

## 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
<b>Reports:</b> Generate conference or organization specific data extracts and participant service record and years of service reports.		
<b>Batch-Upload:</b> Upload files in order to modify multiple participant records at a time.		<b>i Profile Actions:</b> Enter life events and access Benefits Access for Participants. (page 11)
<b>i To Do:</b> Access new participants and clergy from outside the annual conference for which service and compensation needs to be entered. (page 8)		<b>Notes:</b> Displays additional information about the participant, if applicable.
<b>Contribution Remittance:</b> Access details of monthly conference-remitted plan contributions and premiums or access Contribution Management, Wespath’s online billing tool.		<b>Participant and Related Individual:</b> Add and maintain indicative and contact information for a participant and his or her related individuals
<b>i Add New Participant:</b> Enter indicative data for a new participant. (page 2)		<b>i Membership:</b> Maintain clergy membership details. (page 3)
<b>Conference/Organization:</b> View the conference or organization profile.		<b>i Service and Compensation:</b> Add new service and/or compensation or edit inaccurate service details. (page 4)
<b>Contacts:</b> View conference office or organization contacts as well as assigned Wespath support staff.		<b>i Plan Enrollments :</b> View, waive, or update benefit plan enrollments and participant contribution elections. (page 10)
<b>Adoption Agreements:</b> Displays elections of sponsored Wespath-administered programs.		<b>i Future Dated Events:</b> Manage participant changes effective at a later date. (page 12)
<b>Employees:</b> Lists all clergy or lay participants actively serving the conference or organization.		
<b>Clergy Retirement Manager:</b> Manage eligible-to- retire clergy		<b>i Service and Compensation: Add Moving Expense Payment</b> (page 13)



# 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".

## To Add New Participant:

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.

↑ Add New Participant 1

**SSN\***

**Title**  **First Name\***  **Middle Name**  **Last Name\***  **Suffix**

**Birth Date\***  **Gender\***  Male  Female **Country Of Citizenship\***

**Country\***

**Address Line 1\***  **Address Line 2**  **Address Line 3**

**City**  **State**  **Zip**

**Phone**  **Alternate Phone**  **Email**

\* Required field.

2



## 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**

The screenshot shows the 'Membership' form interface. At the top right, there is a 'Refresh' button and an '+ Add' button, with a green circle '1' next to the '+ Add' button. Below this is the 'Type of Record being Added' section with a radio button for 'New (Current)'. The 'Membership Type' dropdown menu is highlighted with a green circle '2'. To its right is the 'Membership Conference' dropdown menu. Below these is the 'Effective Dates' section with two date pickers. The 'Is this for the same appointment(s)?' section has a checkbox, with a green circle '3' next to the text. At the bottom, there is a light blue bar containing a 'Save' button and a 'Cancel' button, with a green circle '4' next to the 'Save' button. A red asterisk indicates required fields.



# Service and Compensation: Add Compensation



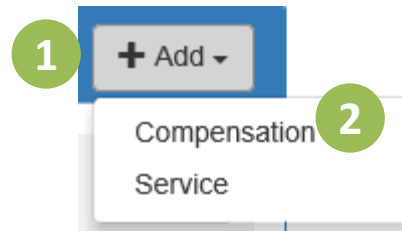
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Use the Service and Compensation module to enter new compensation for current services.

## 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

Action Refresh Add

Add Compensation

Service	Effective Dates*	Cash excluding Health Care Compensation (C)*	Housing Allowance (H)	Parsonage (P)	Total Plan Compensation (C+H or C+P)	Portion of Cash Designated as Housing	Health Care Compensation
APPT 25% - FIRST EVANSTON		\$ 0	\$	<input type="checkbox"/>	\$0		
APPT 25% - GLENVIEW		\$ 0	\$	<input type="checkbox"/>	\$0		

\* Required field.

Save Cancel



# Service and Compensation: Add Service and Compensation



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

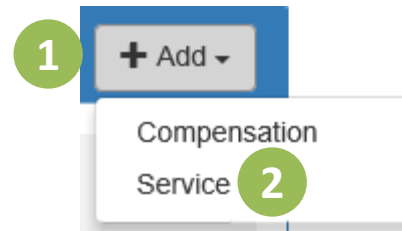
## To Add New Service and Compensation:

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** ⚙️ Action 🔄 Refresh + Add

**Type of Record being Added\***

**New (Single)** 3  New (Multiple) 346.1

**Membership\***

1 - PART-TIME LOCAL PASTOR - 110 - NORTHERN ILLINOIS - (1/1/2017 -

**Service Type\*** **Appointment / Hours\*** **Employer / Organization\***

**Effective Dates\*** **Responsible Conference\***

**Compensation**

NOT APPLICABLE

\* Required field.

✓ Save ✗ Cancel



## Service and Compensation: Add Multiple Appointments

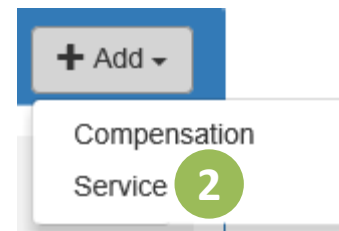


Use the Service and Compensation module to add multiple appointments.

### 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** [Action] [Refresh] [Add]

**Type of Record being Added\***

New (Single)  **New (Multiple)**  346.1

**Membership\***

1 - PART-TIME LOCAL PASTOR - 110 - NORTHERN ILLINOIS - (1/1/2017 -

**Service Type\*** **Appointment / Hours\*** **Employer / Organization\***

Effective Dates\* Responsible Conference\*

**Compensation**

NOT APPLICABLE

\* Required field.

[Save] [Cancel]



# 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.*

APPT 25%
FIRST EVANSTON
NORTHERN ILLINOIS
01/01/2017
Edit

Service and Compensation

Action
Refresh
Add

**APPT 25% Membership\***

1 - PART-TIME LOCAL PASTOR - 110 - NORTHERN ILLINOIS - (1/1/2017 -

**Service Type\***

ACTIVE

**Appointment / Hours\***

APPT 25%

**Employer / Organization\***

516004 - FIRST EVANSTON

**Effective Dates\***

01/01/2017

**Responsible Conference\***

NORTHERN ILLINOIS (110)

+ Insert

**Compensation**

Effective Dates*	Cash excluding Health Care Compensation (C)*	Housing Allowance (H)	Parsonage (P)	Total Plan Compensation (C+H or C+P)	Portion of Cash Designated as Housing	Health Care Compensation
01/01/2017	\$ 10,000	\$ 5,000	<input type="checkbox"/>	\$15,000		

\* Required field.

2
Save
Cancel



## 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

#### Type of Record being Added\*

New (Single)

New (Multiple)

1

346.1

To Do	
Name	Status
JOHN DOE	346.1 <span>2</span>





## 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***

346.1 ARKANSAS 02/01/2017 1 [Edit](#)

346.1  
Membership\*

1 - PART-TIME LOCAL PASTOR - 110 - NORTHERN ILLINOIS - (1/1/2017 - v

Service Type\* 2 Appointment / Hours\* Employer / Organization\*  
ACTIVE Search

Effective Dates\* Responsible Conference\*  
02/01/2017 ARKANSAS (510)

+ Add v 3  
Compensation  
Service

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

Service and Compensation [Action](#) [Refresh](#) [Add](#)

346.1 ARKANSAS 07/01/2017 - Future 4  
Compensation  
Service



# 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**

The screenshot shows the 'Plan Enrollments' interface. At the top, there is a header with 'Plan Enrollments', an 'Action' dropdown, and a 'Refresh' button. Below this is a section for 'Current Plan Enrollments' (Step 1) for the 'CLERGY RETIREMENT SECURITY PROGRAM'. It features an 'Action' field with radio buttons for 'Enroll' and 'Waive' (selected), and an 'Effective Date' field with a calendar icon and the date '01/01/2017'. A 'Save' button and a 'Cancel' button are at the bottom right (Step 3).

The second section shows details for 'UMP110' (Step 4). It includes fields for 'Service Type' (ACTIVE), 'Appointment / Hours' (APPT 25%), 'Employer / Organization' (FIRST EVANSTON), 'Responsible Conference' (NORTHERN ILLINOIS), and 'Effective Dates' (01/01/2017). There is an 'Edit' button. Below this is the 'Billing Destination' field with radio buttons for 'NORTH ILL CONF OFFICE' and 'FIRST EVANSTON' (selected). The 'Monthly Contribution Details' section has a table with columns for 'Effective Date', 'Before Tax Type', 'Value', 'Roth Type', 'Value', 'After Tax Type', and 'Value'. The 'Effective Date' field has a calendar icon and the date '01/01/2017'. The 'Before Tax Type' and 'Roth Type' fields are dropdown menus with 'Select..' options. The 'Value' fields are empty text boxes. A 'Save' button and a 'Cancel' button are at the bottom right (Step 5).



## 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.

### Address Effective Date \*

✕
📅
1

Participant and Related Individual
Refresh
+ Add

^
**DOE, JOHN**

PARTICIPANT

2
✕ Cancel
🔗 Edit

<b>SSN</b>	<b>Name</b>	<b>Birth Date</b>	<b>Death Date</b>
***-**-1316	JOHN DOE	01/01/1960 57 years and 1 month	N/A
<b>Gender</b>	<b>Marital Status</b>	<b>Address</b>	<b>Address Effective Date</b>
Male	Not Married	1201 DAVIS ST EVANSTON, ILLINOIS 60201-0000	07/01/2017 - Future 02/20/2017 - Current <a href="#">View</a>
<b>Country Of Citizenship</b>		UNITED STATES	
<b>Beneficiaries Last Updated</b>		<b>Phone</b>	<b>Alternate Phone</b>
		(847) 555-1234	
<b>Invalid Address</b>		<b>Email</b>	
No		<a href="mailto:JDOE@GMAIL.COM">JDOE@GMAIL.COM</a>	

Last updated by GBOPEXTDEVUSER1 02/20/2017 02:56:36 PM



# Service and Compensation: Add Moving Expense Payment



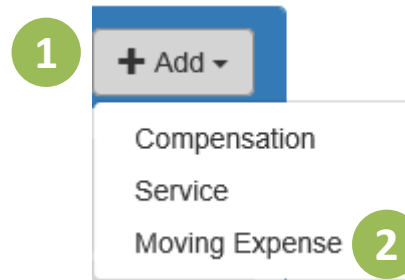
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Use the **Service and Compensation** module to enter moving expense payments for the current tax year.

## 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
Action
Refresh
+ Add

**Add Moving Expense**

Service	Service Effective Dates	Moving Expense Payment	Parsonage Value of Moving Expense Payment	Total Moving Expense Amount	Tax Year
APPT 50% LAKE MARY GRACE	08/01/2018	3 \$0	\$0	\$0	2018
APPT 50% FIRST - SANFORD	08/01/2018	\$0	\$0	\$0	2018

i Moving Expense Payments may be entered for the current tax year and service(s). Contact your Plan Sponsor Manager for other options.

Save
Cancel



# 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.*

**Reports**

Click [here](#) for more information on these and other available reports.

**Census reports**

- Active Participants [View](#)
- Retired Participants [View](#)
- Death Notifications [View](#)

**Contribution reports**

- Contribution Activity [Request](#)
- Moving Expense Payments [View](#)



**Service and Compensation** Action Refresh Add

**APPT 50%** Edit

Membership Type	Membership Conference	Effective Dates
PROVISIONAL ELDER	FLORIDA	07/01/2017

Service Type	Appointment / Hours	Employer / Organization	Responsible Conference	Effective Dates
ACTIVE	APPT 50%	LAKE MARY GRACE	FLORIDA	08/01/2018

Last updated by GBOP-TESTUSER5 09/11/2018 12:31:10 PM

**Compensation**

Effective Dates*	Cash excluding Health Care Compensation (C)*	Housing Allowance (H)	Parsonage (P)	Total Plan Compensation (C+H or C+P)	Portion of Cash Designated as Housing	Health Care Compensation
08/01/2018	\$22,500	\$0	\$5,625	<b>\$28,125</b>	\$0	\$0

Last updated by GBOP-TESTUSER5 09/11/2018 12:30:34 PM

**Moving Expense Payments** 1

Billing Month	Moving Expense Payment	Parsonage Value of Moving Expense Payment	Total Moving Expense Amount
September 2018	\$4,000	\$1,000	\$5,000

Last updated by GBOP-TESTUSER5 09/11/2018 12:31:52 PM



# 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.*

APPT 50%
LAKE MARY GRACE
FLORIDA
08/01/2018
Edit

Service and Compensation

Action
Refresh
Add

**APPT 50% Membership\***

1 - PROVISIONAL ELDER - 751 - FLORIDA - (7/1/2017 - )

**Service Type\*** ACTIVE      **Appointment / Hours\*** APPT 50%      **Employer / Organization\*** 355591 - LAKE MARY GRACE

**Effective Dates\*** 08/01/2018      **Responsible Conference\*** FLORIDA (751)

**Compensation**

Effective Dates*	Cash excluding Health Care Compensation (C)*	Housing Allowance (H)	Parsonage (P)	Total Plan Compensation (C+H or C+P)	Portion of Cash Designated as Housing	Health Care Compensation
08/01/2018	\$ 22,500	\$	<input checked="" type="checkbox"/>	\$28,125		

**Moving Expense Payments**

Billing Month	Moving Expense Payment	Parsonage Value of Moving Expense Payment	Total Moving Expense Amount
September 2018	\$4,000	\$1,000	\$5,000

**i** Moving Expense Payments may be entered for the current tax year and service(s). Contact your Plan Sponsor Manager for other options.