

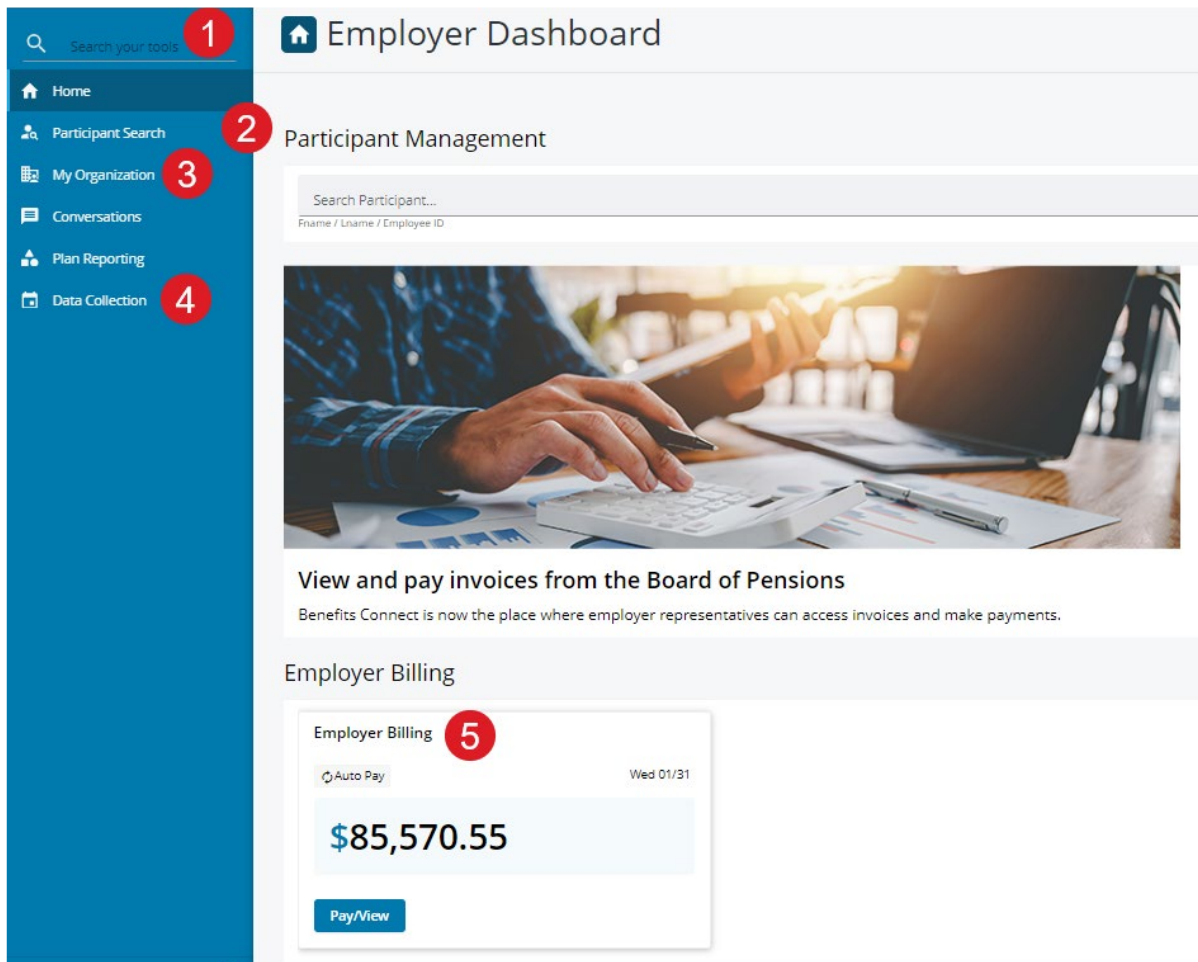
Benefits Connect Employer Quick Start Guide

HOMEPAGE OVERVIEW



THE BOARD OF PENSIONS
OF THE PRESBYTERIAN CHURCH (U.S.A.)

This guide will walk you through the various features and tools available to you on the Benefits Connect website. Whether you are looking to access employee data and reporting, view and pay invoices, contact the Board, or report new employment or employment changes, **Benefits Connect** is your one stop for managing your organization's benefits offerings.



- 1 Blue Navigation Menu.** Quickly access participant search, organization information, secure message conversations with the Board, Employer Agreement, and data collection.
- 2 Participant Management.** Search to see employees' personal information, coverage, and employment information.
- 3 My Organization.** View your registered representative users, participants, and Employer Agreements.
- 4 Data Collection.** View in-progress and complete data collections. Use data collections to submit updates to employment information, such as new hires, salary changes, and terminations.
- 5 Employer Billing.** Click the blue Pay/View button to review invoices and invoice history, and manage one-time or recurring payments.









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FINDING EMPLOYEE DATA



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Benefits Connect has a streamlined interface to access employee data.

	Name	Status	EE#	SIN/SSN	Employer	Gender, Relation	Birth Date
	Employee Name	Active	1234567	*****1234	12345	-	-
	Employee Name	Active	2345678	*****5678	12345	-	-
+ 	Employee Name	Active	3456789	*****2345	12345	-	-
	Employee Name	Active	4567891	*****3456	12345	-	-
+ 	Employee Name	Active	5678912	*****7891	12345	-	-
- 	Employee Name	Active	6789123	*****9876	12345	-	-
	Dependent Name	Eligible Dependent	-	*****8765	-	Male Spouse	Jan 1, 1983
+ 	Employee Name	Active	7891234	*****4321	12345	-	-

- 1 Participant Search.** In addition to the employee search function on the homepage, use the Participant Search function found on the navigation menu.
- 2 Advanced Filters.** Using the Participant Search function, find and look up employee data with one or many category filters. To view a full list of employees, select Active from the Work Status Group.
- 3**  Select the blue icon to view employees' personal information, coverage, and employment information.

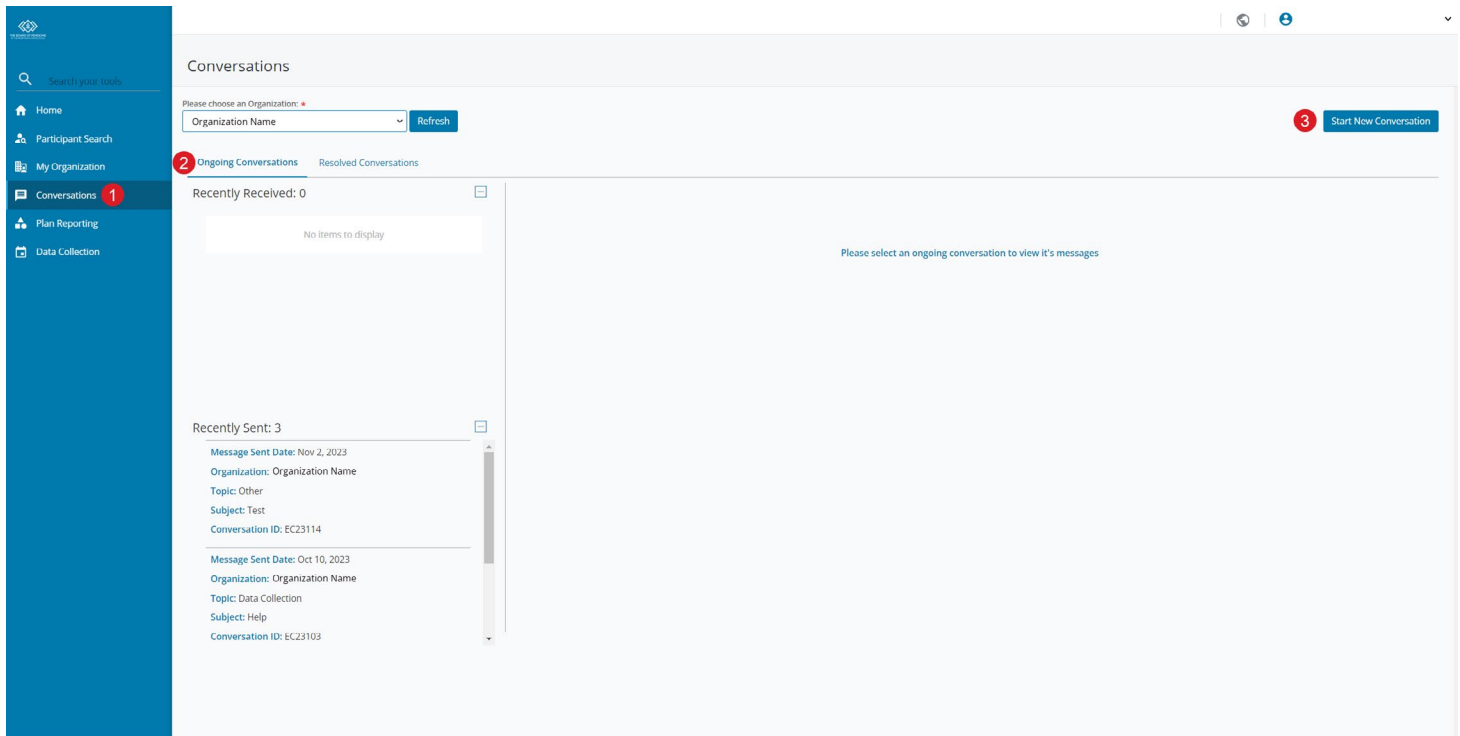
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CONTACTING THE BOARD



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OF THE PRESBYTERIAN CHURCH (U.S.A.)

Through the Conversations feature in Benefits Connect, you can manage and initiate secure conversations with the Board.



- 1 Conversations.** Use the Conversations function on the navigation menu to send secure messages to the Board.
- 2 Ongoing Conversations.** See recently sent and respond to recently received communications with the Board.
- 3 Start New Conversation.** Send a new secure message to the Board.

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BILLING HOME AND VIEW INVOICES

See and manage your organization's invoices using Benefits Connect's easy-to-use interface, and view robust reporting and invoice details.

The screenshot displays the 'Organization Name' page in the Benefits Connect system. The left sidebar contains navigation links: Home, Participant Search, My Organization, Conversations, Plan Reporting, and Data Collection. The main content area is titled 'Organization Name' and includes a search bar. Below the search bar, there are several sections: 'Billing Details' (highlighted with a red circle 1), 'Latest Activity' (highlighted with a red circle 2), 'Invoice Preferences' (highlighted with a red circle 3), 'Messages', 'Currently Billed Participants', and 'Additional Information'. The 'Billing Details' section shows a snapshot of the latest activity, including the last invoice, last payment, and last adjustment. The 'Latest Activity' table shows the following data:

Latest Activity	Date	Amount
Last Invoice	01/01/2024	\$ 1,983.76
Last Payment	12/04/2023	\$ 1,983.76
Last Adjustment	12/01/2023	\$0.00

The 'Invoice Preferences' section lists options for excluding from invoicing, receiving statements, and displaying salary. The 'Currently Billed Participants' section shows 24 participants and a 'View List' button. The 'Additional Information' section shows the group's status as 'Active'.

- 1 Billing Details.** View a snapshot of your latest activity, invoice preferences, currently billed participants, and more from your Billing Details home page.
- 2 Billing Navigation.** Access several tools to help manage invoices and payments, and view transaction reports.
- 3 Download Invoice.** Select Forms, then click Employer Billing Invoice to download a PDF of your monthly invoice.

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PAY INVOICES



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Pay invoices quickly and efficiently through a one-time electronic payment or by setting a recurring payment.

Organization Name

Billing Details

Organization Name

Search Tools

Group: Employer Billing City: City, State

Name: Organization Name (12345) Net Due: \$ 1,983.76

Payment Summary

Current balance	Due date
\$ 1,983.76	01/31/2024
Last payment received	Date received
\$ 1,983.76	12/04/2023

Banking Information

Bank Account Number	Bank Account Nickname	Account Holder
-	-	-
Bank Account Type	Bank Routing Number	Auto payment
-	-	No

Electronic payment history

Transaction Date	Account Nickname	Amount Paid	Bank Account Number	Auto payment	Status	Action
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- 1 **ACH.** Manage payment information by selecting ACH.
- 2 **Add New Account.** Input payment details and set automatic payments.
- 3 **Make one-time electronic payment.** Pay your invoice and conveniently save your banking information for future payments. Note: Saving your banking information will not set a recurring payment.

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VIEW EMPLOYEE ENROLLMENT REPORTING

Download PDF, Excel, or CSV reports to gain insight into your employees' benefits participation with Benefits Connect's plan reporting tools. Set date parameters and filters, and add or remove columns of data to refine your results to best meet your reporting needs.

Search your tools

Home

Participant Search

My Organization

Conversations

Plan Reporting **1**

Data Collection

Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

Report	Description
Employee Extract 2	This report includes employee demographic in the selection criteria as of date selected.
Dependent Extract 3	This report includes dependent data in the selection criteria as of date selected
Benefit Extract 4	This report includes which employees are enrolled in a certain benefit(s) defined in the selection criteria as of date selected
Benefit Change Extract 5	This report contains details about the benefit changes that occurred during the requested time period
Contract Extract Report 6	Contract Extract Report

Bookmarks

Bookmarks provide the user the ability to retrieve copies of reports previously run with all the selection criteria, grid layouts and formats remaining intact. Each Standard Report provides a 'Save' link that when clicked will prompt the user for a Bookmark name to save the report under. The saved report can then be retrieved from the Bookmark page linked below.

Report	Description
Private Bookmarks	Run and manage private bookmarked reports.
Public Bookmarks	Run and manage public bookmarked reports.

- 1 Plan Reporting.** View your employees' benefits participation and reports that support payroll deduction management.
- 2 Employee Extract.** This report includes employee demographic information.
- 3 Dependent Extract.** This report includes dependent data.
- 4 Benefit Extract.** This report includes which employees are enrolled in certain benefit(s) and related employee and employer monthly and annual costs. This report is particularly useful when setting up payroll deductions, as applicable.
- 5 Benefit Change Extract.** This report contains details about the benefit changes that occurred for enrolled employees during the requested time period, such as member life event changes or employment updates which may have led to a member's change in benefits elections.
- 6 Contract Extract Report.** View your Employer Agreement benefit groups, sub groups, and employer contributions for each coverage level of benefits offered.

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REPORT NEW EMPLOYMENT AND CHANGES



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If you need to report new employment or employment changes, Benefits Connect offers a streamlined data collection feature.

My Data Collections

	Target Type	Configuration	Target Code	Name	Status
+ [edit] [menu]	Employer	Termination File	12345 - Organization Name	12345 - Termination File - 1	Initial Data Entry
+ [edit] [menu]	Employer	Salary Change	12345 - Organization Name	12345 - Salary Change - 1	Validation Completed
+ [edit] [menu]	Employer	Hire: Employees	12345 - Organization Name	12345 - New Hire: Employees - 1	Validation In Progress

1 - 3 of 3 items

3 Data Collection +

- 1 Data Collection.** Update employment information quickly by clicking Data Collection from the left blue menu. You will need to know an existing employee's SSN (via Participant Search) or a new employee's benefit group and sub group ID (via Agreements found under My Organization).
- 2 Data Collection Details.** Manage and view data collections by selecting the following icons: + [edit] [menu]
- 3 New Data Collection.** Start a New Data Collection by selecting the blue Data Collection button found at the bottom of the page. Follow a data collection timeline of (1) Definition, (2) Data Entry, (3) Validation, and (4) Review to enter, check, and submit changes.

For comprehensive instructions on how to submit a data collection, refer to the [Data Collection Quick Start Guide](#) on pensions.org.