Wespath
BENEFITS | INVESTMENTS

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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.

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Adding a New Participant

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

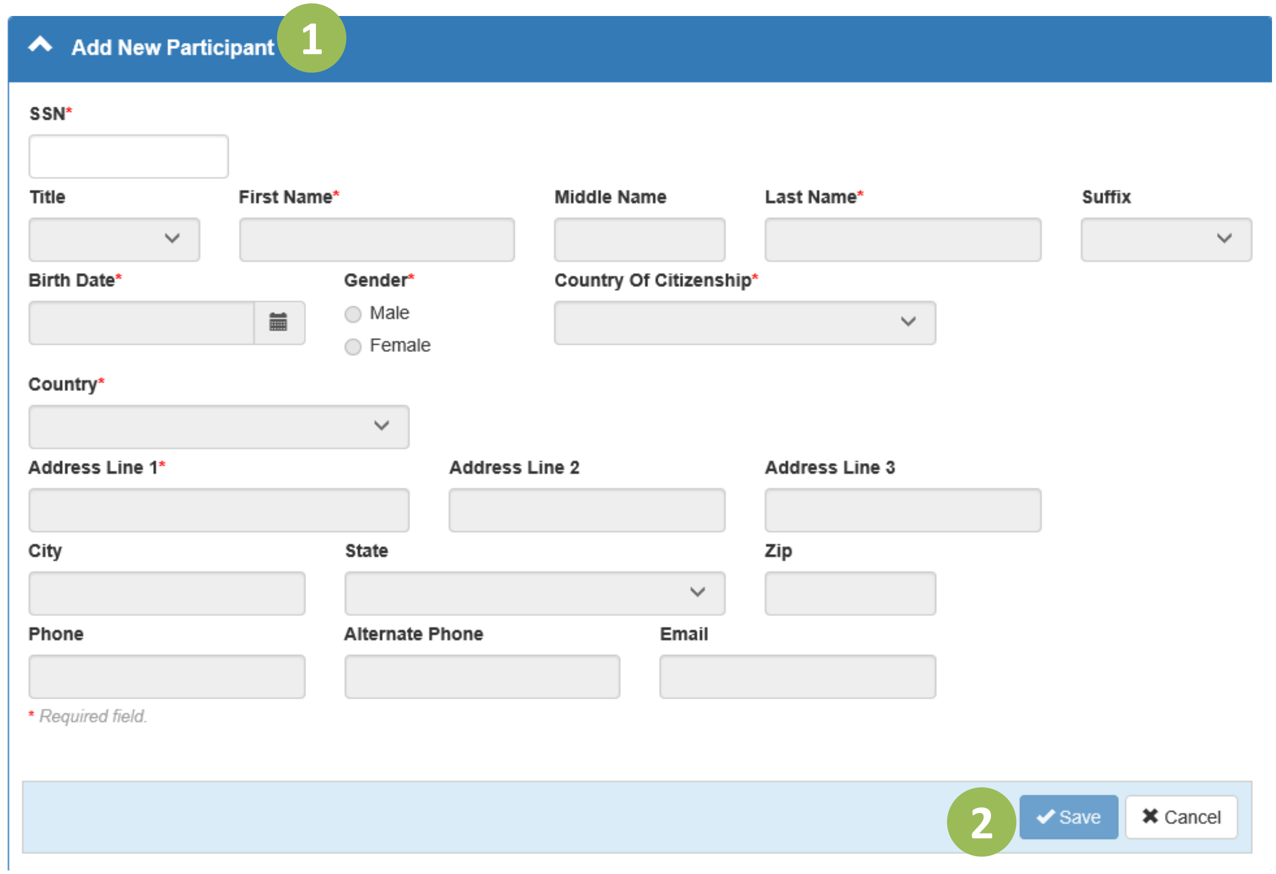
<u>To Add New Participant:</u>

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 **Add Membership** and **Add Service and Compensation,** as applicable.



Membership: Add or Edit Membership

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

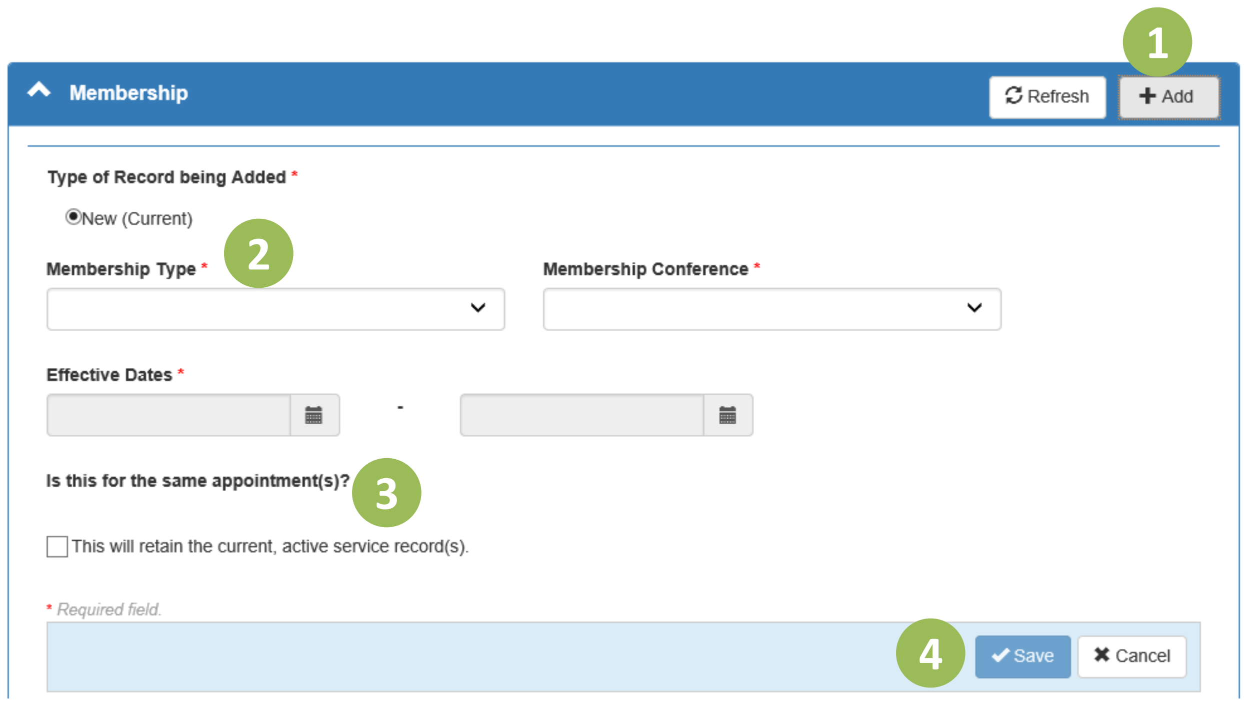
To Add Membership:

1. On the participant page under **Membership**, click **Add**

2. Enter the required membership information (e.g., effective date and membership type)

3. **OPTIONAL** - If the participant's appointment, including appointment percentage and compensation, are to be retained. Select the **checkbox** next to "This will retain the current, active service record(s)."

4. Click **Save**



To Edit Membership

1. Click **Edit** next to the inaccurate membership record

2. Update the membership information (e.g., membership type) and click **Save**

Service and Compensation: Add Compensation

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

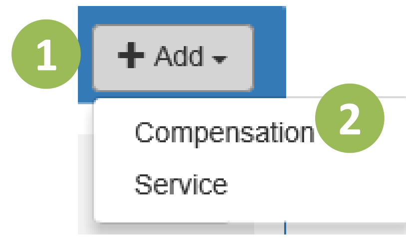
To Add Compensation For Current Services:

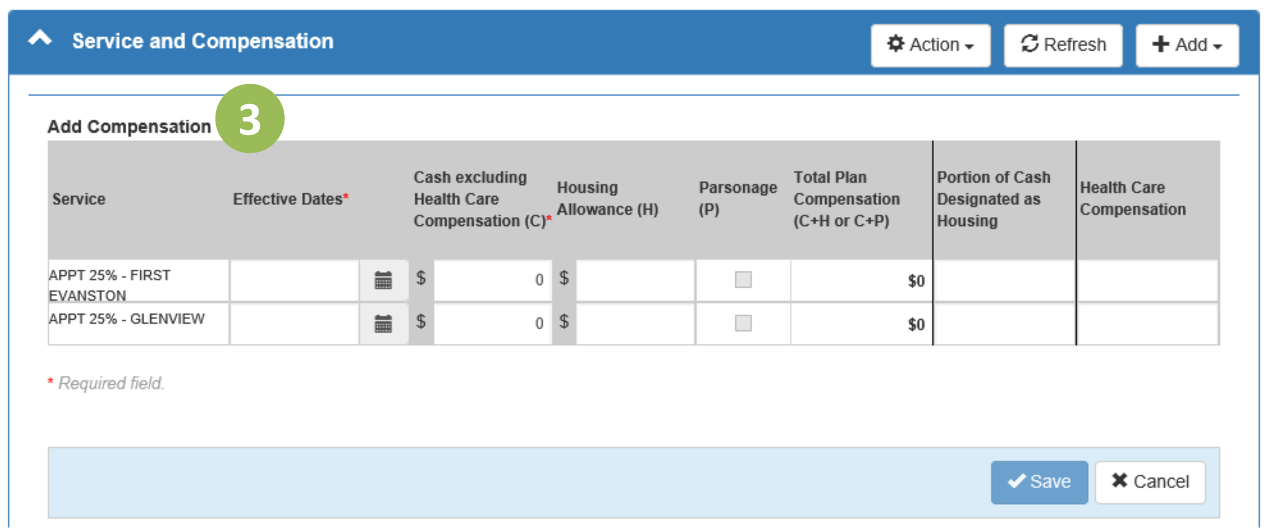
1. On the participant page under **Service and Compensation**, click **Add**

2. Select **Compensation**

3. Enter the required compensation information (e.g., effective date and compensation components) and click **Save**

Note: Compensation for participants with multiple services may be entered separately. Simply enter the applicable information for one or more services leaving the other services blank.





Service and Compensation: Add Service and Compensation

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

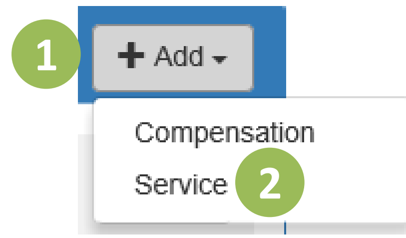
To Add New Service and Compensation:

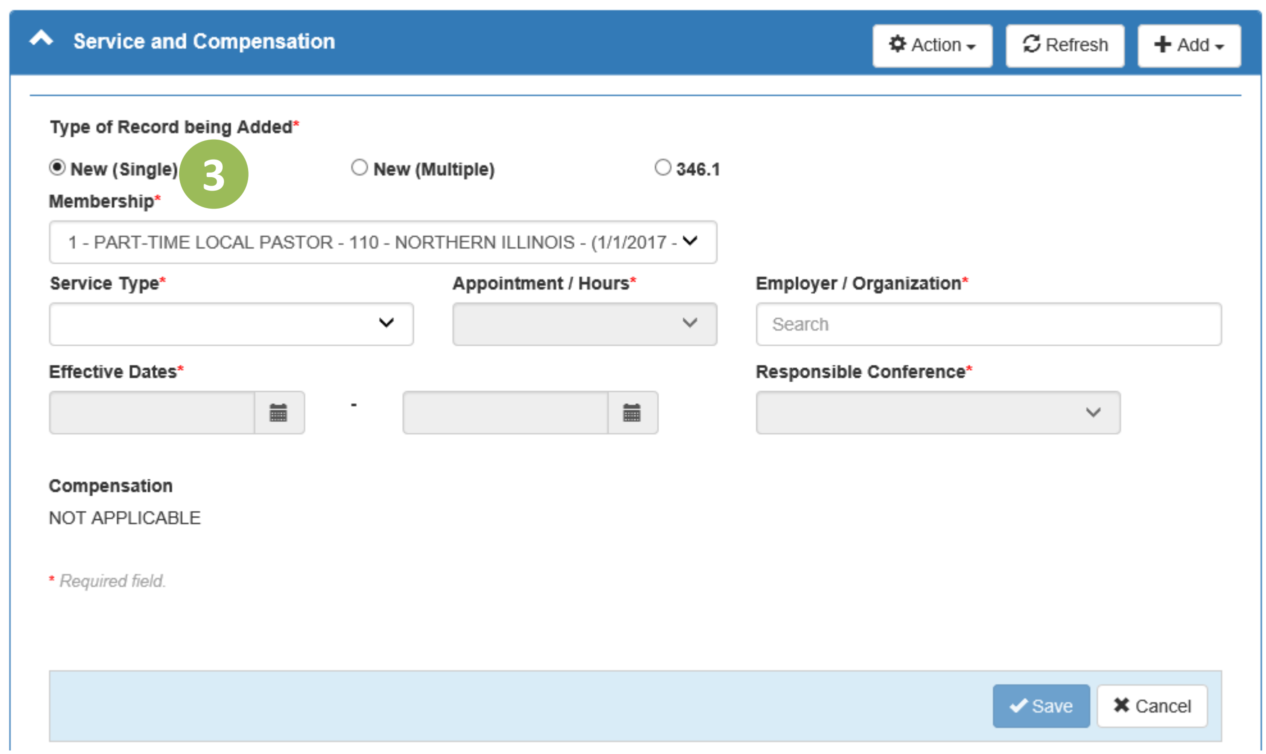
1. On the participant page under **Service and Compensation**, click **Add**

2. Select **Service**

3. Select **New (Single)** as the type of record being added and enter the required service and compensation information (e.g., effective date, service details, and compensation components, if applicable) and click **Save**

Note: Participants experiencing a change in appointment percentage or hours worked (i.e., full-time to part-time or vice versa) require a new service record. Use Add Service and Compensation in these situations.





Service and Compensation: Add Multiple Appointments

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Use the Service and Compensation module to add multiple appointments.

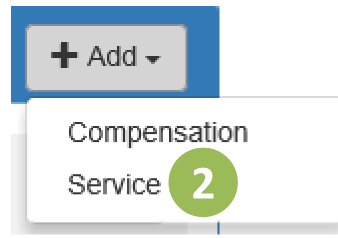
To Add Multiple Appointments:

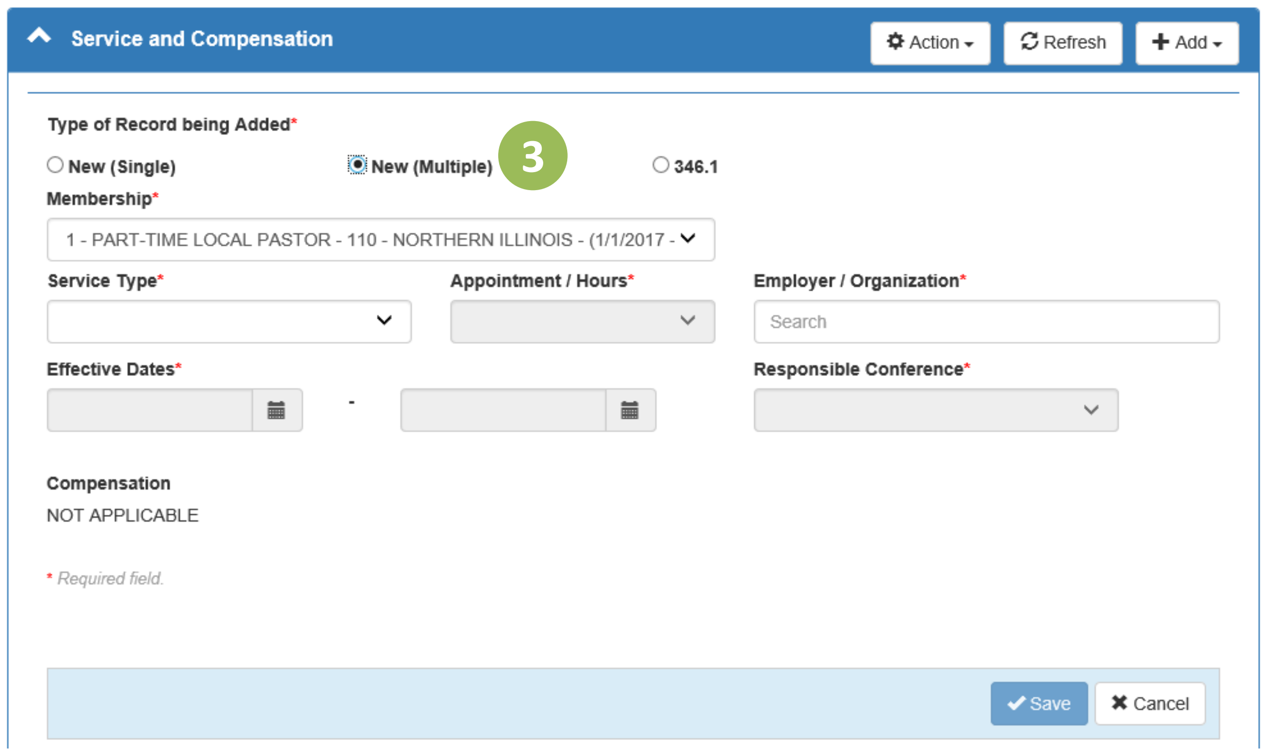
1. For the first appointment, follow the steps to [Add New Service and Compensation]()

2. For the second appointment, click **Add** again and select **Service**

3. Select **New (Multiple)** as the type of record being added. Enter the service details for the second appointment and click **Save**

Repeat steps 2-3 for each additional appointment





Service and Compensation: Edit Service or Compensation

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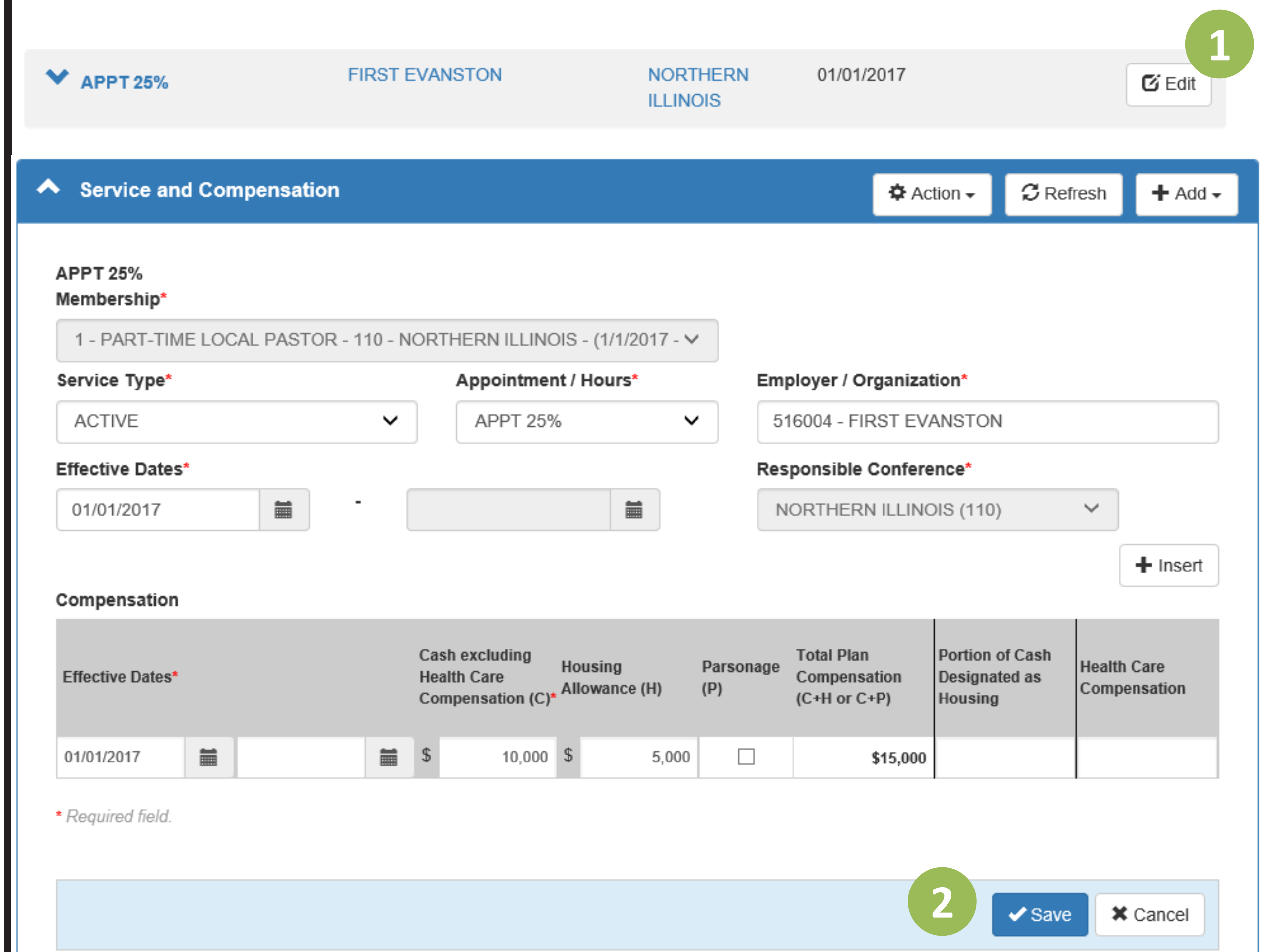
Use the Service and Compensation module to edit inaccurate service or compensation information.

To Edit Service or Compensation:

1. Click **Edit** next to the incorrect service record

2. Update the service and/or compensation information (e.g., employer/organization or compensation components) and click **Save**

*Note: Use **Edit** only when the information was entered incorrectly for the entire effective date period of the service. Use **Add** for changes effective as of a subsequent date.*



To Do: Appointments under *Discipline* ¶346.1

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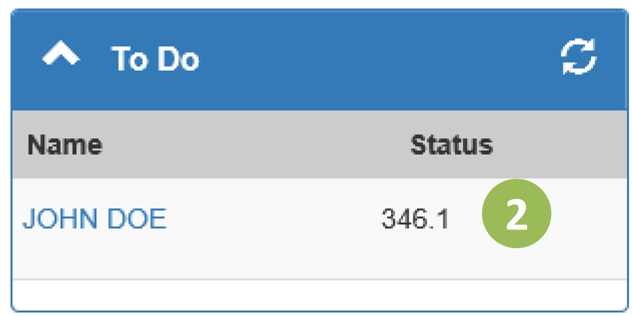
Use the Service and Compensation and To Do modules to manage clergy appointed under *Discipline* ¶346.1.

To Release a Participant to Another Conference:

1. On the participant page under **Service and Compensation**, click **Add.** Select **Service** and choose **346.1** as the type of record being added. Enter the required information (e.g., effective date and responsible conference) and click **Save.**

To Receive a Participant from Another Conference:

2. On the conference page under **To Do**, select the participant's name
You will be redirected to the participant page



To Do: Appointments under *Discipline* ¶346.1

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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:

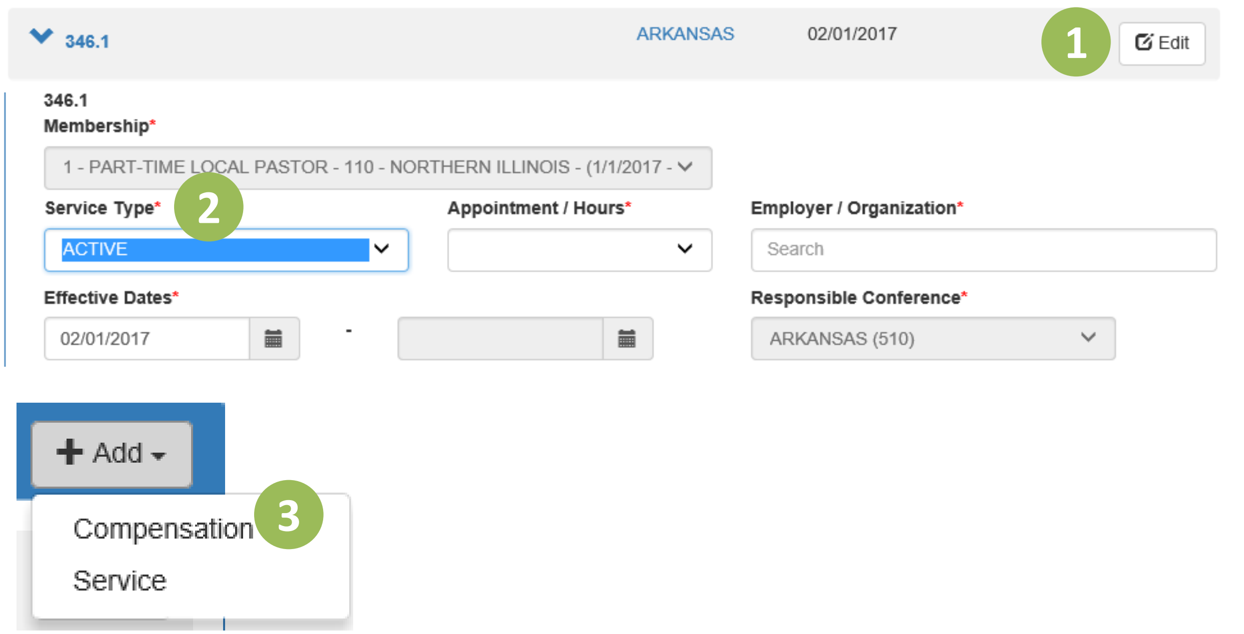
***A.** If the effective date is in the **past**,*
1. Click **Edit** next to the 346.1 record.
2. Change the **Service Type** to **Active.** Enter the applicable information and click **Save.**
3. Click **Add** and select **Compensation** to enter the compensation information and click **Save.**

> *The 346.1 record will be replaced with the applicable Discipline ¶346.1 appointment information.*

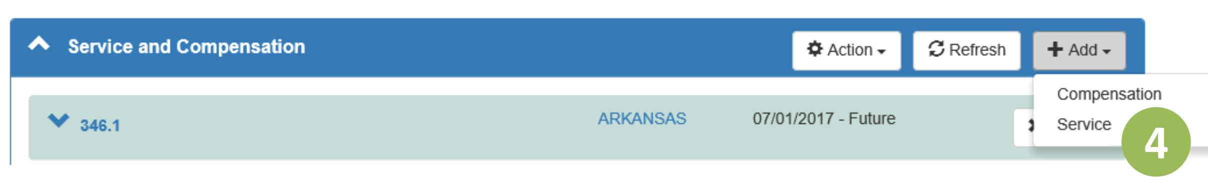
***B.** If the effective date is in the **future**,*
4. Click **Add** and select **Service** to enter the applicable service and compensation information and click **Save**

> *The green, 346.1 record will be replaced with the applicable appointment information. Click **Cancel** to remove the information and return to the 346.1 record.*

*If the effective date is in the **past***



If the effective date is in the future



Maintain Plan Enrollments: Waivers and Contribution Elections

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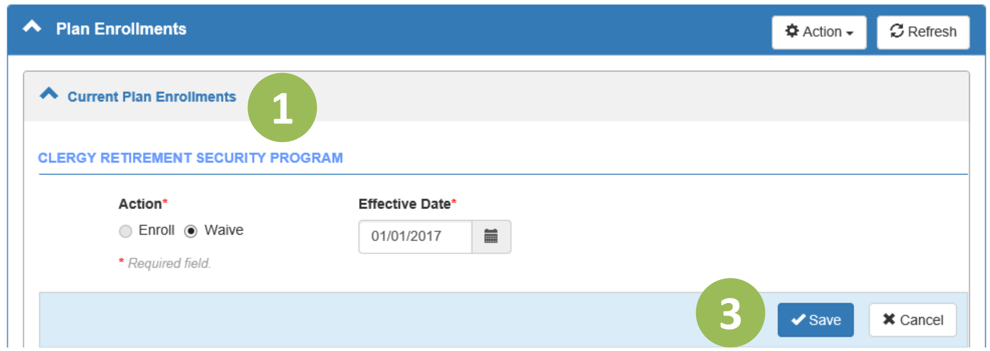
The Plan Enrollments module is used to view current plan eligibility, to enter waivers of plan participation, and to update participant contribution elections.

To waive plan participation:

1. On the participant page, open **Plan Enrollments**

2. Click **Edit** next to the applicable plan name

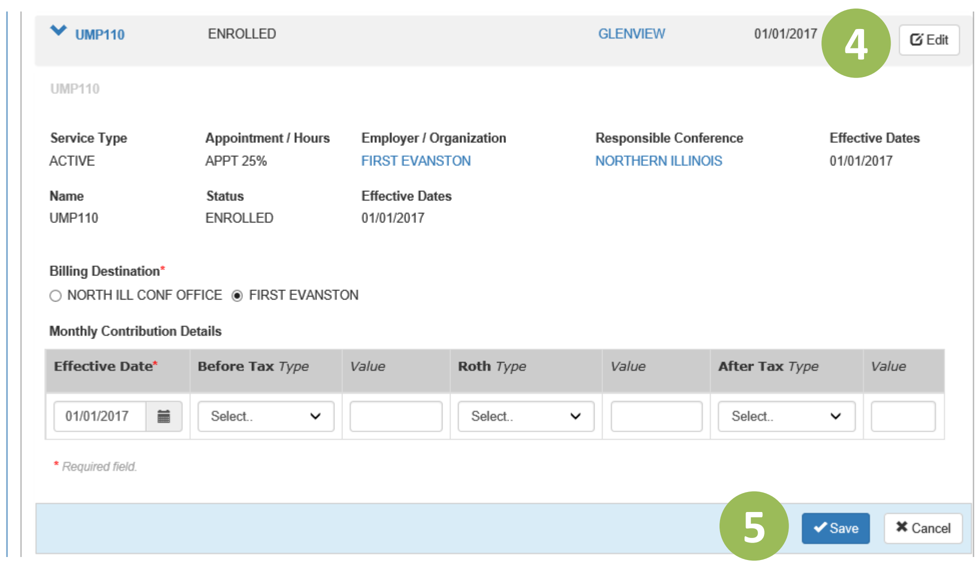
3. Enter the required information (e.g., action and effective date) and click **Save**



To update participant contribution elections:

4. Click **Edit** next to the applicable plan ID and service

5. Enter the required information (e.g., effective date, type, and value) and click **Save**



Profile Actions: Enter Life Events

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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.

Future Dated Events

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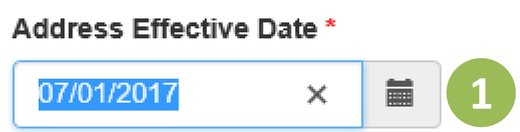
The following instructions relate to managing changes effective at a later date.

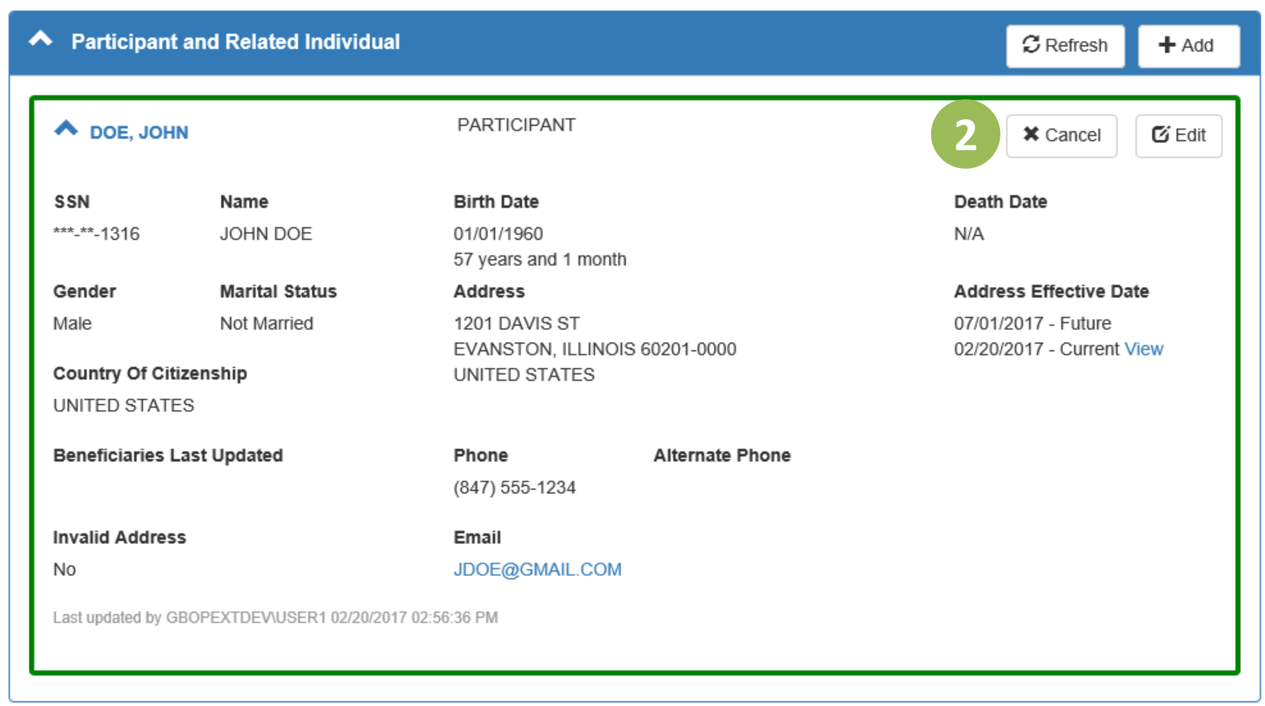
To Add A Future Dated Event:

1. Simply add the new information in the normal manner using an effective date greater than today's date



To Cancel A Future Dated Event:

2. Cancel future dated events if the pending event will no longer occur in the future or if you need to change the information within the future event.



Service and Compensation: Add Moving Expense Payment

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Use the **Service and Compensation** module to enter moving expense payments for the current tax year.

To Add Moving Expense Payments:

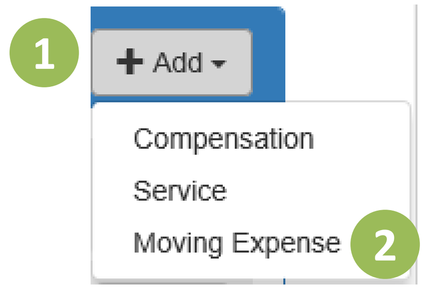
1. On the participant page under **Service and Compensation**, click **"Add"**

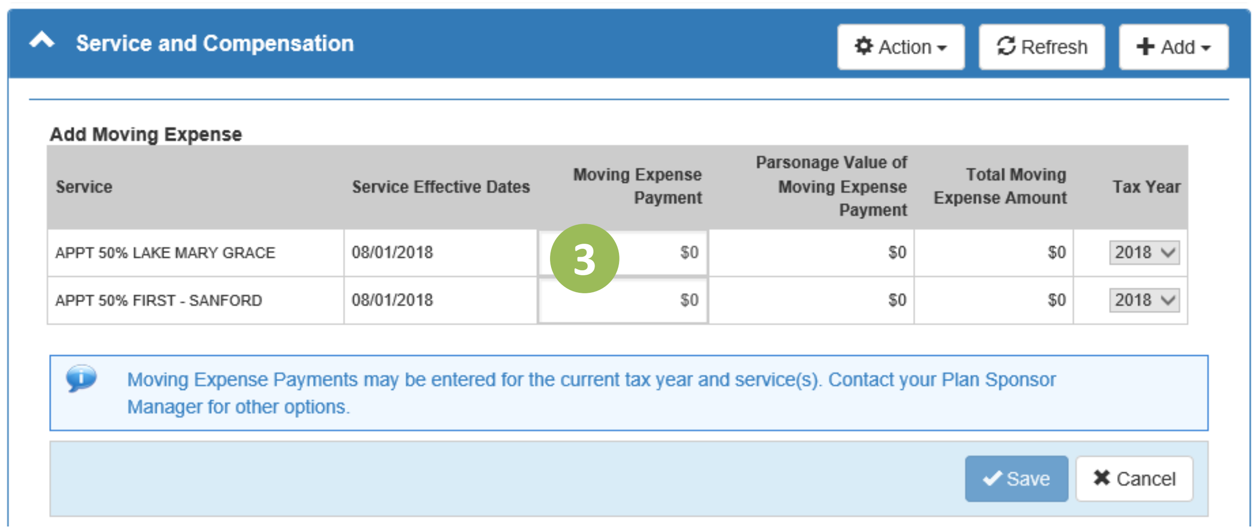
2. Select **"Moving Expense"**

3. Enter the *Moving Expense Payment* amount and click **"Save"**

4. BAP will automatically calculate the **Parsonage Value of Moving Expense Payment**, if any, and provide the **Total Moving Expense Amount**

Note: Moving expense payments for participants with multiple appointments may be entered separately. Simply enter the applicable information for one or more appointments and leave the others blank.





Service and Compensation: View Moving Expense Payments

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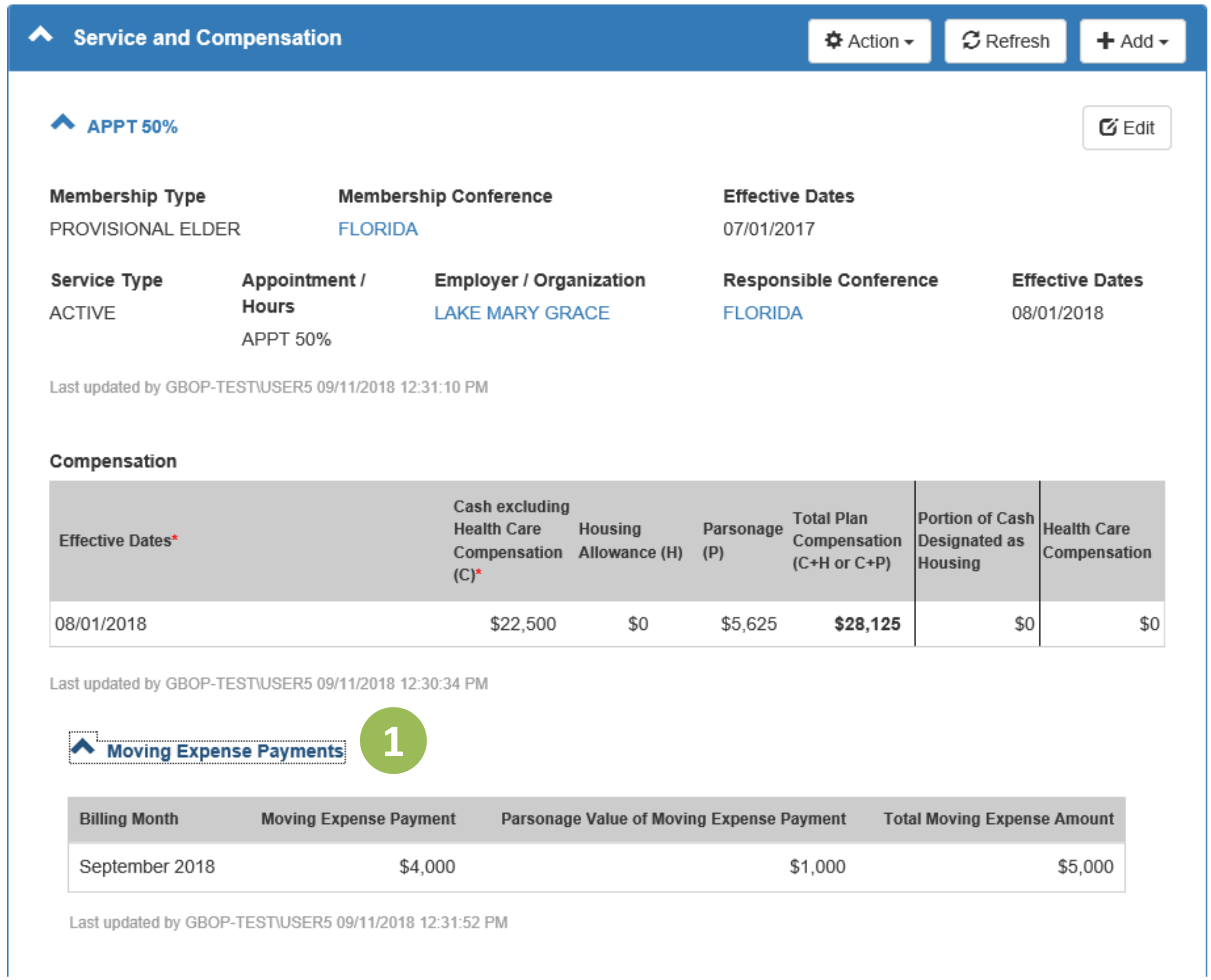
Use the **Service and Compensation** module to view moving expense payment information.

To View Moving Expense Payments:

1. With the service and compensation details expanded, click the **"Moving Expense Payments"** link to display any previously entered records

*Note: Click **"View"** next to the **Moving Expense Payments** in the **Reports** module of the conference or organization page to retrieve a list of all moving expense payments.*



Service and Compensation: Edit Moving Expense Payments

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Use the **Service and Compensation** module to edit moving expense payment information.

To Edit Moving Expense Payments:

1. Click **"Edit"** next to the applicable service record

2. Click **Moving Expense Payments** to expand the previously entered records

3. Update the **Moving Expense Payment** amount and click **Save**

*Note: Use **Edit** only when a moving expense payment amount was already entered for the current month. Use **Add** for new or subsequent moving expense payments.*