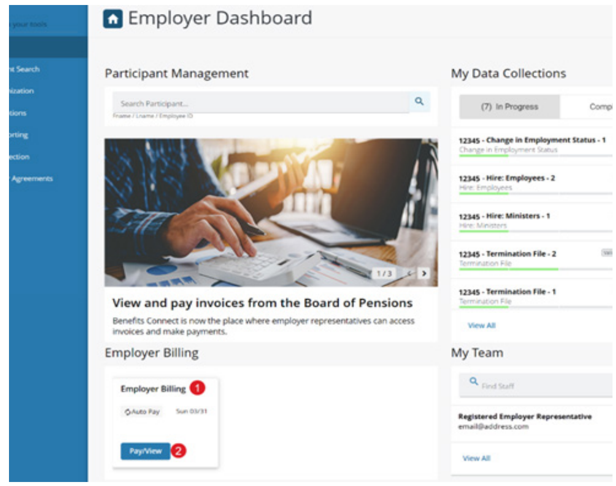
Benefits Connect Employer Quick Start Guide
Billing Tool

HOW TO ACCESS BILLING IN BENEFITS CONNECT

1. Locate the Employer Billing widget on the Employer Dashboard.

2. Click the blue **Pay/View** button.



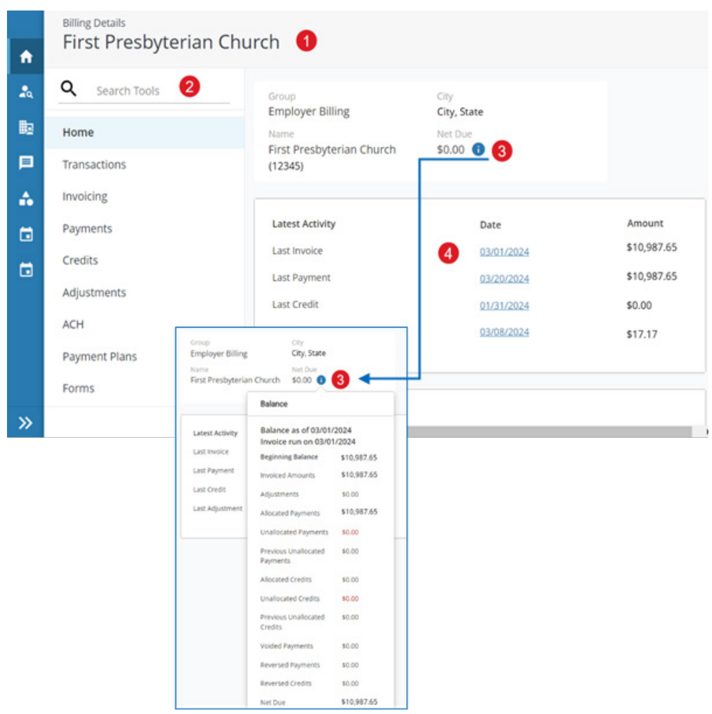
NAVIGATING THE BILLING HOMEPAGE AND MENU

1. This is the **Billing Homepage**.

2. From the white Billing menu, click to view transactions, invoices, ACH payments, and more.

3. Click the blue **i** **icon under Net Due** to view the balance details as of the date the current invoice was generated, including Beginning Balance, Invoiced Amounts, Allocated Payments, and Net Due.

4. The **Latest Activity** box shows a snapshot of last invoice, last payment, last credit, or last adjustment amounts. Click any blue underlined date link to view details.

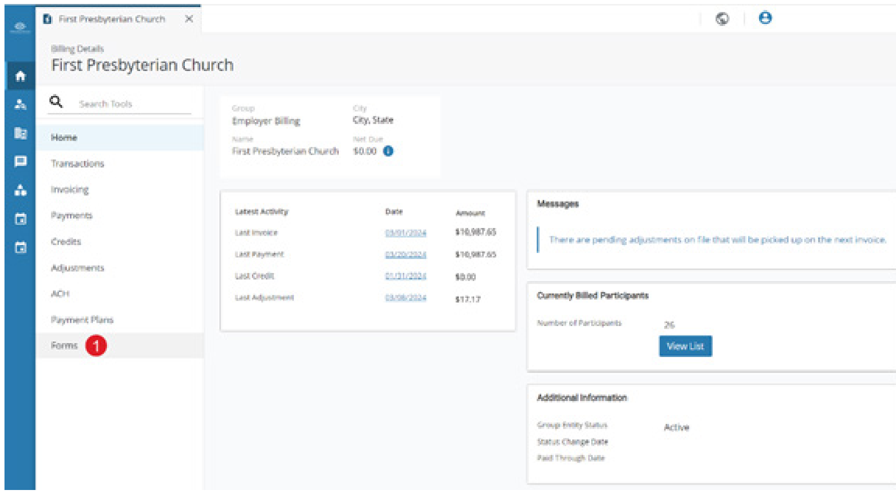


Benefits Connect Employer Quick Start Guide
Billing Tool

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

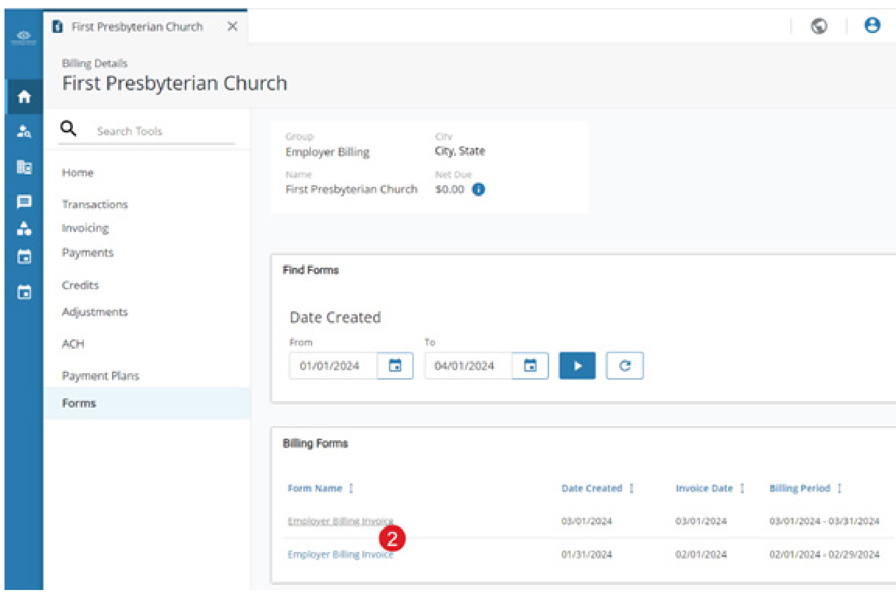
HOW TO DOWNLOAD A PDF INVOICE

1. From the white billing menu, click **Forms**.



2. From the **Billing Forms** box, click the blue underlined **Employer Billing Invoice** on the relevant invoice date row. The PDF invoice will automatically download to your browser or system downloads folder.

Note: You may need to change your browser settings and permissions to allow downloads.



KEY POINTS

- **Billing period** is always one full month of dues and charges relating to all active member enrollments during that period of time.
- PDF invoices will display one member and their related charges per page. For an alternate view and printing ability, see the next page for instructions for printing the invoice as an Excel file.
- Invoices are available on the first day of each month and include all activity processed in Benefits Connect through the last day of the previous month (e.g., June 1 invoice will include all processed activity in Benefits Connect through May 31).

Benefits Connect Employer Quick Start Guide
Billing Tool

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

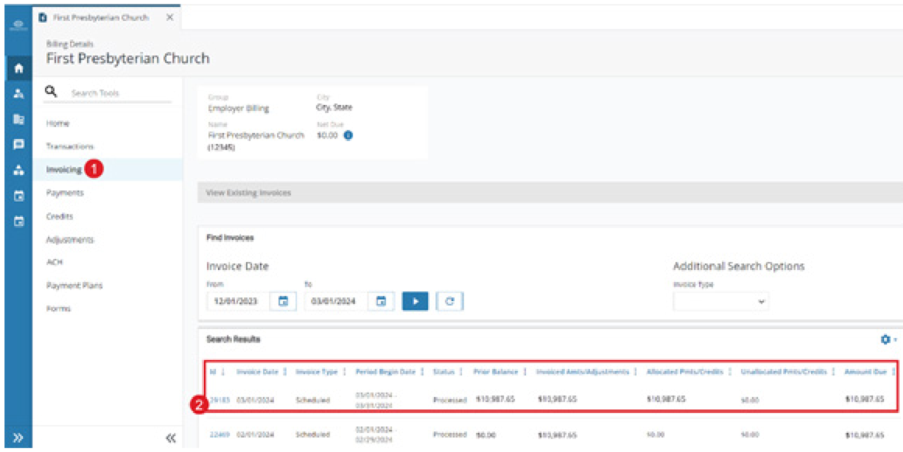
HOW TO DOWNLOAD A PDF INVOICE

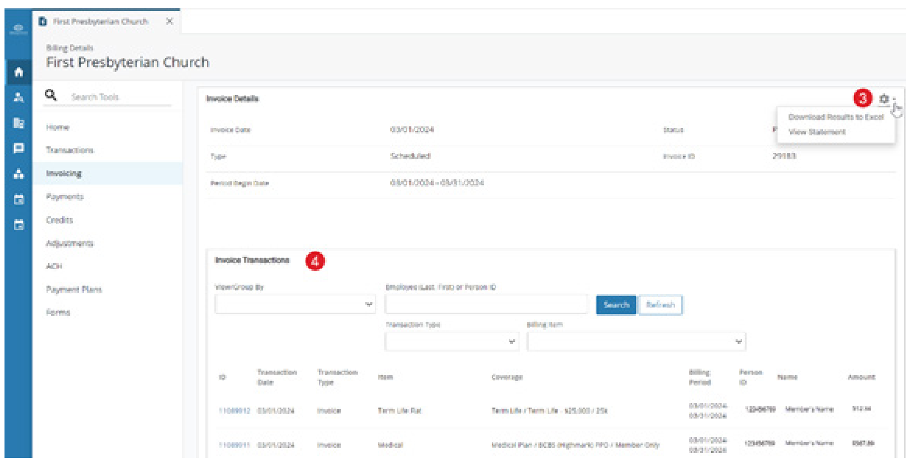
1. From the white billing menu, click **Invoicing**.

2. In the **Search Results** box, click the **blue invoice Id** number on the row corresponding to the period begin date of the monthly invoice to be downloaded.

3. A new Invoice Details box will appear. Click the ⚙ **icon** in the top right corner of the Invoice Details box. Select **Download Results to Excel** to download an Excel file. Click **View Statement** to download a PDF. The Excel or PDF invoice will automatically download to your browser or system downloads folder.

4. Within the **Invoice Details** box, view and search the Invoice Transactions by member, transaction type, and/or by benefit ("billing item").



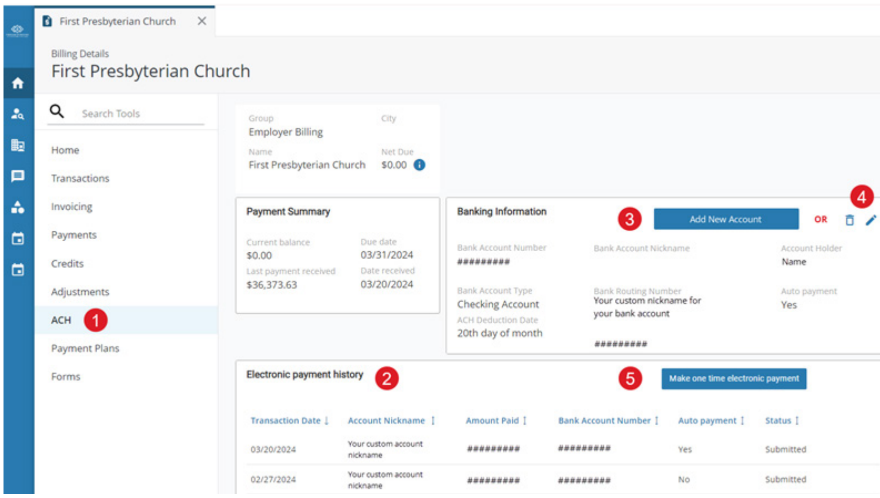


KEY POINTS

- If your invoice doesn't automatically download, you may need to change your browser settings and permissions to allow downloads.
- There will be two ⚙ icons on the invoices page — one in the Search Results box and one in the Invoice Details box. To download the invoice as an Excel file, be sure to click the icon within the Invoice Details box, which appears lower on the page.
- **Billing period** is always one full month of dues and charges relating to all active member enrollments during that period of time.
- **Scheduled** refers to the monthly dues invoice, available on the first of each month.
- **Person ID** is a unique 7-digit number assigned to plan members. This is not a plan member's Social Security number.
- The **Search Results** displays the 3 most recent invoices. To see previous invoices (back to 01/01/2024), update the date fields in the **Find Invoices** box.

Benefits Connect Employer Quick Start Guide
Billing Tool

HOW TO PAY INVOICES



1. From the white billing menu, click **ACH**.

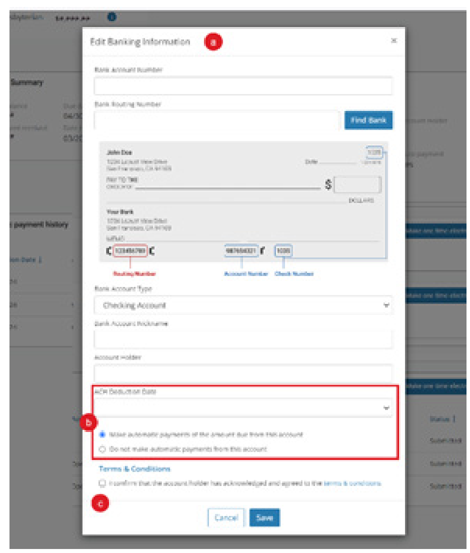
2. In the **Electronic payment history** box, review payments made via Benefits Connect. The Auto payment column indicates yes/no if the payment is related to an automatic recurring payment.

3. The **Banking Information** box displays any saved bank account information and whether there is an automatic payment set up and the related deduction date. Click the blue **Add New Account** button to either (a) enter new banking information or (b) set up a recurring automatic payment.

   A. Enter banking information in the pop-up window.

   B. To set up an automatic payment, click the button next to **Make automatic payments of the amount due from this account**. Then, enter an ACH Deduction Date. To save the entered bank account information without setting up automatic payments, click the button next to **Do not make automatic payments from this account**.

   C. Check the **Terms & Conditions** box, then click the blue **Save** button.



4. If there is existing saved bank account information, you will not see the blue **Add New Account** button on the main ACH page. Instead, click the blue **pencil** icon to edit saved bank account information. Click the blue **trash can** icon to delete saved bank account information.

Benefits Connect Employer Quick Start Guide
Billing Tool

HOW TO PAY INVOICES

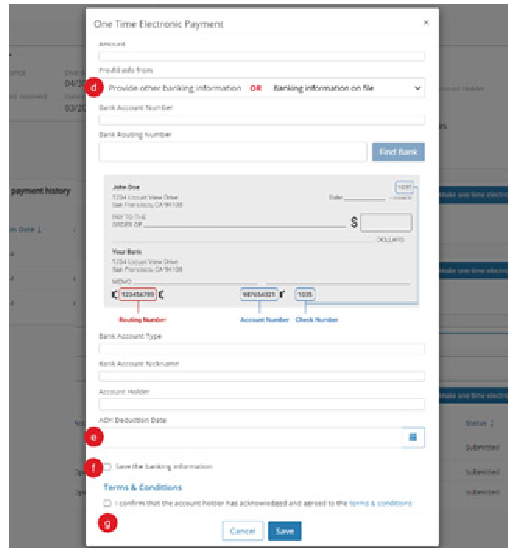
5 Click the blue **Make one-time electronic payment** button in the Electronic payment history box.

D. Choose to make a one-time payment from either the **banking information on file** or use the pop-up form to **provide other banking information**.

E. Enter an **ACH Deduction Date** in the future.

F. Check the box to **Save the banking information**. Leave the box unchecked to submit the payment without saving the banking information.

G. Check the **Terms & Conditions** box, then click the blue **Save** button.



KEY POINTS

- Payments are processed daily at 4 p.m. ET. Any payments submitted after 4 p.m. ET will have a pending status and will be processed the following day.
- Deductions are taken based on the date entered (including same day) for both one-time payments and automatic payments.
- ACH Deduction Dates cannot be set past the 28th of each month to ensure the payment processes prior to the generation of the next month's invoice.
- Automatic payments
  - automatically pay the Net Due on the specified monthly ACH Deduction Date;
  - cannot be skipped. To cancel an automatic payment, you must delete the automatic payment series and set up a new one in the future.
- A submitted payment has an initial status of **Pending**. As needed, take a screenshot or print this page for your records.
- You can save **one** bank account to your Benefits Connect account at any given time, though you may manually enter alternate banking information when submitting one-time payments.

Benefits Connect Employer Quick Start Guide
Billing Tool

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

VIEWING & SEARCHING TRANSACTIONS

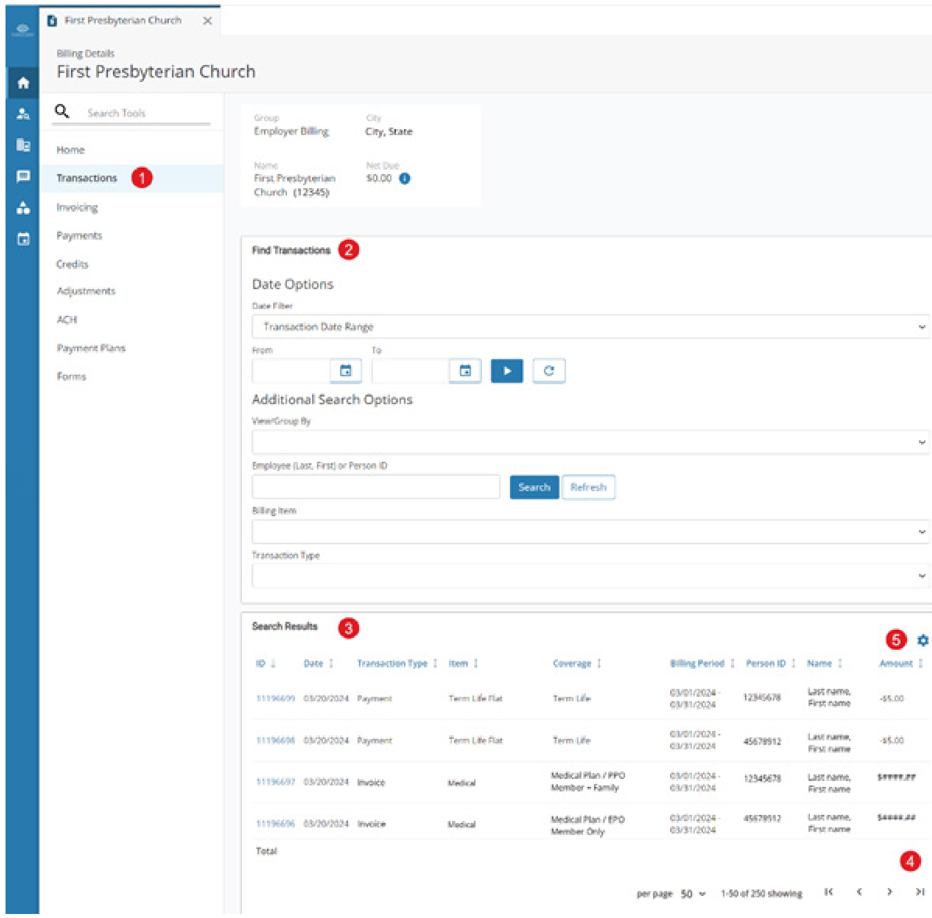
1. From the white billing menu, click **Transactions**. Transactions will show invoiced amounts, applied payments, and credits relating to individual member enrollments.

2. In the **Find Transactions** box, search transactions by a specified date range, employee, benefit (billing item), and/or transaction type.

3. Review transactions for the provided search parameters in the **Search Results** box.

4. Use the arrows in the bottom right corner of the **Search Results** box to show more results.

5. To download the entire transaction history to an Excel file, click the ⚙ icon.



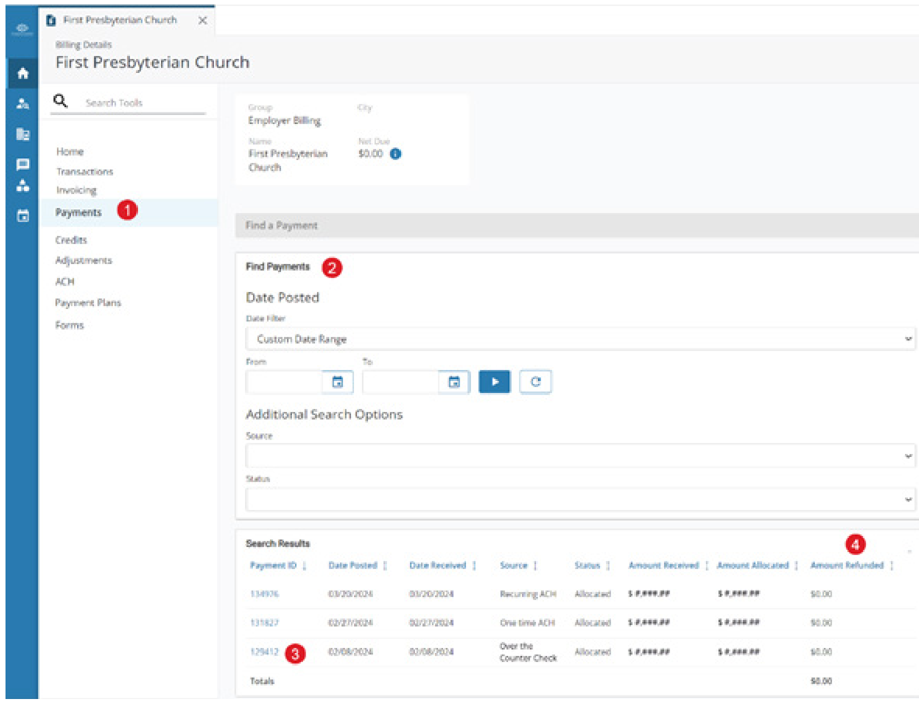
Note: You may need to filter the Excel results based on your unique reporting needs.

KEY POINTS

- The earliest dated transactions available in Benefits Connect are January 2024.

VIEWING & SEARCHING PAYMENTS

1. From the white billing menu, click **Payments**.
2. In the **Find Payments** box, search payments by a specified date range, source (ACH, check), and/or status.
3. Review payments for the provided search parameters in the **Search Results** box. Click the blue **Payment ID number** to review payment details, including an itemized breakdown of how the payment was allocated to relevant charges.
4. Click the **icon** to download the search results to an Excel file.

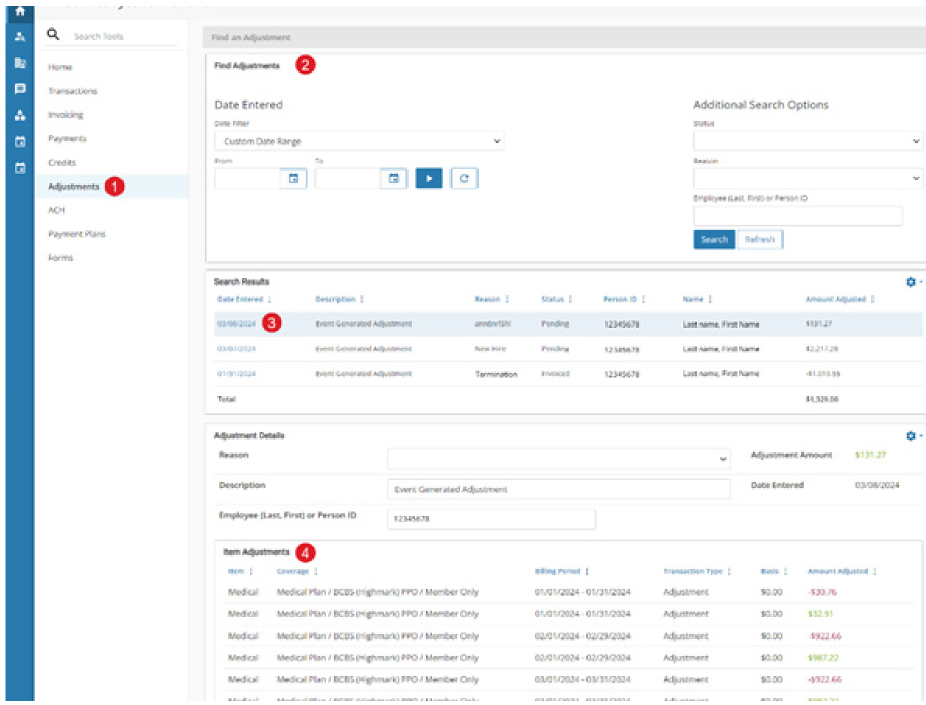


KEY POINTS

- **Recurring ACH** refers to automatic electronic payments via Benefits Connect.
- **One time ACH** refers to manual electronic payments via Benefits Connect.
- **Over the Counter Check** refers to a paper check received via the mail.
- A status of **Allocated** indicates that a payment has been appropriately applied to related charges.
- **Reference number**, when viewing Payment Details for an Over the Counter Check, is the check number.

Benefits Connect Employer Quick Start Guide
Billing Tool

ADJUSTMENTS



1. From the white billing menu, click **Adjustments**.

2. In the **Find Adjustments** box, search adjustments by a specified date range, status, and/or employee.

3. Review adjustments for the provided search parameters in the **Search Results** box. This displays total adjusted amounts billed, in either pending or invoiced status. Click the **blue Date Entered** to review payment details, including an itemized breakdown of charges and credits related to an individual adjustment.

4. In the **Item Adjustments** box, review the amount adjusted, the related benefit or coverage, and the billing period. Green indicates a charge, and red indicates a credit.

KEY POINTS

- Adjustments with a status of **pending** will be applied to the next month's scheduled invoice.
- **Adjustments** are credits or additional charges related to previously billed amounts. Adjustments are driven by completed transactions and events, such as new hires, terminations, and life event changes that take place **after** monthly invoices are generated. Adjustments appear on a following month's invoice.
- Example:
    - March's invoice is generated and available **March 1** for dues effective **March 1-31**.
    - On **March 3**, employer submits a new hire transaction with a benefits effective date of **March 1**. The new hire makes their benefits elections on **March 5**.
    - April invoice includes dues for the new hire's April benefits and adjustments for March benefits dues.

Benefits Connect Employer Quick Start Guide
Billing Tool

VIEWING & SEARCHING CREDITS

KEY POINTS

Most often, the **Credits** section displays future-dated credits related to subsidies from a **dues incentive program**, such as Benefits Grants for Organizing Pastors and Evangelists, or a **determination of a submitted and approved appeal**.