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 www.iatsenbf.org 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 '***register***' 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

Please note

The following four pieces of information MUST match exactly to what the Fund Office has in its system, or registration will fail:

- **Last four SSN**
- **First name spelling**
- **Last name spelling**
- **Date of birth**

* * * * * * * *

- **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.**

You can call: **800-456-3863 (FUND)**

You can email: psc@iatsenbf.org

- **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.**

“TERMS AND CONDITIONS”

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.

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

YOUR "DASHBOARD" PAGE

This page is your personal "Dashboard" 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:

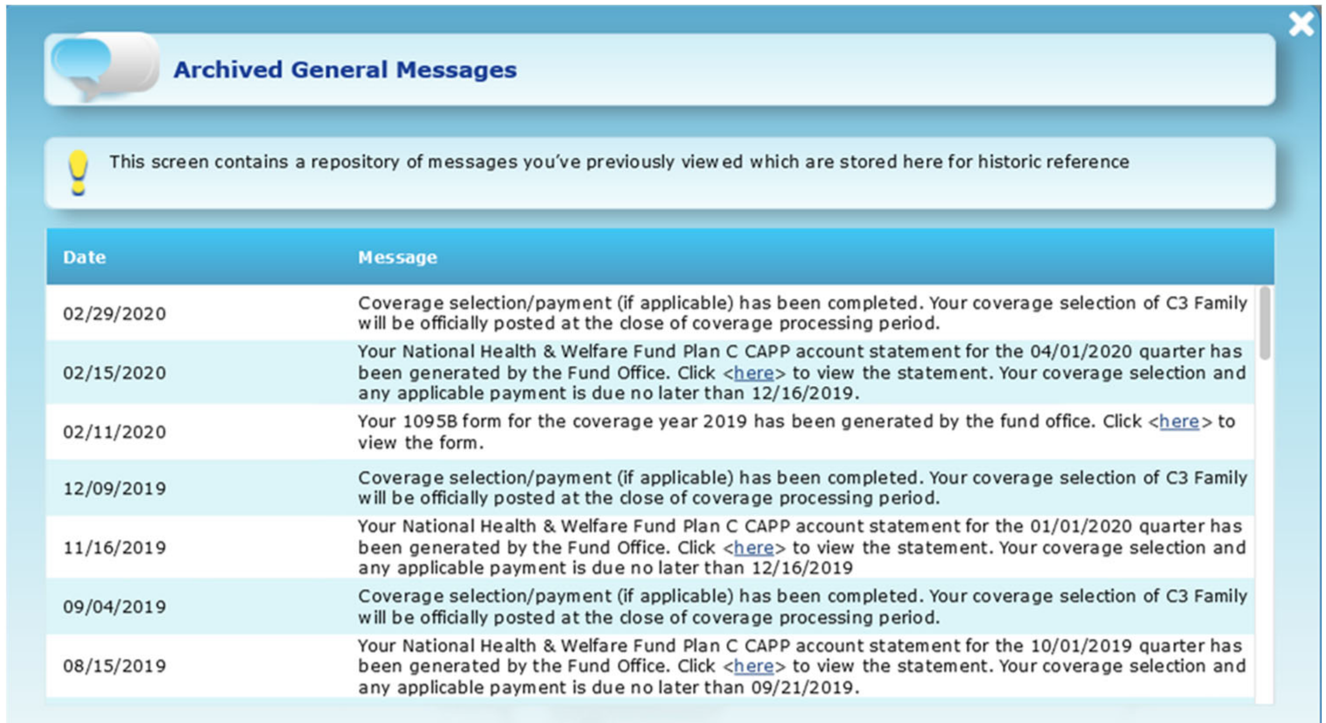
- enroll in health coverage
- check your current health coverage
- submit qualified medical expenses for reimbursement
- view your contribution history for each Fund
- view/update your dependents
- view/update your beneficiary(ies)
- request a Medical ID card
- review your pension days credited
- request 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.



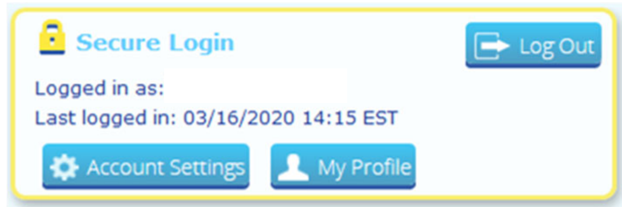
HERE YOU CAN CHANGE YOUR WEBSITE SETTINGS

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

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
- marriage certificate for 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 ***"Previous Period"*** and ***"Next Period"*** 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 "***total contributions***" link to view employer contributions credited to your CAPP account and applicable to that health coverage period.

You can also click on the "***Medical Reimbursement***" 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.

“Benefit Details” link

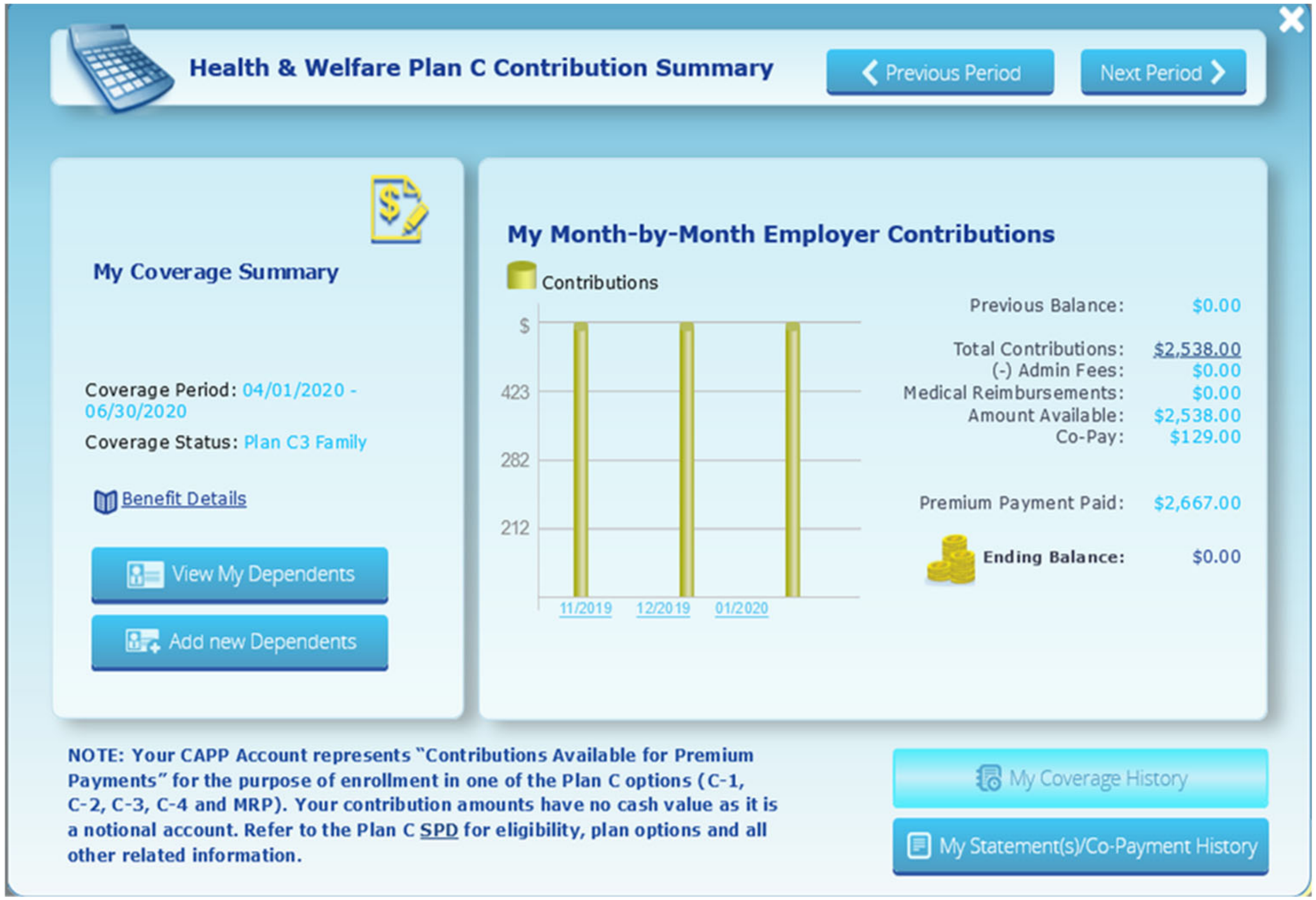
ANNE:

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.

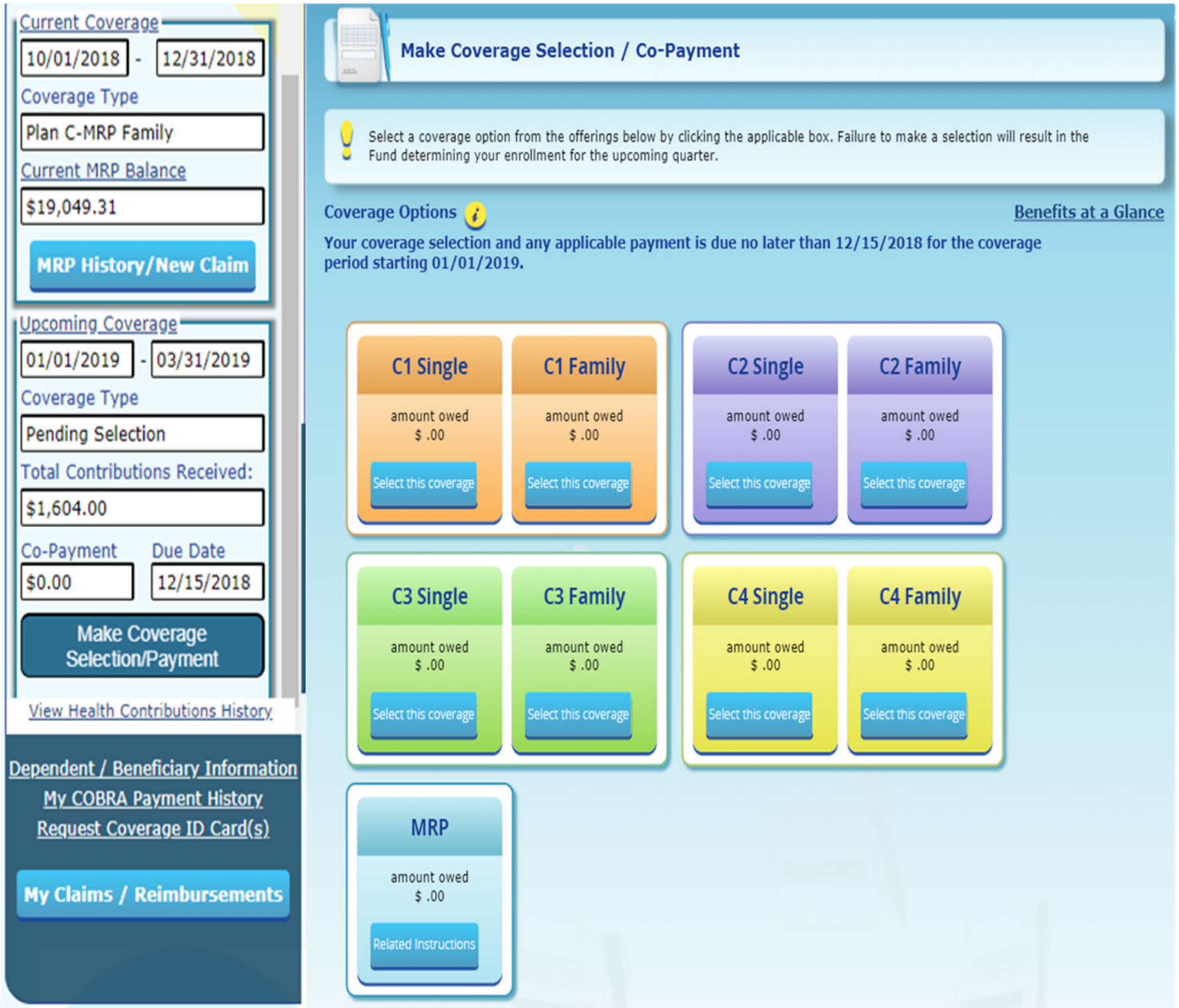
Maybe also change the button to “Benefit Summary”

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:
“Make Coverage Selection/Payment”
appearing under the “Upcoming Coverage” 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.

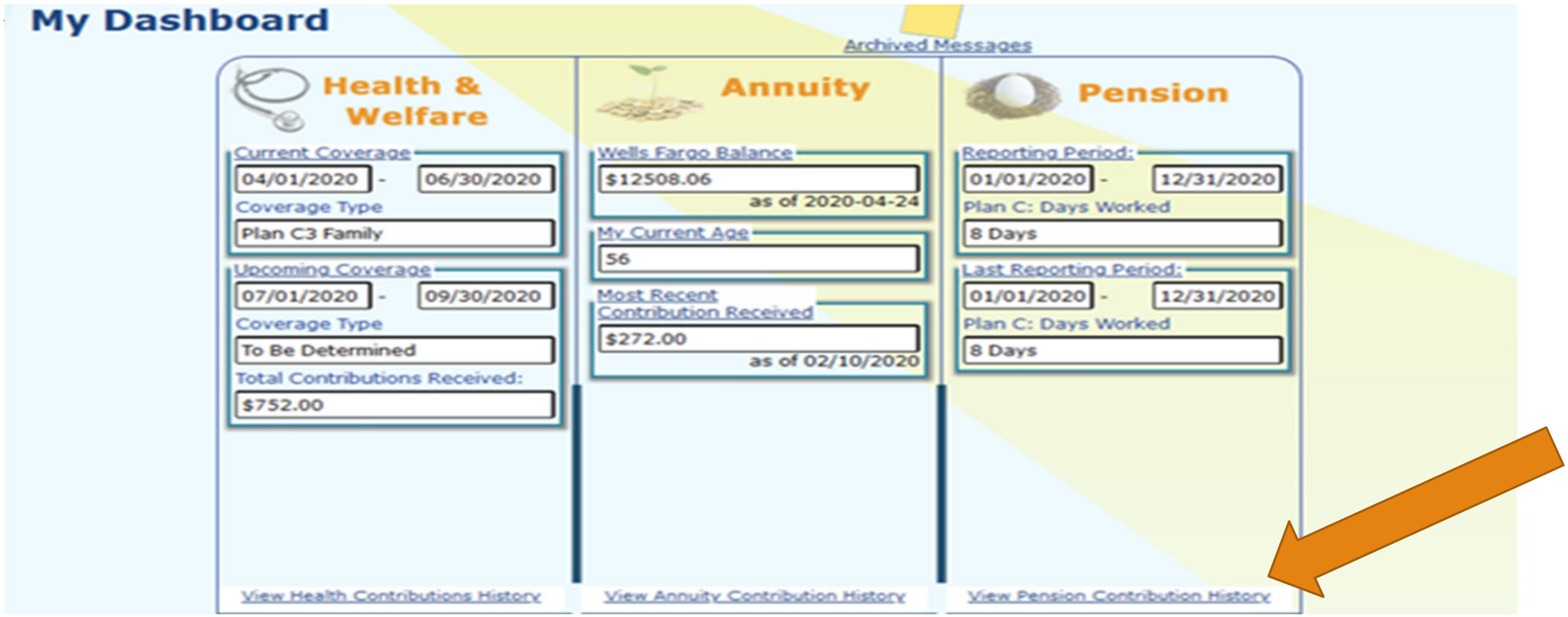
WORK HISTORY CAN ONLY BE PRINTED IN TWO-YEAR INCREMENTS

PLEASE CHECK YOUR WORK HISTORY PERIODICALLY

How to view/print your work history

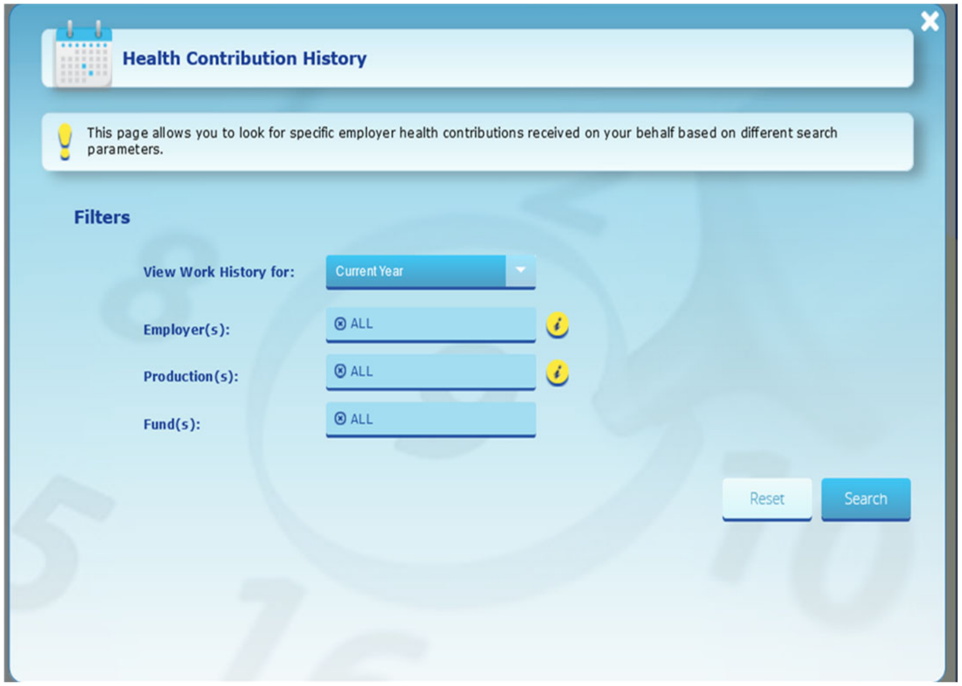
How to obtain your work/contribution history

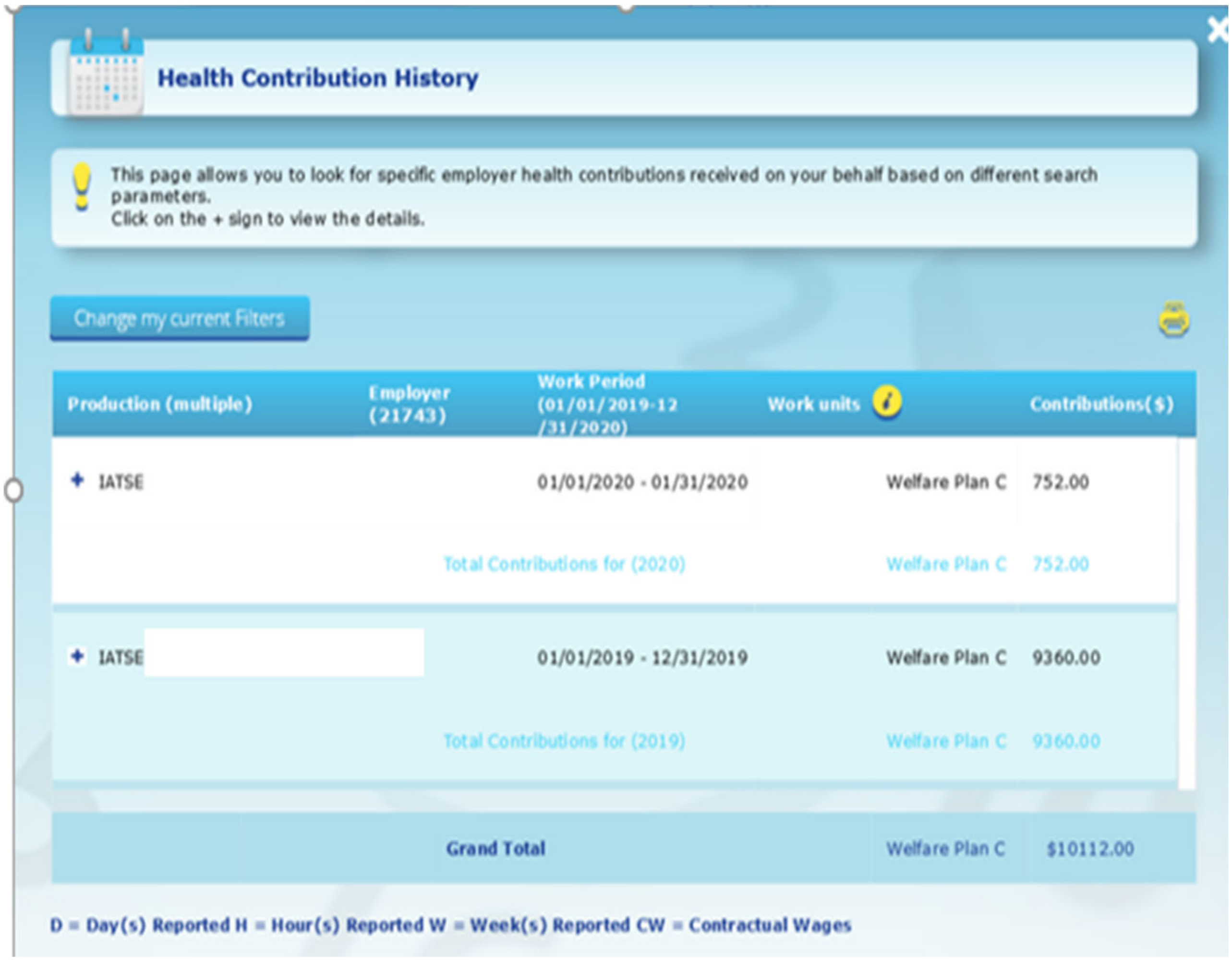
In each panel, there is a link to "view *{fund name}* contribution history" found immediately above the blue section of each panel. Click on the link and a box will slide in so you can enter your search parameters.



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.
Please note: History can only be given in two-year increments at a time





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.

IATSE Local 01/01/2019 - 12/31/2019

Work Period	Receipt Date	Days Reported	Fund	Contributions($)
12/01/2019-12/31/2019	01/13/2020	9	Welfare Plan C	846.00
11/01/2019-11/30/2019	12/18/2019	9	Welfare Plan C	846.00
10/01/2019-10/31/2019	11/18/2019	9	Welfare Plan C	846.00
09/01/2019-09/30/2019	10/18/2019	9	Welfare Plan C	846.00
08/01/2019-08/31/2019	09/12/2019	9	Welfare Plan C	846.00
07/01/2019-07/31/2019	08/15/2019	9	Welfare Plan C	810.00
06/01/2019-06/30/2019	07/23/2019	8	Welfare Plan C	720.00
05/01/2019-05/31/2019	06/17/2019	8	Welfare Plan C	720.00
04/01/2019-04/30/2019	05/14/2019	8	Welfare Plan C	720.00
03/01/2019-03/31/2019	04/18/2019	8	Welfare Plan C	720.00
02/01/2019-02/28/2019	03/15/2019	8	Welfare Plan C	720.00
01/01/2019-01/31/2019	02/19/2019	8	Welfare Plan C	720.00

Welfare Plan C 9360.00

Total Contributions for (2019) Welfare Plan 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.

OBTAINING PLAN DOCUMENTS AND FORMS

NEWS & ANNOUNCEMENTS

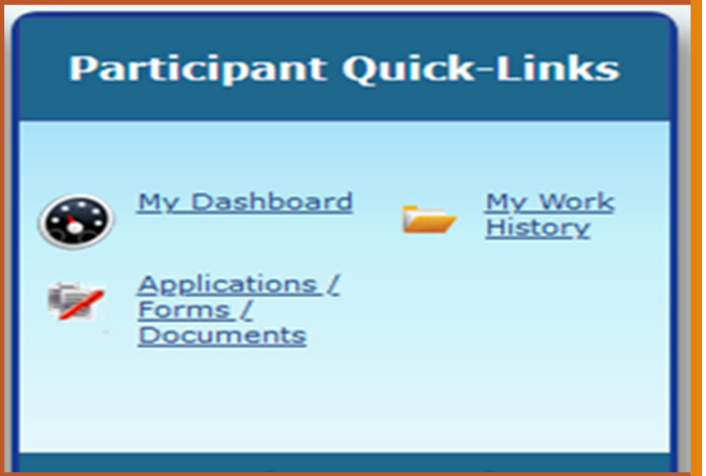
WEBSITE BANNERS

CONTACT US

“HELP” PAGE

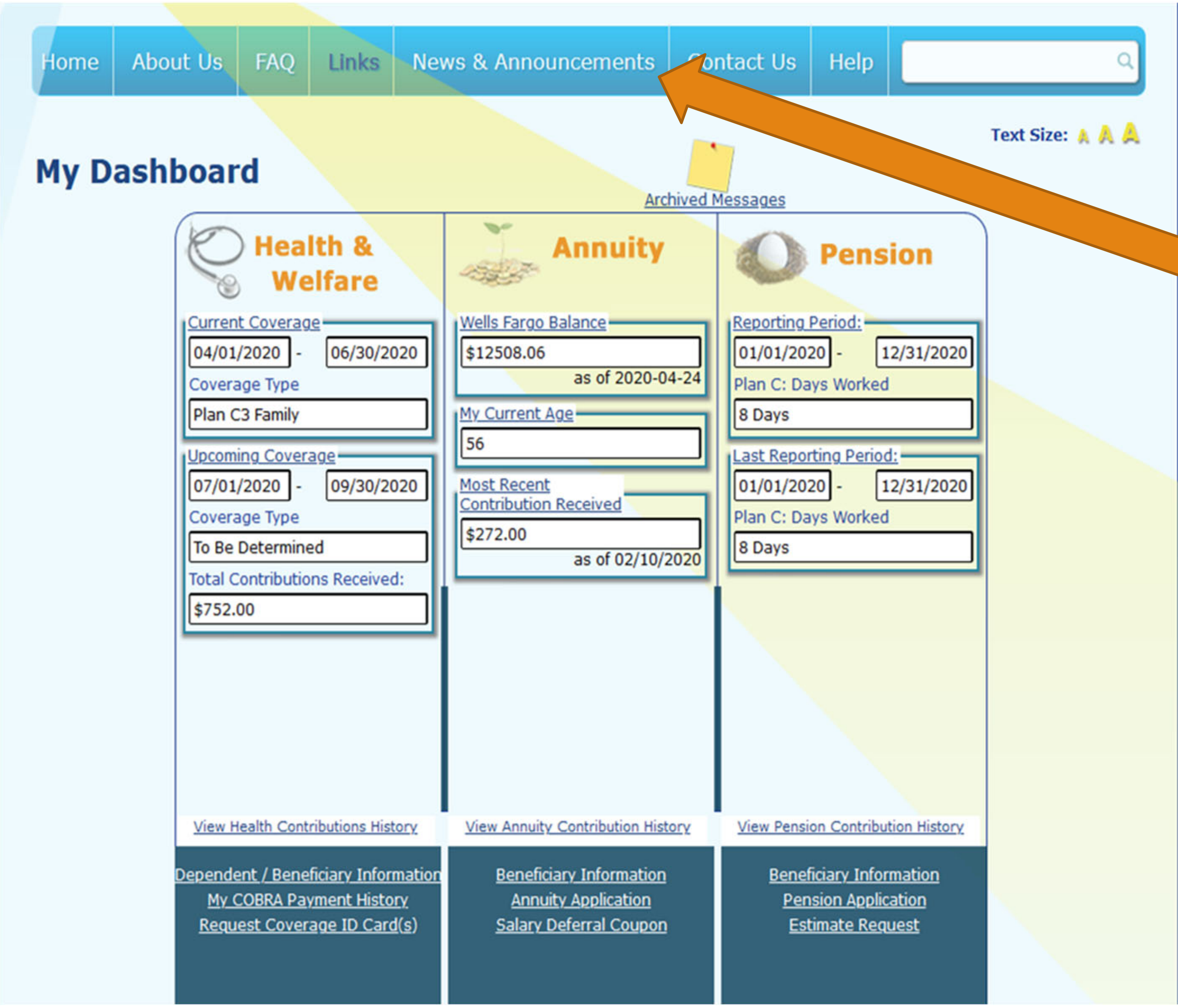
Other, equally important, areas of the website

Obtaining Plan documents and other forms



Click on: Applications/Forms/Documents

A box will slide in showing all Funds available to search for documents and forms



News & Announcements

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 here 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.

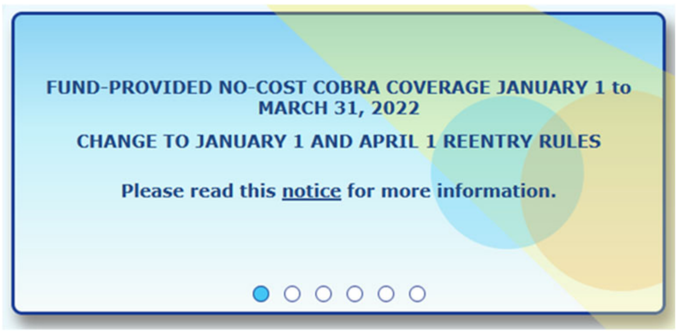
  If you leave the payment method as a check, the Fund Office will be unable to get that payment to you for several weeks.

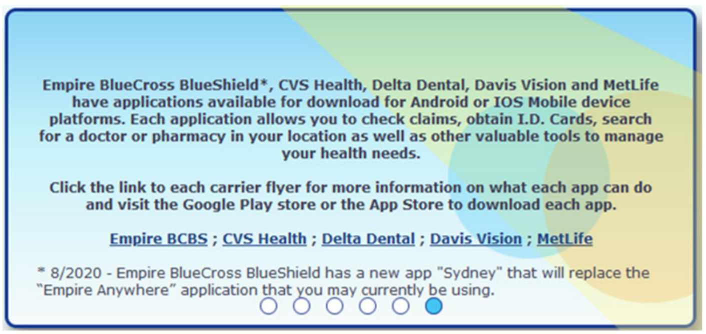
  If you have any questions or concerns about this, please email claims@iatsenbf.org.

- 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.
<u>You can click on “Home” from your main dashboard page to view the various web banners posted</u>





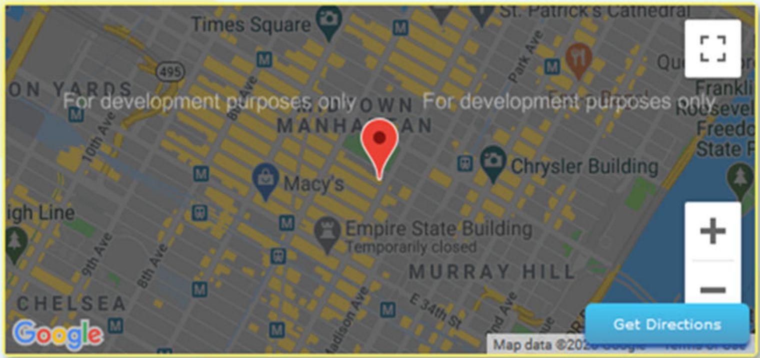
Home
Contact Us
Help

Contact Us

IATSE National Benefit Funds Office
417 Fifth Avenue
3rd Floor
New York, NY 10016-2204
Office Hours
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: 212-792-8321
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

HELP

Instructions for printing a "Member Work history" report

- Go to: www.iatsenbf.org
- 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, enter in the next box OR leave at "All" for all 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 drop-down 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 co-pay 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:

MRP History / New Claim

- 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 reimbursement

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 "Claims Documents" column to see the actual claim you submitted.