



New York City District Council of Carpenters

# **BENEFIT FUNDS**

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## **NYCDCC Benefit Funds**

Interactive Voice Response System (IVR)  
User Guide

# INTERACTIVE VOICE RESPONSE SYSTEM (IVR)

## How to Log into the IVR and Retrieve Your Member Information

- 1.) Call the NYCDCC Benefit Funds’ Office by dialing 1-800-529-FUND or 212-366-7300
- 2.) Press 1 to access the IVR
- 3.) Press 1 to hear settings in English  
Press 2 to hear settings in Spanish
- 4.) The system will greet you and prompt you to enter your UBC Number and pin  
Enter your 8 digit UBC number  
Enter your pin number then the pound key- \*Note this is the same as the password used for our Member Portal  
Follow the prompts for entering numbers, alpha, and special characters. Key assignments for special characters are as follows:

!	10
@	11
#	12
\$	13
%	14
^	15
&	16
*	17
?	18
+	19

When finished, the system will read the Pin that has been entered. If it is correct press 1

- 5.) You Will Be Brought to The Options Menu

## The ‘Options Menu’

After you have successfully “logged” into the voice response system, you can easily request your member information under the following headings:

Press 1 – To Inquire about Hours Worked
Press 2 – For Welfare Eligibility
Press 3 – For Vacation hours and Vacation Checks
Press 4 – For Pension Information
Press 5 – For Welfare Claims
Press 6 – For Frequently Used Forms
For Questions about Your Annuity Contact Prudential at 877-778-2100

## Option 1 - Inquire on Hours Worked

After pressing 1 and selecting Hours Worked from the Options Menu, you have access to the following information:

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## “Hours Worked Menu”

<p>Press 1 – For Total Hours Worked This Year You will hear your total hours for the year as of the most recent closing date. press 1 to have a printout sent to your home press 2 to return to the hours worked menu press * to return to the options menu</p>
<p>Press 2 – For Total Hours Worked Last Year You will hear your total hours worked previous year press 1 to have a printout sent to your home press 2 to return to the hours worked menu press * to return to the options menu</p>
<p>Press 3 – For Your Most Recent Hours Reported You will hear your total hours worked and the month ending work date reported press 1 to have a printout sent to your home press 2 to return to the hours worked menu press * to return to the options menu</p>
<p>Press 4 – To inquire on Hours Worked During Any Period You will be prompted to enter the beginning date and ending date for the specific period using month/day/year format. For example, for January 1, 2002, press or say “zero, one, zero, one,” “two, zero, zero, two.” You will then hear your total hours worked for the period press 1 to have a printout sent to your home press 2 to return to the hours worked menu press * to return to the options menu</p>
<p>Press * – To return to the options menu press the star key</p>

## Option 2 - Retrieving Eligibility Status

After pressing 2 and selecting Welfare Eligibility Status from the Options Menu, you have access to the following information:

## “Eligibility Menu”

<p>Press 1 – To Inquire Member Eligibility Status If you are eligible you will hear the date through which you are eligible for Welfare Benefits based upon the hours in your eligibility bank with the banked hours available press 1 to have a printout sent to your home press 2 to return to the eligibility menu press * to return to the options menu</p> <p>If you request Eligibility Status, and you are ineligible you will hear “based upon your hours worked we have determined you are ineligible for welfare benefits” press 0 to be transferred to a member services representative (during business hours) press 1 to return to the eligibility menu press * to return to the options menu</p>
<p>Press 2 – Dependent Eligibility Status You will be asked to enter the date of birth of the dependent. For example for January 1, 2002, enter “zero, one, zero, one,” two zero, zero, two”</p>

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<p>If the dependent is <b>eligible</b> for welfare benefits you will hear the following “we can verify that the specified dependent is eligible.”</p> <ul style="list-style-type: none"><li>press 1 to have a printout sent to your home</li><li>press 2 to return to the eligibility menu</li><li>press * to return to the options menu</li></ul> <p>If the dependent is <b>not eligible</b> for welfare benefits you will hear the following “we’ve determined that the specified dependent is not eligible for welfare benefits.” And you will be returned to the options menu.</p>
<p>Press 3 – Hours in Your Eligibility Bank</p> <p>You will hear the hours in your eligibility banked</p> <ul style="list-style-type: none"><li>press 1 to have a printout sent to your home</li><li>press 2 to return to the eligibility menu</li><li>press * to return to the options menu</li></ul>
<p>Press * – return to the Options Menu</p>

### Option 3 - Retrieving Vacation Hours and Vacation Check Information

After pressing 3 and selecting Vacation Information, from the Options Menu you have access to the following information:

#### **“Vacation Hours and Vacation Check Information Menu”**

<p>Press 1 – Total Hours After Last Vacation Statement</p> <p>If you request Total Hours Worked After Last Vacation Statement, you will hear the hours and the worked-through date.</p> <ul style="list-style-type: none"><li>press 1 to have a printout sent to your home</li><li>press 2 to return to the vacation menu</li><li>press * to return to the options menu</li></ul>
<p>Press 2 – Dates and Amounts of Last 3 Checks beginning with most recent check</p> <p>If you request Dates and Amounts of your Last Three Vacation Checks you will hear the dollar amount and date of your last three vacation checks.</p> <ul style="list-style-type: none"><li>press 1 to have a printout sent to your home</li><li>press 2 to return to the vacation menu</li><li>press * to return to the options menu</li></ul>
<p>Press 3 – Estimated Amount of Your Next Check</p> <p>If you request an Estimated Amount of your Next Vacation Check you will hear the estimated dollar amount of your next vacation check based on your credited hours.</p> <ul style="list-style-type: none"><li>press 1 to have a printout sent to your home</li><li>press 2 to return to the vacation menu</li><li>press * to return to the options menu</li></ul>

### Option 4 - Retrieving Pension Information

After pressing 4 and selecting Pension Information from the Options Menu, you have access to the following information:

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## “Pension Information Menu”

### Press 1 – Vested Status

If you request Vested Status, and you are vested you will hear that you are vested and hear an estimate of your monthly pension payment if you retire at age 55 and age 65.

press 1 to have a printout sent to your home

press 2 to return to the pension menu

press \* to return to the options menu

If you request Vested Status, and you are not vested you will hear “You are not vested and will incur a permanent break in service if you have not worked 300 hours in a calendar year by {spoken date}.”

press 1 to have a printout sent to your home

press 2 to return to the pension menu

press \* to return to the options menu

### Press 2 – Total Contributions, Vesting Credits, and Benefit Credits

If you request Total Contributions, Vesting and Benefit Credits, you will hear your number of vesting credits, benefit credits figure, and total estimated contribution dollars in your account.

press 1 to have a printout sent to your home

press 2 to return to the pension menu

press \* to return to the options menu

### Press 3 – Estimated Monthly Pension Payment

If you request an Estimated Monthly Pension Payment, you will hear the estimated monthly pension payment amount at your retirement age.

press 1 to have a printout sent to your home

press 2 to return to the pension menu

press \* to return to the options menu

### Press 4 – Printed Copy of Your Pension History

If you request a Print-out of Your Pension History Mailed to Your Home, you will hear that your request has been processed and you will automatically be returned to the pension menu.

### Press 5 – Print out of Available Pay-out Options

If you request a Print-out of Available Pay-out Options Mailed to Your Home, you will be asked to enter or speak your estimated effective date of retirement using month/day/year format. For example, for January 1, 2002, press or say “zero, one, zero, one,” “two, zero, zero, two.” You will then hear that your request has been processed and automatically be returned to the pension menu.

## Option 5 - Welfare Claims

After pressing or saying 5 (five) in response to the Options Menu prompt for Welfare Claims, you have the following options on the Welfare Claims Menu:

## “Welfare Claims Menu”

### Press 1 – Most Recent Optical Claims

If you request Most Recent Optical Claims, you will be asked “for member, press 1” OR “for dependent, press 2.” Then you will hear the check date and amount of the most recent optical claim in the current plan year if you selected member, OR be asked to enter the date of birth of the dependent if you selected dependent. The

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<p>date format, for example, for January 1, 2002, is entered by pressing “zero, one, zero, one,” “two zero, zero, two.” You will then hear the check date and amount of the most recent optical claim in the current plan year for the dependent.</p> <p>press 1 to have a printout sent to your home press 2 to return to the Welfare Claims menu press * to return to the options menu</p>
<p>Press 2 – To review the Five Most Recent Disability Checks If you request Five Most Recent Disability Checks, you will hear the check dates and amounts of the five most recent disability claim checks.</p> <p>press 1 to have a printout sent to your home press 2 to return to the Welfare Claims menu press * to return to the options menu</p>
<p>Press 3 – Most Recent Hearing Claim If you request Most Recent Hearing Claims, you will be asked “for member, press 1” OR “for dependent press 2.” You will then hear the check date and amount of the most recent hearing claims in the current plan year if you selected member, OR be asked to enter the date of birth of a dependent if you selected dependent. The date format, for example, for January 1, 2002, is entered by pressing “zero, one, zero, one,” “two, zero, zero, two.” You will then hear the check date and amount of the most recent hearing claim in the current plan year for the dependent.</p> <p>press 1 to have a printout sent to your home press 2 to return to the Welfare Claims menu press * to return to the options menu</p>
<p>Press 4 – Two Most Recent Medicare Reimbursement Checks If you request Two Most Recent Medicare Reimbursement Checks, you will hear the check dates and amounts of the two most recent Medicare reimbursement checks in the current plan year for the member.</p> <p>press 1 to have a printout sent to your home press 2 to return to the Welfare Claims menu press * to return to the options menu</p>

## Option 6 - Frequently Used Forms

After pressing 6 and selecting Frequently Used Forms from the Options Menu you can request to have any of the following forms mailed to your address of record. If you request any of the below Forms, you will be told that the request has been processed.

Then be asked if you are finished ordering forms to “press 1 (one), OR to order another form, “press 2 (two), OR to be returned to the main Options Menu, “press the \* (star) key.”

### **“Frequently Used Forms Menu”**

Press 10 - Beneficiary Card
Press 11 - Vacation Stop Payment Form
Press 12 - Disability Pension Application Package
Press 13 - Pension Application Package

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Press 14 - Weekly Disability Form
Press 15 - Pension Stop Payment Form
Press 16 – Pension FWT Federal Withholding Tax Form
Press 17 – Federal Tax Withholding Form
Press 18 - Change of Address Form
Press 19 - Empire Claim Form
Press 20 - Dependent Enrollment Form

## **Option 7 - For Questions about Your Annuity**

All calls regarding your Annuity need to be handled by Prudential.

Please contact Prudential at 877-778-2100