Contribution Management Service

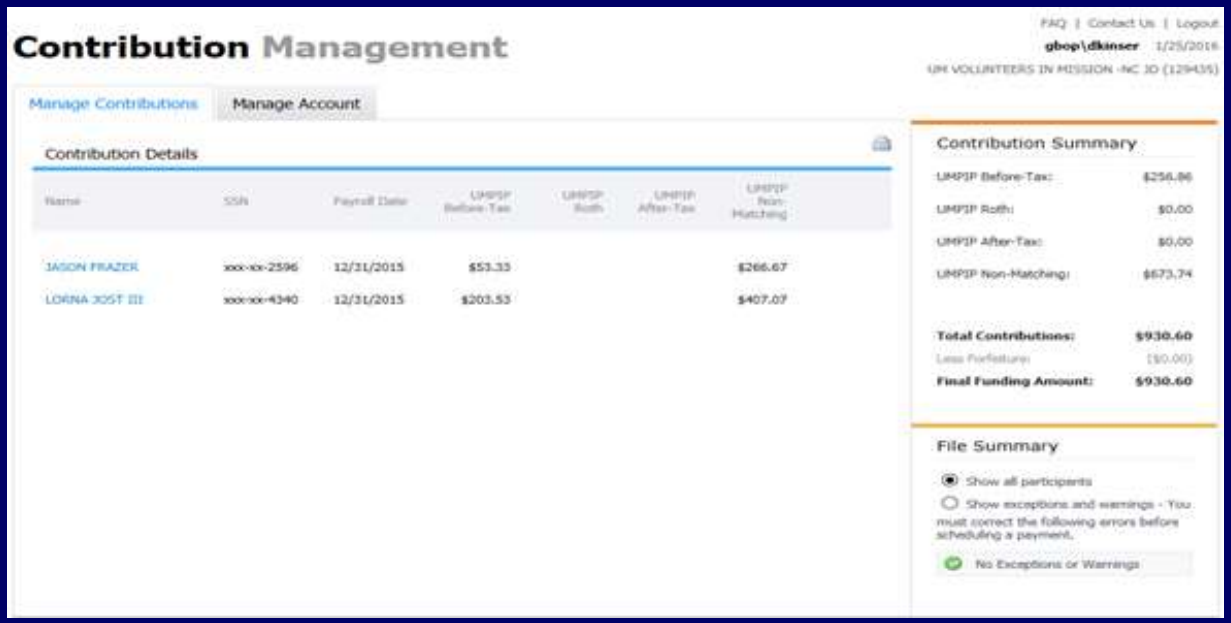
Conference Forum 2016

General Board
Pension and Health Benefits

Caring For Those Who Serve

Contribution Management Service

- Make changes online
- Upload files—submit contributions at a frequency you choose
- Select payment date
- Pay contributions—use your Wespath account or bank account
- Receive account notifications by e-mail
- View a rolling 12-month account history



Contribution Management

FAQ | Contact Us | Logout
gbop\dkinser 1/25/2016
UM VOLUNTEERS IN MISSION -NC JD (129435)

Manage Contributions | Manage Account

Contribution Details

Name	SSN	Payroll Date	UMPIP Before-Tax	UMPIP Roth	UMPIP After-Tax	UMPIP Non-Matching
JASON FRAZER	xxx-xx-2596	12/31/2015	$53.33			$266.67
LORNA JOST III	xxx-xx-4340	12/31/2015	$203.53			$407.07

Contribution Summary

UMPIP Before-Tax:	$256.86
UMPIP Roth:	$0.00
UMPIP After-Tax:	$0.00
UMPIP Non-Matching:	$673.74
Total Contributions:	**$930.60**
Less Forfeitures:	($0.00)
Final Funding Amount:	**$930.60**

File Summary

- (•) Show all participants
- ( ) Show exceptions and warnings - You must correct the following errors before scheduling a payment.

No Exceptions or Warnings

UM VOLUNTEERS IN MISSION -NC JD
6930 HUNTER CREEK
KALAMAZOO MI 49048

FOR THE PERIOD: 11/01/15 TO 11/30/15 PAGE: 1
000001151130ER01129435
CONFERENCE NUMBER: 0
EMPLOYER NUMBER: 129435

REMITTANCE REMINDER

SOCIAL SECURITY	NAME	UMPIP SPONSOR	UMPIP AFTER TAX	UMPIP BEFORE TAX	COMPREHENSIVE PROTECTION	TOTAL
XXX-XX-2596	FRAZER, JASON E			53.33		53.33
XXX-XX-4340	JOST III, LORNA	407.07		203.53		610.60
	TOTALS FOR THIS PERIOD	407.07		256.86		663.93

We have made every effort to ensure the accuracy of the information reflected on this remittance reminder. If you disagree any amount billed please call the General Board at 1-800-851-2201 and select the option for Plan Sponsor, Church or Employe Representatives are available Monday through Friday, 8:00 am to 6:00 pm Central Time, to assist you.

PLEASE REMIT THIS STUB WITH PAYMENT BY: 12/01/15 000001151130ER01129435

TOTAL CONTRIBUTION DUE: 663.93 AMOUNT PAID: _____
EMPLOYER NAME: UM VOLUNTEERS IN MISSION -NC JD

Bill Comparison

Contribution Management Statistics

Plan Sponsors Using Contribution Management

Total Plan Sponsors: 891

	Generate Monthly Bills	Use Recurring Payment Options	Upload Files
Conferences: 26	18		8
Churches: 707	663	242	44
Organizations: 145	121	15	24
General Agencies/ Bishops/ Missionaries: 13			13

Timeline

Paper Bill					
Bill generated	Bill mailed	Receive and review bill	Mail check and remittance stub to GBPHB lockbox	Receive check and remittance stub at GBPHB lockbox	Process changes (if applicable)
5th business day	1-3 business days	3-7 business days		1-2 days if paid as billed	1-5 business days at the GBPHB

Contribution Management Generated Bill			
Bill generated	E-mail notification	Review bill for changes and schedule payment	Contributions post to participant accounts
5th business day	6th business day		1 day if Wespath account 2 days if bank ACH

Contribution Management Upload File	
File uploaded and payment scheduled	Contributions post to participant accounts
1 day	1 day if Wespath account; 2 days if bank ACH

Sign-up for Contribution Management

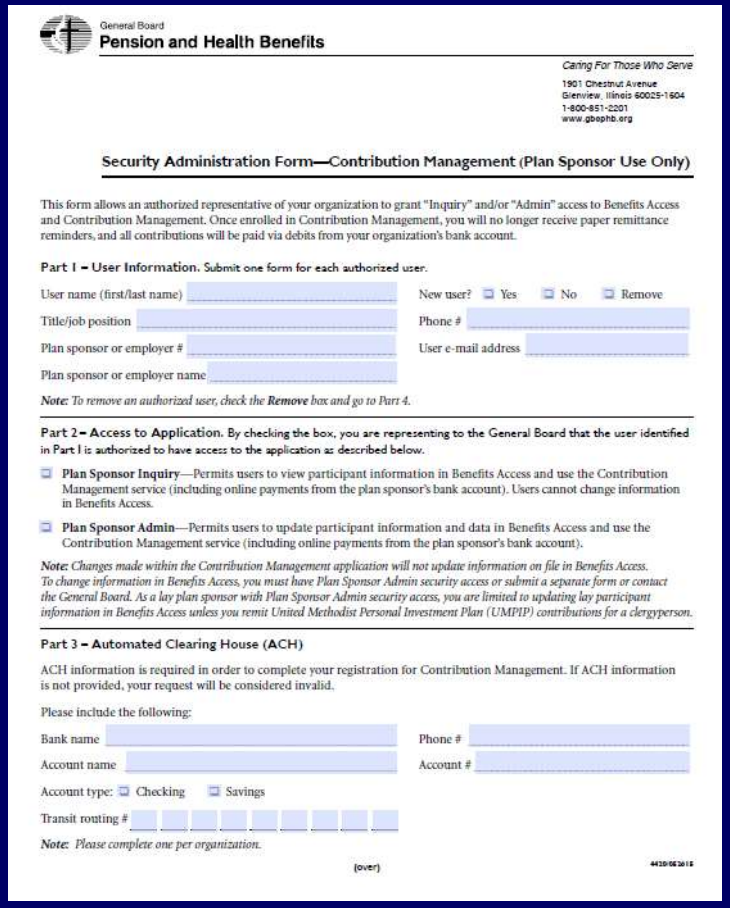
1. Log in to **Benefits Access**
2. Sign in with current **username** and **password**
3. Select "**Contribution Remittance**"
4. Select "**Contribution Management**"

Contact Pension Administration

1-800-851-2201 (select 3, then 2)

pateam@gbophb.org

Add, Change or Remove Users



General Board
Pension and Health Benefits

Caring For Those Who Serve

1901 Chestnut Avenue
Glenview, Illinois 60025-1604
1-800-851-2201
www.gbophb.org

Security Administration Form—Contribution Management (Plan Sponsor Use Only)

This form allows an authorized representative of your organization to grant "Inquiry" and/or "Admin" access to Benefits Access and Contribution Management. Once enrolled in Contribution Management, you will no longer receive paper remittance reminders, and all contributions will be paid via debits from your organization's bank account.

Part 1 – User Information. Submit one form for each authorized user.

User name (first/last name) _____ New user? ☐ Yes ☐ No ☐ Remove

Title/job position _____ Phone # _____

Plan sponsor or employer # _____ User e-mail address _____

Plan sponsor or employer name _____

Note: *To remove an authorized user, check the* ***Remove*** *box and go to Part 4.*

Part 2 – Access to Application. By checking the box, you are representing to the General Board that the user identified in Part I is authorized to have access to the application as described below.

☐ **Plan Sponsor Inquiry**—Permits users to view participant information in Benefits Access and use the Contribution Management service (including online payments from the plan sponsor's bank account). Users cannot change information in Benefits Access.

☐ **Plan Sponsor Admin**—Permits users to update participant information and data in Benefits Access and use the Contribution Management service (including online payments from the plan sponsor's bank account).

Note: *Changes made within the Contribution Management application will not update information on file in Benefits Access. To change information in Benefits Access, you must have Plan Sponsor Admin security access or submit a separate form or contact the General Board. As a lay plan sponsor with Plan Sponsor Admin security access, you are limited to updating lay participant information in Benefits Access unless you remit United Methodist Personal Investment Plan (UMPIP) contributions for a clergyperson.*

Part 3 – Automated Clearing House (ACH)

ACH information is required in order to complete your registration for Contribution Management. If ACH information is not provided, your request will be considered invalid.

Please include the following:

Bank name _____ Phone # _____

Account name _____ Account # _____

Account type: ☐ Checking ☐ Savings

Transit routing # _____

Note: *Please complete one per organization.*

(over)

To add, change or remove users, complete and submit a *Security Administration Form* to:

Pension Administration Team
pateam@gbophhb.org

The form is available at:
https://extranet.gbophb.org

General Board

Pension and Health Benefits

Wespath

Investment Management