



**The Pension Boards**  
United Church of Christ, Inc.



# EMPLOYER PORTAL GUIDE

NETSUITE PORTAL UPDATE APRIL 2023

# NEW PORTAL BENEFITS

Review your bill and contact Member Services if any changes are needed. Changes received in good order will be reflected the next day on the portal.

Make full or partial payments based on your budget and/or preference. Prioritize paying your employee benefit coverage first. Don't let medical, dental or life insurance coverage lapse. New flexible options such as the ability to make multiple partial payments during the same monthly billing cycle will now be available.

Save your payment information securely. No need to enter your credit card information each month.

Review your payment history to reconcile your account. View the outstanding balance, historical payment dates and amounts, benefits and more!

## ACCESS THE NEW EMPLOYER PAYMENT PORTAL

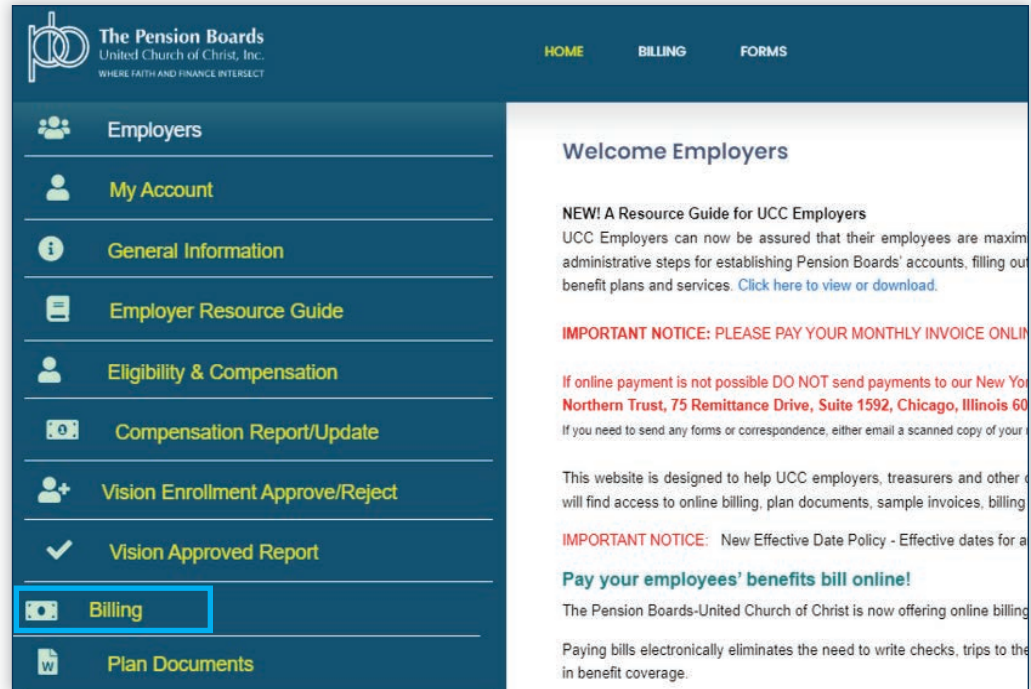
Navigate to [www.pbucc.org](http://www.pbucc.org) and Click **Employer Login** to reach the **Employer Portal Homepage**.

The screenshot displays the website for The Pension Boards, United Church of Christ, Inc. The header features the organization's logo and name on the left, and navigation links for Member Login, Employer Login (highlighted with a red box), and Donate on the right. Below the header is a main navigation menu with links for HOME, FAITH & FINANCE, INVESTMENTS, GIVING, FORMS, and NEWS & RESOURCES. The main content area is divided into two sections. On the left, there is a 'Member Account Login' section with input fields for Member ID and Password, a 'Show Password' checkbox, a 'Log In' button, and links for 'Forgot Member ID?' and 'Forgot / Reset your password?'. On the right, there is a 'Welcome to Your New Homepage!' message with a sub-headline: 'We have listened to your feedback and are committed to making ongoing modifications to provide an informative and easier-to-navigate experience for you.' Below the main content area, there is an 'Important Links' section with links for 'Pension & Benefits', 'Rate Locator', and 'Clergy Wellness'. To the right of this section are three image-based tiles: the first shows a person with a smartphone, the second shows hands holding a heart, and the third shows a document titled 'FINANCIAL WELLNESS' with sub-points like 'Budgeting', 'Savings Plan', and 'Emergency Fund'.

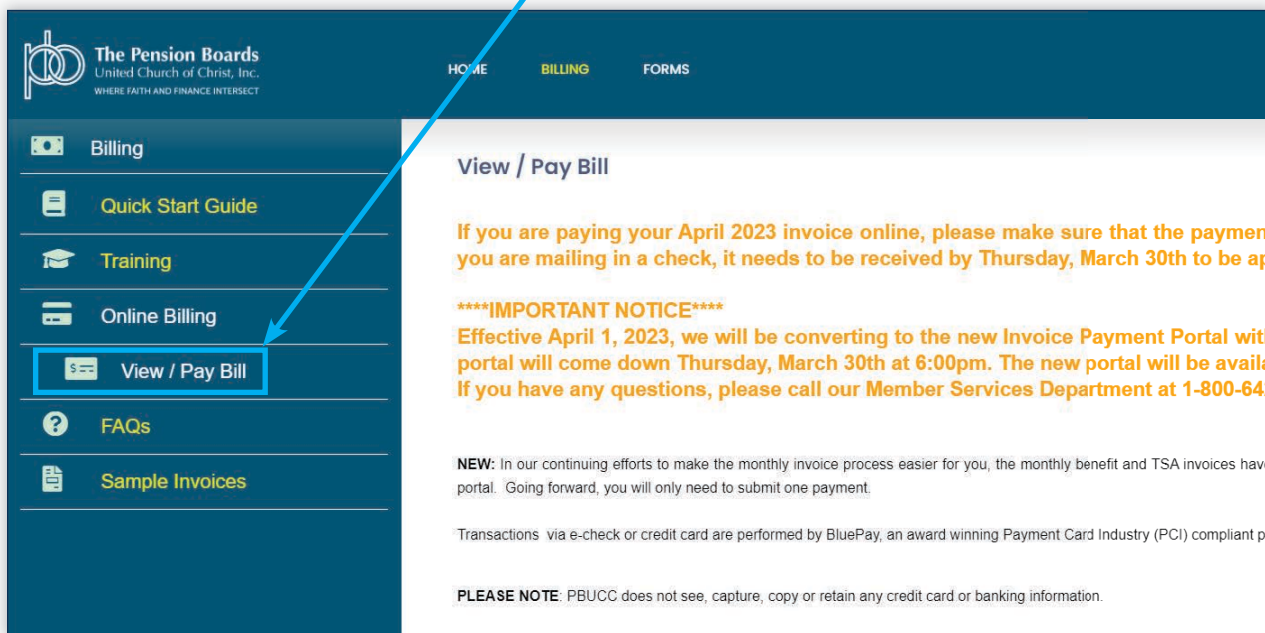
# LOCATE THE PAYMENT PORTAL

The Employer Portal Home Page will open.

From the home page, Select **Billing** from the menu.



When the new billing page opens, Select **View/Pay Bill**



# SIGN INTO THE PAYMENT PORTAL

The Sign-In page will open

For added security, you will be asked to sign in again to reach the payment portal, even if already signed in as an employer.

Access to the new payment portal will remain the same. Please continue to use your current Employer ID and password.

Enter your **Employer ID** and **Password** used to access your PBUCC information.

The screenshot shows the sign-in page for The Pension Boards, United Church of Christ, Inc. The header includes the logo and navigation links for HOME, BILLING, and FORMS. A message at the top says "Please login first". The main heading is "Welcome to the Pension Boards Employer website!" followed by instructions to log in. There are two input fields: "Employer ID (xxxx) \*" and "Password \*". A blue "Sign in" button is below the fields. Links for "New Users Click Here" and "Forgot / Reset your password?" are at the bottom.

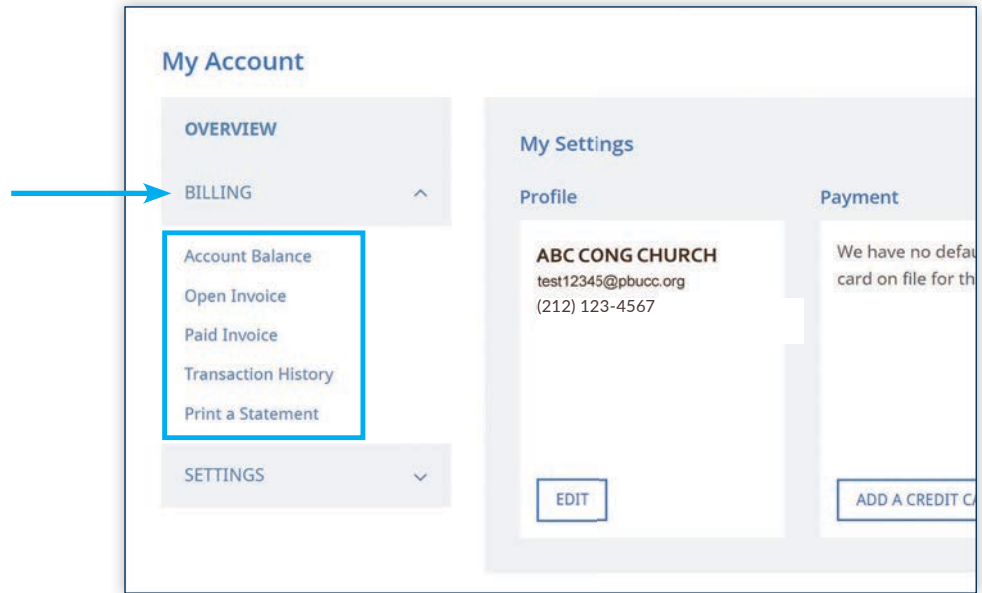
# PAYMENT PORTAL HOME PAGE

After selecting **NetSuite-Billing** from the menu and signing in, the payment portal home page for your account will open, displaying the name and contact information for the organization.

The screenshot shows the "My Account" page. On the left is a sidebar menu with "OVERVIEW", "BILLING", and "SETTINGS". The main content area is titled "My Settings" and is divided into "Profile" and "Payment" sections. The "Profile" section shows "ABC CONG CHURCH" with email "test12345@pbucc.org" and phone "(212) 123-4567". There is an "EDIT" button below. The "Payment" section shows "We have no default credit card on file for this account." with an "ADD A CREDIT CARD" button below. A blue arrow points from the "BILLING" menu item to the "Profile" section.

# ACCESS ACCOUNT PAYMENT AND BILLING OPTIONS

From the Account Home Page, **Select Billing** to drop down a menu of account payment and billing options.



## ACCOUNT BILLING AND PAYMENT MENU OPTIONS

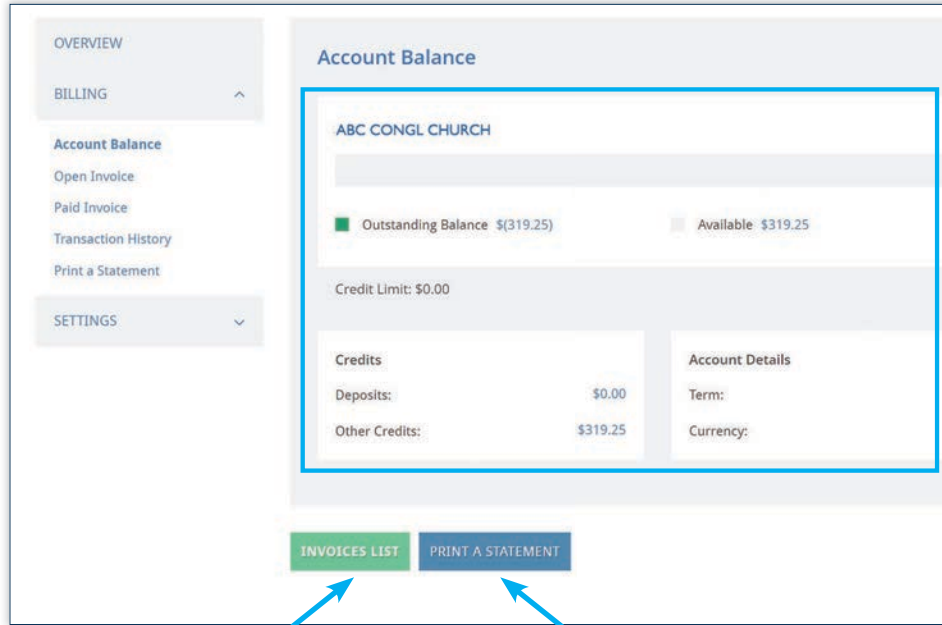
Click the menu links to manage your account:

- |                            |   |
|----------------------------|---|
| <b>Account Balance</b>     | Snapshot of outstanding balance and recent credits.   |
| <b>Open Invoice</b>        | View the current invoice and set-up full or partial payments.                               |
| <b>Paid Invoice</b>        | Look-up and view past invoices by month.  |
| <b>Transaction History</b> | Lookup and View how payments, credits, and other transaction types are applied to invoices. |
| <b>Print a Statement</b>   | Print a Statement of Account as a list of charges and payments by invoice number and date.  |



# ACCOUNT BALANCE

The Account Balance screen displays a snapshot of the current account status including the outstanding balance and any credits available.

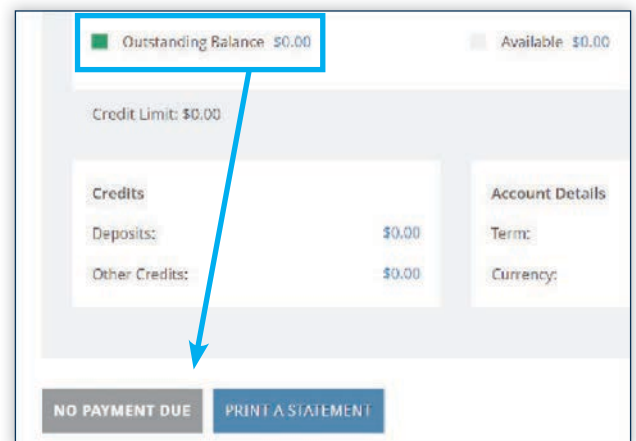
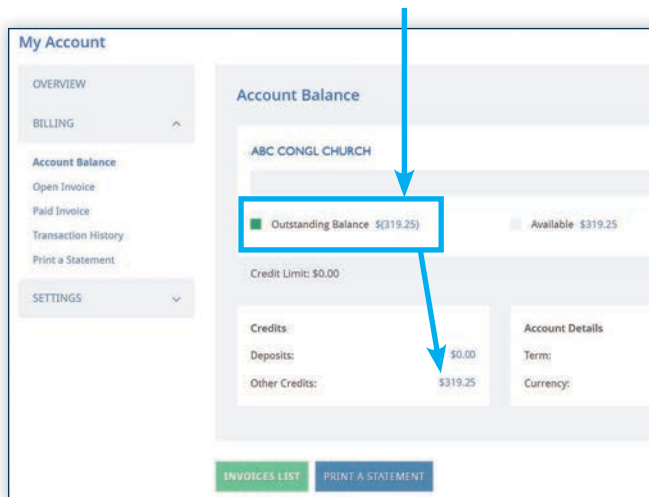


Quick link to view the current open invoice.

Quick link to print a statement of current/past charges.

**CREDITS:** If you see an outstanding balance on the Account Balance Screen reflecting a negative dollar amount (amount in parenthesis), this means there is a credit that can be applied to your next bill.

**\$0 BALANCE:** If there are no open invoices, you will see an outstanding balance of \$0.00 and a designation of, “No Payment Due”.



# OPEN INVOICE: VIEW

Select Grouped by Member or Grouped by Benefit to reconfigure the order of items listed in the Current Month Invoice Detail Section

Open Invoice View displays the full invoice with an Invoice Summary listing current charges at the top of the page.

Scroll Down to view the Current Month Invoice Detail and the Invoice Detail for Overdue Amounts.

**My Account**

- OVERVIEW
- BILLING ^
- Account Balance
- Open Invoice
- Paid Invoice
- Transaction History
- Print a Statement
- SETTINGS v

**Open Invoice**

Grouped By Member | **Grouped By Benefit**

**MAKE A PAYMENT**

**The Pension Boards UCC**  
March 2023 Statement

Date: 2/01/2023  
Due Date: 2/28/2023

Employer Name: ABC CONG CHURCH  
Employer ID: 12345

**Invoice Summary for March, 2023**

Benefit	Month/Year	Amount Due	Subtotal Due	Pay
<b>Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>				
Monthly	March 2023	\$1,668.00		<input type="checkbox"/>
Subtotal Employee Pre-Tax (TSA) Contribution (Annuity Plan)			\$1,668.00	<input type="checkbox"/>
<b>Dental Benefits</b>				
Monthly	January 2023	\$44.25		<input type="checkbox"/>
Monthly	February 2023	\$44.25		<input type="checkbox"/>
Subtotal Dental Benefits			\$88.50	
<b>Total Amount Due</b>			<b>\$1,756.50</b>	<input type="checkbox"/>

**Current Month Invoice Detail for March, 2023**

Benefit	Month/Year	Amount Due	Subtotal Due
<b>JOHN DOE / 7777-777</b>			
Employee Pre-Tax (TSA) Contribution (Annuity Plan) - Monthly	March 2023	\$1,668.00	
Subtotal JOHN DOE / 7777-777			\$1,668.00

**Invoice Detail for Overdue Amounts**

Benefit	Month/Year	Amount Due	Subtotal Due
<b>Dental Benefits</b>			
Monthly	January 2023	\$44.25	
Monthly	February 2023	\$44.25	
Subtotal Dental Benefits			\$88.50

# OPEN INVOICE: ALTERNATE VIEW

If an invoice contains charges for multiple benefits or members. It can be helpful to change how the Current Month Invoice Detail is displayed.

**Open Invoice**

Grouped By Member  Grouped By Benefit

**MAKE A PAYMENT**

**The Pension Boards UCC**  
April 2023 Statement

Date: 3/01/2023  
Due Date: 3/28/2023

Employer Name: ABC CONG CHURCH  
Employer ID: 12345

Invoice Summary for April, 2023

Benefit	Month/Year	Amount Due	Subtotal Due	Pay
<b>Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>				
Monthly	March 2023	\$1,348.75		<input type="checkbox"/>
Monthly	April 2023	\$1,884.49		<input type="checkbox"/>
<b>Subtotal Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>			<b>\$3,233.24</b>	<input type="checkbox"/>
<b>RSA Employee After-Tax Contribution (Annuity Plan)</b>				
Prior Adjustment	See details below	\$283.34		<input type="checkbox"/>
<b>Subtotal RSA Employee After-Tax Contribution (Annuity Plan)</b>			<b>\$283.34</b>	<input type="checkbox"/>
<b>Employer Dues (Annuity plan)</b>				
Monthly	April 2023	\$1,227.12		<input type="checkbox"/>
<b>Subtotal Employer Dues (Annuity plan)</b>			<b>\$1,227.12</b>	<input type="checkbox"/>
<b>RSA Employer Dues (Annuity plan)</b>				
Monthly	April 2023	\$85.01		<input type="checkbox"/>
<b>Subtotal RSA Employer Dues (Annuity plan)</b>			<b>\$85.01</b>	<input type="checkbox"/>
<b>Total Amount Due</b>			<b>\$4,828.71</b>	<input type="checkbox"/>

**Current Month Invoice Detail for April, 2023**

Benefit	Member	Month/Year	Amount Due	Subtotal Due
<b>MIGUEL SANCHEZ / 8888-888</b>				
RSA Employee After-Tax Contribution (Annuity Plan) - Prior Adjustment		March 2023	\$283.34	
RSA Employer Dues (Annuity plan) - Monthly		April 2023	\$85.01	
<b>Subtotal MIGUEL SANCHEZ / 8888-888</b>				<b>\$368.35</b>
<b>MARY JONES / 9999-999</b>				
Employer Dues (Annuity plan) - Monthly		April 2023	\$216.49	
Employee Pre-Tax (TSA) Contribution (Annuity Plan) - Monthly		April 2023	\$216.49	
<b>Subtotal MARY JONES / 9999-999</b>				<b>\$432.98</b>
<b>JOHN B DOE / 7777-777</b>				
Employer Dues (Annuity plan) - Monthly		April 2023	\$1,010.63	
Employee Pre-Tax (TSA) Contribution (Annuity Plan) - Monthly		April 2023	\$1,668.00	
<b>Subtotal JOHN B DOE / 7777-777</b>				<b>\$2,678.63</b>

Select Grouped by Member or

Grouped By Member  Grouped By Benefit

**MAKE A PAYMENT**

**The Pension Boards UCC**  
April 2023 Statement

Date: 3/01/2023  
Due Date: 3/28/2023

Employer Name: ABC CONG CHURCH  
Employer ID: 12345

Invoice Summary for April, 2023

Benefit	Month/Year	Amount Due	Subtotal Due	Pay
<b>Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>				
Monthly	March 2023	\$1,348.75		<input type="checkbox"/>
Monthly	April 2023	\$1,884.49		<input type="checkbox"/>
<b>Subtotal Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>			<b>\$3,233.24</b>	<input type="checkbox"/>
<b>RSA Employee After-Tax Contribution (Annuity Plan)</b>				
Prior Adjustment	See details below	\$283.34		<input type="checkbox"/>
<b>Subtotal RSA Employee After-Tax Contribution (Annuity Plan)</b>			<b>\$283.34</b>	<input type="checkbox"/>
<b>Employer Dues (Annuity plan)</b>				
Monthly	April 2023	\$1,227.12		<input type="checkbox"/>
<b>Subtotal Employer Dues (Annuity plan)</b>			<b>\$1,227.12</b>	<input type="checkbox"/>
<b>RSA Employer Dues (Annuity plan)</b>				
Monthly	April 2023	\$85.01		<input type="checkbox"/>
<b>Subtotal RSA Employer Dues (Annuity plan)</b>			<b>\$85.01</b>	<input type="checkbox"/>
<b>Total Amount Due</b>			<b>\$4,828.71</b>	<input type="checkbox"/>

**Current Month Invoice Detail for April, 2023**

Benefit	Member	Month/Year	Amount Due	Subtotal Due
<b>RSA Employee After-Tax Contribution (Annuity Plan)</b>				
Prior Adjustment	MIGUEL SANCHEZ / 8888-888	March 2023	\$283.34	
<b>Subtotal RSA Employee After-Tax Contribution (Annuity Plan)</b>				<b>\$283.34</b>
<b>Employer Dues (Annuity plan)</b>				
Monthly	MARY JONES / 9999-999	April 2023	\$216.49	
Monthly	JOHN B DOE / 7777-777	April 2023	\$1,010.63	
<b>Subtotal Employer Dues (Annuity plan)</b>				<b>\$1,227.12</b>
<b>Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>				
Monthly	MARY JONES / 9999-999	April 2023	\$216.49	
Monthly	JOHN B DOE / 7777-777	April 2023	\$1,668.00	
<b>Subtotal Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>				<b>\$1,884.49</b>
<b>RSA Employer Dues (Annuity plan)</b>				
Monthly	MIGUEL SANCHEZ / 8888-888	April 2023	\$85.01	
<b>Subtotal RSA Employer Dues (Annuity plan)</b>				<b>\$85.01</b>

Grouped by Benefit to change how the detail is organized.



# OPEN INVOICE: SET-UP PAYMENT

Set-Up a payment in **Open Invoice View** by selecting which amounts you would like to pay.

Once payment selections are complete, **click Make A Payment** to continue.

To make a partial payment, **select Individual boxes** next to the payment amount.

*Note: Past due amounts must be paid prior to current month*

The screenshot shows the 'Open Invoice' section of an employer portal. On the left is a navigation menu with 'My Account', 'OVERVIEW', 'BILLING', 'Open Invoice', 'Paid Invoice', 'Transaction History', 'Print a Statement', and 'SETTINGS'. The main area displays 'The Pension Boards UCC March 2023 Statement' for 'ABC CONG CHURCH 12345'. It includes a table for 'Invoice Summary for March, 2023' with columns for Benefit, Month/Year, Amount Due, Subtotal Due, and Pay. A 'MAKE A PAYMENT' button is located at the top right.

Benefit	Month/Year	Amount Due	Subtotal Due	Pay
<b>Employee Pre-Tax (TSA) Contribution (Annuity Plan)</b>				
Monthly	March 2023	\$1,668.00		<input type="checkbox"/>
Subtotal Employee Pre-Tax (TSA) Contribution (Annuity Plan)			\$1,668.00	<input checked="" type="checkbox"/>
<b>Dental Benefits</b>				
Monthly	January 2023	\$44.25		<input type="checkbox"/>
Monthly	February 2023	\$44.25		<input type="checkbox"/>
Subtotal Dental Benefits			\$88.50	
<b>Total Amount Due</b>			<b>\$1,756.50</b>	<input checked="" type="checkbox"/>

To pay the Total, **Select Total Amount Due.**


# OPEN INVOICE: CREDIT CARD PAYMENT

**Payment Method**

**Credit / Debit Card** Others

Required \*

Credit Card Number \*

Expiration Date \*

1 2023

Name on Card \*

Make this my default credit card

[Learn more about safe and secure shopping](#)

BACK SUBMIT

To make a credit card payment, **Enter** your **Payment information**

New! If you are submitting payment via a Credit or Debit Card, enter your information and check the **“Make this my default credit card”** box to safely store your information for future payments!

Once complete, select, **Submit**.

## OPEN INVOICE: E-CHECK PAYMENT

To make a payment via E-Check, **Select “Others”** as the payment method and **click the E-Check button**. Next, **click “Submit”** to reach the **Billing Information** page.

The screenshot displays the 'Make A Payment' interface, specifically the '1. PAYMENT AND REVIEW' step. The main heading is 'PAYMENT AND REVIEW'. Under 'Payment Method', there are two buttons: 'Credit / Debit Card' and 'Others'. The 'Others' button is highlighted with a blue box. Below this, there is a radio button labeled 'Select' with a blue box around it. An arrow points from the 'Others' button to the 'Select' radio button. Below the radio button is a box containing the 'echeck' logo. At the bottom of the main form area, there is a blue 'BACK' button and a green 'SUBMIT' button. To the right of the main form is a 'PAYMENT SUMMARY' table. Below the table is a green 'SUBMIT' button. A blue arrow points from the top of the page down to the 'Others' button, and another blue arrow points from the 'Select' radio button down to the 'SUBMIT' button at the bottom of the page.

**Make A Payment**  
1. PAYMENT AND REVIEW

**PAYMENT AND REVIEW**

**Payment Method**

Credit / Debit Card Others

Select

**echeck**

You will be redirected to your external payment site after reviewing your order on next step. Once your order is placed, you will return to our site to see the confirmation of your purchase.

**BACK** **SUBMIT**

**PAYMENT SUMMARY**

Invoices (6)	\$3,479.95
Deposits Subtotal	\$0.00
Credits Subtotal	\$0.00
Payment Total	\$3,479.95

**SUBMIT**

# OPEN INVOICE: E-CHECK PAYMENT

On the Billing Information page, fill in the contact information requested and **Select, Continue.**

Billing Information	
First Name:	John
Last Name:	Doe
Company Name:	ABC CONG CHURCH
Country:	United States
Address:	475 Riverside Drive
City:	Anytown
State/Province:	New York
Zip/Postal Code:	10115
Phone Number:	
Fax Number:	
Email Address:	test12345@pbucc.org

Order Information	
Order Amount:	3479.95

Electronic Check	
Name on Bank Account:	
Bank Account Number:	
Bank Routing Number:	

Add Banking information and **Select, Complete Order** to pay the invoice amount.

*Note: Saving payment information for later use is not currently available for E-Check*

# PAID INVOICE

**My Account**

- OVERVIEW
- BILLING ^
- Account Balance
- Open Invoice
- Paid Invoice**
- Transaction History
- Print a Statement
- SETTINGS v

### Paid Invoice

Invoice Date:

Grouped By Member  Grouped By Benefit

**The Pension Boards UCC**  
January 2023 Statement

Date: 12/01/2022  
Due Date: 12/28/2022

Employer Name: ABC CONG CHURCH  
Employer ID: 12345

Invoice Summary for January, 2023			
Benefit	Month/Year	Amount	Subtotal
Employee Pre-Tax (TSA) Contribution (Annuity Plan)	Monthly		
	January 2023	\$216.48	
Subtotal Employee Pre-Tax (TSA) Contribution (Annuity Plan)			\$216.48
<b>Total Amount</b>			<b>\$216.48</b>

Invoice Detail for January, 2023			
Benefit	Month/Year	Amount	Subtotal
JOHN DOE / 7777-777			
Employee Pre-Tax (TSA) Contribution (Annuity Plan) - Monthly	January 2023	\$216.48	
Subtotal JOHN DOE / 7777-777			\$216.48

To review any invoices **Select a Month** using the Invoice Date box.

The Paid Invoice page is similar to Open Invoice. Choose **Grouped by Member** or **Grouped by Benefit** to toggle how detail is displayed.

The **Paid Invoice** screen also provides an Invoice Summary and Invoice Detail section.



# TRANSACTION HISTORY

Transaction History provides a look-up function to track how payments, credits and other transactions have been applied. Different viewing options are available.

1. Select a date range

2. Select a Record Type from the drop-down menu or choose to Show All:

Number	Date		Status
Payment #PYMT3505	03/06/2023		Cancelled
Payment #PYMT3504	03/05/2023	\$1,348.75	Cancelled
Payment #PYMT3442	02/14/2023	\$11,087.17	Deposited

# TRANSACTION HISTORY

A list of transactions with the chosen record type and date range will populate.

**My Account**

Transaction History

From 2023-01-01 to 2023-03-07 Show all record types

Number	Date	Amount
Payment #PYMT3505	03/06/2023	\$85.01
Payment #PYMT3504	02/05/2023	\$1,348.75
Payment #PYMT3442	02/14/2023	\$11,087.17

3. Click an individual **Payment Number** to open a list of invoices where that payment or transaction has been applied

**My Account**

Payment #PYMT3442

Date: 02/14/2023

Status: Deposited

Account Balance

Open Invoice

Paid Invoice

Transaction History

Print a Statement

SETTINGS

INVOICES

Number	Date	Disc	Amount
Invoice #INV383817	09/01/2022	\$0.00	\$216.48
Invoice #INV372956	09/01/2022	\$0.00	\$1,010.63
Invoice #INV372955	09/01/2022	\$0.00	\$202.13
Invoice #INV372953	09/01/2022	\$0.00	\$216.49
Invoice #INV372954	09/01/2022	\$0.00	\$202.13
Invoice #INV363075	10/01/2022	\$0.00	\$202.13
Invoice #INV363074	10/01/2022	\$0.00	\$216.49
Invoice #INV363076	10/01/2022	\$0.00	\$202.13
Invoice #INV363077	10/01/2022	\$0.00	\$1,010.63
Invoice #INV381841	10/01/2022	\$0.00	\$216.48
Invoice #INV354200	11/01/2022	\$0.00	\$216.49
Invoice #INV354202	11/01/2022	\$0.00	\$202.13
Invoice #INV354202	11/01/2022	\$0.00	\$202.13
Invoice #INV354201	11/01/2022	\$0.00	\$202.13
Invoice #INV354203	11/01/2022	\$0.00	\$1,010.63
Invoice #INV380026	11/01/2022	\$0.00	\$216.48
Invoice #INV344528	12/01/2022	\$0.00	\$202.13
Invoice #INV379777	12/01/2022	\$0.00	\$216.48
Invoice #INV344527	12/01/2022	\$0.00	\$202.13
Invoice #INV344526	12/01/2022	\$0.00	\$216.49
Invoice #INV344529	12/01/2022	\$0.00	\$1,010.63
Invoice #INV334830	01/01/2023	\$0.00	\$202.13
Invoice #INV334837	01/01/2023	\$0.00	\$202.13
Invoice #INV378816	01/01/2023	\$0.00	\$216.48
Invoice #INV334839	01/01/2023	\$0.00	\$1,010.63
Invoice #INV334836	01/01/2023	\$0.00	\$216.49
Invoice #INV385558	02/14/2023	\$0.00	\$216.49
Invoice #INV385616	02/14/2023	\$0.00	\$1,010.63
Invoice #INV385617	02/14/2023	\$0.00	\$319.25
Invoice #INV385559	02/14/2023	\$0.00	\$216.49
Invoice #INV389058	02/18/2023	\$0.00	\$85.01

Payment Total: \$11,087.17

**Invoice #INV385616**

Invoice Date: 02/14/2023

Due date: 02/29/2023

Status: Paid in Full

Amount: \$1,010.63

PRODUCT (1)

SKU	Price per unit	Quantity	Amount
117	\$0.00	1	\$0.00

SKU: 117

This item is no longer available

Quantity: 1

Amount: \$1,010.63

BILLING

Terms: 28th of the Month

SUMMARY

Subtotal 1 Item	\$1,010.63
Tax Total	\$0.00
Shipping	\$0.00
Handling	\$0.00
TOTAL	\$1,010.63

ADJUSTMENTS

Payment #PYMT3442	(\$1,010.63)
Amount Due	\$0.00

DOWNLOAD AS PDF

4. Click an individual **Invoice Number** to open a detail screen showing the invoice status and summary.

COMING  
IN MAY  
2023

# PRINT A STATEMENT

Use Print A Statement to view and print a PDF copy of an invoice based on the date selected.

Select the invoice statement date

Next, Select: Consolidated Statement or another option

Last, Click Download as PDF to save or print a PDF copy of your records.

**The Pension Boards**  
United Church of Christ, Inc.

WHERE FAITH AND FINANCE INTERSECT

475 RIVERSIDE DR STE 1020  
NEW YORK NY 10115  
UNITED STATES

**Statement**

Date: 02/01/2023  
Amount Due: \$9,239.30  
Amount Encl.:  
Subsidiary: The Pension Boards U...

BILL TO  
ABC CONG CHURCH  
1212 MAIN STREET  
ANYWHERE, NY 11111

Date	Description	Charge	Payment	Balance	
09/01/2022	Invoice #INV372953	216.49		216.49	
09/01/2022	Invoice #INV372954	202.13		418.62	
09/01/2022	Invoice #INV372955	202.13		620.75	
09/01/2022	Invoice #INV382817	216.48		837.23	
09/01/2022	Invoice #INV372956	1,010.63		1,847.86	
10/01/2022	Invoice #INV363677	1,010.63		2,858.49	
10/01/2022	Invoice #INV381941	216.48		3,074.97	
10/01/2022	Invoice #INV363674	216.49		3,291.46	
10/01/2022	Invoice #INV363675	202.13		3,493.59	
10/01/2022	Invoice #INV363676	202.13		3,695.72	
11/01/2022	Invoice #INV354202	202.13		3,897.85	
11/01/2022	Invoice #INV354200	216.49		4,114.34	
11/01/2022	Invoice #INV354201	202.13		4,316.47	
11/01/2022	Invoice #INV380826	216.48		4,532.95	
11/01/2022	Invoice #INV354203	1,010.63		5,543.58	
12/01/2022	Invoice #INV344527	202.13		5,745.71	
12/01/2022	Invoice #INV344529	1,010.63		6,756.34	
12/01/2022	Invoice #INV344528	202.13		6,958.47	
12/01/2022	Invoice #INV344526	216.49		7,174.96	
12/01/2022	Invoice #INV379777	216.48		7,391.44	
01/01/2023	Invoice #INV334838	202.13		7,593.57	
01/01/2023	Invoice #INV334839	1,010.63		8,604.20	
01/01/2023	Invoice #INV334836	216.49		8,820.69	
01/01/2023	Invoice #INV378818	216.48		9,037.17	
01/01/2023	Invoice #INV334837	202.13		9,239.30	
Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Amount Due
0.00	1,847.86	1,847.86	1,847.86	3,695.72	\$9,239.30

# PAYMENT RULES

According to IRS Guidelines, Employee TSA and FSA Contributions should be submitted by the 15th of the following month that they were withheld from the employee's paycheck.

The Pension Boards always suggests that you pay your entire invoice by the due date, but if you are unable to pay the invoice in full, we suggest the following payment hierarchy:

- Medical Premiums
- Life Insurance Premiums
- Dental Premiums
- Employer Contributions
- Employee TSA/After-tax Contributions
- FSA Premiums

**PLEASE NOTE:** The entire amount for a specific benefit (Health, Dental, Employer Contribution) must be paid. Partial payment of an individual benefit is not currently permitted.

# PAYMENT SCHEDULES

Medical, Dental and Life Insurance Payments

Invoice Create Date	Invoice Month	Invoice Due Date
12-1	January	12-28
1-1	February	1-28
2-1	March	2-28
3-1	April	3-28
4-1	May	4-28
5-1	June	5-28
6-1	July	6-28
7-1	August	7-28
8-1	September	8-28
9-1	October	9-28
10-1	November	10-28
11-1	December	11-28

Employee Contributions

Invoice Create Date	Invoice Month	Invoice Due Date
1-1	January	1-28
2-1	February	2-28
3-1	March	3-28
4-1	April	4-28
5-1	May	5-28
6-1	June	6-28
7-1	July	7-28
8-1	August	8-28
9-1	September	9-28
10-1	October	10-28
11-1	November	11-28
12-1	December	12-28

## INVOICE NOTIFICATIONS

Type and purpose of notifications you may receive each month regarding your monthly invoice.

Type of Communication	Date Sent	Actions
Monthly Invoice available on the portal	1st of the month	Review invoice
Revised Invoice changes processed through the recordkeeping system during the current month*	Once changes are live on the portal	Review revised invoice
Payment not received, two months after the invoice is due *	5 business days after the first of the second month	Make a payment. Health Benefits will be terminated if payment is not received within 30 days.
Payment not received, month after the invoice is due*	5 business days after the first of the month	Make a payment. Health Benefits will be terminated if payment is not received within 60 days.
Payment not received by the end of the month due*	5 business prior to the end of the month	Make a payment. Health Benefits will be terminated if payment is not received within 90 days.

\* These notifications will begin starting May/June 2023

## OVERDUE BENEFITS POLICY

If benefits are not paid on time, they will be removed from the invoice once non-payment exceeds the designated timeline(s) in the chart below. Health Benefits will be terminated if the payment is not received within 90 days of the invoice date.

If a benefit has been terminated due to non-payment and reinstatement is needed, please contact our Customer Care team at 1.800.642.6543.

Benefit	Removed from Invoice Due to Non-Payment
Pension Contributions (Employer and Employee Contributions)	6 Months
Health Benefits (Medical, Dental, LIDI, FSA)	3 Months



## FREQUENTLY ASKED QUESTIONS

**I reviewed my invoice and noticed an incorrect amount. Can I correct it?**

Yes, contact our Member Services team at 1-800-642-6543 to discuss what form needs to be submitted to make the correction.

**I submitted the necessary paperwork to correct an invoice. When can I expect to see the correction?**

The review process generally takes five business days. After the paperwork is deemed to be in good order, the changes are processed. The corrected invoice will be available on the following business day.

**I am not able to submit payment for the full amount of the invoice. What can I do?**

Submit a partial payment. Check off the items that you can pay this month and then submit for payment. Our recommendation is to pay health benefits first, so that benefit coverage continues.

*Please note, the individual benefit line items can be paid in segments.*

**When should I pay TSA or FSA contributions?**

According to IRS Guidelines, Employee TSA and FSA Contributions should be submitted by the 15th of the following month that they were withheld from the employee's paycheck.

**I made a partial payment earlier in the month. Can I submit another payment?**

The Open Invoice will reflect the remaining payment amount required. Yes, multiple payments can be made on one invoice.

**My invoice reflects open invoices for multiple months. Do I need to pay all open invoices at once?**

No, but you must pay the oldest outstanding invoice first. Paying all open invoices is recommended, but not mandatory.

**Can I set up autopay for monthly recurring payments?**

Not at this time. Autopay is not currently a feature, but you can save your payment information securely and save time having to re-enter your information when paying with a credit card.

## FREQUENTLY ASKED QUESTIONS

### **Why does my invoice reflect overdue amounts when I made a payment?**

If you did not pay by the 28th of the month, the invoice will reflect an overdue amount. Additionally, if the entire invoice was not paid, the portion that was not paid will reflect as overdue.

### **Will I receive payment confirmation emails?**

Yes, confirmation emails are sent after payments are submitted. Confirmations will be delivered to the email address on file.

### **How can I prevent a lapse in benefit coverage due to non-payment?**

Non-payment of health benefits for 90 days may cause a lapse in coverage. Therefore, it is recommended to prioritize health benefit payment dues.

### **Will I receive helpful reminders when payments are overdue, and when?**

Yes, reminder e-mail notifications are sent when invoices are past due over 30, 60 or 90 days.

### **How can I review and update my Credit Card information on file?**

Select 'Settings' then 'Credit Cards'. From this screen enter the preferred Credit Card information and click 'Add Card.'

# EMPLOYER PORTAL GUIDE

NETSUITE PORTAL UPDATE APRIL 2023



**The Pension Boards**  
United Church of Christ, Inc.