7.730	309.20	.180	7.20	6.000	320.00
OPERATOR 2	123-45-6789	40.00	52.00	2239.22	I	5C	1	7.730	401.96	.180	9.36	6.000	320.00
OPERATOR 3	123-45-6789	46.00	46.00	4396.22	I	5C	1	7.730	371.04	.180	8.64	6.000	364.00
TOTALS:		126.00	140.00	10,380.62					1082.20		25.20		1024.00

www.IUOE542funds.com

IV. Processing Remittance Reports and Payments

The final stage in processing an employer remittance report is to submit an electronic (ACH) payment based on the invoice that is generated from the upload at Step 03. At this point the user is ready to make payment at **Step 04: Process Pending Remittance Report**. To the left of the current (Pending) file, there will be a gray box to the left of the Report Date. Place your mouse over the gray box and select Download Selected Report under Step 04. Please select only one report at a time.

1/06/20
09:35:57

Employer Remittance
IUOE LOCAL 542 WEL & PEN 000503278

Step 01: DOWNLOAD a Remittance Template
Download Template

Step 02: UPLOAD Remittance Hours and Wages
Upload Remittance
Last POSTED Remittance Reporting Date: 11/30/19
Last UPLOAD Date and Time: 01/06/20 9:35:52
Refresh Table **Page Up** **Page Down**

RPT DATE	TIME	REF#	HOURS	WAGES	STATUS
<input checked="" type="checkbox"/> 12/31/19	9:34	1354	128.00	10380.62	PENDING
<input type="checkbox"/> 11/30/19		0	942.00	36910.92	POSTED

Select one Pending batch at a time!

Step 03: DOWNLOAD Pending Remittance Reports for review.
Download Selected Report
Email Selected Report

Step 04: PROCESS Pending Remittance Report.
Process Selected Report
Delete Selected Report
Return

After report is selected for processing, the user is again prompted to answer the question as to whether or not they will be including payment to the Industry Advancement Fund on the invoice. From the drop-down menu select Yes or No to proceed.

When the user chooses Process Selected Report, an Employer Online Remittance Payment screen shows up on the screen that asks the user to confirm the amounts payable to the Benefit Funds, the Union, and the Industry Advancement Fund (if applicable) for accuracy. If the user agrees with the calculated payment amounts, proceed with Pay Online or Pay by Check. If the user disagrees with the amounts, they have the option of deleting the pending report under Step 04 and then re-submitting a corrected report.

Employer On-Line Remittance Payment

Employer No: 000503278
Business Name: IUOE LOCAL 542 WEL & PEN
Addr 1: 1375 VIRGINIA DRIVE
Addr 2:
City: FORT WASHINGTON
State: PA Zip Code: 19034
Email Addr: john.smith@iuoe542funds.com
Batch Ref#: 0000001354

Confirm payment amounts below...

Benefit Funds:	5333.68
Union Dues Check-Off:	404.84
Industry Advancement Fund:	.00

Pay On-Line --> to continue to the secure Payment Portal.

Pay by Check --> to submit Remittance Report with Checks.

Cancel

When Pay Online is chosen, a new window opens up stating the amount that will be deducted from the bank account. The user will have to enter in the bank account number and routing number. Once the banking information is entered in then the red Pay Now button at the bottom of the screen is selected so the payment can be processed.

Address

1375 Virginia Drive, Suite 102 Ft. Washington, PA 19034



IUOE Benefit Funds of Eastern PA and DE

Serving members of Operating Engineers Local 542 and their families

IUOE Local 542 Wel & Pen (000503278)
john.smith@iuoe542funds.com

Benefits Funds:	\$5,333.68
Union Dues Check-off:	\$404.84
Total Amount Due:	\$5,378.52

You can pay \$5,738.52 via secure ACH transfer from your bank account.

Account Info

Account Number (numbers only)

Routing Number (numbers only)

Account Type

[Privacy - Terms](#)

After the payment is made a confirmation page will be displayed confirming that the payments were successfully made. A copy of this should be printed out and kept in with the employer's records.

Address

1375 Virginia Drive, Suite 102 Ft. Washington, PA 19034



Remittance Summary

IUOE Benefit Funds of Eastern PA and DE

Serving members of Operating Engineers Local 542 and their families

Your payment of \$5333.68 for Benefits Fund was transmitted successfully (confirmation/reference #: 0003649013881)

Your payment of \$404.84 for Union Dues Checkoff was transmitted successfully (confirmation/reference #: 0003649013882)

IUOE Local 542 Wel & Pen (000503278)
john.smith@iuoe542funds.com

Benefits Funds:	\$5,333.68
Union Dues Check-off:	\$ 404.84
Total Amount Due:	\$5,738.52



IUOE Benefit Funds of Eastern PA and DE

Privacy - Terms

Note: Although there is an option to pay via ACH or by check for fringe benefits and union dues check-off, Industry Advancement Fund payments **MUST** be made by check and **MUST** be mailed to the Funds' Office.