

IUOE 542 Benefit Funds of Eastern PA and DE

Employer Remittance Portal

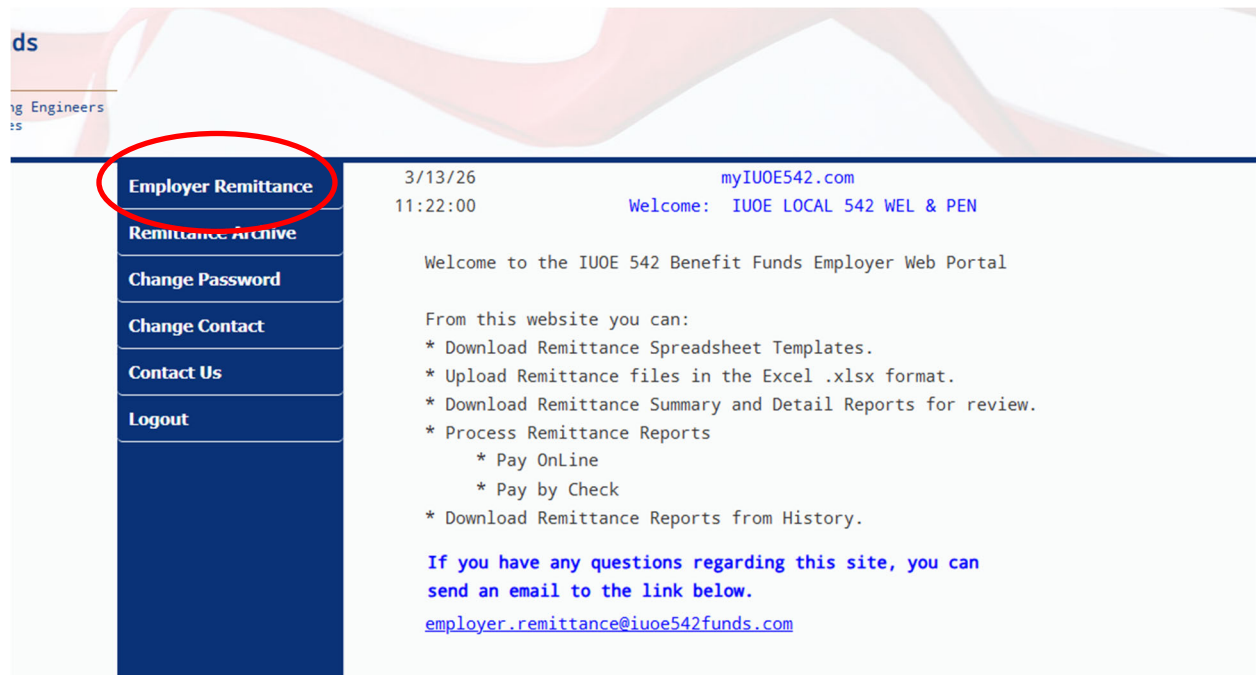
User Guide

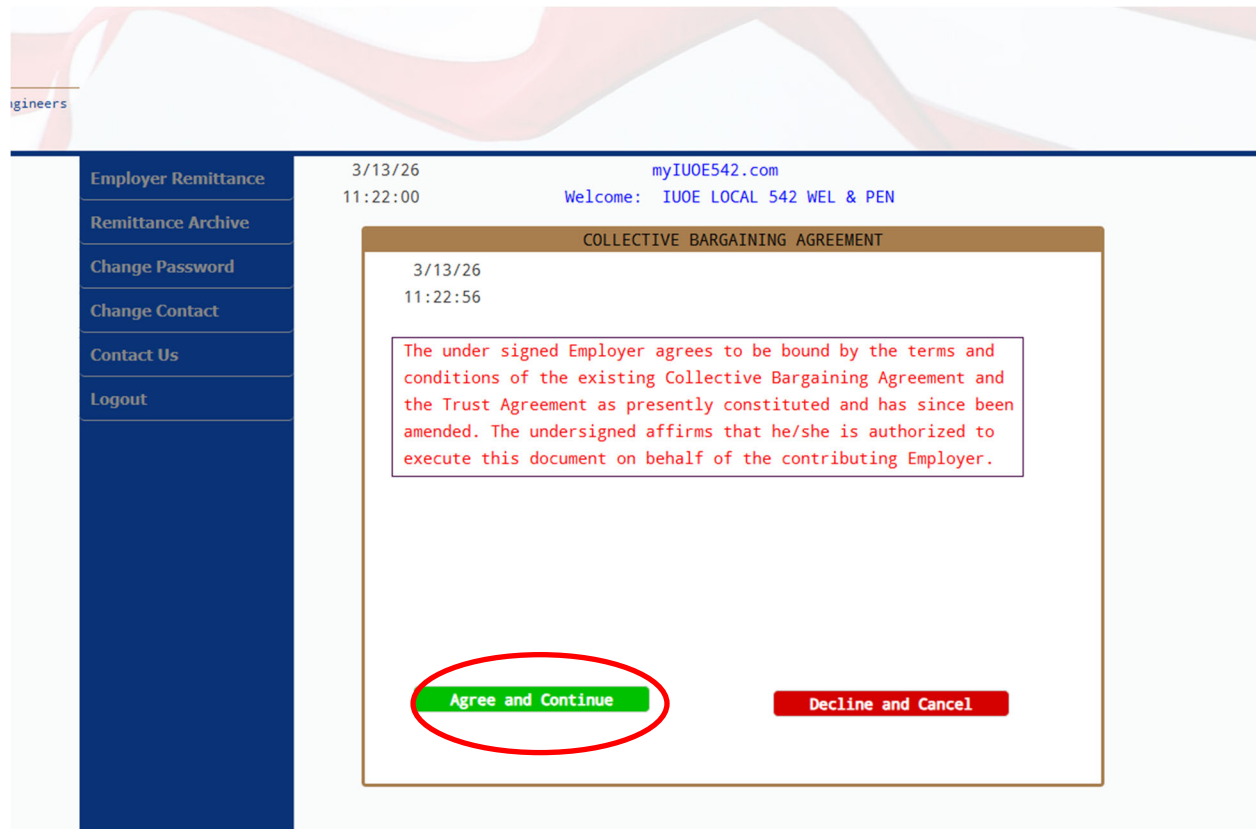
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I. Employer Remittance Menu and Submitting a Report

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 appears stating 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.





Once the user accepts the terms of the Collective Bargaining Agreement, they can then begin the steps necessary for preparing and submitting the remittance report and making payment for fringe benefits. There are four steps in the process that must be performed by first-time users in order to ensure the Funds’ office receives your monthly report and payment for fringe benefits.

Step 01 – Download 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 through the website. 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 website, this template as designed **MUST** be used; the portal will not accept any other spreadsheet, excel file, word document, etc.

ds
g Engineers
15

3/13/26 **Employer Remittance**
11:23:17 IUOE LOCAL 542 WEL & PEN 000503278

Step 01: DOWNLOAD a Remittance Template
Download Template **Email Remittance .pdf**

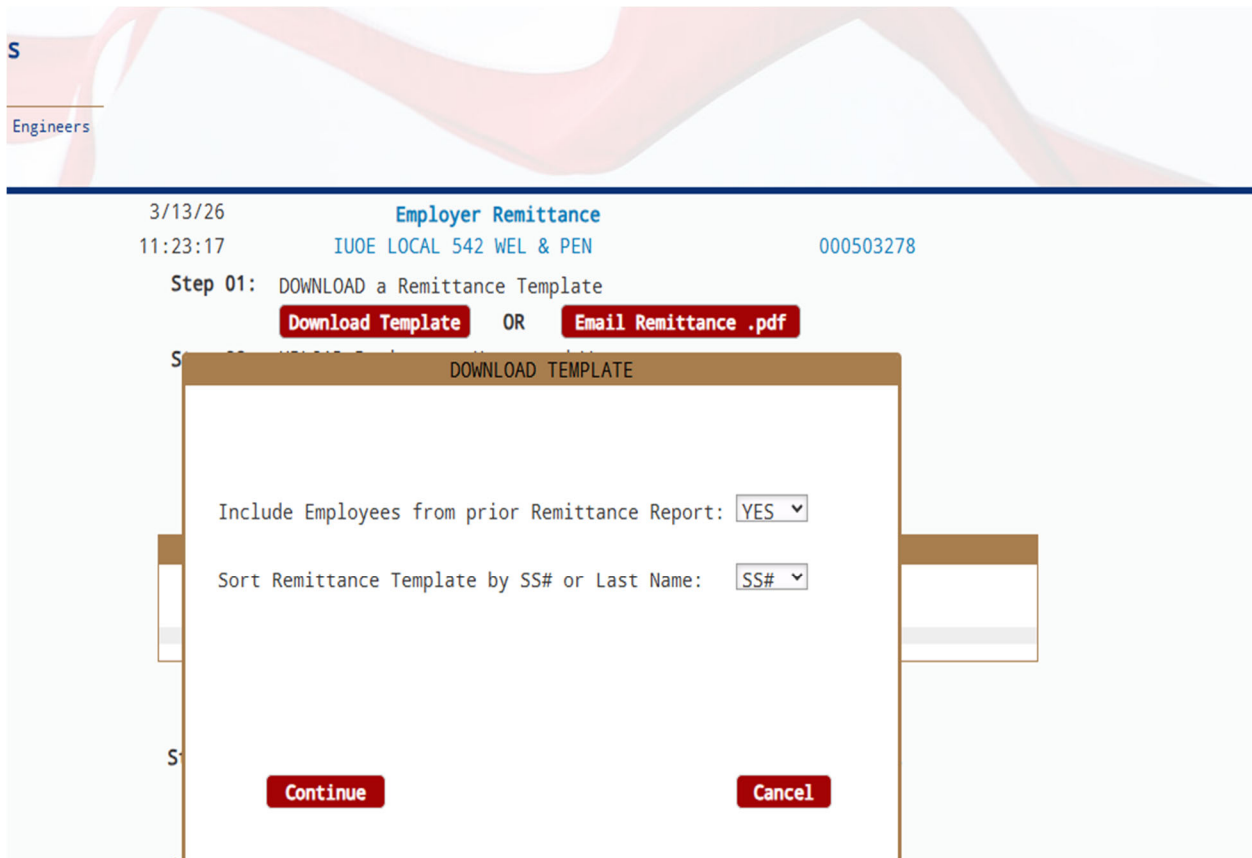
Step 02: UPLOAD Remittance Hours and Wages
Upload Remittance **NO WORK Remittance**
Last POSTED Remittance Reporting Date: 02/28/26
Last UPLOAD Date and Time: 01/01/01 1:01:01
Refresh Table **Page Up** **Page Down**

	RPT DATE	TIME	REF#	HOURS	WAGES	STATUS
<input type="checkbox"/>	2/28/26		0	3360.00	174487.56	POSTED

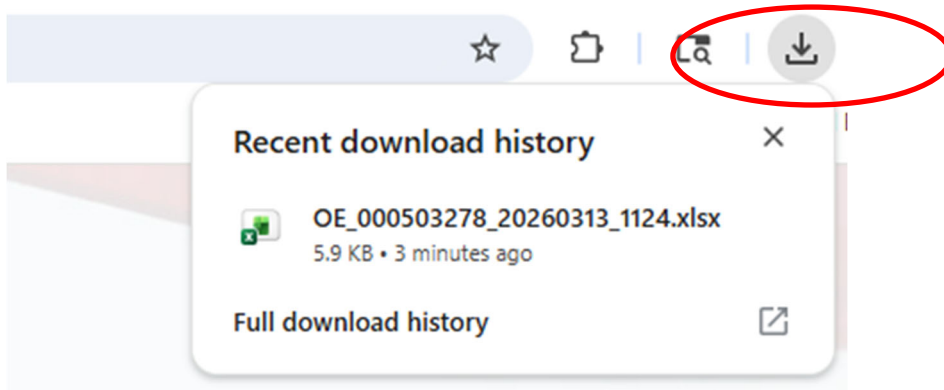
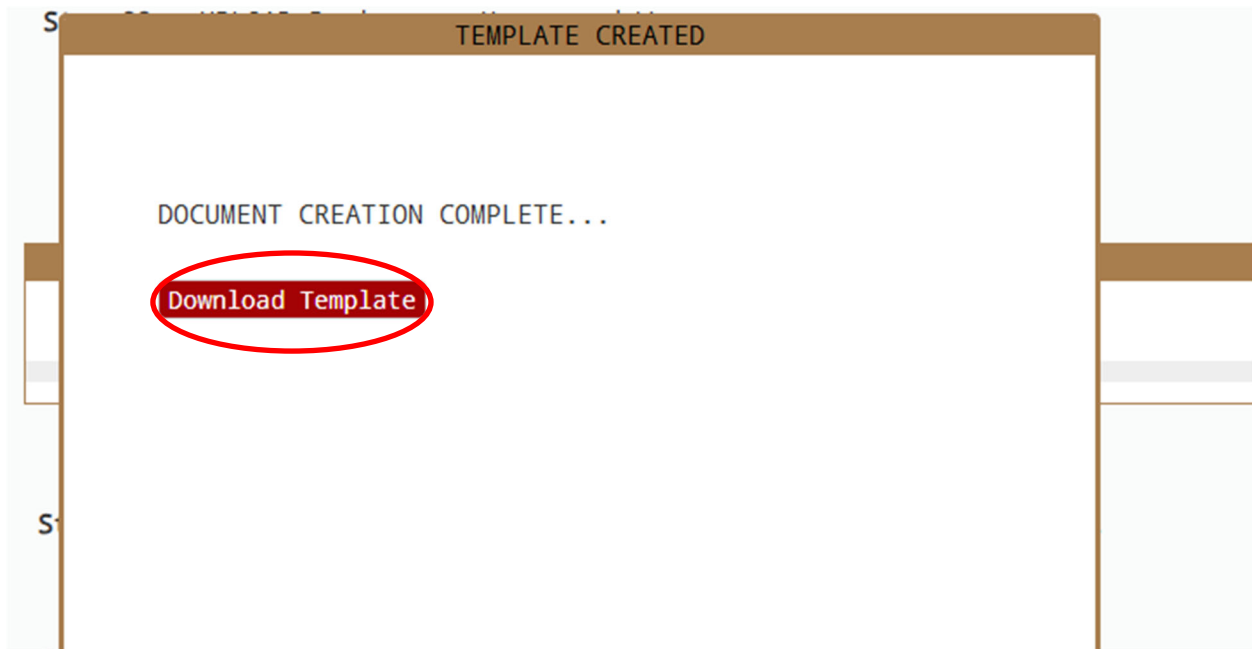
Step 03: Select PENDING Remittance Report, then click EMAIL button.
Select one Pending batch at a time!
Email Selected Report

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

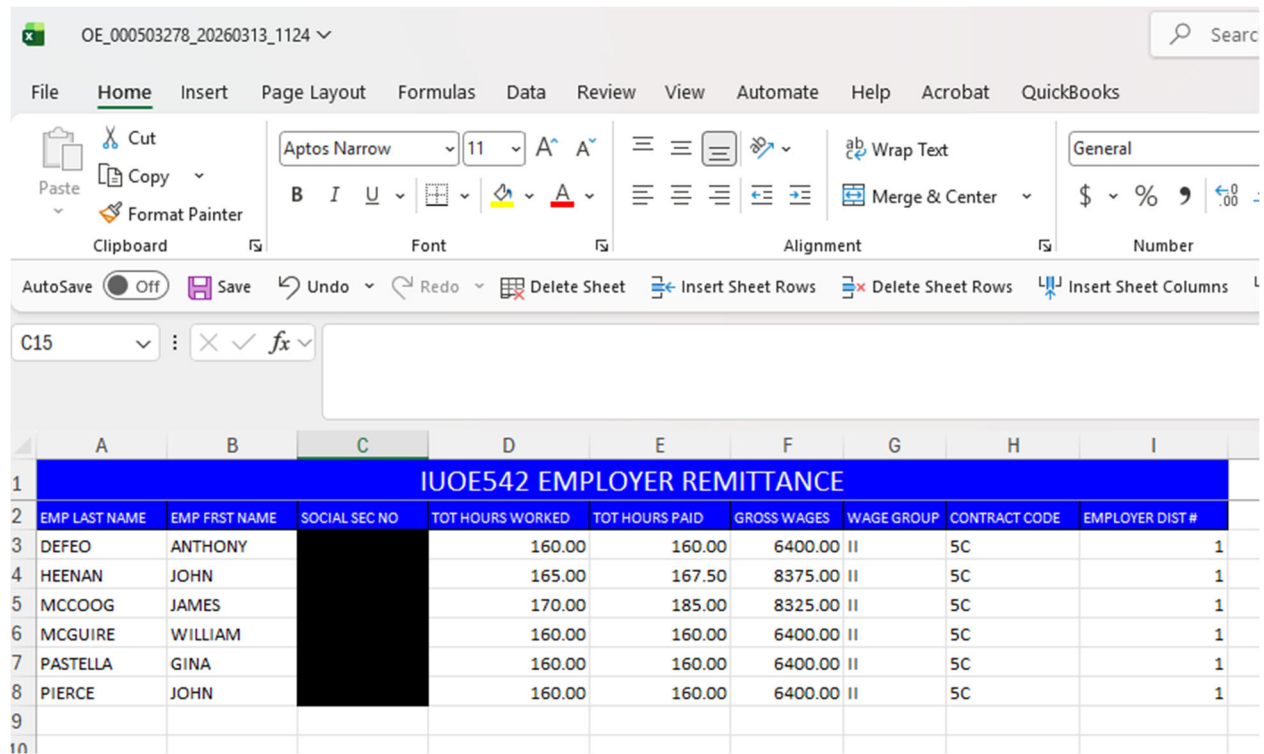
The following dialogue box appears and presents the user with two options. The first option allows the user to include employees from the prior remittance report. It is recommended that the user select "YES". The second option allows the user to sort the report by either Social Security Number or by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



Upon selecting Continue the template will generate in the format requested 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.



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, apostrophies, etc.
Employee First Name
Social Sec. Number
Wage Group: I, II, III, IV, V, VI, VII(A), VII(B), APPR 1Y, APPR 2Y, APPR 3Y, APPR 4Y
Contract Code: 5C, 29CB, 29C, 29CH, DHW, DBH
District: 1,2,3,4,5

Step 02: UPLOAD Remittance Hours and Wages

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_000503278_20260313_1124.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.

File converted to CSV successfully.

Reporting Date: 

Please choose a file:
 No file chosen

▲ Success:
Remittance File PASSED Validation Process

▲ Note:
Please click **Upload** to continue

Reporting Date: 

Please choose a file:
 No file chosen

▲ Success:
Upload 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.

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 next step is to review the information for accuracy and retain the remittance report for your records before submitting payment. Note: The portal calculates the amounts owed for fringe benefits, union dues, and Industry Advancement (if applicable). There is no need to manually calculate these payments.


II. Completed Remittance Reports

Step 03: Email Selected Report

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.

To the left of the most recently uploaded (Pending) file, there will be a gray box beside the Report Date. Place your mouse over the gray box and select Email Selected Report. Please select only one report at a time. Emailing the selected report will provide you with both a Remittance Summary and Remittance Detail PDF documents. The email selected report will

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 Email Selected Report is chosen, 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 542 and their families

2/13/26
IUOE LOCAL 542 WEL & PEN

Employer Re 000503278
IUOE LOCAL 542 WI 000503278

Step 01: DOWNLOAD a Remittance Template
Download Template OR **Email Remittance .pdf**

Step 02: UPLOAD Remittance Hours and Wages
Upload Remittance **NO WORK Remittance**
Last POSTED Remittance Reporting Date: 02/28/26
Last UPLOAD Date and Time: 03/13/26 12:00:16
Refresh Table **Page Up** **Page Down**

RPT DATE	TIME	REF#	HOURS	WAGES	STATUS	
<input checked="" type="checkbox"/>	3/31/26	12:00	13889	975.00	42300.00	PENDING
<input type="checkbox"/>	2/28/26		0	3360.00	174487.56	POSTED

Step 03: Select PENDING Remittance Report, then click EMAIL button.
Select one Pending Batch at a time!
Email Selected Report

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

3/13/26
12:00:20

Employer Remittance
IUOE LOCAL 542 WEL & PEN 000503278

Step 01: DOWNLOAD a Remittance Template

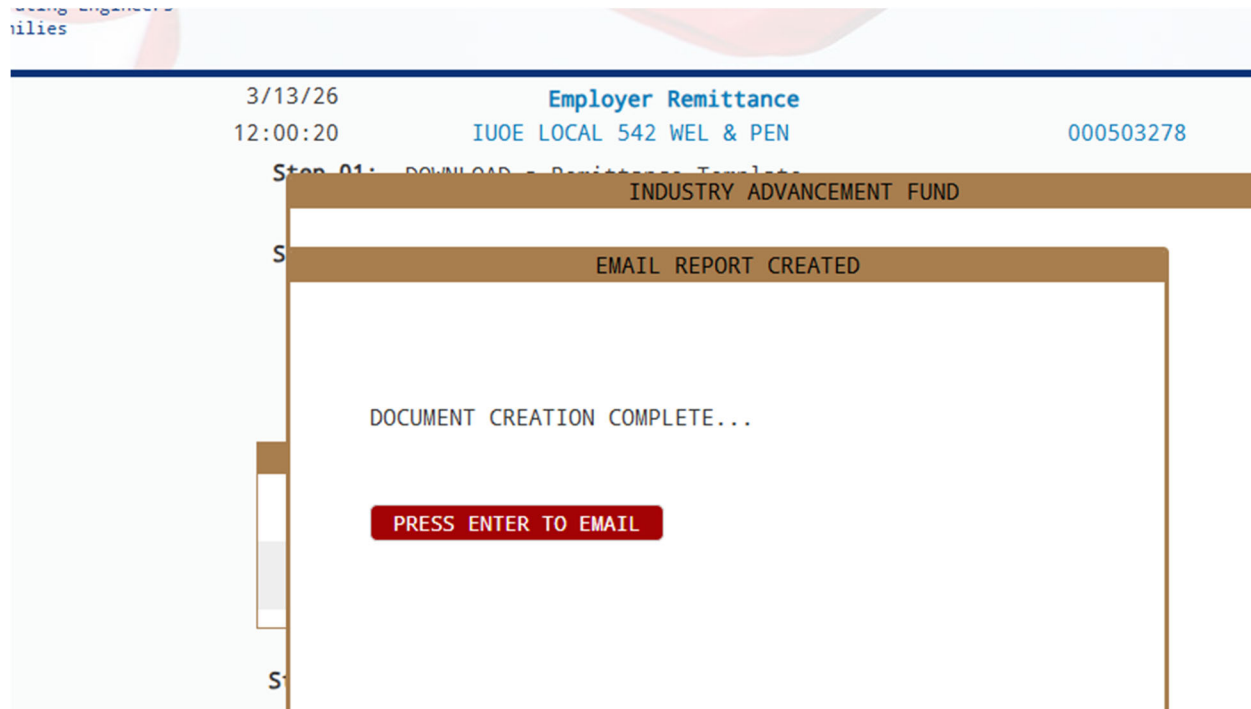
INDUSTRY ADVANCEMENT FUND

Create Remittance Detail and Summary Report

Include Industry Advancement Fund Payment on Remittance Summary Report?

Continue **Cancel**

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.**



An example of 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: (215) 542-8211

Report Date: 03/31/26

ITEM	DESCRIPTION	WAGES	HOURS	RATE	AMOUNT
01	Joint Benefit Fund Contribution	42,300.00		.125	5,287.51
01a	Welfare Total - Member Count	6		2,190.00	13,140.00
03	Annuity		975.00		9,262.50
04	Pinpoint		992.50		
	Grand Total Benefit Funds				27,690.01
	* Check Payable To: "I.U.O.E. Benefit Funds"				
05	Union Dues Check-off	42,300.00		.039	1,649.70
	* Check Payable To: "I.U.O.E. Local 542"				

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


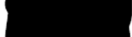
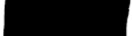

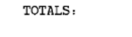

1375 VIRGINIA DRIVE
SUITE 102
FORT WASHINGTON, PA 19034

Remittance Detail

MAILING ADDRESS
P.O. BOX 1477
FORT WASHINGTON, PA 19034
PHONE: (215) 542-8211

Employer: JOHN SMITH
IUOE LOCAL 542 WEL & PEN
SUITE 102
1375 VIRGINIA DRIVE
FORT WASHINGTON PA 19030000

Page: 1
Report Date: 03/31/26
Employer #: 000503278
Reference#: 0000013889

Employee Name	Social Security #	Hours Worked	Hours Paid	Gross Wages	Wage Group	Contr. Code	Dist. Code	Wel/Apt Rate	Wel/Apt Amount	SUB Rate	SUB Amount	Annuity Rate	Annuity Amount
DEFEO, ANTHONY		160.00	160.00	6400.00	II	5C	1	2190.00	2190.00	2.000	320.00	9.500	1520.00
HEENAN, JOHN		165.00	167.50	8375.00	II	5C	1	2190.00	2190.00	2.000	335.00	9.500	1567.50
MCCOOG, JAMES		160.00	160.00	6400.00	II	5C	1	2190.00	2190.00	2.000	320.00	9.500	1520.00
MCCUIRE, WILLIAM		170.00	185.00	8325.00	II	5C	1	2190.00	2190.00	2.000	370.00	9.500	1615.00
PASTELLA, GINA		160.00	160.00	6400.00	II	5C	1	2190.00	2190.00	2.000	320.00	9.500	1520.00
PIERCE, JOHN		160.00	160.00	6400.00	II	5C	1	2190.00	2190.00	2.000	320.00	9.500	1520.00
TOTALS:		975.00	992.50	42,300.00					13140.00		1985.00		9262.50

III. Submitting Payment

Step 04: Process Pending Remittance Report

The final step is to submit the payment based on the options selected. Go back to the Pending report and check the box (see Step 03). You'll once again be asked whether or not in to include Industry Advancement 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 asks the user to confirm the amounts payable to the Benefit Funds, the Union, and the Industry Advancement Fund (if applicable). Proceed with Pay Online or Pay by Check.

When the Pay Online option 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, routing number, and type of account.

Once payment is made, the user will receive a confirmation page will be displayed showing that a payment was made. Please print and maintain a copy for your records.

Note: Industry Advancement must be made by check only.

Note: If payment is made via ACH, the confirmation does not automatically guarantee successful payment. Please allow up to 48 business hours for the payment to show up on the user's bank account activity.



IUOE Benefit Funds
of Eastern PA and DE

Serving members of Operating Engineers
Local 542 and their families

3/13/26 **Employer Remittance**
12:01:36 IUOE LOCAL 542 WEL & PEN 000503278

Step 01: DOWNLOAD Business Template

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: beth.martin@iuoe542funds.com
Batch Ref#: 0000013889

[Confirm payment amounts below...](#)

Benefit Funds:	27690.00
Union Dues Check-Off:	1649.70
Industry Advancement Fund:	.00

Pay On-Line --> to continue to the secure Payment Portal.
Pay by C-Card --> to pay by Credit Card via Payment Portal.
Pay by Check --> to submit Remittance Report with Checks.
Cancel