Wespath

BENEFITS | INVESTMENTS

CONTRIBUTION MANAGEMENT

Quick Tips

This resource is designed to help you use Contribution Management to remit contributions online for your employees.

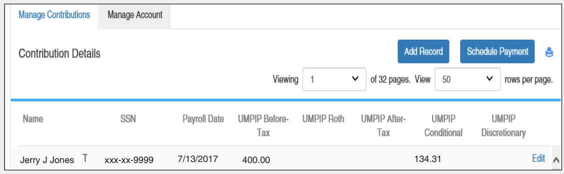
a general agency of The United Methodist Church

Contribution Management—Quick Tips

Manage Contributions

Add an Enrolled Participant to the Contribution File

- Click the "**Manage Contributions**" tab
- Select the payroll date for the file to which you want to add a participant
- Click the "**Add Record**" button
- Enter the participant's information, then click "**Submit**"



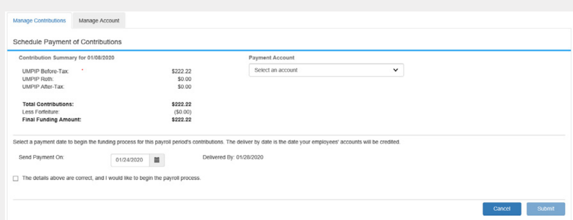
Change a Participant's Contribution Amount

- Click the "**Manage Contributions**" tab
- Select the payroll date for the file you need to update
- Find the participant's name, then click "**Edit**" at the end of the row
- Enter the contribution changes, then click "**Submit**"

Schedule a Payment

- Click the "**Manage Contributions**" tab
- Select the payroll date for the file for which you want to schedule a payment
- Click the "**Schedule Payment**" button
- Verify the contribution summary and verify bank ACH information
- If you have multiple funding accounts, select "**Payment Account**" to choose an account
- Verify the date on which you will send the payment
- Check the box to confirm that the above details are correct
- Click "**Submit**"

You will receive a message indicating that you have successfully scheduled your payment. To check the status of the payment, click the "**Manage Contributions**" tab. Your selected file should have a "**Pending**" status.

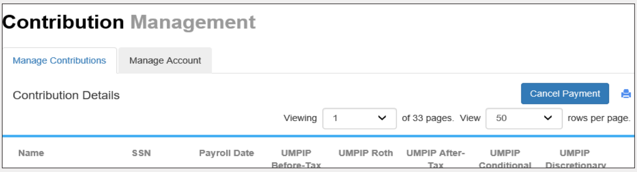


Cancel a Pending Payment*

- Click the "**Manage Contributions**" tab
- Select the payroll date for the file for which you want to cancel a pending payment (*Note: the file status should be "**pending**"*)
- Click the "**Cancel Payment**" button
- Check the box to confirm you would like to cancel the payment
- Click "**Submit**"

Contribution Management—Quick Tips

You will receive a message indicating that you have successfully cancelled your payment. To check the status of the payment, click the "**Manage Contributions**" tab—your selected file should have a "**Schedule Payment**" status.

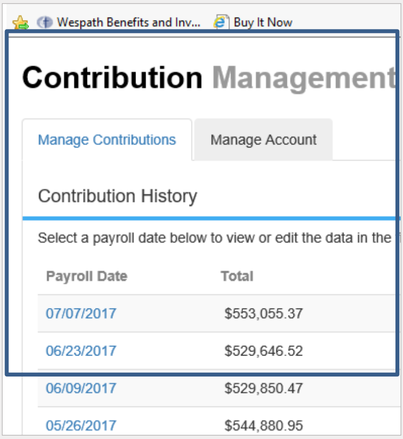


**Not available for organizations who elect the automatic funding option*

Upload a Payroll File

- Click the "**Manage Contributions**" tab
- Click the "**Upload Payroll File**" button
- Choose "**Select a file to upload**"
- Click "**Browse**" and select the file to upload
- Enter the payroll date
- Click "**Submit**"

Your file will be uploaded to **Contribution History**.



Cancel a File

- Click the "**Manage Contributions**" tab
- Find the file you would like to cancel, and click "**Cancel File**" at the end of the row
- Click "**OK**" on the pop-up message to confirm that you intend to delete the file

Your file will no longer be in **Contribution History**.

Manage Account

Update Payment Information

- Click the "**Manage Account**" tab
- Click "**Add New Account**" or "**Edit**"
- Enter the requested information in the fields (e.g., bank name and account number)
- Click "**Continue**"
- Verify the entered information is correct
- Check the box to confirm that the bank information is correct
- Click "**Submit**"

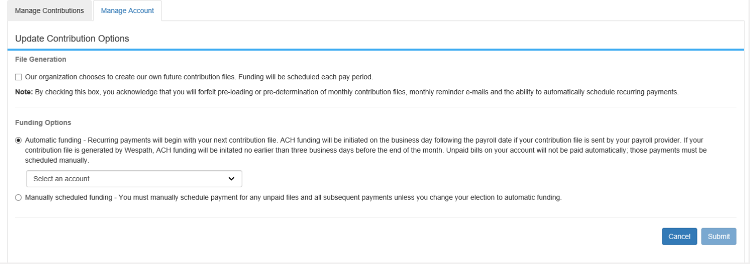
You will receive a message indicating that you have successfully updated your organization's payment information.

You may also delete bank accounts from this page if you have more than one account on file and the account you are deleting is not being used for a pending or automatic payment.

Contribution Management—Quick Tips

Manage Account

Update Contribution Options



Create Your Own Contribution Files*

- Click the "**Manage Account**" tab
- Click "**Update Contribution Options**"
- Under **File Generation**, check the box that says "**Our organization chooses to create our own future contribution files**"
- Click "**Submit**"

You will receive a message indicating that you have successfully updated your organization's contribution options.

**Not available for organizations whose contribution files are automatically generated by a payroll provider*

Funding Options

- Click the "**Manage Account**" tab
- Click "**Update Contribution Options**"
- Under **Funding Options**, select the radial button next to "**Automatic Funding**" or "**Manually scheduled funding**"
  – For "**Automatic Funding**" verify or select account
- Click "**Submit**"

You will receive a message indicating that you successfully updated your organization's contribution options.

Edit a Contribution Amount on Pending Automatic Payment Bill

1. Follow the directions under "**Funding Options**" on this page to change from "**Automatic Funding**" to "**Manually Scheduled Funding**"
2. Follow the directions on page 2 to "**Cancel a Pending Payment**" for the payment date
3. The status should now read "**Schedule Payment**" on the Manage Contributions tab
4. Click the payroll date, find the participant name and click "**Edit**" at the end of that row
5. Enter the contribution changes and click "**Submit**"
6. Click "**Schedule Payment**" button
7. Verify the Contribution Summary and verify bank ACH information
8. If you have multiple funding accounts, select "**Payment Account**" to choose an account
9. Verify the date on which you will send the payment
10. Check the box to confirm the payment details are correct, and click "**Submit**"
11. The status should now read "**Pending**" on the Manage Contributions tab
12. Follow the directions under "**Funding Options**" again to revert to "**Automatic Funding**" from "**Manually scheduled funding**"

View the account used for a pending or paid payment

- Click the "**Manage Contributions**" tab
- Select the payroll date for the file you want to view
- View "**Payment Account**" in the Contribution Summary section under contribution details

Contribution Summary

UMPIP Before-Tax:	$222.22
UMPIP Roth:	$0.00
UMPIP After-Tax:	$0.00
Total Contributions:	**$222.22**
Less Forfeiture:	($0.00)
Final Funding Amount:	**$222.22**

Payment Account:
Funding Account