



Employer Portal – Administrative User Guide

Security Role: **Invoice Administrator**

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Basic Navigation

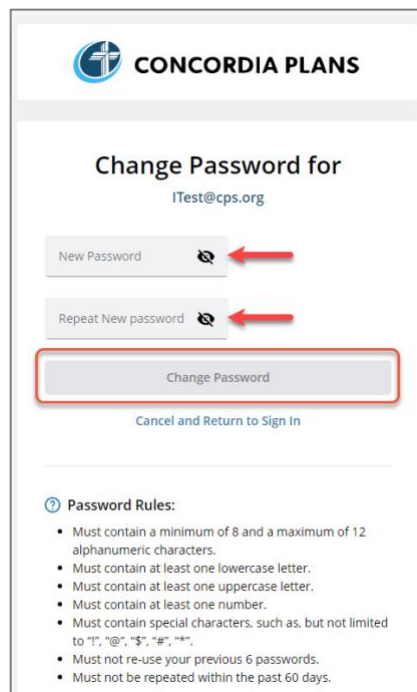
Logging In

Concordia Plans must set up all Plan Administrators for access to the Employer Portal. Contact CPS at 888-927-7526 or info@concordiaplans.org to request portal access for your ministry. On your first log in, you will need to reset your password. Follow the steps below to reset your password and log into the Employer Portal.


1. Go to www.ConcordiaPlans.org/EmployerPortal to access the login page.
 - Enter your:
 - **Employer Email:** Email address you used to register for the Employer Portal.
 - **Password:** Temporary password provided by CPS.
 - Click **Log In**.




2. Enter a new password of your choice following the password rules listed on the screen, then click **Change Password**.



Change Password for
ITest@cps.org

New Password 

Repeat New password 

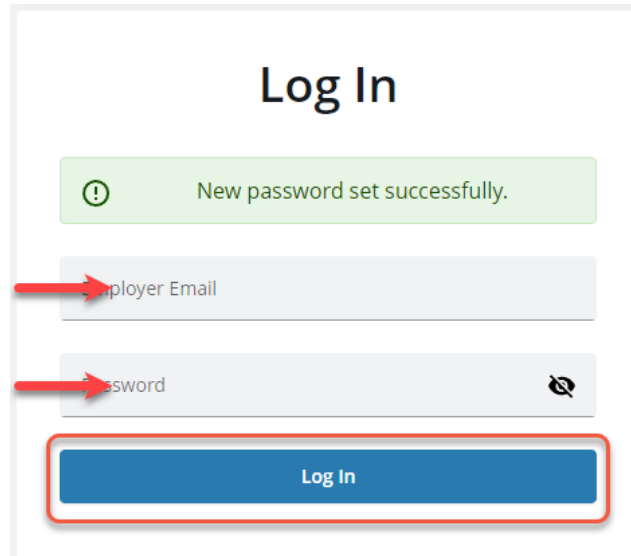
Change Password

[Cancel and Return to Sign In](#)

Password Rules:

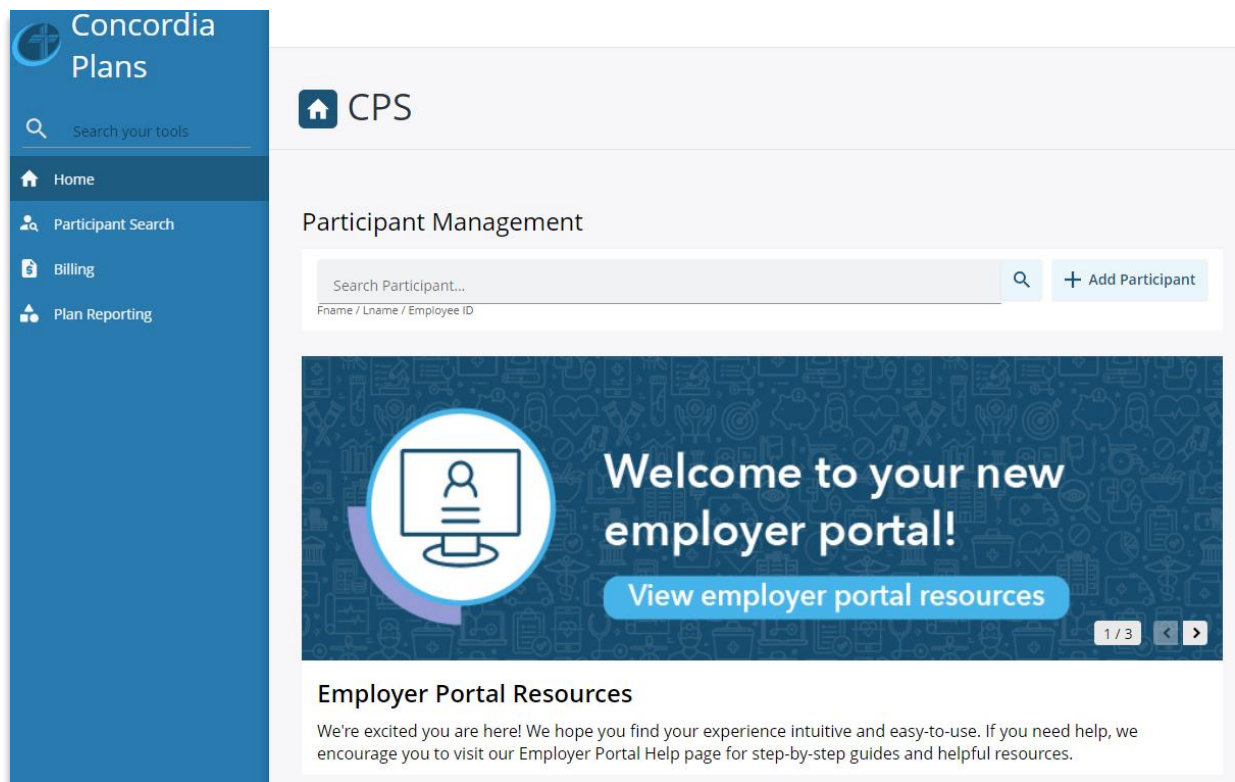
- Must contain a minimum of 8 and a maximum of 12 alphanumeric characters.
- Must contain at least one lowercase letter.
- Must contain at least one uppercase letter.
- Must contain at least one number.
- Must contain special characters, such as, but not limited to "!", "@", "\$", "#", "*".
- Must not re-use your previous 6 passwords.
- Must not be repeated within the past 60 days.

3. A green confirmation will alert you that your password has been set. You can now log into the site by entering your email address, your new password and clicking **Log In**.



The image shows a 'Log In' screen. At the top, the text 'Log In' is centered. Below it is a green notification box with an exclamation mark icon and the text 'New password set successfully.' Underneath the notification are two input fields: 'Employer Email' and 'Password'. Red arrows point to each of these fields. Below the input fields is a blue 'Log In' button, which is highlighted with a red rectangular border.

4. The Employer Portal Home screen displays. You can now use the Employer Portal.

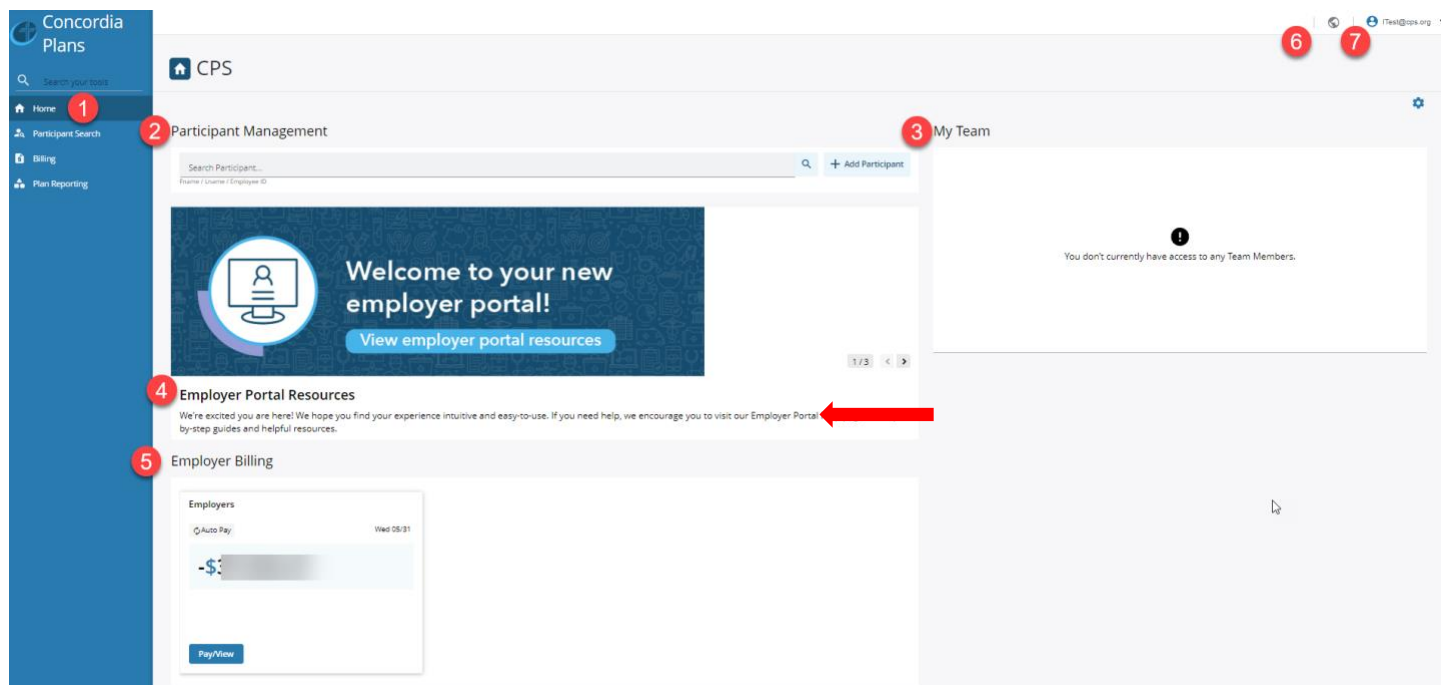


Forgotten Password Recovery

- Contact CPS at 888-927-7526 or info@concordiaplans.org to reset your password.
- CPS will provide you with a temporary password. Follow the [Logging In](#) instructions to reset your password.

Home

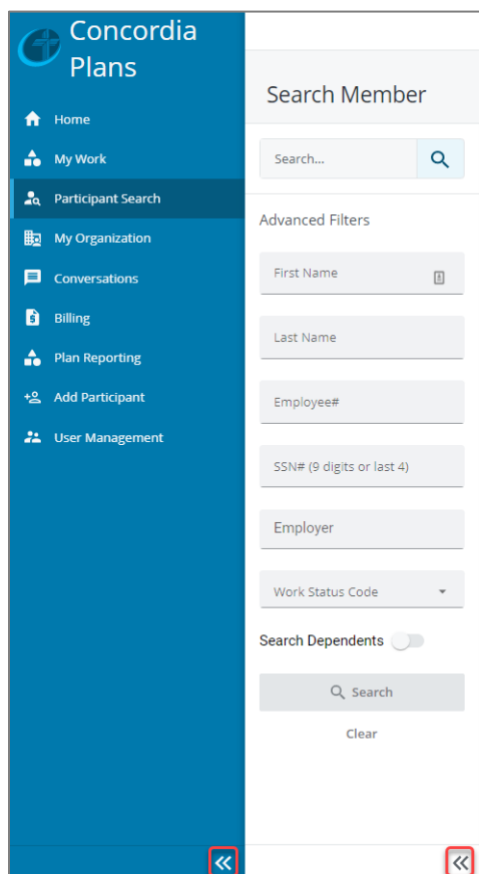
The options a user can see on the Home screen vary based on the administrator's access level. As an **Invoice Administrator**, you will see the options displayed below.



1. **Left Navigation Menu:** Links to different places within the Employer Portal. The options you see in the left navigation menu vary based on an administrator's user access level. As an **Invoice Administrator** you will see the options listed below.

Some options, such as **Participant Search**, will display a white sub-menu to the right. Use the << icons to collapse the menus. Once collapsed, you can also use the >> to expand and view the menus.

Collapse:



Expand (found in bottom left corner):



The Home screen also contains multiple small sections, referred to as *cards*. These cards provide immediate access to many of the functions contained in the left navigation menu. The cards listed on the home screen are:

- 2. Participant Management:** Search for members by name (First or Last) Social Security number or CPS member ID.
- 3. My Team:** This is where an admin would view users (ie, portal admins) in your organization with access to the Employer Portal. The Invoice Admin cannot access this information, therefore you will see a message stating that you cannot see Team Members. Contact CPS if you have questions about your organization's portal users.
- 4. Employer Portal Carousel:** Access helpful resources for the Employer Portal and benefits administration. The content in the carousel is subject to change and highlights timely information and resources. Use the < and > icons to scroll through the available pages and click anywhere in that carousel image to access that page.
- 5. Employer Billing:** View a quick summary of your balance due and submit electronic payments. Additional details regarding [Employer Billing](#) are included in a later section.

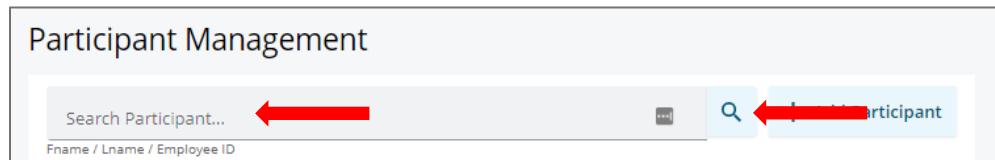
In the upper right corner of the home screen, you will find additional functions within the Employer Portal.

- 6. Globe Icon:** Click the icon to access the Concordia Plans website.
- 7. User Name and Account Menu:** Click your user name to access a drop-down menu of account options, such as sign out, change your password and view your login history.

Participant Search

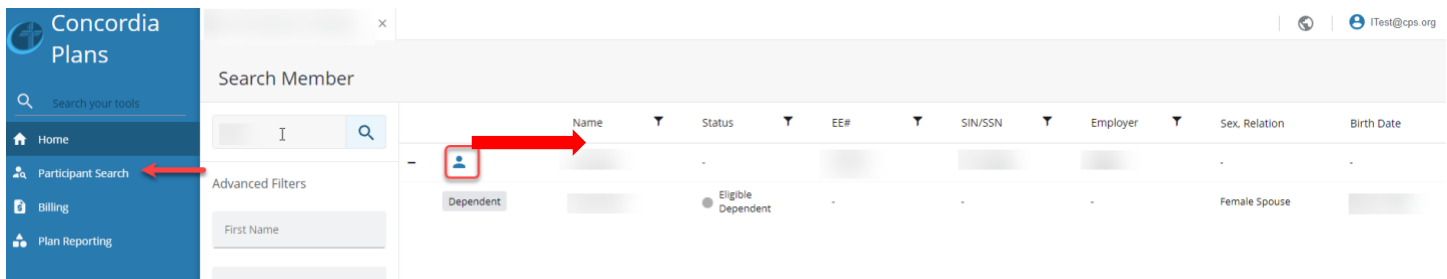
In the Employer Portal, members are referred to as Participants.

To view workers at your ministry, use the **Participant Search** function.



The image shows a 'Participant Management' search interface. It features a text input field labeled 'Search Participant...' with a red arrow pointing to it. To the right of the input field is a magnifying glass icon, also with a red arrow pointing to it. Below the input field, there is a small text label 'Fname / Lname / Employee ID'.

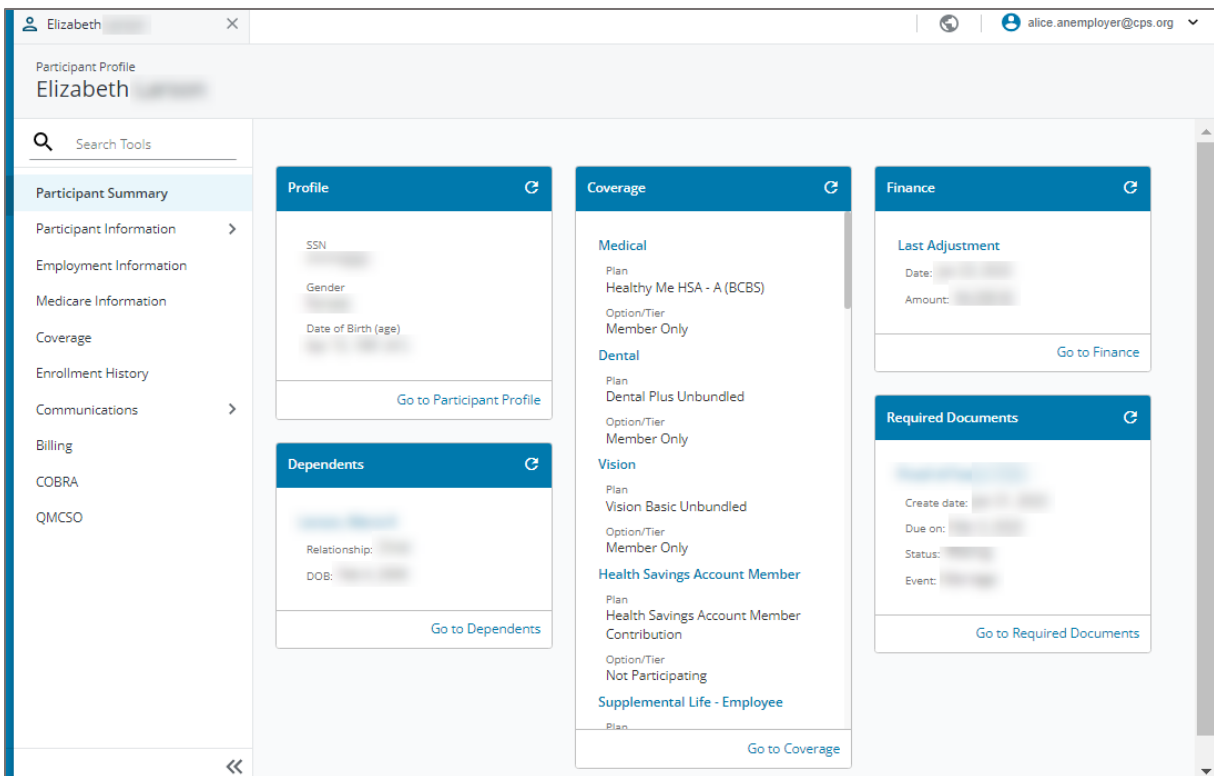
1. Type a member's name (first, last or both), Social Security number or CPS Member ID number into the **Search Participant** field.
2. Click the **magnifying glass** icon or press the Enter key to begin your search.
The Search Member screen displays, with the member record available for selection.



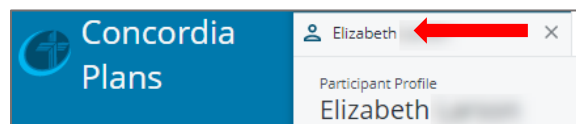
The image shows the 'Concordia Plans' interface. On the left is a sidebar with a search bar and navigation links: Home, Participant Search (highlighted with a red arrow), Billing, and Plan Reporting. The main area is titled 'Search Member' and contains a search input field with a magnifying glass icon. Below the search field are 'Advanced Filters' for 'First Name' and 'Last Name'. A table displays search results with columns: Name, Status, EE#, SIN/SSN, Employer, Sex, Relation, and Birth Date. The first row shows a member with a person icon (highlighted with a red arrow) in the Name column. Below the table, there are checkboxes for 'Dependent' and 'Eligible Dependent', and a 'Female Spouse' checkbox.

Members and dependents who match the search criteria will be displayed. Members are indicated with a person icon.

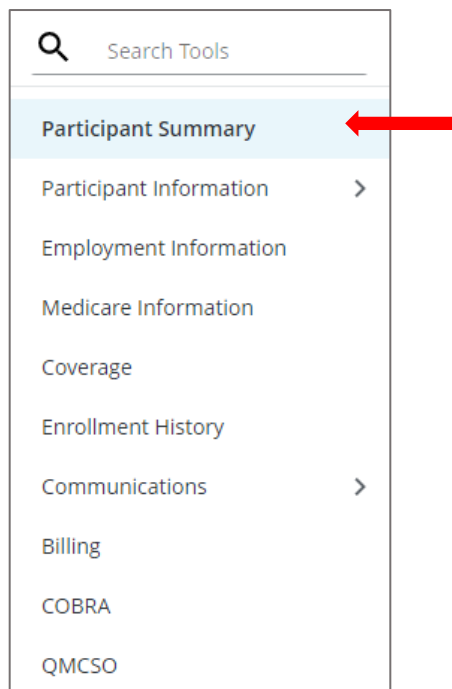
3. To access the member's data, click the person icon to the left of the member's name.
The member's Participant Profile screen displays.



Note that the name of the selected member appears in a tab at the top of the screen.

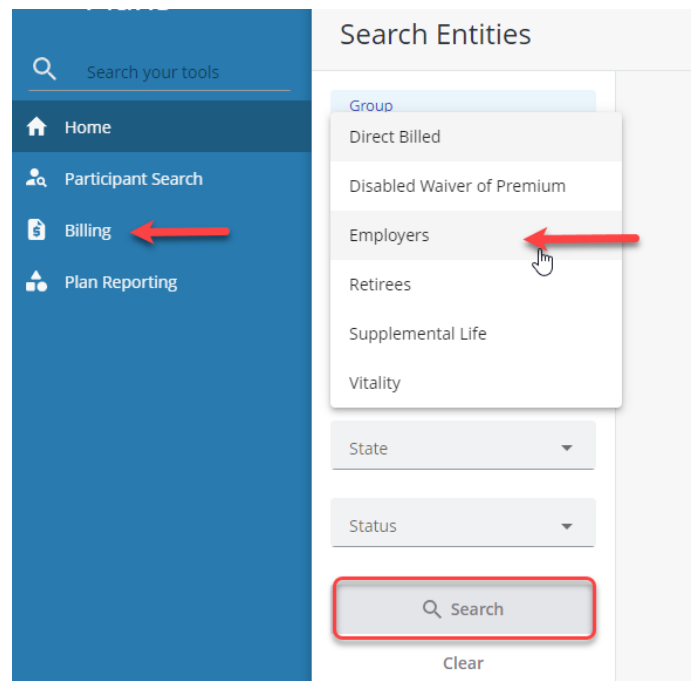


This screen is called the **Participant Summary** and the command is highlighted on a new white menu that displays. This menu may be called the **participant** (or member) **menu**. Note that the Participant Search in the blue menu (left navigation menu) takes you to the same place as the Participant Search on the home screen. Either of these methods is correct.




Billing

The billing section is used to view and pay monthly invoices, as well as to administer billing preferences, such as invoice delivery and auto-pay settings. This can be accessed from the Employer Billing card on your portal Home screen, or by clicking Billing in the blue left navigation panel.



To access your invoices from the **Billing** menu (versus the Employer Billing card on the Home screen).

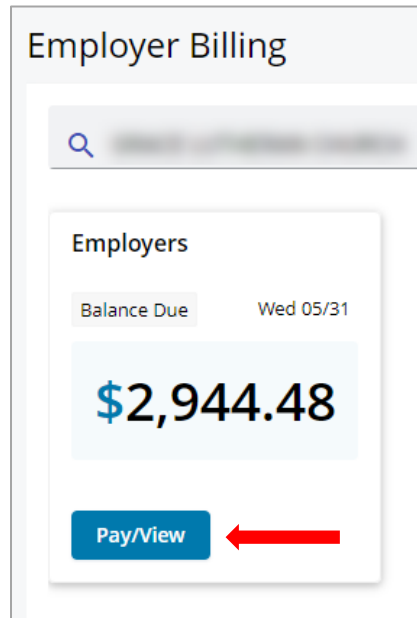
- 1. Under Search Entities, select **Employers** in the Group field.
- 2. Click **Search**. A list of your invoices will appear. Click the invoice icon to access the Billing Home screen (additional details provided in Billing Home Screen section(s) below).

	Entity	Name	Group	Location	Last Date Invoiced	Balance	Status
			Employers		Apr 30, 2023		Active

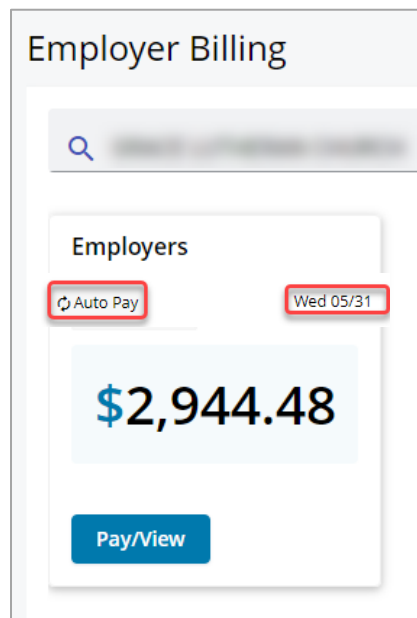
Billing Home Screen

The Billing Home Screen can be accessed by using the **Billing** option on the left navigation menu (illustrated in the previous section) or by clicking the **Employer Billing** card on the Employer Portal Home screen.

The Employer Billing card on your Employer Portal home screen displays your balance due and the due date.



If your ministry is enrolled in Auto-Pay, you will see the balance due with an Auto-Pay indicator and the due date of the invoice. (Note: This does not indicate your ACH deduction date. You can select a specific date for payment deduction on a different screen.)



Click the **Pay/View** button.

The Billing Details screen displays, with **Home** selected on the organization navigation menu.

Billing Details

Search Tools

Home

Transactions

Invoicing

Payments

Credits

Adjustments

ACH

Payment Plans

Forms

Group Employers City

Name Net Due ⓘ

Latest Activity

	Date	Amount
Last Invoice	05/01/2023	
Last Payment	03/20/2023	
Last Credit	03/08/2023	
Last Adjustment	03/07/2023	

Invoice Preferences

Exclude From Invoicing

Receive Statement

Statement Display Salary

Statement Employee Grouping

Statement Sort

Messages

There are unallocated payments on file.

Currently Billed Participants

Number of Participants 13

[View List](#)

Additional Information

Group Entity Status	Active
Status Change Date	03/20/2023
Paid Through Date	05/31/2023

Click the **blue icon** to view a snapshot of the invoice balance details. Click it again to close the details window.

Group Employers City

Name Net Due ⓘ

Balance

Balance as of 05/01/2023

Invoice run on 03/08/2023

Beginning Balance	
Invoiced Amounts	
Adjustments	

Latest Activity

Last Invoice	
Last Payment	
Last Credit	
Last Adjustment	

Amount

Latest Activity

The Home screen displays the **Latest Activity** section, which may include invoices, payments, credits, and other transactions.

Each transaction contains a link to its specific details in the **Date** column.

Latest Activity	Date	Amount
Last Invoice	05/01/2023	\$745.25

1. Click the date link to basic information about the invoice.
The **Search Results** section opens below.

Search Results										
Id	Invoice Date	Invoice Type	Period Begin Date	Status	Prior Balance	Invoiced Amts/Adjustments	Allocated Pmts/Credits	Unallocated Pmts/Credits	Amount Due	
22751	05/01/2023	Scheduled	05/01/2023 - 05/31/2023	Processed					\$2,944.48	

The Search Results displays the Invoice Date, Invoice Type, Status, Prior Balance, Invoiced Amounts/Adjustments, Allocated Pmts/Credits, Unallocated Pmts/Credits, and Amount Due columns.

Note the **ID** column which contains a link.

2. Click the link in the **ID** column to show a list of transactions included in that particular invoice.
The **Invoice Details** section opens below, which contains all the transactions of the invoice.

Invoice Details																					
Invoice Date		05/01/2023				Status		Processed													
Type		Scheduled				Invoice ID		22751													
Period Begin Date		05/01/2023 - 05/31/2023																			
Run by on 03/08/2023 using billingInvoicesEmployers																					
Invoice Transactions																					
View/Group By		Employee (Last, First) or Person ID																			
						Search		Refresh													
Transaction Type		Billing Item																			
ID	Transaction Date	Transaction Type	Item	Coverage	Billing Period	Person ID	Name	Amount													
2777712	03/08/2023	Invoice	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis	05/01/2023-05/31/2023			\$580.51													
2777709	03/08/2023	Invoice	Disability	Disability / Disability Benefit / 70% of Annual Compensation	05/01/2023-05/31/2023			\$150.13													

Each transaction contains a link as well in its **ID** column.




ID	Transaction Date	Transaction Type	Item	Coverage
2777712	03/08/2023	Invoice	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis

- Click the link in the **ID** column to view additional details about a specific transaction.
The Transaction Details window opens.

Transaction Details For 2777712 ×

Invoice Details

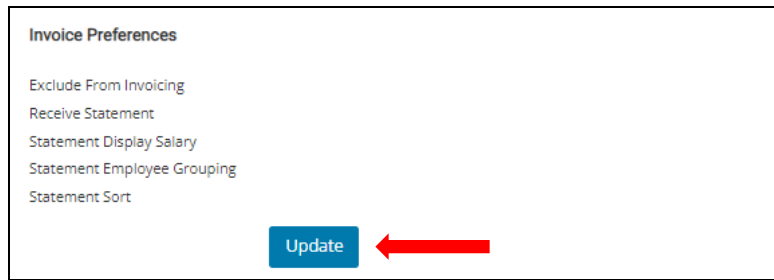
Invoice Date	05/01/2023
Type	Scheduled
Invoice Status	Processed
Invoice ID	22751
Run By	
Run Date	03/08/2023

 Close

- Click the **Close** button when finished viewing the Transaction Details.

Invoice Preferences

The Billing Home screen also contains an Invoice Preferences section, which allows for setting the display attributes of the invoices.



Invoice Preferences

Exclude From Invoicing

Receive Statement

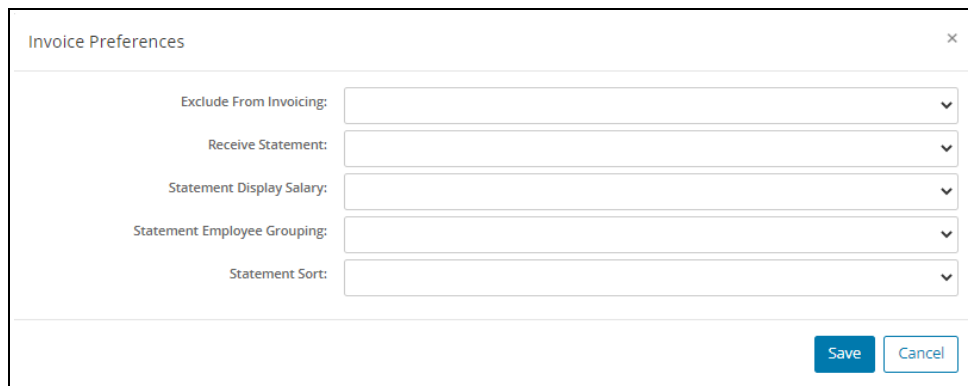
Statement Display Salary

Statement Employee Grouping

Statement Sort

Update

1. Click the **Update** button.
The Invoice Preferences window opens.



Invoice Preferences

Exclude From Invoicing:

Receive Statement:

Statement Display Salary:

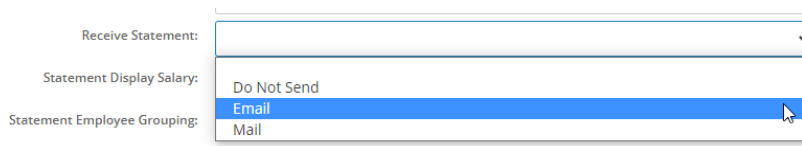
Statement Employee Grouping:

Statement Sort:

Save Cancel

2. Click the drop-down arrows in each of the preference fields, and make the appropriate selections for your organization.

Choose from **Mail** or **Email**. Selecting Do Not Send will generate an error message and your changes will not be saved.



Receive Statement:

Statement Display Salary:

Statement Employee Grouping:

Do Not Send

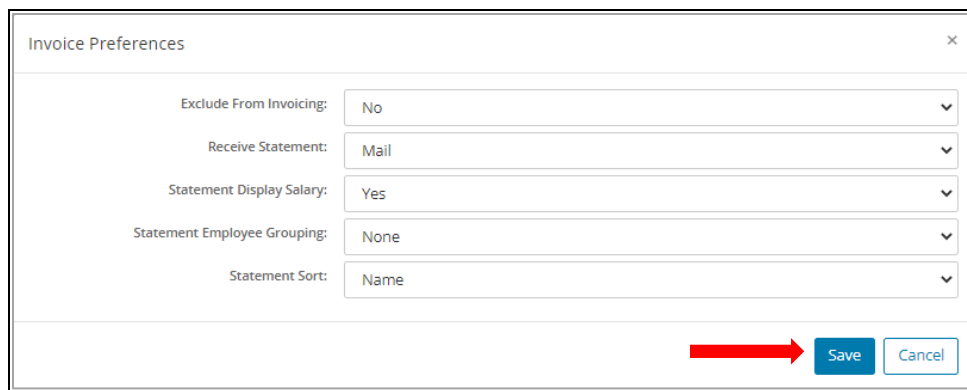
Email

Mail

Note: The default Invoice Preference will be Mail.

- If **Mail** is selected, your invoice will be mailed to you on/around the 4th business day of the month. Your invoice will include a **Member Cost** report, which displays changes to benefits that might result in a change to worker payroll deduction.
- If **Email** is selected, you will receive an email notification at your portal-registered email address indicating an invoice is ready for you to view in the Employer Portal. Your invoice will no longer be mailed.
 - The Member Cost report will not be included on your digital invoice.
 - To view the **Member Cost** report, use the Plan Reporting section to run a Member Cost report.
 - Additional instructions are included in the **Plan Reporting > Custom Reports > Member Cost File** section of the training guide.

- When finished, click the **Save** button.



Invoice Preferences

Exclude From Invoicing: No

Receive Statement: Mail

Statement Display Salary: Yes

Statement Employee Grouping: None

Statement Sort: Name

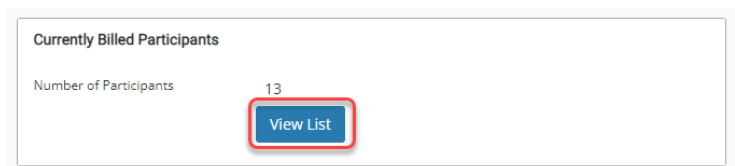
Save Cancel

The updated preferences display in the Invoice Preferences section of the Billing Home screen.

Currently Billed Participants

The Currently Billed Participants card provides a quick view of the number of participants (members) on your current invoice.

- Click the **View List** button to view a list of your currently billed members.

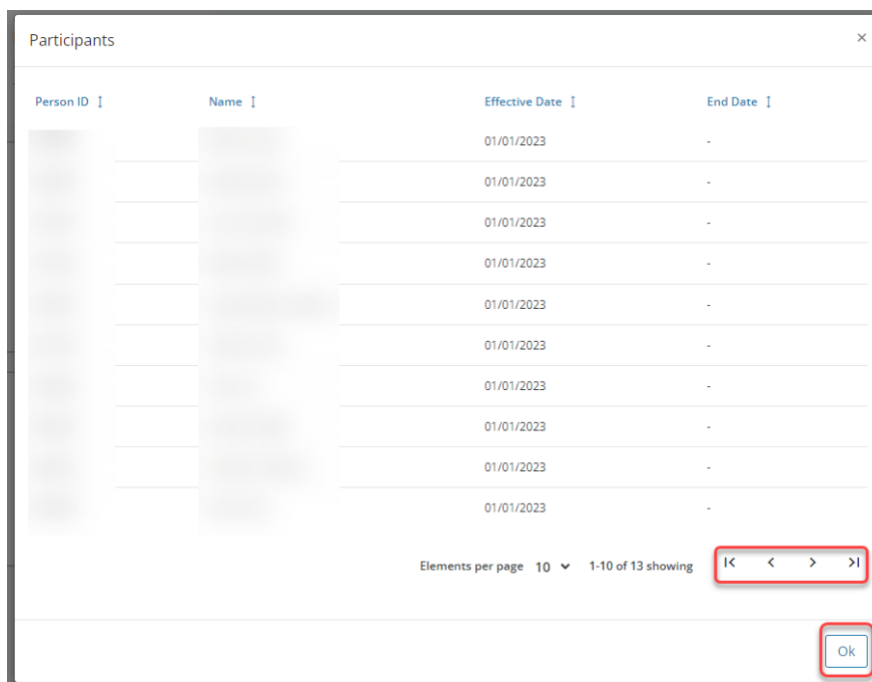


Currently Billed Participants

Number of Participants 13

View List

- A new window opens that displays the Person ID (member ID), Name, Effective Date and End Date (if applicable). Use the arrows to navigate through the list and click **OK** when you're finished viewing.



Participants

Person ID	Name	Effective Date	End Date
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-
		01/01/2023	-

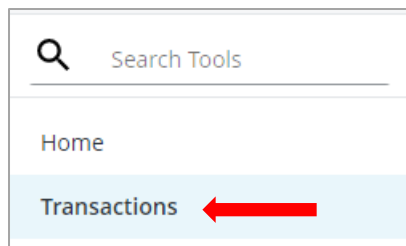
Elements per page 10 1-10 of 13 showing

Ok

Transactions

The Transactions screen shows individual transactions related to an invoice. You can also download a list of transactions to Excel from this screen.

1. Click **Transactions** on the navigation menu to see the activity details for invoicing.



2. A list of transactions will display.

Search Results								
ID ↓	Date ↓	Transaction Type ↓	Item ↓	Coverage ↓	Billing Period ↓	Person ID ↓	Name ↓	Amount ↓
2405118	02/23/2023	Invoice	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis	02/01/2023 - 02/28/2023			
2405117	02/23/2023	Invoice	Disability	Disability / Disability Benefit / 70% of Annual Compensation	02/01/2023 - 02/28/2023			
2405116	02/23/2023	Invoice	Medical	Medical Premium Plus / Premium Plus (WebTPA) - Bundled / Member Only	02/01/2023 - 02/28/2023			
2405115	02/23/2023	Invoice	Supplemental Employee Life	Supplemental Life - Employee / Supplemental Life - Employee / \$50,000	02/01/2023 - 02/28/2023			

3. You can refine your results by using the Find Transactions section to filter by date or other criteria. Use the dropdowns to view the filter options.

Find Transactions

Date Options

Date Filter

Billing Period Date Range

From

01/31/2023

To

05/01/2023

Additional Search Options

View/Group By

Employee (Last, First) or Person ID

Search

Refresh

Billing Item

Transaction Type

Downloading to Excel

The subsequent screens give you the option to download your results to Excel. This function is available anytime you see the gear icon in the upper right corner of search results screen.

Search Results									
ID ↓	Date ↓	Transaction Type ↓	Item ↓	Coverage ↓	Billing Period ↓	Person ID ↓	Name ↓	Amount ↓	
3255493	03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis	06/01/2023 - 06/30/2023				

1. Click the gear icon, then click **Download Results To Excel**.

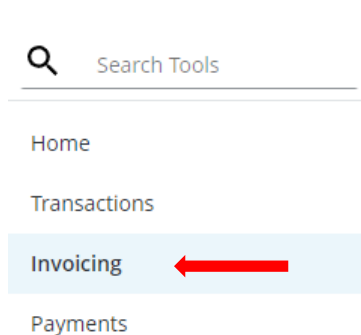
Search Results									
ID ↓	Date ↓	Transaction Type ↓	Item ↓	Coverage ↓	Billing Period ↓	Person ID ↓	Name ↓	Amount ↓	

2. Open the Excel document to view the downloaded results. From here, you may save, edit or print the Excel file according to your ministry's needs.

GROUP	ENTITY	TRANSACTION	TRANSACTION	TRANSACTION	ITEM	COVERAGE	BILLING PERIOD	PERSON ID	NAME	TRANSACTION
2	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			369.75
3	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			290
4	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			290
5	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			297.25
6	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			471.25
7	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			362.5
8	employers		03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			282.75

Invoicing

This selection is another method to view a listing of your invoices.



1. Click **Invoicing** on the navigation menu.
2. A list of invoices will display. Use the **Invoice Date** section to search for invoice from a particular date range.

Billing Details

Search Tools

Home

Transactions

Invoicing

Payments

Credits

Adjustments

ACH

Payment Plans

Forms

Group: Employers City: BRONX, New York

Name: Net Due:

View Existing Invoices

Find Invoices

Invoice Date

From: 02/01/2023 To: 05/01/2023

Additional Search Options

Invoice Type

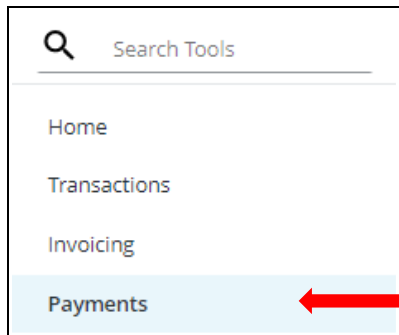
Search Results

Id	Invoice Date	Invoice Type	Period Begin Date	Status	Prior Balance	Invoiced Amts/Adjustments	Allocated Pmts/Credits	Unallocated Pmts/Credits	Amount Due
23174	05/01/2023	Scheduled	05/01/2023 - 05/31/2023	Processed			\$0.00	\$0.00	
19089	04/01/2023	Scheduled	04/01/2023 - 04/30/2023	Processed			\$0.00	\$0.00	

3. Click on any invoice ID, then follow the follow the directions in the **Latest Activity** section of this guide to navigate the subsequent screens.

Payments

The Payments screen shows a list of payments submitted by your organization.



1. Click **Payments** on the navigation menu.
The Payments screen displays.

A screenshot of the Payments screen. At the top, there's a header section with 'Group Employers', 'City', 'Name', and 'Net Due -\$2,368.90'. Below this is a 'Find a Payment' bar. The main section is titled 'Find Payments' and contains search filters. On the left, 'Date Posted' has a 'Date Filter' dropdown set to 'Custom Date Range'. Below it, 'From' and 'To' date pickers are shown with dates 01/05/2023 and 04/05/2023 respectively, along with search and refresh buttons. On the right, 'Additional Search Options' includes 'Source' and 'Status' dropdowns. Below the filters is a 'Search Results' section with a table of payment data. The table has columns for Payment ID, Date Posted, Date Received, Source, Status, Amount Received, Amount Allocated, and Amount Refunded. The first row is highlighted in blue.


Payment ID ↓	Date Posted ↑	Date Received ↑	Source ↑	Status ↑	Amount Received ↑	Amount Allocated ↑	Amount Refunded ↑
20479	03/20/2023	03/20/2023	Recurring ACH	Partially Allocated	\$6,723.62	\$4,354.72	\$0.00
20462	03/20/2023	03/20/2023	One-Time ACH	Allocated	\$1,000.00	\$1,000.00	\$0.00
446	01/23/2023	12/28/2022	Lockbox	Allocated	\$1,329.03	\$1,329.03	\$0.00
445	01/23/2023	11/30/2022	Lockbox	Allocated	\$1,263.38	\$1,263.38	\$0.00

The Payments screen contains a table with recent activity in the Search Results section. Each transaction contains a link to its details in the **Payment ID** column.

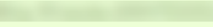


2. Click the link in the **Payment ID** column.

The Payment Details, Payment Assignments, and Payment Allocations sections display.

Payment Details

Date Posted	03/20/2023	Status	Partially Allocated
Date Received	03/20/2023	Source	Recurring ACH
Reference Number	38	Payment ID	20479
Amount Received	\$6,723.62	Amount Assigned	\$0.00
Amount Allocated	\$4,354.72	Assigned Allocated	\$0.00
Total Remaining	\$2,368.90	Date Allocated	03/29/2023

Created by  using achDebitExport

Payment Assignments

There are no assignments for this payment.









Payment Allocations

Item

Employee (Last, First) or Person ID

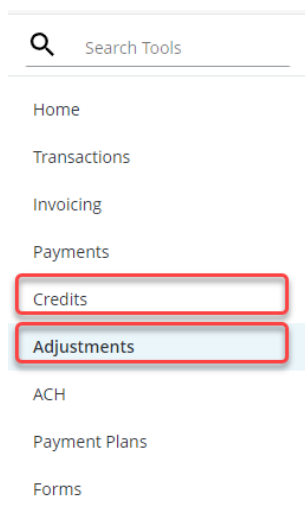
Search

Refresh

Transaction Date	Transaction Type	Item	Coverage	Invoice Date	Billing Period	Employee	Name	Amount
03/29/2023	Backout Payment	Medical	Medical Premium Plus / Premium Plus (WebTPA) - Bundled / Member Only	06/01/2023	06/01/2023-06/30/2023			\$601.42
03/29/2023	Backout Payment	Supplemental Employee Life	Supplemental Life - Employee / Supplemental Life - Employee / \$50,000	06/01/2023	06/01/2023-06/30/2023			\$72.10
03/29/2023	Backout Payment	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis	06/01/2023	05/01/2023-05/31/2023			\$717.75
03/29/2023	Backout Payment	Disability	Disability / Disability Benefit / 70% of Annual Compensation	06/01/2023	05/01/2023-05/31/2023			\$129.94

Credits and Adjustments

These options function similar to the Transaction, Invoicing and Payments screens. Use these to locate and view credits and adjustments related to your ministry's invoices.



ACH

An ACH account must be set up for you to pay your invoice balances online.

Billing Details

Search Tools

Home

Transactions

Invoicing

Payments

Credits

Adjustments

ACH

Payment Plans

Forms

Group
Employers

City

Name

Net Due
-\$240.48

Latest Activity	Date	Amount
Last Invoice	11/08/2022	\$6,094.65
Last Payment	08/25/2022	\$1,263.38
Last Credit	12/13/2022	\$18.23
Last Adjustment	11/08/2022	\$4,875.72

Invoice Preferences

Exclude From Invoicing

Receive Statement

Statement Display Salary

Statement Employee Grouping

Statement Sort

Update

1. Click **ACH** on the navigation menu.
Your Payment Summary, Banking Information, and Electronic Payment History display.

Group
Employers

City

Name

Net Due
\$240.48

Payment Summary

Current balance

Due date

- \$240.48

12/31/2022

Last payment received

Date received

\$1,263.38

08/25/2022

Banking Information

Bank Account Number

Bank Account Nickname

Account Holder

Bank Account Type

Bank Routing Number

Auto payment

No

Add New Account

Electronic payment history

Make one time electronic payment

Transaction Date ↓

Account Nickname ↑

Amount Paid ↑

Bank Account Number ↑

Auto payment ↑

Status ↑

Action

In this example, the Banking Information does not contain any accounts.

2. Click the **Add New Account** button.
The Add Banking Information window opens.

Add Banking Information

Bank Account Number

Bank Routing Number

John Doe
1234 Locust View Drive
San Francisco, CA 94108
Date 1/23/16/78
PAY TO THE ORDER OF \$ DOLLARS
Your Bank
1234 Locust View Drive
San Francisco, CA 94108
MEMO
123456789 987654321 1035
Routing Number Account Number Check Number

Bank Account Type

Bank Account Nickname

Account Holder

☐ Make automatic payments of the amount due from this account
☒ Do not make automatic payments from this account

Cancel Save

3. Type the account number in the **Bank Account Number** field.

Add Banking Information

Bank Account Number

Bank Routing Number

John Doe
1234 Locust View Drive
San Francisco, CA 94108
Date 1/23/16/78
PAY TO THE ORDER OF \$ DOLLARS
Your Bank
1234 Locust View Drive
San Francisco, CA 94108
MEMO
123456789 987654321 1035
Routing Number Account Number Check Number

4. Type the routing number in the **Bank Routing Number** field.

Bank Account Type

Checking Account

Bank Account Nickname

Employer Checking

Account Holder

ASLC

☒ Make automatic payments of the amount due from this account

☐ Do not make automatic payments from this account

Cancel Save

5. Click the drop-down arrow in the **Bank Account Type** field and select the account type. Checking and Savings are available.
6. Type a name for the account in the **Bank Account Nickname** field.
7. Type a name for the account holder in the **Account Holder** field.
8. Indicate whether you want to make automatic payments from this account.

If yes:

- Select the day you'd like your monthly automatic payments deducted from the dropdown menu.
- The full invoiced amount will be deducted from the account on that specific day of the month.
- Note: if the payment date falls on the weekend or a holiday, the payment will be processed the following business day.
- Click the **Save** button to proceed.

If no: Click the **Save** button to proceed.

9. The system returns to the Banking Details screen. The new account information displays in the Banking Information section.

Banking Information

Bank Account Number	Bank Account Nickname	Account Holder
	Employer Checking	
Bank Account Type	Bank Routing Number	Auto payment
Checking Account		Yes

Adding or Editing Automatic Payments

Update your automatic payment settings at any time by editing your banking information the ACH screen.

1. In the Banking Information section, click the pencil icon.

Banking Information

Bank Account Number
*****6789



Bank Account Nickname
LC Account

Bank Account Type
Checking Account

Account Holder
Your Lutheran Church

Bank Routing Number
110022334

Auto payment
No



2. Update your automatic payments preference and/or ACH Deduction Date. Click **Save**.

ACH Deduction Date

☒ Make automatic payments of the amount due from this account

☐ Do not make automatic payments from this account

Cancel

Save

Make a One Time Payment

If you don't set up automatic payments but want to pay online, use the **Make one time electronic payment** button on the ACH screen.

1. Click **Make one time electronic payment**.

Payments

Credits

Adjustments

ACH

Payment Plans

Forms

Payment Summary

Current balance
\$0.00

Due date
05/31/2023

Last payment received
\$353.58

Date received
04/21/2023

Banking Information

Bank Account Number
*****6789



Bank Account Nickname
LC Account

Bank Account Type
Checking Account

Bank Routing Number
110022334

Account Holder
Your Lutheran Church

Auto payment
No



Electronic payment history

Transaction Date ↓

Account Nickname ↓

Amount Paid ↓

Bank Account Number ↓

Auto payment ↓

Status ↓

Action

04/21/2023

LC Account

\$353.58

*****4321

No

Submitted

Make one time electronic payment

2. Enter the following information:

- **Amount:** Enter the Current Balance or desired payment amount.
- **Pre-fill info from:**
 - Choose **Banking information on file** to use an existing account.
 - Choose **Provide other banking information** to enter a new bank account.
Note: If you choose to provide other banking information, you must complete the remaining account information fields.
- **ACH Deduction Date:** Defaults to “today’s” date. Change to your desired payment date if needed.
- Click **Save**.

One Time Electronic Payment

Amount

Pre-fill info from

Provide other banking information

Bank Account Number

Bank Routing Number

John Doe
1234 Locust View Drive
San Francisco, CA 94108
Date: 1-04-2023
PAY TO THE ORDER OF: \$
DOLLARS
Your Bank
1234 Locust View Drive
San Francisco, CA 94108
MEMO:
123456789 987654321 1035
Routing Number Account Number Check Number

Bank Account Type

Bank Account Nickname

Account Holder

ACH Deduction Date: 04/26/2023

☐ Save the banking information

Cancel Save

Forms

You can view and download a PDF version of your invoices using the **Forms** section.

1. Click **Forms** in the navigation menu to view or download your invoice statement.
2. Select the **Employer Invoice** link under the Form Name column.

Note: The first invoice viewable in the Employer Portal is June 2023.

Search Tools

Home
Transactions
Invoicing
Payments
Credits
Adjustments
ACH
Payment Plans
Forms

Group: Employers
City:
Name:
Net Due:

Find Forms

Date Created
From: 01/31/2023 To: 05/01/2023

Billing Forms

Form Name	Date Created	Invoice Date	Billing Period
Employer Invoice	03/08/2023	05/01/2023	05/01/2023 - 05/31/2023
Employer Invoice	03/07/2023	04/01/2023	04/01/2023 - 04/30/2023

3. The invoice will download in a PDF format. Ensure your pop-up blocker is disabled.

CONCORDIA PLANS Page 1 of 4

INVOICE

ACCOUNT #:
INVOICE DATE: 02/01/2023
INVOICE #: 5748
BILLING PERIOD: 02/2023
PAYMENT DUE DATE: 2/28/2023

If you have questions about this invoice, please e-mail info@concordiaplans.org or call (888) 777-7526. Thank you!

ACCOUNT SUMMARY

Previous Balance	\$	
Payments	\$	
Current Charges	\$	
Adjustments	\$	
TOTAL AMOUNT DUE	\$	1,263.38

Changes/Correspondence: Please do not report any changes or enclose correspondence with your payment, our bank will not forward it to CPS.

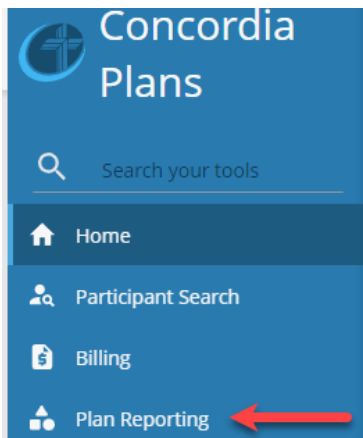
LAST PAYMENT RECEIVED

Post Date	Payment Amount	Check Number
1/25/2023	\$1,263.38	000009446

Please consider using our free and secure Online Payment System. Either "[Click Here](#)" or visit ConcordiaPlansEmployer.hroffice.com. You'll find the payment link on your Employer Portal dashboard.

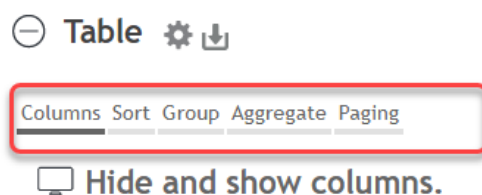
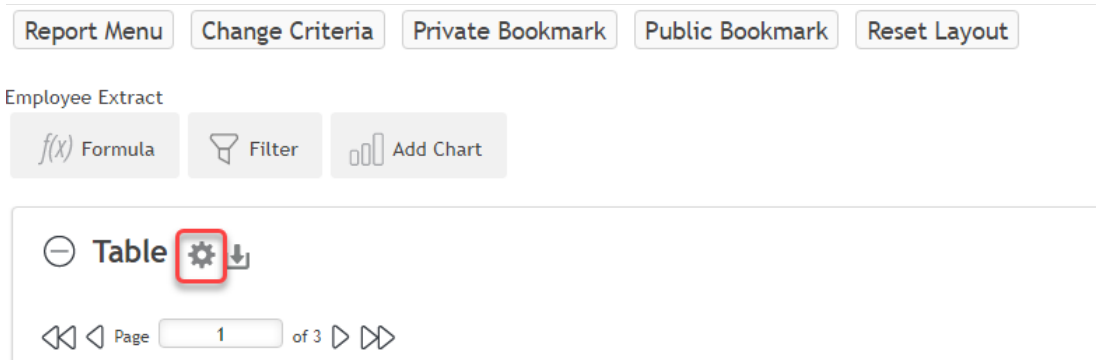
Plan Reporting

Invoice administrators can run various standard reports using the Plan Reporting menu.

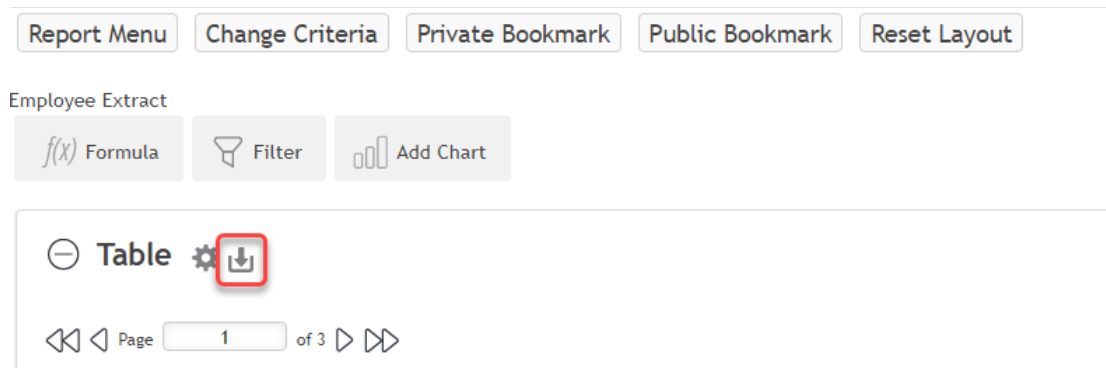


General Navigation

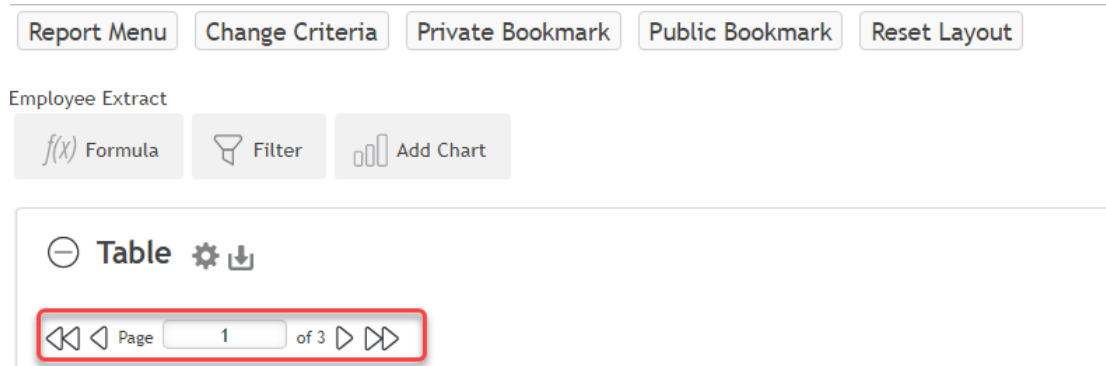
- Click **Plan Reporting** in the left navigation pane. The **Standard Reports** menu will open in a separate window.
- Click on the name of your desired report.
- Enter your desired report parameters and click **Run Report**.
- Within your report results:
 - Click the gear icon to hide or show columns or sort columns in a specific order.



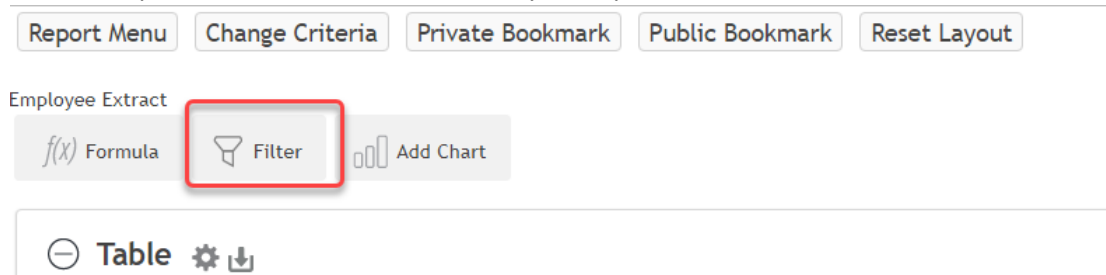
- Click the download icon to export your results to Excel, CSV or PDF.



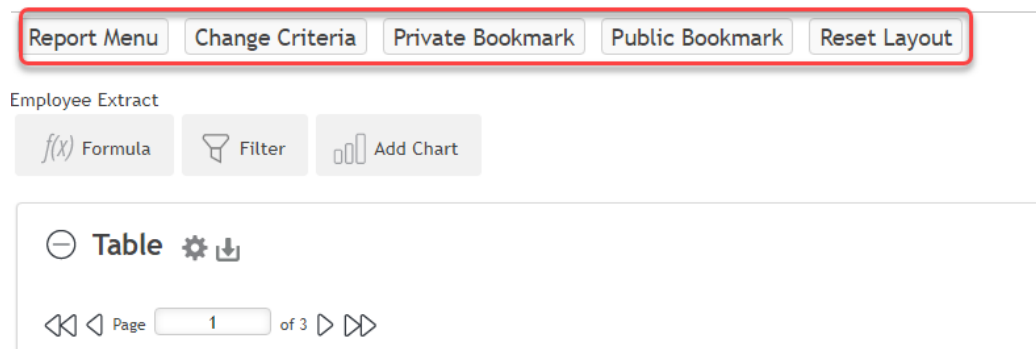
- Use the navigation arrows to scroll through the report results on your screen.



- Use the filter option to use additional filters on your report results.



- Use the options on the top row to perform the following actions:
 - **Report Menu:** Exit current screen and return to Standard report menu.
 - **Change Criteria:** Go back to parameters screen and change your report criteria.
 - **Private Bookmark:** Save this report and any formatting you applied as “favorite,” accessible to only you in the Private Bookmarks section of the Standard reports menu.
 - **Public Bookmark:** Save report for all users, regardless of who created them. **Because they are available to all users, we recommend you do not use the Public Bookmarks function.**
 - **Reset Layout:** Resets your report results to the standard layout, before updates to column visibility and additional sorting/filtering were added.



Standard Reports

Employee Extract

The Employee Extract shows list of employees and their demographic information at your ministry on a specific date. You may filter the report to include only active employees (or other worker statues.)

Report Parameters:

Employee Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer

<ALL>

Optionally select a specific eligibility set

<ALL>

active

adjuncts

intnlntmPas

intnlTransfer

Optionally select Work Statues to report

<ALL>

Active

Deceased

Disabled

Survivor

Terminated

Leave

Disabled - Pending

Retiree

Optionally enter a specific member ID

Select as of date

2023-03-08

Select language

English

Français

Run Report

Fields Included in Employee Extract Results:

- | | | | |
|---|---|---|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> SSN | <input checked="" type="checkbox"/> Home Address Change Date | <input checked="" type="checkbox"/> Date of Birth |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Street Address Line 1 | <input checked="" type="checkbox"/> Bad Address Indicator | <input checked="" type="checkbox"/> Date of Death |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Street Address Line 2 | <input checked="" type="checkbox"/> Mailing Preference Indicator | <input checked="" type="checkbox"/> Email Address |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> City | <input checked="" type="checkbox"/> Mailing Preference Indicator Effective Date | <input checked="" type="checkbox"/> Email Address Type |
| <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> State | <input checked="" type="checkbox"/> Member Eligibility Set | <input checked="" type="checkbox"/> Bad Email Address Indicator |
| <input checked="" type="checkbox"/> Middle Name | <input checked="" type="checkbox"/> Country | <input checked="" type="checkbox"/> Member Eligibility Set Effective Date | <input checked="" type="checkbox"/> Direct Bill Flag |
| <input checked="" type="checkbox"/> Salutation | <input checked="" type="checkbox"/> ZIP Code | <input checked="" type="checkbox"/> Gender | |
| <input checked="" type="checkbox"/> Suffix | <input checked="" type="checkbox"/> Address Type | <input checked="" type="checkbox"/> Phone Number | |

Dependent Extract

The Dependent Extract Shows list of employees and their dependents and benefits in which they are enrolled as of a specific date. You may filter the report to include only active employees (or other worker statuses) as well as for specific benefit types.

Report Parameters:

Dependent Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer

Optionally select a specific eligibility set

Optionally select Work Statuses to report

Optionally select benefit types to report

Optionally select dependent status to report

Optionally enter a specific member ID

Select as of date

Select language

Fields Included in Dependent Extract Results:

- | | | | |
|---|---|---|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> Suffix | <input checked="" type="checkbox"/> Dependent Middle Initial | <input checked="" type="checkbox"/> Dependent Benefit Description |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Date of Birth | <input checked="" type="checkbox"/> Dependent Gender | <input checked="" type="checkbox"/> Dependent Plan Description |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Gender | <input checked="" type="checkbox"/> Dependent Status | <input checked="" type="checkbox"/> Dependent Option Description |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Member Eligibility Set | <input checked="" type="checkbox"/> Dependent Relationship | <input checked="" type="checkbox"/> Dependent Coverage Effective Date |
| <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Member Eligibility Set Effective Date | <input checked="" type="checkbox"/> Dependent Date of Birth | <input checked="" type="checkbox"/> Dependent Coverage Term Date |
| <input checked="" type="checkbox"/> Middle Name | <input checked="" type="checkbox"/> Dependent Last Name | <input checked="" type="checkbox"/> Dependent Disabled Status | |
| <input checked="" type="checkbox"/> Salutation | <input checked="" type="checkbox"/> Dependent First Name | <input checked="" type="checkbox"/> Dependent QMSCO Status | |

Benefit Extract

The Benefit Extract shows list of employees and benefits in which they are enrolled as of a specific date. You may filter the report to include only active employees (or other worker statuses) as well as for specific benefit types.

Report Parameters:

Benefit Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select Employer

Optionally select a specific eligibility set

Optionally select employment statuses to report

Optionally select benefit types to report

Optionally enter a specific Employee ID

Select as of date

Select language

Run Report

Fields Included in Benefits Extract Results:

Not: EE = Employee; ER = Employer. EE costs will display only if your ministry has provided your cost share to CPS.

- | | | | |
|---|---|--|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> Suffix | <input checked="" type="checkbox"/> Option Description | <input checked="" type="checkbox"/> EE Annual Cost |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Date of Birth | <input checked="" type="checkbox"/> Amount Elected | <input checked="" type="checkbox"/> ER Pay Period Cost |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Gender | <input checked="" type="checkbox"/> Amount In Force | <input checked="" type="checkbox"/> ER Annual Cost |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Member Eligibility Set | <input checked="" type="checkbox"/> Amount Pended | <input checked="" type="checkbox"/> Imputed Income Per Pay Cost |
| <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Member Eligibility Set Effective Date | <input checked="" type="checkbox"/> Begin Date | <input checked="" type="checkbox"/> Imputed Income Annual Cost |
| <input checked="" type="checkbox"/> Middle Name | <input checked="" type="checkbox"/> Benefit Description | <input checked="" type="checkbox"/> End Date | |
| <input checked="" type="checkbox"/> Salutation | <input checked="" type="checkbox"/> Plan Description | <input checked="" type="checkbox"/> EE Pay Period Cost | |

Enrollment Elections

The Enrollment Elections Report Shows list of employee elections for specific benefits as of a specific date range. You may filter the report to include only active employees (or other worker statuses), specific benefits and specific life events.

Report Parameters:

Enrollment Elections Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer

Optionally select a specific eligibility set

Optionally select employment statuses to report

Optionally select benefit(s) to report

Optionally select event(s) to report

Optionally enter a specific member ID

Select start date for election retrieval is based on event effective date

Select end date for election retrieval is based on event effective date

Select as of date

Select language

Run Report

Fields Included in Enrollment Elections Results:

Note: EE = Employee; ER = Employer. EE costs will display for CHP only if your ministry provided your cost share to CPS.

- | | | | |
|---|---|---|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> Gender | <input checked="" type="checkbox"/> Benefit Description | <input checked="" type="checkbox"/> EE Pay Period Cost |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Member Eligibility Set | <input checked="" type="checkbox"/> Plan Description | <input checked="" type="checkbox"/> EE Annual Cost |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Member Eligibility Set Effective Date | <input checked="" type="checkbox"/> Option Description | <input checked="" type="checkbox"/> ER Pay Period Cost |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Benefit Event Name | <input checked="" type="checkbox"/> Amount Elected | <input checked="" type="checkbox"/> ER Annual Cost |
| <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Benefit Event Status | <input checked="" type="checkbox"/> Amount In Force | <input checked="" type="checkbox"/> Imputed Income Per Pay Cost |
| <input checked="" type="checkbox"/> Middle Name | <input checked="" type="checkbox"/> Benefit Event Date | <input checked="" type="checkbox"/> Amount Pended | <input checked="" type="checkbox"/> Imputed Income Annual Cost |
| <input checked="" type="checkbox"/> Salutation | <input checked="" type="checkbox"/> Benefit Event End Date | <input checked="" type="checkbox"/> Election Status | |
| <input checked="" type="checkbox"/> Suffix | <input checked="" type="checkbox"/> Elections Last Saved | <input checked="" type="checkbox"/> Coverage Effective Date | |
| <input checked="" type="checkbox"/> Date of Birth | <input checked="" type="checkbox"/> Event Expired | <input checked="" type="checkbox"/> Date Elected | |

Enrollment Status

The Enrollment Status Report Shows list of employee enrollment events and the events' statuses as of a specific date range. You may filter the report to include only active employees (or other worker statuses), specific benefits and specific life events.

Report Parameters:

Enrollment Status Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer

Optionally select a specific eligibility set

Optionally select employment statuses to report

Optionally select event(s) to report

Optionally enter a specific member ID

Select start date for election retrieval is based on event effective date

Select end date for election retrieval is based on event effective date

Select as of date

Select language

Run Report

Fields Included in Enrollment Status Results:

- | | | | |
|---|--|---|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> Suffix | <input checked="" type="checkbox"/> Country | <input checked="" type="checkbox"/> Member Eligibility Set Effective Date |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Gender | <input checked="" type="checkbox"/> Zip CODE | <input checked="" type="checkbox"/> Benefit Event |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Date Of Birth | <input checked="" type="checkbox"/> Email | <input checked="" type="checkbox"/> Benefit Event Status |
| <input checked="" type="checkbox"/> Last NAME | <input checked="" type="checkbox"/> Address Line 1 | <input checked="" type="checkbox"/> Mailing Address Change Date | <input checked="" type="checkbox"/> Benefit Event Date |
| <input checked="" type="checkbox"/> First NAME | <input checked="" type="checkbox"/> Address Line 2 | <input checked="" type="checkbox"/> Mailing Preference Indicator | <input checked="" type="checkbox"/> Elections Last Saved |
| <input checked="" type="checkbox"/> Middle NAME | <input checked="" type="checkbox"/> City | <input checked="" type="checkbox"/> Mailing Preference Indicator Effective Date | <input checked="" type="checkbox"/> Event End Date |
| <input checked="" type="checkbox"/> Salutation | <input checked="" type="checkbox"/> State | <input checked="" type="checkbox"/> Member Eligibility Set | <input checked="" type="checkbox"/> Event EXPIRED |

Member/Benefit/Cost Extract

The Member/Benefit/Cost Extract shows list of your employees' enrolled benefits, coverage and costs as of a specific date range. You may filter the report to include only active employees (or other worker statuses) and specific benefits. A large number of fields (columns) included in the results of this report. To reduce the size of this report, we recommend filtering by only benefit type(s) you're interested in viewing.

Report Parameters:

Member/Benefit/Cost Extract (wide format)

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer

Optionally select a specific eligibility set

Optionally select employment statuses to report

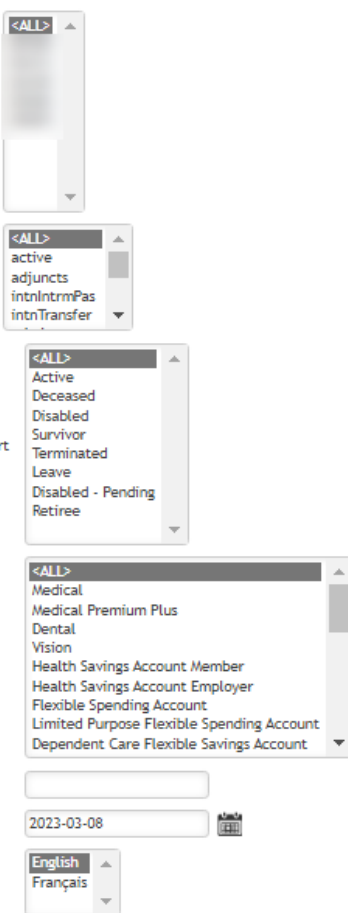
Optionally select benefit(s) types to report

Optionally enter a specific member ID

Select as of date

Select language

Run Report



The form contains the following elements:

- A dropdown menu for employer selection, currently showing "<ALL>".
- A dropdown menu for eligibility set selection, currently showing "<ALL>". The list includes: active, adjuncts, intnlIntrmPas, and intnlTransfer.
- A dropdown menu for employment status selection, currently showing "<ALL>". The list includes: Active, Deceased, Disabled, Survivor, Terminated, Leave, Disabled - Pending, and Retiree.
- A dropdown menu for benefit type selection, currently showing "<ALL>". The list includes: Medical, Medical Premium Plus, Dental, Vision, Health Savings Account Member, Health Savings Account Employer, Flexible Spending Account, Limited Purpose Flexible Spending Account, and Dependent Care Flexible Savings Account.
- An input field for member ID.
- An input field for the date, currently showing "2023-03-08".
- A dropdown menu for language selection, currently showing "English". The list includes: English and Français.
- A "Run Report" button.

Fields Included in Member/Benefit/Cost Extract Results (sample):

Note: EE = Employee; ER = Employer. EE costs will display for CHP only if your ministry provided your cost share to CPS.

<input checked="" type="checkbox"/> (All)	<input checked="" type="checkbox"/> Health Savings Account Employer Plan Description	<input checked="" type="checkbox"/> Accidental Death & Dismemberment EE Monthly Cost	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage Plan Description
<input checked="" type="checkbox"/> As Of Date	<input checked="" type="checkbox"/> Health Savings Account Employer Option Description	<input checked="" type="checkbox"/> Accidental Death & Dismemberment ER Monthly Cost	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage Option Description
<input checked="" type="checkbox"/> Employer	<input checked="" type="checkbox"/> Health Savings Account Employer Amount Elected	<input checked="" type="checkbox"/> Accidental Death & Dismemberment Imputed Income Per Pay Cost	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage Amount Elected
<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Health Savings Account Employer Amount Inforce	<input checked="" type="checkbox"/> Accidental Death & Dismemberment Imputed Income Annual Cost	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage Amount Inforce
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Health Savings Account Employer EE Monthly Cost	<input checked="" type="checkbox"/> Accidental Injury Insurance Plan Description	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage EE Monthly Cost
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Health Savings Account Employer ER Monthly Cost	<input checked="" type="checkbox"/> Accidental Injury Insurance Option Description	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage ER Monthly Cost
<input checked="" type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Health Savings Account Employer Imputed Income Per Pay Cost	<input checked="" type="checkbox"/> Accidental Injury Insurance Amount Elected	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage Imputed Income Per Pay Cost
<input checked="" type="checkbox"/> Salutation	<input checked="" type="checkbox"/> Health Savings Account Employer Imputed Income Annual Cost	<input checked="" type="checkbox"/> Accidental Injury Insurance Amount Inforce	<input checked="" type="checkbox"/> CRSP 403(b) After-Tax Roth Percentage Imputed Income Annual Cost
<input checked="" type="checkbox"/> Suffix	<input checked="" type="checkbox"/> Flexible Spending Account Plan Description	<input checked="" type="checkbox"/> Accidental Injury Insurance EE Monthly Cost	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Plan Description
<input checked="" type="checkbox"/> SSN	<input checked="" type="checkbox"/> Flexible Spending Account Option Description	<input checked="" type="checkbox"/> Accidental Injury Insurance ER Monthly Cost	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Option Description
<input checked="" type="checkbox"/> Address Line 1	<input checked="" type="checkbox"/> Flexible Spending Account Amount Elected	<input checked="" type="checkbox"/> Accidental Injury Insurance Imputed Income Per Pay Cost	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Amount Elected
<input checked="" type="checkbox"/> Address Line 2	<input checked="" type="checkbox"/> Flexible Spending Account Amount Inforce	<input checked="" type="checkbox"/> Accidental Injury Insurance Imputed Income Annual Cost	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Amount Inforce
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Flexible Spending Account EE Monthly Cost	<input checked="" type="checkbox"/> Critical Illness Employee Plan Description	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) EE Monthly Cost
<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Flexible Spending Account ER Monthly Cost	<input checked="" type="checkbox"/> Critical Illness Employee Option Description	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) ER Monthly Cost
<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> Flexible Spending Account Imputed Income Per Pay Cost	<input checked="" type="checkbox"/> Critical Illness Employee Amount Elected	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Imputed Income Per Pay Cost
<input checked="" type="checkbox"/> Zip Code	<input checked="" type="checkbox"/> Flexible Spending Account Imputed Income Annual Cost	<input checked="" type="checkbox"/> Critical Illness Employee Amount Inforce	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Imputed Income Annual Cost
<input checked="" type="checkbox"/> Mailing Address Change Date	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account Plan Description	<input checked="" type="checkbox"/> Critical Illness Employee EE Monthly Cost	<input checked="" type="checkbox"/> Concordia Retirement Plan (Pension) Option Description
<input checked="" type="checkbox"/> Bad Address Indicator	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account Option Description	<input checked="" type="checkbox"/> Critical Illness Employee ER Monthly Cost	<input checked="" type="checkbox"/> Basic Life - Employee Plan Description
<input checked="" type="checkbox"/> Mailing Preference Indicator	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account Amount Elected	<input checked="" type="checkbox"/> Critical Illness Employee Imputed Income Per Pay Cost	<input checked="" type="checkbox"/> Basic Life - Employee Option Description
<input checked="" type="checkbox"/> Mailing Preference Indicator Eff Date	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account Amount Inforce	<input checked="" type="checkbox"/> Critical Illness Employee Imputed Income Annual Cost	<input checked="" type="checkbox"/> Basic Life - Employee Amount Elected
<input checked="" type="checkbox"/> Member Eligibility Set	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account EE Monthly Cost	<input checked="" type="checkbox"/> Critical Illness Spouse Plan Description	<input checked="" type="checkbox"/> Basic Life - Employee Amount Inforce
<input checked="" type="checkbox"/> Member Eligibility Set Eff Date	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account ER Monthly Cost	<input checked="" type="checkbox"/> Critical Illness Spouse Option Description	<input checked="" type="checkbox"/> Basic Life - Employee EE Monthly Cost
<input checked="" type="checkbox"/> Employment Status Code	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account Imputed Income Per Pay Cost	<input checked="" type="checkbox"/> Critical Illness Spouse Amount Elected	<input checked="" type="checkbox"/> Basic Life - Employee ER Monthly Cost
<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> Limited Purpose Flexible Spending Account Imputed Income Annual Cost	<input checked="" type="checkbox"/> Critical Illness Spouse Amount Inforce	<input checked="" type="checkbox"/> Basic Life - Employee Imputed Income Per Pay Cost
<input checked="" type="checkbox"/> Date Of Birth	<input checked="" type="checkbox"/> Health Reimbursement Arrangement Plan Description	<input checked="" type="checkbox"/> Critical Illness Spouse EE Monthly Cost	<input checked="" type="checkbox"/> Basic Life - Employee Imputed Income Annual Cost
<input checked="" type="checkbox"/> Date Of Death	<input checked="" type="checkbox"/> Health Reimbursement Arrangement Option Description	<input checked="" type="checkbox"/> Critical Illness Spouse ER Monthly Cost	<input checked="" type="checkbox"/> Basic Life - Spouse Plan Description
—	—	—	<input checked="" type="checkbox"/> Basic Life - Spouse Option Description

Dependent Change Extract

The Dependent Change Extract lists changes to your workers' dependents that occurred within a specific time period, including the previous benefit values and the new benefit values. You may filter the report to include only active employees (or other worker statuses).

Hint: Use the calendar icon to enter your date range or type your dates in a YYYY-MM-DD format.

Report Parameters:

Dependent Change Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer

Optionally select a specific eligibility set

Optionally select employment statuses to report

Optionally enter a specific member ID

Select Start date to report

Select End date to report

Select language

Run Report

Fields Included in Dependent Change Extract Results:

<input checked="" type="checkbox"/> (All)	<input checked="" type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Change Type	<input checked="" type="checkbox"/> Coverage Effective Date
<input checked="" type="checkbox"/> Employer	<input checked="" type="checkbox"/> Salutation	<input checked="" type="checkbox"/> Dependent Name	<input checked="" type="checkbox"/> Coverage Term Date
<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Suffix	<input checked="" type="checkbox"/> Dependent Date of Birth	<input checked="" type="checkbox"/> Disabled Status
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Event Name	<input checked="" type="checkbox"/> Relationship	<input checked="" type="checkbox"/> Dependent Status
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Effective Date of the Change	<input checked="" type="checkbox"/> Benefit	<input checked="" type="checkbox"/> QMOSCO Status

Organization Extract

The Organization Extract displays your ministry’s CPS Employer ID (organization ID) and Federal ID number (Employer Identification Number.)

Report Parameters:

Organization Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select organization(s) to report

Select as of date03/08/2023

Select languageEnglishFrançais

Run Report

Organization Extract Results:

Table

Organization ID	Organization Name	Organization Description	Parent Organization ID	Employer Identification Number
			CPS	

Fields Included in User Account Extract Results:

- ☒ Organization ID
- ☒ Organization Description
- ☒ Employer Identification Number
- ☒ Organization Name
- ☒ Parent Organization ID

Organization Benefits

The Organization Benefits Report displays a listing of the benefits offered by your ministry.

Report Parameters:
Organization Benefits Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select organization(s) to report

<ALL>
07015
07026

Optionally select benefit(s) to report

<ALL>
Accidental Injury Insurance
Basic Life
Basic Spouse Life
Travel Accident Insurance
Basic Child Life
Critical Illness Child
Critical Illness Employee
Critical Illness Spouse
Dependent Care Flexible Savings Account

Select as of date

04/18/2023

Select language

English
Français

Run Report

Organization Benefits Results:

Table

<< 1 of 13 >>

Organization ID	Organization Name	Parent Organization ID	Employer Identification Number	Benefit Description	Plan Description	Feature Description	Feature Number Value	Feature String Value
-----------------	-------------------	------------------------	--------------------------------	---------------------	------------------	---------------------	----------------------	----------------------

Fields Included in Dependent Extract Results:

- ☒ (All)
- ☒ Organization Name
- ☒ Employer Identification Number
- ☒ Feature Description
- ☒ As Of Date
- ☒
- ☒ Benefit Description
- ☒ Feature Number Value
- ☒ Organization ID
- ☒ Parent Organization ID
- ☒ Plan Description
- ☒ Feature String Value

Custom Reports

Member Cost File

The Member Cost File provides details about the benefit changes that occurred between two dates. The Member Cost information provided on your monthly mailed provides data from this report.

Report Parameters:

Member Cost File

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer:

Optionally select benefit(s) to report:

Optionally enter a specific Employee ID:

Select the start or begin date of the date range desired

Select the end date of the date range desired

Select language:

Run Report

Fields Included in Member Cost File Results:

- | | | | |
|---|--|--|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> SSN | <input checked="" type="checkbox"/> Option Name | <input checked="" type="checkbox"/> ER Cost per Period |
| <input checked="" type="checkbox"/> Report Date | <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Pay Frequency | <input checked="" type="checkbox"/> Imputed Income Per Pay Cost |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Amount Goal Amount | <input checked="" type="checkbox"/> Benefit Start Date |
| <input checked="" type="checkbox"/> CPS Member ID | <input checked="" type="checkbox"/> Benefit Name | <input checked="" type="checkbox"/> Current Volume | <input checked="" type="checkbox"/> Benefit End Date |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Plan Name | <input checked="" type="checkbox"/> EE Cost per Period | <input checked="" type="checkbox"/> Benefit Change Date |

Member Cost Full File

The Member Cost Full File provides a current view (enrolled benefits) of each member's coverage and costs as of specified coverage effective date.

Report Parameters:

Member Cost Full File

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer:

Optionally select benefit(s) to report:

-Select All-
acdntIns - Accidental Injury Insurance
basicLife - Basic Life - Employee
basicSplf - Basic Life - Spouse
bta - Travel Accident Insurance
chBasicLf - Basic Life - Child
critIllCh - Critical Illness Child
critIllEmp - Critical Illness Employee

Optionally enter a specific Employee ID:

Select as of date

04/01/2023

📅

Select language:

English
French

Run Report

Fields Included in Member Cost File Results:

- | | | | |
|---|--|--|---|
| <input checked="" type="checkbox"/> (All) | <input checked="" type="checkbox"/> SSN | <input checked="" type="checkbox"/> Option Name | <input checked="" type="checkbox"/> ER Cost per Period |
| <input checked="" type="checkbox"/> As of Date | <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Pay Frequency | <input checked="" type="checkbox"/> Imputed Income Per Pay Cost |
| <input checked="" type="checkbox"/> Employer | <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Amount Goal Amount | <input checked="" type="checkbox"/> Benefit Start Date |
| <input checked="" type="checkbox"/> CPS Member ID | <input checked="" type="checkbox"/> Benefit Name | <input checked="" type="checkbox"/> Current Volume | <input checked="" type="checkbox"/> Benefit End Date |
| <input checked="" type="checkbox"/> Employee ID | <input checked="" type="checkbox"/> Plan Name | <input checked="" type="checkbox"/> EE Cost per Period | |

Bookmarks



Bookmarks provide the ability to retrieve copies of report structures that were run previously. All selection criteria, grid layouts, and formats from the bookmarked reports remain intact. After running each Standard Report there will appear a pair of buttons, **Private Bookmark** and **Public Bookmark**, that when clicked prompt the user to name the report for saving. The saved report may be retrieved later from the appropriate Bookmark link.

Bookmarks	
Bookmarks provide the user the ability to retrieve copies of reports previously run with all the selection criteria, grid layouts and formats remaining intact. Each Standard Report provides a 'Save' link that when clicked will prompt the user for a Bookmark name to save the report under. The saved report can then be retrieved from the Bookmark page linked below.	
Report	Description
Private Bookmarks	Run and manage private bookmarked reports.
Public Bookmarks	Run and manage public bookmarked reports.

Private Bookmarks are available only for the user who created them.

Report	Description
Private Bookmarks	Run and manage private bookmarked reports.
Public Bookmarks	Run and manage public bookmarked reports.

- Click the **Private Bookmarks** link.
The previously saved Private Bookmark from the earlier example displays.

Private Bookmarks Report			
Report	Description	Save Date	Actions
Employee%20Extract	Example Private Bookmark	2023/01/12 06:13:08	  

Three icons display to the right of each saved bookmark:

- Run** (running person) – runs the report using the previously saved parameters
- Edit** (pencil) – opens a dialog box for renaming the report bookmark
- Delete** (X) – opens a dialog box, prompting the user to confirm deletion of the bookmark
- Click the **Run** icon to open a report from its bookmark.

The report opens. Note that the report shows current data that matches the saved parameters. It may differ in content from the last run instance of the report.

Public Bookmarks are available for all users, regardless of who created them. Because these are available to all users, we recommend you do not use this function.

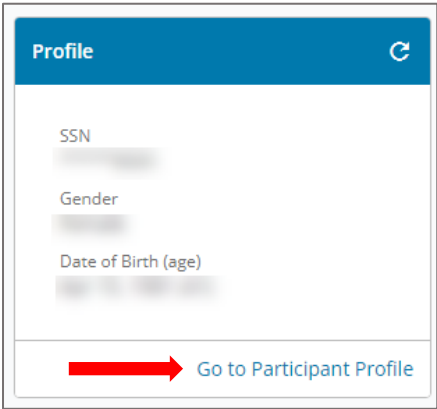
Exploring the Participant Profile

The Participant Summary screen displays a snapshot of the member’s information, including cards for **Profile**, **Dependents**, **Coverage**, **Finance**, and **Required Documents**. The Participant menu is where you can perform a majority of your benefits administration functions.

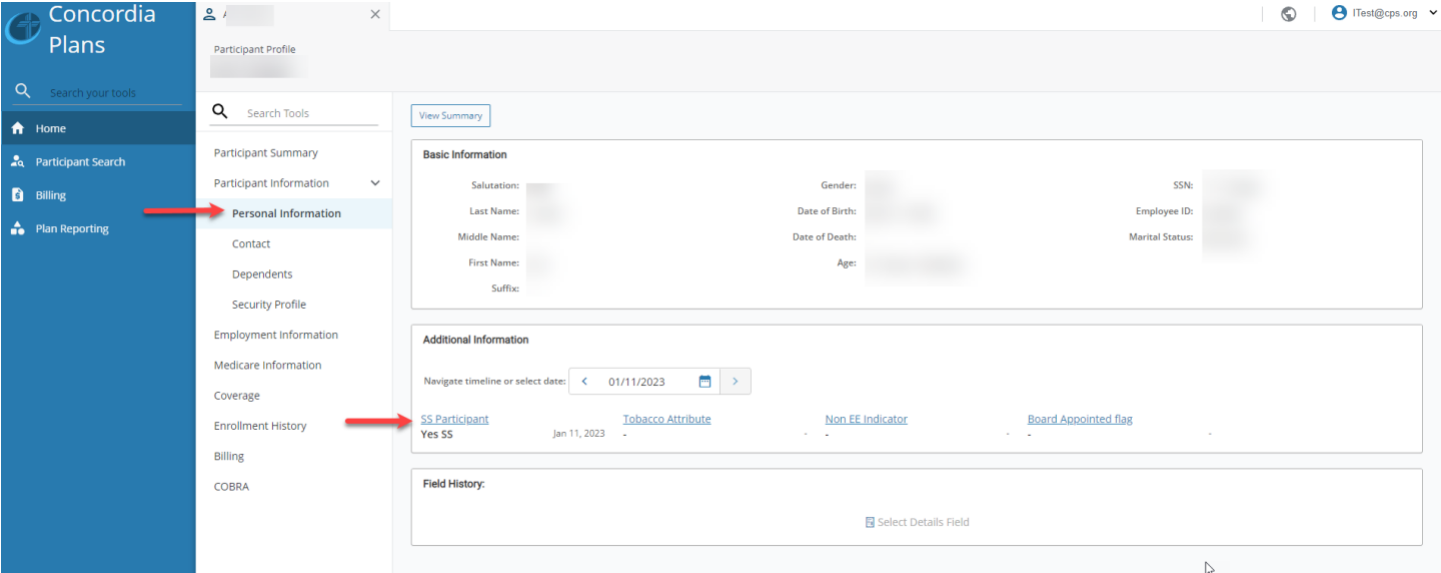
Click the link at the bottom of each card to open a screen with more information.

Profile

The Profile Screen displays sections for Basic and Additional Information about the selected member.



- 1. Click the **Go to Participant Profile** link.
The Personal Information screen displays and is highlighted on the member navigation menu.



If data displays for a link, click a link to display its updates in the **Field History** section.
Field History shows the date of the change and value that was entered on that date.

Field History: SS Participant			
Value ↕	Effective Date ↕	Entry Date ↕	Source ↕
Yes SS	Jan 11, 2023	Jan 11, 2023	(User: MS Administrator)

View Summary

Note the row of buttons at the top of the Personal Information screen. The **Summary** screen displays detailed demographic information for the selected member. Scroll down to view Employment Information, Coverage, Dependent Information and Beneficiary Associations.

The screenshot shows the 'Participant Profile' window for Concordia Plans. On the left is a navigation menu with options: Home, Participant Search, Billing, and Plan Reporting. The 'Participant Information' dropdown is expanded, showing 'Personal Information' as the selected option. In the main content area, the 'View Summary' button is highlighted with a red box. Below it, the 'Basic Information' section displays fields for Salutation, Last Name, Middle Name, First Name, Suffix, Gender, Date of Birth, Date of Death, Age, SSN, Employee ID, and Marital Status. The 'Additional Information' section includes a date picker set to 01/11/2023 and links for SS Participant, Tobacco Attribute, Non EE Indicator, and Board Appointed flag. The 'Field History' section is at the bottom with a 'Select Details Field' button.

1. Click the **View Summary** button.
The Employee – Basic Information, Additional Information, and Contact sections display.

The screenshot shows the 'Employee Summary' screen. At the top are 'Go Back' and 'Print Summary' buttons. The screen is divided into four main sections: 'Employee - Basic Information', 'Employee - Additional Information', 'Contact - Address', and 'Contact - E-mail'. Each section contains detailed demographic and contact data for the selected employee.

Employee - Basic Information									
Salutation:		Gender:		SSN:					
Last Name:		Date of Birth:		Employee ID:					
Middle Name:		Date of Death:		Marital Status:					
First Name:		Age:							
Suffix:									

Employee - Additional Information				
SS Participant	Tobacco Attribute	Non EE Indicator	Board Appointed flag	
Yes SS	Jan 11, 2023	-	-	-

Contact - Address								
Preferred	Address Type	Effective Date	Address 1	Address 2	City	State	ZIP Code	Country
<input checked="" type="radio"/>	Home	01/13/2023		-				US

Contact - E-mail			
Preferred	E-mail Type	Start Date	Address
<input checked="" type="radio"/>	Home	01/01/2023	

2. Scroll down to view the member's **Employment Information** section.

This section includes the member's current employment and salary details.

Employment Information					
Company	ACA Eligibility Override	Billing Department	CDSP Override	CDSP Override ER	
Aug 7, 2019	-	-	-	-	-
CHP Continuous Coverage Date	CHP EE Choice Override	CHP Grandfathered	CHP Months of Service	CHP Override	
-	-	-	-	-	-
CHP Override ER	CHP Tier Override	CRP Months of Service	CRSP Universal Avail	Date of Hire	
-	-	-	-	-	-
Dis Medicare Primary Pay	Disability - Last Day Worked Eff	Disability Type	Employment Status	ER Paid Extensions	
-	Date	-	Active	Aug 7, 2019	-
Hourly/Salary Code	IIP Flag	ITP Flag	Job Code	Job Title	
Salary	Aug 7, 2019	-	E-PRSTCHR	Aug 7, 2019	-

Scroll down to view the member's **Coverage** section.

This section includes the member's current coverage details.

Note: The first "Event" you will see for all of your workers is called "Conversion Recalc." This indicates the date that the member's information was transferred into the Lifeworks Employer Portal.

Supplemental Life - Employee											
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Supplemental Life - Employee	\$150,000	\$150,000.00	-	-	Voluntary Benefits Change (03/01/2023)	03/01/2023	-	\$0.00	\$0.00	\$0.00
Supplemental Life - Child											
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Supplemental Life - Child	Decline Coverage	-	-	-	Voluntary Benefits Change (03/01/2023)	03/01/2023	-	\$0.00	\$0.00	\$0.00

3. Scroll down to view the member's **Dependent Information** section.

This section includes the names of the member's dependents and their eligibility statuses.

Dependent Information				
Name	SSN	Relationship	Gender	Status
		Child	Female	Eligible Dependent

4. Scroll down to view the member's **Beneficiary Associations and Medicare** sections. These sections include the names of the member's beneficiaries and the member's Medicare status. If the member has not allocated any beneficiaries, you will see "No items to display."

Beneficiary Associations						
Basic Life - Employee > Basic Life						
Name	SSN	Effective date	End Date	Primary	Percent	Relationship
[REDACTED]	-	11/15/2021	-	No	20.00%	Child
[REDACTED]	-	11/15/2021	-	No	20.00%	Child
[REDACTED]	-	11/15/2021	-	No	20.00%	Child

5. When finished viewing this screen, scroll to the top and click **Go Back** to return to the main profile view.

Go BackPrint Summary

Employee - Basic Information

Salutation: [REDACTED]

Last Name: [REDACTED]

Middle Name: [REDACTED]

First Name: [REDACTED]

Suffix: [REDACTED]

Gender: [REDACTED]

Date of Birth: [REDACTED]

Date of Death: [REDACTED]

Age: [REDACTED]

SSN: [REDACTED] ShowCopy

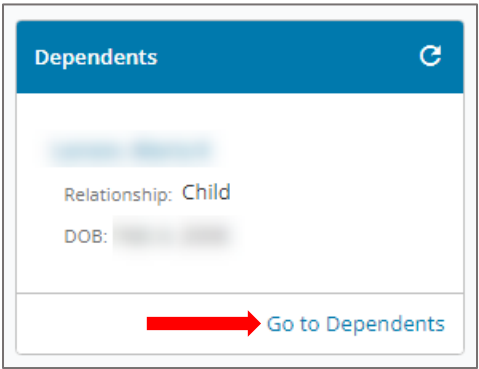
Employee ID: [REDACTED]

Marital Status: [REDACTED]

Dependents

Click the Participant Summary link in the left navigation menu to return to the summary page.

The Dependents card shows you the member’s dependent information.



- 1. Click **Participant Summary** on the member’s navigation menu and click the **Go to Dependents** link from the Dependents widget.
The list of the member’s dependents displays.

Name	Relationship	DOB ^	Status	Status Effective Date	Enrolled
[blurred]	Child	[blurred]	Eligible Dependent	01/01/2023	No

- 2. If more than one dependent displays, click a dependent’s name to display the details.

Participant Summary

Dependent Information

Contact

Coverage

Edit Dependent

Basic Information

Last Name: [blurred]

Gender: [blurred]

SSN: [blurred] Show Copy

Middle Name: [blurred]

Date of Birth: [blurred]

Also Employee: [blurred]

First Name: [blurred]

Date of Death: [blurred]

Suffix: -

Age: [blurred]

Additional Information

Dependent Reimbursement Amount

Dependent Relationship History

Dependent Status History

Dependent Disabled Indicator

-

Child

Eligible Dependent

-

Jan 13, 2023

Sep 15, 2022

Jan 1, 2023

-

Dependent Student Status

Dependent Marital Status

Dependent Medicare Eligible Indicator

Tobacco/Smoke Status

Yes

-

-

-

- Click a link in the Additional Information section to see its Entry Date in the Field History section.

Additional Information

Dependent Reimbursement Amount	Dependent Relationship History Child	Dependent Status History Eligible Dependent	Dependent Disabled Indicator
-	Sep 15, 2022	Jan 1, 2023	-
Dependent Student Status Yes	Dependent Marital Status	Dependent Medicare Eligible Indicator	Tobacco/Smoke Status
Jan 13, 2023	-	-	-
Working Spouse (for prem surcharge)	-	-	-

Field History: Dependent Student Status

Value	Effective Date	Entry Date	Source
Yes	Jan 13, 2023	Jan 13, 2023	(Process: -, User: -)

- Click the **Contact** link to display the dependent's contact information. If the Dependent's address is the same as the member's (most common), you will see "Participant's preferred address."

[Dependent Information](#)
[Contact](#)

Add Dependent Address

Participant's preferred address.

- Click the **Coverage** link to display the dependent's health coverage information (if applicable).

[Dependent Information](#)
[Contact](#)
[Coverage](#)

Edit Dependent Coverage

Benefit	Plan	Start Date	End Date
Medical	Healthy Me HSA - A (BCBS)	04/01/2023	-
Dental	Dental Plus Unbundled	04/01/2023	-
Vision	Vision Basic Unbundled	04/01/2023	-
Wellness/EAP	Vitality - CHP	04/01/2023	-

If your ministry does not offer the Concordia Health Plan (CHP) or the dependent is not enrolled in the CHP, you will see the message "No items to display" on this screen.

[Dependent Information](#)
[Contact](#)
[Coverage](#)

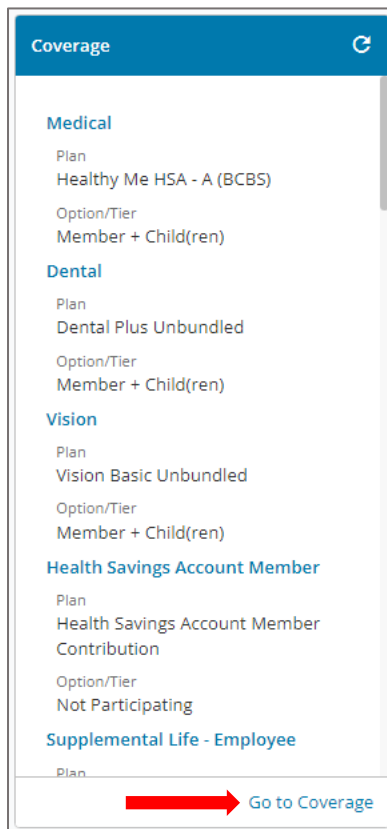
Edit Dependent Coverage

No items to display

Coverage

Click the Participant Summary link in the left navigation menu to return to the summary page.

The Coverage card shows you the member's current and historical coverage information.



1. Click the **Go to Coverage** link from the Coverage card to view details regarding the member's current coverage.

Current

History

Employee Set

Non-Rostered

Download Confirmation Statement

Update Coverage

Medical

Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
		Healthy Me HSA - A (BCBS)	Member + Child(ren)	-	-	Approved Administrative (04/01/2023)			\$1,391.76	\$0.00	\$1,391.76

Dental

Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
		Dental Plus Unbundled	Member + Child(ren)	-	-	Approved Administrative (04/01/2023)			\$74.93	\$0.00	\$74.93

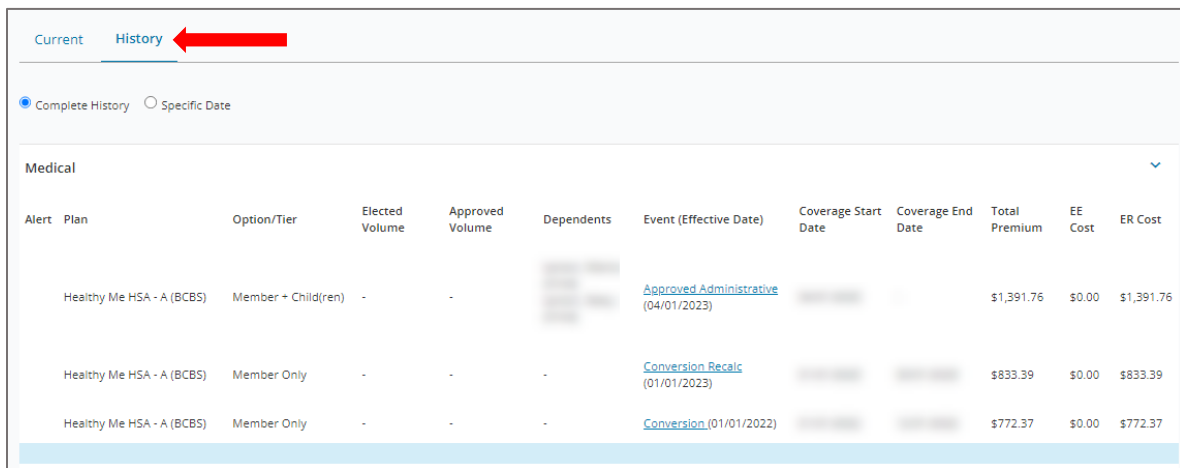
Vision

Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
		Vision Basic Unbundled	Member + Child(ren)	-	-	Approved Administrative (04/01/2023)			\$26.47	\$0.00	\$26.47

2. Scroll down the screen to review all member and dependent coverage information.

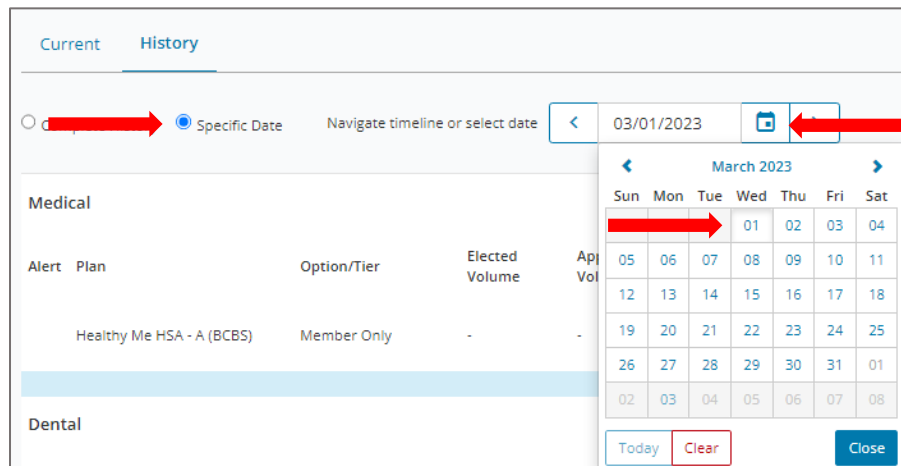
3. Click the **History** link.

The member's complete coverage history shows. This tab also includes coverage elections that have already been entered and will take effect in the future.



Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Healthy Me HSA - A (BCBS)	Member + Child(ren)	-	-		Approved Administrative (04/01/2023)			\$1,391.76	\$0.00	\$1,391.76
	Healthy Me HSA - A (BCBS)	Member Only	-	-	-	Conversion Recalc (01/01/2023)			\$833.39	\$0.00	\$833.39
	Healthy Me HSA - A (BCBS)	Member Only	-	-	-	Conversion (01/01/2022)			\$772.37	\$0.00	\$772.37

4. To view the member's coverage on a specific date, click the **Specific Date** option.



Current History

☐ Complete History ☒ Specific Date

Navigate timeline or select date < 03/01/2023 >

Medical

Alert	Plan	Option/Tier	Elected Volume	Approved Volume
	Healthy Me HSA - A (BCBS)	Member Only	-	-

Dental

March 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		01	02	03	04	
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

Today Clear Close

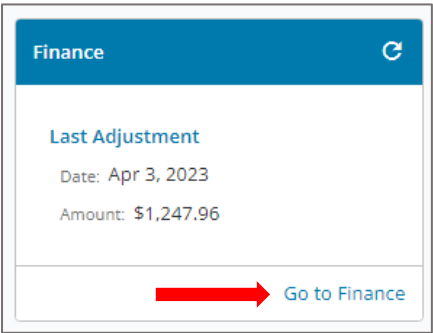
5. Click the **calendar icon** to select a new date.

The system shows coverage data as of the selected date.

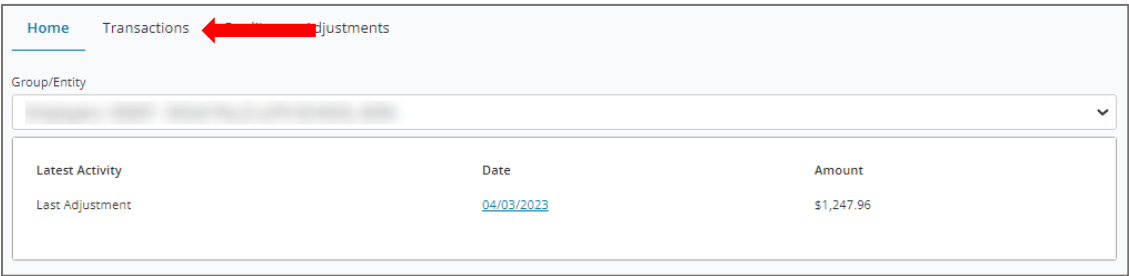
Finance

Click the Participant Summary link in the left navigation menu to return to the summary page.

The Finance card displays the member’s Billing screen.



- 1. Click the **Go to Finance** link from the Finance card to view the member’s billing data with the Latest Activity.



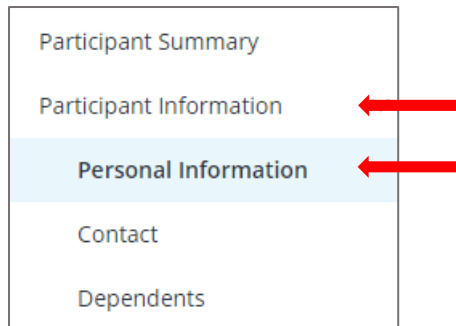
- 2. Click the **Transactions** link.
The member’s invoiced benefits display on the screen.

Search Results									
ID ↓	Group/Entity ↑	Date ↑	Transaction Type ↑	Item ↑	Coverage ↑	Billing Period ↑	Person ID ↑	Name ↑	Amount ↑
3244661		03/29/2023	Backout Payment	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis	06/01/2023 - 06/30/2023			\$215.34
3244573		03/29/2023	Backout Payment	Disability	Disability / Disability Benefit / 70% of Annual Compensation	06/01/2023 - 06/30/2023			\$55.69
3244498		03/29/2023	Backout Payment	Vision	Vision / Vision Basic Unbundled / Member Only	06/01/2023 - 06/30/2023			\$11.56
3244439		03/29/2023	Backout Payment	Dental	Dental / Dental Plus Unbundled / Member Only	06/01/2023 - 06/30/2023			\$35.68

Note: The ID number listed is a system-generated number for the specific benefit. It is not the same as the invoice number.

Participant Information

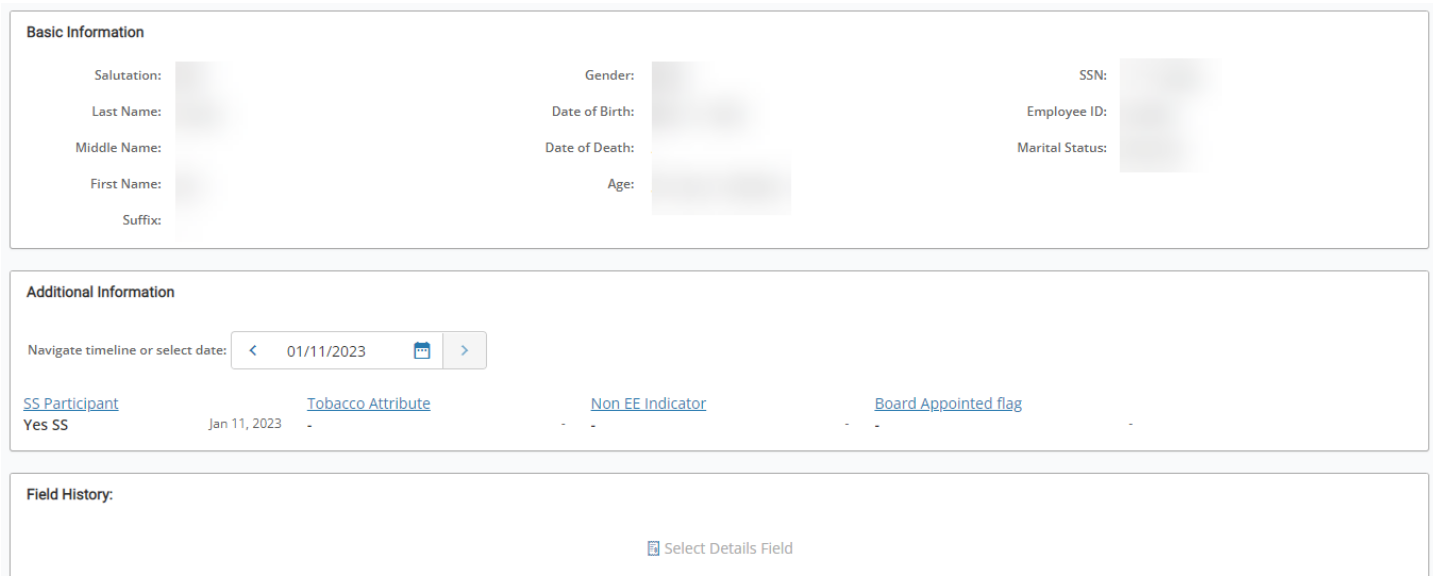
Another way to view information in the Participant Profile is to use the **Participant Information** tab on the member navigation menu. Click **Participant Information** to view the following list of subcommands.



- Participant Summary
- Participant Information
- Personal Information**
- Contact
- Dependents

1. Personal Information

This screen displays the same data as in the Profile section.



Basic Information

Salutation:		Gender:		SSN:	
Last Name:		Date of Birth:		Employee ID:	
Middle Name:		Date of Death:		Marital Status:	
First Name:		Age:			
Suffix:					

Additional Information

Navigate timeline or select date: < 01/11/2023 >

SS Participant	Tobacco Attribute	Non EE Indicator	Board Appointed flag
Yes SS	Jan 11, 2023	-	-

Field History:

Select Details Field

2. **Contact:** This screen displays the same data as with the View Summary option. It also shows you the member's preferred communication preference (email or mail.)

Communication Delivery Preferences

Delivery Type

Email

Address

Preferred	Address Type	Effective Date	Address 1	Address 2	City	State	ZIP Code	Country	Action
<input checked="" type="checkbox"/>	Home	01/13/2023		-					

3. **Dependents.**
This screen displays the data as with the Dependents option.

Name	Relationship	DOB ^	Status	Status Effective Date	Enrolled
	Spouse	09/23/1992	Eligible Dependent	01/01/2023	No

Show inactive dependents:

Dependent Information

Contact

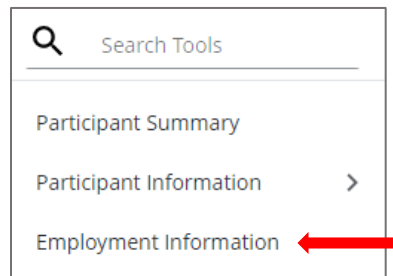
Coverage

No items to display

Employment Information

After clicking the icon in the Actions column of your participant list, you will see the member's participant profile. In the left navigation menu, you'll see a list of options of types of information you can view for that member.

Employment Information provides details about a member's employment history, employment details, and history for each field.



1. Click **Employment Information** on the member navigation menu.
The Employment History and Details screen displays.

Employment History					
Company	Company ID	Start Date	End Date	Status	
				Active	

Employment Details:					
Navigate timeline or select date: < 01/13/2023 >					
ACA Eligibility Override	Billing Department	CDSP Override	CDSP Override ER	CHP Continuous Coverage Date	
-	-	-	-	-	-
CHP EE Choice Override	CHP Grandfathered	CHP Months of Service	CHP Override	CHP Override ER	
-	-	-	-	-	-
CHP Tier Override	CRP Months of Service	CRSP Universal Avail	Date of Hire	Dis Medicare Primary Pay	
-	-	-	-	-	-
Disability - Last Day Worked Eff Date	Disability Type	Employment Status	ER Paid Extensions	Hourly/Salary Code	
-	-	Active	-	Salary	
IIP Flag	ITP Flag	Job Code	Job Title	Last ER	
-	-	E-PRSTCHR	-	-	-
Last ER Override	Leave Reason	Missionary Country	Missionary Type	Nationality	
-	-	-	-	UNITED STATES	
Pay Frequency	Roster Indicator	Supp Life Denied	Supp Life Direct Bill	TAIP Dual Coverage	
-	Lay	-	-	-	-
TAIP Eligible	TAIP ER	Tobacco Attribute	Unlimited Active Extension	Vol Benefit Override End Date	
-	-	N	-	-	-
Vol Benefit Override ER	Voluntray Benefit Override	Weekly Hours	Employment Designation	Employment Type Code	
-	-	31.00	Jan 1, 2022	-	-
Exclude Probationary Period	Annual Salary	Base Pay	Cash Housing Allowance	Utility Allowance	
-	\$29,702.00	Jan 1, 2022	\$29,702.00	Jan 1, 2022	\$0.00
					\$0.00

Employment History

The Employment History section shows the member's employment details with their employer.

Employment History					
Company	Company ID	Start Date	End Date	Status	
MEMBER COMPANY INC.	1234	01/13/2023	-	Active	

Employment Details: MEMBER COMPANY INC.

Navigate timeline or select date: < 01/13/2023 >

ACA Eligibility Override	Billing Department	CDSP Override	CDSP Override ER	CHP Continuous Coverage Date	
-	-	-	-	-	
CHP EE Choice Override	CHP Grandfathered	CHP Months of Service	CHP Override	CHP Override ER	
-	-	-	-	-	
CHP Tier Override	CRP Months of Service	CRSP Universal Avail	Date of Hire	Dis Medicare Primary Pay	
-	-	-	-	No	
Disability - Last Day Worked Eff Date	Disability Type	Employment Status	Hourly/Salary Code	IIP Flag	
-	-	Active	Salary	-	
ITP Flag	Job Title	Last ER	Last ER Override	Leave Reason	
-	E-PROFSSR	-	-	-	
Missionary Country	Missionary Type	Nationality	Pay Frequency	Roster Indicator	
-	-	UNITED STATES	Jan 13, 2023	Commissioned	
Supp Life Denied	Supp Life Direct Bill	TAIP Dual Coverage	TAIP Eligible	TAIP ER	
-	-	-	-	-	
Tobacco Attribute	Vol Benefit Override End Date	Vol Benefit Override ER	Voluntary Benefit Override	Weekly Hours	
N	-	-	-	-	Jan 1, 2023
Employment Designation	Employment Type Code	Exclude Probationary Period	Annual Salary	Base Pay	
-	-	-	-	Jan 1, 2023	Jan 1, 2023
Cash Housing Allowance	Utility Allowance	Home Provided Amount			
\$0.00	\$0.00	\$0.00			

Employment Details

The **Employment Details** section displays the status for a selected company. Fields include pay rates and scheduled hours.

To view the employment details for a specific date:

1. Click the calendar icon in the **Navigate timeline or select date** field and select the specific date.

Employment History

Company	Company ID	Start Date	End Date	Status
...	Active

Employment Details:

Navigate timeline or select date:

<

01/13/2023

>

ACA Eligibility Override

Billing Department

CDSP Override

CDSP Override ER

CHP Continuous Coverage Date

CHP EE Choice Override

CHP Grandfathered

CHP Months of Service

CHP Override

CHP Override ER

CHP Tier Override

CRP Months of Service

CRSP Universal Avail

Date of Hire

Dis Medicare Primary Pay

Disability - Last Day Worked Eff Date

Disability Type

Employment Status

Hourly/Salary Code

IIP Flag

ITP Flag

Job Title

Last ER

Last ER Override

Leave Reason

Missionary Country

Missionary Type

Nationality

Pay Frequency

Roster Indicator

Supp Life Denied

Supp Life Direct Bill

TAIP Dual Coverage

TAIP Eligible

TAIP ER

Tobacco Attribute

Vol Benefit Override End Date

Vol Benefit Override ER

Voluntray Benefit Override

Weekly Hours

Employment Designation

Employment Type Code

Exclude Probationary Period

Annual Salary

Base Pay

Cash Housing Allowance

Utility Allowance

Home Provided Amount

The **Field History** section displays historical data for the selected field in the Employment Details section.

2. Click on the name of any field in the Employment Details section to view its history details below.

Pay Frequency

Roster Indicator

Supp Life Denied

Supp Life Direct Bill

TAIP Dual Coverage

TAIP Eligible

TAIP ER

Tobacco Attribute

Unlimited Active Extension

Vol Benefit Override End Date

Vol Benefit Override ER

Voluntray Benefit Override

Weekly Hours

Employment Designation

Employment Type Code

Exclude Probationary Period

Annual Salary

Base Pay

Cash Housing Allowance

Utility Allowance

Home Provided Amount

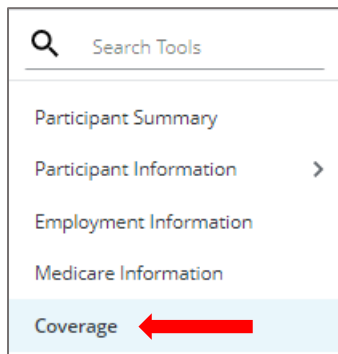
Field History: Roster Indicator

Value	Effective Date	Entry Date	Source
Lay

Coverage

The Coverage screen provides the details for a member and their dependents' benefits coverage. It displays the member's current benefits and history of benefits.

1. Select **Coverage** from the left menu.



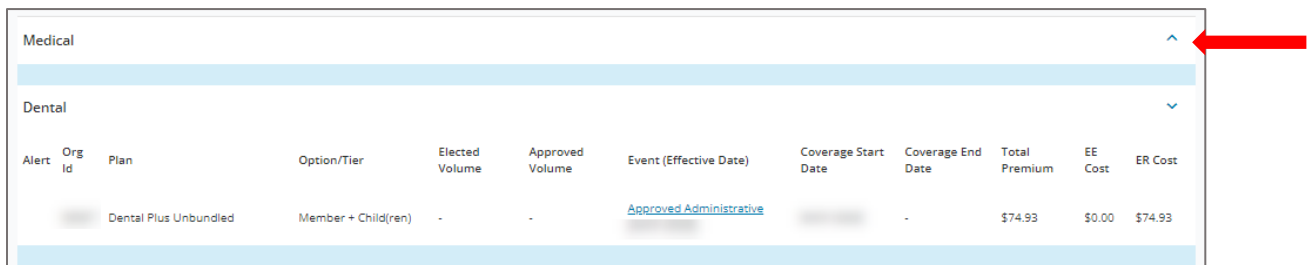
The Coverage screen organizes the member's and any dependent's coverage information under **Current** and **History** tabs. If available for the member, Medicare information displays as well.

The screenshot shows the Coverage screen with two tabs: 'Current' (selected) and 'History'. Below the tabs, it says 'Employee Set Non-Rostered' and a button 'Download Confirmation Statement'. The main content area is divided into two sections: 'Medical' and 'Dental', each with a downward arrow on the right. Each section contains a table with the following columns: Alert, Org Id, Plan, Option/Tier, Elected Volume, Approved Volume, Event (Effective Date), Coverage Start Date, Coverage End Date, Total Premium, EE Cost, and ER Cost.

Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	00933	Decline Coverage	Decline Coverage	-	-	Conversion Recalc (01/01/2023)	06/01/2022	-	\$0.00	\$0.00	\$0.00

Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	00933	Decline Coverage	Decline Coverage	-	-	Conversion Recalc (01/01/2023)	06/01/2022	-	\$0.00	\$0.00	\$0.00

2. Use the arrows at the far right of each coverage section to collapse or expand the section.



3. Click a downward pointing arrow to collapse a section and click an upward pointing arrow to expand the section.

Coverage – Current Tab

The Coverage screen defaults to the **Current** tab, which shows each benefit offered and the participant's current coverage details, including:

- **Alert** – No data will appear here; this will be populated in future updates
- **Org ID** – Your CPS Employer ID
- **Plan** – Plan Option in which the member is enrolled
- **Option/Tier** – Option for which the member is enrolled; for example: dollar amount, percentage of annual pay, etc.
- **Elected Volume** – Applicable only to life benefits; dollar value the member chose
- **Approved Volume** – Applicable only to life benefits; dollar value the member is approved for. (This will only differ from elected volume if there is a Supplemental Life election pending Evidence of Insurability).
- **Event (Effective Date)** – Displays name of benefit-impacting event and effective date of the change
- **Coverage Start Date** – Date coverage will, or did, begin
- **Coverage End Date** – Date coverage ends (if applicable)
- **Total Premium** – total of EE Cost and ER cost per benefit
- **EE Cost** – Employee cost per benefit (displayed only if ministry provided cost share to CPS)
- **ER Cost** – Employer cost per benefit
- **Totals (bottom of table)** – Total premium and costs for all benefits

To view the event history for the events entered for the coverage changes:

Health Savings Account Member											
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
		Health Savings Account Member Contribution	Participating	\$150.00	\$150.00	Enroll or Change Contributions for HSA			\$12.50	\$12.50	\$0.00

1. Click on the event name under **Event (Effective Date)**.

The Event History window opens, displaying information on the event status and coverage elected through this event.

Event History

Status

Coverage

Employee Set: nonRostered

Status	Date	User	Process	Reference
In Progress		Administrator (alice.anemployer@cps.org)	portalStartEventProc	917383
Processed		Administrator (alice.anemployer@cps.org)	portalCompleteEventProc	917446

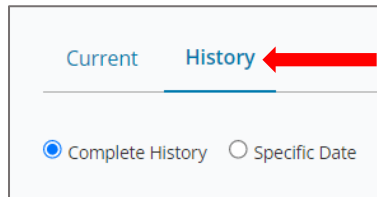
Cancel

2. Click the **Cancel** button to close the Event History window when finished viewing.

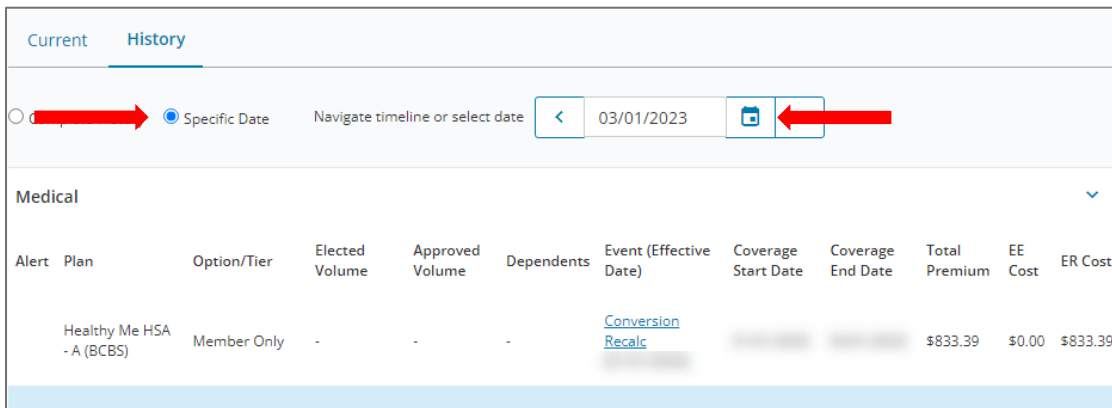
Coverage – History Tab

The History tab shows the member's previous or future coverages. View the Complete History or select a Specific Date to see coverages in effect on that date.

1. Select Complete History to view the member's entire coverage record.



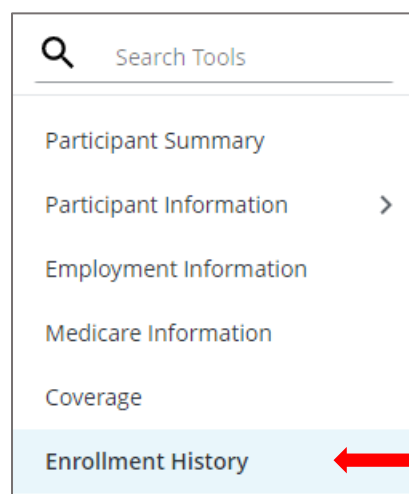
2. Click the **Specific Date** option and enter a date to view coverage as of a specific date.



Enrollment History

Enrollment History provides details on the member's events history. Events include life and employment changes, such as marriage, birth of a child or employment termination. Displayed details include event status, name of event, and effective date for the events processed on the member's record.

Begin with a Participant Search.



1. Click **Enrollment History** on the member navigation menu to view the member's previous events.

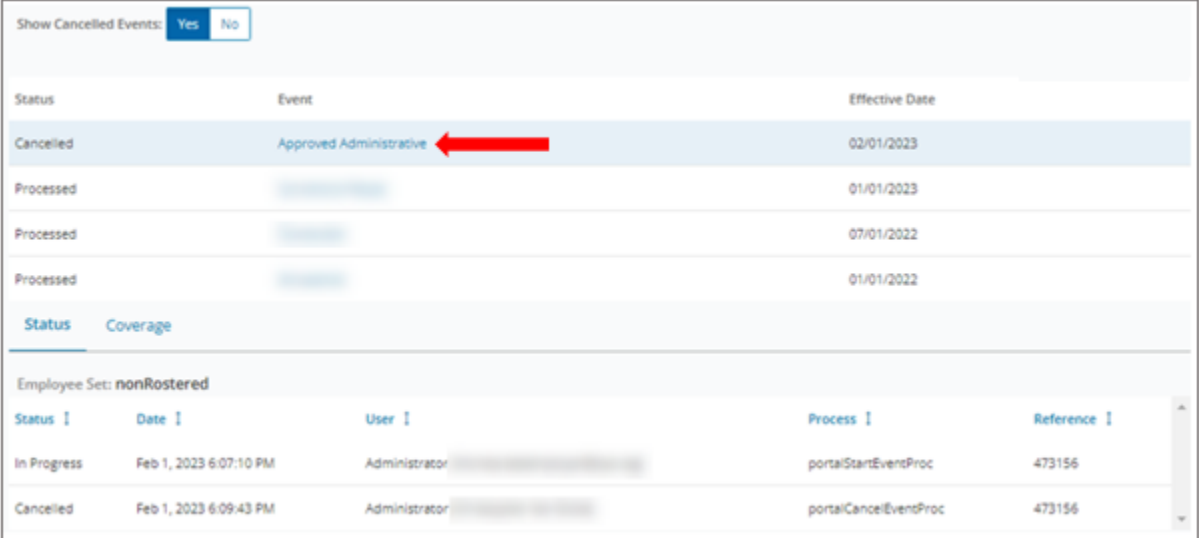
Show Cancelled Events: <input type="button" value="Yes"/> <input type="button" value="No"/>		
Status	Event	Effective Date
Processed	Enroll or Change Contributions for HSA	04/03/2023
Processed	Approved Administrative	04/01/2023
Processed	Voluntary Benefits Change	03/01/2023
Processed	Conversion Recalc	01/01/2023
Processed	Conversion	01/01/2023

The Show Cancelled Events option defaults to *No*.

- Click the **Yes** option in the **Show Cancelled Events** field to view any cancelled events.

Show Cancelled Events: <input checked="" type="button" value="Yes"/> <input type="button" value="No"/>			<input type="button" value="Create Enrollment"/>
Status	Event	Effective Date	
Cancelled	CRSP Contribution Change	02/21/2023	
Cancelled	Newly Eligible	02/21/2023	
Cancelled	Annual Enrollment	02/21/2023	
Cancelled	Birth/Adoption	02/18/2023	
Pending Approval	Birth/Adoption	02/07/2023	

Select a specific event to view the complete history of that event:



Status	Event	Effective Date
Cancelled	Approved Administrative	02/01/2023
Processed		01/01/2023
Processed		07/01/2022
Processed		01/01/2022

Employee Set: nonRostered				
Status	Date	User	Process	Reference
In Progress	Feb 1, 2023 6:07:10 PM	Administrator	portal/StartEventProc	473156
Cancelled	Feb 1, 2023 6:09:43 PM	Administrator	portal/CancelEventProc	473156

3. Click on the name of one of the listed events.

The details for the selected event display below, with available tabs to select **Status** or **Coverage**. Status is the default.

The **Status Tab** shows the complete history for the selected event with the following fields:

- **Status** – indicates the status of the event during the process from initiating the event to completion
- **Date** – the date the event was entered to apply the change
- **User** – user details for the administrator who processed these events at each stage
- **Process** – the process that was performed for the event such as Start, Complete, Continue, Reverse, Validate, Cancel etc.
- **Reference** – a process reference number for LifeWorks internal and system use

About statuses:

- A member initiates the event with the Create Enrollment function. As this step is finished, the event has an *In Progress* status.
- An event has a *Completed* status when a member has submitted any required documentation for the event.
- An event has a *Processed* status when an administrator makes the final approval.

The **Coverage** tab displays the **Calculated** or **Elected Options** for benefits that were changed for the selected event in the Enrollment History Events (top section). This tab has sections for each benefit and indicates the **Elected** and **Available** statuses for each benefit.

1. Click the **Coverage** tab.

The Calculated Options table displays below.

Status

Coverage

Calculated Options

Medical

Plan	Option	Coverage Effective	Total Premium	EE Cost	ER Cost	Status
Decline Coverage	Decline Coverage	04/03/2023	\$0.00	\$0.00	\$0.00	Available
Healthy Me HSA - A (BCBS)	Member Only	04/03/2023	\$833.39	\$0.00	\$833.39	Available
Healthy Me HSA - A (BCBS)	Member + Spouse	04/03/2023	\$1,675.11	\$0.00	\$1,675.11	Available
Healthy Me HSA - A (BCBS)	Member + Child(ren)	04/01/2023	\$1,391.76	\$0.00	\$1,391.76	Elected
Healthy Me HSA - A (BCBS)	Member + Family	04/03/2023	\$2,233.49	\$0.00	\$2,233.49	Available

Note the **check marks** indicating the **Elected** options.

Calculated options for each benefit:

- **Plan** – indicates the elected and available plan for each benefit
- **Option** – the elected and available option for each benefit
- **Coverage Effective** – the date the coverage is effective for elected and available statuses
- **Total Premium** – total cost of each benefit
- **EE Cost** – EE coverage available under plan, if the employer cost share was provided
- **ER Cost** – ER coverage available under plan
- **Status** – indicates the status of each benefit as Elected or Available
 - Elected – the plan and option have been elected for the participant
 - Available – the plan and option availability for the participant based on other employment status such as Class and Plan Group