

ADMINISTRATIVE USER GUIDE



BENEFIT CONNECTOR

Benefit Connector Administrative User Guide

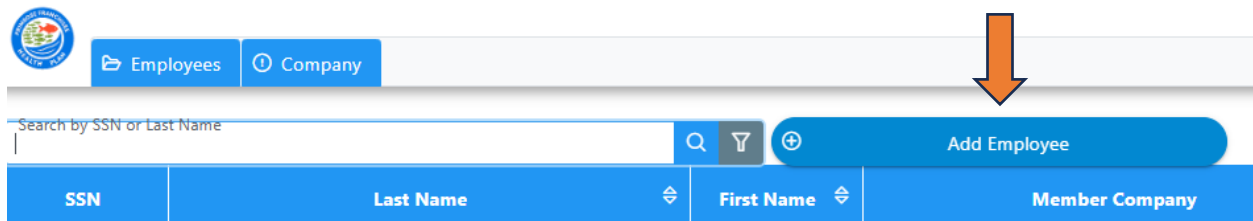
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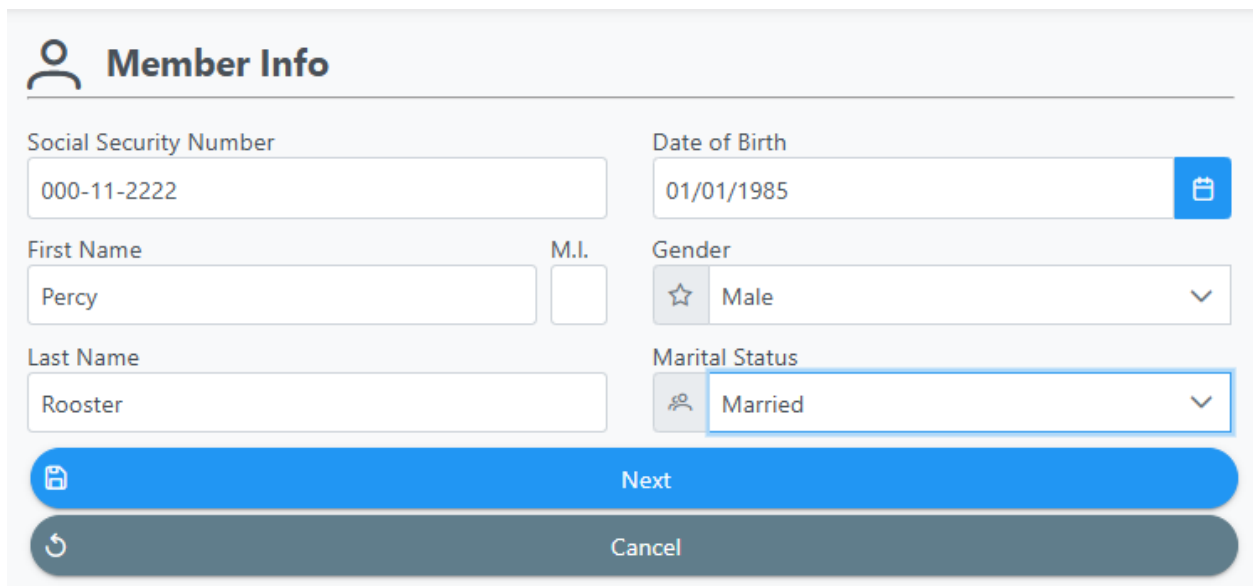
Adding A New Member

Step 1 - click Add New Member from the front screen:



The screenshot shows the top navigation bar with a logo on the left and two tabs: 'Employees' and 'Company'. Below the navigation bar is a search bar with the placeholder text 'Search by SSN or Last Name'. To the right of the search bar is a blue button labeled 'Add Employee'. An orange arrow points down to the 'Add Employee' button. Below the search bar is a table with four columns: 'SSN', 'Last Name', 'First Name', and 'Member Company'.

Step 2 - complete the initial screen required information and hit **Next**



The screenshot shows the 'Member Info' form. It has a header with a person icon and the text 'Member Info'. Below the header are several input fields: 'Social Security Number' (000-11-2222), 'Date of Birth' (01/01/1985), 'First Name' (Percy), 'M.I.' (empty), 'Gender' (Male), 'Last Name' (Rooster), and 'Marital Status' (Married). At the bottom are two buttons: 'Next' (blue) and 'Cancel' (grey).

Step 3 - complete the Employment Info. Choose the Member Company (if you own multiple schools, make sure to select the correct school name). The group should auto-default to that school's medical rate tier. If it doesn't, make sure to choose the correct medical rate tier (.8, .9, 1.0, 1.1, 1.2 or 1.5). Also ensure to enter Date of Hire, Salary Effective Date, and Salary.

 **Employment Info**

Member Company



Select Member Company



Group



Select Group



Employee Status



Active



Relationship



Employee



Date of Hire



Salary Effective Date



Salary

\$

0.00

Salary Unit



Annual



Occupation

Employer Assoc Number

Waiting Period Override



Step 5a – During Initial Open Enrollment, all employees must use the Call Center. For Initial Open Enrollment, under Enrollment section, do not select anything and leave as Closed. The system will automatically determine the Employee’s Open Enrollment window.

Enrollment

Open Enrollment

 Closed 

Employee not currently in individual enrollment.

Comments

HR Info

Organizational References

GL Code

Save, Reset & Exit

 Save

 Return

Step 5b – For New Hires and ongoing new hire enrollment, employees can enroll online or via the Call Center. In this case, you will want to select Open (Automatic) and the enrollment parameters will be automatically set based on the Date of Hire rule (60 days from the first day of employment).

 **Enrollment**

Open Enrollment

 Open (Automatic) 

Date Enrollment Begins

Enrollment Effective

Date Enrollment Ends

Available

Selected

 Medical
 Dental
 Vision
 Basic Life
 Supplemental Life

Step 6 - complete the enrollment by selecting Yes and Save.

 **Save Changes?**

You may automatically put this employee in enrollment

Automatically Enroll Employee
☒ Yes ☐ No

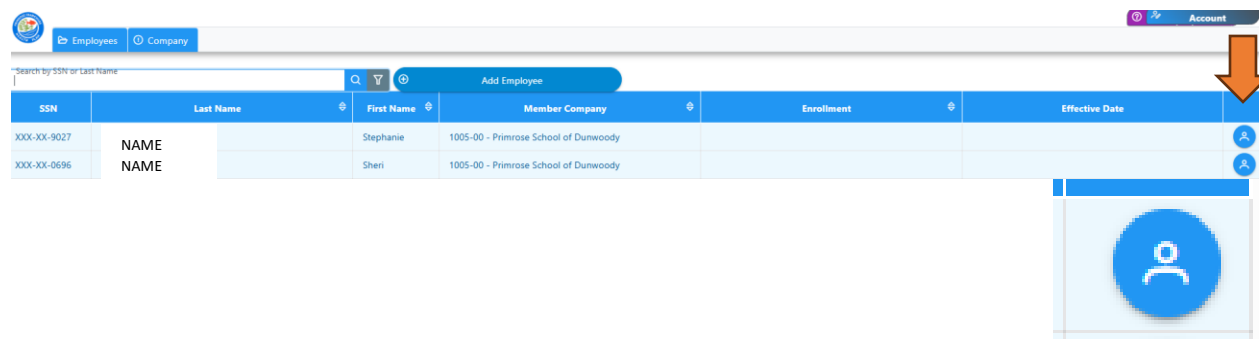
 Save

 Return

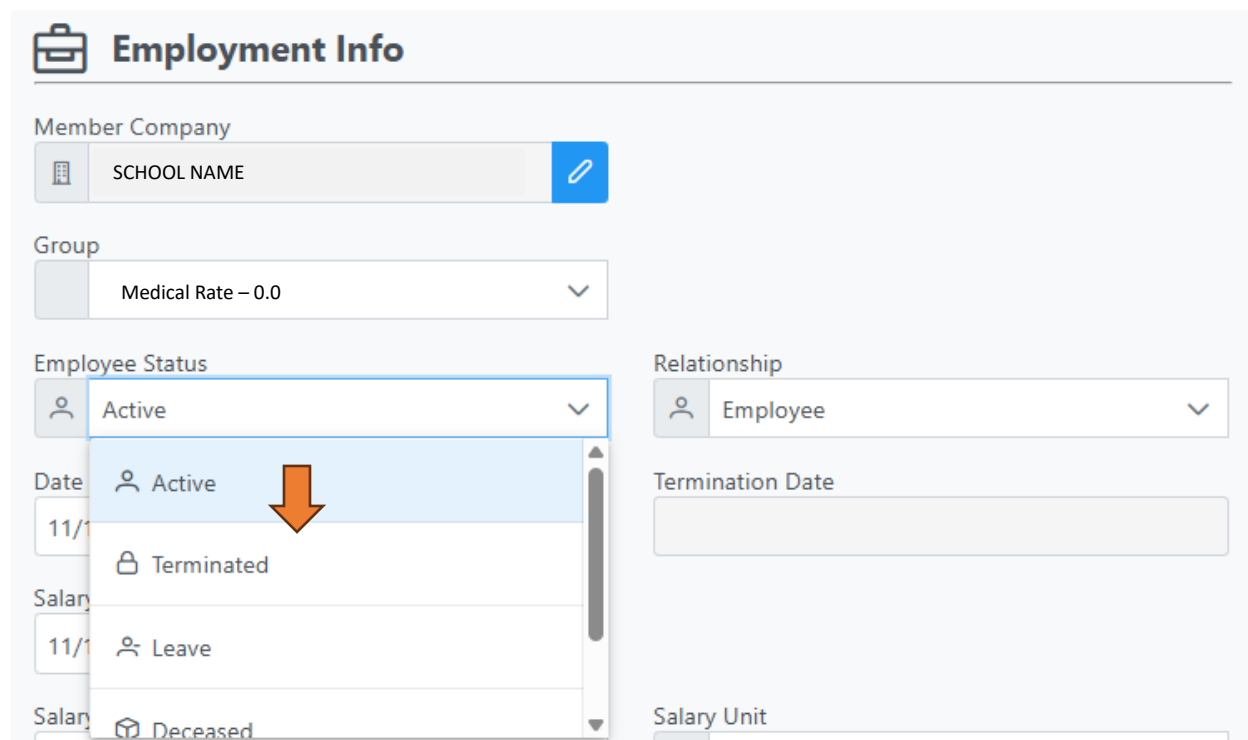
Employment Termination Process

Below are the instructions on how to terminate an existing employee

Step 1 - Select the desired employee from the list of employees on the initial home screen by clicking on the icon on the far right of the screen



Step 2 - Click on **Employee Status** located in the Employment Info section on the Info tab. Change the value to **Terminated**



Step 3 - put in the correct employment termination date in the **Termination Date** field.

 **Employment Info**

Member Company

 SCHOOL NAME 

Group

Medical Rate – 0.0 

Employee Status

 Terminated 

Relationship

 Employee 

Date of Hire

1/1/1985 

Termination Date 

01/30/2026 

Click the **Save** button at the bottom of the screen and the benefits will automatically be terminated based on the termination type on each coverage.

 **Save Area**

Added: 11/24/2025 09:55 AM By: ADMIN NAME
Updated: 12/01/2025 10:28 AM By: TERMINATED EMPLOYEE USERNAME

 Save

 Return

Re-hire Process

Step 1 - select the member that has been re-hired from the "Search Employee" area. If you don't see the member when searching by name, key in the SSN and search:

SSN	Last Name	First Name	Member Company	Enrollment	Effective Date
XXX-XX-9027	NAME	Stephanie	1005-00 - Primrose School of Dunwoody		
XXX-XX-0696	NAME	Sheri	1005-00 - Primrose School of Dunwoody		

Step 2 - on the Information tab, under the Employment Info area, change the status from Terminated to Active. This will disable the Termination Date field.

Employment Info

Member Company: SCHOOL NAME

Group: Medical Rate - 0.0

Employee Status: **Active** (selected), Terminated, Leave, Deceased

Relationship: Employee

Termination Date: 01/30/2026

Salary Unit:

Step 3 - you will be prompted to confirm this is to be treated as a re-hire. If so, click the Employee Rehire check box and then enter the new Date of Hire, new Salary Effective Date, New Salary, and Salary Unit. Click the Save button at the bottom to save the entries.

 **Employment Info**

Member Company

 SCHOOL NAME 

Group

Medical Rate – 0.0 

Employee Status

 Active 

Relationship

 Employee 

Employee Rehire 

☒ Yes ☐ No

Termination Date

01/30/2026

Date of Hire 

02/23/2026

Previous Date of Hire

11/10/2025

Salary Effective Date 

02/23/2026

Previous Salary Effective Date

11/10/2025

Salary

\$ 18.00

Salary Unit 

Hourly 

Step 4 – Click the Save button at the bottom to save the entries.

 **Save Area**

Added: 11/24/2025 09:55 AM **By:** ADMIN NAME

Updated: 02/13/2026 08:46 AM **By:** TERMINATED EMPLOYEE USERNAME

 Save

 Return

Step 5a – Select No to allow employee to follow the New Hire enrollment rules. Save

The screenshot shows a 'Save Changes?' dialog box with a back arrow in the top left. A yellow banner at the top states 'Salary Effective Date changed without other changes.' Below this, a warning message asks: 'You have changed this employee's employment dates, do you wish to treat this employee as a rehire?'. Two radio buttons are provided: 'Employee Rehire' (selected) and 'Correction'. Another yellow banner explains: 'Processing this change as a rehire will clear coverage information from the prior employment period so the employee can be treated as a new hire for benefits purposes.' A blue information box states: 'You may automatically put this employee in enrollment'. Below this, the 'Automatically Enroll Employee' section has two checkboxes: 'Yes' (unchecked) and 'No' (checked). At the bottom are two large buttons: 'Save' (blue) and 'Return' (grey).

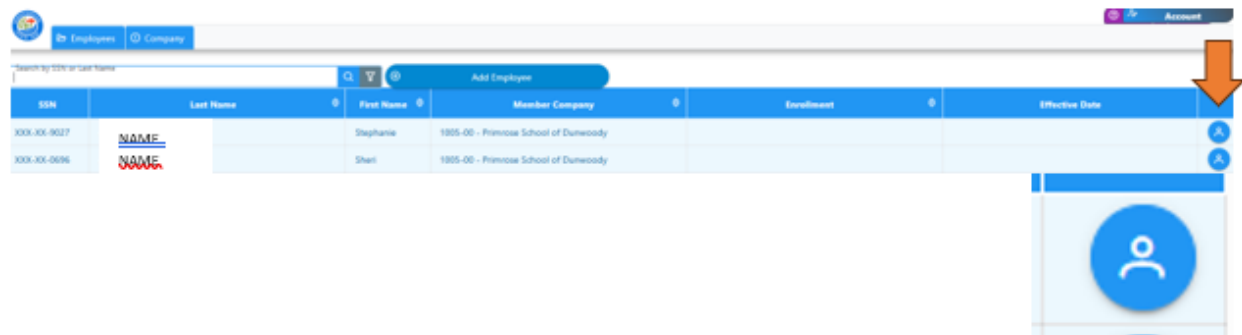
Step 5b – To set the employee up to join an Open Enrollment period, select Yes. Once checked, you will prompted regarding setting the member up in an enrollment period. If you want the system to automatically set the member up in a new hire enrollment period, check the appropriate box and click Save.

The screenshot shows the 'Enrollment' page in the HR system. The top navigation bar includes 'Employees' and 'Company' tabs. The main heading is '★ Enrollment'. Below this, a note states: 'This employee is included in the Annual Enrollment Period starting on Oct 01, 2024, ending on Dec 31, 2024 and effective on Jan 01, 2025.' A green bar indicates 'Individual Enrollment'. The page is divided into two columns: 'Available' and 'Selected'. The 'Available' column lists 'Date Enrollment Begins' (10/03/2024) and 'Date Enrollment Ends' (11/14/2024). The 'Selected' column lists 'Enrollment Effective' (12/01/2024) and 'Remaining Pay Periods for HSA/FSA Enrollments' (26). Below these, there are icons for 'Medical', 'Dental', 'Vision', 'Basic Life', and 'Supplemental Life'.

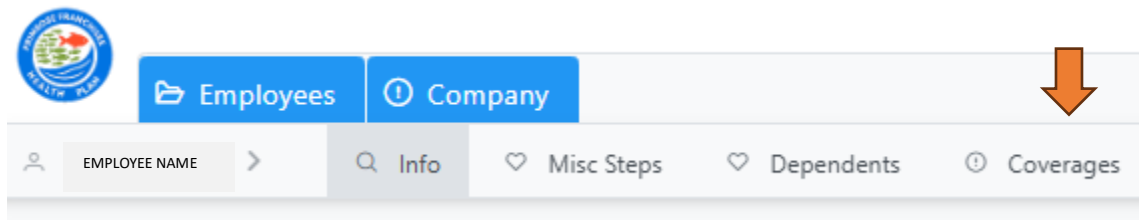
Current Benefit Change Process

If you need to make a change to a current benefit, you have the ability to make this change at any time in the current coverage area.

Step 1 - select the desired employee from the list of employees on the initial screen:



Step 2 - click the Coverage tab in the top menu on the employee's screen:



Step 3 - select the desired coverage that you need to make the change on:

The screenshot shows the 'Current Benefits as of Apr 01, 2026' screen. It features a table with columns: Plan, Tier, and an 'Edit' button. The table lists various coverages and their tiers.

Plan	Tier	
Medical - HDHP \$4000 - 0.9	Full Family	Edit
Health Savings Account	Full Family	Edit
Dental - High Option	Full Family	Edit
Vision	Full Family	Edit
Basic Life	Employee Only	Edit
Basic AD&D	Employee Only	Edit
Waived Voluntary Life	Unelected	Add
Waived Voluntary STD	Unelected	Add
Waived Voluntary LTD	Unelected	Add
Waived Hospital Indemnity	Unelected	Add
Group Accident	Full Family	Edit
Terminated: Dec 31, 2025 (Critical Illness - \$20,000)	Employee & Spouse	Reactivate
Admin Fee	Employee Only	Edit

Step 4 - make the desired change on the benefit screen. If you change the class or the tier and have not changed the Effective Date, the date will be highlighted in yellow and a warning dialogue will be displayed notifying you that the effective date may need to be changed.

Select Plan

☐	MB01 - Medical - PPO \$1500	
☒	MB02 - Medical - PPO \$3000	
☐	MB03 - Medical - PPO \$7000	
☐	MB04 - Medical - HDHP \$4000	

Effective Dates & Termination Dates

Original Begin Date

01/01/2026



Effective Date

01/01/2026



Coverage Term



 You have not changed the effective date, it is recommend that you review this.

Select Tier

	Full Family	
---	-------------	---

Select Dependents

☐ Manually Adjust Dependent Effective/Term Dates

Begin Date

Term Date

Dependent

Relationship

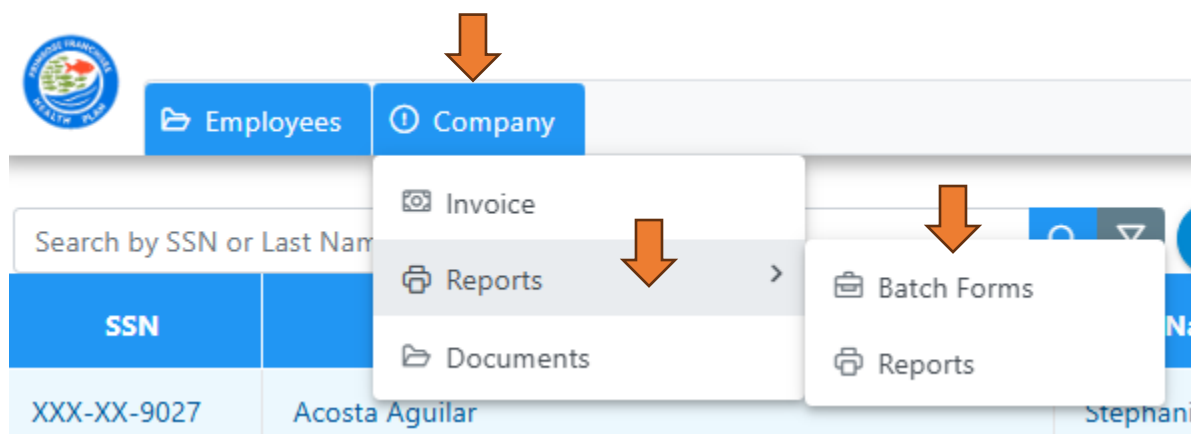
Once the coverage change has been saved, the new election will be considered the current benefit and will be reported on the next weekly EDI file to the carrier.

Reporting

The Reporting Tool provides access to a wide range of **standard (“canned”) reports**, as well as **Batch Forms** that can be used to distribute information for multiple employees at once.

If additional reporting needs arise, **custom reports can also be requested through customer service**, allowing organizations to obtain specialized data extracts or analyses that may not be available within the standard report library.

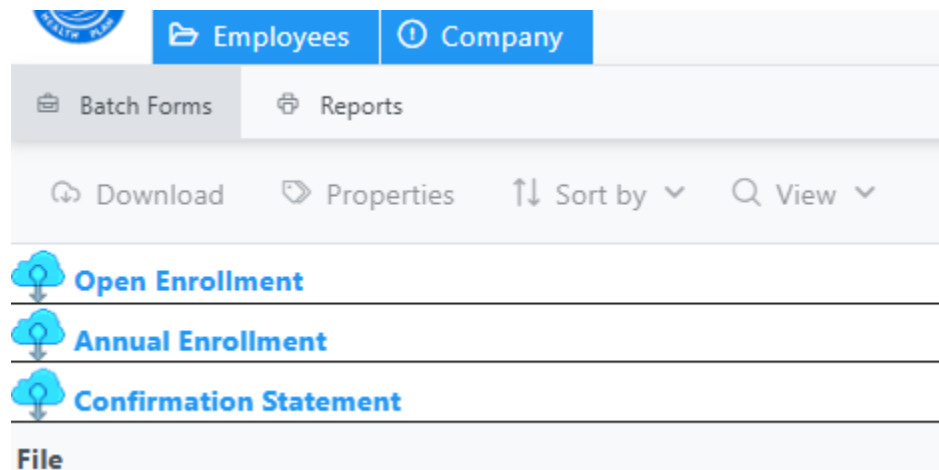
Step 1 – Navigate to Reports by selecting Company => Reports. You can then select Batch Forms (e.g., Confirmation Statements) or Reports (e.g. Extended Census Report).



Batch Forms

You can generate **Batch Forms** for the following:

- Open Enrollment: This would generate batch enrollment forms for employees going through individual new hire enrollment windows (e.g., new hires during the month of May)
- Annual Enrollment: This would generate batch enrollment forms for employees during the Annual Open Enrollment window (e.g., effective date of January 1st, annually)
- Confirmation Statements: Can run anytime during the year that shows each employee and their election – you can add a signature line (select Show Signature)



The screenshot shows the 'Create Batch Annual Enrollment Statement' form. On the left, there are several sections with checkboxes and radio buttons for configuring the batch form. A large orange arrow points to the 'Show Signature' checkbox, which is checked. To the right of the form, there is a text box that reads: 'Select Show Signature to add a signature line; great feature to have employees "sign-off" and return to you confirming their election/waived'. On the far right, there is a 'Member Companies' section with a list of companies, including 'Primrose School of Dunwoody' and 'COBRA Participants'.

Create Batch Annual Enrollment Statement

☒ Sort By Name
☐ Sort By SSN
☐ Sort By Department, Name

Display SSN
☒ Show SSN

Show Salary
☐ Yes ☒ No

Show Assoc Num
☐ Yes ☒ No

Show Premium
☐ Yes ☒ No

Show Signature
☐ Yes ☒ No

Auto Signature
☐ Yes ☒ No

Add Address Box
☐ Yes ☒ No

Select Show Signature to add a signature line; great feature to have employees "sign-off" and return to you confirming their election/waived

Member Companies

Association
☒ Primrose School of Dunwoody
☐ COBRA Participants

Download

Reports

Below are the most commonly used reports.

- **Extended Census Report** – contains ALL employee information to include name, DOH, salary, employment status, current benefit elections and premiums
 - **Pro Tip: The ONLY report you really need!**
- **Custom Extended Census Report** – the Extended Census Report that allows you to choose columns (data) you want to exclude
- **Age Out Report** – shows any dependents turning 26 – allows you the ability to remind participating employees that their dependents will be losing coverage effective xx/xx/xx
- **Age 65 Report** - shows any participant or dependents turning 65 that are becoming age-eligible for Medicare.

Sample Report Screenshots

Extended Census Report

Step 1: Select File Type (typically Excel)

Step 2: On far right, select which Association (School) you want included on the report

Step 3: Select Generate Report

Step 4: Select the green download button on far bottom once the process has reached 100%

The screenshot shows a web application interface for generating an Extended Census Report. The interface includes a header with a 'Company' tab and a 'Reports' dropdown. The main content area is titled 'Extended Census Report' with a subtitle 'A dump of employee level information with one employee per line.' Below this is a 'Create Report' section with a 'Select File Type' dropdown menu set to 'Microsoft Excel Spreadsheet (xlsx)'. A blue 'Generate Report' button and a grey 'Return' button are visible. On the right side, there is a 'Member Company' section with a table showing 'Association' and 'Primrose School of'. A green progress bar at the bottom indicates the report is at 100% completion. Annotations with arrows point to specific elements: Step 1 points to the 'Select File Type' dropdown, Step 2 points to the 'Association' dropdown, Step 3 points to the 'Generate Report' button, and Step 4 points to the green download button at the bottom right of the progress bar.

Company

Reports

Extended Census Report
A dump of employee level information with one employee per line.

Create Report

Select File Type
Microsoft Excel Spreadsheet (xlsx)

Step 1 →

Step 3 →

Generate Report

Return

Member Company

Association
Primrose School of

Step 2 →

Step 4 ↓

ExtendedCensus

100%

Custom Extended Census Report

Step 1: Under Custom Columns, check the YES box under Use Custom Columns.

Step 2: On far right, select which Association (School) you want included on the report

Step 3: Move all fields from Hidden Columns to Report Columns that you want to include on your report

Step 4: Select file type (typically Excel)

Step 5: Select Generate Report

Step 6: Select the green download button on far bottom once the process has reached 100%

The screenshot displays the 'Custom Extended Census' report generation interface. The interface is divided into several sections: 'Custom Columns', 'Sort Rows', 'Create Report', and a progress bar at the bottom.

- Custom Columns:** This section includes a 'Use Custom Columns' checkbox set to 'Yes' (Step 1). Below this are two columns: 'Hidden Columns' and 'Report Columns'. Fields are moved between these columns using arrow buttons. In the 'Hidden Columns' list, 'Medical Signature Data' is highlighted with an arrow pointing to the 'Report Columns' list (Step 3). The 'Report Columns' list currently contains 'SSN', 'Generated Id', 'System/Alt ID', 'Employee ID', and 'Status ID'.
- Sort Rows:** This section includes a 'Use Custom Sort' checkbox set to 'No'.
- Create Report:** This section includes a 'Select File Type' dropdown menu set to 'Microsoft Excel Spreadsheet (xlsx)' (Step 4). Below this are two buttons: 'Generate Report' (Step 5) and 'Return'.
- Member Company:** On the far right, there is a section for selecting an association. 'Primrose School' is selected with a checkmark (Step 2).
- Progress Bar:** At the bottom, a green progress bar shows the report generation status. The label 'ExtendedCensus' is visible, and a green download button is present at the end of the bar (Step 6).