EMPLOYER ACCESS PROGRAM

User's Guide

GuideStone®

Table of Contents

(Each heading/subheading are hyperlinks to that section)

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.

Enroll an Employee

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

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

Enroll a new employee in...

Retirement & Insurance

Retirement

Insurance

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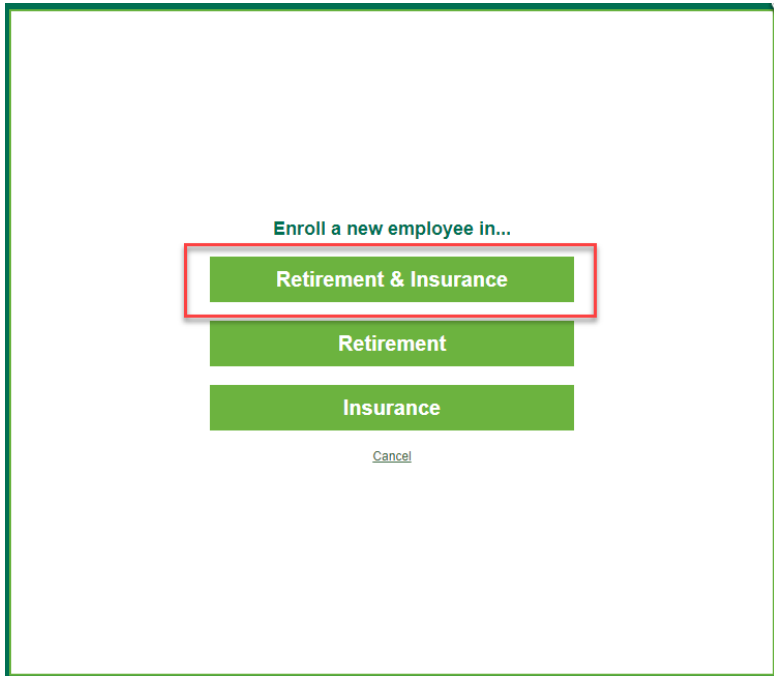
STEP 1: Input the Employee's Social Security number and date of birth. Click "Next".

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: [01/01/1970] 📅

Cancel   Next

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

Spouse Information

No Spouse SSN:	☐
Spouse SSN:	748-41-4111
Spouse Title:	Mrs. ▼
Spouse First Name:	Sally
Spouse Middle Initial:	
Spouse Last Name:	Jones
Spouse Preferred First Name:	
Spouse Birth Date:	01/15/1970
Spouse Gender:	Female ▼

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

Back   Cancel   Next

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

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. Enro |

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

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.

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

Back   Cancel   Next

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. Enro

Fund Name	Allocation Percentage
Target Date Funds	
GuideStone MyDestination 2015 (GMTZX) [1]	0
GuideStone MyDestination 2025 (GMWZX) [1]	0
GuideStone MyDestination 2035 (GMHZX) [1]	100
GuideStone MyDestination 2045 (GMFZX) [1]	0
GuideStone MyDestination 2055 (GMGZX) [1]	0
Target Risk Funds	
GuideStone Conservative Allocation (GFIZX)	0
GuideStone Balanced Allocation (GGIZX)	0
GuideStone Growth Allocation (GCOZX)	0
GuideStone Aggressive Allocation (GGBZX)	0
US Equity	
GuideStone Defensive Market Strategies (GDMZX)	0

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

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 Info | 2. Spouse Info | 3. Contact Info | 4. Employment Info | 5. Fund Allocation | 6. Billing Sources | 7. Enro |

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

[Back] [Cancel] [Enroll Now]

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

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

Address

Address: | 123 MAIN

City*: | DALLAS
State*: | Texas
Zip*: | 75201

Contact Details

Phone Number: | (214) 555-7520
Email:

Cancel   Next

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).

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

Employment Details

Classification:
GMC FT Clergy (30+ hours) ▾

Full-Time Hire Date:　08/01/2024　▦

Effective Date:　08/01/2024　▦

Monthly Salary:　5000

Back　　Cancel　　Next

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

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

Would you like to add a dependent?

[Back] [Cancel] [Yes] [No]

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

Dependent Details

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

First Name*:   Susie

Middle Initial:

Last Name*:   Doe

SSN*:   111-11-1111

☐ This is a newborn and SSN is unknown.

Birth Date*:   07/10/2012

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

Back   **Cancel**   **Done 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.

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
☑	Sam Jones (Employee)
☑	Susie Jones

Provide this _required notice_ about certain benefits to your employee.

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

[Back] [Cancel] [Next]

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

Insurance Enrollment

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

Employee Term Life

Employee Effective Date*:   08/01/2024

Product Effective Date: 08/01/2024

[Back]   [Cancel]   [Next]

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

Insurance Enrollment

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

Done

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.

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

👤 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]

💲 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]

Click here to update insurance and/or retirement salary information

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.

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

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.

GuideStone® Employer Access — Global Methodist

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

Employee Search: [Enter Name or SSN] 🔍 | 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)

Plan
Global Methodist Clergy Plan

Date range
Year to date (1/1/2024 - 7/31/2024) ▾

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

Refresh 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.

STEP 2: Click the "Terminate Employee" button.

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:	07/31/2024
Plan End Date:	07/31/2024

Termination Reason:
- ◉ Termination
- ○ Retirement
- ○ Disability
- ○ Death

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

Save

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: 07/31/2024

Termination Reason: Left Employment

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".

Add or Remove a Contribution Source

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

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.

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
Employee Tax Sheltered	0.00	+	0.00	=	0.00
Employer	350.00	+	0.00	=	350.00
Total:	**$350.00**		**$0.00**		**$350.00**

[Cancel]   [Save and Exit]

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."

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.
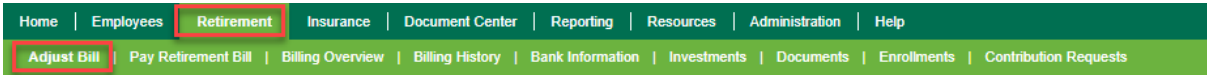
Make an On Request Contribution Payment

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.

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

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	350.00	+	0.00	=	350.00	☐
	Add/Remove Source						
	Subtotal	$350.00		$0.00		$350.00	
Doe, John XXX-XX-1357 Suspend contributions Terminate employee	Employee Tax Sheltered	1.00	+	0.00	=	1.00	☐
	Employer	1.00	+	0.00	=	1.00	☐
	Add/Remove Source						
	Subtotal	$2.00		$0.00		$2.00	
Garcia, Jonathan XXX-XX-8741 Suspend contributions	Employee Tax Sheltered	1.00	+	0.00	=	1.00	☐
	Employer	1.00	+	0.00	=	1.00	☐

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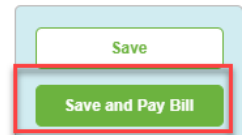
STEP 2: Input the payroll period date for the contributions. For employers remitting monthly payments, there will be a dropdown list to select from.

| 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)	
Last Payment Received:	7/10/2024

Verify the amount and insert the pay period end date

Next

Corporate Home | Privacy Policy | Security | Contact Us

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.

| 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

Confirm Payment Information

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**

Back   **Pay Bill**

Corporate Home | Privacy Policy | Security | 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"*.

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

Enter the paycheck date and select the applicable members

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

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

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	0.00	0.00
	Employer	250.00	350.00
	Subtotal:	$250.00	
Employee: Lewis, Linda **SSN:** XXX-XX-8888 Remove	Employee Tax Sheltered	0.00	1.00
	Employer	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.

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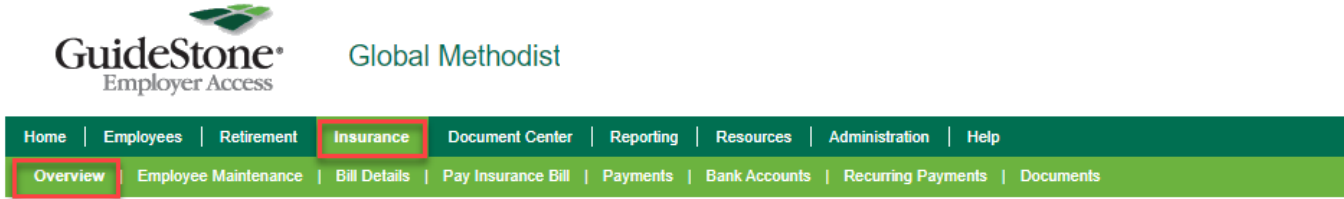
On the Bill Details tab, you can see a breakdown of the health products by employee. When you are ready to pay the bill, click the "Make a Payment" button.

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".
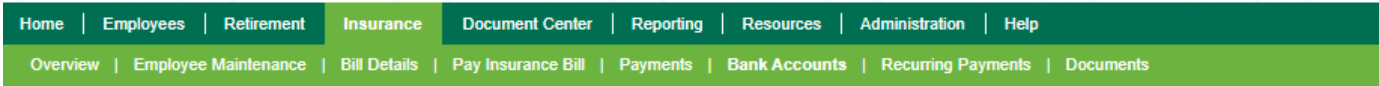

Verify the information is correct and then click "Pay Bill".

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".

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

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

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: [Electronic Check ▾]

Account Nickname: [_____]

Account Number: [_____]

Account Type: [Checking ▾]

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.

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

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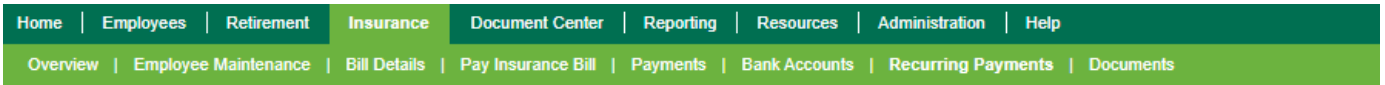
Recurring Payments

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 Dat ▾
Deliver by Day of Month: 1 ▾

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

Status: tive
            ctive

Subr   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.

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.

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

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.

Resources Tab

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

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

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 Mangement
- 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
- Retirement Plan Enrollment form
- GuideStone Fund Options
- 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

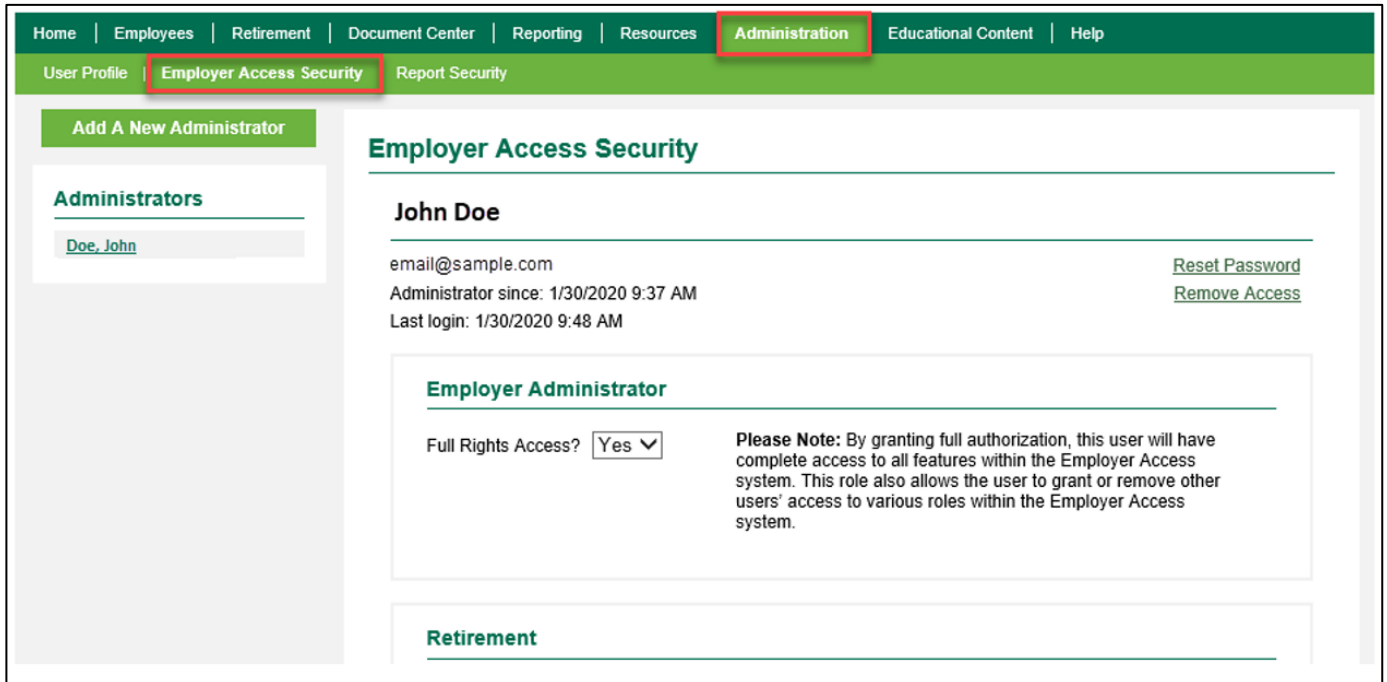# Administration Tab

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.
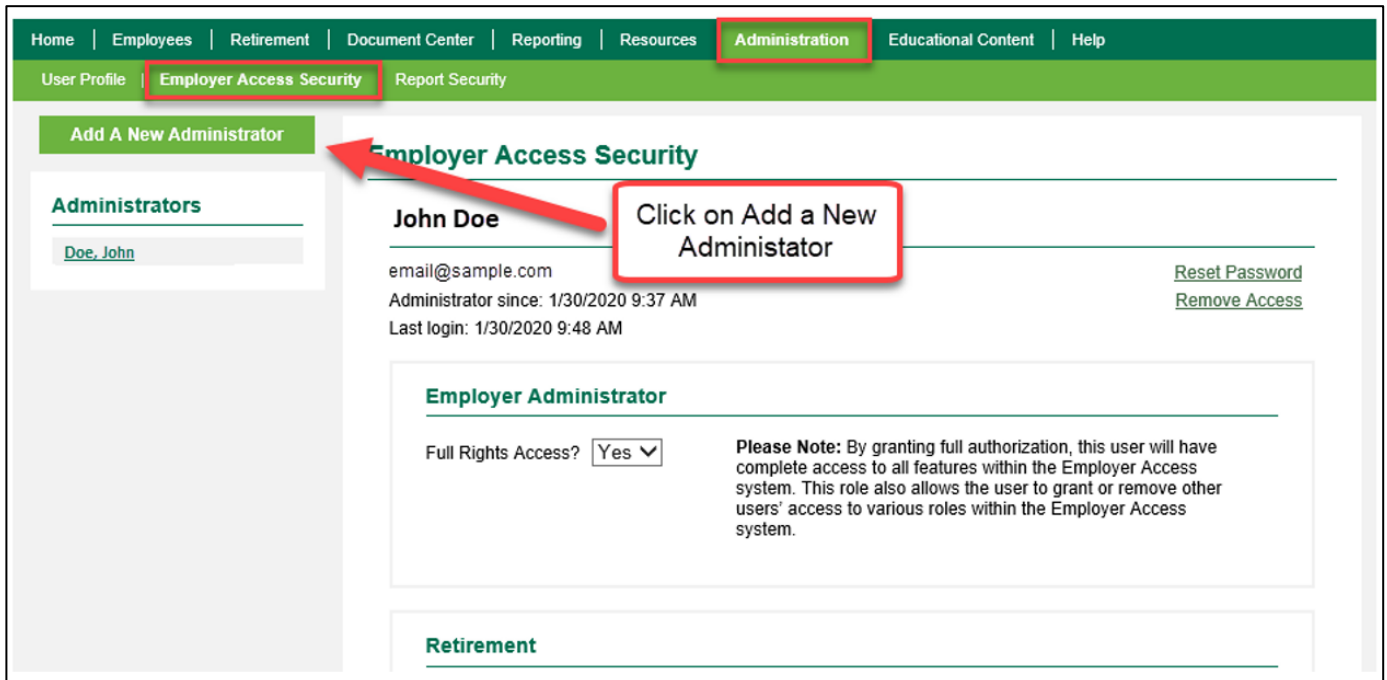
Add a new EAP Administrator

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.

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

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.

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.

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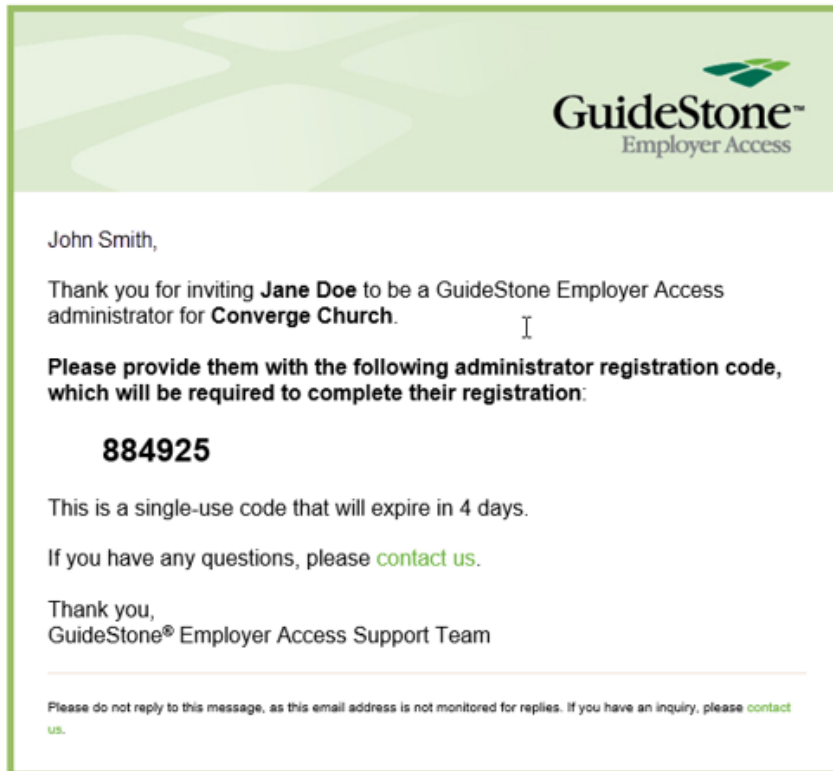
STEP 5: The new EAP administrator will receive an auto-generated email that looks as follows: