Participant Benefit Lookup Portal

User's Guide

https://l831portal.pswadmin.com/

If you require assistance with accessing the portal, email: qpwebmaster@pswadmin.com

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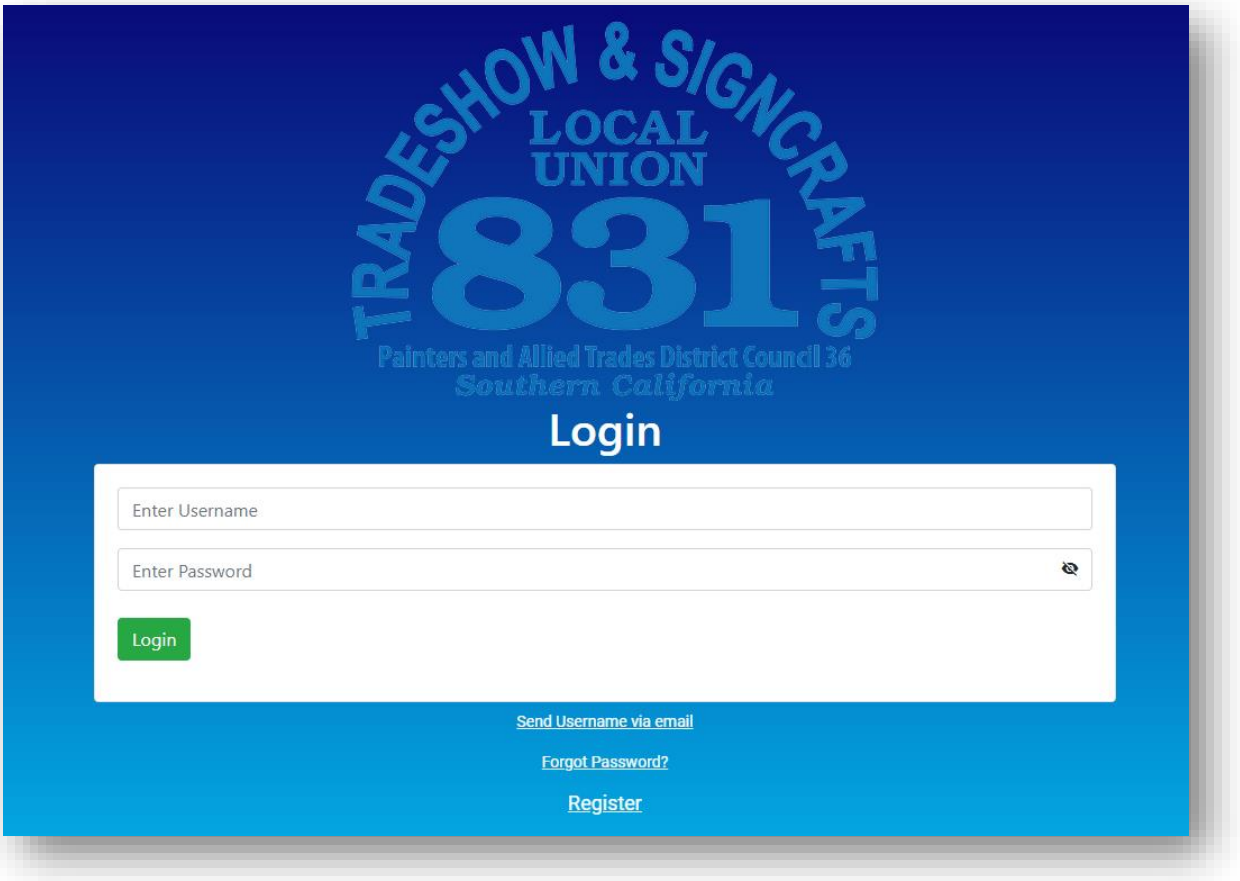
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The Participant Benefit Lookup Portal

The Participant Benefit Lookup Portal (the "Portal") is a self-service portal that enables you, the participant, to view your information in a few key areas. The specifics of what information you can view varies slightly depending on your status, but generally includes contact information, work history, the status of benefits such as health coverage and pension credit accumulation, and, if you are a Retiree, your pension payment history.

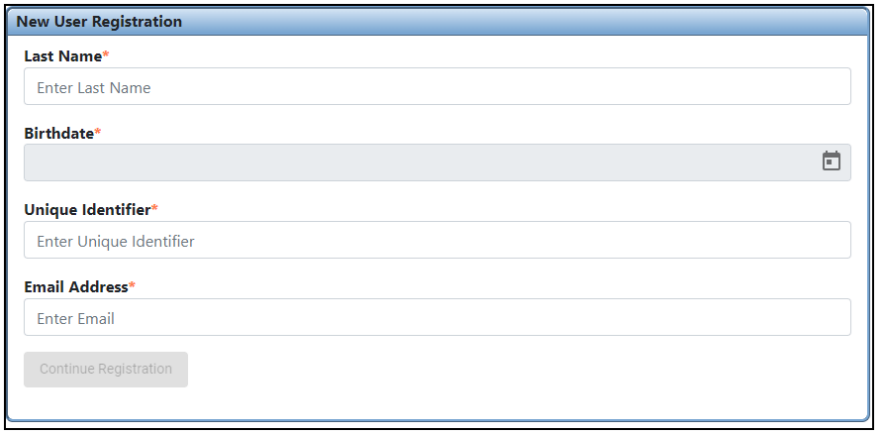
The Login Page

Upon navigating to the Portal, you will be directed to the Login Page. The Login Page allows existing users to log in and new users to register for the Portal and provides methods for you to access your account in the event you forget your username or password:



Registering for the Portal (New User)

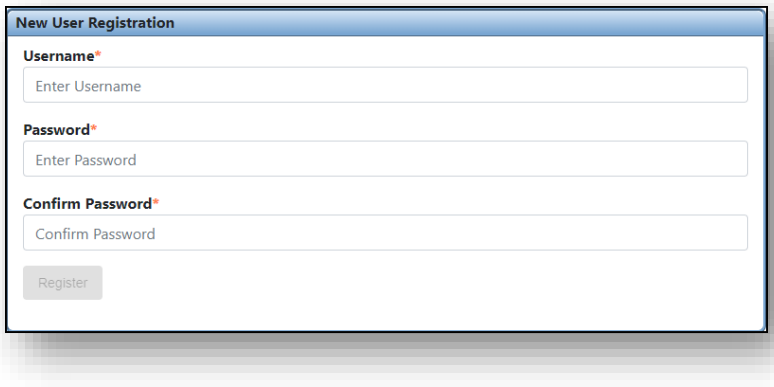
If you are new to the Portal, you must register before you can access your account. This is done by clicking "Register" on the Login Page. This brings up the following page, where the following fields will need to be completed:



Field Name	Field Description	Required
Last Name	The participant's last name must match the data on file with the Trust Fund Office or the participant will be unable to register.	Yes
Birthdate	The participant's date of birth must match the data on file with the Trust Fund Office or the participant will not be unable to register.	Yes
Unique Identifier*	The participant's 9-digit Unique Identifier (assigned by the Trust Fund Office). Must match the data on file with the Trust Fund Office or the participant will be unable to register.	Yes
Email Address	The participant's email address. This email will be used to verify/activate your account and provide a method of retrieving a forgotten username and resetting a forgotten password.	

* If you do not know your Unique ID, please contact the Trust Fund Office.

Upon completion of the above fields, click "Continue Registration" to proceed with the registration process. If the values in one or more of the above fields do not match the data on file with the Trust Fund Office, an error message will be displayed, and the fields indicated in red will need to be corrected. Once all fields are correctly filled out, clicking "Continue Registration" will direct you to the following page where the following fields will need to be completed:

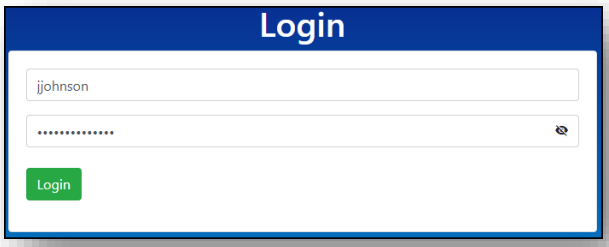


Field Name	Field Description	Required
Username	Choose a username. Usernames must be at least six characters long and cannot contain a space. Special characters allowed. Maximum 30 characters.	Yes
Password	Choose a password. Passwords must be 8- 30 characters long and contain at least one of each of the following: uppercase letter, lowercase letter, number, and special character (~`! @#$%^&* ()_-+= {|:;"'<,>.?/)	Yes
Confirm Password	Re-enter the password typed in the previous field. The Register button will not be enabled until these two fields match in value.	Yes

Once these fields have been filled out, click "Register". This will send a verification email to the email address given on the first registration page. From here, the participant should open the verification email and click the link contained within. They are then redirected to a confirmation page, after which registration is officially complete and the participant can log in to the Portal from the Login page.

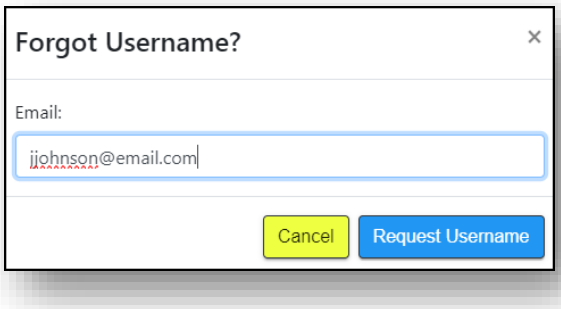
Logging in to the Portal (Existing User)

If you have already registered for the Portal, you can access the portal by logging in. They can do so by simply entering their Username and Password that they created during the registration process in the appropriate fields and clicking the "Login" button.



Accessing the Portal with a Forgotten Username (Existing User)

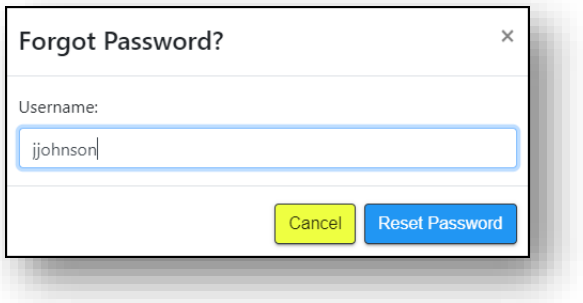
If you forget your Username for the Portal, you can retrieve it by clicking "Send Username via email". This will bring up the following pop-up window where you can enter the email address you used to register for the portal:



Once you've entered the correct email address, you can click "Request Username". This will send an email containing your portal Username to the indicated email address and enable you to log in without needing to change your password.

Accessing the Portal with a Forgotten Password (Existing User)

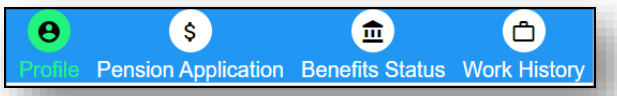
If you forget your password for the Portal, you can retrieve it by clicking "Forgot Password?". This will bring up the following pop-up window where the you can enter your Username:



Once you have entered your Username, you can click "Reset Password". This will send an email containing a password reset link to the email address you used to register for the portal. The link is valid for one hour and directs you to a screen where you can key and confirm a new password. This new password will still have the same requirements as the original one created during registration. After confirming the updated password, you will be redirected to the Login page.

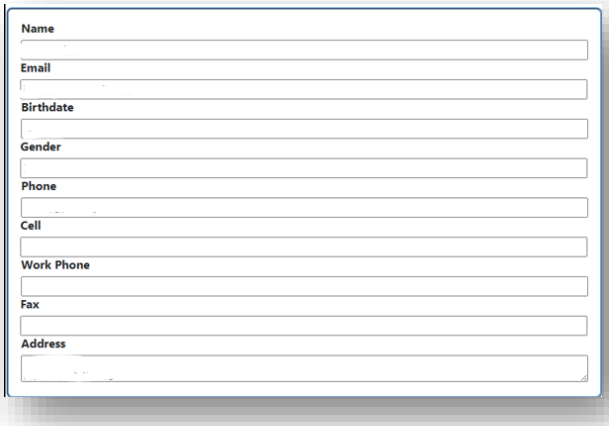
Navigating the Portal

Once you have logged in to the Portal, you can view your personal data across a series of screens. The exact combination of screens available to you depends on your circumstances (e.g., an Active participant may see a screen for their pension benefits accrual whereas a Retiree would see a screen displaying their pension payment history). You can navigate between these screens using the icons in the Navigation Bar, pictured here:



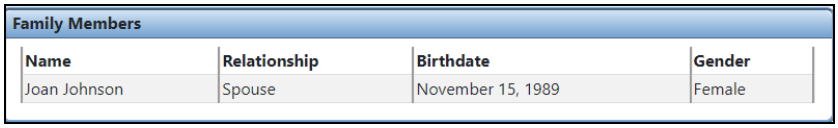
Profile

The Profile screen allows you to view various personal information, as it appears in the Trust Fund's records. The Profile screen is opened automatically upon logging in and appears as follows:



Field Name	Field Description
Name	Participant's first, last, middle name or initial (if present), and suffix (if applicable)
Email	Participant's email address, as it is listed in the Trust Fund's records. This may be different than email used to register for the Portal.
Birthdate	Participant's date of birth
Gender	Participant's gender
Phone	Participant's primary phone number (if given)
Cell	Participant's cell phone number (if given)
Work Phone	Participant's work phone number (if given)
Fax	Participant's fax number (if given)
Address	Participant's address

If you have any enrolled family members, their information will appear in a section of the Profile screen labeled "Family Members". The Family Members section appears as the below image and contains the following information for each enrolled family member:



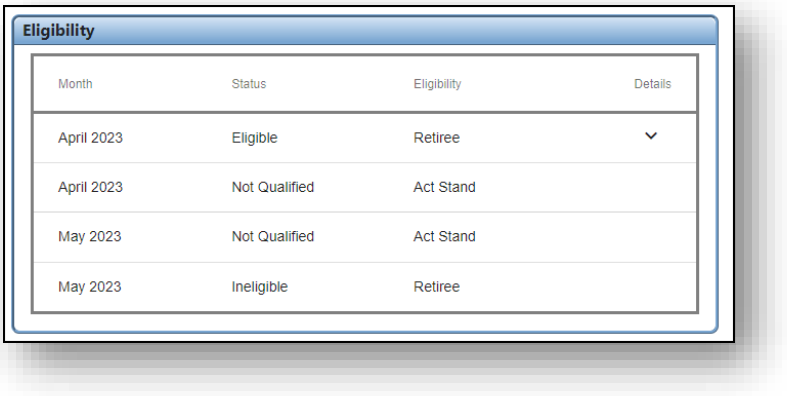
Field Name	Field Description
Name	Family member's first and last name
Relationship	Relationship to the participant (e.g., Spouse, Son, Daughter, etc.)
Birthdate	Family member's date of birth
Gender	Family member's gender

Benefits Status

The Benefits Status screen contains various information related to a participant's health coverage and pension status. It is divided into two sections, Eligibility and Pension Summary.

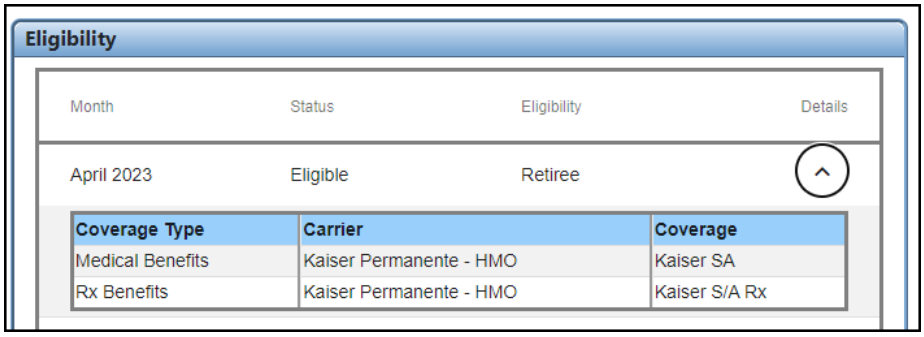
Eligibility

The Eligibility section of the Benefits Status screen contains eligibility information for the current and next eligibility months. This section is depicted in the following image and contains the fields below:



Field Name	Field Description
Month	Eligibility month and year
Status	Current eligibility status for the participant (e.g., Eligible, Ineligible, Not Qualified)
Eligibility	Type of eligibility for the specified coverage (e.g., Retiree, COBRA, Active Standard (Act Standard))
Details	A dropdown that provides coverage information. Only available when the status is Eligible.

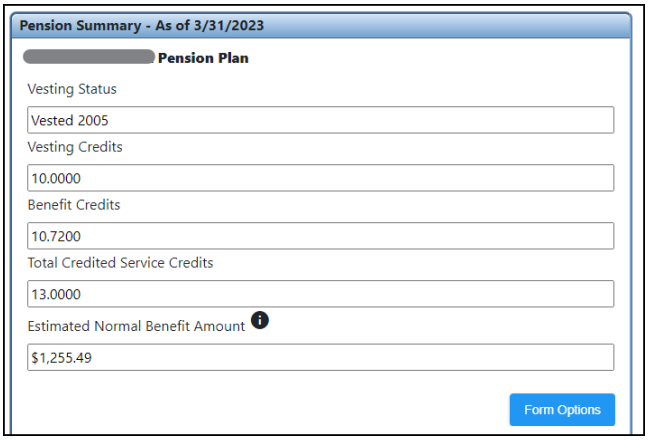
When you are eligible for a particular eligibility month, a Details dropdown becomes available that provides additional coverage information. This dropdown appears as follows and contains the below fields:



Field Name	Field Description
Coverage Type	The type of coverage offered by the plan (e.g., Medical Benefits, Rx Benefits, Dental Benefits, etc.)
Carrier	The carrier that provides the listed coverage (e.g., Kaiser, Anthem Blue Cross, etc.)
Coverage	System designation for the coverage provided by the plan (e.g., Kaiser HMO)

Pension Summary

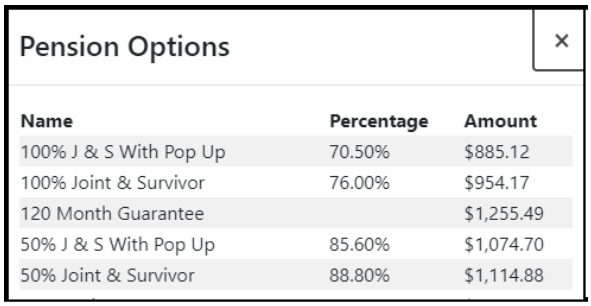
The Pension Summary section of the Benefits Status screen displays the active pension status of the participant as of a stated date, typically the end of the previous remittance cycle. This section is depicted in the following image and contains the fields below:



Field Name	Field Description
Vesting Status	Indicates whether the participant is Vested and, if so, displays the year in which they reached Vested status. This field will be blank if the participant has not reached Vested status.
Vesting Credits	Current accumulated vesting credits, as of the indicated date
Benefit Credits	Current accumulated benefit credits (also referred to as pension credits), as of the indicated date
Estimated Normal Benefit Amount	The estimated monthly benefit amount for the participant as of the indicated date

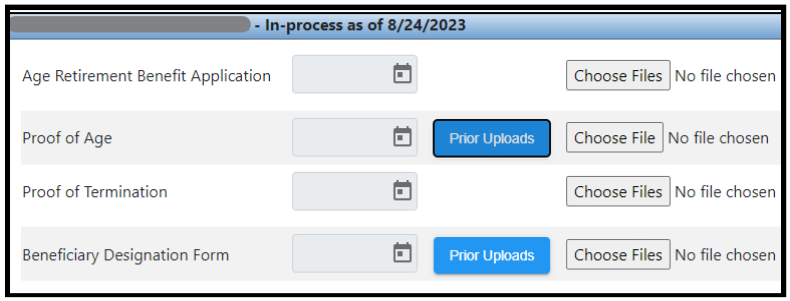
Pension Options

The "Form Options" button, when clicked, opens the Pension Options pop-up. This pop-up contains the various available pension forms, along with their respective benefit amounts for an individual with the same pension status as you, the participant. This pop-up is depicted in the following image:



Pension Application

If you have a pension application "In Process", you have access to the Pension Application screen. From here, you can upload required documents by clicking "Choose Files" next to any of the document fields, select a submission date, re-upload documents that have been rejected with comments (these comments are displayed to the far right of the row representing the rejected document), view previously uploaded document submissions by clicking "Prior Uploads", and submit the uploaded documents by clicking "Submit Documents". This screen is depicted in the following image:



Work History

The Work History screen displays your work history on file. Included below is an example of a Work History screen, along with some of the most common fields.

Agreement Name	Rate Variant	Work Period	Job Class	Reported Hours
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	08/2023	S	168.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	07/2023	S	192.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	06/2023	S	176.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	05/2023	S	168.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	04/2023	S	175.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	03/2023	S	196.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	02/2023	S	-175.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	02/2023	S	175.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	02/2023	S	-196.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	02/2023	S	196.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	02/2023	S	160.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	01/2023	S	176.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	12/2022	S	181.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	11/2022	S	160.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	10/2022	S	184.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	09/2022	S	176.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	08/2022	S	186.00
Service EEs International Union United Service Workers West	CONDO CEC OF SF	08/2022	S	8.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	07/2022	S	182.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	06/2022	S	168.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	05/2022	S	177.00
Service EEs International Union United Service Workers West	CONDO-CREST ROYAL APTS	04/2022	S	169.00

Field	Field Description
Employer Name	The full name of the employer that you worked under
Agreement Name	The full name of the agreement that you worked under
Work Period	The work month for the report in which the you appeared
Job Class	The reported job class that you worked under
Reported Hours	The hours reported on your behalf on the indicated report. When multiple hour types [Standard Time (ST), Overtime (OT), and Double-time (DT)] are recorded for the same job class, the number displayed here will be the sum of those hours.

Pension Payments

The Pension Payments screen contains a record of the pension payments issued to the participant. Please note that this screen is only visible to participants that are either actively being issued pension payments or have received such payments previously. A portion of this screen is depicted in the following image and contains the fields below:

Benefit Period	Issue Date	Payment Reference	Payment Type	Gross	FWT	SWT
07/2023	07/01/2023	EFT	EFT	1,225.46	0.0	0.0
06/2023	06/01/2023	EFT	EFT	1,225.46	0.0	0.0
05/2023	05/01/2023	EFT	EFT	1,225.46	0.0	0.0
04/2023	04/01/2023	EFT	EFT	1,225.46	0.0	0.0
03/2023	03/01/2023	EFT	EFT	1,225.46	0.0	0.0
02/2023	02/01/2023	EFT	EFT	1,225.46	0.0	0.0
01/2023	01/01/2023	EFT	EFT	1,225.46	0.0	0.0
12/2022	12/01/2022	EFT	EFT	1,225.46	0.0	0.0

Field Name	Field Description
Benefit Period	The benefit period for which the payment is being applied
Issue Date	The date the payment was issued
Payment Reference	A system reference for the payment. In the case of payment by check, this will be the check number, whereas an EFT payment will typically use "EFT" for this field.
Payment Type	The format of the payment (e.g., EFT, Check)
Gross	The gross amount of the payment (i.e., total amount before taxes and other deductions)
FWT	Federally Withheld Taxes
SWT	State Withheld Taxes
Health Premium	Deduction to cover the participant's monthly premium for health coverage (if applicable)
Adjustments	Contains any applicable adjustments made to the payment
Lien/Levy	Contains any applicable liens or levies on the payment
Net	Payment amount after taxes and other deductions
Payment Status	Status of the payment (e.g., Issued, Pending, etc.)

Documents

The Documents screen contains links that you can use to access various personal documents, such as benefit vouchers for retirees. The screen has sections for each document type that can be expanded to reveal a list of relevant documents, organized by date. For example, pension payment vouchers appear under the document type "Retiree Benefit Vouchers" and are organized and labeled by issue date. A portion of this screen is depicted in the following image:

