SAG·AFTRA
HEALTH PLAN

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www.sagaftraplans.org/health

Contributions Manager User Guide

This guide provides step-by-step instructions for submitting earnings and reports using the Contributions Manager. If you need assistance, please email us or call (818) 973-4472, Monday through Friday between the hours of 8:30 a.m. - 4:30 p.m. PST.

Registering

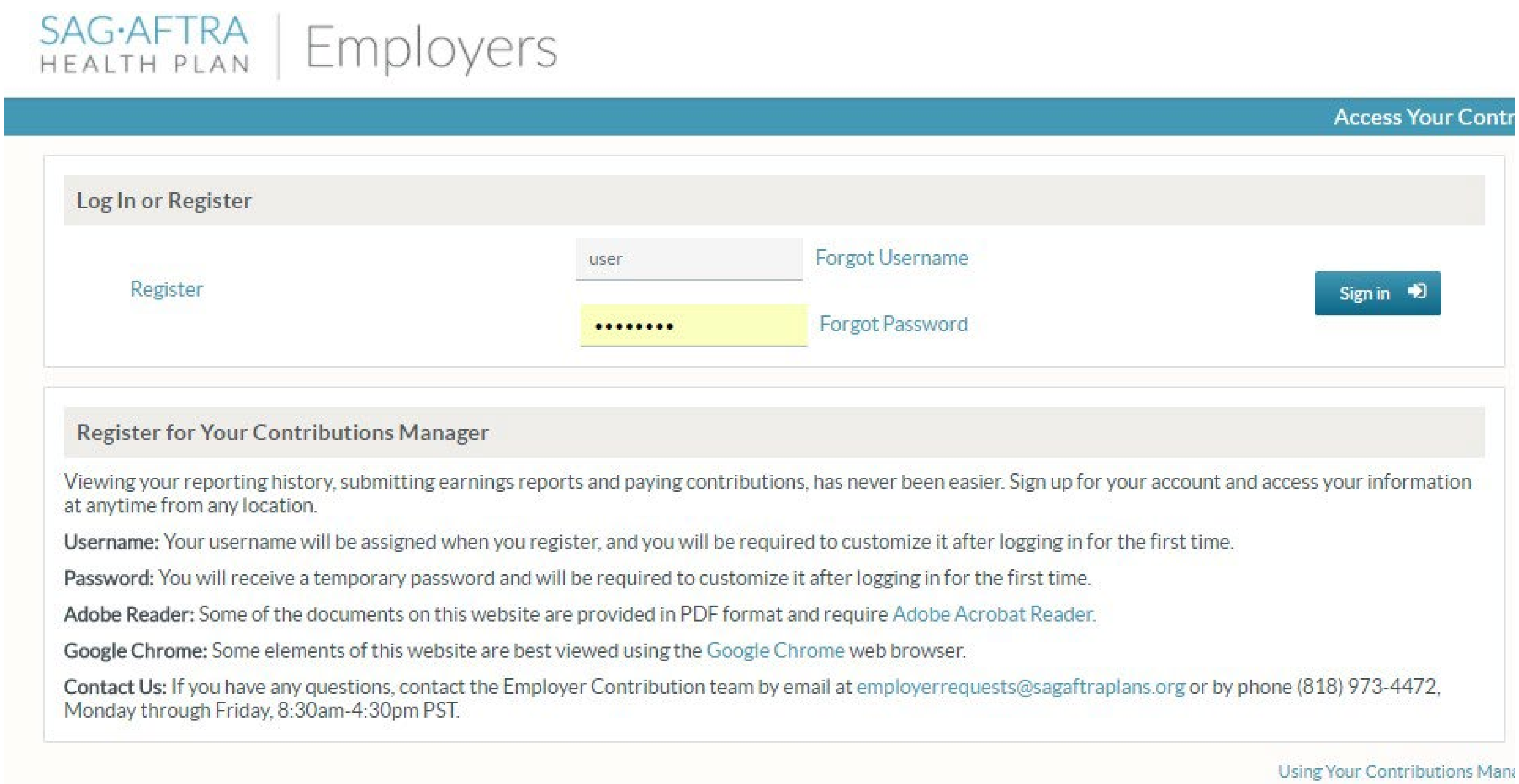
Before you begin, you will need your Plan code. If you do not have a Plan code, please request one through the Contributions Manager or by calling (818) 973-4472.

Once you have a Plan Code:

1. Visit the Contributions Manager at https://my.sagaftraplans.org/employers/.
2. Select **Register**.
3. Read and accept the **Terms of Use/Disclaimer** by selecting **I agree**.
4. Enter your company and personal information. **Note:** Each employee requiring access to the Contributions Manager will need to register independently but will use the same Plan code.
5. Select **Continue**.
6. On the next page, review the summary of the information you have entered. If you've made a mistake, select **Review** to go back to the previous page. If your information is accurate, select **Confirm**.
7. You will receive an email confirmation from the Contributions Management team within two business days with the next steps to complete the registration process.

Getting Started

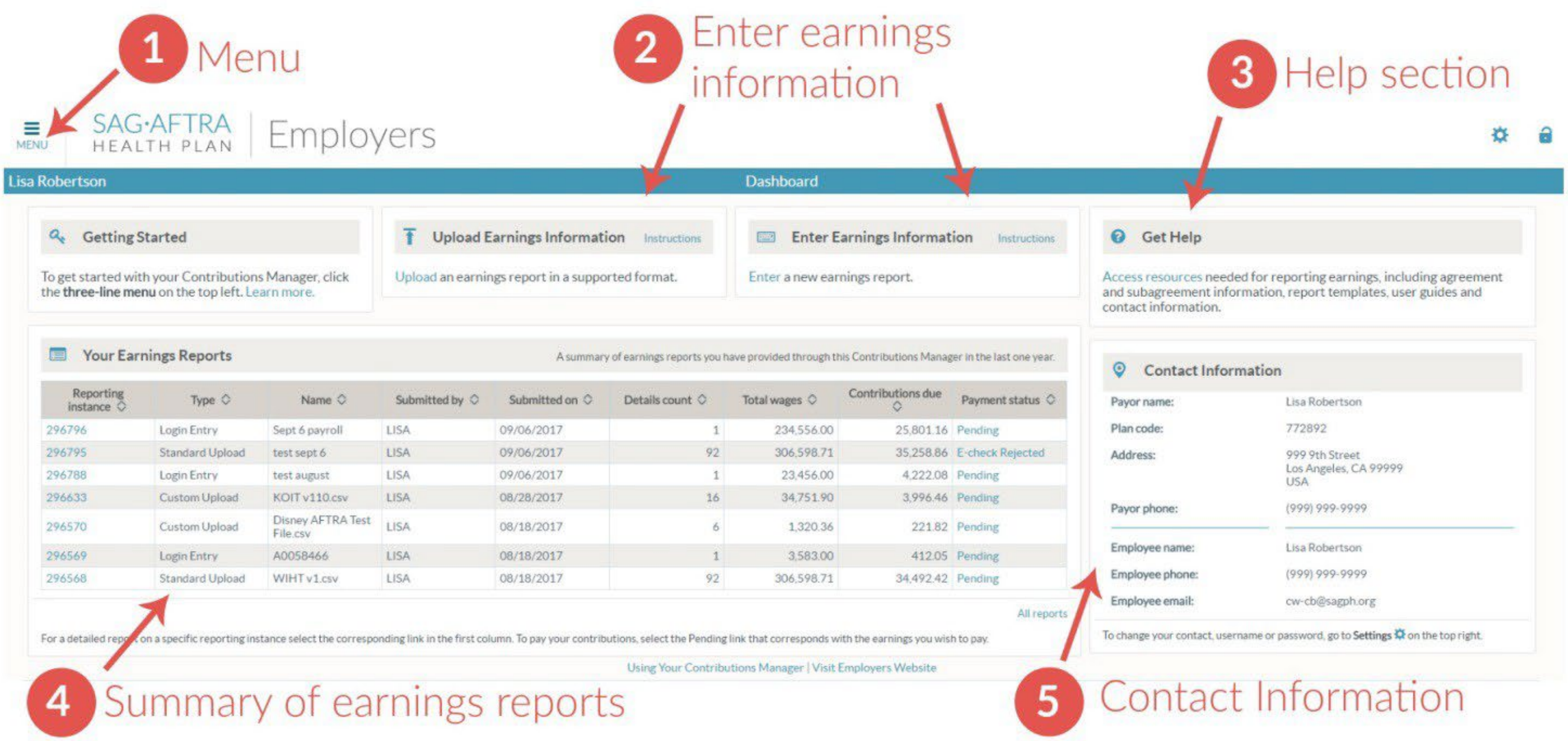
After registration is approved, you will receive a temporary password. The first time you log in, you will use this password and be prompted to update your password. To use the Contributions Manager, you will need to log in using the username and password you created during the registration process. Ifyou did not receive an email from us when you tried to register, please call (818) 973-4472.



Your Dashboard

Once you have logged in, you will be taken to your dashboard. The Dashboard provides all your account information at-a-glance, including:

1. Drop-down menu (available on all pages of the site).
2. Links for uploading and entering earnings.
3. Link to the help section.
4. Summary of your earnings reports.
5. Your current contact information.



The three-line pull-down menu at the top left of the site is available on every page. This menu provides links to:

- **Your Dashboard**
- **Upload Earnings**: Upload earnings reports, which is the optimal way to upload earnings information if you report on a regular basis.
- **Enter Earnings**: Enter earnings reports manually. This option is ideal for infrequent users who report on only a small number of employees or regular reporters who forget to include one or two employees on an upload.
- **Pay Contributions**: Securely pay contributions online.
- **Reports**: View, download and print reports individually or in bulk within a given date rate.

Uploading Earnings Reports

An earnings report is a CSV file containing earnings information for work performed under SAG-AFTRA Collective Bargaining Agreements. If you are an infrequent reporter with a small number of employees, consider entering the information manually in the **Enter Earnings** section.

Before You Begin

There are two types of reports:

1. A **standard report** is an earnings report submitted using our CSV template. Uploading a standard report will expedite the upload process.
2. A **custom report** is an earnings report submitted using your own CSV file. Uploading a custom report will require a little more work, as you will need to map your column names so that they match ours. Even if you upload a custom report, we recommend looking at our templates and familiarizing yourself with the fields to be mapped or renaming your fields to match the labels used in our template.

Note: Broadcast employers who report station staff on a regular basis should use the abbreviated broadcast template. All other reporters should use the standard template. If you are reporting station staff earnings for the first time, please contact to the Plans to confirm your call letter(s) necessary for reporting.

Note: Safari users should select **shift** when downloading the templates.

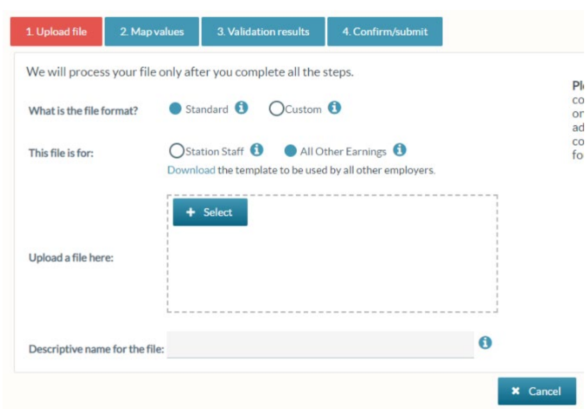
- Download the station staff (broadcast) employers template.
- Download the template for all other employers.
- Download our template tips to learn how all data should be entered into the station staff template.
- Download our template tips to learn how all data should be entered into the non-station staff template.

Uploading a Standard File

A standard earnings report file is generated using one of our standard CSV templates. Using one of our templates will make reporting earnings much easier. Download and fill in the template for station staff (broadcast) employers or all other employers prior to beginning your upload. Please be aware that the columns on the standard template *can* be reordered, however, all columns must be present, and the names cannot be changed for the file to upload successfully. You can review the Contributions Manager Glossary of Terms and the template tips for station or non-station reporting to review what information should go in each column. Some columns require standard terms in order to process. If you do not use our standard terms you will be asked to map your values once your file is uploaded.

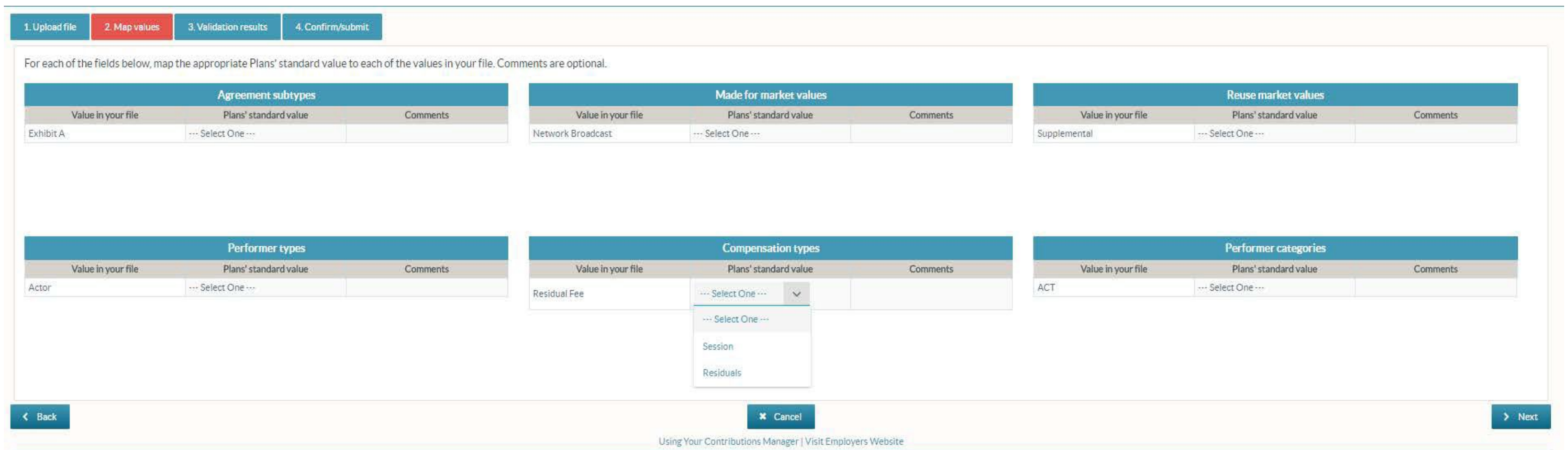
1. Sign in to the Contributions Manager by entering the username and password you created during the registration process.
2. Select **Upload Earnings Information** from your dashboard or the drop-down menu.

3. **What is the file format?** Select **Standard**.
4. **Is this file for station staff?** If you are reporting for station (broadcast) employees using the station staff template, select **Yes**. If you are reporting on any other contract type, select **No**.
5. **Upload a file here**: Click **Select** to upload your earnings report or drag and drop your file into the upload area.
6. **Description name for the file:** Enter a description for your file. Every file is required to have a unique name that will be displayed on your dashboard. We recommend the project title or station and the pay period date.



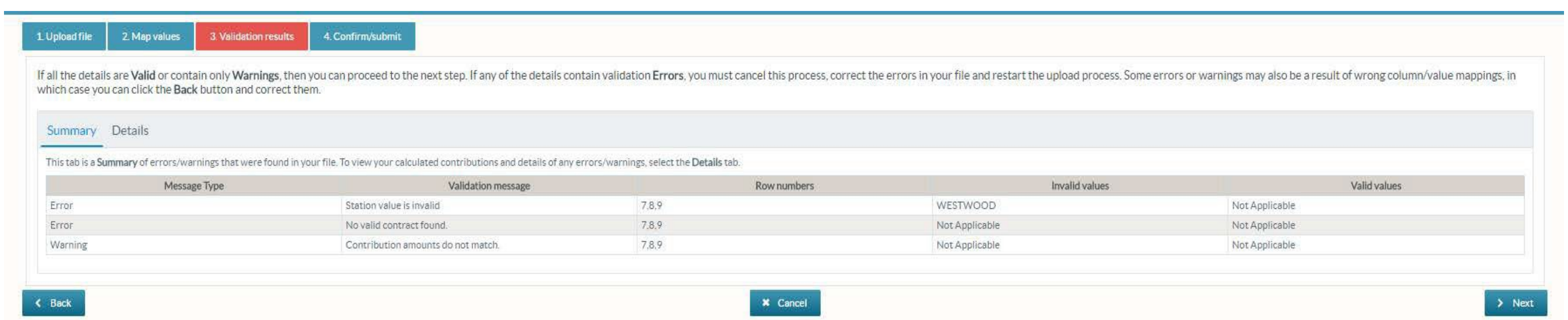
7. Select **Next** in the lower right corner of the screen.

8. If you enter a standard report but the values in your file do not match our standard values, you will be taken to the **Map Values** page (as shown below). Here you will be asked to map the values from your file to one of our standard values for that field before proceeding to the error/warning section of the upload. Download template tips [for station staff reporting]() or [non-station staff reporting](). If your file does not require mapping you will skip this step and this page. If you have mapped fields in the past, you will see this data each time you see the mapping page. Once you map your values you will not need to do so again for future files.



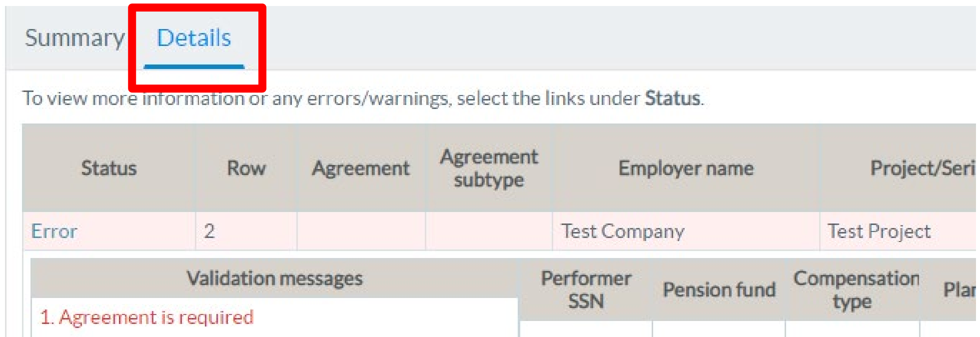
9. Once mapping is completed select the **Next** button at the bottom right of the page.

10. The **Validation** results page will show any errors or warnings within our file that should be reviewed and addressed. The **Summary** section will display a list of errors and warnings associated with your file and the row numbers these errors or warnings apply to. The **Details** tab provides all the details regarding each employee's earnings and shows any errors you may need to fix.



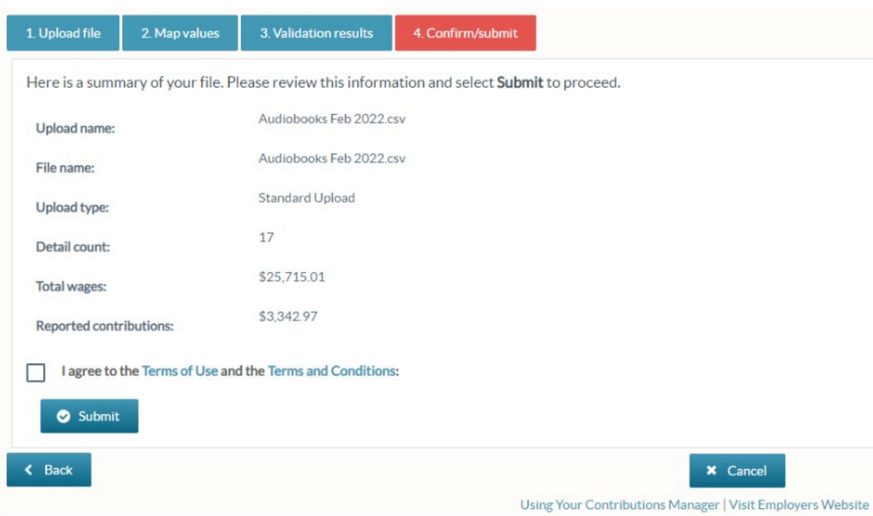
11. If errors or warnings are detected, select the **Details** tab, and the reported earnings with errors or warnings will be noted in the **Status** column. When you select on the **Warning** or **Error**, a validation message will appear to display any issues. Although it is best to address all warnings and errors in your original document and re-upload it, you can proceed without fixing the warnings.

    Note: You will not be able to complete the upload if errors are found; you will need to fix the errors in your original document and re-upload it.

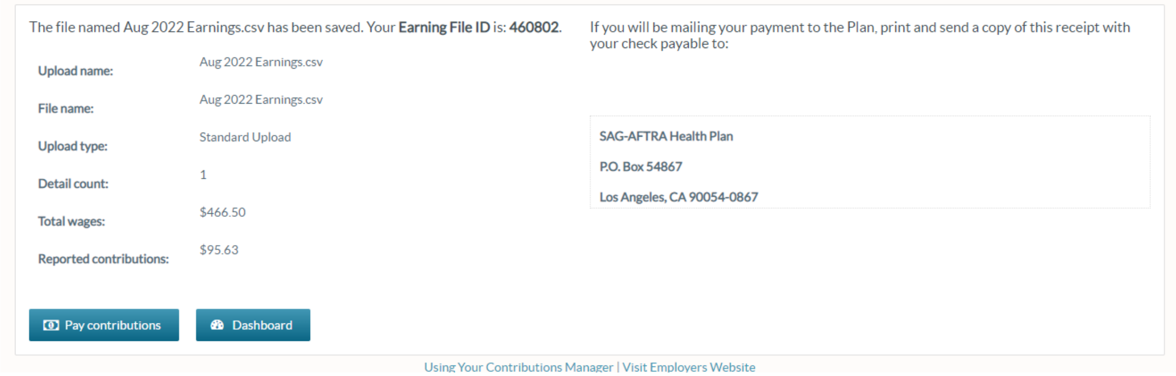


12. Once you are ready to upload your report, select **Next** in the bottom, right corner of the screen.

13. The **Confirm/submit** page shows a summary of the information you've submitted including your upload name, your file name, the upload type, number or details, and total wages and contributions in your file. Review the summary information for accuracy then agree to the Plan's **Terms of Use and Terms** and **Conditions** and select **Submit**.



14. Once you have submitted your file your file receipt will display. This page includes your earning File ID, the summary information for your file and the mailing address of the Plans.
    - If you are mailing your payment, print the receipt page and send a copy with your check to the address shown. Be sure to include the File ID on your check.
    - If you are paying electronically, select the **Pay contributions** button on this page or pay later through your dashboard.

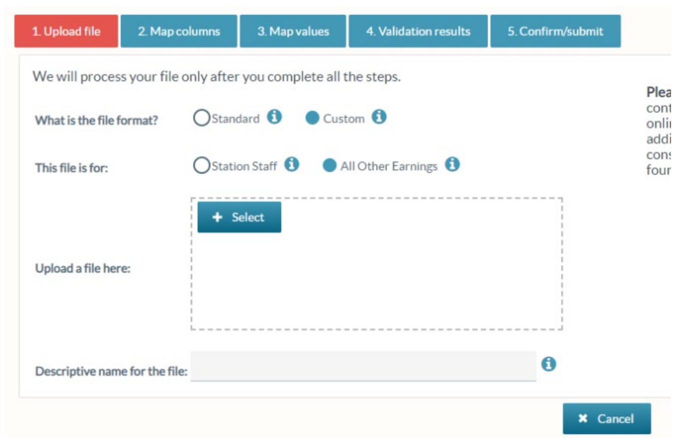


Uploading a Custom File

A custom file is a CSV file using your own formatting. With this function, after you have uploaded the file, you can map your columns to match the standard column names for the Plans. Once saved, the mapped categories will automatically be recognized in future uploads. Even if you are uploading a custom file, we recommend modifying your file with the column names shown in our templates for all other employers prior to beginning your upload. This will make matching the columns easier.

1. Sign in to the Contributions Manager by entering the username and password you created during the registration process.
2. Select the link to upload earnings information on your dashboard or in the menu.

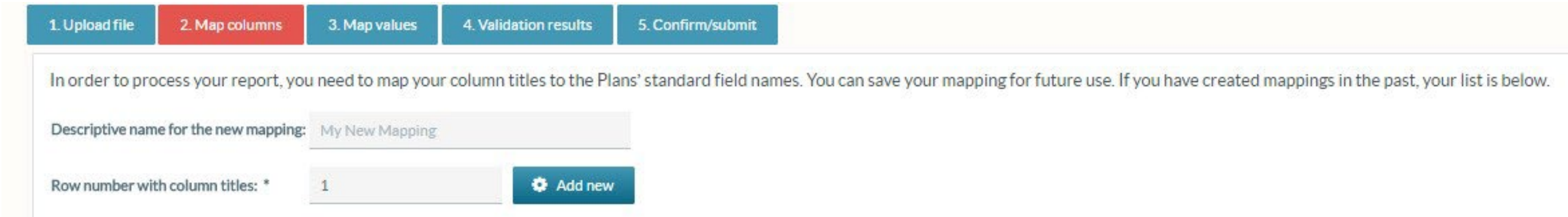
3. **What is the file format?** Select **Custom** from the options.
4. **Is this file for station staff?** If you are reporting for station (broadcast) employees, select **Yes**. If you are reporting for any other contract type, select **No**.
5. **Upload a file here**: Click **Select** to upload your earnings report or drag and drop your file into the upload area.
6. **Description name for the file:** Enter a description for your file. Every file is required to have a unique name that will be displayed on your dashboard. We recommend the project title or station and the pay period date.



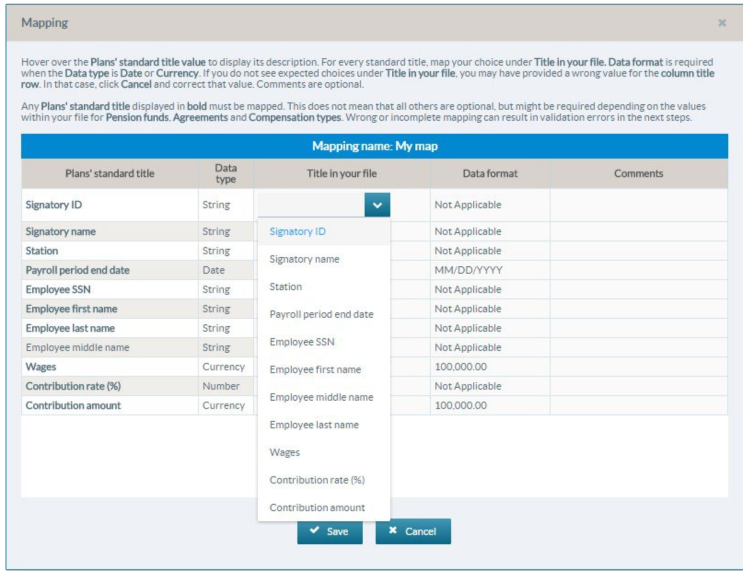
7. Select **Next** in the right, lower corner.

8. Because you have entered a custom report, you will need to map the columns names in your file to our standard column name values on the **Map Columns** page. Once you create the mapping for this report, you will be able to use the saved mapping every time you upload the same custom report.

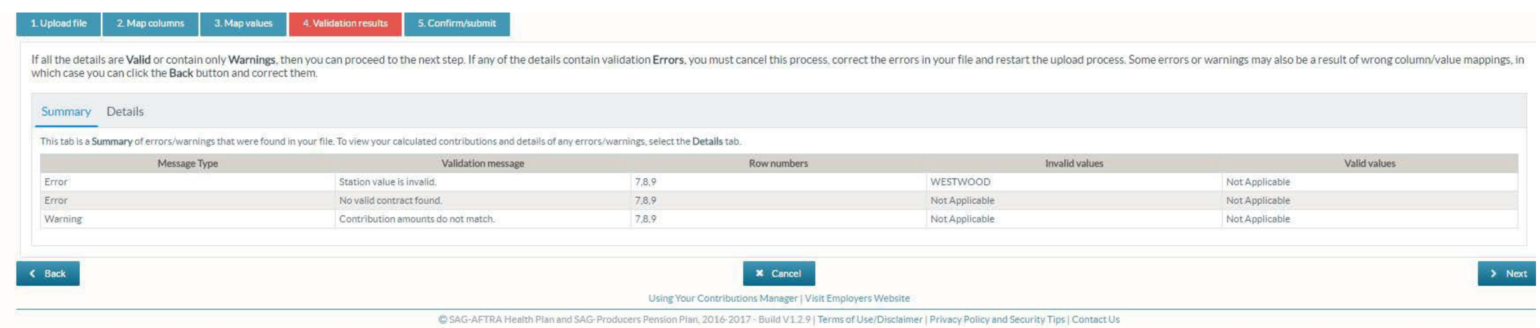
- Enter the **Descriptive name for the new mapping**, which is the name you give the mapping so you can select it again the next time you upload the same type of report.
- Enter the **Row with the column titles**, which is the row on your CSV file where your column titles appear. Typically, this is row 1, but can vary based on the file you're using
- Select **Add new** to create your custom mapping.



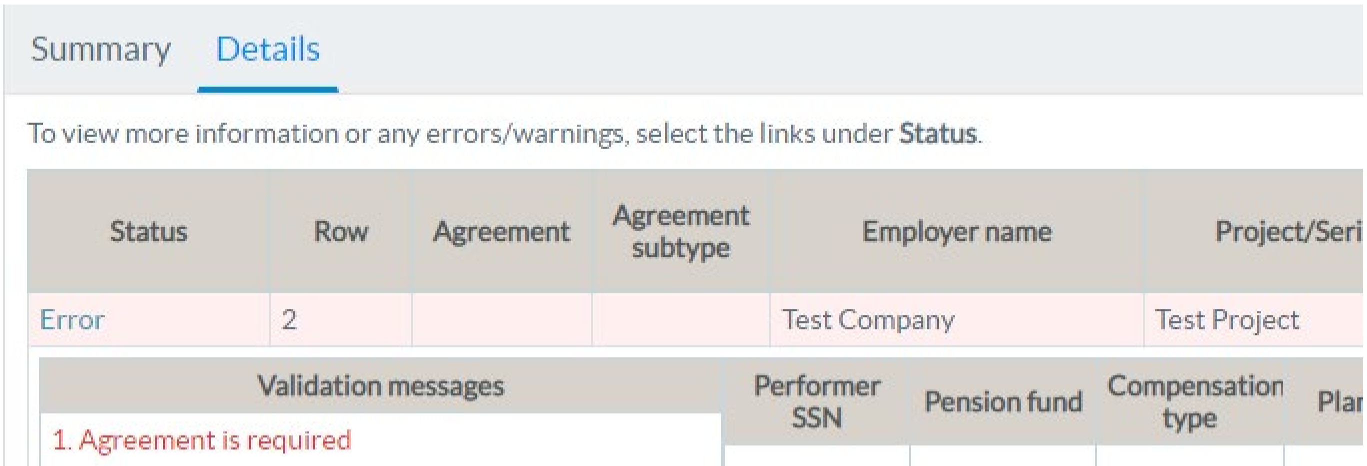
- A Mapping pop-up allows you to assign the Plans' standard column value to the column values in your file. For currency and date fields, you will need to map the data format accordingly. You can reference the Contributions Manager Glossary of Terms and the tips for either station staff or non-station for assistance with the column value definitions.
- Select **Save** and once the popup window closes, select **Next**.



9. The **Validation** results page will show any errors or warnings within our file that should be reviewed and addressed. The **Summary** section will display a list of errors and warnings associated with your file and the row numbers these errors or warnings apply to. The **Details** tab provides all the details regarding each employee's earnings and shows any errors you may need to fix.

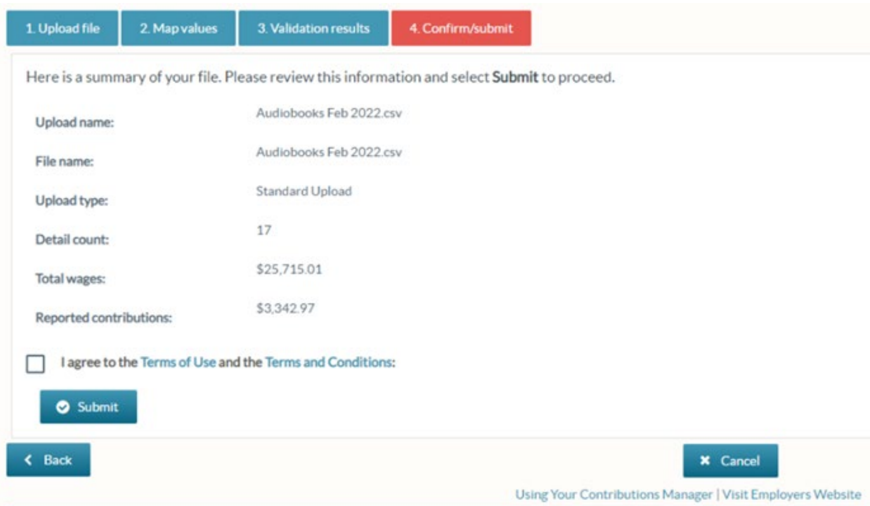


10. If errors or warnings are detected, select the **Details** tab, and the reported earnings with errors or warnings will be noted in the **Status** column. When you select on the **Warning** or **Error**, a validation message will appear to display any issues. Although it is best to address all warnings and errors in your original document and re-upload it, you can proceed without fixing the warnings. **Note:** You will not be able to complete the upload if errors are found; you will need to fix the errors in your original document and re-upload it.

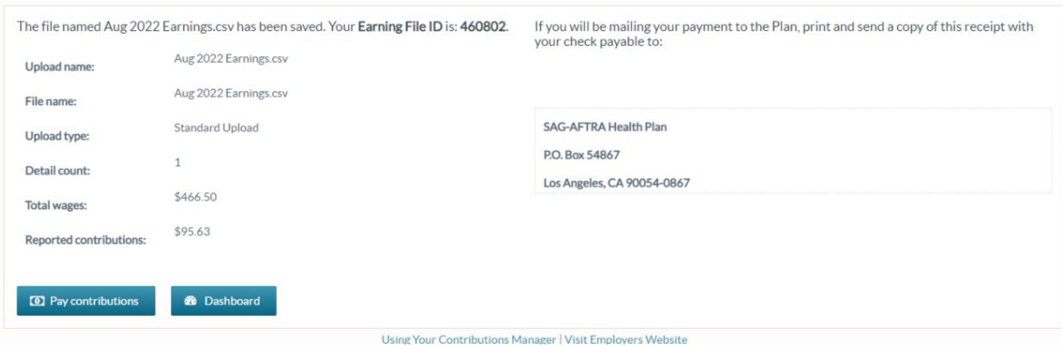


11. Once you are ready to submit your report, select **Next** in the bottom right corner.

12. The **Confirm/submit** page shows a summary of the information you've submitted including your upload name, your file name, the upload type, number or details, and total wages and contributions in your file. Review the summary information for accuracy then agree to the Plan's **Terms of Use** and **Terms and Conditions** and select **Submit**.



13. Once you have submitted your file your file receipt will display. This page includes your earning File ID, the summary information for your file and the mailing address of the Plans.
    - If you are mailing your payment, print the receipt page and send a copy with your check to the address shown. Be sure to include the File ID on your check.
    - If you are paying electronically, select the **Pay contributions** button on this page or pay later through your dashboard.

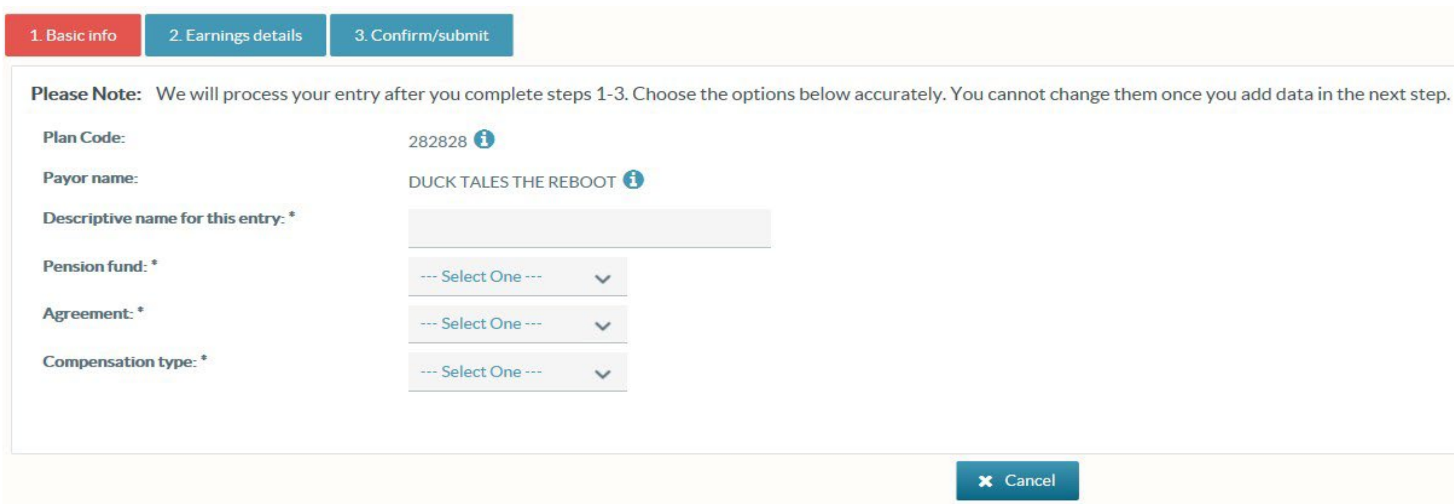


Entering Earnings Information

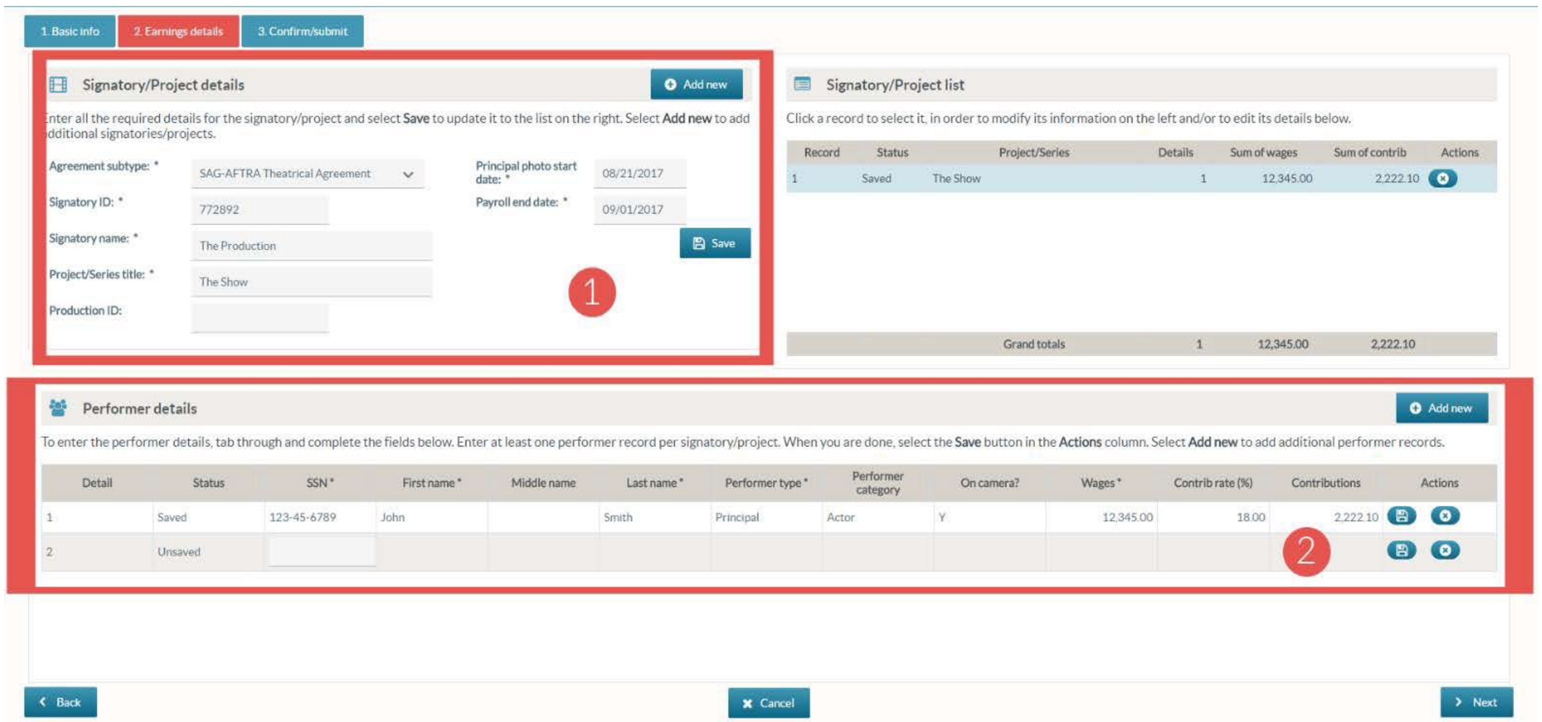
If you do not have an earnings report CSV file and/or only need to provide the earnings of a small number of employees, you may wish to manually enter the information into our system.

1. Sign in to the Contributions Manager by entering your username and password.
2. Select on the link to upload earnings information from your dashboard or the drop-down menu.

3. Your **Plan code** and **Payor name** will already be populated on the page.
4. Enter a descriptive name for this entry (report). Every file is required to have a unique name that will be displayed on your dashboard. We recommend the project title or station and the pay period date.
5. Select the appropriate pension fund, agreement, and compensation type for your employees. A list of values for these fields can be found on our Template tips or on the Glossary. Once all fields are complete select **Next**.

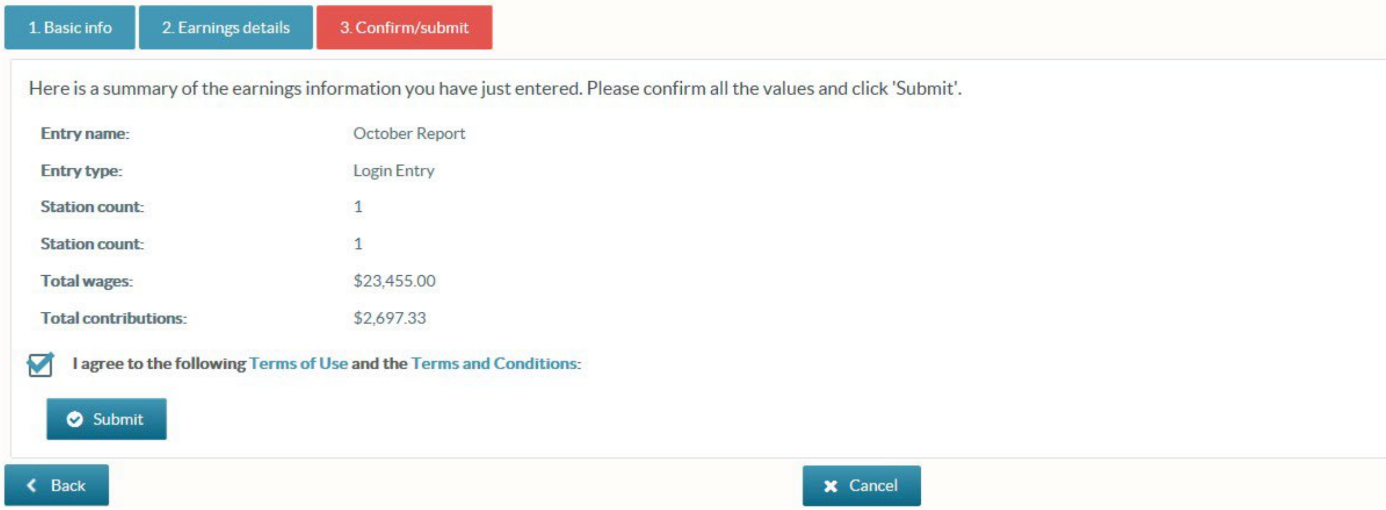


6. On the **Earnings details** page, complete Box 1 for the **Signatory/Project information**. The **Signatory ID** is the Plan code or SAG-AFTRA ID for the Signatory responsible for paying the contributions. Required fields are marked with a * and must be entered prior to saving. Once this box is complete, select **Save**.
7. Box 2 contains fields for **Performer details**. Enter the information for each employee/performer and select the **Save** icon at the end of each line. A new blank line will appearafter each saved entry. Once you have finished all of entries you will need to delete the final blank line before entering a new project or submitting.
8. If you would like to submit more than one project for the same type of agreement select the **Add new** button in Box 1 and enter the information for any additional projects. The **Signatory/Project list** will show a summary of information entered for each project. Earnings for any other agreements will need to be submitted as a separate file.
9. Once you have completed entering your earnings information select **Next**.

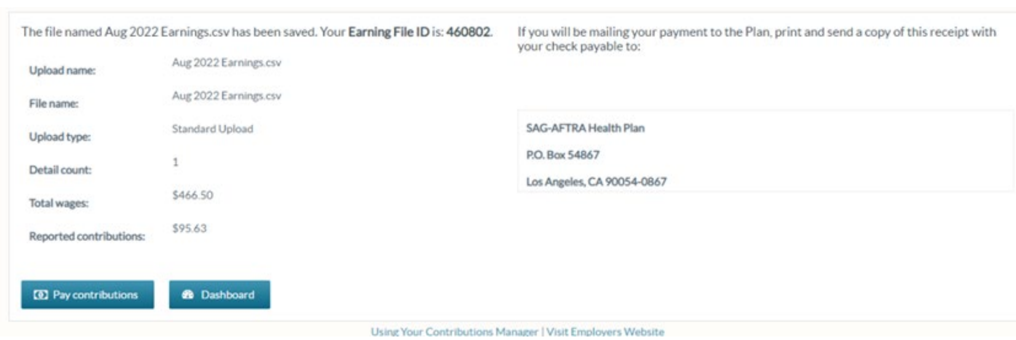


Note: Your **Earnings details** page may have slightly different fields based on the agreement you selected on the previous page. For definitions of any of the fields please reference the Glossary.

10. The **Confirm/submit** page shows a summary of the information you've submitted including your upload name, your file name, the upload type, number or details, and total wages and contributions in your file. Review the summary information for accuracy then agree to the Plan's **Terms of Use** and **Terms and Conditions** and select **Submit**.



11. Once you have submitted your file your file receipt will display. This page includes your earning File ID, the summary information for your file and the mailing address of the Plans.
    - If you are mailing your payment, print the receipt page and send a copy with your check to the address shown. Be sure to include the File ID on your check.
    - If you are paying electronically, select the **Pay contributions** button or pay later through your dashboard.



Paying Contributions

Contributions can be paid electronically or by mail.

By mail

Send a check and copy of your report receipt to the Plans at

SAG-AFTRA Health Plan
P.O. Box 54867
Los Angeles, CA 90054-0867

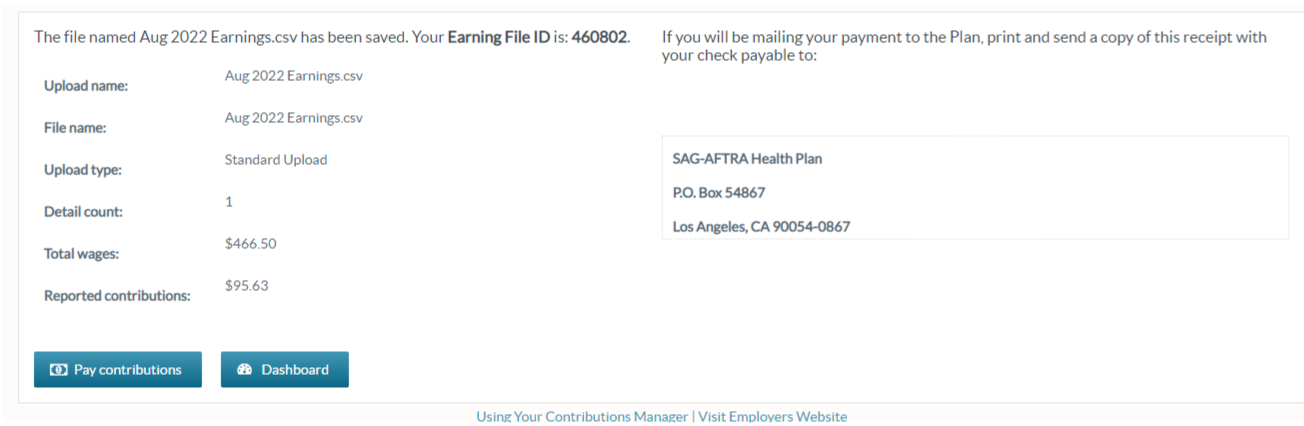
Please include your File ID on your check.

Electronically

You can begin the process to pay electronically from your confirmation screen immediately after submitting an earnings file or from the Earnings Report list on your dashboard.

From the confirmation screen:

Select the **Pay contributions** button on the receipt page immediately after entering earnings



From your dashboard:

Under **Payment Status**, select the **Pending** link in the row corresponding with the earnings File ID you would like to pay.

Your Earnings Reports

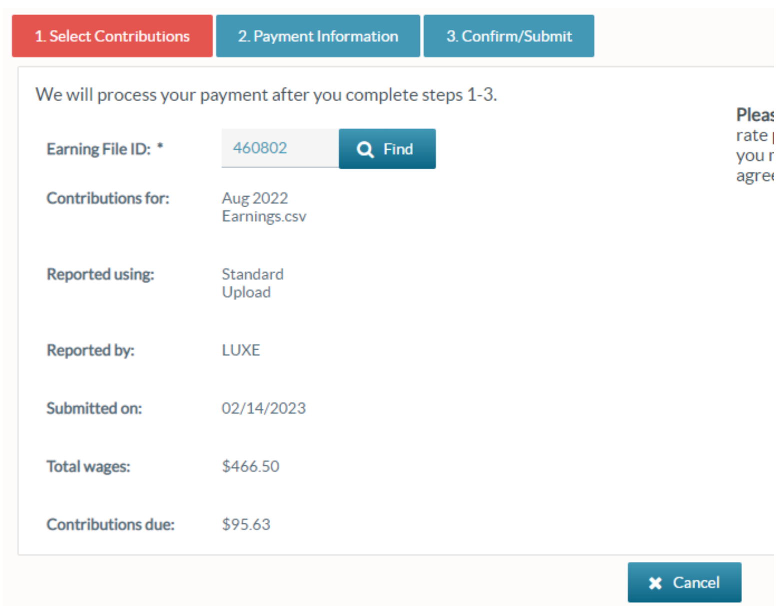
A summary of earnings reports you have provided through this Contributions Manager in the last one year.

Reporting instance	Type	Name	Submitted by	Submitted on	Details count	Total wages	Contributions due	Payment status
296795	Standard Upload	test sept 6	LISA	09/06/2017	92	306,598.71	35,258.86	E-check Received
296788	Login Entry	test august	LISA	09/06/2017	1	23,456.00	4,222.08	Pending
296633	Custom Upload	KOIT v110.csv	LISA	08/28/2017	16	34,751.90	3,996.46	Pending
296570	Custom Upload	Disney AFTRA Test File.csv	LISA	08/18/2017	6	1,320.36	221.82	Pending
296569	Login Entry	A0058466	LISA	08/18/2017	1	3,583.00	412.05	Pending
296568	Standard Upload	WIHT v1.csv	LISA	08/18/2017	92	306,598.71	34,492.42	Pending

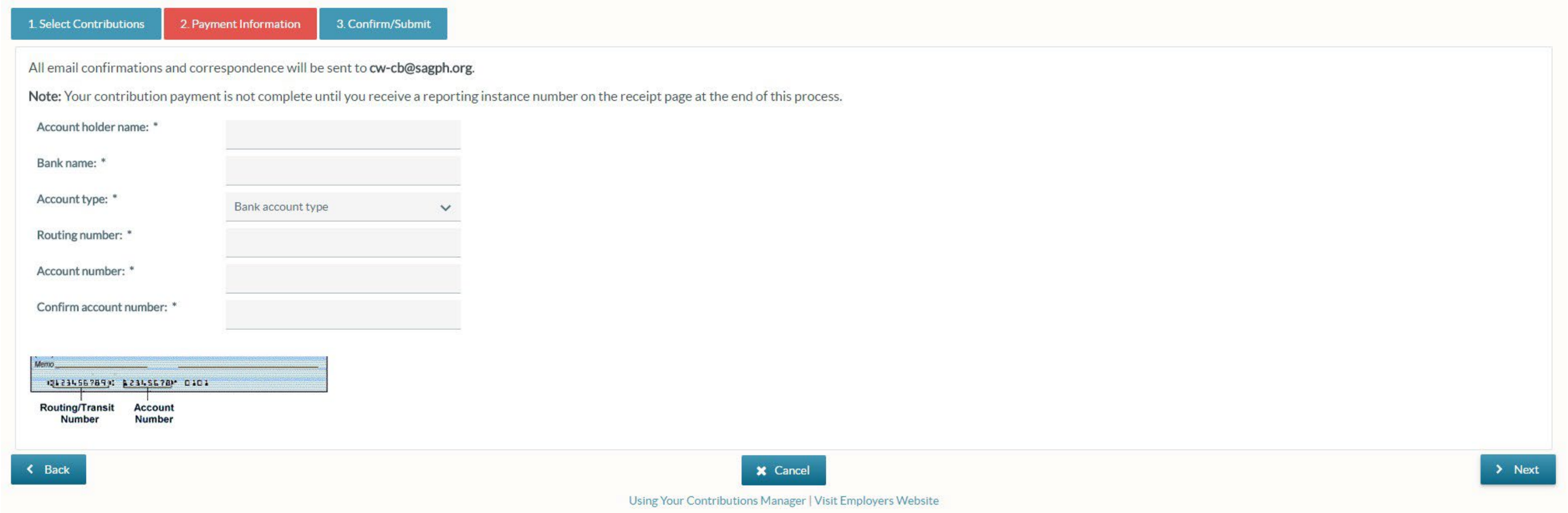
Click the link in the first column for the detailed report. When active, click the link in the last column to pay contributions.

All reports

1. Either option will launch the **Select Contributions** page. Review all the contribution information on the **Select Contributions** page to ensure you have opted to pay the contributions for the correct earnings file and select **Next**.



2. Use the **Payment Information** page to enter your electronic payment information. See [Glossary](#) for clarification on any required field definitions. Once complete select **Next**.



3. This will launch the **Confirm/Submit** tab.
4. Confirm the information you entered is correct and select **Submit**.
5. A receipt will display confirming payment. For security reasons, we do not save payment information and you will need to re-enter your payment information each time you make an online payment.

Generating Reports

The Contributions Manager allows users to view, download and print reports individually or in bulk for a given date range. In order to generate reports, you will need to turn off pop-up blockers.

File ID-specific Reports

This report allows you to create a report for a specific file.

1. On your Dashboard, go to the **Your Earnings Report** section and find the report for which you would like to download information.
2. Select the reporting instance number.

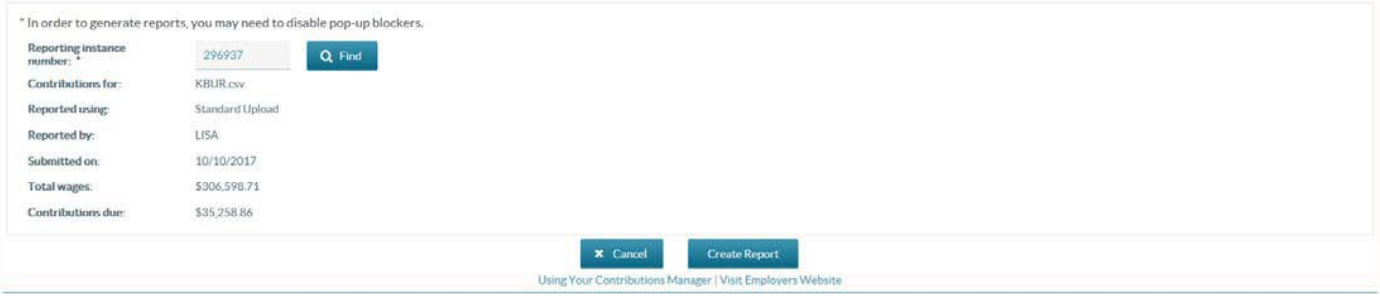
Your Earnings Reports

A summary of earnings reports you have provided through this Contributions Manager in the last one year.

Reporting instance	Type	Name	Submitted by	Submitted on	Details count	Total wages	Contributions due	Payment status
296795	Standard Upload	test sept 6	LISA	09/06/2017	92	306,598.71	35,258.86	E-check Received
296788	Login Entry	test august	LISA	09/06/2017	1	23,456.00	4,222.08	Pending
296633	Custom Upload	KOIT v110.csv	LISA	08/28/2017	16	34,751.90	3,996.46	Pending
296570	Custom Upload	Disney AFTRA Test File.csv	LISA	08/18/2017	6	1,320.36	221.82	Pending
296569	Login Entry	A0058466	LISA	08/18/2017	1	3,583.00	412.05	Pending
296568	Standard Upload	WIHT v1.csv	LISA	08/18/2017	92	306,598.71	34,492.42	Pending

Click the link in the first column for the detailed report. When active, click the link in the last column to pay contributions. All reports

3. On the next screen verify that the report you've selected is correct and select the **Create Report** button.

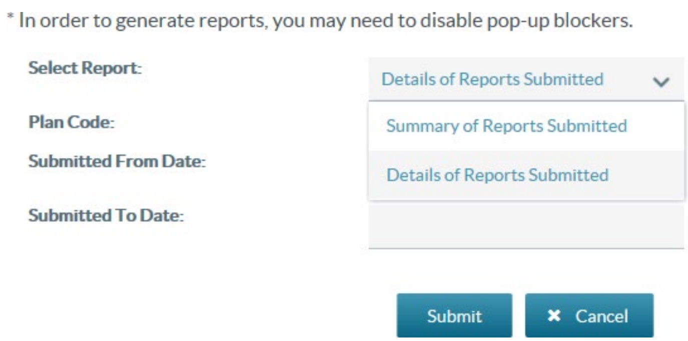


4. The report will launch a new tab in your browser. On the top left, you can save or print your report, scroll through or jump to different pages, adjust the view or search for specific names or data.

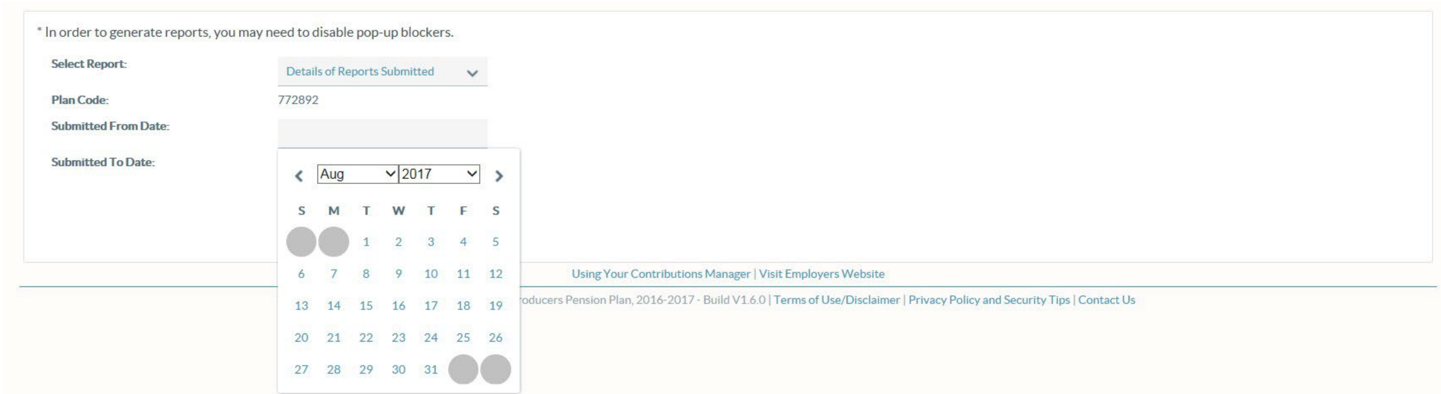
Viewing Details of Submitted Reports
You can view submitted reports for a specific date range. To generate this type of report:

1. Select the **menu** dropdown.
2. Select **Reports**.

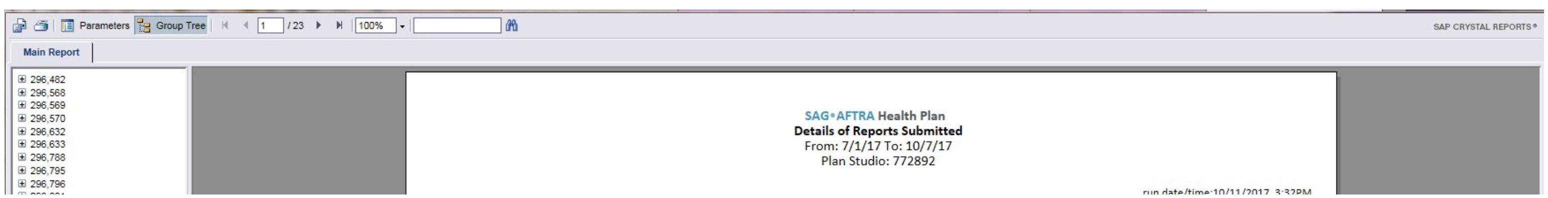
3. On the next page, select **Details of Reports Submitted** from the drop-down.



4. Select the date from which you would like your report to begin by clicking inside the field next to **Submitted From Date** and choosing from the calendar.



5. Select the end date by clicking inside the field next to **Submitted To Date** and choosing from the calendar.
6. Select **Submit**.
7. The report will launch in a new tab in your browser. Each page of the report provides details of a specific reporting instance. At the top left corner, you can save or print your report, scroll through or jump to different pages/reporting instances, adjust the view or search for specific names or data.

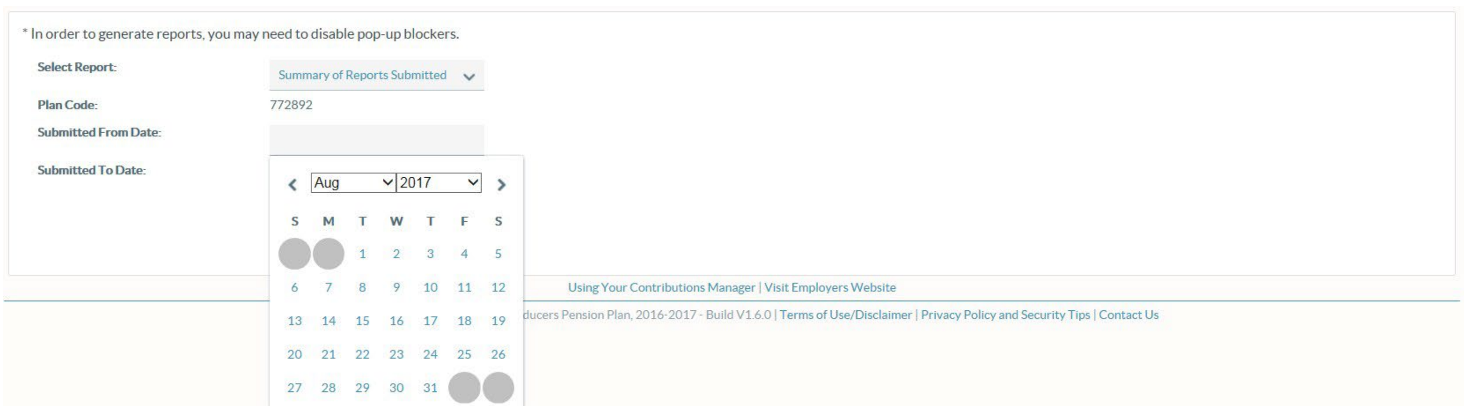


Viewing Summaries of Submitted Reports

This report displays a summary of wages contributions and payment status for a specific date range. To generate this type of report:

1. Select the **menu** dropdown.
2. Select **Reports**.
3. On the next page, select **Summary of Reports Submitted** from the drop-down.

4. Select the date from which you would like your report to begin, by clicking inside the field next to **Submitted From Date** and choosing from the calendar.



5. Select the end date, by clicking inside the field next to **Submitted To Date** and choosing from the calendar.
6. Select **Submit**.

7. The report will launch in a new tab in your browser. At the top left, you can save or print your report, scroll through, or jump to different pages/reporting instances, adjust the view or search for specific names or data.