EMPLOYER ACCESS PROGRAM

User's Guide

GuideStone®

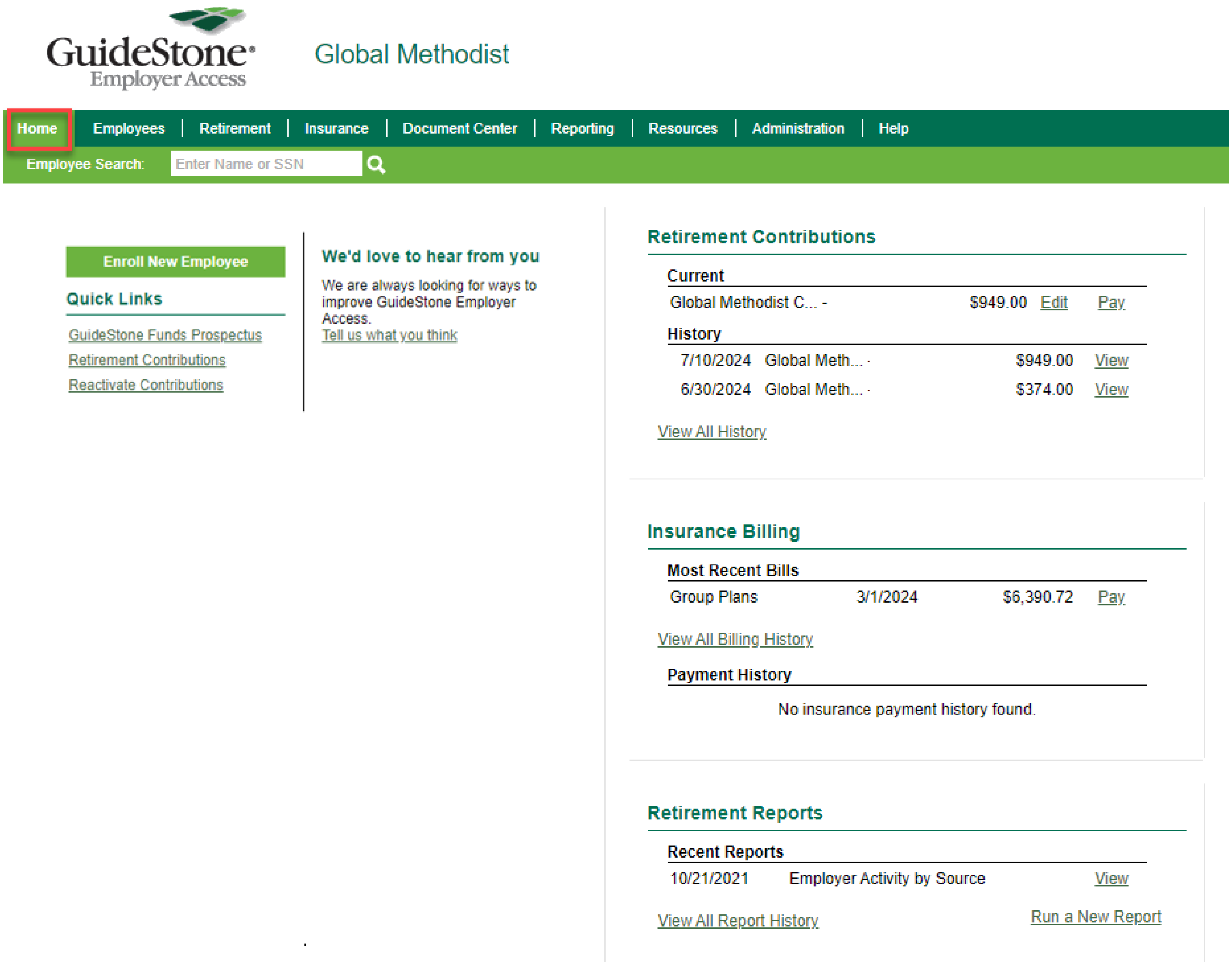
Table of Contents

(Each heading/subheading are hyperlinks to that section)

Home Tab

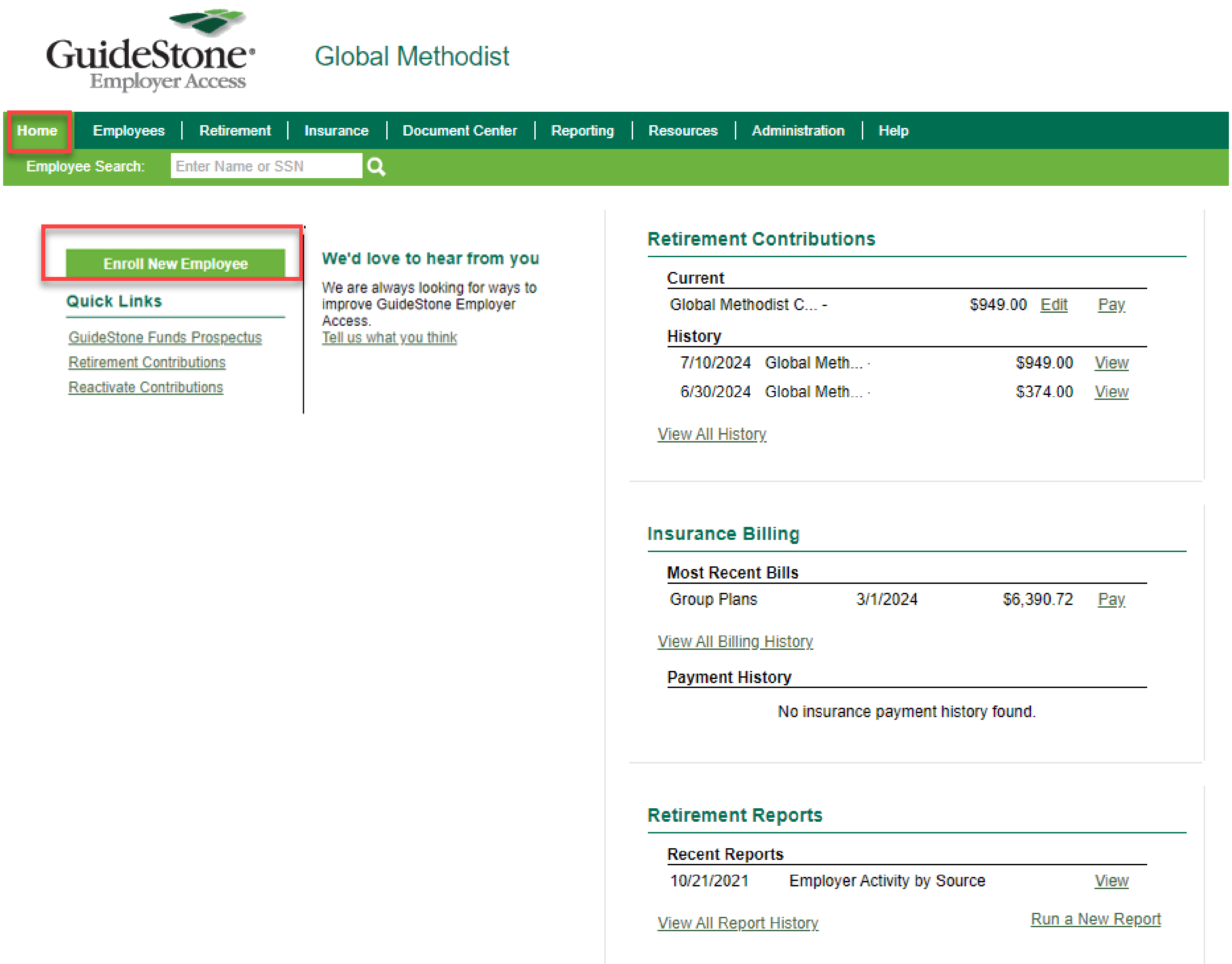
Getting Started

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.

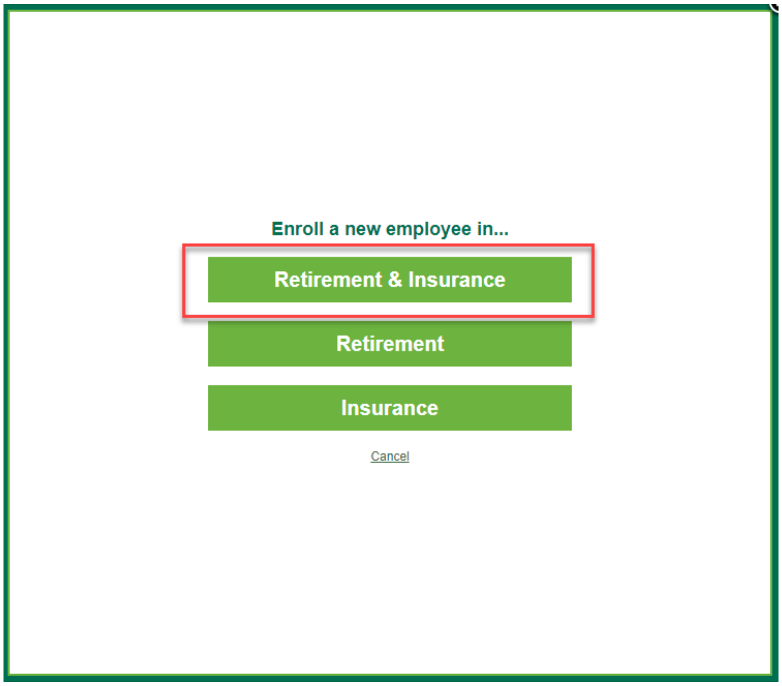


Enroll an Employee

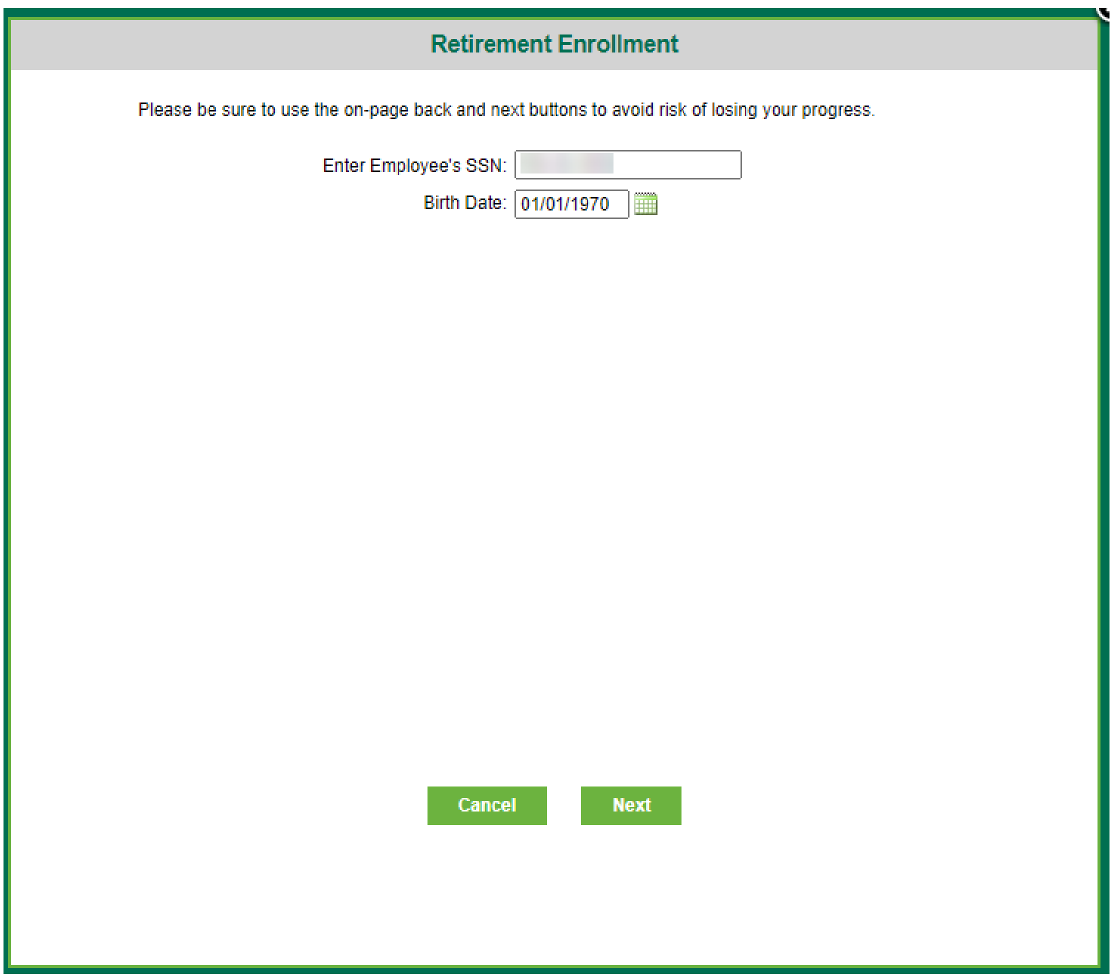
On the **Home** tab, click the “Enroll New Employee” button.



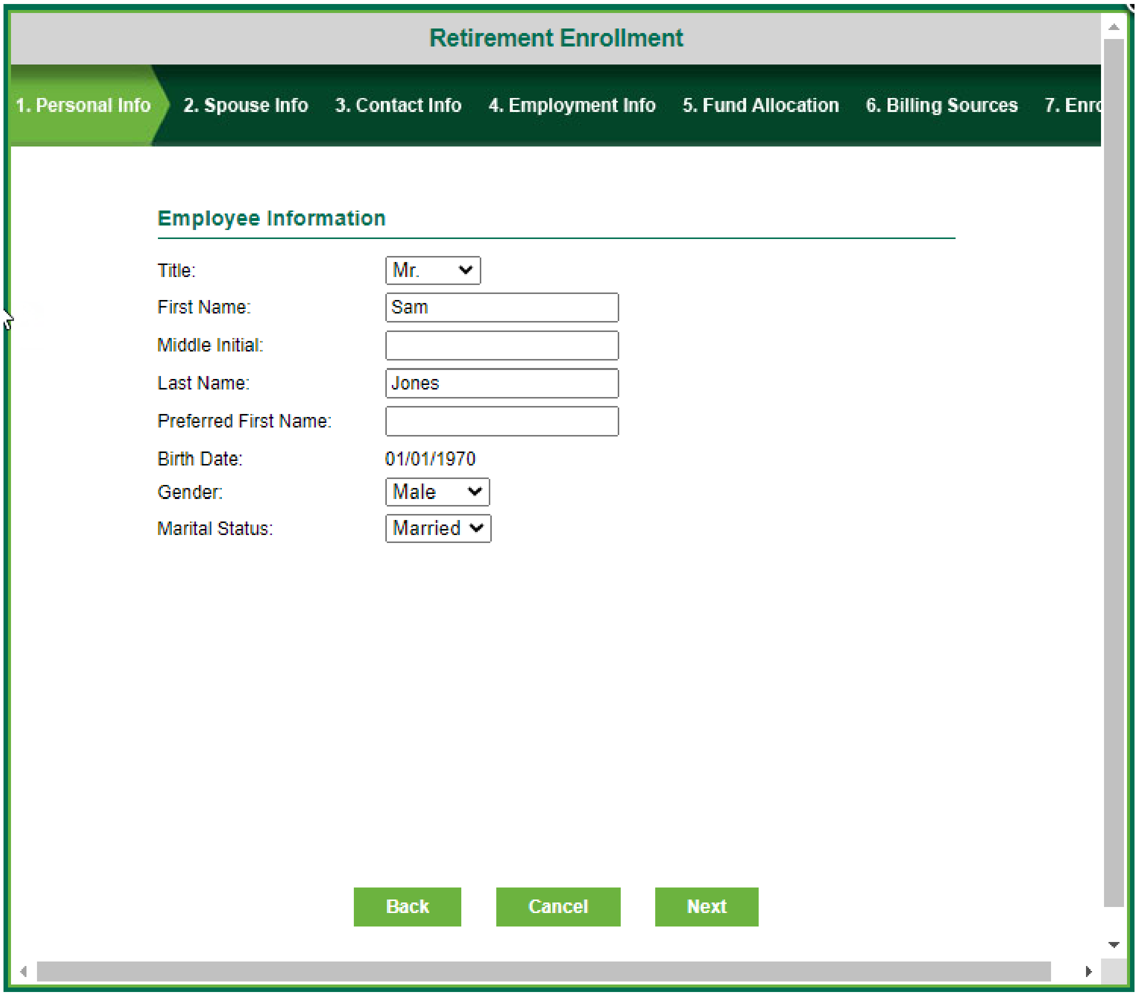
A popup window will appear; in most cases, you will select "Retirement & Insurance"



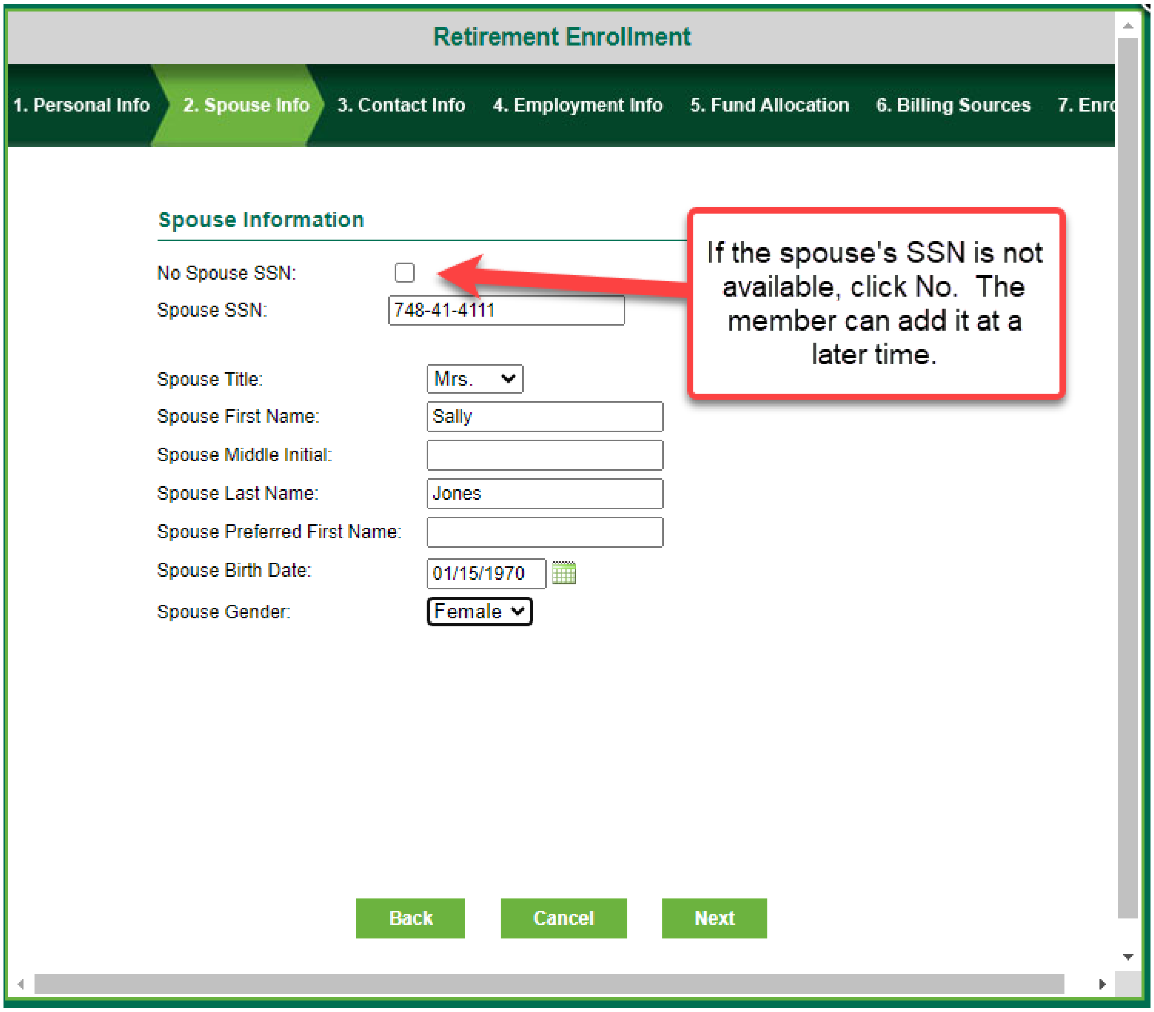
STEP 1: Input the Employee's Social Security number and date of birth. Click "Next".



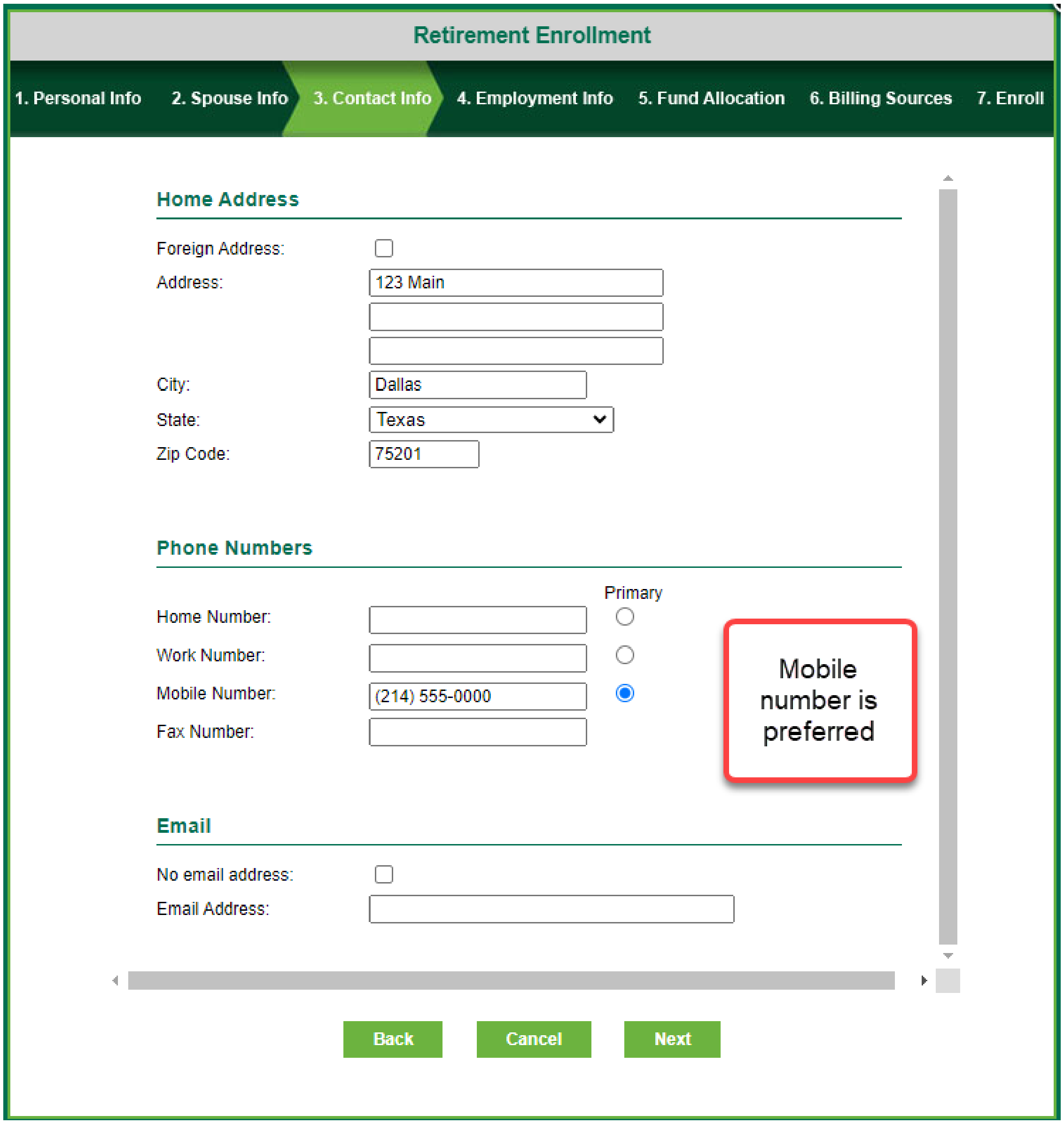
STEP 2: Input the Personal Info and click "Next".



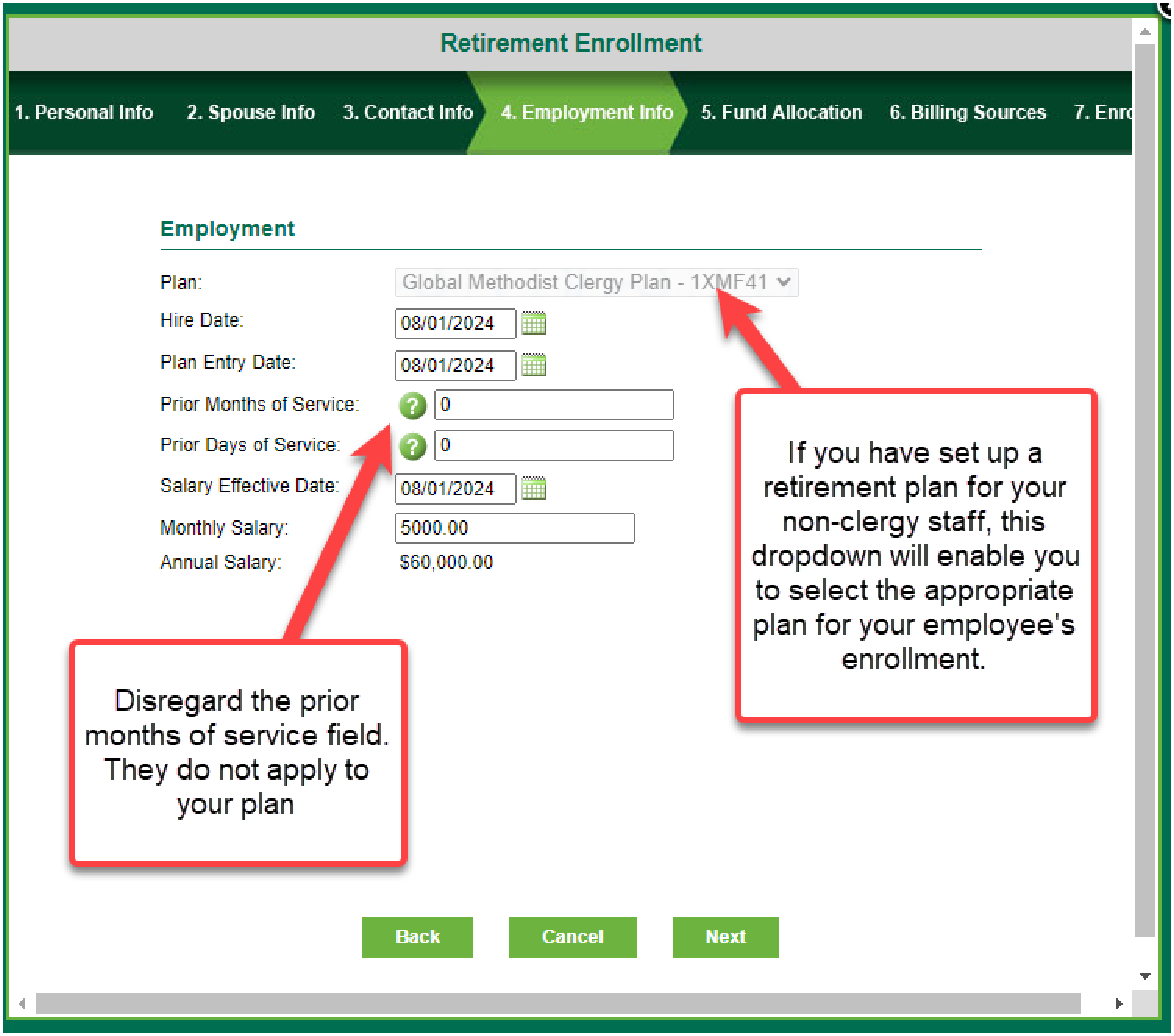
STEP 3: Input the Spouse Info and click “Next”.



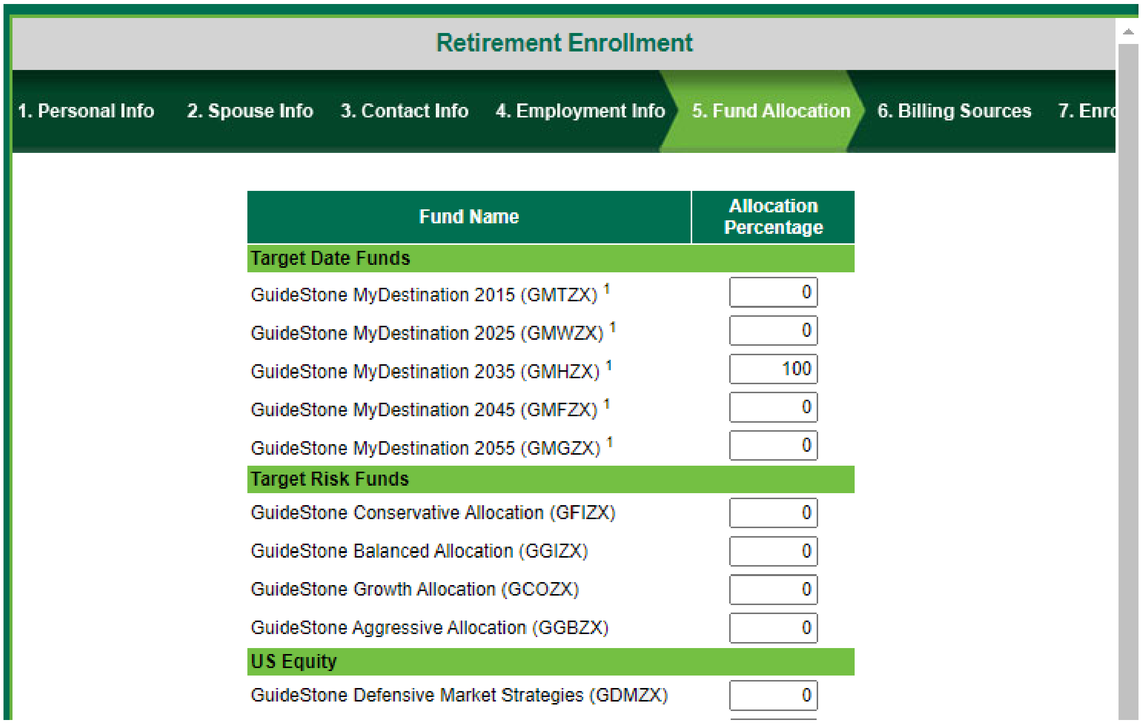
STEP 4: Input the employee's contact information and click "Next".



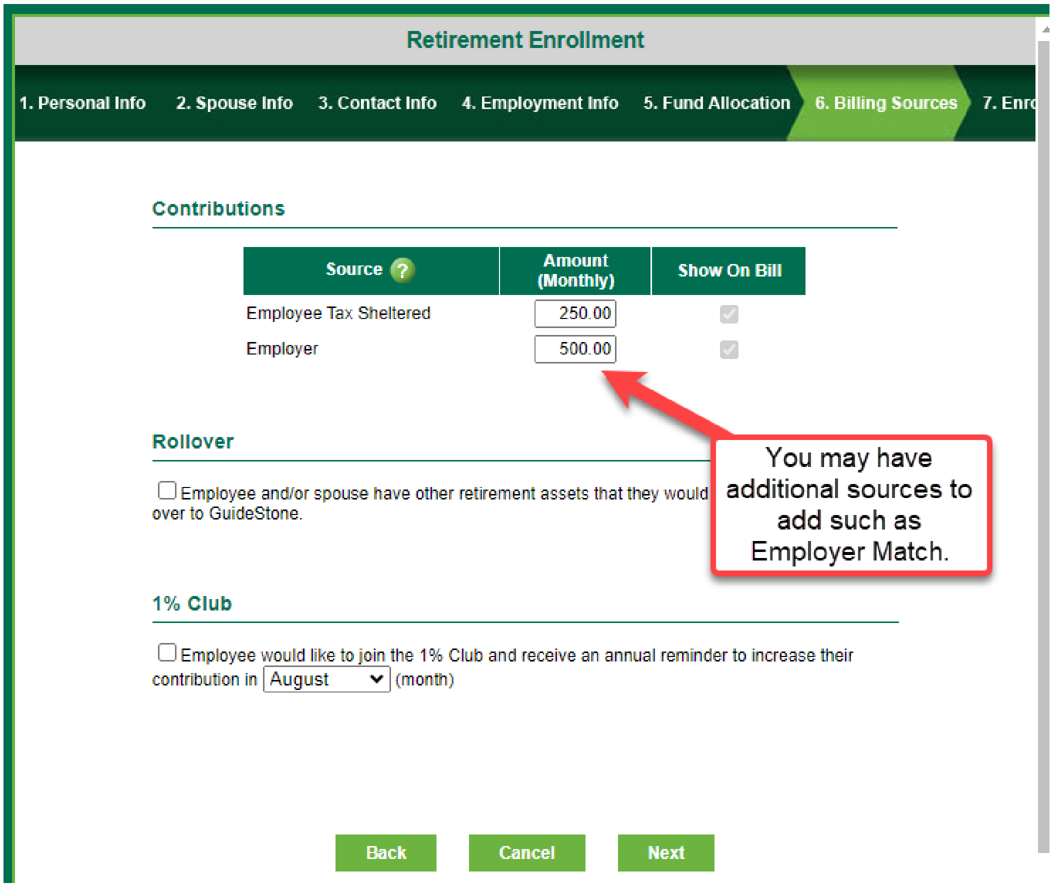
STEP 5: Input the employee's Hire Date (date employee hired with church), Plan Entry Date (1st day of current month), Salary Effective Date and Monthly Salary.
Click "Next".



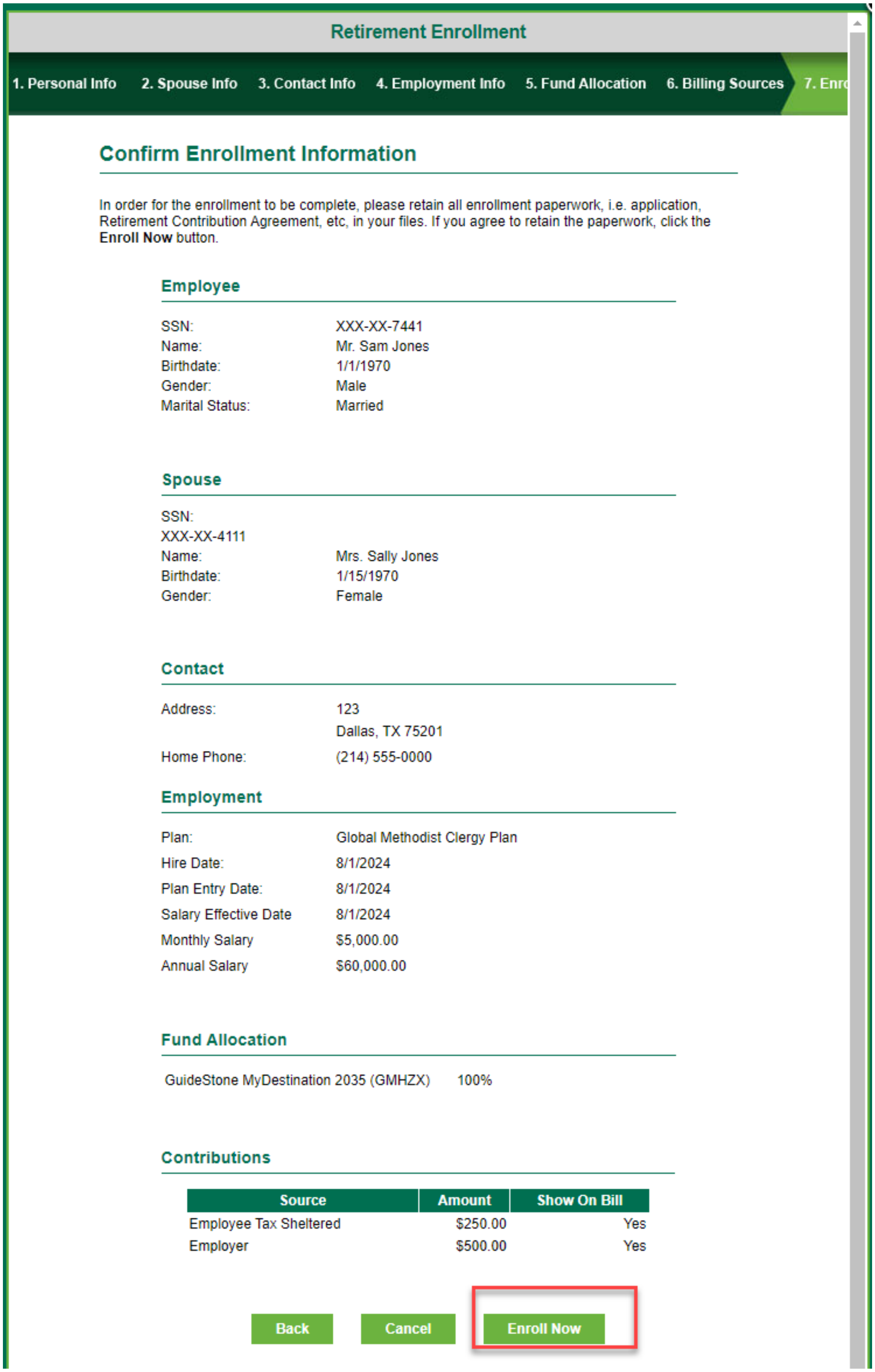
STEP 6: This screen indicates the contributions will be invested into the retirement plan. This is informational only. Click “Next.”



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

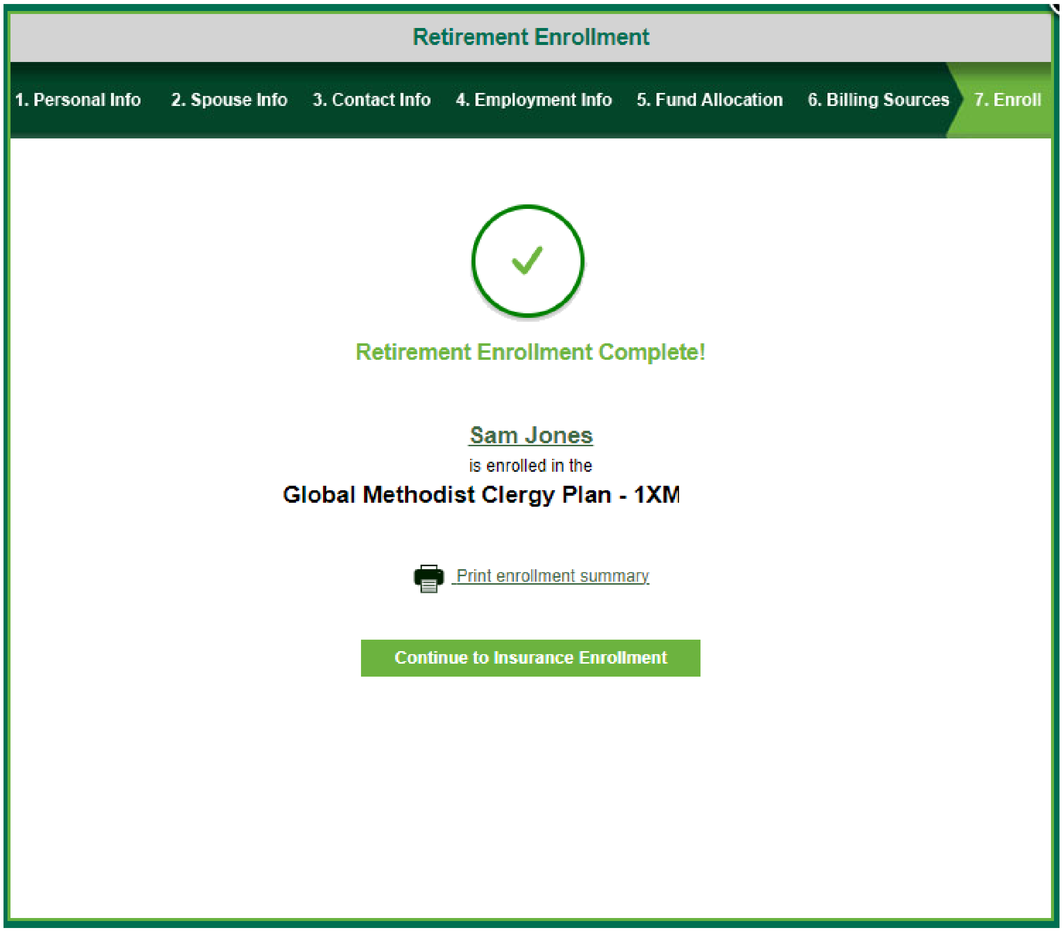
GuideStone MyDestination 2035 (GMHZX) 100%

Contributions

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

Back Cancel Enroll Now

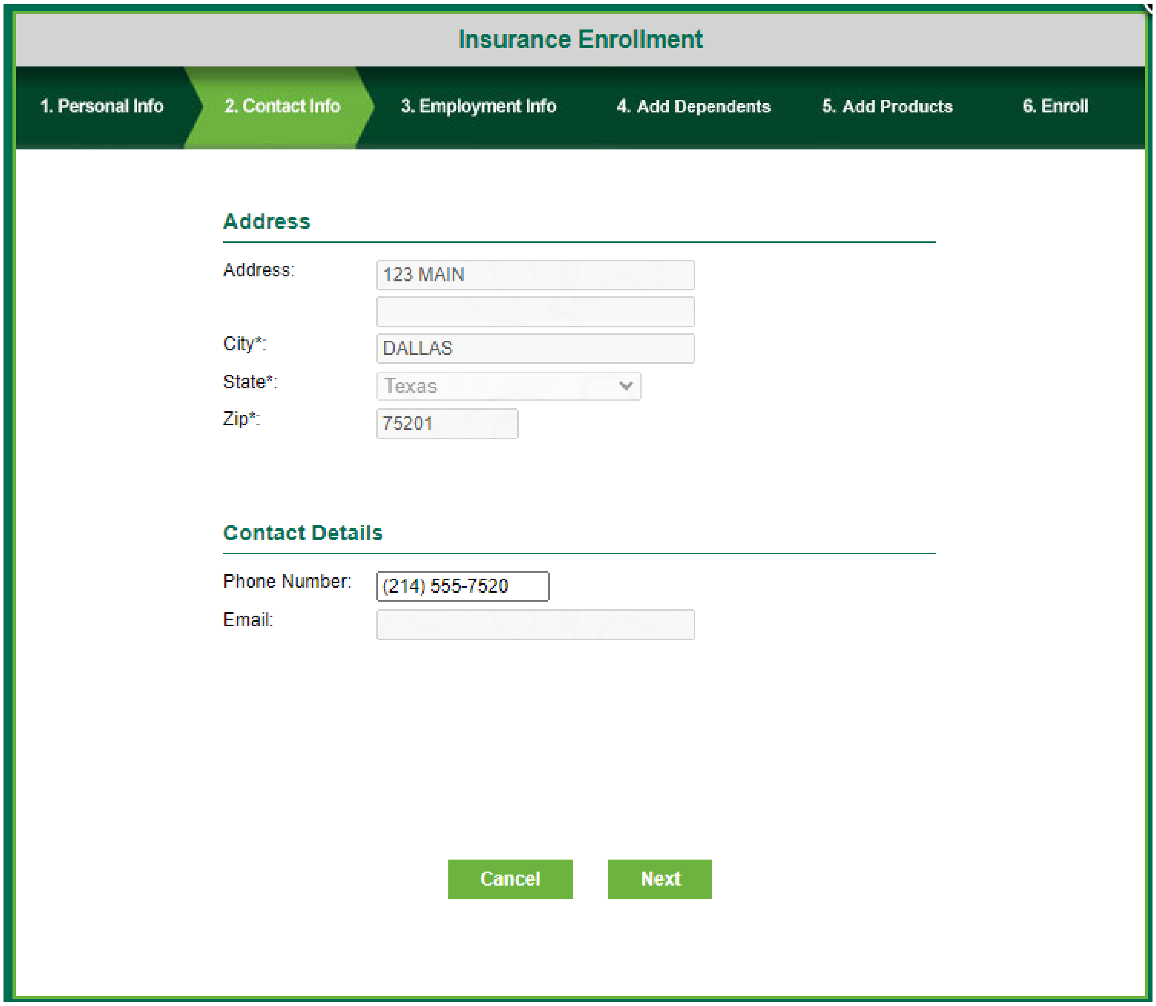
This completes the enrollment for the retirement plan and you can click "Continue to Insurance Enrollment" to finish the enrollment process.



Enrolling in the Health Plans

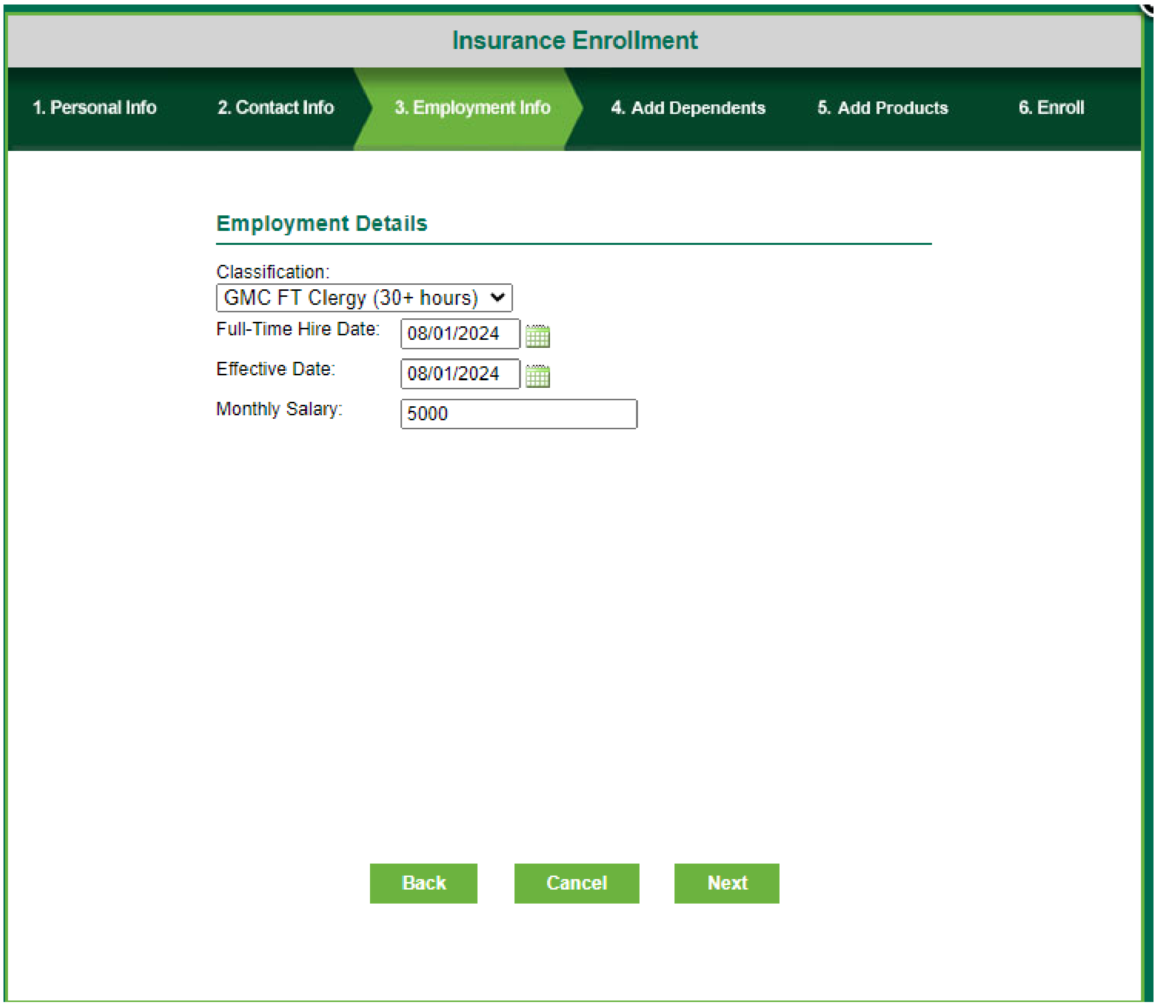
Some of the information provided in the retirement enrollment will be applied to the insurance enrollment, but there may be screens where you have repeat the information.

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

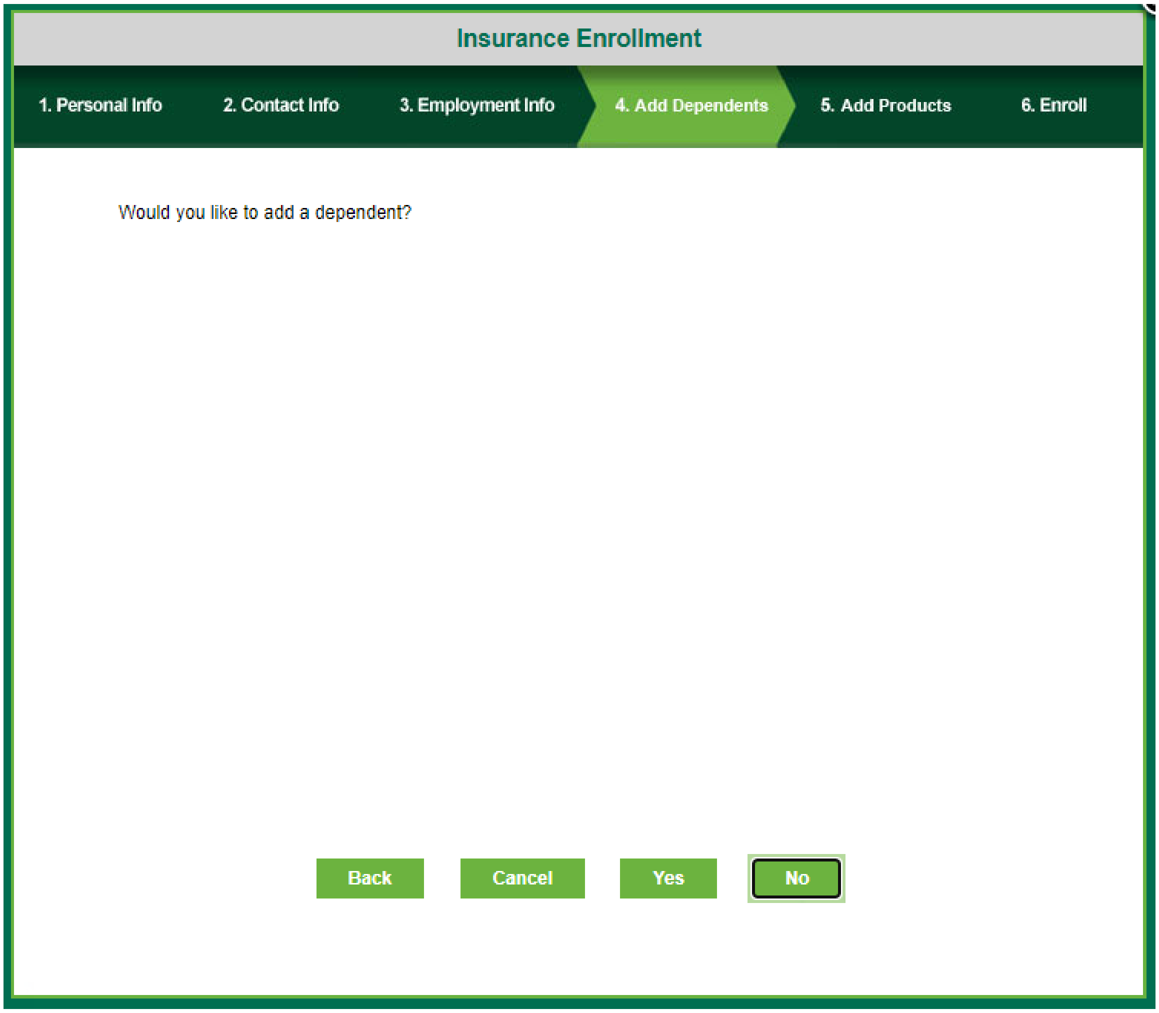


STEP 2: Select the employee's classification and input their hire date, effective date, and monthly salary. Click "Next".

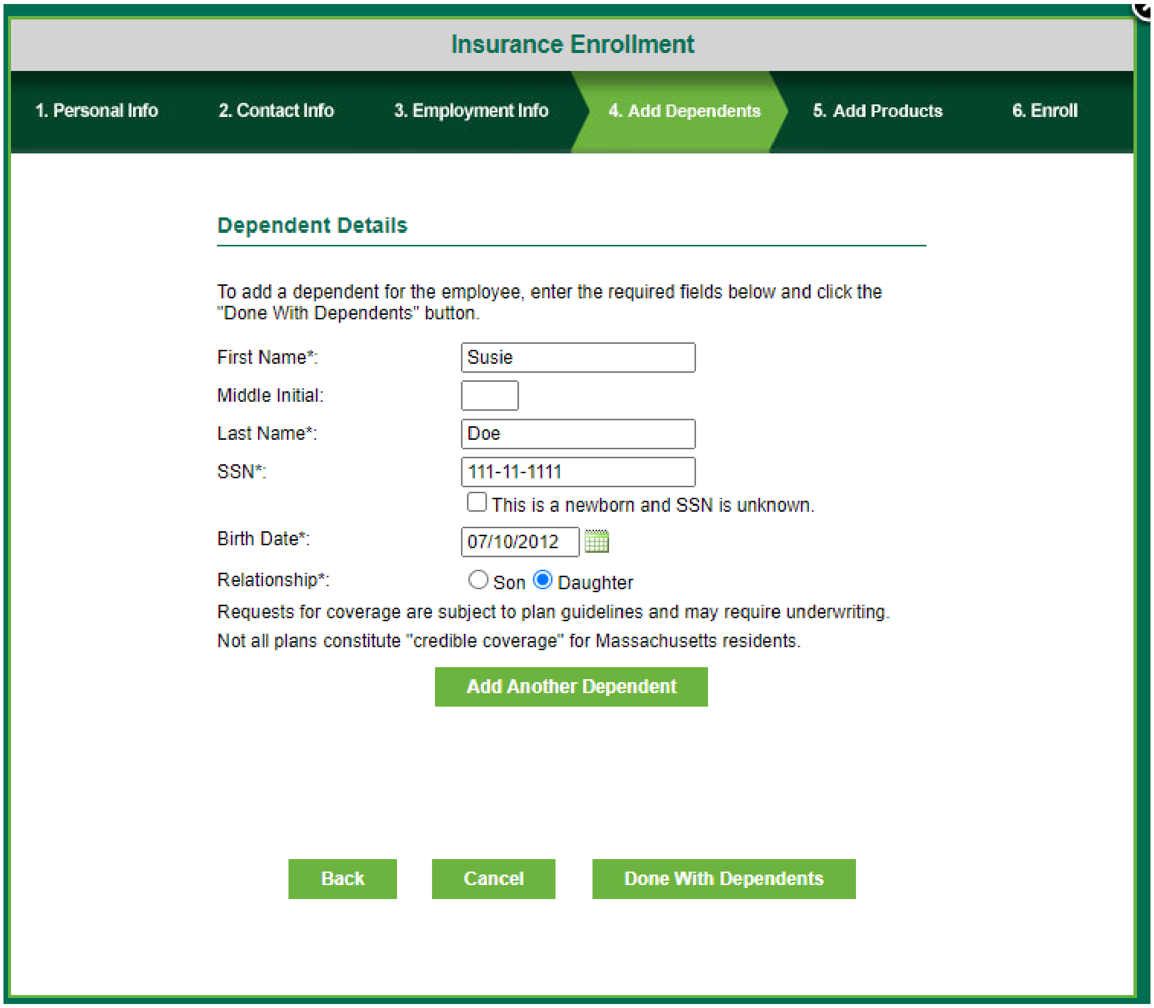
If your employee works 40 hours per week, select "GMC FT Clergy (30+ hours). If your employee works 30 -40 hours per week, select "GMC 75% Clergy (29 hours).



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

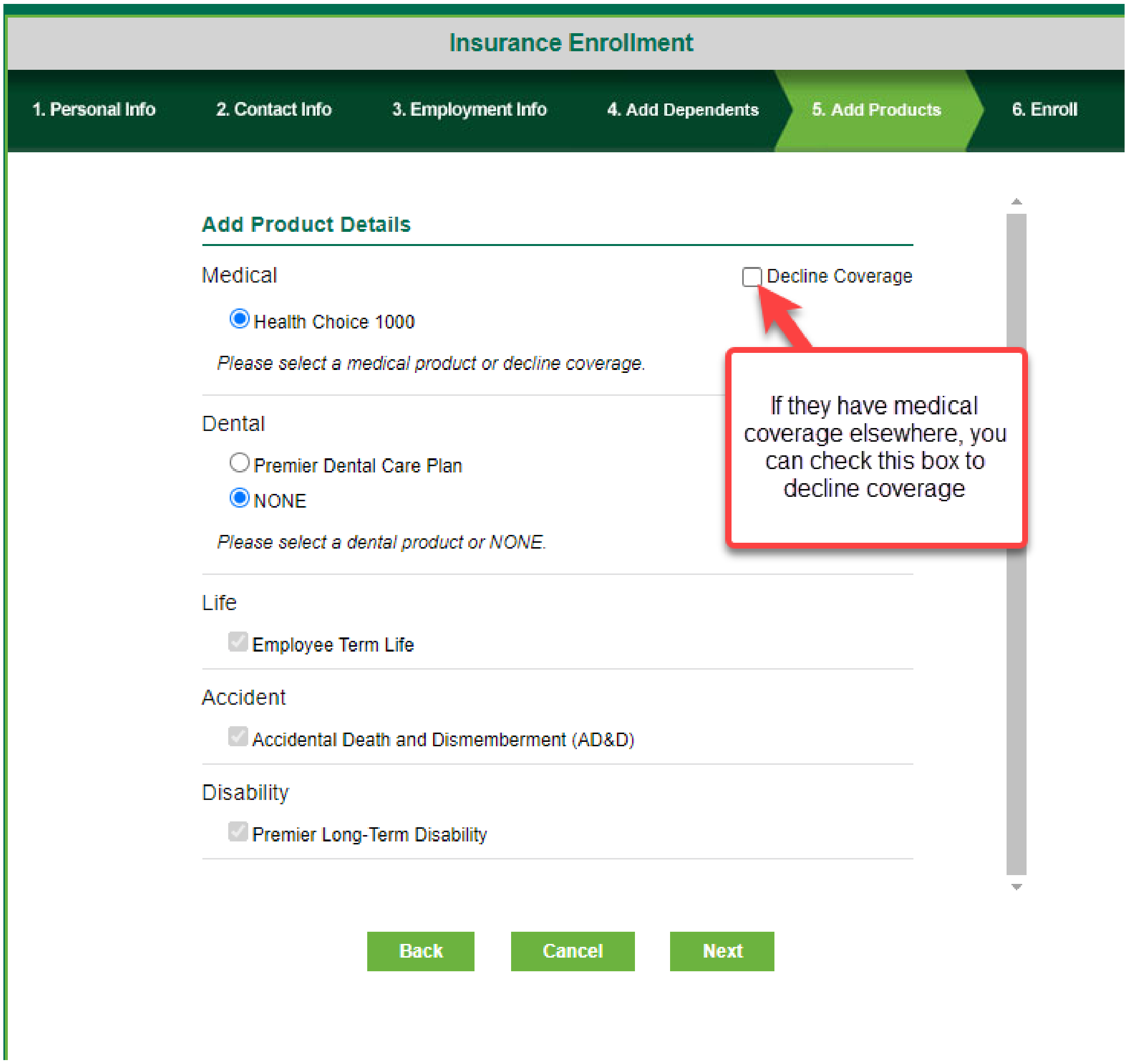


STEP 4: If you selected "Yes", you will be directed to this page to add your dependents. You will add each dependent one at a time. Once you are finished, you can click "Done with Dependents" to proceed.

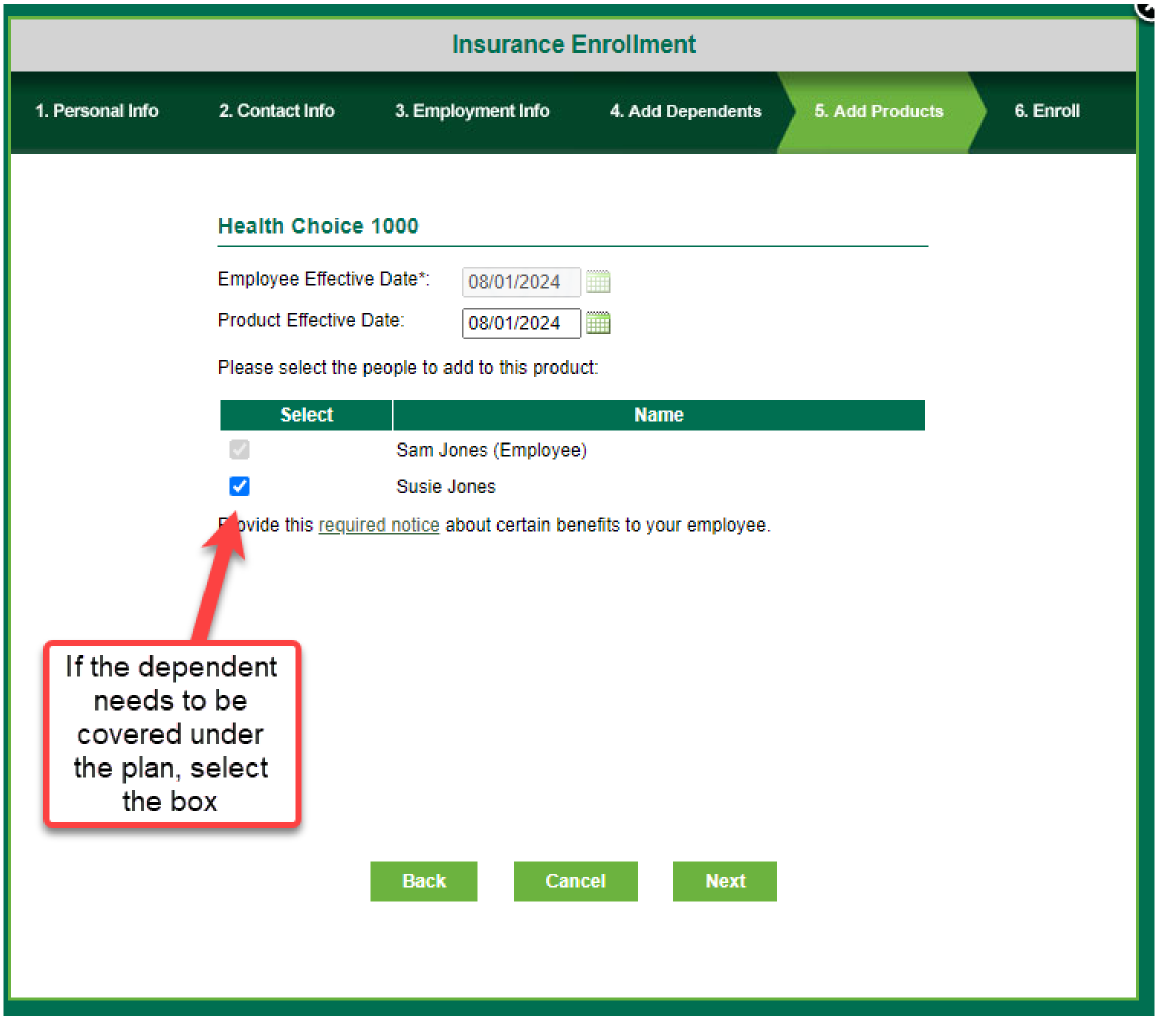


STEP 5: This next screen will display all of the health and life products available to your employees. Select the plan(s) they are interested in. Click "Next".

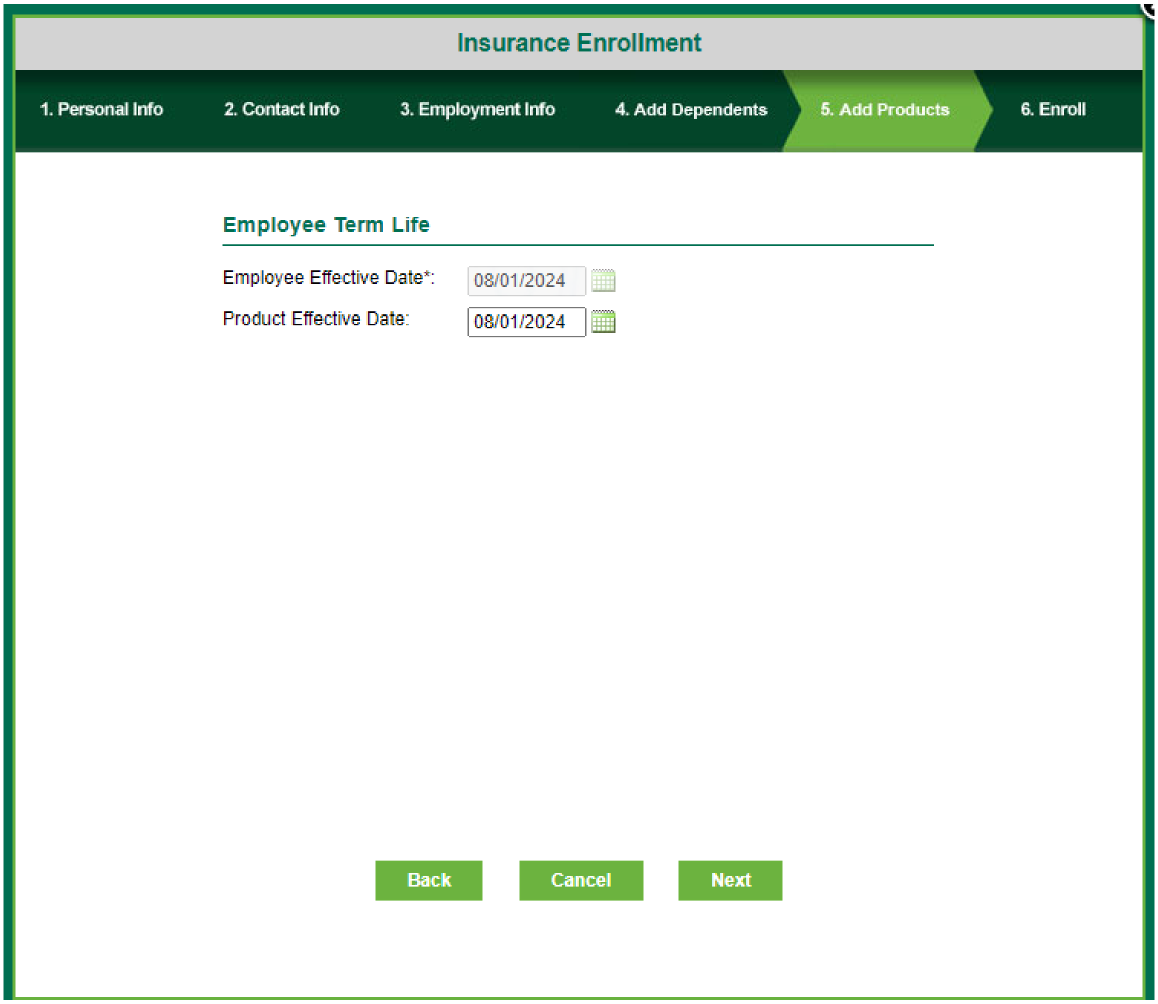
If your clergy employee works 30 hour or more per week, then medical coverage is required. However, if they have coverage elsewhere such as on their spouse's health plan, Medicare, retired military, etc, they can waive the coverage by selecting the "Decline Coverage" checkbox. You will be contacted by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



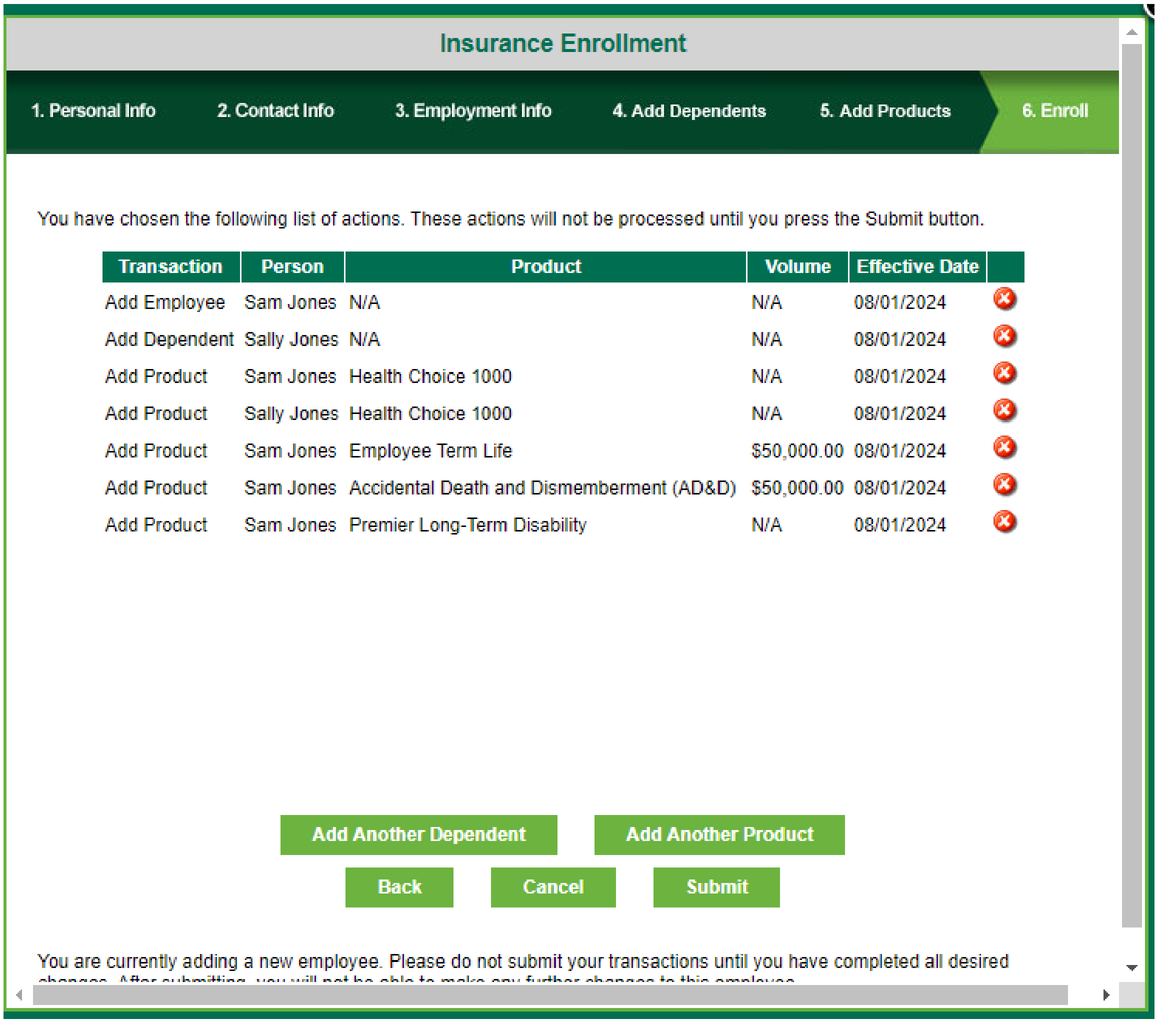
STEP 6: Indicate if any of the dependents are to be covered for the displayed product(s).



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

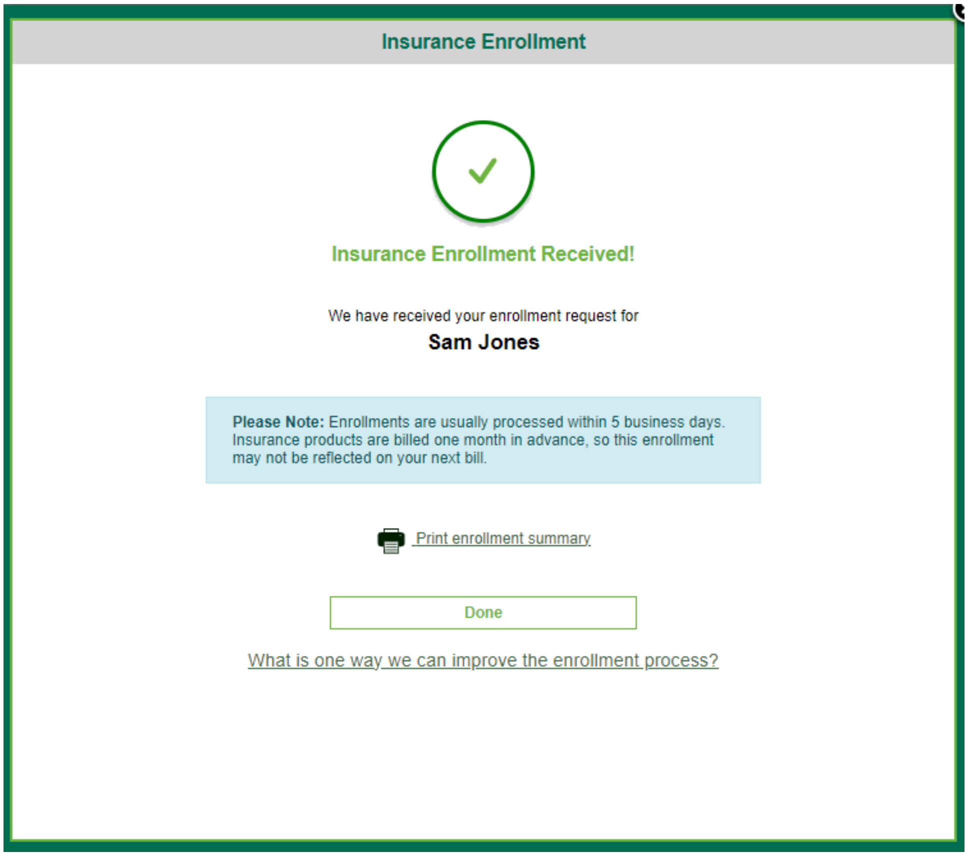


STEP 7: Review and confirm the enrollment information is correct, then click “Submit”.



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	

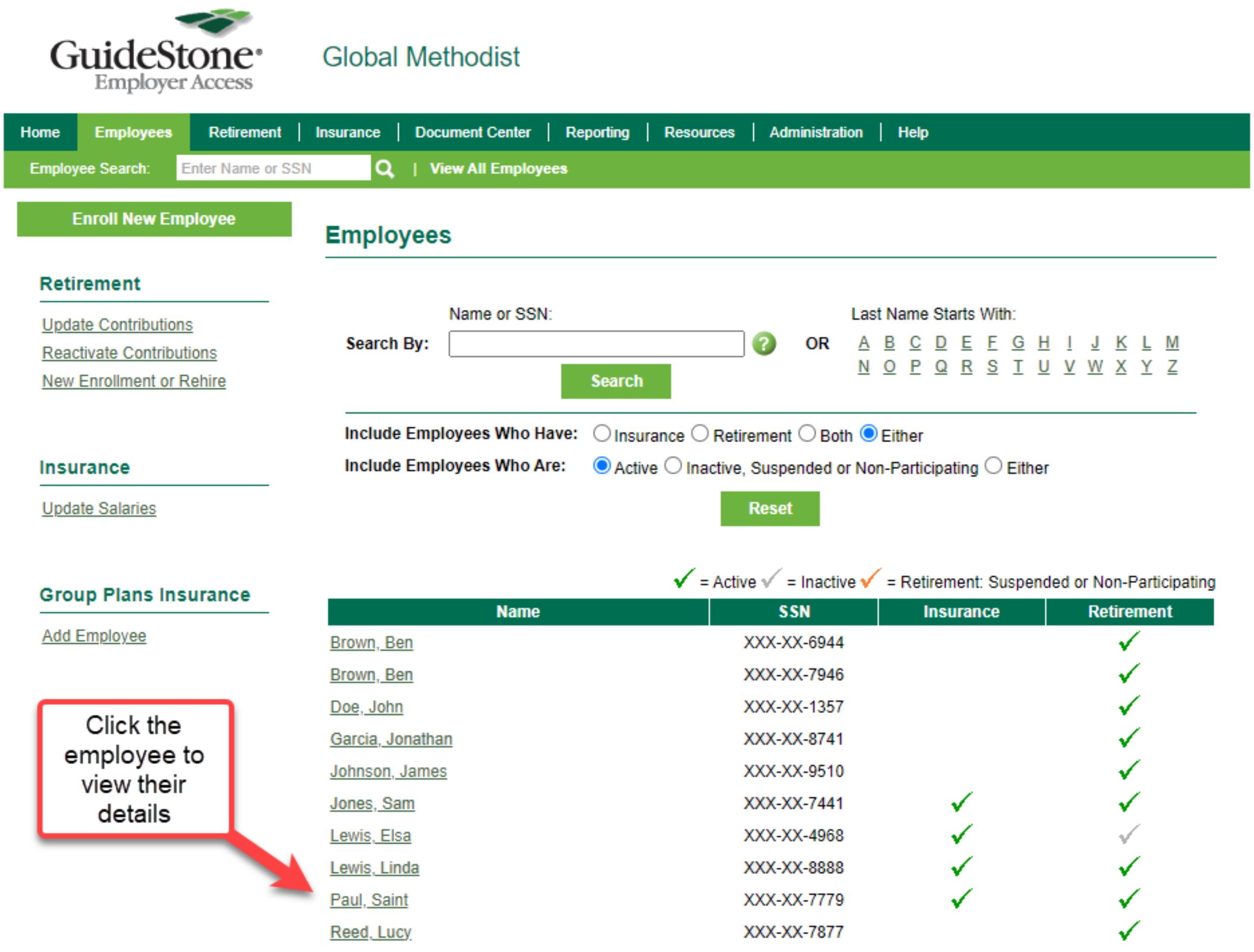
You have completed your employee's enrollment into the health and life plans.



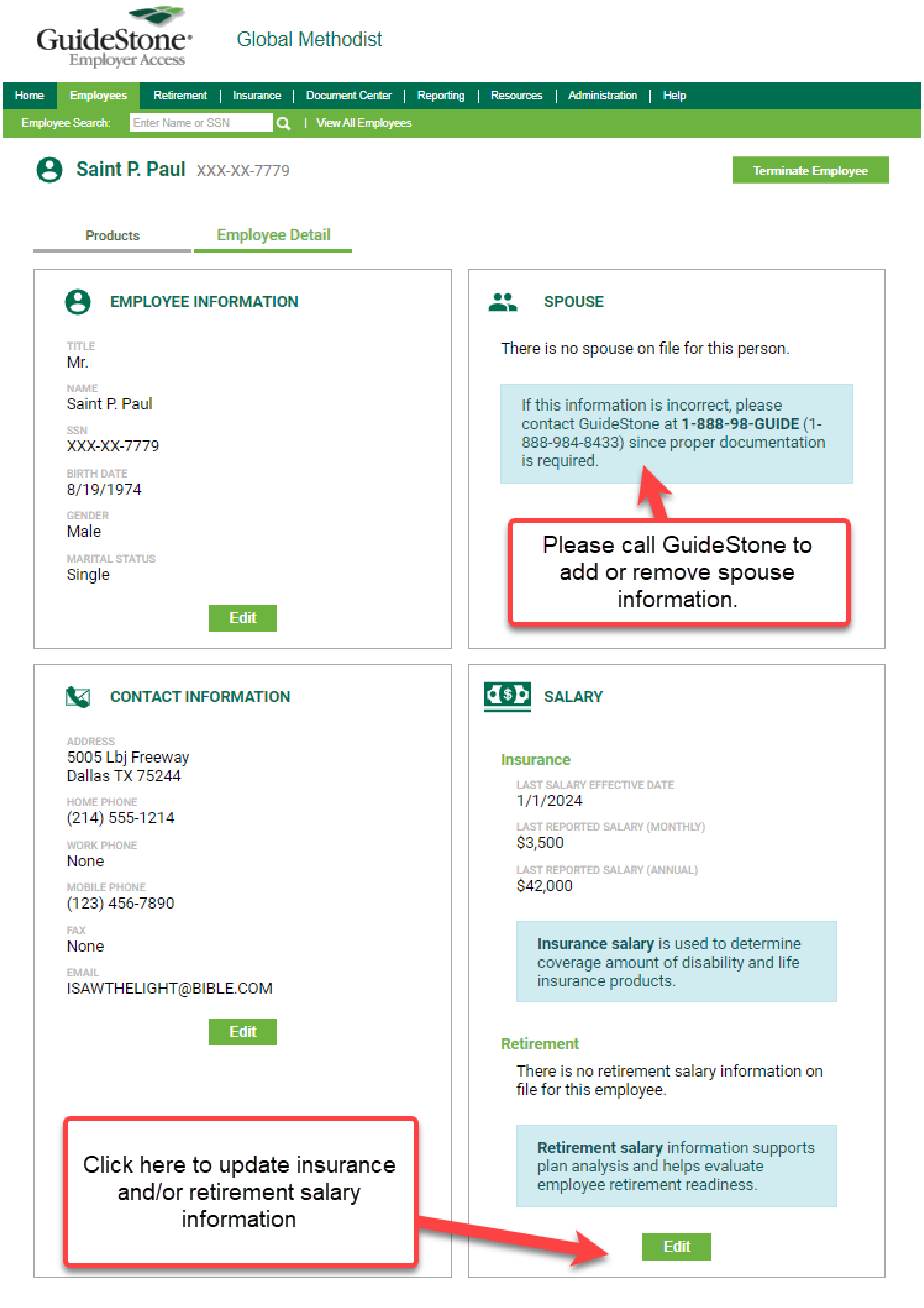
Employees Tab

View/Update Employee Information

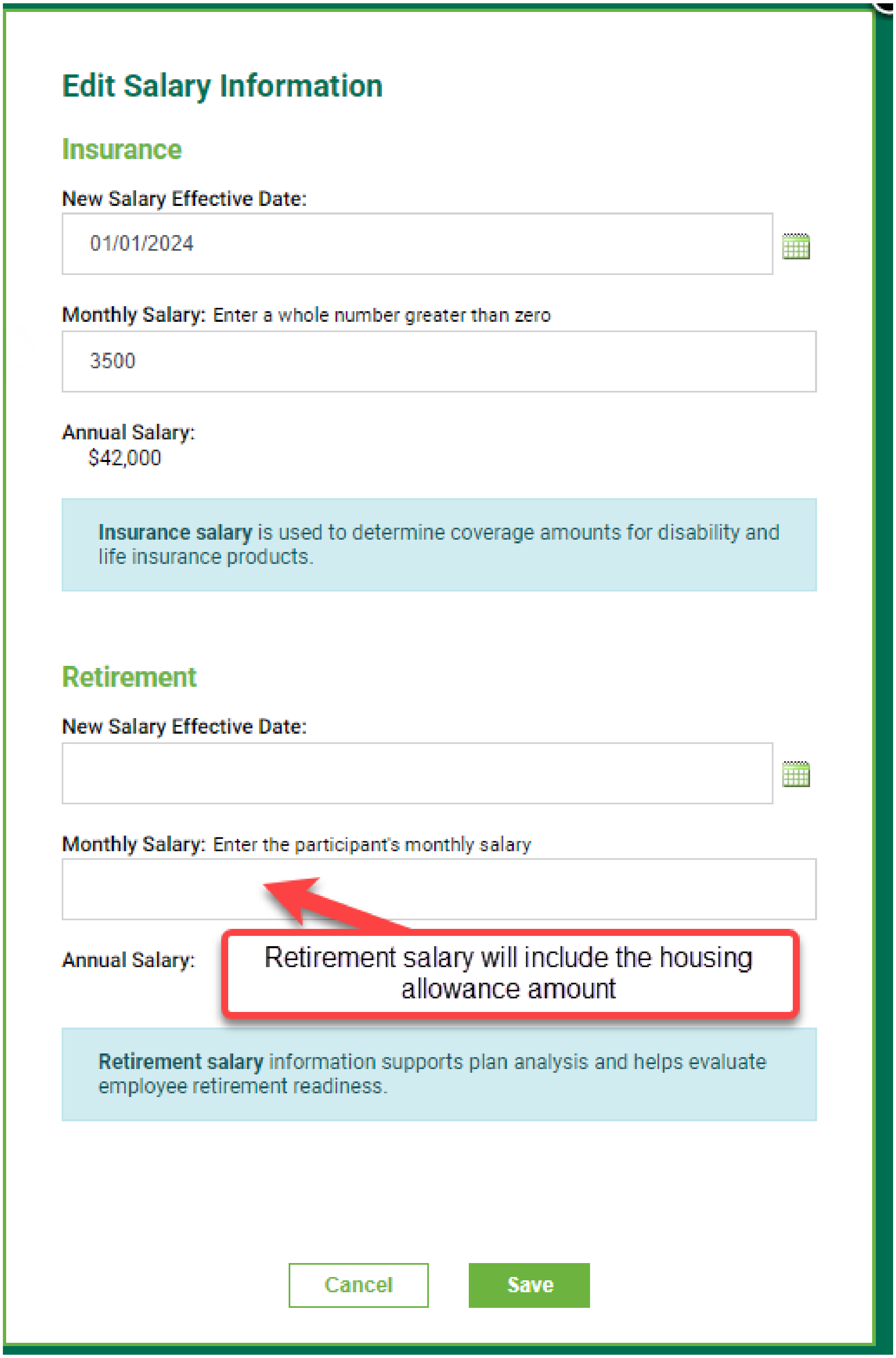
STEP 1: On the **Employees** tab, click on the employee's name.



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

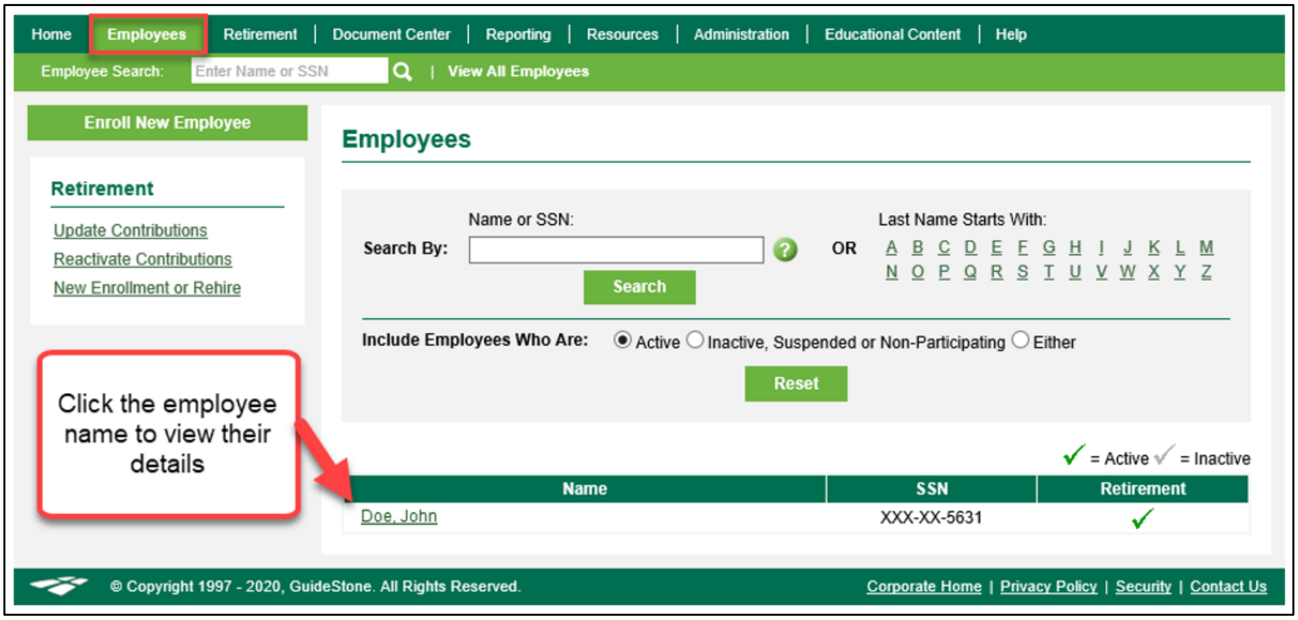


When you update the salary information, the salary amount may vary depending on if the clergy has housing allowance. The insurance amount is typically the W2 amount, however the retirement amount will have their base salary plus housing allowance. Click “Save”.

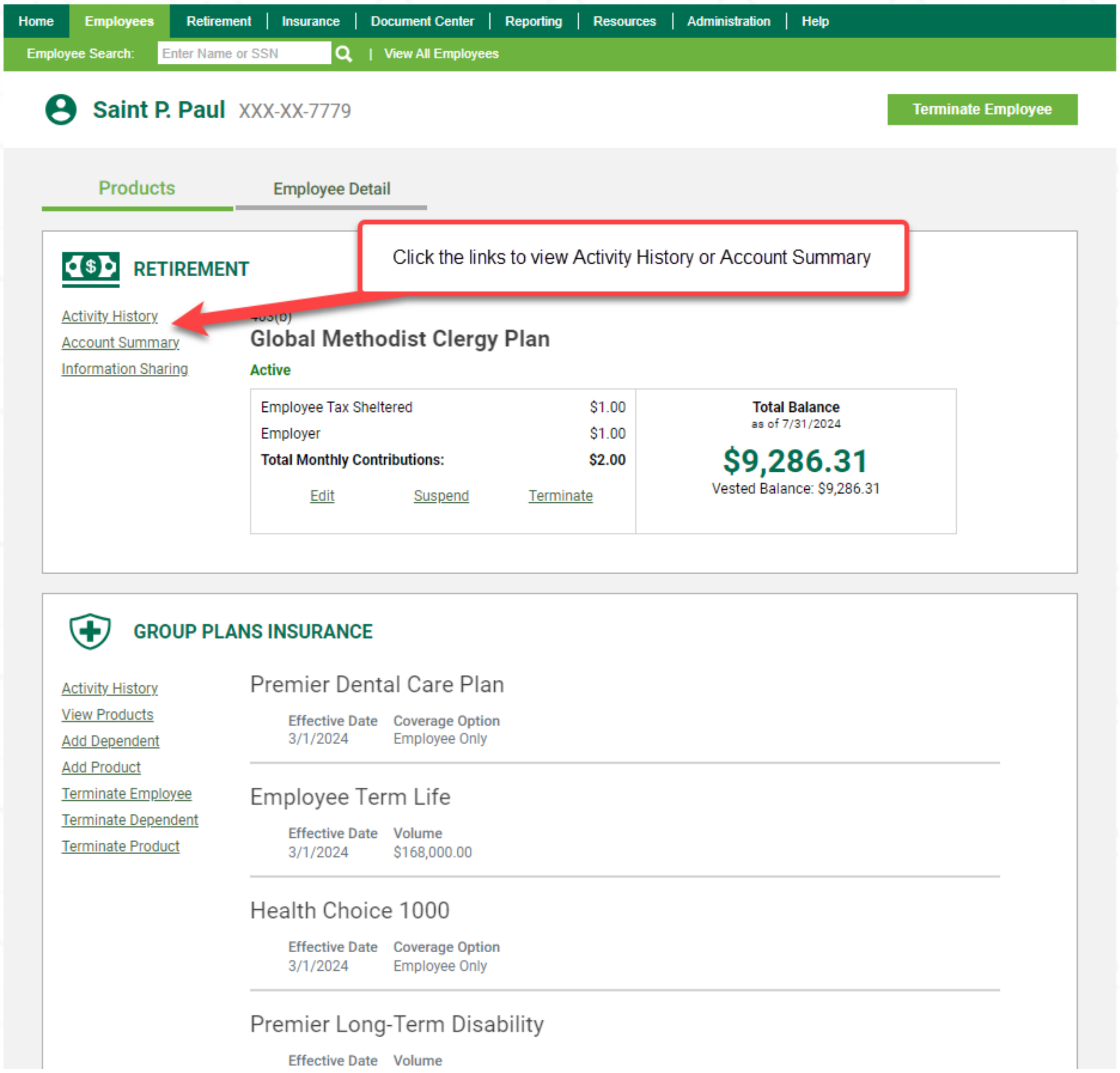


Employee’s Account History

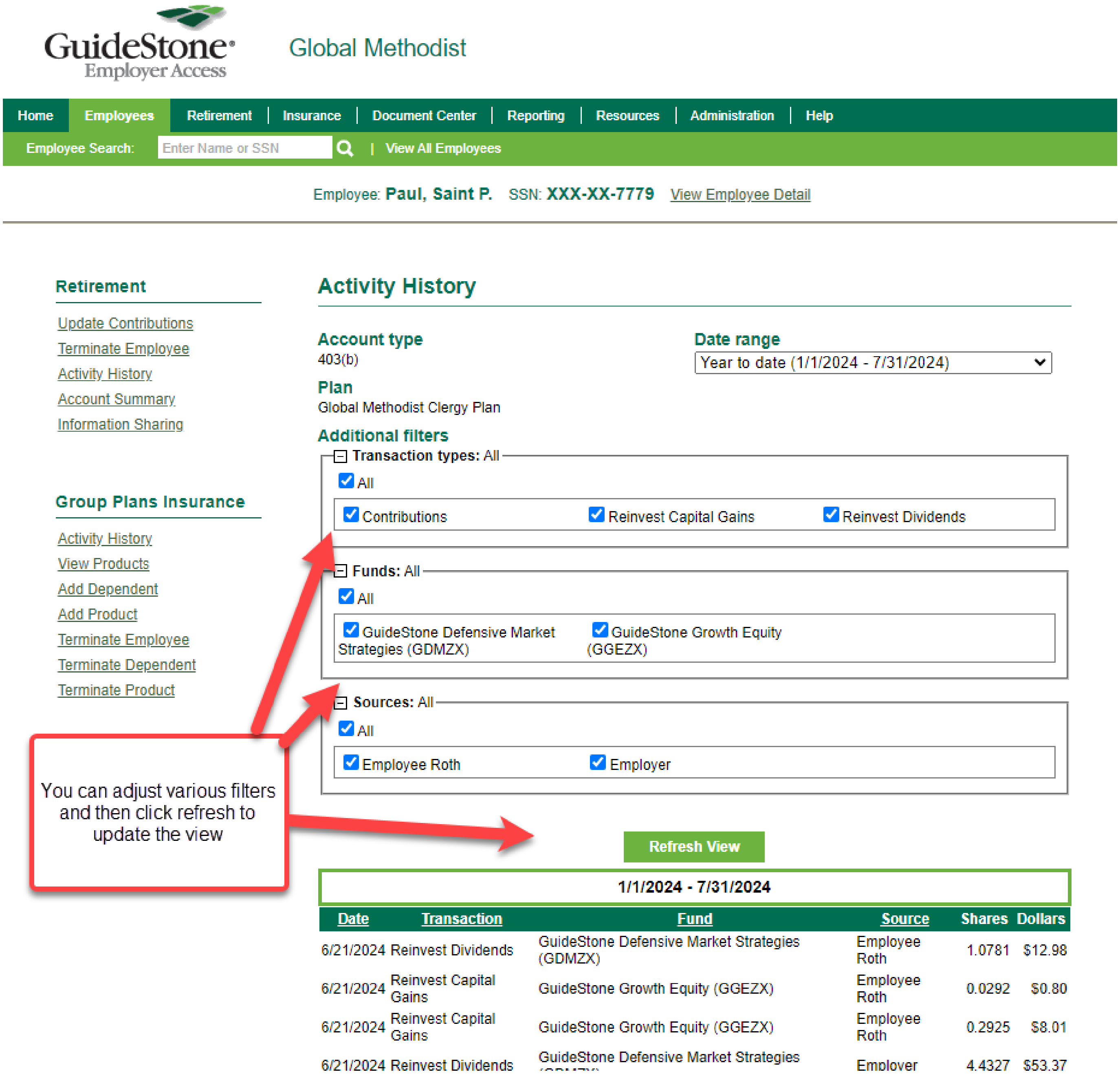
STEP 1: On the **Employees** tab, click on the employee’s name.



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

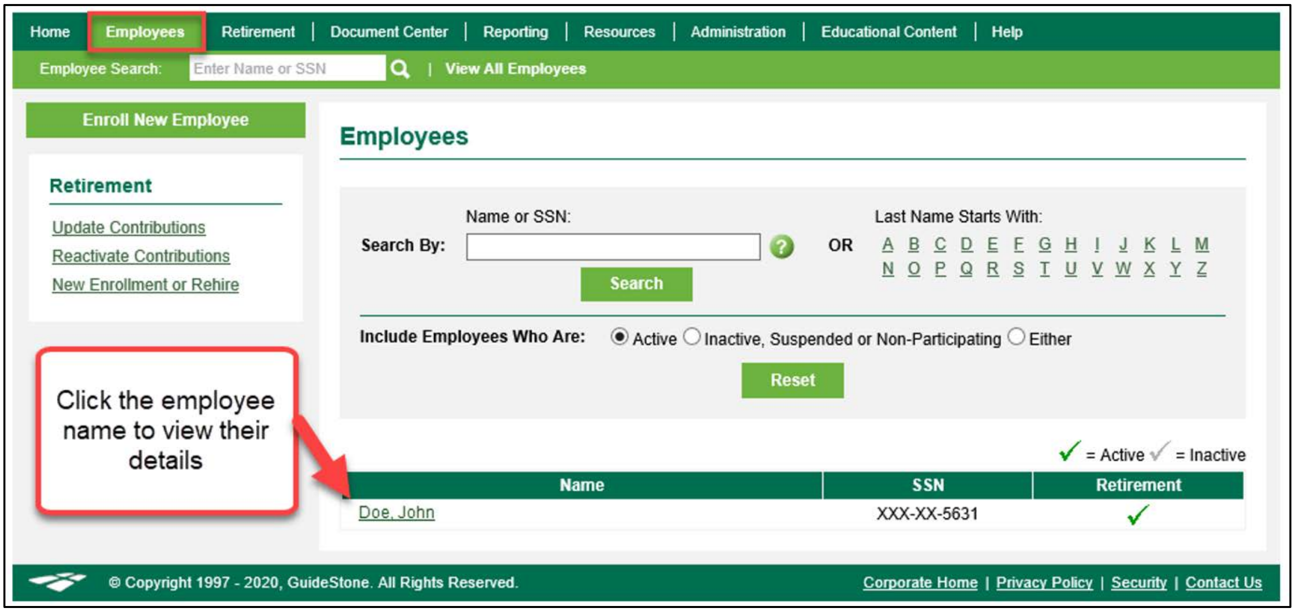


STEP 3: You will see all current transactions. To filter further, change the Date Range, Transaction Type or Source. Then click the "Refresh View" button.

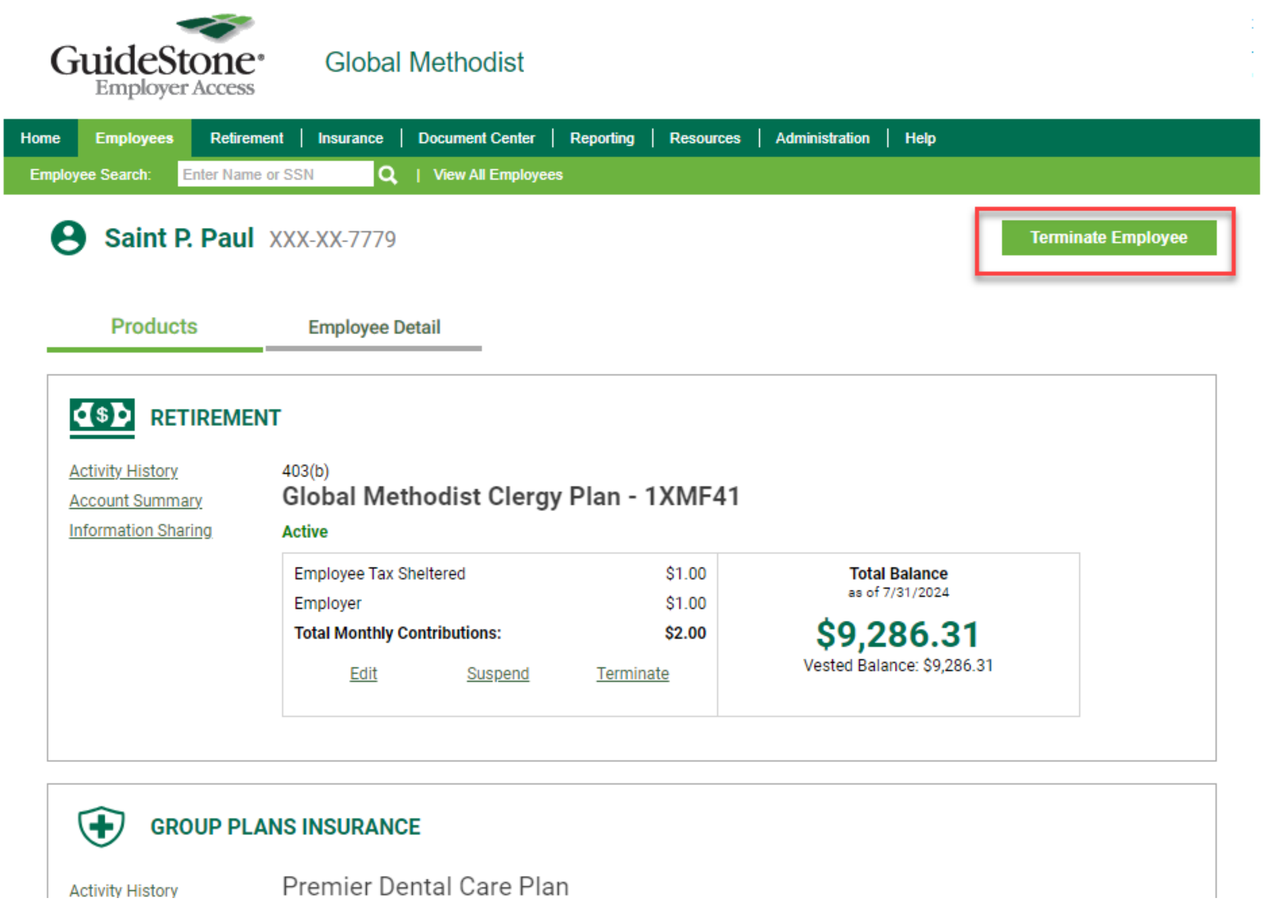


Terminate an Employee

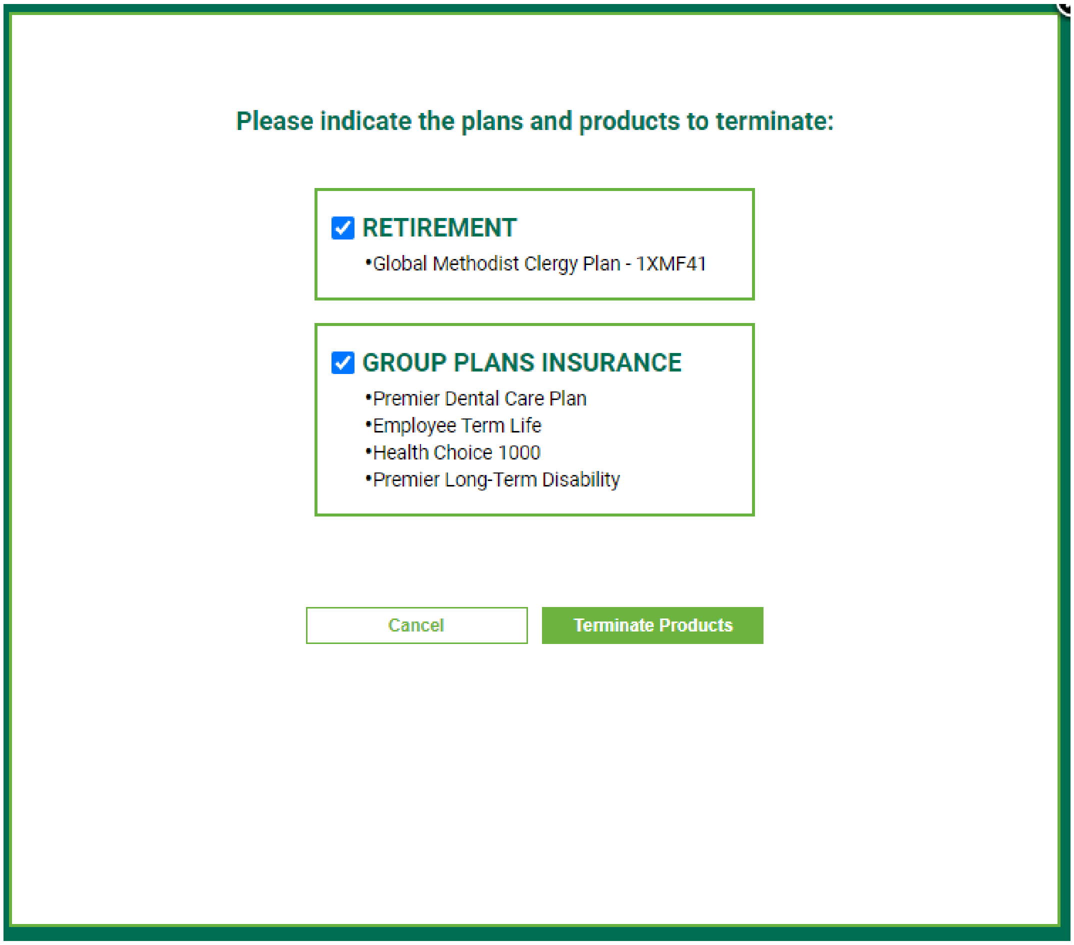
STEP 1: On the **Employees** tab, click on the employee's name.



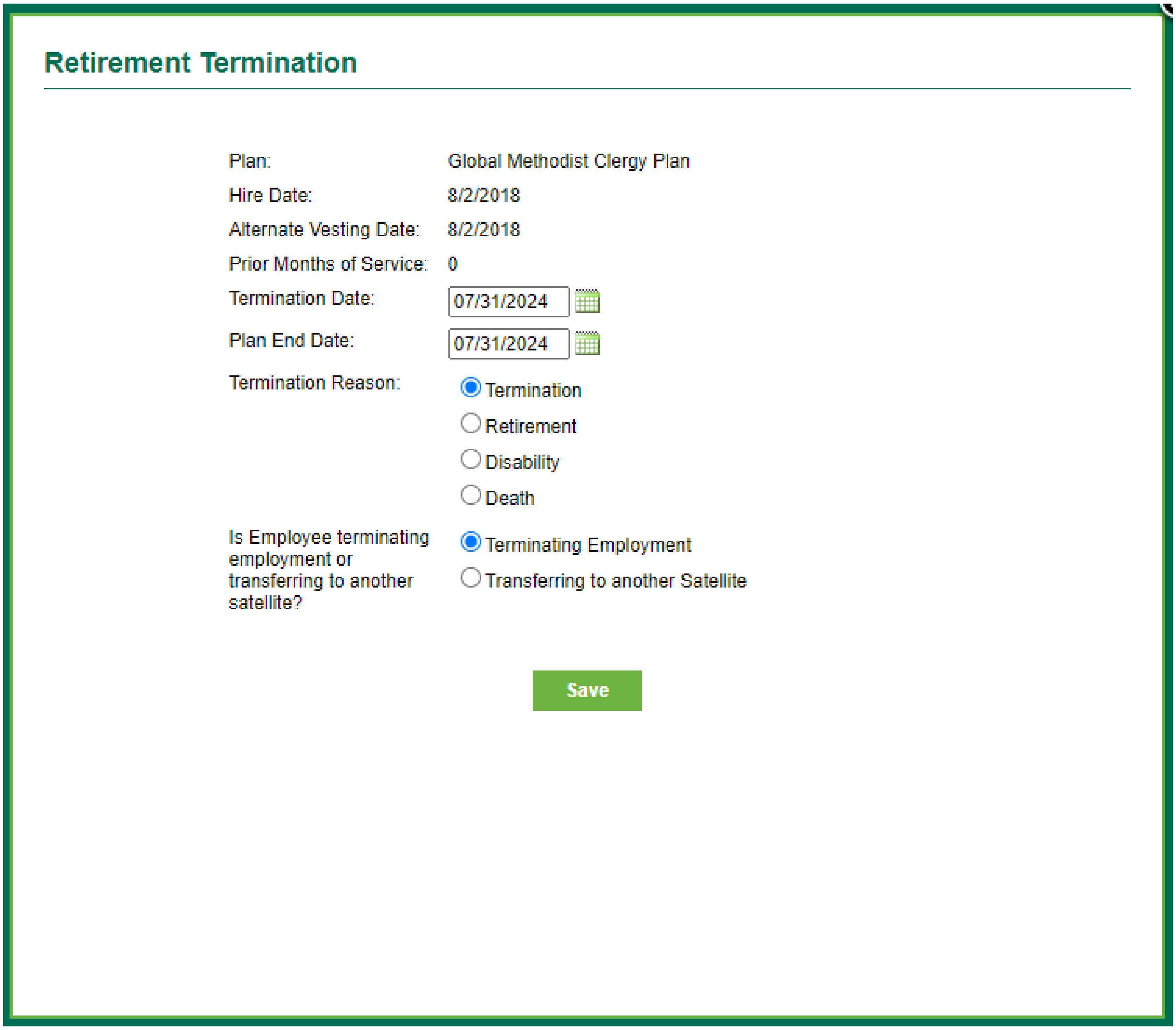
STEP 2: Click the "Terminate Employee" button.



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

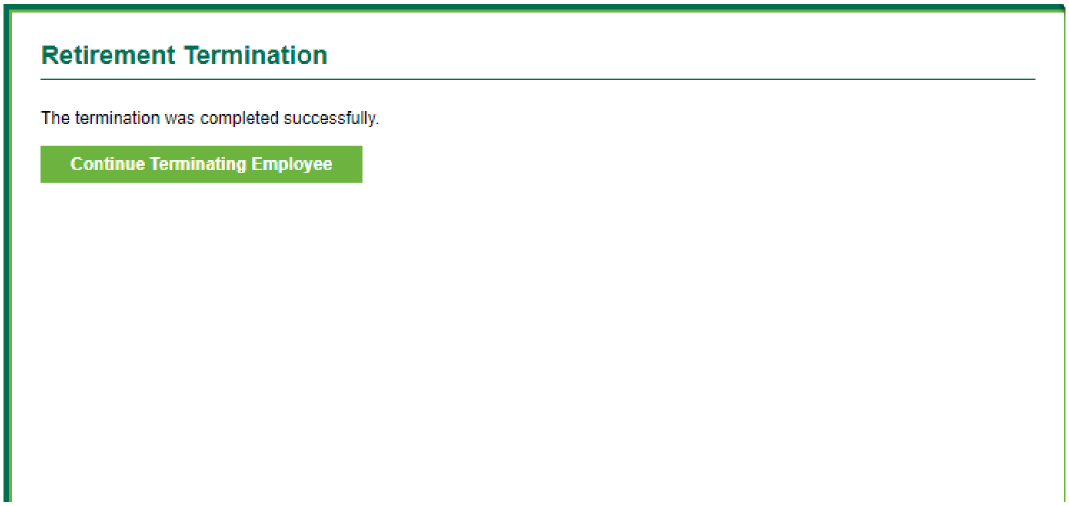


STEP 4: Input the employee's Termination Date for the Retirement Plan (date employee severed service with the employer) and the Plan End Date (the date of the last contributions the employer will send in on behalf of the employee). Select the Termination Reason, then click the "Save" button.

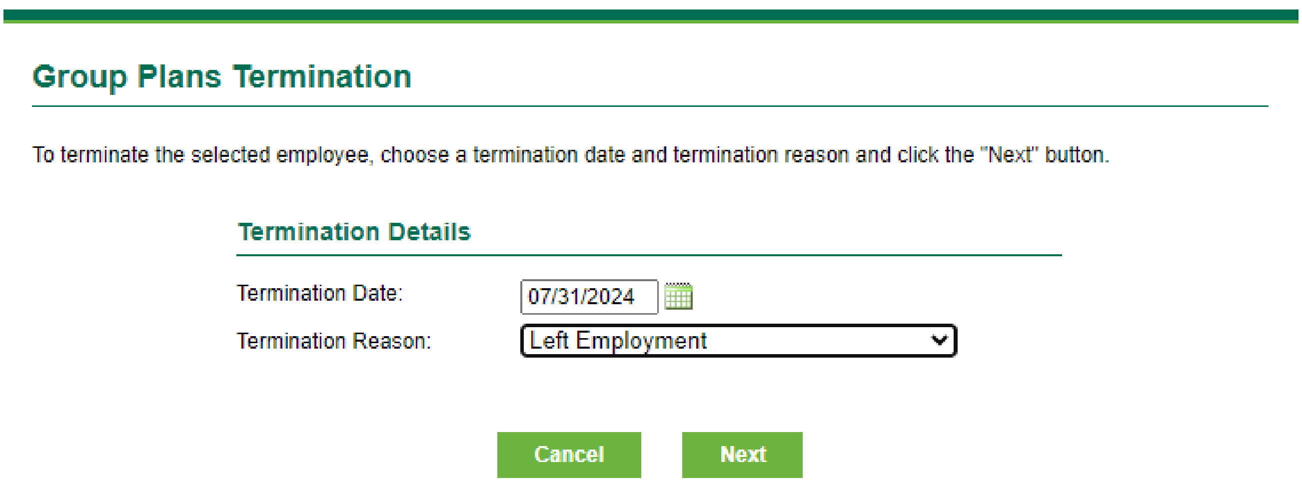


Example: An employee terminates employment with the church on 1/19/xx. However, the date of the employee's last contribution will be remitted for the pay period ending 1/31/xx. Therefore, the employee's Termination Date will equal 1/19/xx and their Plan End Date will equal 1/31/xx.

Once you complete the retirement termination, click “Continue Terminating Employee”



STEP 5: Input the employee’s Termination Date for the Insurance Plan and select the Termination Reason, then click the “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

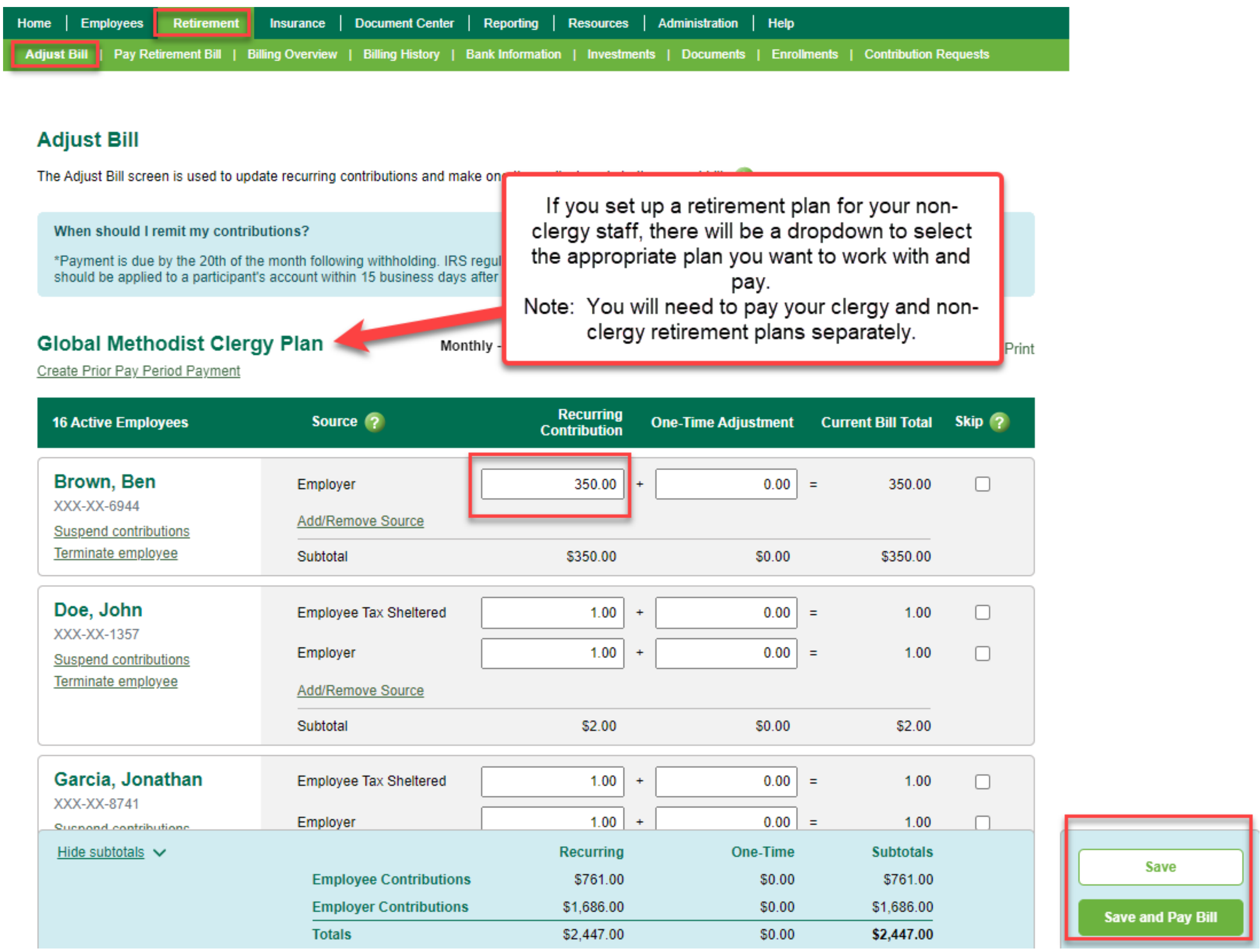
Retirement Tab

Edit Contribution Amounts

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

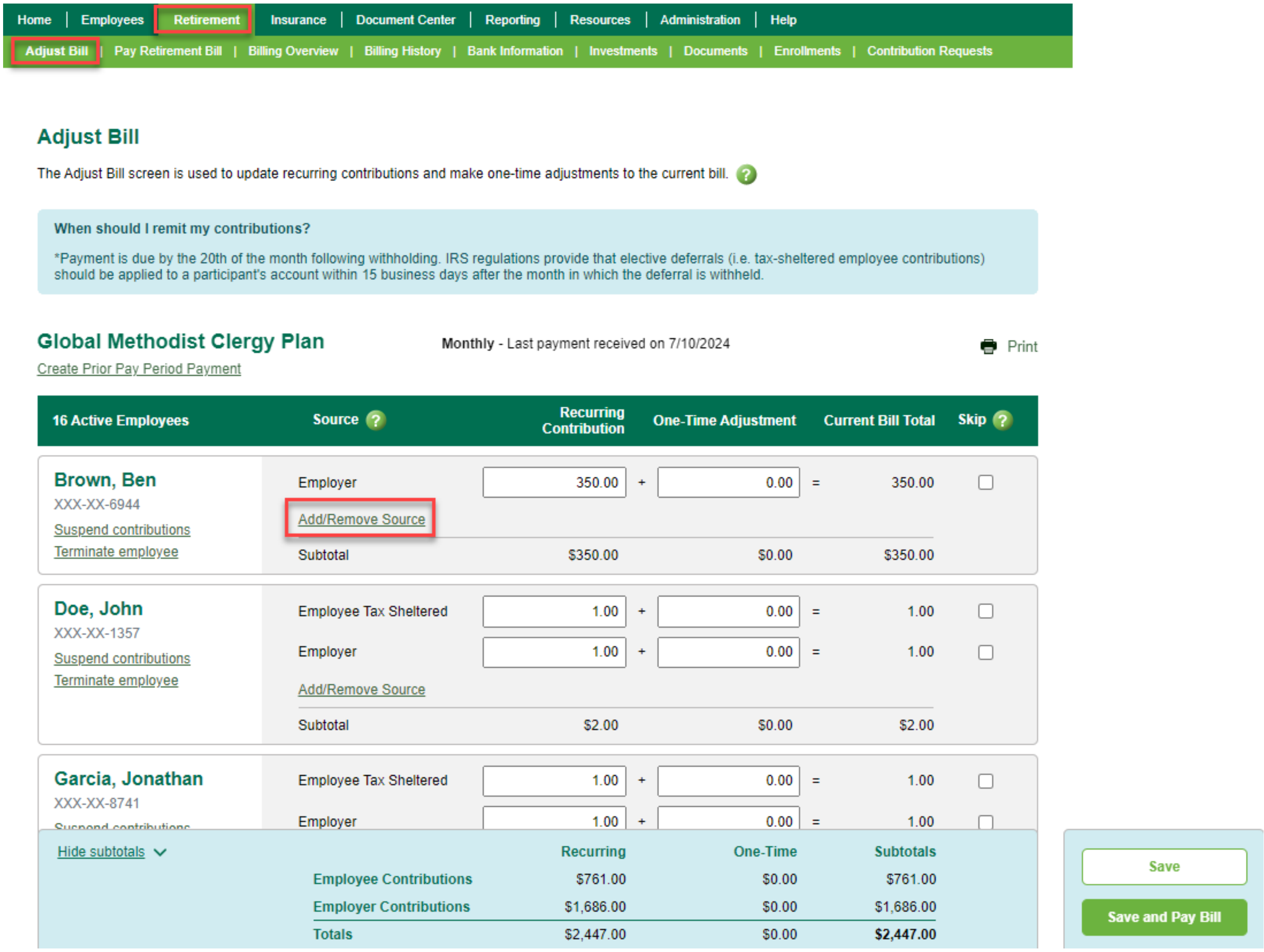
If the change in contribution is due to a change in the employee’s salary, you can update the salary by accessing the employee on the **Employees** tab.

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

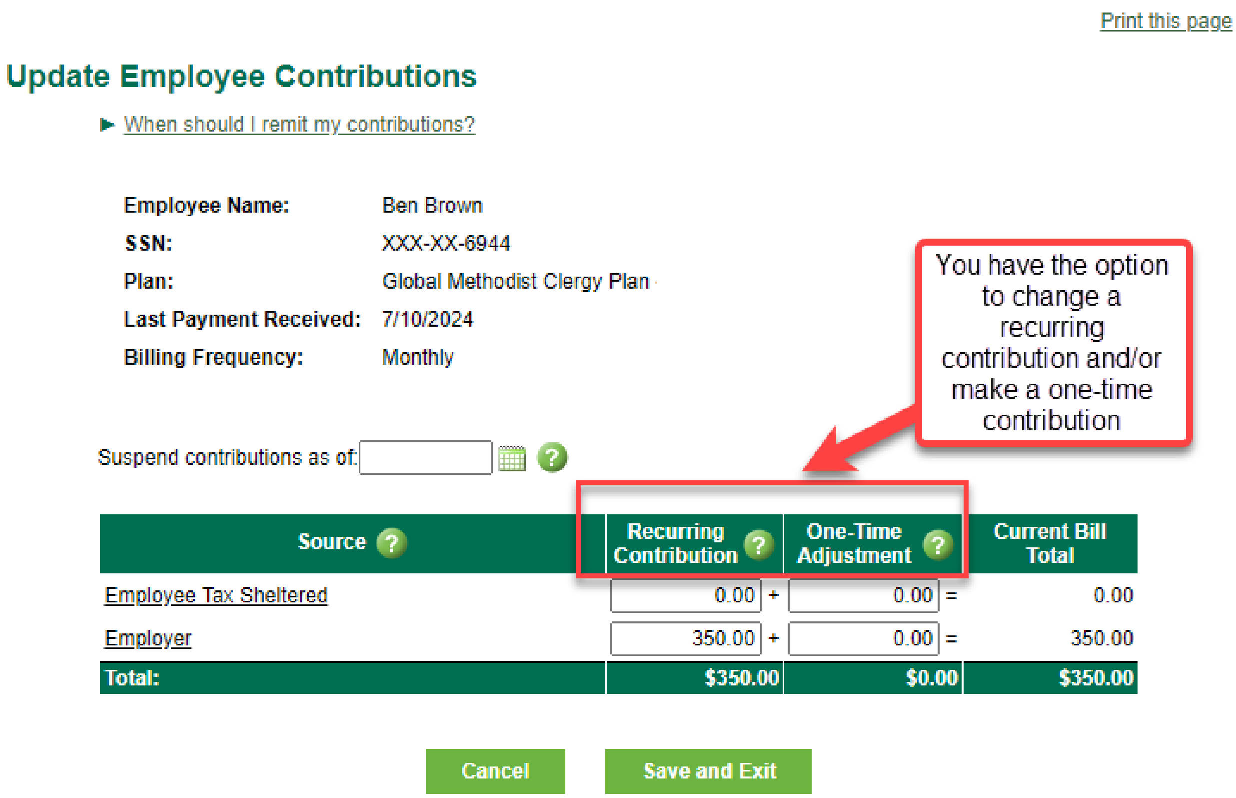


Add or Remove a Contribution Source

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.



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.

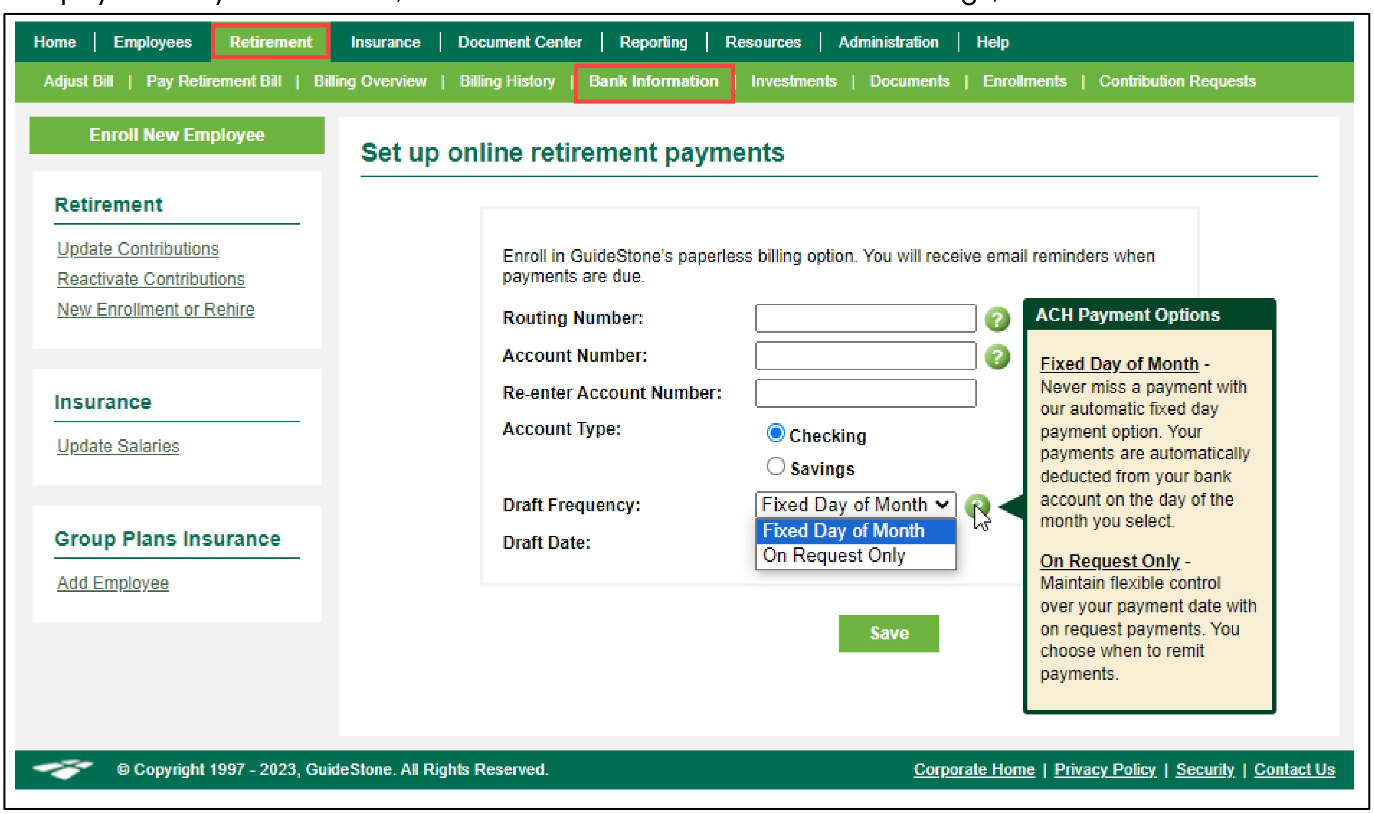
STEP 2: Enter the church's Routing and Account information.
**Note: banking information cannot be entered for a specific employee. The routing and account number must belong to the church.*

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.

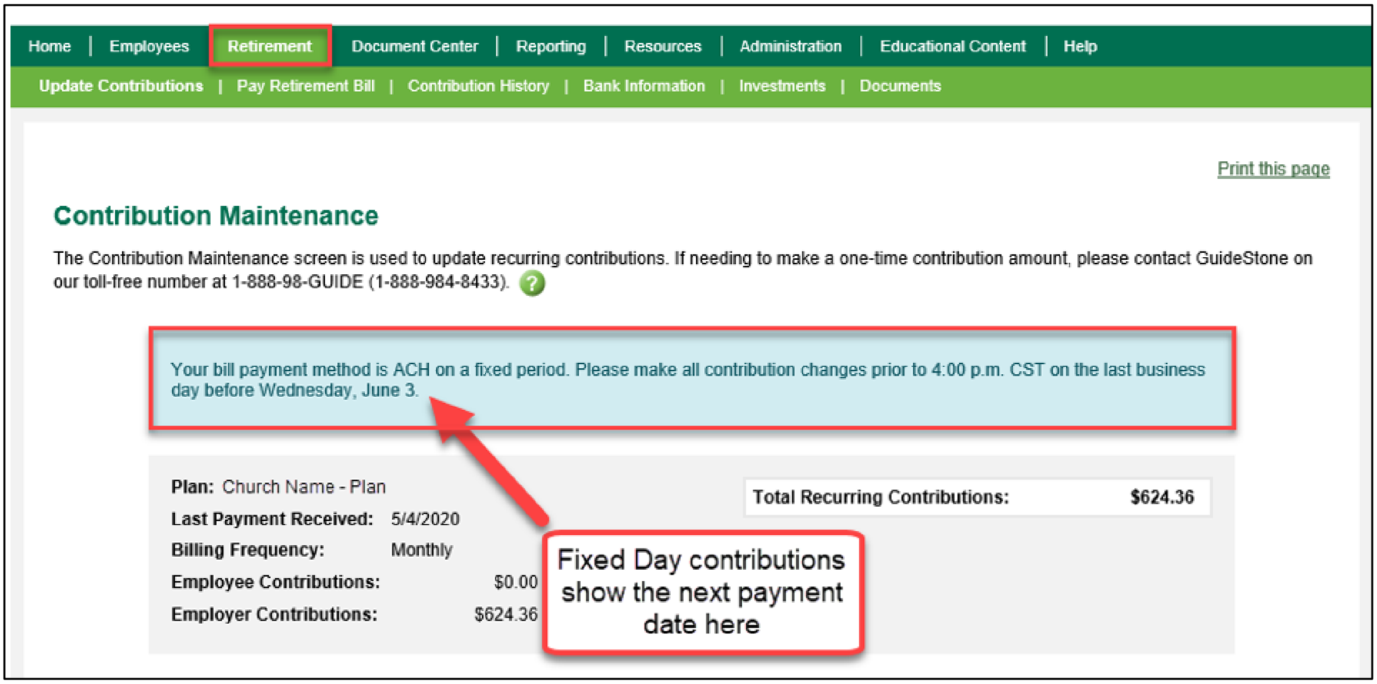
STEP 4: Click "Save".

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.

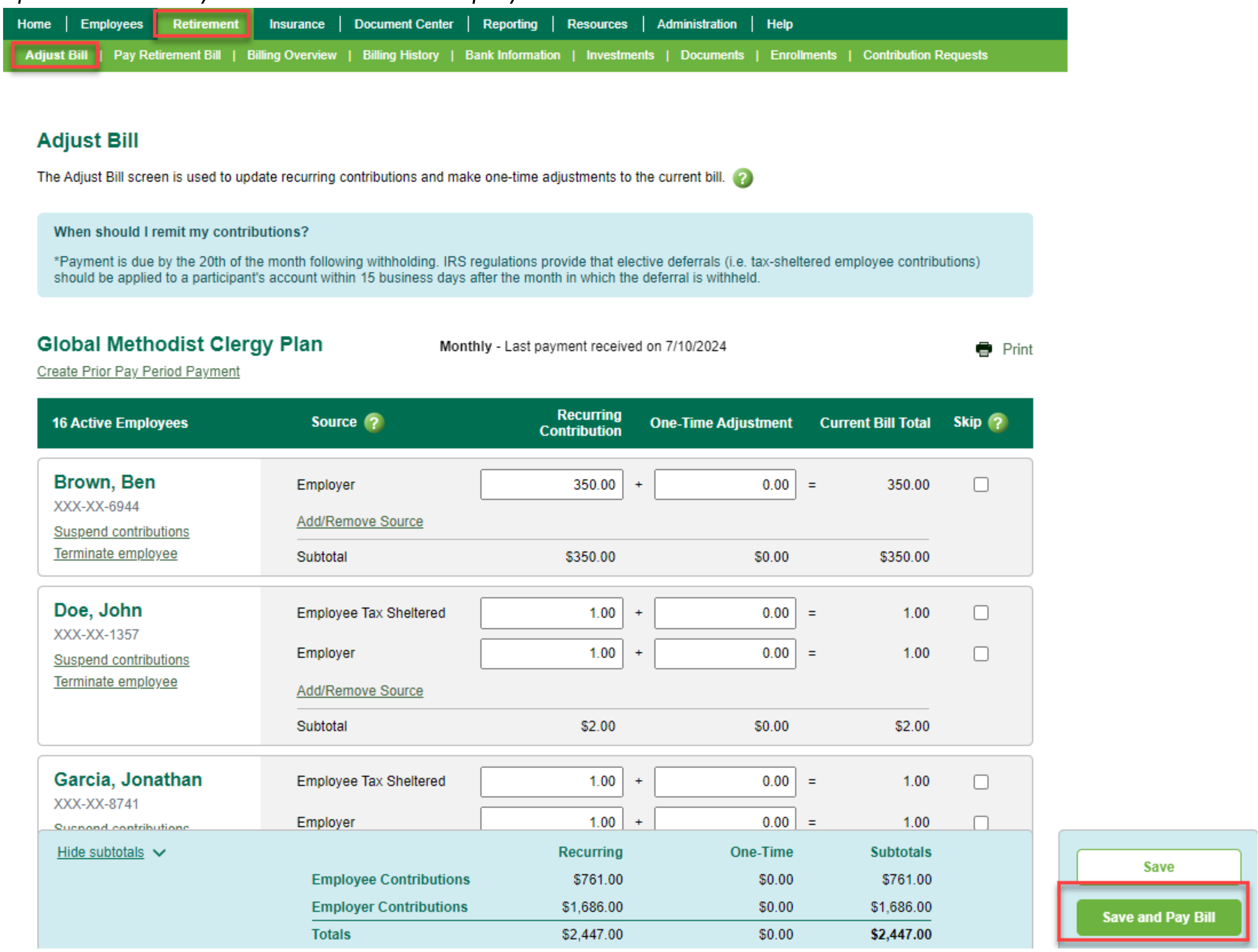


Make an On Request Contribution Payment

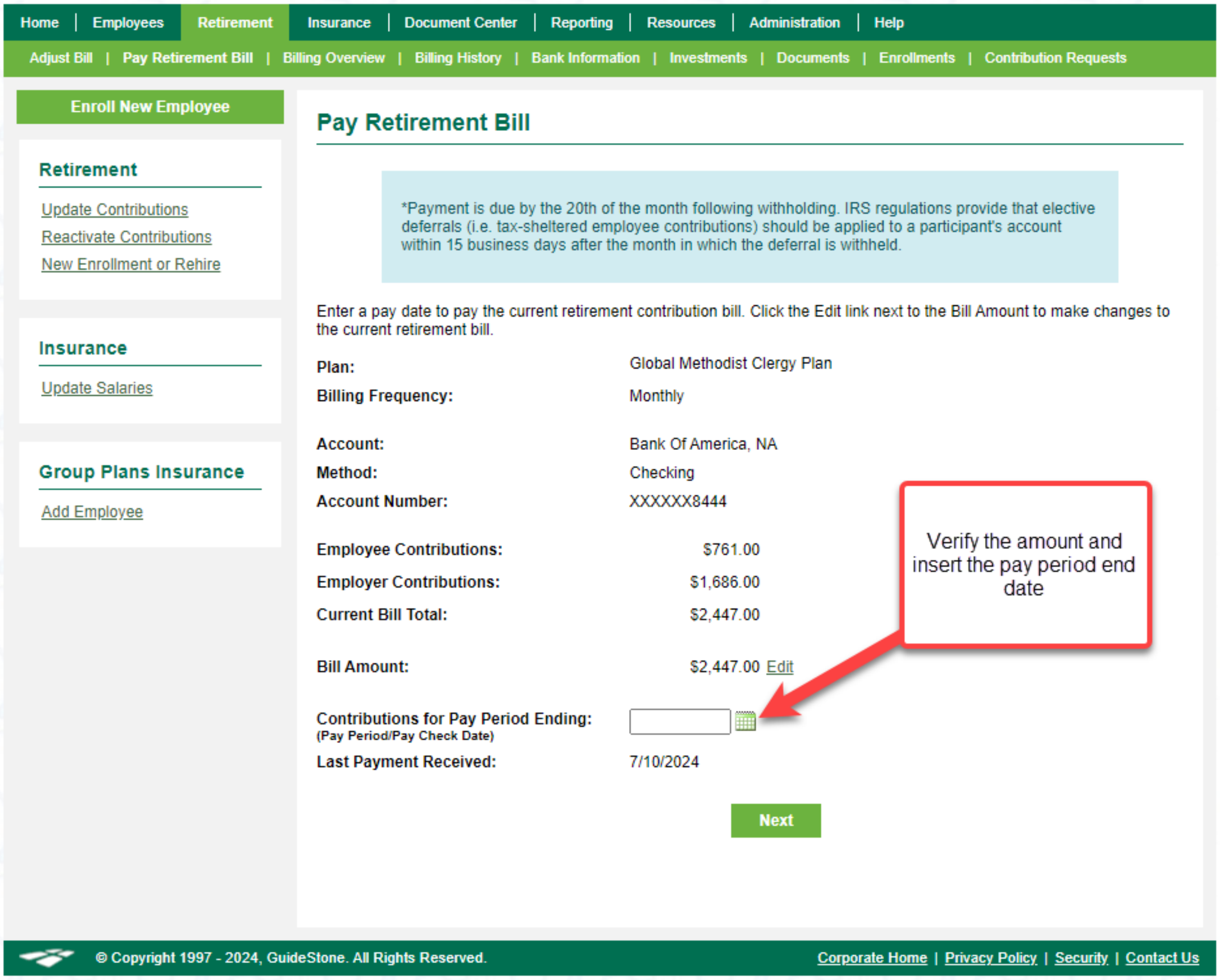
Contributions for "On Request" payments will need to be *initiated* when the church is ready to make a payment.

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".

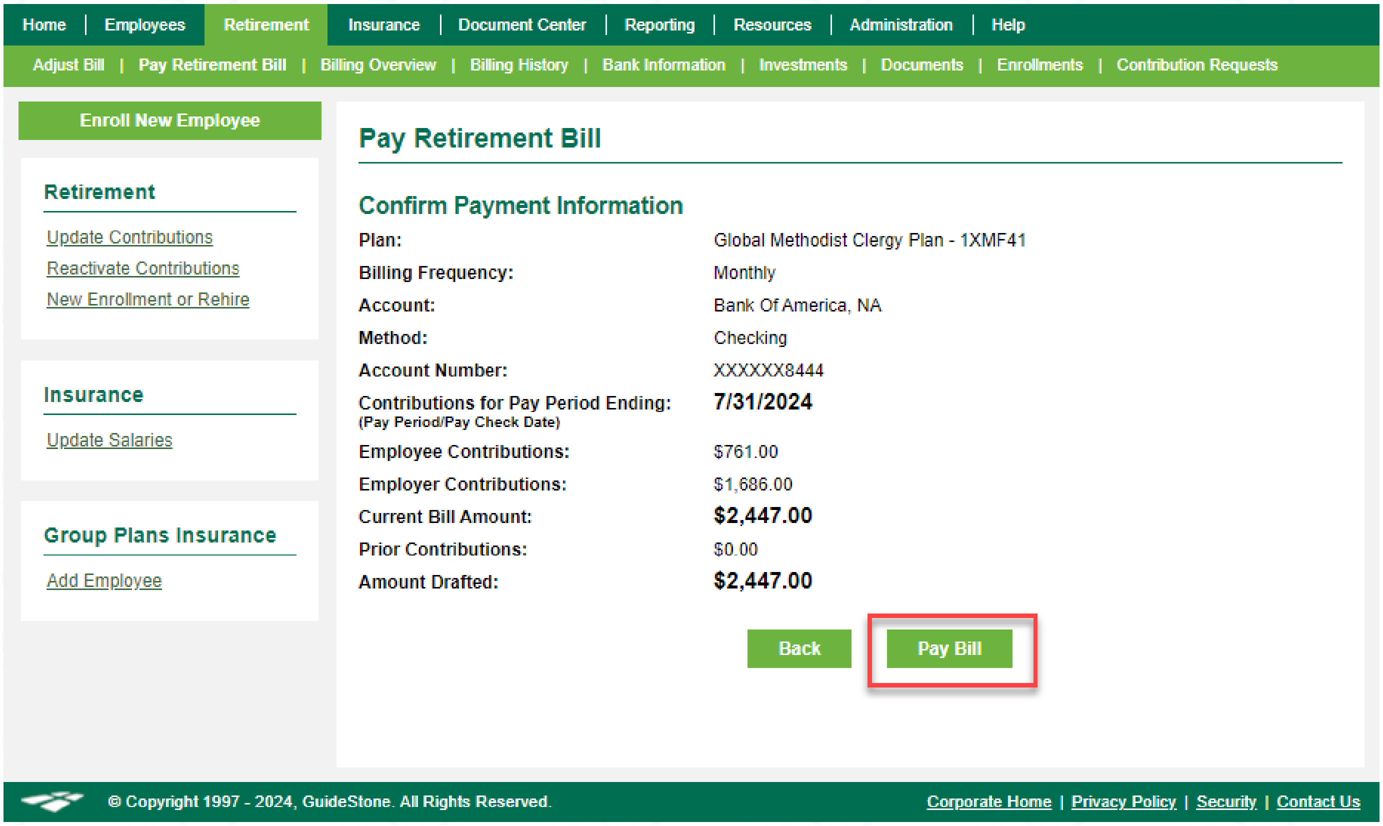
Note: if the contribution amount changes because there was a change in salary, don't forget to update the Salary information in the Employee Detail section.



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



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.



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:

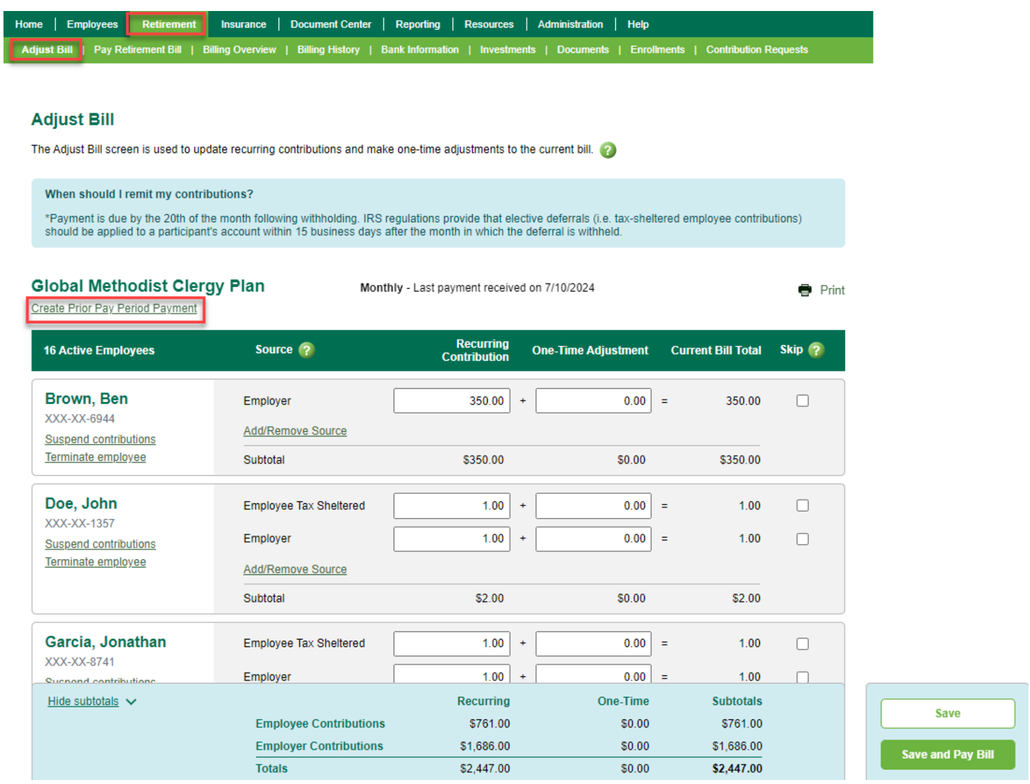
Option 1: If you discovered you missed a contribution for your employees for a prior pay period, simply edit the **Adjust Bill** screen with the necessary information. Then select "Save and Pay Bill". Enter the designated pay period and select "Next". From the "Confirmation Payment" screen select "Pay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

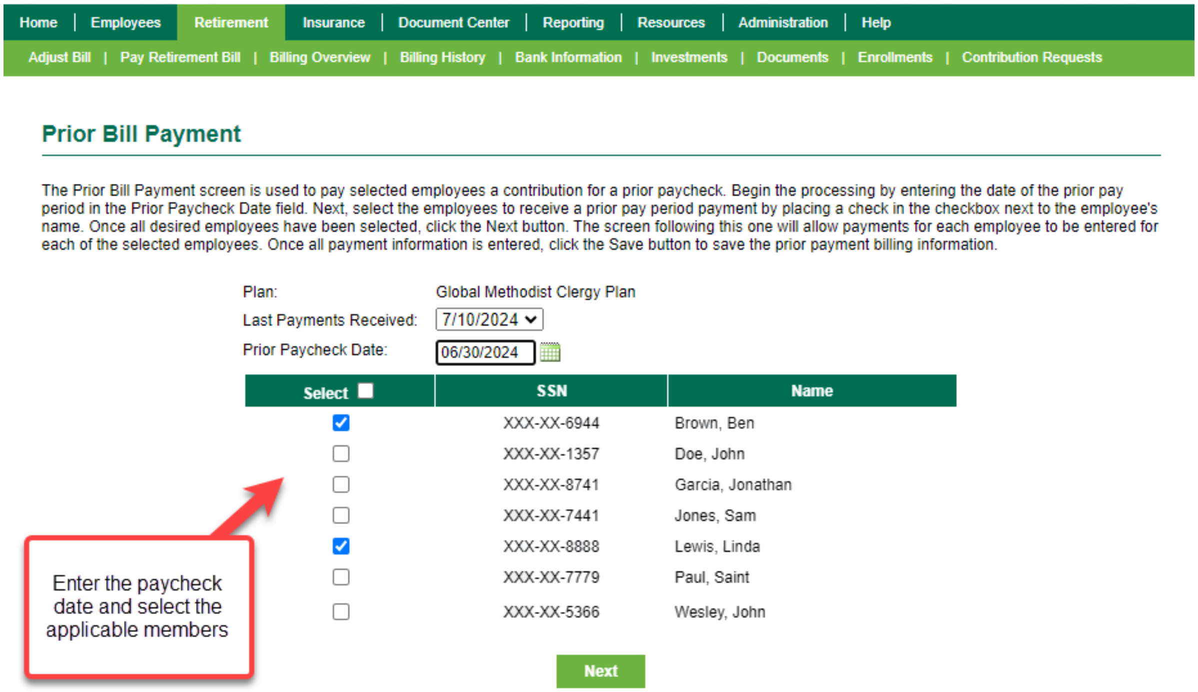
Option 2 : To process a "One-Time Catch-up" payment, you will need to create a *Prior Pay Period Payment*.

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.

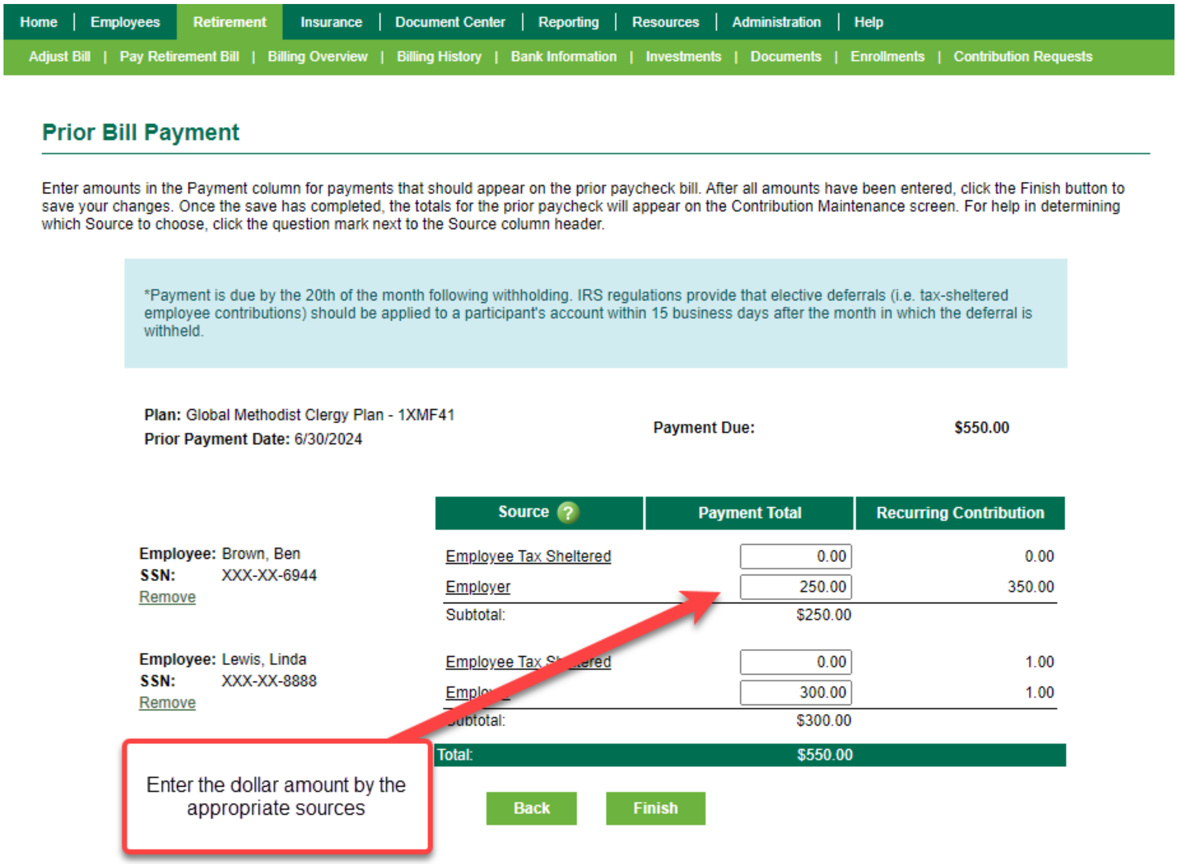
STEP 1: Select *"Create a Prior Pay Period Payment".*



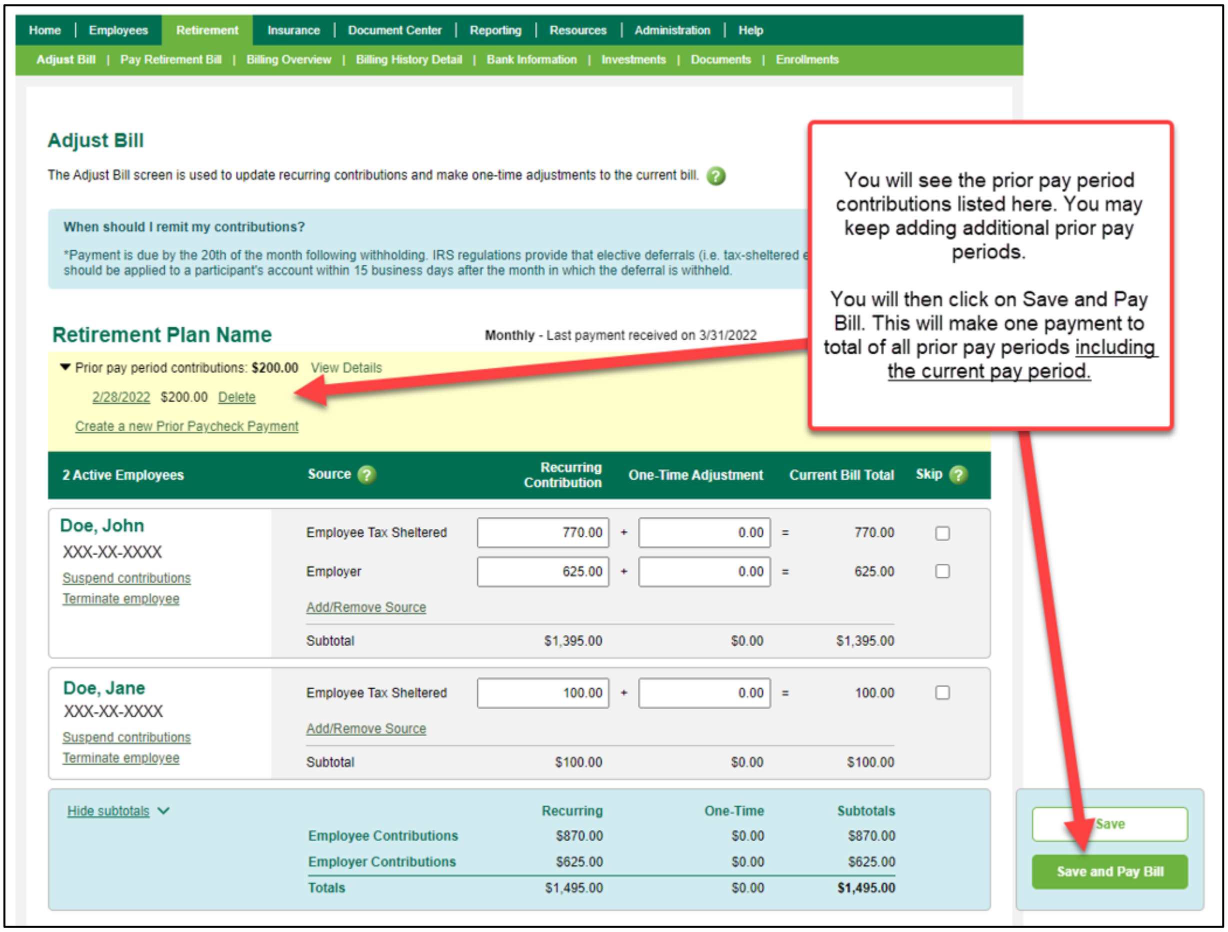
STEP 2: Input the appropriate Prior Paycheck Date and then select the appropriate employees from the list.



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



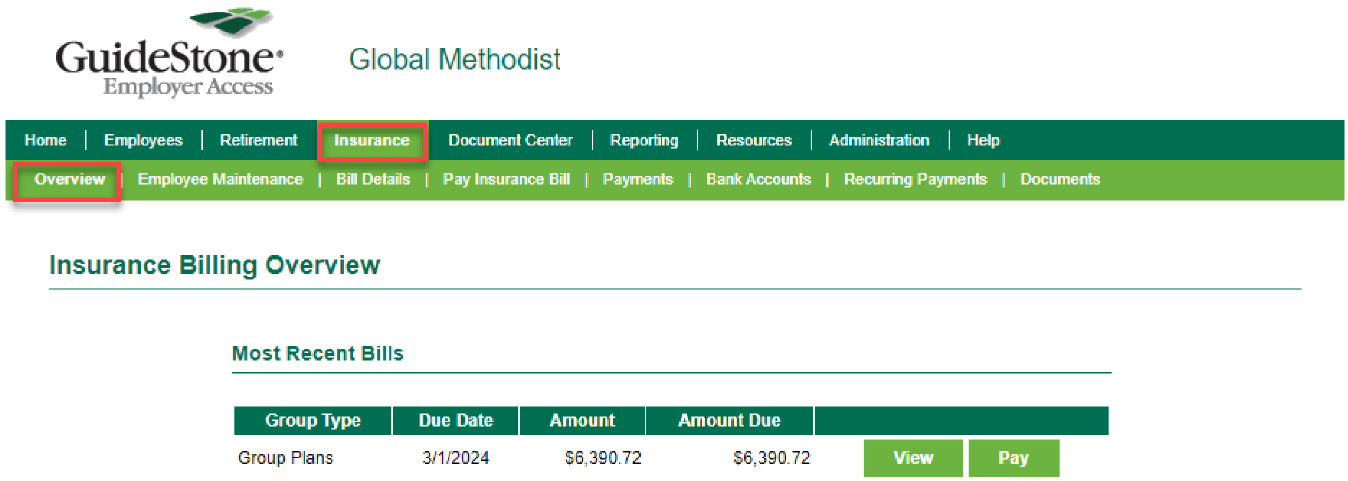
STEP 4: The Prior Paycheck Payment that was just created will populate in a yellow box near the top of the page. When you are ready to make a payment, click on "Save and Pay Bill" to pay the current and prior payments all at once.



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

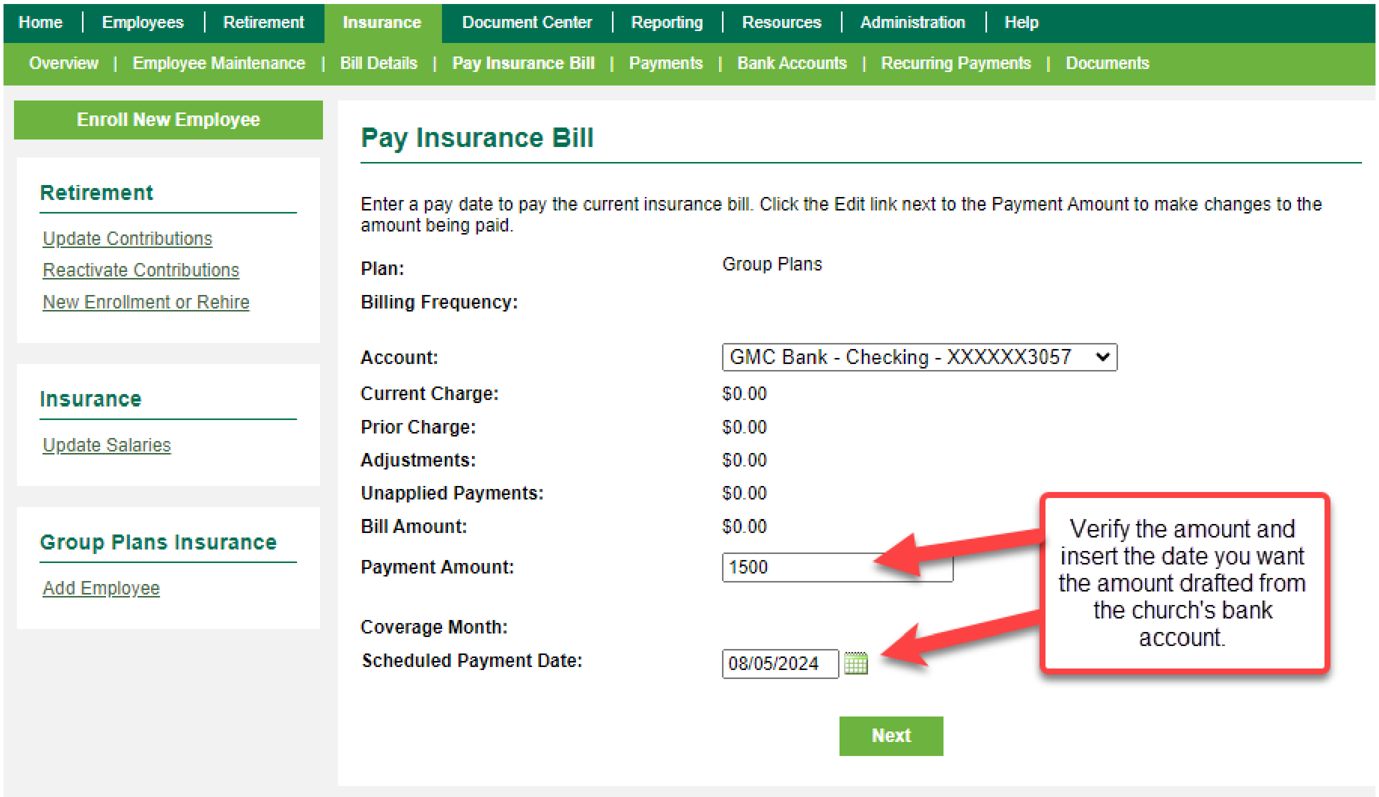
Details By Category

Product Descriptions

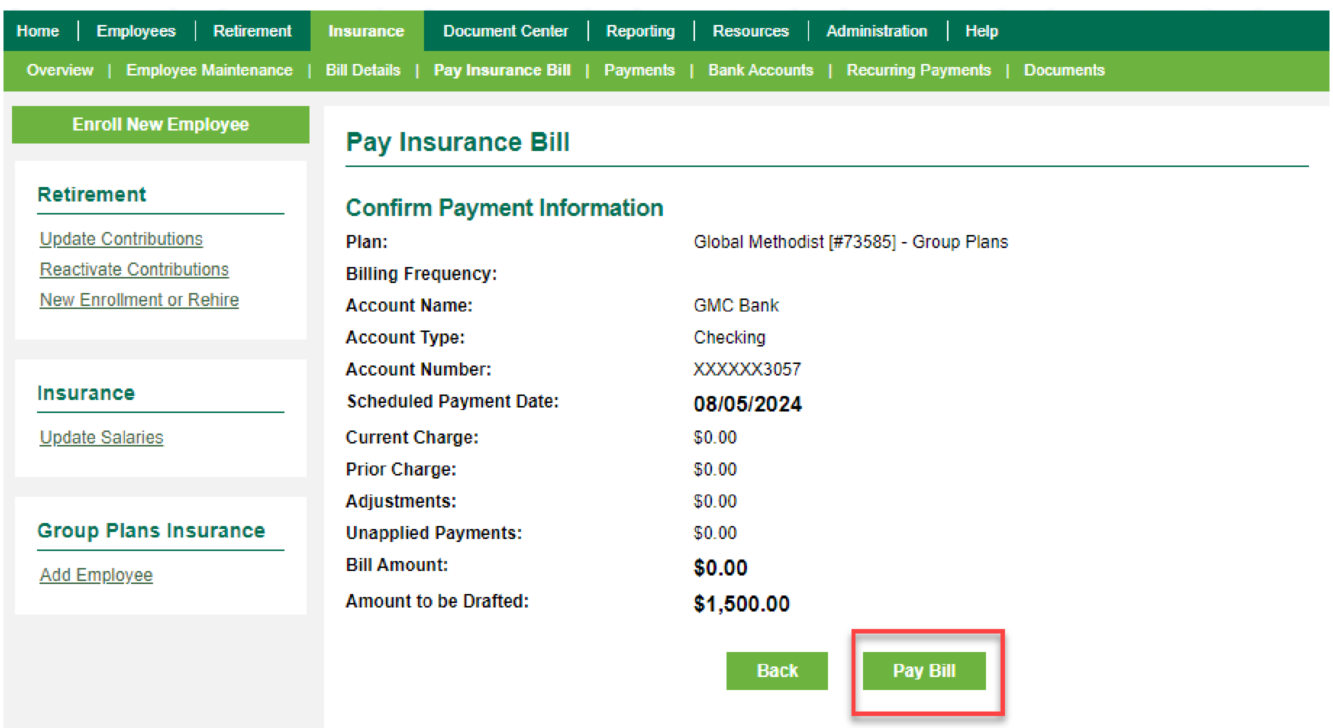
Participant Name	Birth Date	SSN	Salary	Product	Coverage	Participant Charge	Dependent Charge	Total Charge
LEWIS, ELSA	1/1/2000	XXX-XX-4968	$5,000.00					
				AD&D	$20,000.00	$0.50	$0.00	$0.50
				DENTPR		$39.93	$59.90	$99.83
				ELIFE	$20,000.00	$0.80	$0.00	$0.80
				HHC1000		$1,000.00	$1,500.00	$2,500.00
				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".

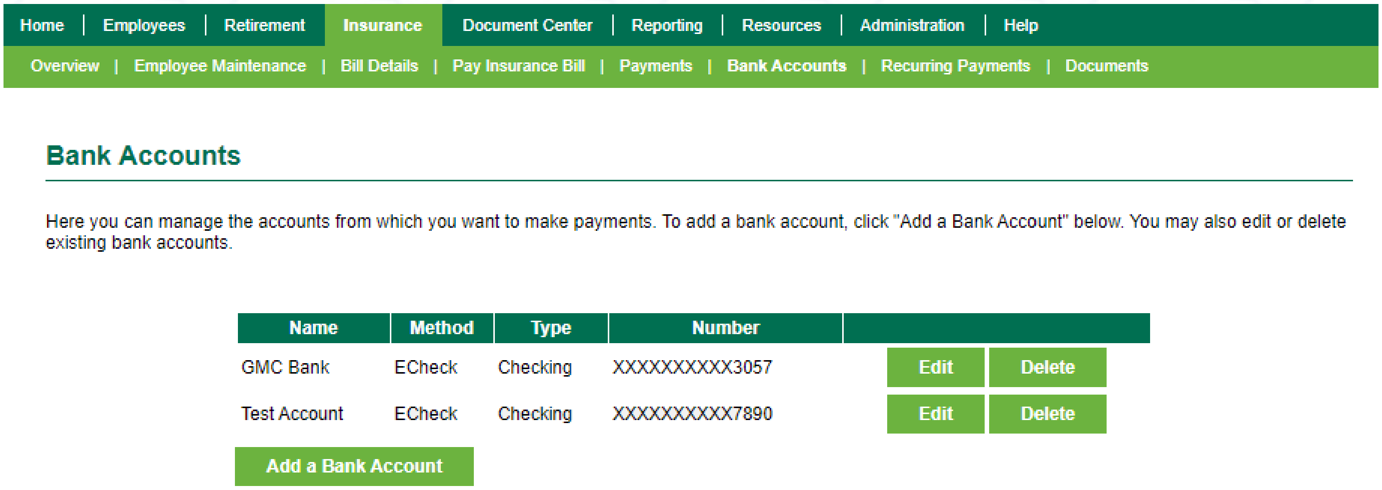


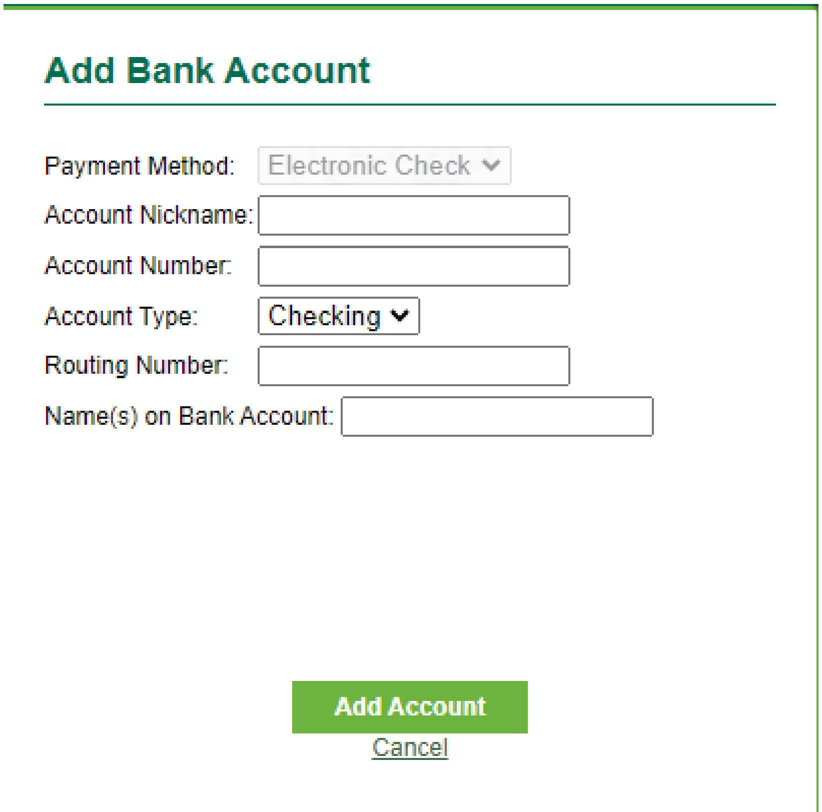
Bank Accounts

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.

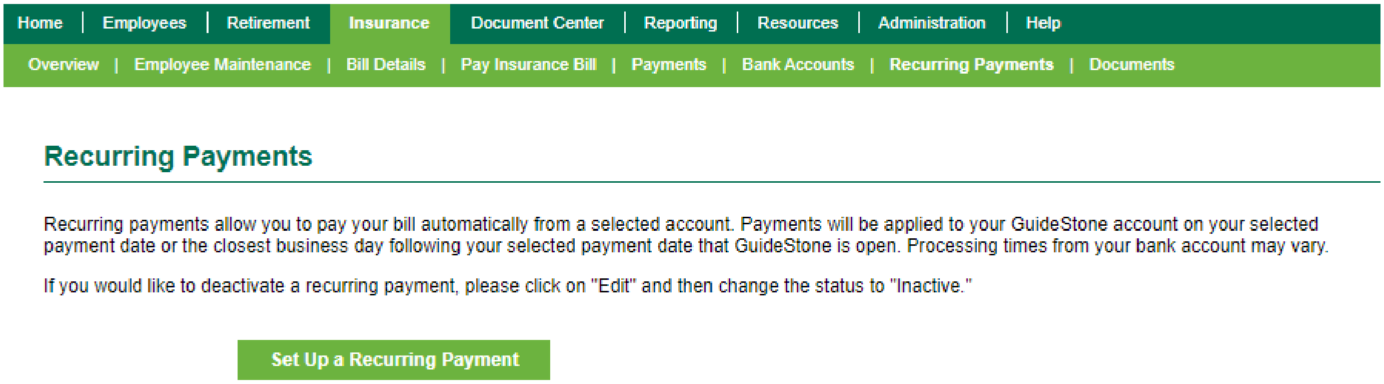
Click the "Add a Bank Account" and a separate pop up window will appear with the banking information that is needed. Click "Add Account".



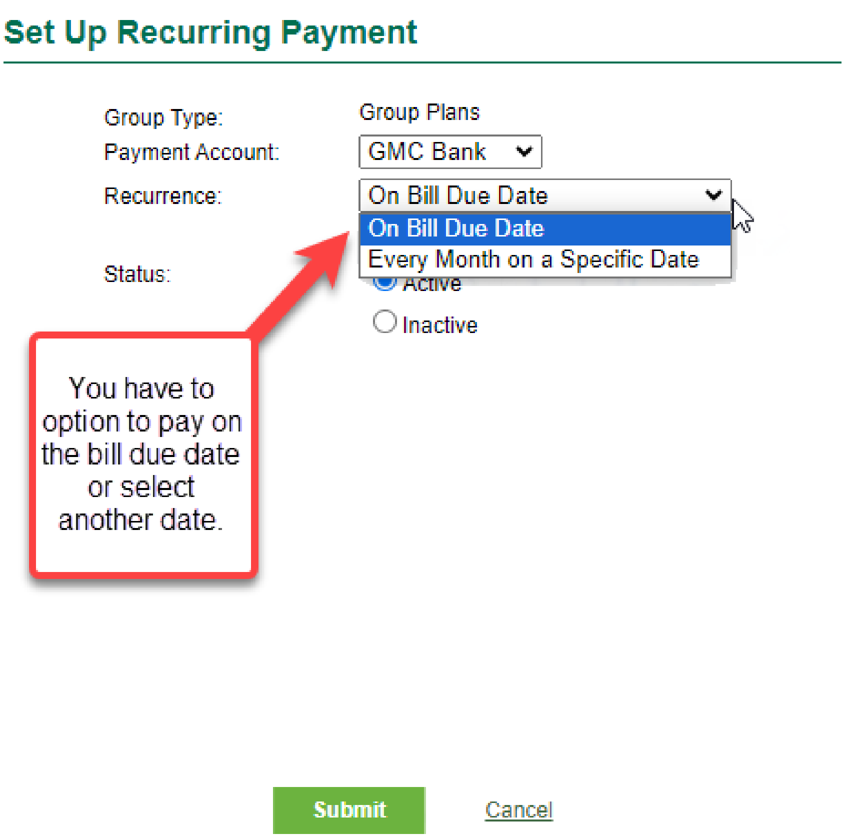

Add Bank Account
Payment Method:
Electronic Check
Account Nickname:
Account Number:
Account Type:
Checking
Routing Number:
Name(s) on Bank Account:
Add Account
Cancel

Recurring Payments

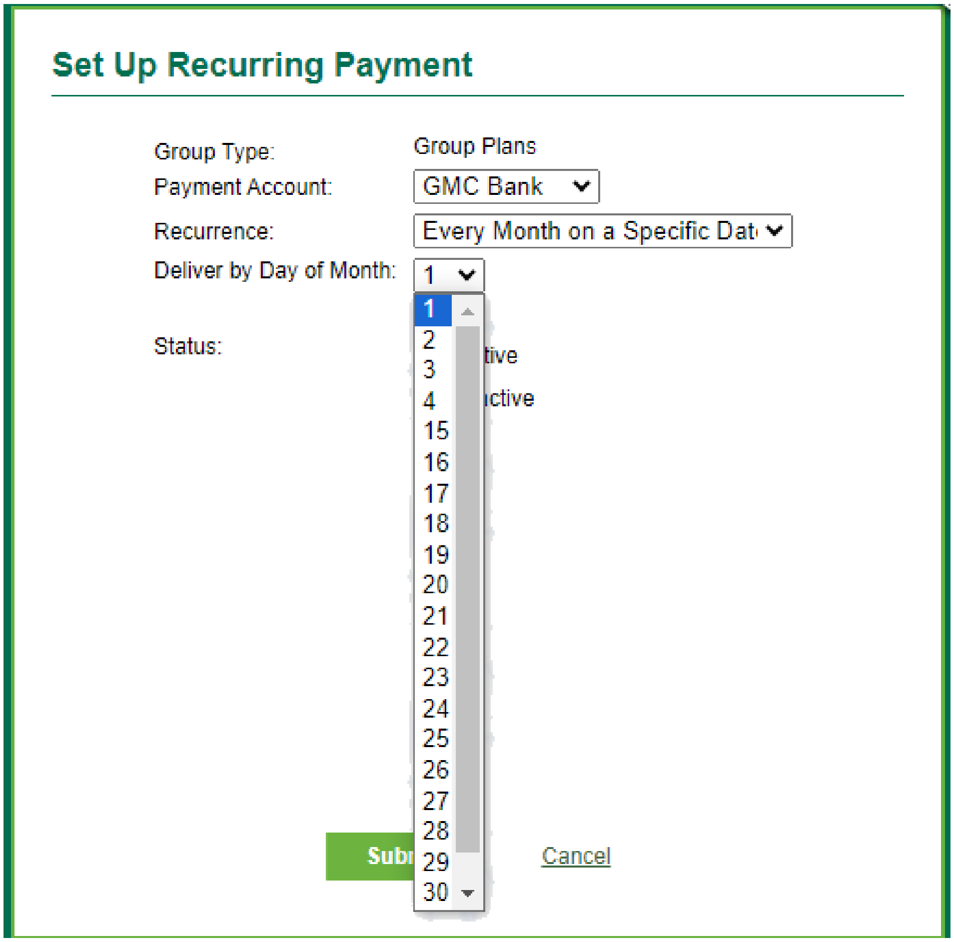
To set up a recurring payment on a specific day of the month, click on the **Recurring Payments** tab.



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



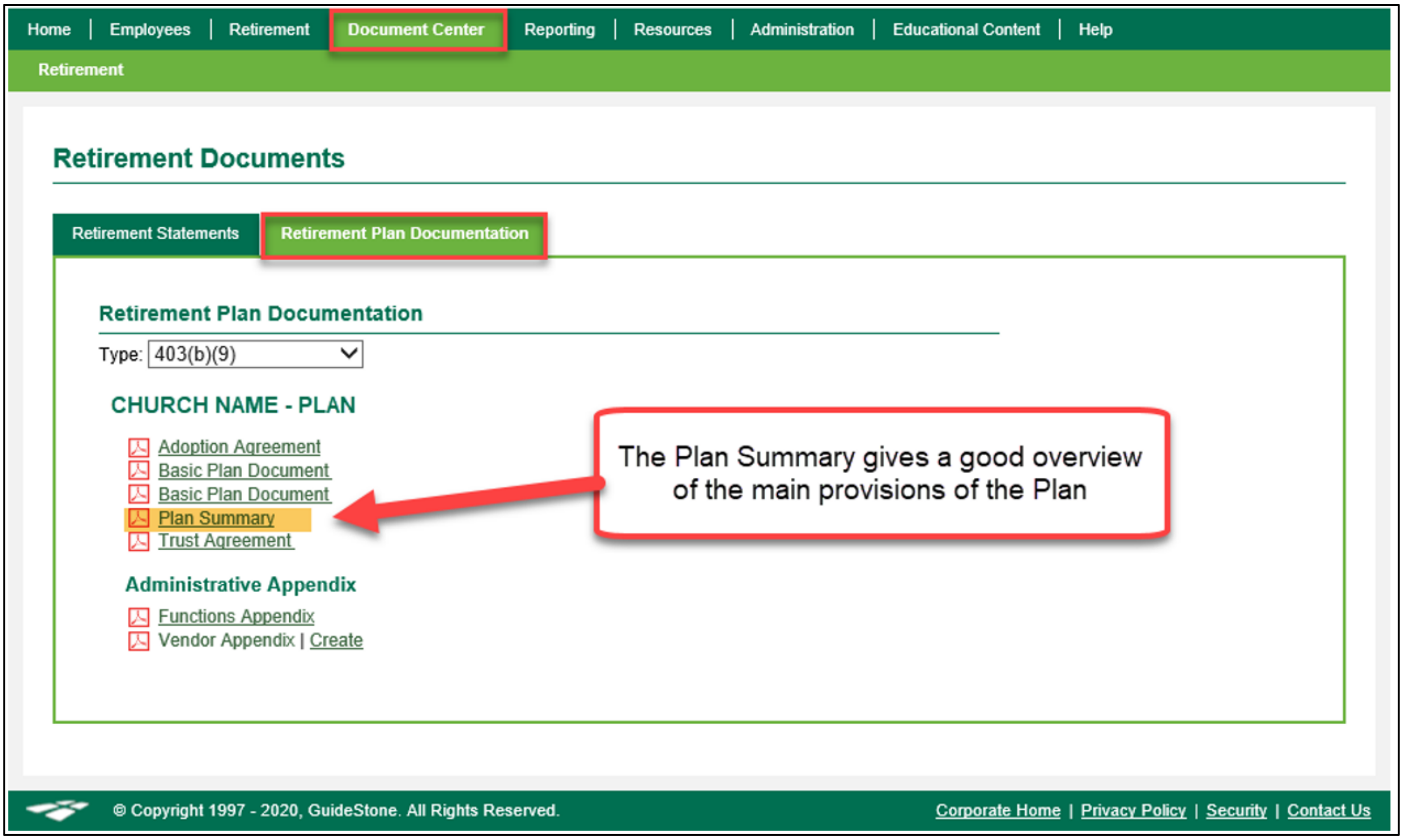
If you select a date other than the bill due date, you will notice that the 5th – 14th of the month are not available options as that is the time period when the system is looking for billing changes and creating the next month’s bill.



Click “Submit”.

Document Center Tab

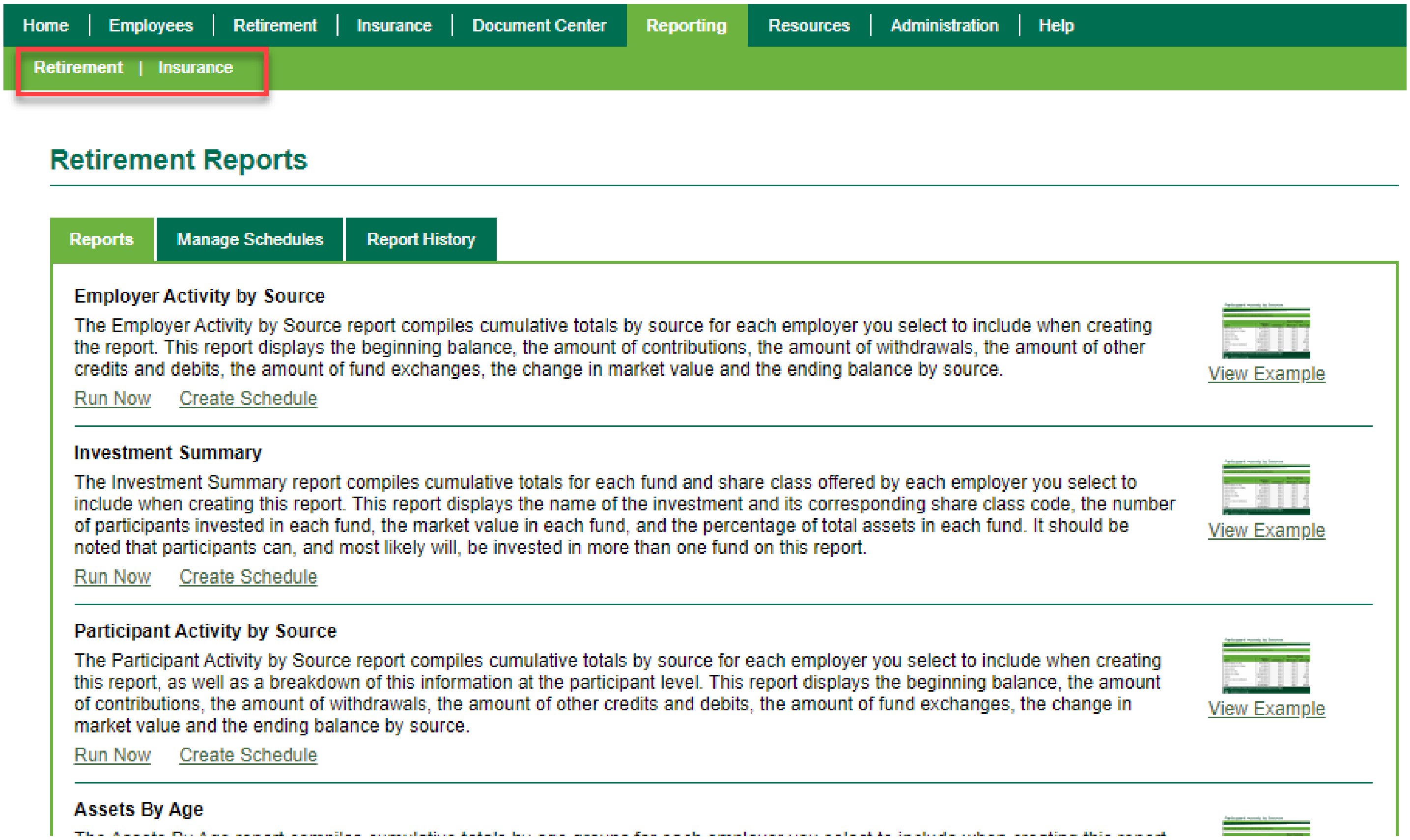
The **Document Center** tab provides access to view the defined contribution retirement plan documents such as the Adoption Agreement, Basic Plan Document, the Plan Summary.



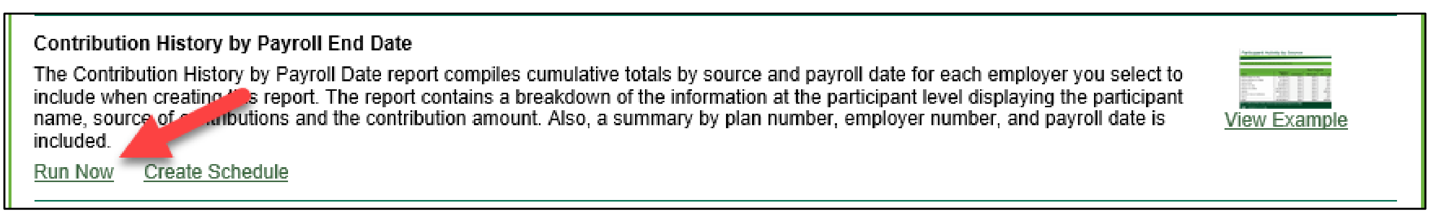
Reporting Tab

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:

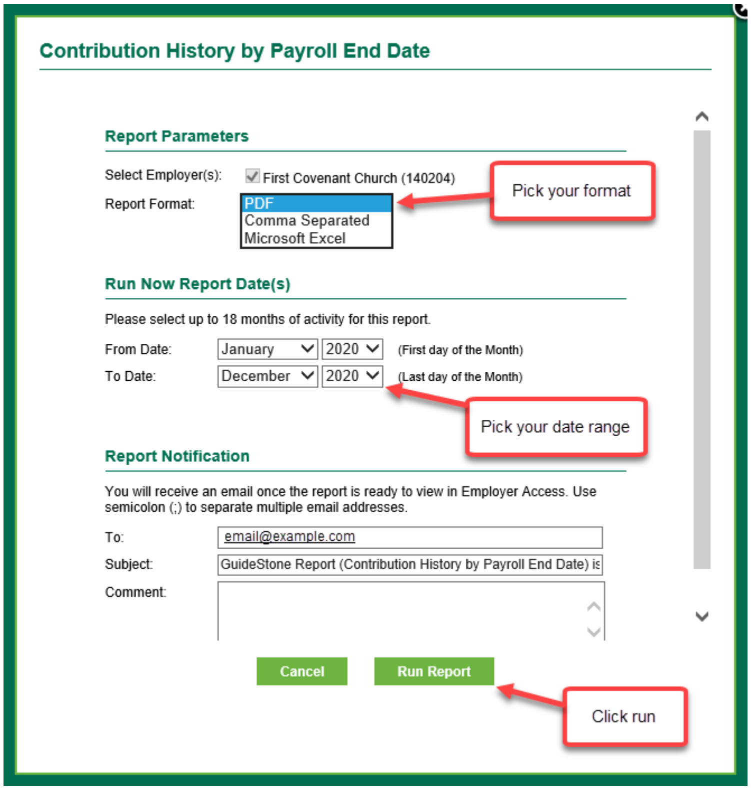
STEP 1: Click on the "Reports" subtab to see a list of reports that can be created.



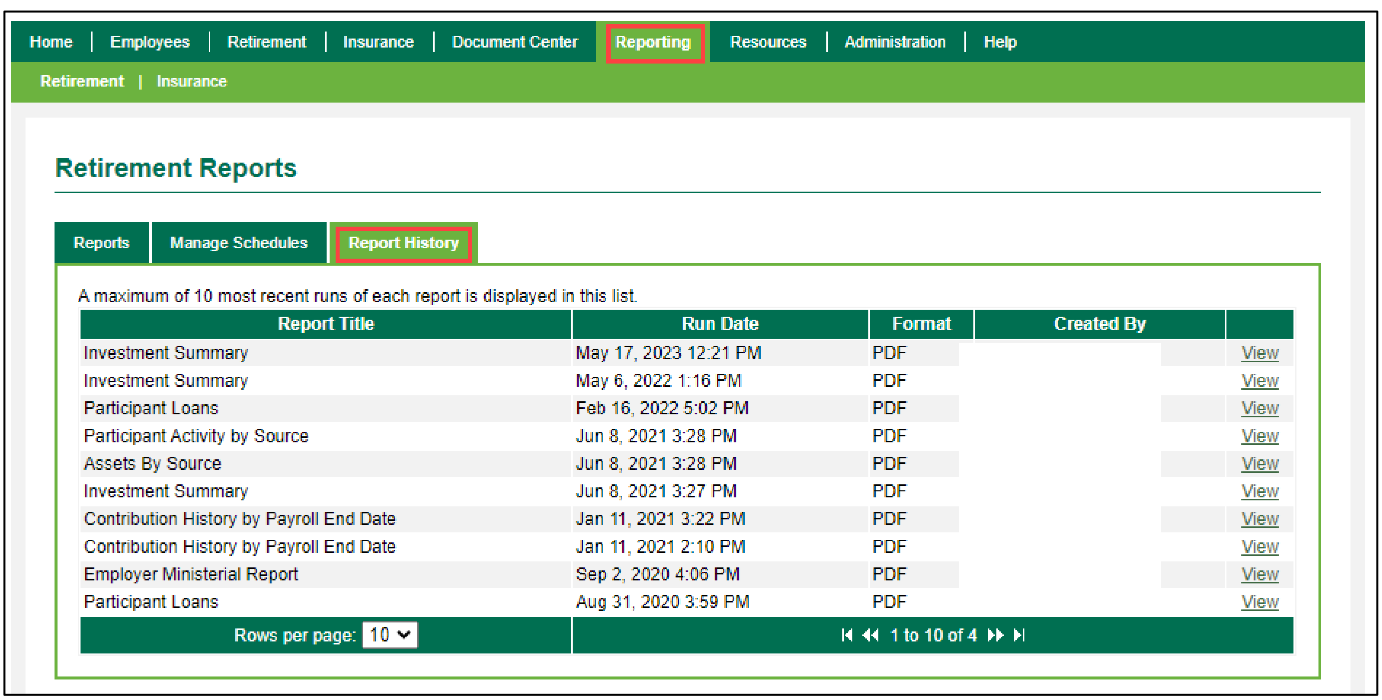
STEP 2: To run the report, click the "Run Now" link.



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



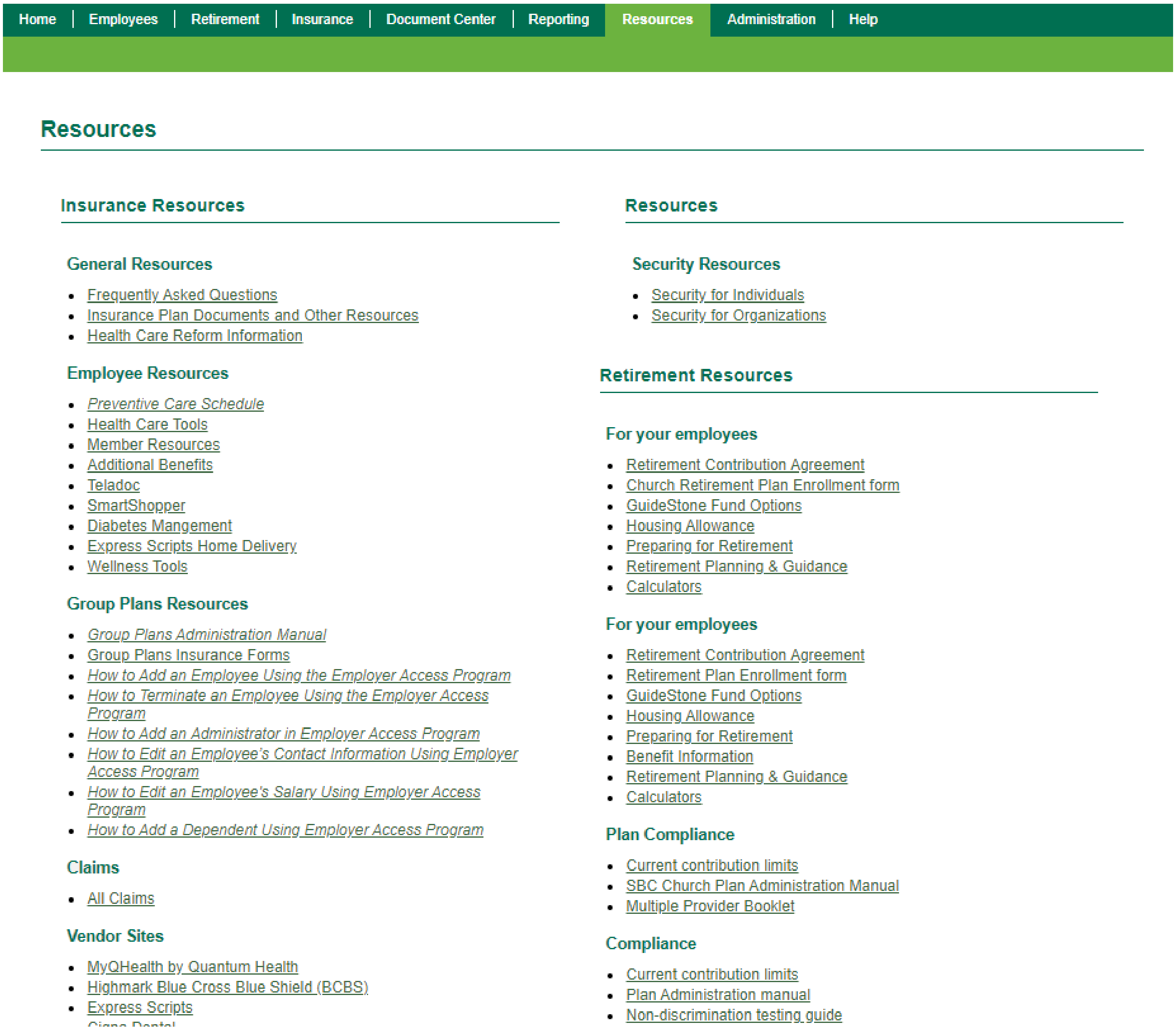
STEP 4: You will receive an email letting you know the report is ready. You can find your report on the **Home** page or on the **Report History** tab.



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.



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

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

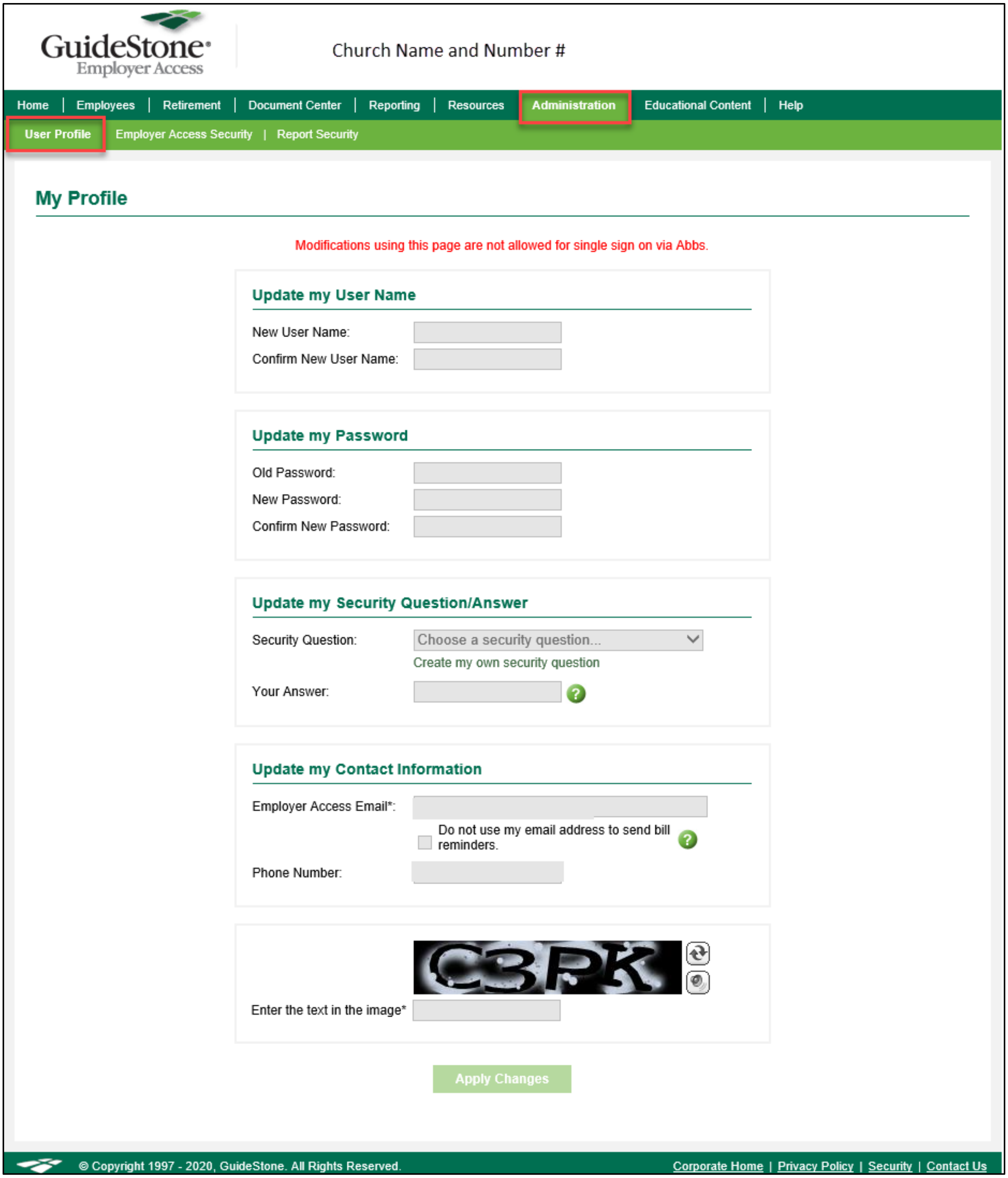
Compliance

- Current contribution limits
- Plan Administration manual
- Non-discrimination testing guide

Administration Tab

Update your User Profile

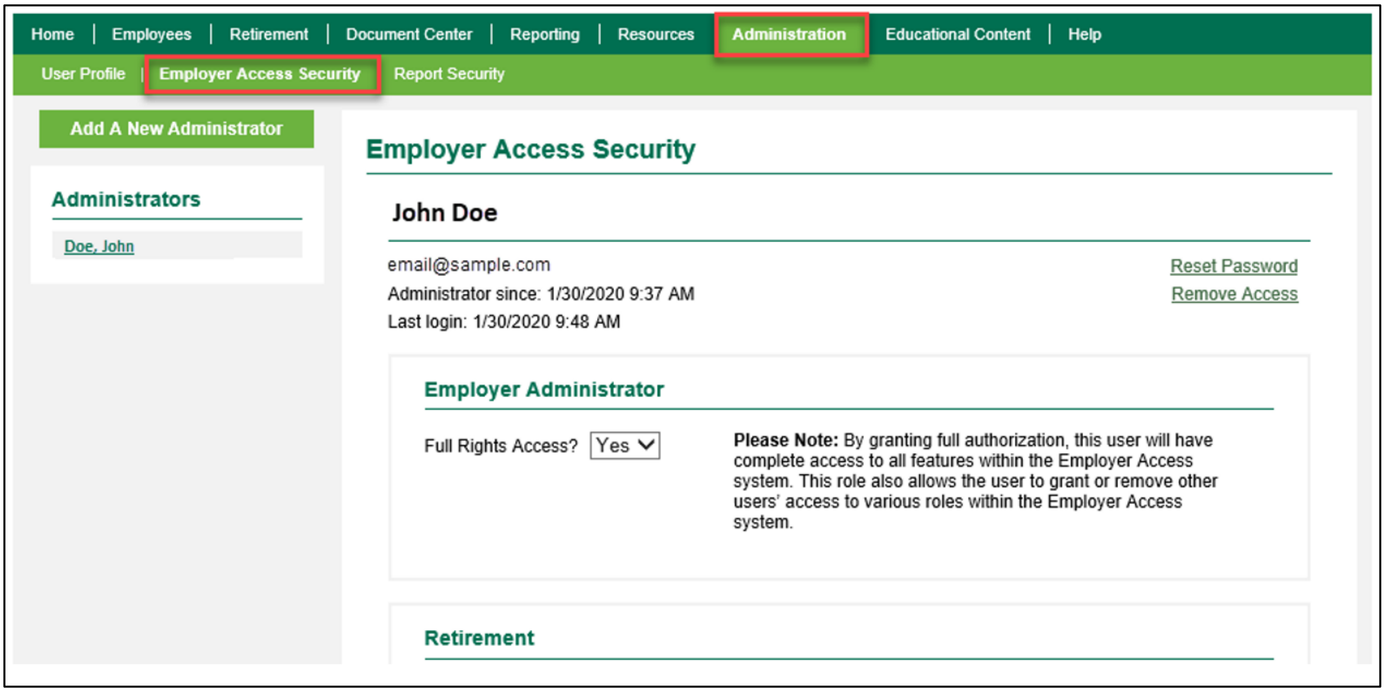
Select the **Administration** tab from the main toolbar. The screen will default to the **User Profile** subtab. You can update any item on the screen, then click the "Apply Changes" at the bottom of the screen.



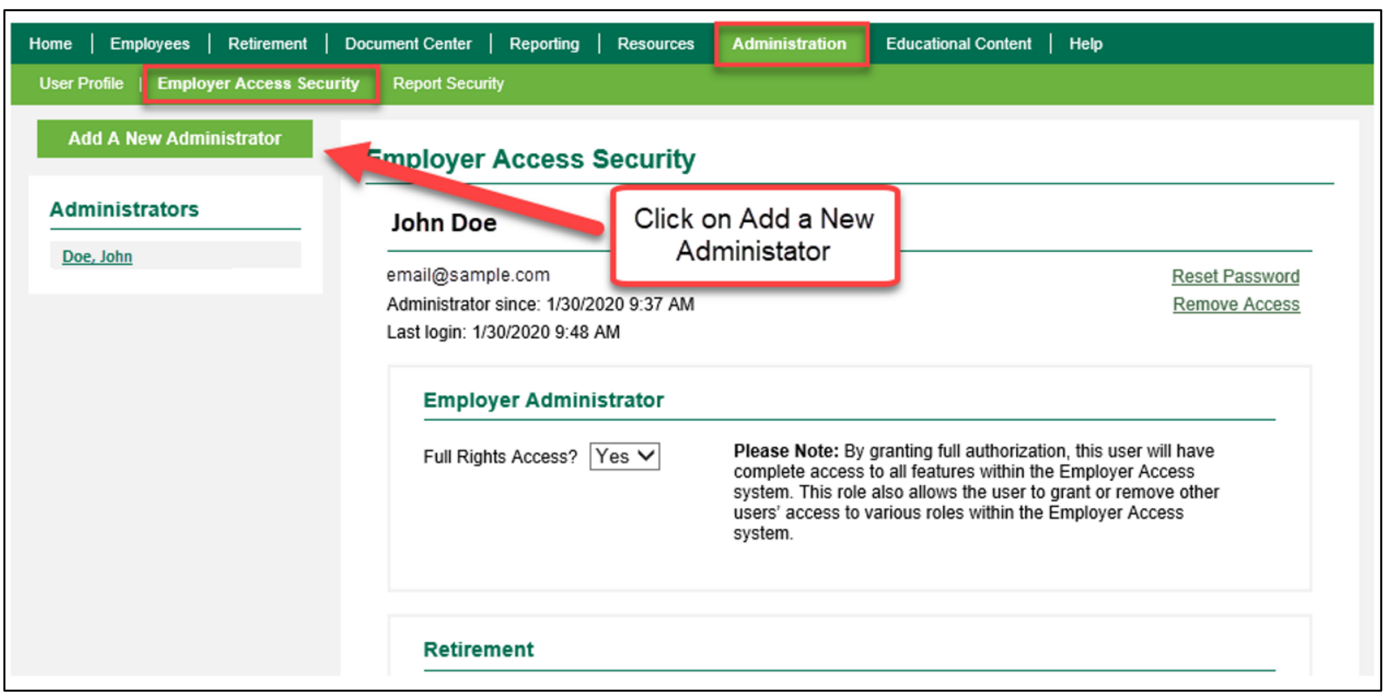
Add a new EAP Administrator

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.

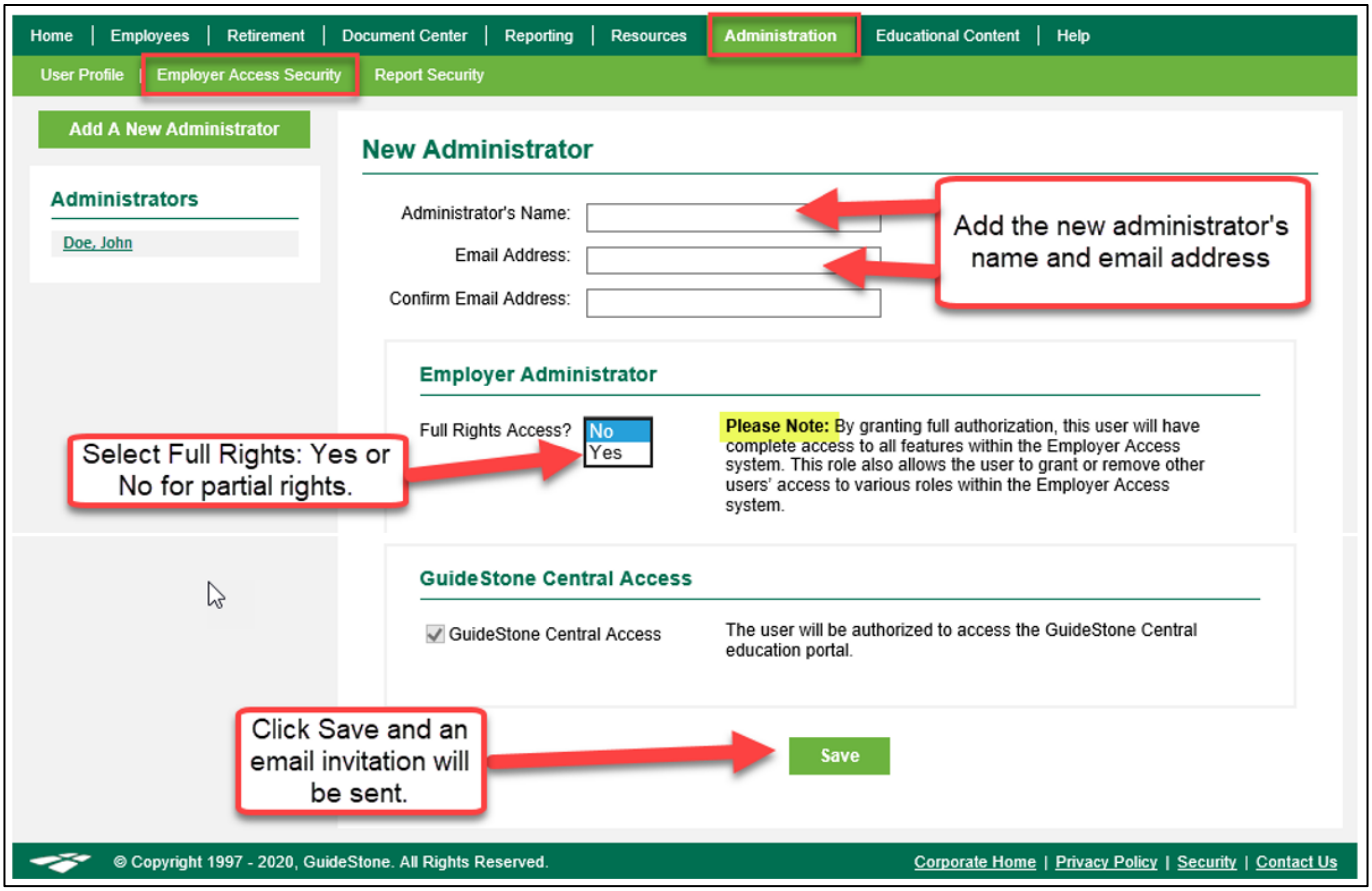
STEP 1: Select the **Administration** tab from the main toolbar, then select **Employer Access Security**. A list of current administrators will be present on the left-hand side of the screen.



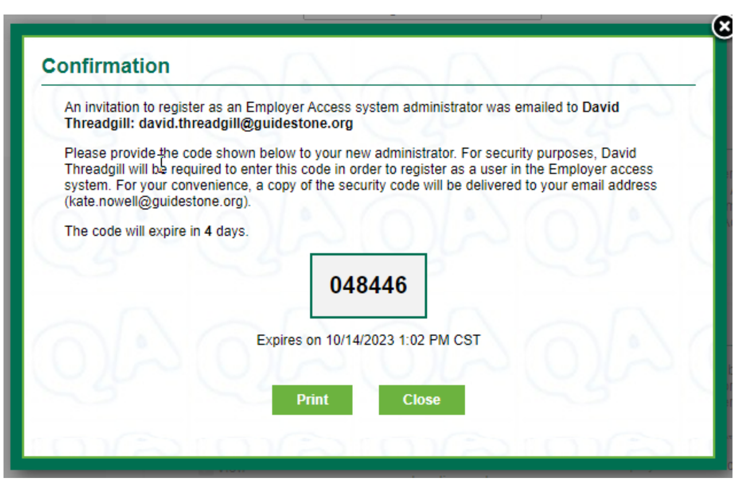
STEP 2: To add additional administrators, click on the "Add A New Administrator" button.



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:

GuideStone™
Employer Access

John Smith,

Thank you for inviting **Jane Doe** to be a GuideStone Employer Access administrator for **Converge Church**.

Please provide them with the following administrator registration code, which will be required to complete their registration:

884925

This is a single-use code that will expire in 4 days.

If you have any questions, please contact us.

Thank you,
GuideStone® Employer Access Support Team

Please do not reply to this message, as this email address is not monitored for replies. If you have an inquiry, please contact us.

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

GuideStone™
Employer Access

Jane Doe,

You have been invited to be a GuideStone Employer Access account administrator for **Converge Church**.

To register your account, you will need to obtain an administrator registration code from John Smith

After you receive your registration code, please use it to complete the registration process.

This link will expire in 4 days.

If you have any questions, please contact us.

Thank you,
GuideStone® Employer Access Support Team

Please do not reply to this message, as this email address is not monitored for replies. If you have an inquiry, please contact us.