I.A.T.S.E. National Benefit Funds

NAVIGATING THROUGH THE NATIONAL BENEFIT FUNDS WEBSITE

WWW.IATSENBF.ORG

Table of Contents

- Page 2 Main Landing page
- Page 4 How to register
- Page 7 Your Dashboard page
- Page 10 Account Settings & My Profile page
- Page 12 Health & Welfare CAPP screen
- Page 17 Health & Welfare coverage selection screens
- Page 19 How to view/print work history
- Page 25 Obtaining Plan documents and other forms
- Page 26 News & Announcements page
- Page 27 Website banners and their meaning
- Page 28 Contact us
- Page 29 "Help" page and examples

Once you enter <u>www.iatsenbf.org</u> you will be brought to the PUBLIC landing page.

This is the page where you will enter your username and password to access your personal web pages on the National Benefit Funds website.

At the bottom of the public landing page, you can also obtain several forms and documents relating to each of the separate Funds OR you can click on the

"Applications/Forms/Documents" link under Participant Quick Links in the middle of the page, to the right for a more detailed search.

If you do not have a username or password, then you'll need to register to use the website by clicking on the '<u>register</u>' link in the upper right of the screen, explained in more detail on the next page.



YOU WILL NEED TO REGISTER TO USE THE WEBSITE TO ACCESS INFORMATION ON ANY BENEFITS AVAILABLE TO YOU

How to register

Create Web Account	
In order to create an account, your Participant ID or last 4 digits of your SSN plus your name and date of birth must match Fund Office records. If they do not match, you will be instructed to contact the Fund Office. If you are a new participant, you must contact the Fund Office before attempting to register. For assistance you can reach us at 1-800-456- FUND (3863), psc@iatsenbf.org, or webadmin@iatsenbf.org.	<u>**Please note**</u> The following four pieces of information MUST match exactly to what the Fund Office has in its system, or registration will fail:
Choose an entity from below to create an account for Participant Local Union Payroll Company (Paying Agent) Payroll	 Last four SSN First name spelling Last name spelling
Participant ID or Last 4 SSN	Date of birth *********************************
First name: Last name: Date of Birth: 04/26/2020	Please enter all applicable information. If you receive an error message indicating that you cannot be found in our system, then you must contact the Fund's participant services center to update and/or verify the information we have in the system.
Create a Password: (min 8 characters, one uppercase letter, one lowercase letter and one number) Confirm your Password: Please select a guestion and enter an answer, which will be used if you ever forget your password:	You can call: 800-456-3863 (FUND) You can email: <u>psc@iatsenbf.org</u>
Questions: Security Questions Answer: Security Check: I'm not a robot	Please be sure to write down your username and password. If you lose or forget your username and/or password, you can also reach out to the participant services center at the phone or email above.
Reset Submit	5

"TERMS AND CONDITIONS"

Terms and Conditions

Text Size: 🛕 🙏 🔔

To continue to use this site, please read the Terms & Conditions below, and complete the form to confirm your acceptance.

Terms and Conditions of Use

Terms of Use

Thank you for visiting the IATSE National Benefit Funds website, a service of IATSE National Benefit Funds. Please read these Terms of Use carefully before using this website. By accessing this website in any manner (whether automated or otherwise), you agree to be bound by these Terms of Use, and any additional terms and conditions that are referenced below or otherwise may apply to specific areas of this site. You represent that you are legally able to accept these Terms of Use, and affirm that you are of legal age to form a binding contract. If you do not agree to these Terms of Use, you may not use this site. We reserve the right to change these Terms of Use at any time. Such changes will be effective when posted. By continuing to use the site after we post any such changes, you accept the Terms of Use as modified. Rules of Conduct There are a few rules of conduct that you are required to follow when you use this website: • Do not "harvest" (or collect) information from the site using an automated software tool or manually on a mass basis (unless we have given you separate written permission to do so). This includes, for example, information about the services available on the site. • Do not use automated means to access the site, or gain unauthorized access to the site or to any account or computer system connected to the site. • Do not "stream catch" (download, store or transmit copies of streamed content). • Do not obtain, or attempt to obtain, access to areas of the site or our

Accept Terms & Conditions of Use

Submit

Immediately following registration or login, you will need to click the box on the "Terms and Conditions" page. This page will come up each time you log in.

HIPAA Privacy Notice | Privacy Policy | Terms of Use | Contact Us | Sitemap |

Taft-Hartley Web Design by Polar Design © 2014 I.A.T.S.E. National Benefit Funds YOUR DASHBOARD IS YOUR MAIN LANDING PAGE WHERE YOU CAN VIEW THE DETAILS OF HEALTH, ANNUITY, PENSION AND/OR VACATION FUND BENEFITS IN YOUR NAME

Your Dashboard



This pages Burger page.

This is the landing page to access information on your Health & Welfare, Annuity, Pension and/or Vacation Fund benefits.

For each Fund listed on your Dashboard page, you can:

- enroll in health coverage
- check your current health coverage
- submit qualified medical expenses for reimbursement
- view your contribution history for each Fund
- view/update your dependents
- view/update your beneficiary(ies)
- request a Medical ID card
- review your pension days credited
- request a pension estimate
- request a pension or annuity application for benefits
- check your Annuity Fund balance and link directly to the Wells Fargo website for a more detailed look at your Annuity Fund account
- make coverage payments

You will also notice that there is a "Post-it note" icon in the middle of the page.

Clicking on this Post-it note, will bring you to a message center (see illustration to the right).

Here is where you have access to documents that have been mailed to you such as your quarterly statements and other important documents and/or notices.

Each document will have a link within the message. Click on that link to view and/or download each document to your personal device.

My Dashboard

Archived General Messages

This screen contains a repository of messages you've previously viewed which are stored here for historic reference

Date	Message
02/29/2020	Coverage selection/payment (if applicable) has been completed. Your coverage selection of C3 Family will be officially posted at the close of coverage processing period.
02/15/2020	Your National Health & Welfare Fund Plan C CAPP account statement for the 04/01/2020 quarter has been generated by the Fund Office. Click < <u>here</u> > to view the statement. Your coverage selection and any applicable payment is due no later than 12/16/2019.
02/11/2020	Your 1095B form for the coverage year 2019 has been generated by the fund office. Click $<\!\! here\!\!>$ to view the form.
12/09/2019	Coverage selection/payment (if applicable) has been completed. Your coverage selection of C3 Family will be officially posted at the close of coverage processing period.
11/16/2019	Your National Health & Welfare Fund Plan C CAPP account statement for the 01/01/2020 quarter has been generated by the Fund Office. Click < <u>here</u> > to view the statement. Your coverage selection and any applicable payment is due no later than 12/16/2019
09/04/2019	Coverage selection/payment (if applicable) has been completed. Your coverage selection of C3 Family will be officially posted at the close of coverage processing period.
08/15/2019	Your National Health & Welfare Fund Plan C CAPP account statement for the 10/01/2019 quarter has been generated by the Fund Office. Click < <u>here</u> > to view the statement. Your coverage selection and any applicable payment is due no later than 09/21/2019.

HERE YOU CAN CHANGE YOUR WEBSITE SETTINGS

AS WELL AS

UPDATE YOUR PERSONAL INFORMATION

"Account Settings"

"My Profile"



Account Settings

- you can change your username
- You can change your password
- you can change or update your security question and/or answer

My Profile

- update your personal information such as name, date of birth, marital

status

- you can update your marriage certificate or divorce decree
- primary address information
- personal contact phone or e-mail

CHECK YOUR CAPP BALANCE

CHECK YOUR COVERAGE HISTORY

VIEW/DOWNLOAD A COPY OF YOUR CURRENT/PAST STATEMENTS

VIEW YOUR PAST PAYMENT HISTORY

Health & Welfare

Health & Welfare	
Current Coverage 04/01/2020 - 06/30/2020 Coverage Type Plan C3 Family	
Upcoming Coverage 07/01/2020 - 09/30/2020 Coverage Type To Be Determined	
\$752.00	
View Health Contributions History	
Dependent / Beneficiary Information <u>My COBRA Payment History</u> <u>Request Coverage ID Card(s)</u>	

To view your current coverage, CAPP balance and any claim amounts paid, click on the "Current Coverage" link.

The Health & Welfare Plan C contribution summary screen will slide in.

Here you will see what level of coverage you are enrolled in.

You can click to see your dependents on file as well as add new dependents.

Please note: a dependent will not be added unless the proof of relationship document is also uploaded:

- birth certificate for children

 birth certificate or hospital discharge papers for newborns added within 60 days of birth
 <u>marriage certificate for</u> spouse

Click on My statements/co-payment history to obtain current or past statements as well as a history of payments you've submitted to the Fund for health coverage.



In the upper right of the Health & Welfare panel you will see "<u>Previous Period</u>" and "<u>Next Period</u>" buttons.

Previous Period

Click on this button and you will be taken to the previous coverage period. To the left of the screen, you will see the coverage period and level of coverage for that period. You can keep clicking the *"previous period"* button to see all prior information as described below.

To the right, you can click on the "<u>total</u> <u>contributions</u>" link to view employer contributions credited to your CAPP account and applicable to that health coverage period.

You can also click on the "<u>Medical</u> <u>Reimbursement</u>" amount link if there were claims "paid" in this period that affected your total CAPP balance.

Next Period

by clicking on the "Next Period" button, you can advance the screen to the next applicable quarter and see what was credited to your CAPP account for coverage period after the current period. If there are employer contributions listed, you can click on the dollar amount link to see what employers have contributed to your CAPP account for that upcoming coverage quarter.



<u>"Benefit Details" link</u>

ANNE:

The page is not consistent. Sometimes it shows a listing of each carrier, sometimes it doesn't

we should also see if they can link the SBC associated with their level of coverage for this period.....to this page so when they click on the "Benefit Details" they can see a summary of what their current coverage offers.

Maybe also change the button to "Benefit Summary"

if not, I will work with Patricia/Hema to have this link more consistent amongst all levels of coverage



ENROLLING IN COVERAGE OR CONTINUING YOUR CURRENT COVERAGE

Health & Welfare





will see a blue box called: <u>"Make Coverage Selection/Payment"</u> appearing under the "<u>Upcoming Coverage</u>" heading as seen in the example to the left.

Once you click on that button, you will see a listing of available coverage options that are available to you for the upcoming coverage quarter based upon your current level of coverage. You can remain enrolled in your current coverage option OR you have the option of downgrading your level of coverage. In each box, you will also see the amount due to either continue enrollment in your current coverage or any available downgrade option.

Upgrade options are not available on the website except during the Open Enrollment period (mid-November to December 15) via the website.

If you need to upgrade your coverage outside of the Open Enrollment period due to a qualifying event (birth of child, marriage, divorce of loss of other coverage) please contact the Fund Office directly at psc@iatsenbf.org or call 800-456-3863 and speak to a representative. WORK HISTORY CAN ONLY BE PRINTED IN TWO-YEAR INCREMENTS

PLEASE CHECK YOUR WORK HISTORY PERIODICALLY

How to view/print your work history

How to obtain your work/contribution history blue section of each panel. Click on the link and a box will slide in so you can enter your search parameters.

My Dashboard	Archived 1	Messages
Current Coverage 04/01/2020 - 06/30/2020 Coverage Type Plan C3 Family Ubcoming Coverage	Annuity Wells Faroo Balance \$12508.06 as of 2020-04-24 My Current Age 56	Pension Reporting Period: 01/01/2020 - 12/31/2020 Plan C: Days Worked 8 Days Last Reporting Period:
07/01/2020 - 09/30/2020 Coverage Type To Be Determined Total Contributions Received: \$752.00	Most Recent Contribution Received \$272.00 as of 02/10/2020	01/01/2020 - 12/31/2020 Plan C: Days Worked 8 Days
View Health Contributions History	View Annuity Contribution History	View Pension Contribution History

How to obtain your work/contribution history

You can select "All", or click in the box and all the employers you've worked for will be available for you to select 1 or more employers per report, then hit "Search" when you are ready to receive your report. <u>Please note: History can only be given in two-year increments at a time</u>

Health Contribution History Image: This page allows you to look for specific employer health contributions received on your behalf based on different search parameters.	Health Contribution History This page allows you to look for specific employer health contributions received on your behalf based on different search parameters.
Filters View Work History for: Current Year Employer(s): ALL Production(s): Eund(s):	Filters View Work History for: Current Year Employer(s): Production(s): ALL Fund(s): ALL End(s): Current Year
2	dear Apply



The report to the left is an example of a summary of work history.

If you click on the "+" sign, it will expand that particular work history detail.

On the next page, you can see the detail for the health contributions submitted for the 2019 plan year.

3E Local	01/0	1/2019 - 12/31/2019			
Work Period	Receipt Date 🥑	Days Reported		Fund	Contributions(\$)
12/01/2019-12/31/2019	01/13/2020	9	${}^{\odot}$	Welfare Plan C	846.00
11/01/2019-11/30/2019	12/18/2019	9	${}^{\odot}$	Welfare Plan C	846.00
10/01/2019-10/31/2019	11/18/2019	9	${}^{\odot}$	Welfare Plan C	846.00
09/01/2019-09/30/2019	10/18/2019	9	${}^{\odot}$	Welfare Plan C	846.00
08/01/2019-08/31/2019	09/12/2019	9	${}^{\odot}$	Welfare Plan C	846.00
07/01/2019-07/31/2019	08/15/2019	9	${}^{\odot}$	Welfare Plan C	810.00
06/01/2019-06/30/2019	07/23/2019	8	${}^{\odot}$	Welfare Plan C	720.00
05/01/2019-05/31/2019	06/17/2019	8	${}^{\odot}$	Welfare Plan C	720.00
04/01/2019-04/30/2019	05/14/2019	8	${}^{\odot}$	Welfare Plan C	720.00
03/01/2019-03/31/2019	04/18/2019	8	${}^{\bigotimes}$	Welfare Plan C	720.00
02/01/2019-02/28/2019	03/15/2019	8	${}^{\textcircled{\state{0.5}}}$	Welfare Plan C	720.00
01/01/2019-01/31/2019	02/19/2019	8	${}^{\odot}$	Welfare Plan C	720.00
				Welfare P	lan C 9360.00

This is how a detail report of contributions would look once you click on the "+" sign.

It is always advisable that you check your work history often to ensure you are receiving all contributions you are entitled to.

Please note: most employers are not required to submit contributions to the NBF until the 10th or the 15th of the month following the month in which you worked.

Once received, it can take from 2-3 weeks for the NBF to process all contributions.

Plan A contributions are credited based upon work dates.

Plan C contributions are always credited with the date they were received, regardless of when posted.

Total Contributions for (2019)

Welfare Plan C 9360.00

OBTAINING PLAN DOCUMENTS AND FORMS NEWS & ANNOUNCEMENTS WEBSITE BANNERS CONTACT US "HELP" PAGE

Other, equally important, areas of the website

Obtaining Plan documents and other forms Participant Quick-Links My Dashboard My Work History Applications / orms / Documents

Click on: Applications/Forms/Documents A box will slide in showing all Funds available to search for documents and forms

Get ADOBE* READER* **Applications, Forms & Documents** All Funds booklets, documents and applications are available on this page for viewing and/or downloading. Health & Welfare Annuity Pension + Vacation Booklets/Documents Contracts & Contributions + Agreements & Declarations of Trusts + General



<u>News &</u> <u>Announcements</u>

News & Announcements

IMPORTANT COVID-19 NEWS

• Due to state and federal guidelines regarding the COVID-19 crisis, the Fund Office is now following such guidelines and is currently closed until further notice.

During the COVID-19 crisis, communicating with the Fund Office via the website or through email will temporarily be the only way that we can respond to you until such time that we reopen. Click <u>here</u> to view the email addresses that will be monitored during this time.

• Important Notice for Plan C Health & Welfare Participants The Fund Office does not have the ability to print and mail coverage change notices at this time. Please login to your account to view the status of your April 1,2020 enrollment.

If you need to appeal a loss of coverage through the IATSE National Health & Welfare Fund, please upload your appeal and email it

to appeals@iatsenbf.org. If you have already submitted an appeal via mail to the Fund Office, you can resubmit the appeal by uploading your appeal and emailing it to appeals@iatsenbf.org.

• IATSE National Health & Welfare Participants:

If you are submitting medical claims for reimbursement on our website while the Fund Office is closed, please login to your account and navigate to the MRP section where you can submit a claim and switch your payment method to direct deposit. Direct deposit is currently the only way for us to send a payment until the Office reopens.

If you leave the payment method as a check, the Fund Office will be unable to get that payment to you for several weeks.

If you have any questions or concerns about this, please email claims@iatsenbf.org.

• In light of the COVID-19 crisis and the economic drain on our participants, the Fund Office will be issuing Vacation Checks to those participants eligible for one, a month early. Checks will be mailed or direct deposited on April 1st instead of early May. We hope this eases some burdens for many of you experiencing hardships due to work shutdown!

Website Banners

Each Banner is updated with current information as well as links to webinars, notices and other important information. You can click on "Home" from your main dashboard page to view the various web banners posted



your health needs. Click the link to each carrier flyer for more information on what each app can do and visit the Google Play store or the App Store to download each app.

Empire BCBS ; CVS Health ; Delta Dental ; Davis Vision ; MetLife

* 8/2020 - Empire BlueCross BlueShield has a new app "Sydney" that will replace the "Empire Anywhere" application that you may currently be using. Home

Contact Us Help

Contact Us

IATSE National Benefit Funds Office 417 Fifth Avenue 3rd Floor New York, NY 10016-2204 <u>Office Hours</u> Monday - Thursday 9:00 AM - 5:00 PM EST/DST Friday 9:00 AM - 4:30 PM EST/DST

Email Addresses

For verification purposes, please include your name, date of birth and mailing address in your email. Also indicate if your email address can be added to your internal system profile.

Participant Services: psc@iatsenbf.org MRP Claims Division: claims@iatsenbf.org Retirement Services - Annuity Division: annuity@iatsenbf.org Retirement Services - Pension Division: pension@iatsenbf.org Webmaster: webadmin@iatsenbf.org

Main Numbers

Main Number: 212-580-9092 Toll Free Number: 800-456 FUND(3863) Main Fax Number: 212-787-3607 Benefits Fax Number: 646-783-7650 Contracts & Contributions Fax Number: 212-792-8322 Finance Fax Number: 212-792-8323 Pension Fax Number: 212-792-8323 Executive Director Fax Number: 212-792-8320



Contact Us

HELP

BY CLICKING ON THE "HELP" ICON ON THE BLUE BANNER, YOU WILL BE BROUGHT TO SEVERAL PAGES THAT WILL WALK YOU THROUGH, STEP BY STEP, ON HOW TO PERFORM CERTAIN FUNCTIONS......TAKE A LOOK.....

SOME EXAMPLES ARE BELOW



Instructions for printing a "Member Work history" report

- Go to: <u>www.iatsenbf.org</u>
- Log into your Local portal account
- Click the box to accept terms of use
- Under the 2nd panel, "About your Members" select:
 - Member work history
 - Enter the desired work period (only in two-year increments)
 - If you know the employer, enter in the next box OR leave at "ALL" for all Employers
 - If you know the production, <u>enter in the next box OR leave at "All" for all</u> productions.
 - If you know the payor, enter in the next box OR leave at "All" for all payors.
 - Enter the "first name"
 - Enter the "last name"
 - If you know the SSN or NBF ID, enter it in the next box
 - If you need the report for multiple Funds, click the "Fund(s)" box and a dropdown box will appeal with all applicable funds. Click on those that apply OR Just leave "All" for all funds reporting

Click Submit

HELP



To select your coverage option, please follow the directions below:

- Login to your account
- On the Health & Welfare panel of the Dashboard, click on blue button "Make Coverage Selection/Payment"
- A box will slide in with all the options available to you for enrollment. In each box there will also be a dollar amount. This is the amount that you need to copay if you select that coverage option.
- If the amount is zero, that is an indication you have enough in your CAPP account to cover the full premium cost of that coverage option without having to submit any additional co-payment.
- Click on the "Select this coverage" box that represents your coverage choice.
- If a payment is due, you will be brought to a payment screen to enter your Credit Card information Visa and MasterCard only
- You will receive a confirmation immediately after clicking the box that your selection has been submitted

HELP

How to Upload a claim through the website at www.iatsenbf.org

- Login to your website account
- Under the Health & Welfare Panel, find and click the box:



• Under the "New Claims" section (upper left of screen) click on:

Submit a New Claim

- Click the box in the lower left of the screen to accept the "Certification and Conditions of Reimbursement" agreement
- Click on your name or the dependent whose claim you are now submitted for reimbursement. • Only 1 dependent can be uploaded per claim
 - Then click "Step 2" in the lower right of the screen
- Verify the mailing address is correct and/or switch to direct deposit
 - If switching to direct deposit, you must have already submitted your bank account information prior to this step
 - Then click "Step 3" in the lower right of the screen
- Click on "Browse" button to find, in your computer, the documents you wish to upload
 Click on each document you wish to upload
- When complete with your document uploads, click on "Submit Claim" in the lower right of the screen
- Continue this process for each dependent you have claims you wish to submit for reim bursement

Instructions for viewing a Submitted Claim Status

- Log into your web account and click on "MRP History/New Claim" button, the MRP claims screen will slide in.
- Click on "Search Claims History" at the bottom of the screen, another screen will slide in.
- Click on "Search" in the lower right without changing anything in the screen itself, another screen will slide in showing all the claims paid.
- In this screen you will see a history of paid/unpaid claims.
- Click on any "paperclip" in the last column, an EOB will pop up showing him what was paid for that claim.
 - The EOB document will have details of what was paid and what was not paid on the claim with a reason why if not paid.
- Click on any "paperclip" in the "Claim's Documents" column to see the actual claim you submitted.



HELP