

Benefits Access for Plan Sponsors (BAP)—Quick Tips

Benefits Access for Plan Sponsors (BAP) is Wespath's online benefit plan administration tool. BAP enables you to add and maintain records for your participants. BAP features three main pages—*Conference, Organization,* and *Participant*—which connect you with key information and the functions necessary to complete your tasks. Below is an overview of what is available on each page. The table below outlines which tasks can be completed in each module.

Conference Page	Organization Page	Participant Page
Reports: Generate conference or organization specific dat	a extracts and participant service record and years of servic	e reports.
Batch-Upload: Upload files in order to modify multiple pa	rticipant records at a time.	 Profile Actions: Enter life events and access Benefits Access for Participants. (page 11)
 To Do: Access new participants and clergy from outsit compensation needs to be entered. (page 8) 	ide the annual conference for which service and	Notes : Displays additional information about the participant, if applicable.
Contribution Remittance : Access details of monthly confe or access Contribution Management, Wespath's online bil	rence-remitted plan contributions and premiums ling tool.	Participant and Related Individual: Add and maintain indicative and contact information for a participant and his or her related individuals
Add New Participant: Enter indicative data for a new (page 2)	v participant.	(i) Membership: Maintain clergy membership details. (page 3)
Conference/Organization : View the conference or organiz	ation profile.	Service and Compensation: Add new service and/ or compensation or edit inaccurate service details. (page 4)
Contacts : View conference office or organization contacts	as well as assigned Wespath support staff.	 Plan Enrollments : View, waive, or update benefit plan enrollments and participant contribution elections. (page 10)
Adoption Agreements: Displays elections of sponsored W	espath-administered programs.	Future Dated Events: Manage participant changes
Employees: Lists all clergy or lay participants actively servi	ing the conference or organization.	 effective at a later date. (page 12)
Clergy Retirement Manager: Manage eligible-to-retire clergy		





The following instructions demonstrate how to add a new participant. New participants without service and compensation will appear under "To Do".

To Add New I	Participant:
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1. On your Conference or Organization page, open Add New Participant

2. Enter the required personal information (e.g., name and birth date) and click **Save**

After saving ,you will be redirected to the participant page

Continue to <u>Add Membership</u> and <u>Add</u> <u>Service and Compensation</u>, as applicable.

Title	First Nam	ie*		Middle Name	Last	Name*		Suffix	
~									
Birth Date*		Gender* Male Female		Country Of Citizens	ship*	~			
Country*		~							
Address Line 1*			Address L	ine 2	Addr	ess Line 3			
City		State			Zip				
				~					
Phone		Alternate F	hone	Email					
* Required field.									
							2 .	ave 🗶 Can	ice





Use the Membership module to enter new membership status and/or conference membership. You can also edit incorrect information here.

To Add Membership:	
I. On the participant page under Nembership , click Add	▲ Membership ② Refresh + Add
 2. Enter the required membership information (e.g., effective date and membership type) 3. OPTIONAL - If the participant's appointment, including appointment 	Type of Record being Added * New (Current) Membership Type * Y
percentage and compensation, are to be retained. Select the checkbox next to "This will retain the current, active service record(s)."	Effective Dates *
4. Click Save	This will retain the current, active service record(s).
<u>Fo Edit Membership</u>	4 Save X Cancel
L. Click Edit next to the inaccurate membership record	
2. Update the membership information (e.g., nembership type) and click Save	





Use the Service and Compensation module to enter new compensation for current services.

To Add Compensation For Current Services: 1. On the participant page under Service and Compensation, click Add	1 + Add - Compensation 2 Service	
2. Select Compensation		
3. Enter the required compensation information (e.g., effective date and compensation components) and click Save <i>Note: Compensation for participants with</i> <i>multiple services may be entered separately.</i> <i>Simply enter the applicable information for</i> <i>one or more services leaving the other services</i> <i>blank.</i>	Service and Compensation Add Compensation Service Effective Dates* Cash excluding Housing Parsonag Compensation (C)* Allowance (H) Pr S O S O S O S O S O S O S O S	♦ Action • e Total Plan Compensation (C+H or C+P) Portion of Cash Designated as Health Care Compensation \$0 \$0 \$0 \$0 \$0 So Compensation \$0 \$0 So Compensation \$0 So So Compensation So So Compensation Compensation

i) Service and Compensation: Add Service and Compensation



Use the Service and Compensation module to add new service and compensation, including changes in appointment percentage.

To Add New Service and Add • **Compensation:** Compensation 1. On the participant page under Service and Service Compensation, click Add 2. Select Service Service and Compensation C Refresh 🌣 Action 🗸 + Add -3. Select New (Single) as the type of record Type of Record being Added* being added and enter the required service • New (Single) 2 O New (Multiple) 0 346.1 Membership* and compensation information (e.g., effective 1 - PART-TIME LOCAL PASTOR - 110 - NORTHERN ILLINOIS - (1/1/2017 - V date, service details, and compensation Employer / Organization* Service Type* Appointment / Hours* components, if applicable) and click Save \sim \sim Search Note: Participants experiencing a change in Effective Dates* Responsible Conference* \sim appointment percentage or hours worked (i.e., full-time to part-time or vice versa) require a Compensation new service record. Use Add Service and NOT APPLICABLE Compensation in these situations. * Required field. X Cancel ✓ Save

i Service and Compensation: Add Multiple Appointments

Т



Use the Service and Compensation module to add multiple appointments.

 To Add Multiple Appointments: 1. For the first appointment, follow the steps to Add New Service and Compensation 2. For the second appointment, click Add 		+ Add - Compensation Service 2					
again and select Service	 Service and Compensation 	ion			🗢 Action 🗸	${\cal G}$ Refresh	+ Add -
3. Select New (Multiple) as the type of record being added. Enter the service details for the second appointment and click Save	Type of Record being Added* O New (Single) Membership* 1 - PART-TIME LOCAL PASTO	New (Multiple)	○ 346.1 /1/2017 - ❤				
Repeat steps 2-3 for each additional appointment	Service Type*	Appointment / Hou	urs*	Employer / O Search	rganization*		
	Effective Dates*			Responsible	Conference*	V Saus	Cancel
						✓ Save X	Cancel

Service and Compensation: Edit Service or Compensation



Use the Service and Compensation module to edit inaccurate service or compensation information.

To Edit Service or Compensation: 1. Click **Edit** next to the incorrect service FIRST EVANSTON NORTHERN 01/01/2017 ✓ APPT 25% 🖸 Edit ILLINOIS 2. Update the service and/or compensation information (e.g., employer/organization or ^ Service and Compensation 🌣 Action 🗸 C Refresh + Add compensation components) and click Save **APPT 25%** Membership* Note: Use Edit only when the information was 1 - PART-TIME LOCAL PASTOR - 110 - NORTHERN ILLINOIS - (1/1/2017 - V entered incorrectly for the entire effective Employer / Organization* Service Type* Appointment / Hours* date period of the service. Use Add for ACTIVE \sim APPT 25% v 516004 - FIRST EVANSTON changes effective as of a subsequent date. Effective Dates* Responsible Conference* 藚 NORTHERN ILLINOIS (110) \sim 01/01/2017 Insert Compensation Cash excluding Portion of Cash Total Plan Housing Parsonage Health Care Effective Dates Health Care Compensation Designated as Compensation (C)* Allowance (H) (P) Compensation (C+H or C+P) Housing 旨 **#** \$ 10,000 \$ 01/01/2017 5,000 \$15,000 Required field. X Cancel Save

record

i To Do: Appointments under *Discipline* ¶346.1



Use the Service and Compensation and To Do modules to manage clergy appointed under *Discipline* ¶346.1.





Use Add New Service and Add Compensation to complete the process for clergy appointed under *Discipline* ¶346.1.

To Add Service and Compensation for a Participant from Another Conference:	If the effective dat	e is in the past		
comerence.	❤ 346.1	ARKANSAS	6 02/01/2017	1 C Edit
A. If the effective date is in the past , 1. Click Edit next to the 346.1 record.	346.1 Membership*			
2. Change the Service Type to Active. Enter	1 - PART-TIME LOCAL PASTOR - 110 - NO	DRTHERN ILLINOIS - (1/1/2017 - V		
3. Click Add and select Compensation to	ACTIVE	Appointment / Hours*	Employer / Organization*	
enter the compensation information and click	Effective Dates*		Responsible Conference*	
The 346.1 record will be replaced with	02/01/2017	m	ARKANSAS (510)	~
the applicable Discipline $\P346.1$ appointment information.	+ Add -			
B. If the effective date is in the future ,	Compensation 5			
4. Click Add and select Service to enter the applicable service and compensation information and click Save	Service			
The green, 346.1 record will be	If the offective det	o ic in the future		

If the effective date is in the **future**



to the 346.1 record.

replaced with the applicable

appointment information. Click Cancel

to remove the information and return

i) Maintain Plan Enrollments: Waivers and Contribution Elections



The Plan Enrollments module is used to view current plan eligibility, to enter waivers of plan participation, and to update participant contribution elections.

To waive plan participation:	 Plan Enrollments 	3				🌣 Ac	tion 🗸 📿 Refresh
1. On the participant page, open Plan E nrollments	Current Plan Enro	T SECURITY PROGRAM	1				
2. Click Edit next to the applicable plan name	Action*	Waive field.	Effective Dat	te*			
3. Enter the required information (e.g., action and effective date) and click Save						3 🗸	ave X Cancel
						04/04/20147	
	• UMP110	ENROLLED			GLENVIEW	01/01/2017	4 C'Edit
To update participant contribution elections:	UMP110 Service Type ACTIVE Name	Appointment / Hours APPT 25% Status	Employer / Or FIRST EVANS Effective Date	rganization STON	Responsible Cor NORTHERN ILLIN	nference	Effective Dates 01/01/2017
4. Click Edit next to the applicable plan ID and service	UMP110 Billing Destination* O NORTH ILL CONF O	ENROLLED	01/01/2017 ON				
	Monthly Contribution	Details					
5. Enter the required information (e.g., effective date, type, and value) and click Save	Effective Date*	Before Tax Type	Value	Roth Type	Value	After Tax Type	Value
	01/01/2017	Select V		Select	•	Select	•
	* Required field.						
						5	Save Cancel





Events that impact the entire participant record (e.g., termination) are entered using links available from the main participant menu.

To enter a life event:

1. On the participant page, select the participant's name in the top, left corner

2. Select the applicable **life event** (i.e., termination, death, or retirement*) *for lay participants only

3. Follow the prompts to enter the required information and click **Save**

This same menu provides access to the participant's information in Benefits Access for Participants, Wespath's online participant account management tool.







The following instructions relate to managing changes effective at a later date.

To Add A Future Dated Event: Address Effective Date * 1. Simply add the new information in the 07/01/2017 × normal manner using an effective date greater than today's date **To Cancel A Future Dated Event:** Participant and Related Individual C Refresh + Add 2. Cancel future dated events if the pending event will no longer occur in the future or if PARTICIPANT DOE, JOHN X Cancel 🖸 Edit you need to change the information within the future event. SSN Name Birth Date Death Date ***-**-1316 JOHN DOE 01/01/1960 N/A 57 years and 1 month Gender Marital Status Address Address Effective Date Male Not Married 1201 DAVIS ST 07/01/2017 - Future 02/20/2017 - Current View EVANSTON, ILLINOIS 60201-0000 **Country Of Citizenship** UNITED STATES UNITED STATES Alternate Phone Beneficiaries Last Updated Phone (847) 555-1234 Invalid Address Email No JDOE@GMAIL.COM Last updated by GBOPEXTDEV/USER1 02/20/2017 02:56:36 PM