

# Moving Members to a Different Employer Agreement Benefit Group Using Data Collection

## GETTING READY TO SUBMIT EMPLOYER AGREEMENT GROUP ASSIGNMENT DATA COLLECTION

After submitting your Employer Agreement, use the Data Collection tool in Benefits Connect to move participants\* from one group to another effective Jan. 1. It may be helpful to download a PDF copy of your submitted Employer Agreement for reference.

For each participant, you will need:

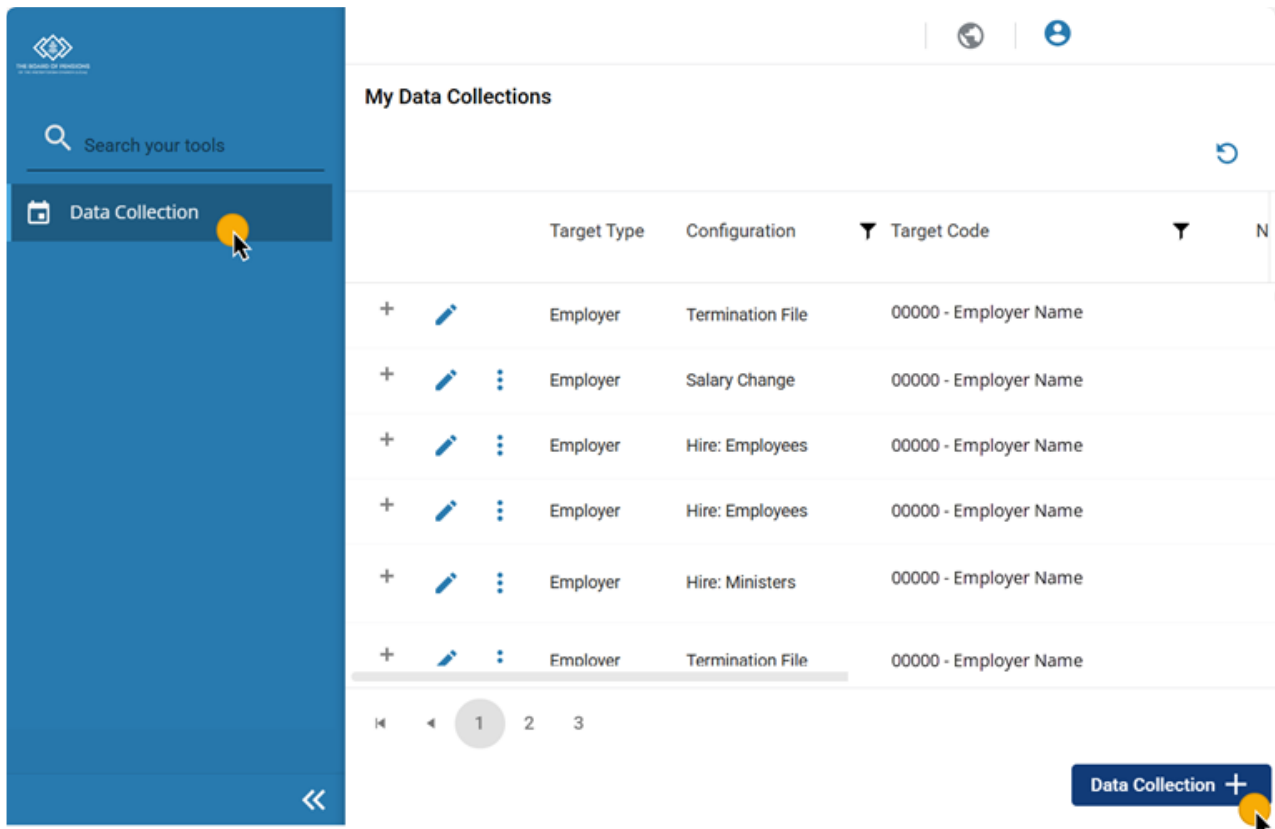
- Nine-digit Social Security number
- Subgroup ID number of the group you are moving the participant to effective Jan. 1

\***Participants** refers to employee(s) or minister(s) to whom you are already offering benefits.

**NOTE:** If you have any employment changes effective any other date than Jan. 1, refer to the [Benefits Connect Employer Quick Start Guide Data Collection Tool \(PDF\)](#) or call the Board of Pensions at 800-PRESPLAN (800-773-7752) (TTY: 711) for support.

## STEP-BY-STEP INSTRUCTIONS FOR SUBMITTING YOUR DATA COLLECTION

From your employer dashboard, click **Data Collection** from the left-hand blue navigation menu. Click the blue **Data Collection +** button in the bottom right corner.



|   | Target Type | Configuration    | Target Code           | N |
|---|-------------|------------------|-----------------------|---|
| + | Employer    | Termination File | 00000 - Employer Name |   |
| + | Employer    | Salary Change    | 00000 - Employer Name |   |
| + | Employer    | Hire: Employees  | 00000 - Employer Name |   |
| + | Employer    | Hire: Employees  | 00000 - Employer Name |   |
| + | Employer    | Hire: Ministers  | 00000 - Employer Name |   |
| + | Employer    | Termination File | 00000 - Employer Name |   |

# Moving Members to a Different Employer Agreement Benefit Group Using Data Collection

## PAGE 1. DEFINITION

- a) Select **Employer Agreement Group Assignment** from the **Data Type** drop-down.
- b) Select **your employer** from the **Employer** drop-down.
- c) The **Name** field will automatically populate with the type, date, and time stamp of your entry.  
We recommend leaving the type, date, and time stamp — but you may also consider entering the name(s) of the participant(s) you're moving.
- d) Click the blue **Save and Continue** button in the bottom right corner.

### Create Data Collection

1 Definition

2 DataEntry

3 Validation

4 Review

Help ?

#### Identification

Data Type \*

Employer Agreement Group Assignment

a

Employer \*

0000 - Presbyterian Church

b

Name \*

Employer Agreement Group Assignment\_000 - ...

c

d

Save and Continue →

# Moving Members to a Different Employer Agreement Benefit Group Using Data Collection

## PAGE 2. DATA ENTRY

Click + **Add Record**.

[← Back to data collections main listing](#)

Employer Agreement Group Assignment\_000\_2025-171512.610-EDT

1 Definition

2 Data Entry

3 Validation

4 Review and Submit

Help ?

+ Add Record

Upload File

Fill From Previous

Show File Summary ☐

VIEW

↻

| SSN                  | Department Id | Effective Date |
|----------------------|---------------|----------------|
| No Records Available |               |                |

0 - 0 of 0 items

← Previous

Validate →

In the Add Record **New Data Change Request** pop-up, enter data in all required fields (indicated by an asterisk):

- 1 Participant's nine-digit **Social Security number** (without dashes)
- 2 Department ID (your **five-digit PIN**)
- 3 Effective date: **01/01/2026**
- 4 **Benefit Sub Group** (refer to the benefit subgroup ID for the appropriate group to move this participant to on your Employer Agreement)

Click the blue **Save** button in the bottom right corner.

New Data Change Request

Expand \ Collapse

Employer Agreement Group Assignment

1 SSN \*

9-digit Social Security number, no dashes

2 Department Id

Your employer 5-digit PIN

3 Effective Date \*

01/01/2026

4 Benefit Sub Group \*

5-digit PIN - group number from your Employer Agreement (ex. 00000-4)

← Cancel

Save →

# Moving Members to a Different Employer Agreement Benefit Group Using Data Collection



## PAGE 2. DATA ENTRY

Your added record will appear as a row of data on the Data Entry page; review your entry for accuracy. To move additional participants, click **+ Add Record** again, and enter information for each additional participant requiring a move.

- To view the full details and subgroup ID, click the **+ sign** on the record row.
- To edit your entry, click the **three vertical dots** on the record row and select **Edit**. Enter your corrected information and click **Save**.
- When you have reviewed and confirmed all entered participant data, click the blue **Validate** button in the bottom right corner.

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Employer Agreement Group Assignment\_00014\_20250723-171512.610-EDT

1 Definition

2 Data Entry

3 Validation

4 Review and Submit

Help ?

+ Add Record

Upload File

Fill From Previous

Show File Summary ☐

VIEW

↺

| SSN  | Department Id | Effective Date |
|--|---------------|----------------|
| <div><div>+ ⋮</div><div>1234567890</div></div> | 00000         | 2026-01-01     |

⏪ ⏩ 1 ⏪ ⏩

1 - 1 of 1 items

← Previous

Validate →

# Moving Members to a Different Employer Agreement Benefit Group Using Data Collection

## PAGE 3. VALIDATION

If you see **No Records Available** on your Validation page, that's a good sign! This message indicates there were no errors or issues found with the data you entered. To review your data entry one last time, click the **Action Required** drop-down and Select **All**.

When you're ready to proceed, click the blue **Continue** button in the bottom right corner.

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Employer Agreement Group Assignment\_000\_2025-210609.202-EDT

1 Definition

2 Data Entry

3 Validation

4 Review and Submit

Help ?

Reject Postpone

Show Criteria Filters

| Issues                 | SSN | Department Id | Effective Date |
|------------------------|-----|---------------|----------------|
| No Records Available ✓ |     |               |                |

Action Requ...  
Action Required  
Action Completed  
No Action  
All

0 - 0 of 0 items

Previous

Continue →

**NOTE:** If you receive an error in the Validation stage, check the following:

- Is your Employer Agreement fully submitted?
- Did you enter the correct participant data (Social Security number, subgroup ID)?
- Did you enter the 01/01/2026 as the effective date?

For further support, call the Board at 800-PRESPLAN (800-773-7752) (TTY: 711). A specially trained representative will be happy to assist you.

# Moving Members to a Different Employer Agreement Benefit Group Using Data Collection

## PAGE 4. REVIEW AND SUBMIT

Click the blue **Submit** button in the bottom right corner.

### [Data Collections](#)

1 Definition

2 Data Entry

3 Validation

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Help ?

Data Collection Information

Data Collection Name

Employer Agreement Group Assignment

Partner Code

Data Type

Employer Agreement Group Assignment

File Summary

Reports

Validation Report.xlsx

Summary Report.xlsx

Back to listing

Submit

Once submitted, you will automatically be returned to the main My Data Collections page. You will see your newly submitted Employer Agreement Group Assignment Data Collection(s) on the listing page with a Completed status in the right column.

### My Data Collections

| Configuration                       | Target Code                       | Name                                       | Status               |
|-------------------------------------|-----------------------------------|--|----------------------|
| Employer Agreement Group Assignment | 00000 - First Presbyterian Church | Employer Agreement Group Assignment_...EDT | Completed            |
| Termination File                    | 00000 - First Presbyterian Church | Termination File_...-EDT                   | Initial Data Entry   |
| Hire: Installed Pastors             | 00000 - First Presbyterian Church | Hire: Installed Pastors_...                | Completed            |
| Hire: Employees                     | 00000 - First Presbyterian Church | Hire: Employees_...                        | Completed            |
| Salary Change                       | 00000 - First Presbyterian Church | Salary Change - ...                        | Validation Completed |