

EMPLOYER ACCESS PROGRAM

User's Guide

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Home Tab

Getting Started

When you log into the Employer Access Program (EAP), the **Home** tab provides an overview of the current and historical retirement contributions and insurance billing, a convenient button to enroll new employees, and a view of any reports that may have recently been generated.



Global Methodist

Home | Employees | Retirement | Insurance | Document Center | Reporting | Resources | Administration | Help

Employee Search:

[Enroll New Employee](#)

Quick Links

- [GuideStone Funds Prospectus](#)
- [Retirement Contributions](#)
- [Reactivate Contributions](#)

We'd love to hear from you

We are always looking for ways to improve GuideStone Employer Access. [Tell us what you think](#)

Retirement Contributions

Current			
Global Methodist C...		\$949.00	Edit Pay
History			
7/10/2024	Global Meth...	\$949.00	View
6/30/2024	Global Meth...	\$374.00	View

[View All History](#)

Insurance Billing

Most Recent Bills			
Group Plans	3/1/2024	\$6,390.72	Pay

[View All Billing History](#)

Payment History
No insurance payment history found.

Retirement Reports

Recent Reports		
10/21/2021	Employer Activity by Source	View

[View All Report History](#)

[Run a New Report](#)

Enroll an Employee

On the **Home** tab, click the “Enroll New Employee” button.



Global Methodist

Home | Employees | Retirement | Insurance | Document Center | Reporting | Resources | Administration | Help

Employee Search:

Enroll New Employee

Quick Links

- [GuideStone Funds Prospectus](#)
- [Retirement Contributions](#)
- [Reactivate Contributions](#)

We'd love to hear from you

We are always looking for ways to improve GuideStone Employer Access.
[Tell us what you think](#)

Retirement Contributions

Current

Global Methodist C...	\$949.00	Edit	Pay
-----------------------	----------	----------------------	---------------------

History

7/10/2024	Global Meth...	\$949.00	View
6/30/2024	Global Meth...	\$374.00	View

[View All History](#)

Insurance Billing

Most Recent Bills

Group Plans	3/1/2024	\$6,390.72	Pay
-------------	----------	------------	---------------------

[View All Billing History](#)

Payment History

No insurance payment history found.

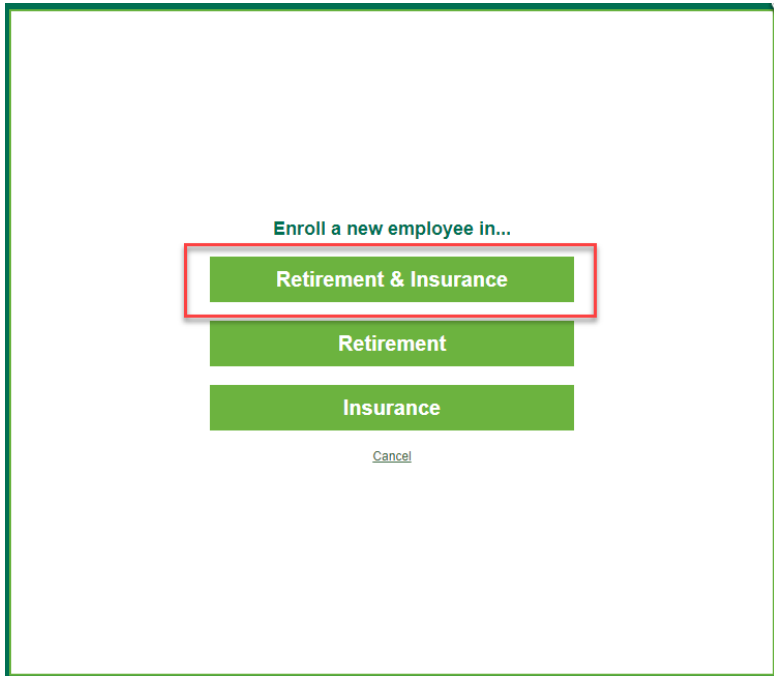
Retirement Reports

Recent Reports

10/21/2021	Employer Activity by Source	View
------------	-----------------------------	----------------------

[View All Report History](#) [Run a New Report](#)

A popup window will appear; in most cases, you will select "Retirement & Insurance"



STEP 1: Input the Employee's Social Security number and date of birth. Click "Next".

Retirement Enrollment

Please be sure to use the on-page back and next buttons to avoid risk of losing your progress.

Enter Employee's SSN:

Birth Date:

STEP 2: Input the Personal Info and click "Next".

The screenshot displays a web-based form titled "Retirement Enrollment". At the top, a dark green navigation bar contains seven steps: "1. Personal Info", "2. Spouse Info", "3. Contact Info", "4. Employment Info", "5. Fund Allocation", "6. Billing Sources", and "7. Enrollment". The "1. Personal Info" step is highlighted in a lighter green. Below the navigation bar, the "Employee Information" section is visible, containing the following fields:

- Title: (dropdown menu)
- First Name:
- Middle Initial:
- Last Name:
- Preferred First Name:
- Birth Date:
- Gender: (dropdown menu)
- Marital Status: (dropdown menu)

At the bottom of the form, there are three green buttons: "Back", "Cancel", and "Next".

STEP 3: Input the Spouse Info and click "Next".

Retirement Enrollment

1. Personal Info 2. Spouse Info 3. Contact Info 4. Employment Info 5. Fund Allocation 6. Billing Sources 7. Enrollment

Spouse Information

No Spouse SSN:

Spouse SSN:

Spouse Title: ▼

Spouse First Name:

Spouse Middle Initial:

Spouse Last Name:

Spouse Preferred First Name:

Spouse Birth Date:

Spouse Gender: ▼

If the spouse's SSN is not available, click No. The member can add it at a later time.

STEP 4: Input the employee's contact information and click "Next".

Retirement Enrollment

1. Personal Info2. Spouse Info3. Contact Info4. Employment Info5. Fund Allocation6. Billing Sources7. Enroll

Home Address

Foreign Address:

Address:

City:

State: ▼

Zip Code:

Phone Numbers

Home Number:	<input type="text"/>	Primary	<input type="radio"/>	<div style="border: 2px solid red; padding: 5px; display: inline-block;">Mobile number is preferred</div>
Work Number:	<input type="text"/>		<input type="radio"/>	
Mobile Number:	<input type="text" value="(214) 555-0000"/>		<input checked="" type="radio"/>	
Fax Number:	<input type="text"/>		<input type="radio"/>	

Email

No email address:

Email Address:

BackCancelNext

STEP 5: Input the employee's Hire Date (date employee hired with church), Plan Entry Date (1st day of current month), Salary Effective Date and Monthly Salary. Click "Next".

Retirement Enrollment

1. Personal Info 2. Spouse Info 3. Contact Info 4. Employment Info 5. Fund Allocation 6. Billing Sources 7. Enrollment

Employment

Plan: Global Methodist Clergy Plan - 1XMF41

Hire Date: 08/01/2024

Plan Entry Date: 08/01/2024

Prior Months of Service: 0

Prior Days of Service: 0

Salary Effective Date: 08/01/2024

Monthly Salary: 5000.00

Annual Salary: \$60,000.00

Back Cancel Next

Disregard the prior months of service field. They do not apply to your plan

If you have set up a retirement plan for your non-clergy staff, this dropdown will enable you to select the appropriate plan for your employee's enrollment.

STEP 6: This screen indicates the contributions will be invested into the retirement plan. This is informational only. Click "Next."

Retirement Enrollment	
1. Personal Info 2. Spouse Info 3. Contact Info 4. Employment Info 5. Fund Allocation 6. Billing Sources 7. Enrollment	
Fund Name	Allocation Percentage
Target Date Funds	
GuideStone MyDestination 2015 (GMTZX) ¹	<input type="text" value="0"/>
GuideStone MyDestination 2025 (GMWZX) ¹	<input type="text" value="0"/>
GuideStone MyDestination 2035 (GMHZX) ¹	<input type="text" value="100"/>
GuideStone MyDestination 2045 (GMFZX) ¹	<input type="text" value="0"/>
GuideStone MyDestination 2055 (GMGZX) ¹	<input type="text" value="0"/>
Target Risk Funds	
GuideStone Conservative Allocation (GFIZX)	<input type="text" value="0"/>
GuideStone Balanced Allocation (GGIZX)	<input type="text" value="0"/>
GuideStone Growth Allocation (GCOZX)	<input type="text" value="0"/>
GuideStone Aggressive Allocation (GGBZX)	<input type="text" value="0"/>
US Equity	
GuideStone Defensive Market Strategies (GDMZX)	<input type="text" value="0"/>

STEP 7: Input the employer and employee contributions and select "Show on Bill". Click "Next."

Retirement Enrollment

1. Personal Info 2. Spouse Info 3. Contact Info 4. Employment Info 5. Fund Allocation 6. Billing Sources 7. Enrollment

Contributions

Source ?	Amount (Monthly)	Show On Bill
Employee Tax Sheltered	<input type="text" value="250.00"/>	<input checked="" type="checkbox"/>
Employer	<input type="text" value="500.00"/>	<input checked="" type="checkbox"/>

Rollover

Employee and/or spouse have other retirement assets that they would like to roll over to GuideStone.

1% Club

Employee would like to join the 1% Club and receive an annual reminder to increase their contribution in (month)

You may have additional sources to add such as Employer Match.

STEP 8: Verify all the information is correct. Should you need to make any changes, select the “Back” button to update information. Click “Enroll Now” to finalize the enrollment.

**Best Practice: Print out a copy of the enrollment to keep in the employee’s HR file.*

Retirement Enrollment

1. Personal Info2. Spouse Info3. Contact Info4. Employment Info5. Fund Allocation6. Billing Sources7. Enrollment

Confirm Enrollment Information

In order for the enrollment to be complete, please retain all enrollment paperwork, i.e. application, Retirement Contribution Agreement, etc, in your files. If you agree to retain the paperwork, click the **Enroll Now** button.

Employee

SSN: XXX-XX-7441
Name: Mr. Sam Jones
Birthdate: 1/1/1970
Gender: Male
Marital Status: Married

Spouse

SSN: XXX-XX-4111
Name: Mrs. Sally Jones
Birthdate: 1/15/1970
Gender: Female

Contact

Address: 123
Dallas, TX 75201
Home Phone: (214) 555-0000

Employment

Plan: Global Methodist Clergy Plan
Hire Date: 8/1/2024
Plan Entry Date: 8/1/2024
Salary Effective Date: 8/1/2024
Monthly Salary: \$5,000.00
Annual Salary: \$60,000.00

Fund Allocation

GuideStone MyDestination 2035 (GMHZX) 100%

Contributions


Source	Amount	Show On Bill
Employee Tax Sheltered	\$250.00	Yes
Employer	\$500.00	Yes

BackCancelEnroll Now

This completes the enrollment for the retirement plan and you can click “Continue to Insurance Enrollment” to finish the enrollment process.


Retirement Enrollment

1. Personal Info 2. Spouse Info 3. Contact Info 4. Employment Info 5. Fund Allocation 6. Billing Sources 7. Enroll



Retirement Enrollment Complete!

Sam Jones
is enrolled in the
Global Methodist Clergy Plan - 1XM

 [Print enrollment summary](#)

[Continue to Insurance Enrollment](#)

Enrolling in the Health Plans

Some of the information provided in the retirement enrollment will be applied to the insurance enrollment, but there may be screens where you have repeat the information.

STEP 1: Confirm or update your employee's address. Click "Next".

Insurance Enrollment

1. Personal Info2. Contact Info3. Employment Info4. Add Dependents5. Add Products6. Enroll

Address

Address:

City*:

State*: ▼

Zip*:

Contact Details

Phone Number:

Email:

STEP 2: select the employee’s classification and input their hire date, effective date, and monthly salary. Click “Next”.

If your employee works 40 hours per week, select “GMC FT Clergy (30+ hours)”. If your employee works 30 -40 hours per week, select “GMC 75% Clergy (29 hours)”.

The screenshot shows a web-based form titled "Insurance Enrollment" with a progress bar at the top. The progress bar has six steps: 1. Personal Info, 2. Contact Info, 3. Employment Info (highlighted in green), 4. Add Dependents, 5. Add Products, and 6. Enroll. Below the progress bar, the "Employment Details" section contains the following fields:

- Classification: A dropdown menu with "GMC FT Clergy (30+ hours)" selected.
- Full-Time Hire Date: A date input field with "08/01/2024" and a calendar icon.
- Effective Date: A date input field with "08/01/2024" and a calendar icon.
- Monthly Salary: A text input field with "5000".

At the bottom of the form, there are three green buttons: "Back", "Cancel", and "Next".

STEP 3: Indicate if you need to add your employee's dependents to any of their health plan options.

The screenshot shows a web interface for "Insurance Enrollment". At the top, there is a grey header with the title "Insurance Enrollment". Below this is a dark green navigation bar with six steps: "1. Personal Info", "2. Contact Info", "3. Employment Info", "4. Add Dependents", "5. Add Products", and "6. Enroll". The "4. Add Dependents" step is highlighted with a lighter green arrow pointing to the right. The main content area is white and contains the question "Would you like to add a dependent?". At the bottom of the content area, there are four green buttons: "Back", "Cancel", "Yes", and "No". The "No" button is currently selected, indicated by a thin black border.

STEP 4: If you selected “Yes”, you will be directed to this page to add your dependents. You will add each dependent one at a time. Once you are finished, you can click “Done with Dependents” to proceed.

Insurance Enrollment

1. Personal Info2. Contact Info3. Employment Info4. Add Dependents5. Add Products6. Enroll

Dependent Details

To add a dependent for the employee, enter the required fields below and click the "Done With Dependents" button.

First Name*:

Middle Initial:

Last Name*:

SSN*:

This is a newborn and SSN is unknown.

Birth Date*:

Relationship*: Son Daughter

Requests for coverage are subject to plan guidelines and may require underwriting.
Not all plans constitute "credible coverage" for Massachusetts residents.

Add Another Dependent

BackCancelDone With Dependents

STEP 5: This next screen will display all of the health and life products available to your employees. Select the plan(s) they are interested in. Click "Next".

If your clergy employee works 30 hour or more per week, then medical coverage is required. However, if they have coverage elsewhere such as on their spouse's health plan, Medicare, retired military, etc, they can waive the coverage by selecting the "Decline Coverage" checkbox. You will be contacted by the Global Methodist home office at a later time to complete a waiver form.

Insurance Enrollment

1. Personal Info 2. Contact Info 3. Employment Info 4. Add Dependents **5. Add Products** 6. Enroll

Add Product Details

Medical Decline Coverage

Health Choice 1000

Please select a medical product or decline coverage.

Dental

Premier Dental Care Plan

NONE

Please select a dental product or NONE.

Life

Employee Term Life

Accident

Accidental Death and Dismemberment (AD&D)

Disability

Premier Long-Term Disability

Back **Cancel** **Next**

STEP 6: Indicate if any of the dependents are to be covered for the displayed product(s).

Insurance Enrollment

1. Personal Info 2. Contact Info 3. Employment Info 4. Add Dependents **5. Add Products** 6. Enroll

Health Choice 1000

Employee Effective Date*: 08/01/2024

Product Effective Date: 08/01/2024

Please select the people to add to this product:

Select	Name
<input type="checkbox"/>	Sam Jones (Employee)
<input checked="" type="checkbox"/>	Susie Jones

Provide this [required notice](#) about certain benefits to your employee.

Back **Cancel** **Next**


If the dependent needs to be covered under the plan, select the box


If you have additional products, please insert the requested information. Click "Next".

Insurance Enrollment

1. Personal Info2. Contact Info3. Employment Info4. Add Dependents5. Add Products6. Enroll

Employee Term Life

Employee Effective Date*: 

Product Effective Date: 

BackCancelNext

STEP 7: Review and confirm the enrollment information is correct, then click “Submit”.

Insurance Enrollment

1. Personal Info2. Contact Info3. Employment Info4. Add Dependents5. Add Products6. Enroll

You have chosen the following list of actions. These actions will not be processed until you press the Submit button.

Transaction	Person	Product	Volume	Effective Date	
Add Employee	Sam Jones	N/A	N/A	08/01/2024	✖
Add Dependent	Sally Jones	N/A	N/A	08/01/2024	✖
Add Product	Sam Jones	Health Choice 1000	N/A	08/01/2024	✖
Add Product	Sally Jones	Health Choice 1000	N/A	08/01/2024	✖
Add Product	Sam Jones	Employee Term Life	\$50,000.00	08/01/2024	✖
Add Product	Sam Jones	Accidental Death and Dismemberment (AD&D)	\$50,000.00	08/01/2024	✖
Add Product	Sam Jones	Premier Long-Term Disability	N/A	08/01/2024	✖

Add Another Dependent

Add Another Product

Back


Cancel

Submit

You are currently adding a new employee. Please do not submit your transactions until you have completed all desired changes. After submitting, you will not be able to make any further changes to this employee.

You have completed your employee's enrollment into the health and life plans.


Insurance Enrollment



Insurance Enrollment Received!

We have received your enrollment request for
Sam Jones

Please Note: Enrollments are usually processed within 5 business days. Insurance products are billed one month in advance, so this enrollment may not be reflected on your next bill.

 [Print enrollment summary](#)

[What is one way we can improve the enrollment process?](#)

Employees Tab

View/Update Employee Information

STEP 1: On the **Employees** tab, click on the employee's name.

GuideStone Employer Access Global Methodist

Home Employees Retirement Insurance Document Center Reporting Resources Administration Help

Employee Search: Enter Name or SSN | [View All Employees](#)

[Enroll New Employee](#)

Employees

Retirement

[Update Contributions](#)
[Reactivate Contributions](#)
[New Enrollment or Rehire](#)

Name or SSN: OR Last Name Starts With: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#)
[N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Include Employees Who Have: Insurance Retirement Both Either

Include Employees Who Are: Active Inactive, Suspended or Non-Participating Either

✓ = Active ✓ = Inactive ✓ = Retirement: Suspended or Non-Participating

Name	SSN	Insurance	Retirement
Brown, Ben	XXX-XX-6944		✓
Brown, Ben	XXX-XX-7946		✓
Doe, John	XXX-XX-1357		✓
Garcia, Jonathan	XXX-XX-8741		✓
Johnson, James	XXX-XX-9510		✓
Jones, Sam	XXX-XX-7441	✓	✓
Lewis, Elsa	XXX-XX-4968	✓	✓
Lewis, Linda	XXX-XX-8888	✓	✓
Paul, Saint	XXX-XX-7779	✓	✓
Reed, Lucy	XXX-XX-7877	✓	✓

Click the employee to view their details

STEP 2: Update the employee's information by clicking on the appropriate "Edit" button.

Saint P. Paul XXX-XX-7779

[Terminate Employee](#)

[Products](#) | [Employee Detail](#)

EMPLOYEE INFORMATION

TITLE
Mr.

NAME
Saint P. Paul

SSN
XXX-XX-7779

BIRTH DATE
8/19/1974

GENDER
Male

MARITAL STATUS
Single

[Edit](#)

SPOUSE

There is no spouse on file for this person.

If this information is incorrect, please contact GuideStone at **1-888-98-GUIDE** (1-888-984-8433) since proper documentation is required.

Please call GuideStone to add or remove spouse information.

CONTACT INFORMATION

ADDRESS
5005 Lbj Freeway
Dallas TX 75244

HOME PHONE
(214) 555-1214

WORK PHONE
None

MOBILE PHONE
(123) 456-7890

FAX
None

EMAIL
ISAWTHELIGHT@BIBLE.COM

[Edit](#)

Click here to update insurance and/or retirement salary information

SALARY

Insurance

LAST SALARY EFFECTIVE DATE
1/1/2024

LAST REPORTED SALARY (MONTHLY)
\$3,500

LAST REPORTED SALARY (ANNUAL)
\$42,000

Insurance salary is used to determine coverage amount of disability and life insurance products.

Retirement

There is no retirement salary information on file for this employee.

Retirement salary information supports plan analysis and helps evaluate employee retirement readiness.

[Edit](#)

When you update the salary information, the salary amount may vary depending on if the clergy has housing allowance. The insurance amount is typically the W2 amount, however the retirement amount will have their base salary plus housing allowance. Click "Save".

Edit Salary Information

Insurance

New Salary Effective Date:

01/01/2024



Monthly Salary: Enter a whole number greater than zero

3500

Annual Salary:

\$42,000

Insurance salary is used to determine coverage amounts for disability and life insurance products.

Retirement

New Salary Effective Date:



Monthly Salary: Enter the participant's monthly salary

Annual Salary:

Retirement salary will include the housing allowance amount

Retirement salary information supports plan analysis and helps evaluate employee retirement readiness.

Cancel

Save

Employee's Account History

STEP 1: On the **Employees** tab, click on the employee's name.

Home **Employees** Retirement | Document Center | Reporting | Resources | Administration | Educational Content | Help

Employee Search: | [View All Employees](#)

Enroll New Employee

Retirement

[Update Contributions](#)
[Reactivate Contributions](#)
[New Enrollment or Rehire](#)

Employees

Name or SSN: Last Name Starts With: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Search By:

Include Employees Who Are: Active Inactive, Suspended or Non-Participating Either

✓ = Active ✓ = Inactive

Name	SSN	Retirement
Doe, John	XXX-XX-5631	✓

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STEP 2: Click the **Activity History** link to view the employee's transaction history.

Home | Employees | Retirement | Insurance | Document Center | Reporting | Resources | Administration | Help

Employee Search: | [View All Employees](#)

Saint P. Paul XXX-XX-7779 [Terminate Employee](#)

Products | **Employee Detail**

RETIREMENT

[Activity History](#) | [Account Summary](#) | [Information Sharing](#)

Global Methodist Clergy Plan
Active

Employee Tax Sheltered	\$1.00	Total Balance <small>as of 7/31/2024</small> \$9,286.31 <small>Vested Balance: \$9,286.31</small>
Employer	\$1.00	
Total Monthly Contributions:	\$2.00	
Edit	Suspend	Terminate

GROUP PLANS INSURANCE

[Activity History](#) | [View Products](#) | [Add Dependent](#) | [Add Product](#) | [Terminate Employee](#) | [Terminate Dependent](#) | [Terminate Product](#)

Premier Dental Care Plan

Effective Date	Coverage Option
3/1/2024	Employee Only

Employee Term Life

Effective Date	Volume
3/1/2024	\$168,000.00

Health Choice 1000

Effective Date	Coverage Option
3/1/2024	Employee Only

Premier Long-Term Disability

Effective Date	Volume
----------------	--------

Click the links to view Activity History or Account Summary



STEP 3: You will see all current transactions. To filter further, change the Date Range, Transaction Type or Source. Then click the “Refresh View” button.



Global Methodist

Home | Employees | Retirement | Insurance | Document Center | Reporting | Resources | Administration | Help

Employee Search: | [View All Employees](#)

Employee: **Paul, Saint P.** SSN: **XXX-XX-7779** [View Employee Detail](#)

Retirement

- [Update Contributions](#)
- [Terminate Employee](#)
- [Activity History](#)
- [Account Summary](#)
- [Information Sharing](#)

Group Plans Insurance

- [Activity History](#)
- [View Products](#)
- [Add Dependent](#)
- [Add Product](#)
- [Terminate Employee](#)
- [Terminate Dependent](#)
- [Terminate Product](#)

Activity History

Account type

403(b)

Date range

Year to date (1/1/2024 - 7/31/2024)

Plan

Global Methodist Clergy Plan

Additional filters

Transaction types: All

- All
- Contributions Reinvest Capital Gains Reinvest Dividends

Funds: All

- All
- GuideStone Defensive Market Strategies (GDMZX) GuideStone Growth Equity (GGEZX)

Sources: All

- All
- Employee Roth Employer

You can adjust various filters and then click refresh to update the view

1/1/2024 - 7/31/2024

Date	Transaction	Fund	Source	Shares	Dollars
6/21/2024	Reinvest Dividends	GuideStone Defensive Market Strategies (GDMZX)	Employee Roth	1.0781	\$12.98
6/21/2024	Reinvest Capital Gains	GuideStone Growth Equity (GGEZX)	Employee Roth	0.0292	\$0.80
6/21/2024	Reinvest Capital Gains	GuideStone Growth Equity (GGEZX)	Employee Roth	0.2925	\$8.01
6/21/2024	Reinvest Dividends	GuideStone Defensive Market Strategies (GDMZX)	Employer	4.4327	\$53.37

Terminate an Employee

STEP 1: On the **Employees** tab, click on the employee's name.

Home **Employees** Retirement Document Center Reporting Resources Administration Educational Content Help

Employee Search: Enter Name or SSN | View All Employees

Enroll New Employee

Retirement

[Update Contributions](#)
[Reactivate Contributions](#)
[New Enrollment or Rehire](#)

Employees

Name or SSN: ? OR Last Name Starts With: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Search By: Search

Include Employees Who Are: Active Inactive, Suspended or Non-Participating Either

Reset

✓ = Active ✓ = Inactive

Name	SSN	Retirement
Doe, John	XXX-XX-5631	✓

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STEP 2: Click the "Terminate Employee" button.

GuideStone® Employer Access Global Methodist

Home **Employees** Retirement Insurance Document Center Reporting Resources Administration Help

Employee Search: Enter Name or SSN | View All Employees

Saint P. Paul XXX-XX-7779 **Terminate Employee**

Products Employee Detail

RETIREMENT

[Activity History](#) [Account Summary](#) [Information Sharing](#)

403(b)
Global Methodist Clergy Plan - 1XMF41
Active

Employee Tax Sheltered	\$1.00	Total Balance as of 7/31/2024 \$9,286.31 Vested Balance: \$9,286.31
Employer	\$1.00	
Total Monthly Contributions:	\$2.00	

[Edit](#) [Suspend](#) [Terminate](#)

GROUP PLANS INSURANCE

[Activity History](#) Premier Dental Care Plan

STEP 3: Indicate which products they are terminating. Click "Terminate Products".

Please indicate the plans and products to terminate:

RETIREMENT

- Global Methodist Clergy Plan - 1XMF41

GROUP PLANS INSURANCE

- Premier Dental Care Plan
- Employee Term Life
- Health Choice 1000
- Premier Long-Term Disability

Cancel

Terminate Products

STEP 4: Input the employee's Termination Date for the Retirement Plan (date employee severed service with the employer) and the Plan End Date (the date of the last contributions the employer will send in on behalf of the employee). Select the Termination Reason, then click the "Save" button.


Retirement Termination


Plan: Global Methodist Clergy Plan

Hire Date: 8/2/2018

Alternate Vesting Date: 8/2/2018

Prior Months of Service: 0

Termination Date: 

Plan End Date: 

Termination Reason:

- Termination
- Retirement
- Disability
- Death

Is Employee terminating employment or transferring to another satellite? Terminating Employment Transferring to another Satellite

Example: An employee terminates employment with the church on 1/19/xx. However, the date of the employee's last contribution will be remitted for the pay period ending 1/31/xx. Therefore, the employee's Termination Date will equal 1/19/xx and their Plan End Date will equal 1/31/xx.

Once you complete the retirement termination, click "Continue Terminating Employee"

Retirement Termination

The termination was completed successfully.


[Continue Terminating Employee](#)


STEP 5: Input the employee's Termination Date for the Insurance Plan and select the Termination Reason, then click the "Next".

Group Plans Termination

To terminate the selected employee, choose a termination date and termination reason and click the "Next" button.

Termination Details

Termination Date: 

Termination Reason: 

[Cancel](#) [Next](#)

Confirm the information and click "Save".

Group Plans Termination

Are you sure you want to terminate this employee?

Termination Details

Date: 07/31/2024

Reason: Left Employment

The following products will be terminated:

- BlueHPN 3000

Back

Cancel

Save

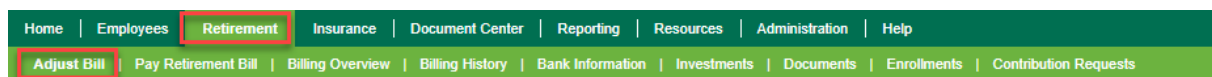
Retirement Tab

Edit Contribution Amounts

STEP 1: On the **Retirement** tab, click into the amount field under “Recurring Contribution” column change the contribution amount.

If the change in contribution is due to a change in the employee’s salary, you can update the salary by accessing the employee on the **Employees** tab.

STEP 2: When all changes have been made, click “Save”.



Adjust Bill

The Adjust Bill screen is used to update recurring contributions and make one-time adjustments.

When should I remit my contributions?

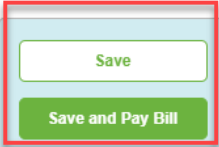
*Payment is due by the 20th of the month following withholding. IRS regulations should be applied to a participant's account within 15 business days after the end of the month.

If you set up a retirement plan for your non-clergy staff, there will be a dropdown to select the appropriate plan you want to work with and pay.
Note: You will need to pay your clergy and non-clergy retirement plans separately.

Global Methodist Clergy Plan

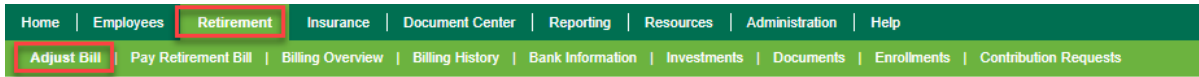
Create Prior Pay Period Payment

16 Active Employees	Source ?	Recurring Contribution	One-Time Adjustment	Current Bill Total	Skip ?
Brown, Ben XXX-XX-6944 Suspend contributions Terminate employee	Employer	<input type="text" value="350.00"/>	<input type="text" value="0.00"/>	= 350.00	<input type="checkbox"/>
	Add/Remove Source				
	Subtotal	\$350.00	\$0.00	\$350.00	
Doe, John XXX-XX-1357 Suspend contributions Terminate employee	Employee Tax Sheltered	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal		\$2.00	\$0.00	\$2.00	
Garcia, Jonathan XXX-XX-8741 Suspend contributions	Employee Tax Sheltered	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal		\$2.00	\$0.00	\$2.00	
Hide subtotals v					
		Recurring	One-Time	Subtotals	
Employee Contributions		\$761.00	\$0.00	\$761.00	
Employer Contributions		\$1,686.00	\$0.00	\$1,686.00	
Totals		\$2,447.00	\$0.00	\$2,447.00	



Add or Remove a Contribution Source

STEP 1: On the **Retirement** tab, click "Add/Remove Source" for the employee you need to change.



Adjust Bill

The Adjust Bill screen is used to update recurring contributions and make one-time adjustments to the current bill. [?](#)

When should I remit my contributions?

*Payment is due by the 20th of the month following withholding. IRS regulations provide that elective deferrals (i.e. tax-sheltered employee contributions) should be applied to a participant's account within 15 business days after the month in which the deferral is withheld.

Global Methodist Clergy Plan

Monthly - Last payment received on 7/10/2024

[Print](#)

[Create Prior Pay Period Payment](#)

16 Active Employees	Source ?	Recurring Contribution	One-Time Adjustment	Current Bill Total	Skip ?
Brown, Ben XXX-XX-6944 Suspend contributions Terminate employee	Employer	<input type="text" value="350.00"/>	+ <input type="text" value="0.00"/>	= 350.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal		\$350.00	\$0.00	\$350.00	
Doe, John XXX-XX-1357 Suspend contributions Terminate employee	Employee Tax Sheltered	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal		\$2.00	\$0.00	\$2.00	
Garcia, Jonathan XXX-XX-8741 Suspend contributions	Employee Tax Sheltered	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
Hide subtotals v					
	Recurring		One-Time	Subtotals	
	Employee Contributions	\$761.00	\$0.00	\$761.00	
	Employer Contributions	\$1,686.00	\$0.00	\$1,686.00	
	Totals	\$2,447.00	\$0.00	\$2,447.00	

Save

Save and Pay Bill

STEP 2: Update the “Recurring Contribution” field that corresponds to the correct source and add or remove the contribution amount. Click on the “Save and Exit” button.



[Print this page](#)

Update Employee Contributions

► [When should I remit my contributions?](#)

Employee Name: Ben Brown
SSN: XXX-XX-6944
Plan: Global Methodist Clergy Plan
Last Payment Received: 7/10/2024
Billing Frequency: Monthly

You have the option to change a recurring contribution and/or make a one-time contribution

Suspend contributions as of:  

Source ?	Recurring Contribution ?	One-Time Adjustment ?	Current Bill Total
<u>Employee Tax Sheltered</u>	0.00 +	0.00 =	0.00
<u>Employer</u>	350.00 +	0.00 =	350.00
Total:	\$350.00	\$0.00	\$350.00

Setup Bank Information and Payment Options

STEP 1: If the church's banking details were not added by GuideStone when your plan was set up, the EAP administrator will need to establish ACH information so that contributions can be remitted electronically. To add the church's bank details, go to the **Retirement** tab and **Bank Information** subtab.

STEP 2: Enter the church's Routing and Account information.

**Note: banking information cannot be entered for a specific employee. The routing and account number must belong to the church.*

STEP 3: Select the desired Draft Frequency:

"Fixed Day of Month" are automatic, reoccurring monthly payments. If this option is selected, the EAP administrator must select a draft date in which the payment will be triggered each month.

"On Request" payments give the employer the flexible option to make the contribution payments to GuideStone upon their choosing. This option does not require a specified Draft Date since contributions can be remitted at different times each month.

STEP 4: Click "Save".

STEP 5: (Optional) If changes ever need to be made regarding banking information, or a change from one payment style to another, click the "Edit" button and make the change, then click "Save."

The screenshot displays the 'Set up online retirement payments' interface. The navigation bar includes 'Home', 'Employees', 'Retirement', 'Insurance', 'Document Center', 'Reporting', 'Resources', 'Administration', and 'Help'. The sub-navigation bar includes 'Adjust Bill', 'Pay Retirement Bill', 'Billing Overview', 'Billing History', 'Bank Information', 'Investments', 'Documents', 'Enrollments', and 'Contribution Requests'. The main content area is titled 'Set up online retirement payments' and contains the following form fields:

- Enroll in GuideStone's paperless billing option. You will receive email reminders when payments are due.
- Routing Number: [Text Input]
- Account Number: [Text Input]
- Re-enter Account Number: [Text Input]
- Account Type: Checking, Savings
- Draft Frequency: [Dropdown Menu: Fixed Day of Month, Fixed Day of Month, On Request Only]
- Draft Date: [Text Input]

A green 'Save' button is located at the bottom of the form. A callout box titled 'ACH Payment Options' provides details for the selected 'Fixed Day of Month' option:

- Fixed Day of Month** - Never miss a payment with our automatic fixed day payment option. Your payments are automatically deducted from your bank account on the day of the month you select.
- On Request Only** - Maintain flexible control over your payment date with on request payments. You choose when to remit payments.

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Make a Fixed Day Contribution Payment

Fixed Day ACH: Contributions for Fixed Day payments will automatically pay on the plan's designated draft day. EAP will provide a draft reminder on the top of the "Contribution Maintenance" screen. The EAP administrator will receive an auto-generated email confirmation once the payment has drafted.

Home | Employees | **Retirement** | Document Center | Reporting | Resources | Administration | Educational Content | Help

Update Contributions | Pay Retirement Bill | Contribution History | Bank Information | Investments | Documents

[Print this page](#)

Contribution Maintenance

The Contribution Maintenance screen is used to update recurring contributions. If needing to make a one-time contribution amount, please contact GuideStone on our toll-free number at 1-888-98-GUIDE (1-888-984-8433). ?

Your bill payment method is ACH on a fixed period. Please make all contribution changes prior to 4:00 p.m. CST on the last business day before Wednesday, June 3.

Plan: Church Name - Plan
Last Payment Received: 5/4/2020
Billing Frequency: Monthly
Employee Contributions: \$0.00
Employer Contributions: \$624.36

Total Recurring Contributions: **\$624.36**

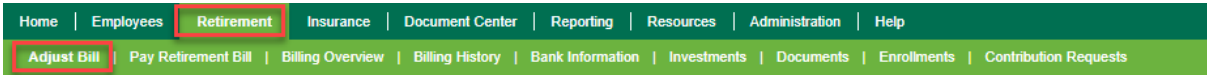
Fixed Day contributions show the next payment date here

Make an On Request Contribution Payment

Contributions for "On Request" payments will need to be *initiated* when the church is ready to make a payment.

STEP 1: On the **Retirement** tab, verify all contribution amounts are correct. If amounts are not correct, make the needed changes and then click the "Save" button. When the total is correct click "Pay Bill".

Note: if the contribution amount changes because there was a change in salary, don't forget to update the Salary information in the Employee Detail section.



Adjust Bill

The Adjust Bill screen is used to update recurring contributions and make one-time adjustments to the current bill.

When should I remit my contributions?

*Payment is due by the 20th of the month following withholding. IRS regulations provide that elective deferrals (i.e. tax-sheltered employee contributions) should be applied to a participant's account within 15 business days after the month in which the deferral is withheld.

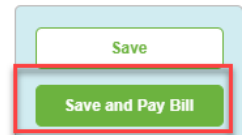
Global Methodist Clergy Plan

Monthly - Last payment received on 7/10/2024

Print

[Create Prior Pay Period Payment](#)

16 Active Employees	Source	Recurring Contribution	One-Time Adjustment	Current Bill Total	Skip
Brown, Ben XXX-XX-6944 Suspend contributions Terminate employee	Employer	<input type="text" value="350.00"/>	+ <input type="text" value="0.00"/>	= 350.00	<input type="checkbox"/>
	Add/Remove Source				
	Subtotal	\$350.00	\$0.00	\$350.00	
Doe, John XXX-XX-1357 Suspend contributions Terminate employee	Employee Tax Sheltered	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal	\$2.00	\$0.00	\$2.00		
Garcia, Jonathan XXX-XX-8741 Suspend contributions	Employee Tax Sheltered	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal	\$2.00	\$0.00	\$2.00		
Hide subtotals					
	Employee Contributions	\$761.00	\$0.00	\$761.00	
	Employer Contributions	\$1,686.00	\$0.00	\$1,686.00	
	Totals	\$2,447.00	\$0.00	\$2,447.00	



STEP 2: Input the payroll period date for the contributions. For employers remitting monthly payments, there will be a dropdown list to select from.

Home | Employees | Retirement | Insurance | Document Center | Reporting | Resources | Administration | Help

Adjust Bill | Pay Retirement Bill | Billing Overview | Billing History | Bank Information | Investments | Documents | Enrollments | Contribution Requests

Enroll New Employee

Retirement

[Update Contributions](#)
[Reactivate Contributions](#)
[New Enrollment or Rehire](#)

Insurance

[Update Salaries](#)

Group Plans Insurance

[Add Employee](#)

Pay Retirement Bill

*Payment is due by the 20th of the month following withholding. IRS regulations provide that elective deferrals (i.e. tax-sheltered employee contributions) should be applied to a participant's account within 15 business days after the month in which the deferral is withheld.

Enter a pay date to pay the current retirement contribution bill. Click the Edit link next to the Bill Amount to make changes to the current retirement bill.

Plan:	Global Methodist Clergy Plan
Billing Frequency:	Monthly
Account:	Bank Of America, NA
Method:	Checking
Account Number:	XXXXXX8444
Employee Contributions:	\$761.00
Employer Contributions:	\$1,686.00
Current Bill Total:	\$2,447.00
Bill Amount:	\$2,447.00 Edit
Contributions for Pay Period Ending: (Pay Period/Pay Check Date)	<input type="text"/>
Last Payment Received:	7/10/2024

[Next](#)

Verify the amount and insert the pay period end date

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STEP 3: To finalize the payment, select the “Pay Bill” button. A payment confirmation window will appear that can be printed for the church’s records.

The screenshot displays a web application interface for paying a retirement bill. At the top, there is a navigation bar with links for Home, Employees, Retirement, Insurance, Document Center, Reporting, Resources, Administration, and Help. Below this is a secondary navigation bar with links for Adjust Bill, Pay Retirement Bill, Billing Overview, Billing History, Bank Information, Investments, Documents, Enrollments, and Contribution Requests. The main content area is titled 'Pay Retirement Bill' and contains a 'Confirm Payment Information' section. This section lists the following details:

Plan:	Global Methodist Clergy Plan - 1XMF41
Billing Frequency:	Monthly
Account:	Bank Of America, NA
Method:	Checking
Account Number:	XXXXXX8444
Contributions for Pay Period Ending: (Pay Period/Pay Check Date)	7/31/2024
Employee Contributions:	\$761.00
Employer Contributions:	\$1,686.00
Current Bill Amount:	\$2,447.00
Prior Contributions:	\$0.00
Amount Drafted:	\$2,447.00

At the bottom of the confirmation section, there are two buttons: 'Back' and 'Pay Bill'. The 'Pay Bill' button is highlighted with a red rectangular box. On the left side of the page, there are three menu sections: 'Enroll New Employee', 'Retirement' (with links for Update Contributions, Reactivate Contributions, and New Enrollment or Rehire), 'Insurance' (with a link for Update Salaries), and 'Group Plans Insurance' (with a link for Add Employee). The footer of the page contains the copyright notice '© Copyright 1997 - 2024, GuideStone. All Rights Reserved.' and links for Corporate Home, Privacy Policy, Security, and Contact Us.

Remit a Missed Payment or Make a One-time Contribution

Fixed Day Payments:

Contact Customer Solutions at 1-888-984-8433 to request a manual draft to be processed for the missing pay period(s) or a one-time contribution. You will need to provide the name of the employee(s), the contribution pay-period(s), the contribution source(s) and the contribution dollar amount(s).

On Request Missing Payments:

Option 1: If you discovered you missed a contribution for your employees for a prior pay period, simply edit the **Adjust Bill** screen with the necessary information. Then select "Save and Pay Bill". Enter the designated pay period and select "Next". From the "Confirmation Payment" screen select "Pay Bill".

*Note: If you get an error message that month's bill has already been paid, then move to the next section in this manual regarding "one-time catchup" payments.

Option 2: To process a "One-Time Catch-up" payment, you will need to create a *Prior Pay Period Payment*.

The catch-up payments must be remitted in conjunction with a regularly scheduled payment. They cannot stand alone. If this does not work for you, contact Customer Solutions at 1-888-984-8433 to request a one-time contribution.

STEP 1: Select "Create a Prior Pay Period Payment".

Adjust Bill

The Adjust Bill screen is used to update recurring contributions and make one-time adjustments to the current bill. ?

When should I remit my contributions?
 *Payment is due by the 20th of the month following withholding. IRS regulations provide that elective deferrals (i.e. tax-sheltered employee contributions) should be applied to a participant's account within 15 business days after the month in which the deferral is withheld.

Global Methodist Clergy Plan Monthly - Last payment received on 7/10/2024 Print

[Create Prior Pay Period Payment](#)

16 Active Employees	Source ?	Recurring Contribution	One-Time Adjustment	Current Bill Total	Skip ?
Brown, Ben XXX-XX-6944 Suspend contributions Terminate employee	Employer	<input type="text" value="350.00"/>	+ <input type="text" value="0.00"/>	= 350.00	<input type="checkbox"/>
	Subtotal	\$350.00	\$0.00	\$350.00	
	Doe, John XXX-XX-1357 Suspend contributions Terminate employee	Employee Tax Sheltered	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00
Employer		<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
Subtotal		\$2.00	\$0.00	\$2.00	
Garcia, Jonathan XXX-XX-8741 Suspend contributions	Employee Tax Sheltered	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Employer	<input type="text" value="1.00"/>	+ <input type="text" value="0.00"/>	= 1.00	<input type="checkbox"/>
	Subtotal	\$2.00	\$0.00	\$2.00	
Hide subtotals ▼					
	Employee Contributions	\$761.00	\$0.00	\$761.00	
	Employer Contributions	\$1,686.00	\$0.00	\$1,686.00	
	Totals	\$2,447.00	\$0.00	\$2,447.00	

STEP 2: Input the appropriate Prior Paycheck Date and then select the appropriate employees from the list.

Prior Bill Payment

The Prior Bill Payment screen is used to pay selected employees a contribution for a prior paycheck. Begin the processing by entering the date of the prior pay period in the Prior Paycheck Date field. Next, select the employees to receive a prior pay period payment by placing a check in the checkbox next to the employee's name. Once all desired employees have been selected, click the Next button. The screen following this one will allow payments for each employee to be entered for each of the selected employees. Once all payment information is entered, click the Save button to save the prior payment billing information.

Plan: Global Methodist Clergy Plan
Last Payments Received: 7/10/2024
Prior Paycheck Date: 06/30/2024

Select	SSN	Name
<input checked="" type="checkbox"/>	XXX-XX-6944	Brown, Ben
<input type="checkbox"/>	XXX-XX-1357	Doe, John
<input type="checkbox"/>	XXX-XX-8741	Garcia, Jonathan
<input type="checkbox"/>	XXX-XX-7441	Jones, Sam
<input checked="" type="checkbox"/>	XXX-XX-8888	Lewis, Linda
<input type="checkbox"/>	XXX-XX-7779	Paul, Saint
<input type="checkbox"/>	XXX-XX-5366	Wesley, John

Next

Enter the paycheck date and select the applicable members

STEP 3: Input the contribution amount into the correct source field, then click "Finish".

Prior Bill Payment

Enter amounts in the Payment column for payments that should appear on the prior paycheck bill. After all amounts have been entered, click the Finish button to save your changes. Once the save has completed, the totals for the prior paycheck will appear on the Contribution Maintenance screen. For help in determining which Source to choose, click the question mark next to the Source column header.

*Payment is due by the 20th of the month following withholding. IRS regulations provide that elective deferrals (i.e. tax-sheltered employee contributions) should be applied to a participant's account within 15 business days after the month in which the deferral is withheld.

Plan: Global Methodist Clergy Plan - 1XMF41
Prior Payment Date: 6/30/2024

Payment Due: \$550.00

	Source ?	Payment Total	Recurring Contribution
Employee: Brown, Ben SSN: XXX-XX-6944 Remove	Employee Tax Sheltered	<input type="text" value="0.00"/>	0.00
	Employer	<input type="text" value="250.00"/>	350.00
	Subtotal:	\$250.00	
Employee: Lewis, Linda SSN: XXX-XX-8888 Remove	Employee Tax Sheltered	<input type="text" value="0.00"/>	1.00
	Employer	<input type="text" value="300.00"/>	1.00
	Subtotal:	\$300.00	
Total:		\$550.00	

Enter the dollar amount by the appropriate sources

[Back](#) [Finish](#)

STEP 4: The Prior Paycheck Payment that was just created will populate in a yellow box near the top of the page. When you are ready to make a payment, click on “Save and Pay Bill” to pay the current and prior payments all at once.

Adjust Bill

The Adjust Bill screen is used to update recurring contributions and make one-time adjustments to the current bill. ?

When should I remit my contributions?
 *Payment is due by the 20th of the month following withholding. IRS regulations provide that elective deferrals (i.e. tax-sheltered e should be applied to a participant's account within 15 business days after the month in which the deferral is withheld.

Retirement Plan Name Monthly - Last payment received on 3/31/2022

▼ Prior pay period contributions: **\$200.00** [View Details](#)

2/28/2022 \$200.00 [Delete](#)

[Create a new Prior Paycheck Payment](#)

2 Active Employees

	Source ?	Recurring Contribution	One-Time Adjustment	Current Bill Total	Skip ?
Doe, John XXX-XX-XXXX Suspend contributions Terminate employee	Employee Tax Sheltered	770.00	0.00	770.00	<input type="checkbox"/>
	Employer	625.00	0.00	625.00	<input type="checkbox"/>
	Add/Remove Source				
Subtotal		\$1,395.00	\$0.00	\$1,395.00	
Doe, Jane XXX-XX-XXXX Suspend contributions Terminate employee	Employee Tax Sheltered	100.00	0.00	100.00	<input type="checkbox"/>
	Add/Remove Source				
	Subtotal	\$100.00	\$0.00	\$100.00	
Hide subtotals ▼					
	Employee Contributions	\$870.00	\$0.00	\$870.00	
	Employer Contributions	\$625.00	\$0.00	\$625.00	
	Totals	\$1,495.00	\$0.00	\$1,495.00	

[Save](#)
[Save and Pay Bill](#)

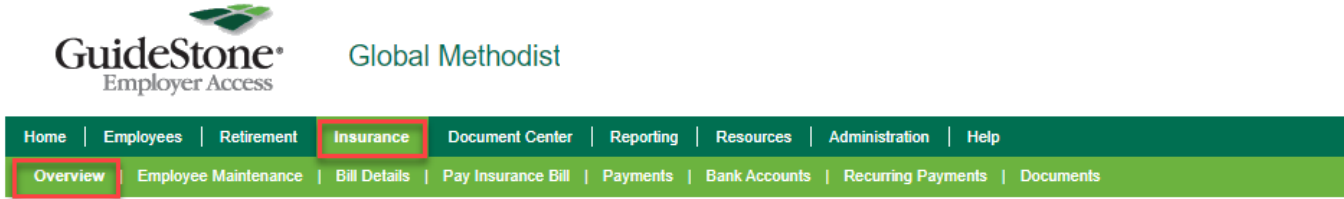
You will see the prior pay period contributions listed here. You may keep adding additional prior pay periods.

You will then click on Save and Pay Bill. This will make one payment to total of all prior pay periods including the current pay period.

Insurance Tab

Overview

This page displays the current bill that is due. You have the option to view the bill in detail or go directly to the Pay Insurance Bill screen.



Insurance Billing Overview

Most Recent Bills

Group Type	Due Date	Amount	Amount Due		
Group Plans	3/1/2024	\$6,390.72	\$6,390.72	View	Pay

On the Bill Details tab, you can see a breakdown of the health products by employee. When you are ready to pay the bill, click the “Make a Payment” button.

Bill Details

This screen provides a breakdown of the products and cost for each employee. This does not reflect how much the employee and employer are responsible for paying. This is done via payroll deductions.

Home	Employees	Retirement	Insurance	Document Center	Reporting	Resources	Administration	Help
Overview	Employee Maintenance	Bill Details	Pay Insurance Bill	Payments	Bank Accounts	Recurring Payments	Documents	

Bill Details

Bill Period: 03/2024 - \$6,390.72

Download:

- [Excel/CSV](#)
- [PDF](#)

Month of Coverage: 03/2024	
Current Charge:	\$6,390.72
Prior Charge:	\$0.00
Adjustments:	\$0.00
Unapplied Payments:	\$0.00
Total Billed Amount:	\$6,390.72
Amount Due: \$6,390.72	
Make a Payment	

Details By Participant

Details By Product

Details By Category

Product Descriptions

Participant Name	Birth Date	SSN	Salary	Product	Coverage	Participant Charge	Dependent Charge	Total Charge
LEWIS, ELSA	1/1/2000	XXX-XX-4968	\$5,000.00					
				AD&D	\$20,000.00	\$0.50	\$0.00	\$0.50
				DENTPR		\$39.93	\$59.90	\$99.83
				ELIFE	\$20,000.00	\$0.80	\$0.00	\$0.80
				HHC1000		\$1,000.00	\$1,500.00	\$2,500.00
				PRLTD	\$5,000.00	\$3.50	\$0.00	\$3.50
				VISSTN	\$0.00	\$8.67	\$7.02	\$15.69
				Total:				\$2,620.32
PAUL, SAINT	8/19/1974	XXX-XX-7779	\$3,500.00					
				DENTPR		\$39.93	\$0.00	\$39.93
				ELIFE	\$168,000.00	\$42.00	\$0.00	\$42.00
				HHC1000		\$1,000.00	\$0.00	\$1,000.00
				PRLTD	\$3,500.00	\$12.95	\$0.00	\$12.95
				Total:				\$1,094.88
RIOS, RAMSES	1/1/1970	XXX-XX-3154	\$4,500.00					
				AD&D	\$108,000.00	\$2.70	\$0.00	\$2.70
				DENTPR		\$39.93	\$59.90	\$99.83
				ELIFE	\$108,000.00	\$46.44	\$0.00	\$46.44

Pay Insurance Bill

Verify the bank account you want to use, the amount and insert a scheduled payment date. Then click "Next".

Home | Employees | Retirement | **Insurance** | Document Center | Reporting | Resources | Administration | Help

Overview | Employee Maintenance | Bill Details | **Pay Insurance Bill** | Payments | Bank Accounts | Recurring Payments | Documents

Enroll New Employee

Retirement

[Update Contributions](#)
[Reactivate Contributions](#)
[New Enrollment or Rehire](#)

Insurance

[Update Salaries](#)

Group Plans Insurance

[Add Employee](#)

Pay Insurance Bill

Enter a pay date to pay the current insurance bill. Click the Edit link next to the Payment Amount to make changes to the amount being paid.

Plan: Group Plans

Billing Frequency:

Account: GMC Bank - Checking - XXXXXX3057

Current Charge: \$0.00

Prior Charge: \$0.00

Adjustments: \$0.00

Unapplied Payments: \$0.00

Bill Amount: \$0.00

Payment Amount: 1500

Coverage Month:

Scheduled Payment Date: 08/05/2024

Next

Verify the amount and insert the date you want the amount drafted from the church's bank account.

Verify the information is correct and then click "Pay Bill".

Home | Employees | Retirement | **Insurance** | Document Center | Reporting | Resources | Administration | Help

Overview | Employee Maintenance | Bill Details | **Pay Insurance Bill** | Payments | Bank Accounts | Recurring Payments | Documents

Enroll New Employee

Retirement

[Update Contributions](#)
[Reactivate Contributions](#)
[New Enrollment or Rehire](#)

Insurance

[Update Salaries](#)

Group Plans Insurance

[Add Employee](#)

Pay Insurance Bill

Confirm Payment Information

Plan: Global Methodist [#73585] - Group Plans

Billing Frequency:

Account Name: GMC Bank

Account Type: Checking

Account Number: XXXXXX3057

Scheduled Payment Date: **08/05/2024**

Current Charge: \$0.00

Prior Charge: \$0.00

Adjustments: \$0.00

Unapplied Payments: \$0.00

Bill Amount: **\$0.00**

Amount to be Drafted: **\$1,500.00**

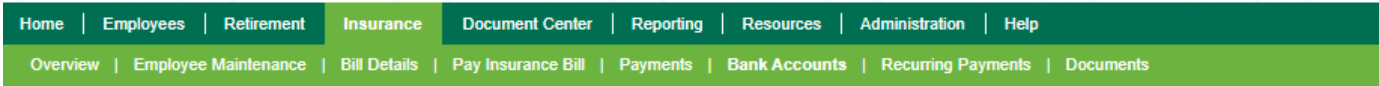
Back **Pay Bill**

Bank Accounts

On the **Bank Accounts** tab, you can add or delete the accounts to pay your insurance bill.

Note: even if you set up the bank account for the retirement bills, you have to do this separately for the insurance bills as some churches may want to use different accounts for each product.

Click the "Add a Bank Account" and a separate pop up window will appear with the banking information that is needed. Click "Add Account".



Bank Accounts

Here you can manage the accounts from which you want to make payments. To add a bank account, click "Add a Bank Account" below. You may also edit or delete existing bank accounts.

Name	Method	Type	Number		
GMC Bank	ECheck	Checking	XXXXXXXXXX3057	Edit	Delete
Test Account	ECheck	Checking	XXXXXXXXXX7890	Edit	Delete

[Add a Bank Account](#)

Add Bank Account

Payment Method: ▾

Account Nickname:

Account Number:

Account Type: ▾

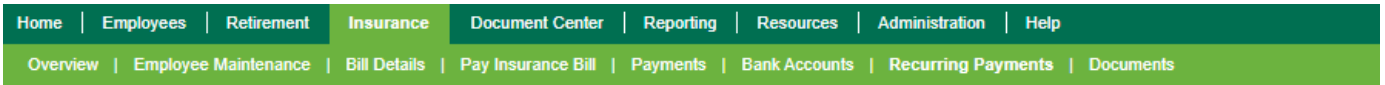
Routing Number:

Name(s) on Bank Account:

Add Account
[Cancel](#)

Recurring Payments

To set up a recurring payment on a specific day of the month, click on the **Recurring Payments** tab.



Recurring Payments

Recurring payments allow you to pay your bill automatically from a selected account. Payments will be applied to your GuideStone account on your selected payment date or the closest business day following your selected payment date that GuideStone is open. Processing times from your bank account may vary.

If you would like to deactivate a recurring payment, please click on "Edit" and then change the status to "Inactive."

[Set Up a Recurring Payment](#)

Select the bank account you want to use and the recurrence date.

Set Up Recurring Payment

Group Type: Group Plans
Payment Account: GMC Bank ▾
Recurrence: On Bill Due Date ▾
 On Bill Due Date
 Every Month on a Specific Date
Status: Active
 Inactive

You have to option to pay on the bill due date or select another date.

[Submit](#)

[Cancel](#)

If you select a date other than the bill due date, you will notice that the 5th – 14th of the month are not available options as that is the time period when the system is looking for billing changes and creating the next month's bill.

Set Up Recurring Payment

Group Type: Group Plans

Payment Account: GMC Bank

Recurrence: Every Month on a Specific Date

Deliver by Day of Month: 1

Status:

1
2
3
4
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30

Submit Cancel

Click "Submit".

Document Center Tab

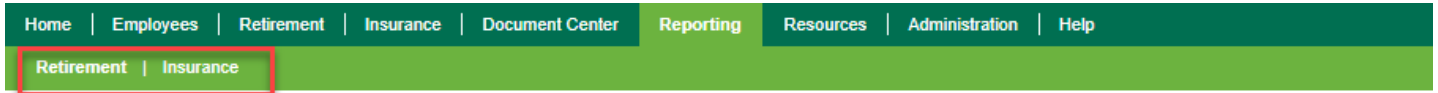
The **Document Center** tab provides access to view the defined contribution retirement plan documents such as the Adoption Agreement, Basic Plan Document, the Plan Summary.

The screenshot displays the Document Center interface. At the top, a navigation bar includes links for Home, Employees, Retirement, Document Center (highlighted with a red box), Reporting, Resources, Administration, Educational Content, and Help. Below this is a sub-header for Retirement. The main content area is titled Retirement Documents and contains two tabs: Retirement Statements and Retirement Plan Documentation (highlighted with a red box). Under Retirement Plan Documentation, there is a dropdown menu for Type set to 403(b)(9). The section is titled CHURCH NAME - PLAN and lists several documents with download icons: Adoption Agreement, Basic Plan Document, another Basic Plan Document, Plan Summary (highlighted with a yellow background and a red arrow pointing to it), and Trust Agreement. Below this is an Administrative Appendix section with links for Functions Appendix and Vendor Appendix | Create. A red callout box with an arrow pointing to the Plan Summary link contains the text: "The Plan Summary gives a good overview of the main provisions of the Plan". The footer contains copyright information for GuideStone (1997-2020) and links for Corporate Home, Privacy Policy, Security, and Contact Us.

Reporting Tab

The **Reporting** Tab contains eleven different reports that churches can run to gather data related to their plan. To run a report, follow these simple steps:

STEP 1: Click on the “Reports” subtab to see a list of reports that can be created.



Retirement Reports

Reports | Manage Schedules | Report History

Employer Activity by Source
The Employer Activity by Source report compiles cumulative totals by source for each employer you select to include when creating the report. This report displays the beginning balance, the amount of contributions, the amount of withdrawals, the amount of other credits and debits, the amount of fund exchanges, the change in market value and the ending balance by source.
[Run Now](#) [Create Schedule](#) [View Example](#)

Investment Summary
The Investment Summary report compiles cumulative totals for each fund and share class offered by each employer you select to include when creating this report. This report displays the name of the investment and its corresponding share class code, the number of participants invested in each fund, the market value in each fund, and the percentage of total assets in each fund. It should be noted that participants can, and most likely will, be invested in more than one fund on this report.
[Run Now](#) [Create Schedule](#) [View Example](#)

Participant Activity by Source
The Participant Activity by Source report compiles cumulative totals by source for each employer you select to include when creating this report, as well as a breakdown of this information at the participant level. This report displays the beginning balance, the amount of contributions, the amount of withdrawals, the amount of other credits and debits, the amount of fund exchanges, the change in market value and the ending balance by source.
[Run Now](#) [Create Schedule](#) [View Example](#)

Assets By Age
The Assets By Age report compiles cumulative totals by source for each employer you select to include when creating this report. This report displays the beginning balance, the amount of contributions, the amount of withdrawals, the amount of other credits and debits, the amount of fund exchanges, the change in market value and the ending balance by source.
[Run Now](#) [Create Schedule](#) [View Example](#)

STEP 2: To run the report, click the “Run Now” link.

Contribution History by Payroll End Date
The Contribution History by Payroll Date report compiles cumulative totals by source and payroll date for each employer you select to include when creating this report. The report contains a breakdown of the information at the participant level displaying the participant name, source of contributions and the contribution amount. Also, a summary by plan number, employer number, and payroll date is included.
[Run Now](#) [Create Schedule](#) [View Example](#)

STEP 3: Pick the format you would like the report created in, then select the date range and click “Run Report.”

STEP 4: You will receive an email letting you know the report is ready. You can find your report on the **Home** page or on the **Report History** tab.

Report Title	Run Date	Format	Created By
Investment Summary	May 17, 2023 12:21 PM	PDF	View
Investment Summary	May 6, 2022 1:16 PM	PDF	View
Participant Loans	Feb 16, 2022 5:02 PM	PDF	View
Participant Activity by Source	Jun 8, 2021 3:28 PM	PDF	View
Assets By Source	Jun 8, 2021 3:28 PM	PDF	View
Investment Summary	Jun 8, 2021 3:27 PM	PDF	View
Contribution History by Payroll End Date	Jan 11, 2021 3:22 PM	PDF	View
Contribution History by Payroll End Date	Jan 11, 2021 2:10 PM	PDF	View
Employer Ministerial Report	Sep 2, 2020 4:06 PM	PDF	View
Participant Loans	Aug 31, 2020 3:59 PM	PDF	View

Resources Tab

The **Resources** tab contains links to various retirement resources.



Resources

Insurance Resources

General Resources

- [Frequently Asked Questions](#)
- [Insurance Plan Documents and Other Resources](#)
- [Health Care Reform Information](#)

Employee Resources

- [Preventive Care Schedule](#)
- [Health Care Tools](#)
- [Member Resources](#)
- [Additional Benefits](#)
- [Teladoc](#)
- [SmartShopper](#)
- [Diabetes Management](#)
- [Express Scripts Home Delivery](#)
- [Wellness Tools](#)

Group Plans Resources

- [Group Plans Administration Manual](#)
- [Group Plans Insurance Forms](#)
- [How to Add an Employee Using the Employer Access Program](#)
- [How to Terminate an Employee Using the Employer Access Program](#)
- [How to Add an Administrator in Employer Access Program](#)
- [How to Edit an Employee's Contact Information Using Employer Access Program](#)
- [How to Edit an Employee's Salary Using Employer Access Program](#)
- [How to Add a Dependent Using Employer Access Program](#)

Claims

- [All Claims](#)

Vendor Sites

- [MyQHealth by Quantum Health](#)
- [Highmark Blue Cross Blue Shield \(BCBS\)](#)
- [Express Scripts](#)
- [Cigna Dental](#)

Resources

Security Resources

- [Security for Individuals](#)
- [Security for Organizations](#)

Retirement Resources

For your employees

- [Retirement Contribution Agreement](#)
- [Church Retirement Plan Enrollment form](#)
- [GuideStone Fund Options](#)
- [Housing Allowance](#)
- [Preparing for Retirement](#)
- [Retirement Planning & Guidance](#)
- [Calculators](#)

For your employees

- [Retirement Contribution Agreement](#)
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- [Housing Allowance](#)
- [Preparing for Retirement](#)
- [Benefit Information](#)
- [Retirement Planning & Guidance](#)
- [Calculators](#)

Plan Compliance

- [Current contribution limits](#)
- [SBC Church Plan Administration Manual](#)
- [Multiple Provider Booklet](#)

Compliance

- [Current contribution limits](#)
- [Plan Administration manual](#)
- [Non-discrimination testing guide](#)

Administration Tab

Update your User Profile

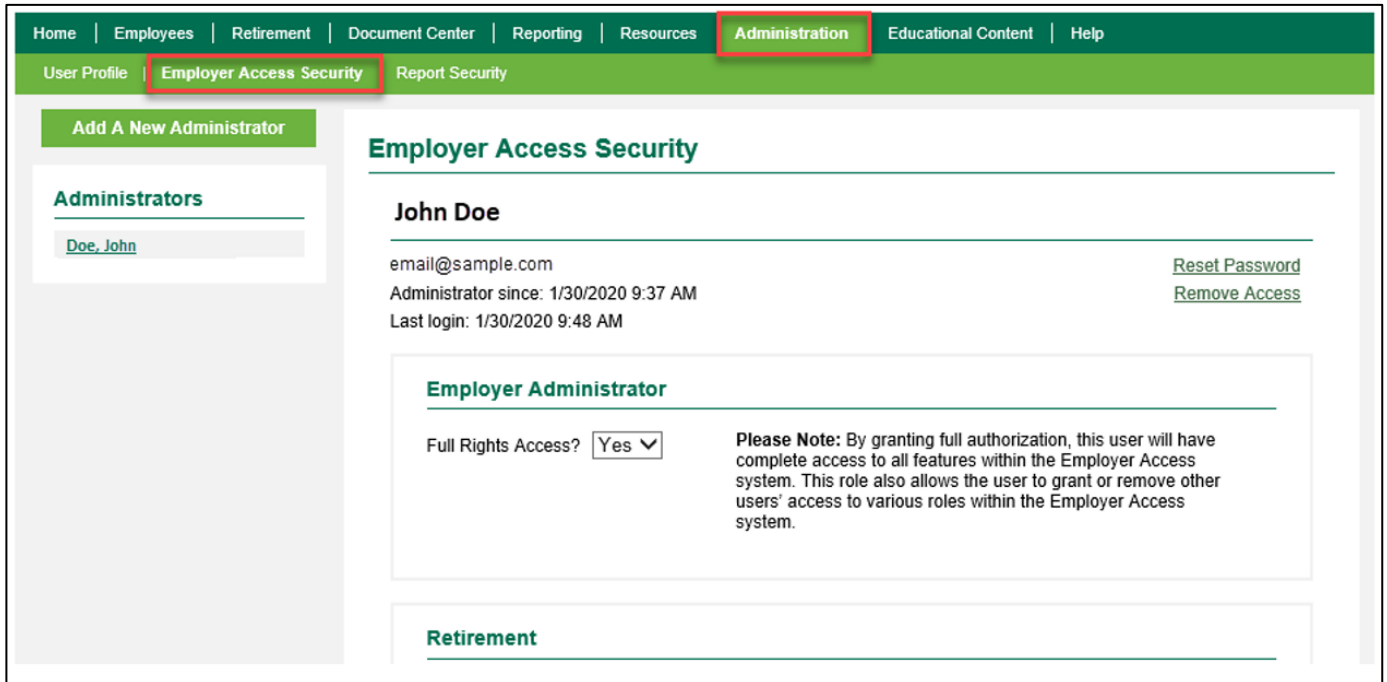
Select the **Administration** tab from the main toolbar. The screen will default to the **User Profile** subtab. You can update any item on the screen, then click the "Apply Changes" at the bottom of the screen.

The screenshot shows the 'User Profile' page in the GuideStone Employer Access system. At the top left is the GuideStone logo. To the right, there is a field for 'Church Name and Number #'. Below this is a navigation bar with tabs: Home, Employees, Retirement, Document Center, Reporting, Resources, Administration (highlighted with a red box), Educational Content, and Help. A secondary navigation bar below it has 'User Profile' (highlighted with a red box), Employer Access Security, and Report Security. The main content area is titled 'My Profile' and contains a red warning message: 'Modifications using this page are not allowed for single sign on via Abbs.' Below the warning are four sections for updating profile information: 1. 'Update my User Name' with input fields for 'New User Name' and 'Confirm New User Name'. 2. 'Update my Password' with input fields for 'Old Password', 'New Password', and 'Confirm New Password'. 3. 'Update my Security Question/Answer' with a dropdown menu for 'Security Question' (set to 'Choose a security question...'), a link to 'Create my own security question', and an input field for 'Your Answer' with a help icon. 4. 'Update my Contact Information' with an input field for 'Employer Access Email*', a checkbox for 'Do not use my email address to send bill reminders' with a help icon, and an input field for 'Phone Number'. At the bottom of the form is a CAPTCHA image showing the letters 'C3PK' and an input field to 'Enter the text in the image*'. A green 'Apply Changes' button is located at the bottom center of the page.

Add a new EAP Administrator

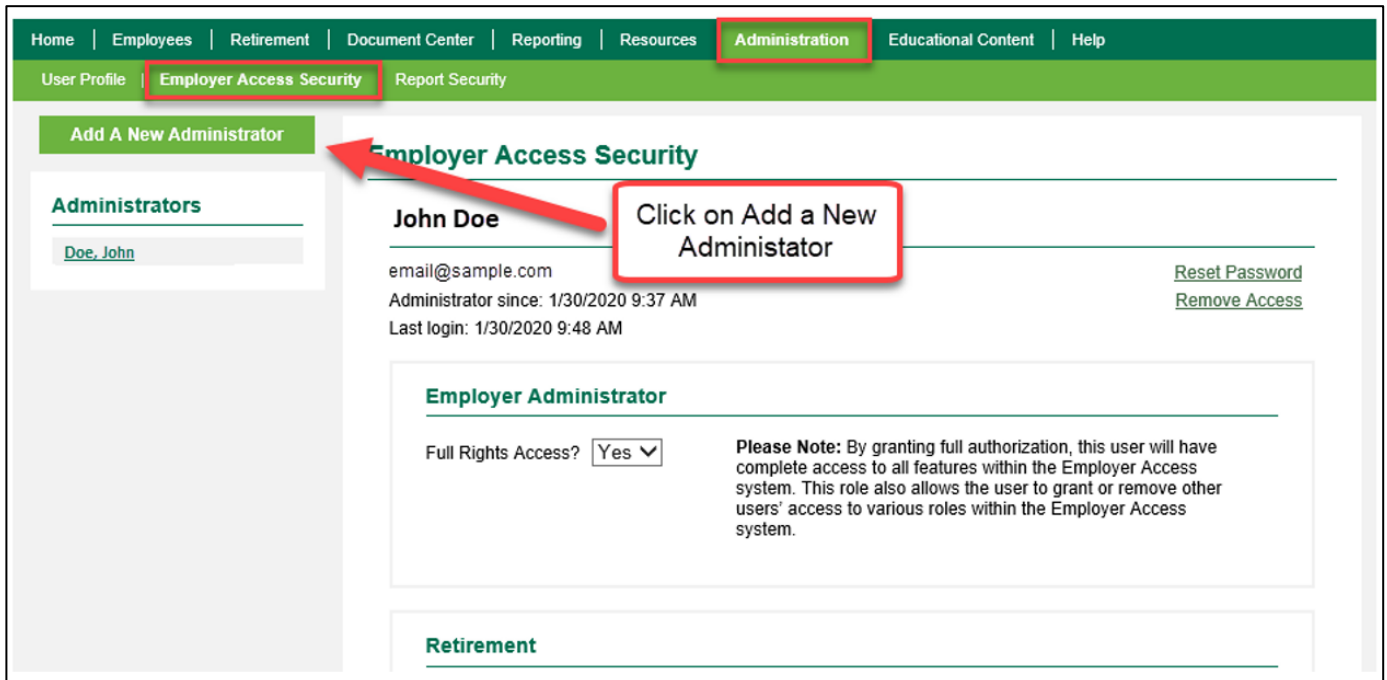
Even if there is only one individual managing the day-to-day tasks, it is always a best practice to have a backup EAP administrator.

STEP 1: Select the **Administration** tab from the main toolbar, then select **Employer Access Security**. A list of current administrators will be present on the left-hand side of the screen.



The screenshot shows the top navigation bar with the 'Administration' tab highlighted in red. Below it, the 'Employer Access Security' sub-tab is also highlighted in red. On the left sidebar, there is a green button labeled 'Add A New Administrator' and a list of administrators with 'Doe, John' listed. The main content area displays the profile for 'John Doe' with fields for email, administrator since date, and last login. There are links for 'Reset Password' and 'Remove Access'. Below the profile is a section for 'Employer Administrator' with a 'Full Rights Access?' dropdown set to 'Yes' and a 'Please Note' warning. At the bottom, there is a 'Retirement' section.

STEP 2: To add additional administrators, click on the "Add A New Administrator" button.



This screenshot is identical to the one above, but includes a red arrow pointing from a callout box to the 'Add A New Administrator' button. The callout box contains the text 'Click on Add a New Administrator'.

STEP 3: Type in the full name and email address of the New Administrator you would like to add. Next, select if the new administrator should have full or partial access rights. Lastly, scroll to the bottom of the screen and click the “Save” button. An email invitation will be sent to the New Administrator. You will receive an email with a code that will need to be given to the New Administrator for them to complete their EAP registration. Please note the code expires in four days.

Home | Employees | Retirement | Document Center | Reporting | Resources | **Administration** | Educational Content | Help

User Profile | **Employer Access Security** | Report Security

Add A New Administrator

Administrators

[Doe, John](#)

New Administrator

Administrator's Name:

Email Address:

Confirm Email Address:

Employer Administrator

Full Rights Access? No Yes

Please Note: By granting full authorization, this user will have complete access to all features within the Employer Access system. This role also allows the user to grant or remove other users' access to various roles within the Employer Access system.

GuideStone Central Access

GuideStone Central Access The user will be authorized to access the GuideStone Central education portal.

Save

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STEP 4: After the invitation is sent, the current EAP administrator will see the following pop-up window. Make sure to notate the code that was provided as it will need to be provided to the new administrator to establish their EAP account.

Confirmation

An invitation to register as an Employer Access system administrator was emailed to David Threadgill: david.threadgill@guidestone.org

Please provide the code shown below to your new administrator. For security purposes, David Threadgill will be required to enter this code in order to register as a user in the Employer access system. For your convenience, a copy of the security code will be delivered to your email address (kate.nowell@guidestone.org).

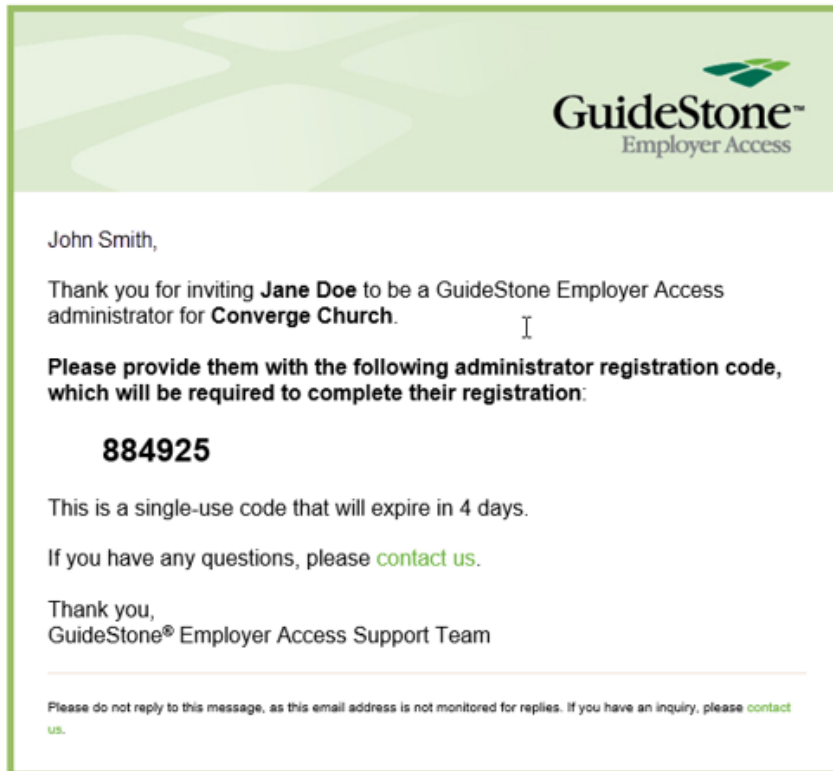
The code will expire in 4 days.

048446

Expires on 10/14/2023 1:02 PM CST

Print **Close**

The current administrator will also receive the following email:



STEP 5: The new EAP administrator will receive an auto-generated email that looks as follows:

