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

ⓘ *Additional information available in this document*

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”.

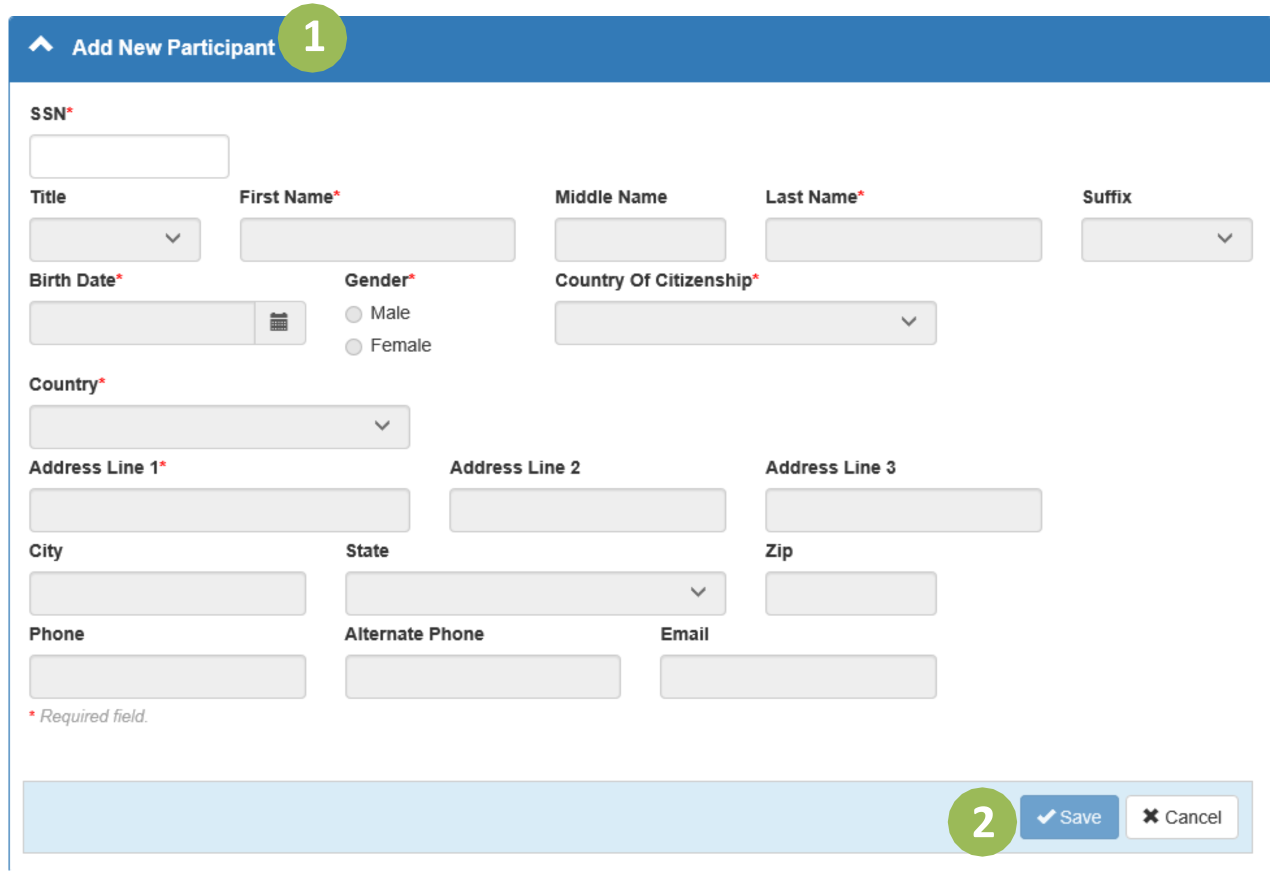
To Add New Participant:

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.



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.

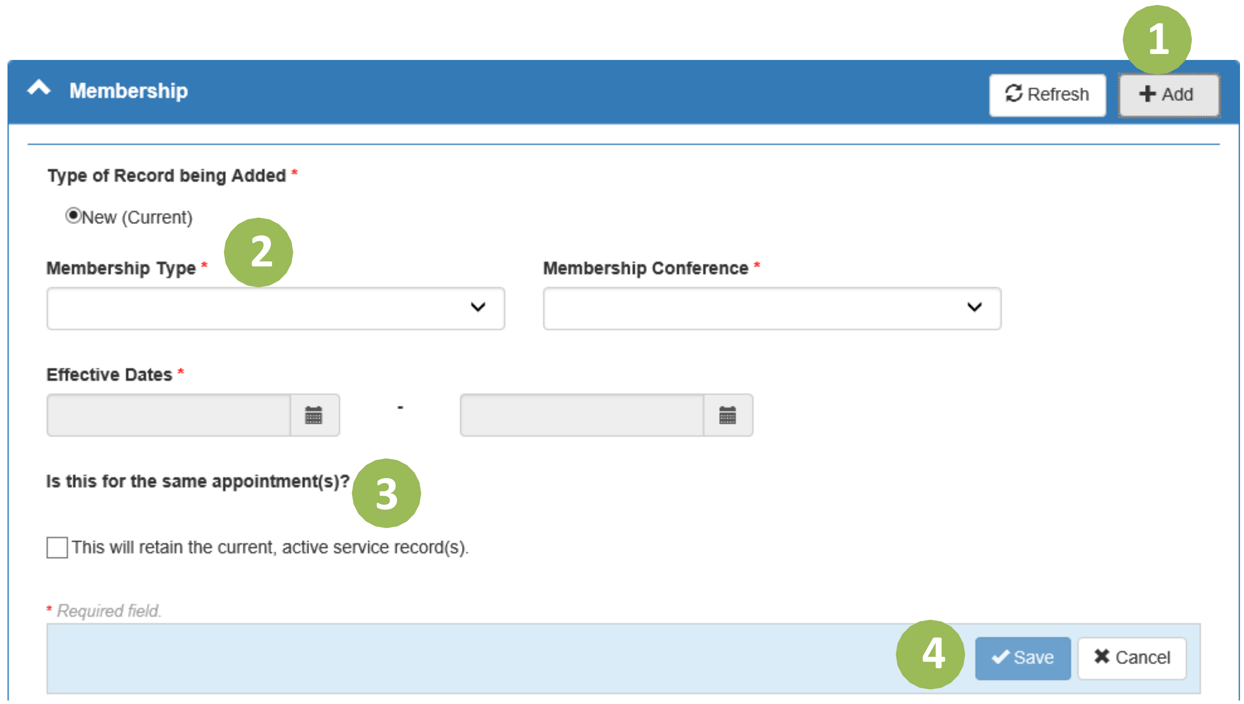
To Add Membership:

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**

Service and Compensation: Add Compensation

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

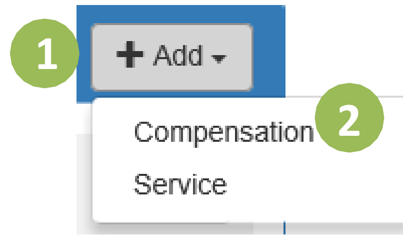
To Add Compensation For Current Services:

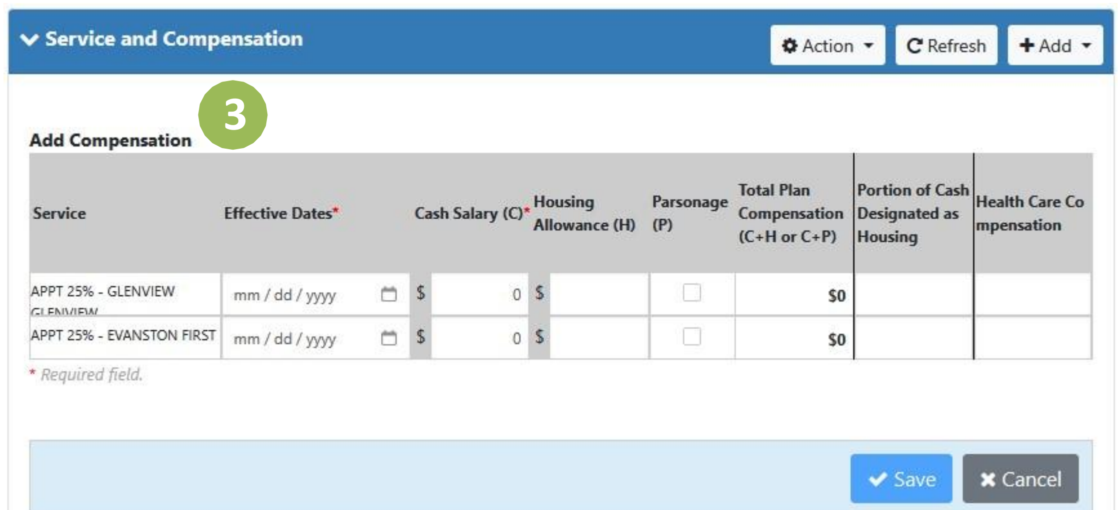
1. On the participant page under **Service and Compensation**, click **Add**

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: Add Service and Compensation

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

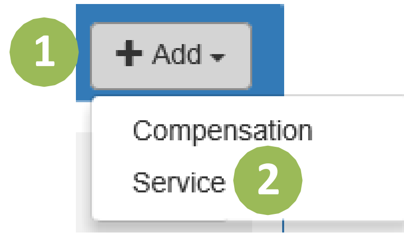
To Add New Service and Compensation:

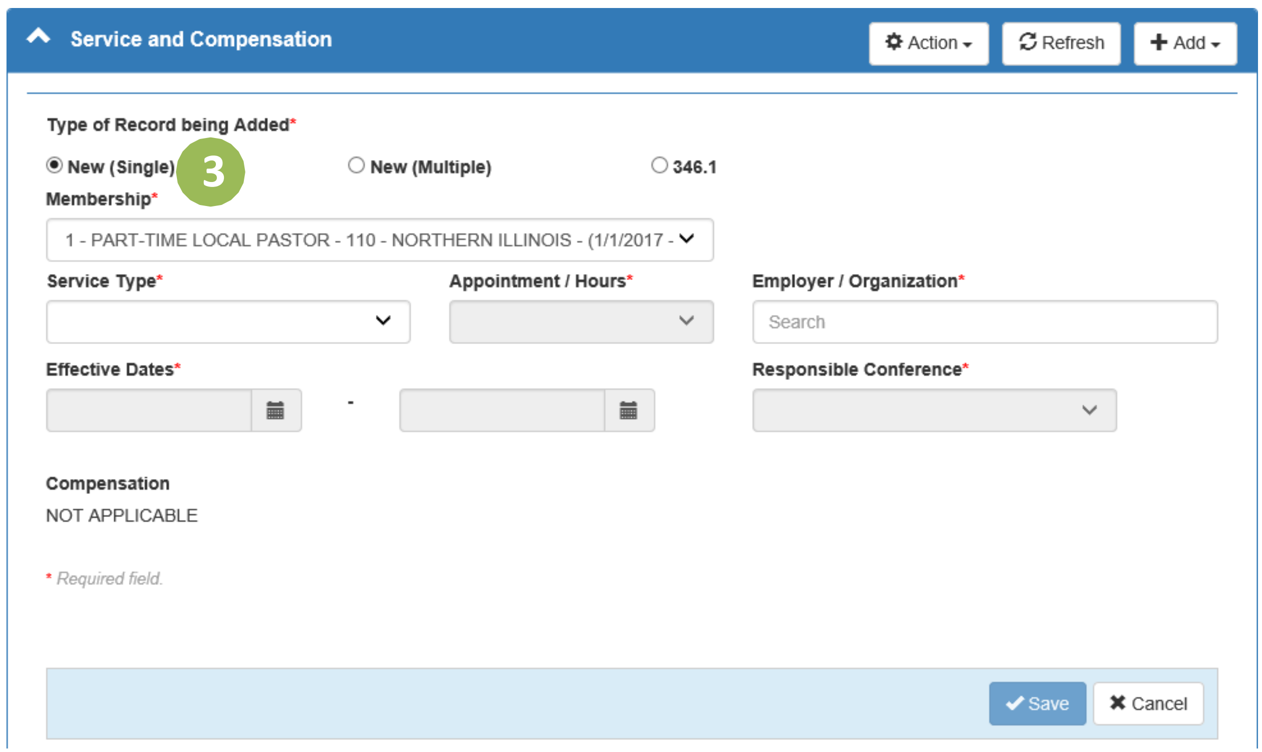
1. On the participant page under **Service and Compensation**, click **Add**

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: Add Multiple Appointments

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Use the Service and Compensation module to add multiple appointments.

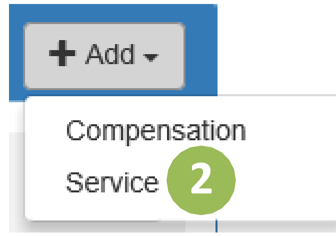
To Add Multiple Appointments:

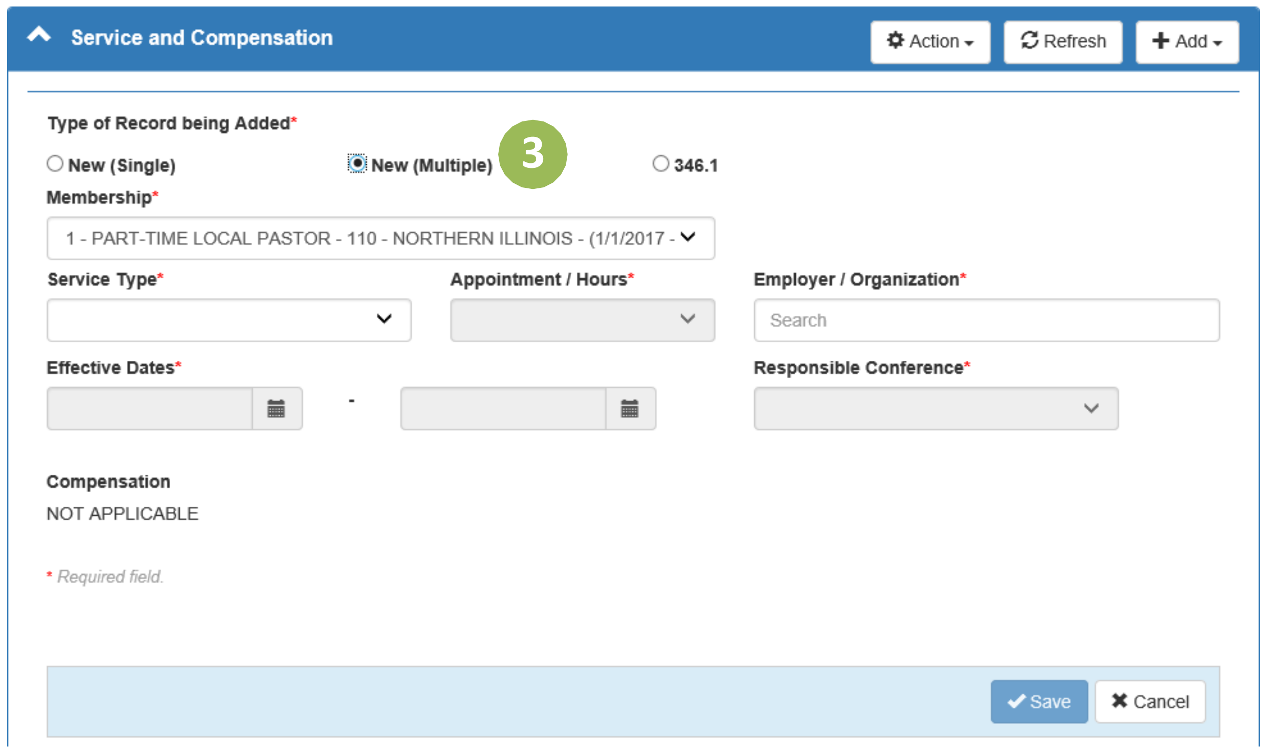
1. For the first appointment, follow the steps to Add New Service and Compensation

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: Edit Service or Compensation

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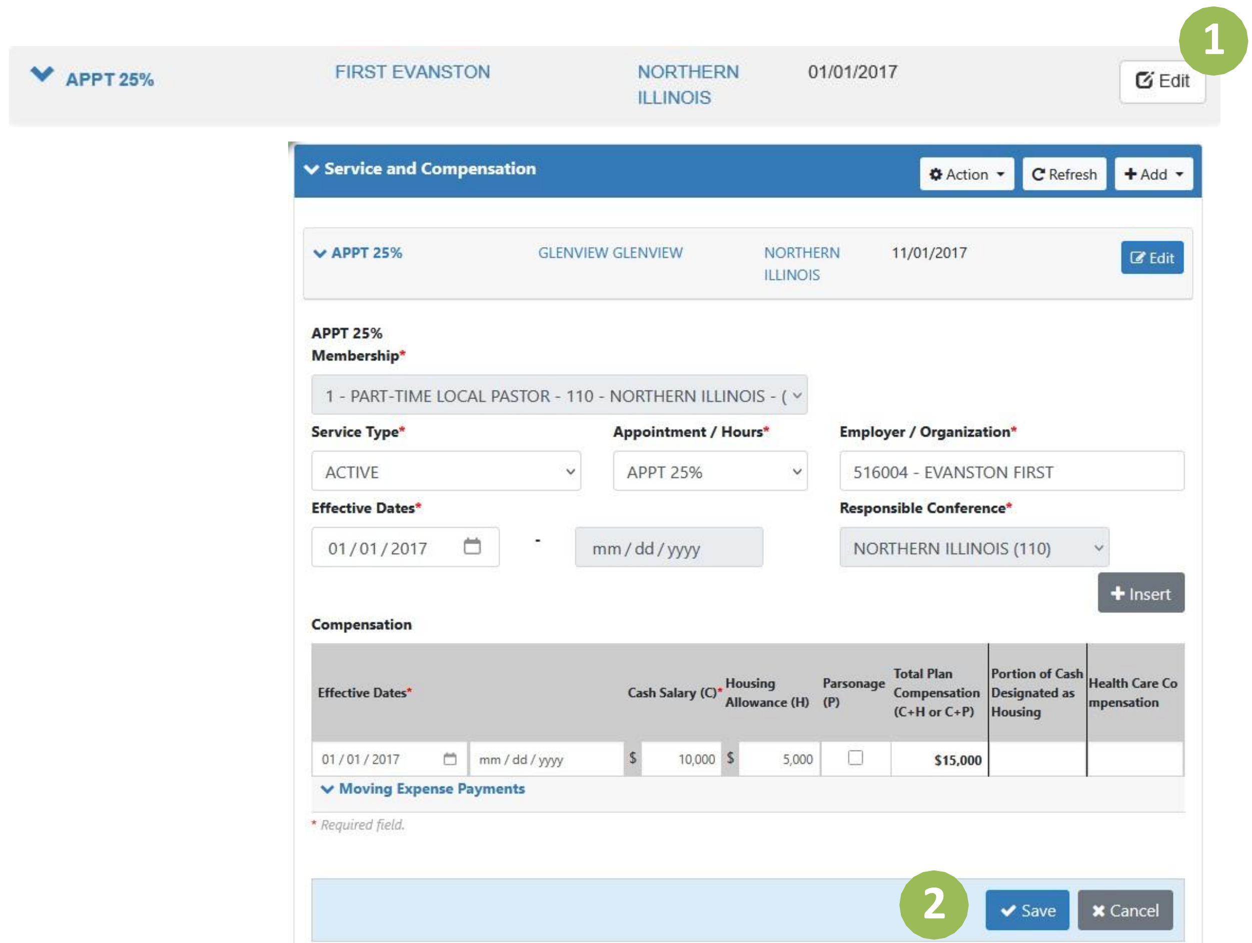
Use the Service and Compensation module to edit inaccurate service or compensation information.

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.*



To Do: Appointments under *Discipline* ¶346.1

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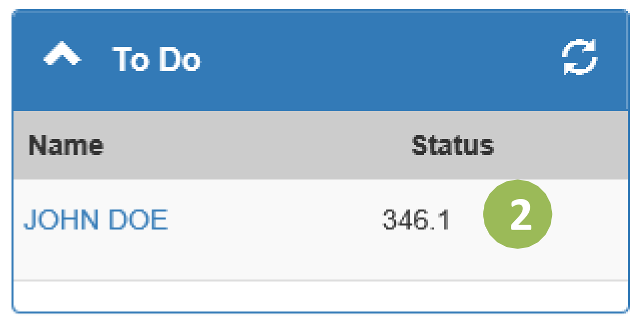
Use the Service and Compensation and To Do modules to manage clergy appointed under *Discipline* ¶346.1.

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



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:

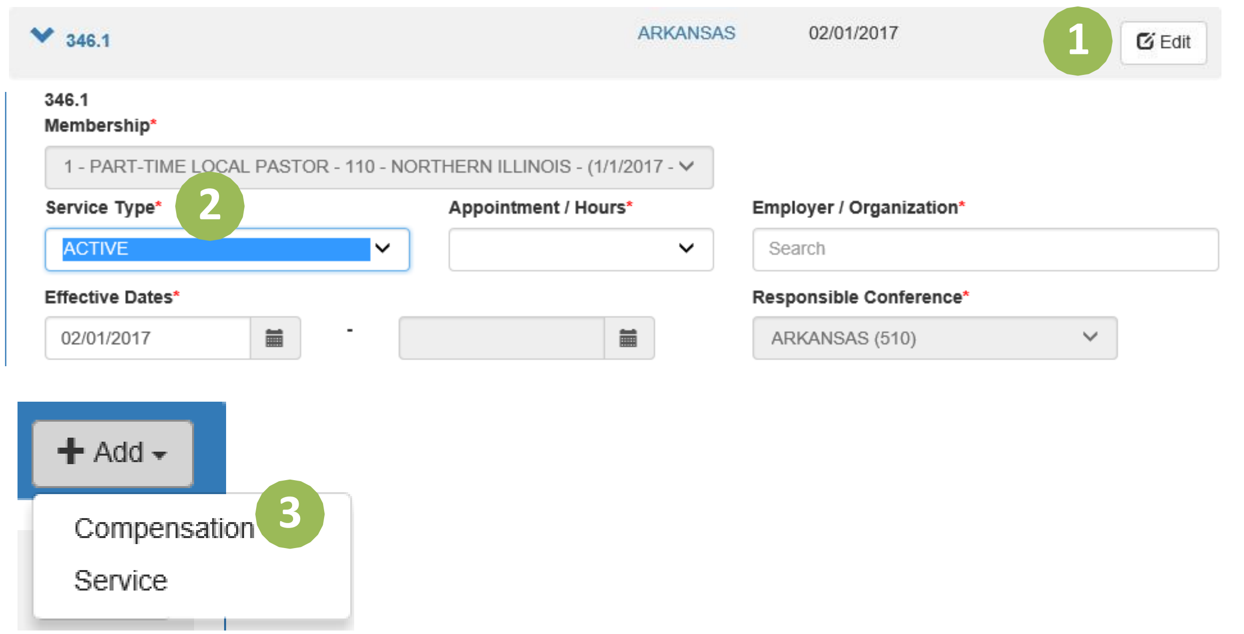
***A.** If the effective date is in the **past**,*
1. Click **Edit** next to the 346.1 record.
2. Change the **Service Type** to **Active.** Enter the applicable information and click **Save.**
3. Click **Add** and select **Compensation** to enter the compensation information and click **Save.**

The 346.1 record will be replaced with the applicable Discipline ¶346.1 appointment information.

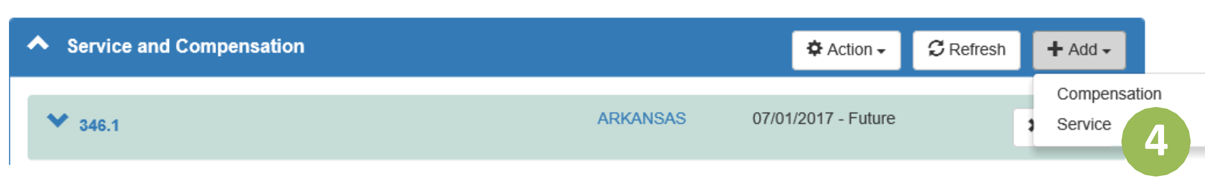
***B.** If the effective date is in the **future**,*
4. Click **Add** and select **Service** to enter the applicable service and compensation information and click **Save**

*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***



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



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**

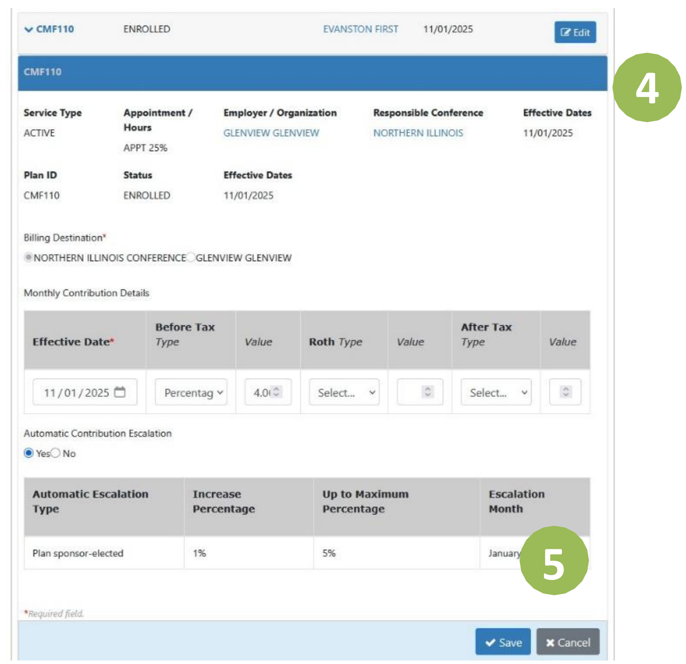
2. Click **Edit** next to the applicable plan name

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**



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.