Q1: What is the employer portal?
A1: The employer portal is a site that serves as your central “hub” for benefit administration.

Q2: My ministry is new to the employer portal. How do I get started?
A2: If your ministry does not have any portal administrators designated, please contact CPS at 888-927-7526 or send the administrator’s name, phone number and email address to info@ConcordiaPlans.org to get started.

Q3: How do I access the portal?
A3: The portal is accessed through ConcordiaPlans.org using “My Account” button in the top right corner. If you have been designated as Portal Administrator for your ministry, click on the “My Account” button to access the portal and see Q6 about how to register. If you have already registered, enter your email address and password and then click “Sign In.” If you are just getting started or are unsure whether you are an Administrator, contact CPS using the information in Q2.
Q4: I am my ministry’s Portal Administrator. How do I designate additional portal administrator roles?
A4: Follow these steps to designate your Portal Administrators.

2. If you have previously logged in to the Benefits Portal Administrator Designation tool, enter your CPS Employer ID and password. If you have not or would like assistance, please contact us at 888-927-7526 or info@ConcordiaPlans.org.
3. Once you have successfully logged in, you will be asked if you are a member of the Concordia Plans.
   • If you answer “Yes,” you will be prompted to choose your name from the list of workers and click “Select.” You will then be required to enter a valid email address. Click “Designate your admins” once you’ve entered this information.
   • If you answer “No,” you will be prompted to enter your name, date of birth, Social Security Number, position status (such as volunteer) and email address. Click “Designate your admins” to proceed.
4. Follow the on-screen prompts to make selections for Financial Administrators, HR Administrators and HR Read-Only Administrators.
   • Click the green “Select” button next to a member’s name to assign a Portal role.
   • If the person you’d like to assign is not listed, click the green button that says “Add Volunteer or Part-Time Worker.”
   • If you don’t need to assign a person to a particular role, click the green “Next Step” button to skip to the next screen.
   • After navigating through all the screens, click the green “Complete Process” button.

Q5: Which type of Portal Administrator role should I choose?
A5: Choose a Portal Administrator role based on the type of transactions your Administrator will perform. Your ministry may assign only one Plan Administrator and an unlimited number of Financial, HR and HR Read-Only Administrators.

• Plan Administrator:
  o Elect benefit plan options during annual Employer Election Period
  o Assign portal administration roles to others
  o Add and update worker accounts
  o Report worker salaries
  o Enroll workers
  o Make benefits elections and changes for workers
  o Review CPS invoices
  o Make payments to CPS
• Financial Administrator:
  o Review CPS invoices
  o Make payments to CPS
• HR Administrator:
  o Add and update worker accounts
  o Report worker salaries
  o Enroll workers
  o Make benefits elections and changes for workers
• HR Read-Only Administrator:
  o View worker records
  o View employer benefits settings
Q6: I’ve designated my ministry’s Portal Administrator, so what’s the next step?

A6: On the business day after you are designated as a Portal Administrator, you can access your employer portal account.

If you are already registered in the portal as a member, sign in by clicking “My Account.” Enter the email address and password associated with your member portal account. To access your employer account, move your cursor to the top right of the screen where you see your name. Click on the down arrow. From here you can toggle between your account as an employer and your account as a member. You may skip steps 1-5 below.

If you are not registered in portal as a member, click the “My Account” button on ConcordiaPlans.org. Click on “Register” and follow these steps.

1. Enter your email address. This is where you enter the email address you want associated with your profile. While you may have received the invitation to register at your work email address, you have the option of setting you your account using the email address of your choice. If you are an employer administrator, you will likely want to continue using your work email address.
2. **Create your password.** You will need to create a password using a minimum of eight characters that includes an upper case and lower-case letter, as well as a numeric character. For convenience, you can check the box to show your password so you can see what you are typing. As an employer administrator, you will be prompted to update this password every six months for security purposes.

3. **Choose and answer a security question.** There is a large list of questions from which you can choose. Once you have found one you like and for which you will remember your answer, type in your answer.

4. **Verify your account.** This step is important because it will allow you access to your employees’ benefits information, as well as your own. Enter your:
   - Last name.
   - The last four digits of your Social Security Number (SSN).
   - Date of birth.
Providing this information ensures that you are uniquely matched up with a valid administrator record so that your account is secure and your information is accurate. This information enables the portal to be personalized for you and your ministry. Click the submit button and you should see a “Success!” message if your account is ready to go.

5. **Sign in.** Click on the “Sign in to my Dashboard” button and in the sign-in section on the left, enter the email address and password you used when you registered your account. To make future sign-ins easier, you can click the box for “Remember me,” which will save your email address for next time and require you to type in only your password.

Once you have completed this final step, you will be directed to your ministry’s employer portal dashboard. **Please note:** You will be able to access the Benefits Administration System 48 hours after you have registered for the employer portal.
Q7: I understand this is a portal for employers and members. I’m both, so is there an easy way to access both accounts?
A7: Yes. Move your cursor to the top right of the screen where you see your name. Click on the down arrow. From here you can toggle between your account as an employer and your account as a member. There is no signing out of one to get back to the other.
Q8: What can I do on the employer portal dashboard?

A8: The dashboard is your toolbar and your home base. The toolbar is the row of tabs that take you to some of the most requested content on the portal - Quick Links, Workers, Benefits, Billing, Actions, Resources and Admin Profile. If you need additional help, click the “Help” button, located to the right of the toolbar. From the dashboard, you can:

• Pay your bill electronically through the Concordia Plans Online Payment System by simply clicking the “Pay Online” button, which you will find under both the “Admin Profile” and the “Resources” tabs.
• Access your ministry’s Account Manager by emailing or calling him or her.
• Monitor how many workers have enrolled in each plan your ministry offers.
• See which benefits your ministry is currently enrolled.
• Receive alerts as to what actions your ministry needs to take or important information you need to read, along with deadlines for completing those actions.
• Tap into resources that will help you administer benefits and stay up to date on the important information that applies to your ministry and your workers.
Q9: Where can I see who has been named to specific portal administrative roles for my ministry?
A9: Click on the “Admin Profile” tab on the toolbar. On the right side of the “Admin Profile” screen, you can see specific administrative roles within your employer portal. These roles include Plan Administrator, Financial Administrator, HR Administrator or HR Read-Only Administrator.

Q10: What do I do if I want to reassign an administrative role?
A10: To make changes to your portal administrator designations, click this link and follow the on-screen prompts. If you need assistance with your updates, contact CPS at 888-927-7526 or info@ConcordiaPlans.org.

Q11: What worker information will I be able to access?
A11: Under the “Workers” tab, you will find a list of your workers and the benefit plans they are enrolled in. Type a worker’s name in the search bar to find a specific worker. Directly below the search feature is a list of boxes you can check to filter your workers by specific benefit plans. For example, you can see all workers participating in the Concordia Retirement Savings Plan.

If you would like to manage your workers’ benefits, please log into the Benefits Administration System. You will find this link under Quick Links.

Q12: What is the Benefits Administration System?
A12: The Benefits Administration System (BAS) is a site accessed through your employer portal. The BAS is used to enroll new workers, make changes to worker elections and view reports regarding worker benefit elections and payroll deductions.
Q13: When can I begin entering benefits in the Benefits Administration System?
A13: Your access to the Benefits Administration System will be finalized approximately 48 hours after you have registered for the employer portal.

Day 1: Assign Portal Administrators.
Day 2: Create an account on the employer portal at ConcordiaPlans.org > My Account.
Day 3: Registration data is submitted to the Benefits Administration System.
Day 4: Registration is complete! You may now begin administering benefits in the Benefits Administration System.

Q14: How will I know when I have actions to take?
A14: When you sign in, look for an orange circle at the top right of the “Actions” tab. If you see that circle and a number inside the circle you have that number of alerts requiring action, along with completion deadlines. You can also conveniently add these actions to your personal calendar so that you are reminded.
Q15: Why do you need Social Security numbers for the portal administrator and others handling administration on the portal?
A15: We require Social Security numbers of the individuals you have identified because an administrator on the portal, even one with read-only privileges, will be able to view sensitive data about the workers at your ministry. To protect your workers’ privacy, we must validate each user in this way.

One way of protecting your information is making sure that you have identified the person or people allowed to select plans, administer benefits and view/pay invoices from CPS. We need these details to help us be good stewards of the information you entrust to us.

Q16: What is CPS doing to protect personal information on the portal?
A16: We take security very seriously at Concordia Plans. All efforts are made to protect the large amount of employer and member data we house. We have a multi-layer environment of how data is stored and protected at-rest with encryption, who has access, connections to servers, transfer of data along with security monitoring.

The employer administration part of the portal resides in a hardened and secured facility. Access to the website is secured through industry best practices encryption and other security software.

Additionally, security is set up internally to assign roles and permissions to critical servers, folders, and files. This is monitored and audited frequently. We partner with a specialized security vendor that monitors our systems for any inbound or outbound malicious or suspicious activity. There are also technologies on the perimeter of our network to detect and alert our internal and external security teams in the event of an issue.

Finally, we’ve implemented solutions to monitor and alert key IT personal when Protected Health Information, personally identifiable information, or Social Security numbers being sent unsecured. The solution will block those messages and provide a report back to key IT personnel.

If you have questions, please contact us at 888-927-7526, and we will be happy to help.