The Pension Boards

United Church of Christ, INC.

BeneTrac how-to

BeneTrac

A benefit management system aimed to help track and manage employee and employer benefit options and selections.

Note:

- **Member ID** = **X**.
- **Annual Salary**: Total Wages + Housing Allowance
- **Ordination date**: X

A DAY IN THE LIFE

This job-aid is to help guide you through using your new benefits management system.

Entering in employee demographic information

When entering in a new employee to the BeneTrac system you must first enter in all their demographic or personal information.

To do so follow these simple instructions:

1. From the Administrator Dashboard, in the Find Records section, click **Add Employee**.
2. Complete the required information.
3. Click **Update**.

Enrolling into benefits

Once an employee has been added to BeneTrac, it's time to start enrolling. Your new hire must enroll within **90 days** of their hire date.

To add coverage for a new employee:

1. Select **Add or View Plan Options: New Hire** from the **MANAGE BENEFIT** button.

   Note: If you are adding benefits for an existing employee who has recently become eligible due to a job status change or to correct an enrollment, select **Add Coverage: {Prompt Effective}**.

You may be prompted to select dependents, answer and gather pre-enrollment questions or documentation.
Select the plan.

2. Click **Continue**.

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3. Review the changes.
   Note: The Effective Date defaults to the transaction date, the date on which the benefits become effective.

Click **I AGREE**.

To decline benefit coverage for the employee:

1. Select **Decline Benefit: {Prompt Effective}**
2. Review the changes.
3. Select a Reason from the drop-down menu.
4. Enter the **Event Date**.
5. Enter a **Comment**.
6. Click **I AGREE**.

To review and finalize the benefits elections after managing all the available benefits for the employee:

1. Click **REVIEW & FINALIZE**.
2. Review the elections listed.
3. To change any of the benefits you selected, click **RETURN TO MY BENEFITS**.
4. Make any necessary changes and click **REVIEW & FINALIZE** again.
5. Review the elections listed.
6. Click **AGREE TO ABOVE AND FINALIZE MY SELECTIONS**.

Note: To undo an action taken by mistake, click **MANAGE BENEFIT** and select **Undo Last Action** to revert the last change to its previous stat

Terminating Employees and their benefits

It is your responsibility when an employee is terminated to mark them properly in the benefit system.

To terminate benefits for an employee:

1. Search for the terminated employee.
2. Click the terminated employee's name.
3. On the left under Actions, click **Terminate Benefits**.

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4. In the **Reason** drop-down menu, select the reason the employee was terminated.
5. Click **TERMINATE**.
6. Click **OK**.

Billing Reports

Billing Reports

*Any changes must be made by the **19th** to be reflected on that month's bill*

It will be up to you to run your billing report before the 20th of each month to preview your estimated charges and verify the invoice accuracy. *Any changes must be made by the **19th** to be reflected on that month's bill.* A final invoice will be sent to you on the ***20th*** of each month. Any further changes after this date will be reflected as an adjustment on the next month's invoice.

To run these reports, go to **Tools | Report Factory** and find your specific location.

1. Enter in your **Run Dates**
   A. **Prior Run Date:** 20th of the previous month.
   Note: The last time you ran the report will auto save in this location.
   B. **Run Date:** 21st of the current month
   C. **Billing Date:** 1st of the current month
2. Click **Run / Save Report**

EXAMPLE

Running a June invoice

Prior Run Date: 5/20/2019
Run Date: 6/21/2019
Billing Date: 6/01/2019

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