Benefits Connect Employer Guide

Benefits Connect is the benefits website that employers use to select and administer employee benefits under the Benefits Plan of the Presbyterian Church (U.S.A.). Eligible employees also use Benefits Connect to elect their benefits each year.

Follow these steps to get started

STEP 1: DESIGNATE AN EMPLOYER REPRESENTATIVE

(If already registered on Benefits Connect skip to Step 4)

The employer representative is responsible for administering benefits for all employees, including submitting the following updates online through Benefits Connect:

- new employees
- service changes
- employment status changes
- salary changes
- terminations
- post-retirement service

The employer representative also maintains the Employer Profile on Benefits Connect, ensuring that contact information is accurate and up-to-date.

STEP 2: GATHER THE INFORMATION YOU'LL NEED

The employer representative will need the following information to register:

- your Board five-digit employer ID number (PIN) and invoice amount (no $, no comma, include decimal: e.g. 1234.56); this information will be provided by your Employer Services representative
- a valid email address and billing ZIP code

STEP 3: REGISTER ON BENEFITS CONNECT

- Go to pensions.org; click **Login** at the top of the screen next to the Benefits Connect logo (or go directly to pensions.org/benefitsconnect).
- Select **I am a new user** on the Benefits Connect logon page.
- Create User Profile Step 1: select **I am an employer representative**.
- Create User Profile Step 2: complete the employer registration form.
- Check your inbox for the New Registration email; click the link to create your User ID and Password.
- Enter your employer ID (PIN), then create a User ID and Password (click on blue question marks for setup criteria). As part of the Board's multifactor authentication to protect personal data, you will set up a security question and have the option to get a text message with a verification code on your mobile phone.

Important!

To register for and access Benefits Connect you must submit an Employer Agreement to the Board of Pensions. Once the Board receives your agreement, your Employer Profile will be set up and you will be able to register for and access Benefits Connect.

What's next?

Employees will use Benefits Connect to elect or make changes to benefits if they have a qualifying life event and during annual enrollment each year. New employees will also elect benefits through Benefits Connect. Each summer you will be asked to update your Employer Agreement to reflect the benefits selections you will offer employees during annual enrollment and effective the following January 1.

If you have any questions or need assistance, call the Board of Pensions at 800-773-7752 (800-PRESPLAN).

STEP 4: LOG ON TO BENEFITS CONNECT AND VERIFY YOUR INFORMATION

Go to pensions.org; click **Login** at the top of the screen next to the Benefits Connect logo (or go directly to pensions.org/benefits connect).

- On the home page, click the **Employer Agreement** tab at the top.
- Benefits Connect will display the benefits selections outlined in your Employer Agreement. Follow the prompts to review your benefits selections and confirm that they have been entered into the system correctly and reflect your selections and pricing decisions.

The Employer Agreement as displayed on Benefits Connect details the benefits you will offer. **Eligible employees will elect benefits based on the choices described in the Employer Agreement.**

For a summary of the employee log on and enrollment process, view Benefits Connect Quick Start Guide for Employees on pensions.org.

Navigating employee benefits through Benefits Connect

From an employee's first day on the job until the last (and into retirement), his or her benefits enrollment — and many benefits-related changes — are processed through Benefits Connect. Use the chart below as your guide, and find more detailed information on Benefits Connect (search by topic under Resources & Support). If you have questions, contact the Board at 800-773-7752 (800-PRESPLAN).

	WHO DOES WHAT	WHERE/HOW	BY WHEN	NOTE
New employee **OR** **Employee who becomes eligible for benefits**	EMPLOYER completes Member Enrollment, Part 1	Benefits Connect > Manage Employees > Enroll New Employee (Add Employees)	Within 60 days (before or after) date of hire or eligibility, whichever is later	New employee will not appear in Manage Employees until hire date
	EMPLOYEE receives welcome email/ instructions and completes Member Enrollment, Part 2	Benefits Connect > Member Enrollment	Within 60 days of hire or eligibility, whichever is later	Notification is sent to employer when Part 2 is completed
Change in service	EMPLOYER submits service change See NOTE under RSP Contributions on next page	Benefits Connect > Manage Employees > Enroll New Employee (Add Employees)	Within 60 days (before or after) service change	Employee receives email to elect benefits from selection provided by employer
	EMPLOYEE (if now eligible for benefits) receives email invite and completes Member Enrollment, Part 2	Benefits Connect > Member Enrollment	Within 60 days from date of eligibility	Notification is sent to employer when Part 2 is completed
Change in employment status	EMPLOYER submits change in work schedule, position title, or benefit group	Benefits Connect > Manage Employees > Select Employee > Change in Employment Status	Within 60 days of change in employment status	Member will be contacted if the change impacts eligibility for benefits
	EMPLOYEE (if benefits eligibility changes) receives email invite and completes Member Enrollment, Part 2	Benefits Connect > Member Enrollment	Within 60 days from date of eligibility	Notification is sent to employer when Part 2 is completed
Change/Confirm salary	EMPLOYER is required to update or confirm salaries each year	To Confirm Salary: Benefits Connect > Manage Employees > Select Employee > Confirm Salary	Once a year, for every member	Confirmed salary will display immediately (effective as of date submitted)
		To Change Salary: Benefits Connect > Manage Employees > Select Employee > Change Salary	Within 60 days of effective date of salary change	New salary appears in Benefits Connect on effective date
Life event change	MEMBER reports qualifying life event; receives email prompt to elect benefits, update beneficiaries	MEMBER reports qualifying life event; receives email prompt to elect benefits, update beneficiaries MEMBER makes change(s) in benefits coverage and updates beneficiaries	Within 60 days of event (after 60 days, must wait for next annual enrollment)	
	MEMBER makes change(s) in benefits coverage and updates beneficiaries	Benefits Connect > Life Event Enrollment	Within 60 days of event (after 60 days, must wait for next annual enrollment)	Member sees request for supporting docs (if required) on Benefits Connect home page
Termination of employment	EMPLOYER reports termination (along with severance and/or extended benefits, if applicable) See NOTE under RSP Contributions on next page	Benefits Connect > Manage Employees > Select Employee > Termination of Employment	Up to 60 days before or upon termination	Pastor's Participation: benefits end last day worked, or date submitted (whichever is later) Menu options: benefits end last day of the month, or last day of month in which termination is submitted (whichever is later)
Retirement Planning	MEMBER can obtain pension estimate, change investments, access financial planning tools, update beneficiaries, and find information about healthcare coverage options in retirement	Benefits Connect > My Retirement	Anytime	Member contacts the Board to request a retirement packet; submits Retirement Pension Application to the Board 45 days before benefit commencement date
Post-retirement service	EMPLOYER notifies the Board that a retired member of the Benefits Plan has been hired	Benefits Connect > Manage Employees > Post-Retirement Service Registration (see Add Employees)	Within 60 days of date of hire	Presbytery verification is required Member pension benefit may be suspended upon return to active service

Important resources within Benefits Connect:

KNOWLEDGE-BASED ARTICLES:

When working in the Employer Agreement and Manage Employees sections of Benefits Connect, consult the How To articles (listed in the Resources box, to the right of your screen).

RESOURCES & SUPPORT:

Type a few key words in the search box to find information and instructions on that topic. You can also enter a detailed description in the text box, and a Board of Pensions representative will respond.

MY INQUIRIES & REQUESTS:

Provides a chronological list of cases created for your benefits-related transactions that may include additional details and the status of each.

QUICK LINKS:

Try these helpful icons to find what you're looking for.

Online administrative tasks not managed through Benefits Connect

	WHO DOES WHAT:	WHERE/HOW:	BY WHEN:	NOTE:
Payment of dues	EMPLOYER receives initial invoice by mail; can then set up BoardLink account to pay dues	Pensions.org > Available Resources > BoardLink > How to Enroll	Pay invoice before the last business day of the month	Employers can receive monthly reminders, view invoices, check payment status, and view payment history
RSP contributions	EMPLOYER submits to Fidelity on behalf of employee • If using paper Contribution Remittance Forms, will transition in 2018 to the online Simplified Contribution Platform (SCP) • If using Plan Sponsor Webstation (PSW), will not be impacted by this change	Through Fidelity, via PSW or SCP	No later than 15 business days after the payday in which the contributions were withheld by the employer	Delays of up to 10 days can occur during PSW or SCP set up, while banking information is verified Accurate reporting of employee vs. employer contributions is critical Employee/employer contributions should be up to date before reporting service change or termination of employment
	EMPLOYEE can view statements, access planning tools, change investment options, and update beneficiaries online	Visit fidelity.com/atwork > Log In or Register as a New User Also available through Benefits Connect > My Retirement > RSP	Anytime	

Other helpful resources

PENSIONS.ORG:

Provides valuable news and information on plans and programs, along with customized sections for employers and treasurers/administrators. Available resources include Benefits Overviews, booklets and publications, employer toolkits, calculators, and more.

EMPLOYER SERVICES

This dedicated team of knowledgeable professionals at the Board of Pensions can be reached Monday through Friday, 8:30 a.m. to 7 p.m. at 800-773-7752 (800-PRESPLAN).

CHURCH CONSULTANTS

Church Consultants are geographically located throughout the country to provide valuable support to congregations and employers on benefits matters. Visit pensions.org, click the red Menu button at top right, and choose Church Consultants under Employer guidance.