Getting Started

New Client/Admin. Welcome Guide

PPI Connect brings all your essential resources and tools together in one secure, convenient place. From managing documents to accessing billing and policy details, this portal is designed to make your experience seamless and efficient.

Let's get you set up so you can start taking full advantage of everything PPI Connect has to offer. To access the site, you will need to create a login and set up two-factor authentication (2FA)

Client Registration and Login Steps Summary

Step-by-step instructions on the next few pages will walk you through the following:

1. Create your PPI Connect login credentials.
2. If you don't already have a 2-Factor Authentication (2FA) app on your smartphone, download the free Microsoft Authenticator, secure login software, from either **Google Play** or the **Apple App Store**.
3. Create a new Microsoft Authenticator account and scan the QR code in your PPI Connect registration browser window.
4. Enter the Microsoft Authenticator 6-digit verification code into the space provided under the QR code in your PPI Connect registration browser window.

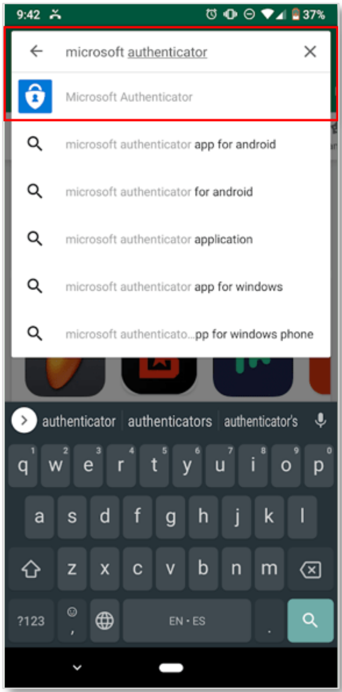
Once you've gone through this process, you're all set for PPI Connect. Just log in with your email and password at **https://portal.ppibenefits.com.** You can also access the Connect login page from our website at ppibenefits.com.

Please Note: PPI Connect will ask for a 6-digit verification number through Microsoft Authenticator each time you log into the PPI Connect portal.

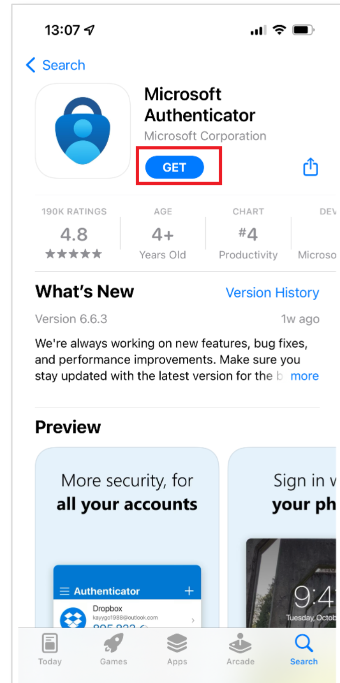
Client Registration Step 1 – Get the App

If you don't already have a 2-Factor Authentication (2FA) app on your smartphone, search for "Microsoft Authenticator" in your phone's app store: **Google Play** for android phones or the **Apple App Store** and install the **free** Microsoft Authenticator, secure login software:

From the Google Play Store:



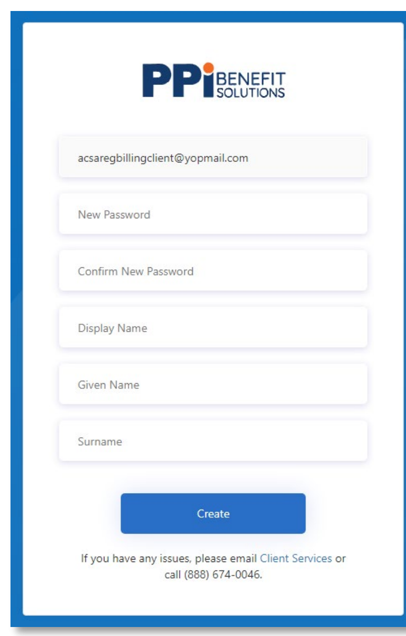
From the Apple App Store:



Client Registration Step 2 – Create Your Password

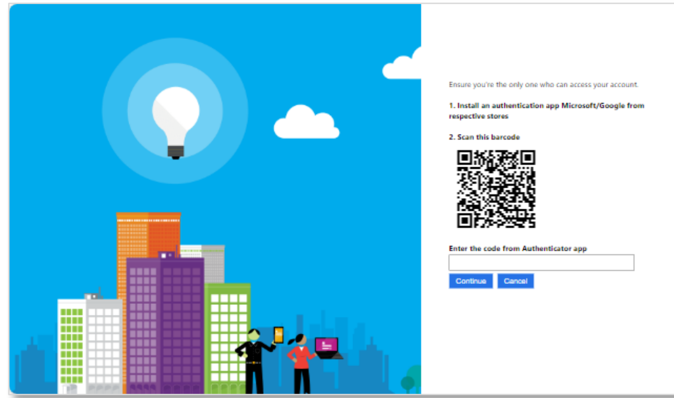
Once you have the app on your phone, you'll need to click the link in the email we send you, complete the basic info form and create your password, then click the "Create" button.

Didn't receive the email? Contact us at clientservices@ppibenefits.com and request that we send it again.



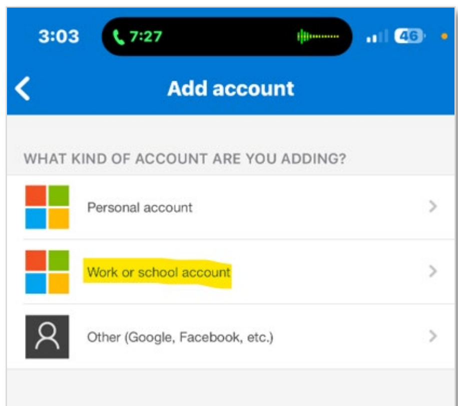
Please note: Due to differences in user permissions and ongoing system enhancements, the directions and images in this guide may not exactly match what you see on your screen.

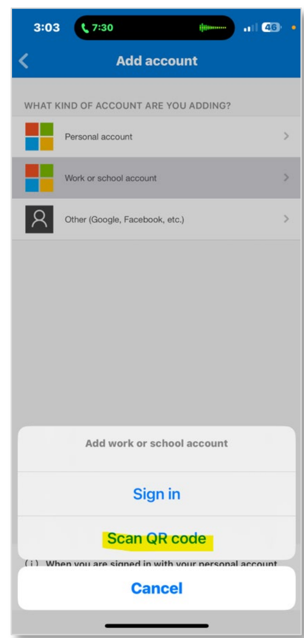
Leave the next screen open in your browser and go back to the Authenticator app on your phone:



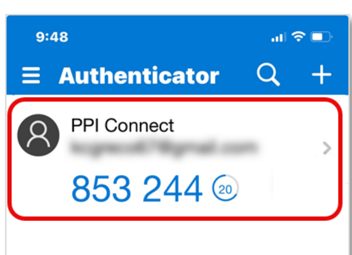
Client Registration Step 3 – Create an Account on Your 2FA App for PPI Connect

- Create a new Microsoft Authenticator account using the "+" button in the app, select "Work or school account" then "Scan QR code."





- Scan the QR code on your desktop, **from the Authenticator app on your phone – NOT** your phone's camera app.
- You should now see an account named "PPI Connect" with a 6-digit verification number underneath your email address. The code regenerates every 30 seconds.



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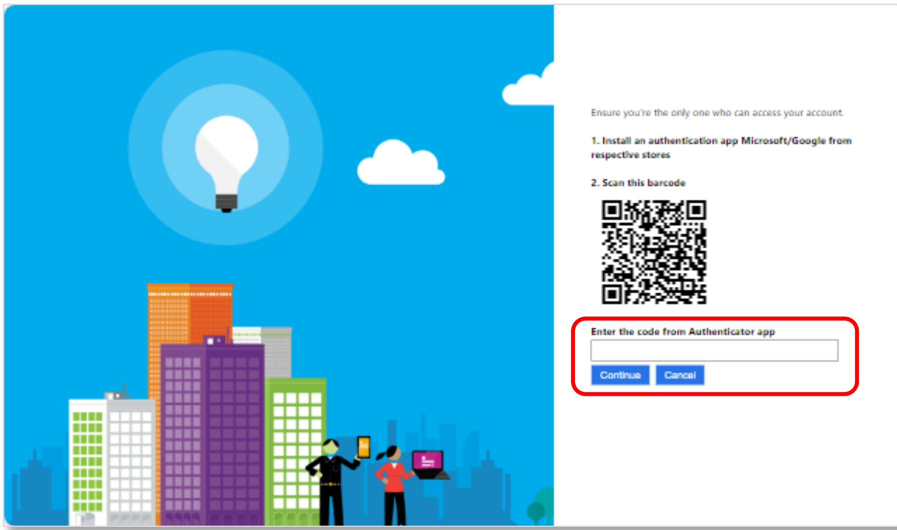
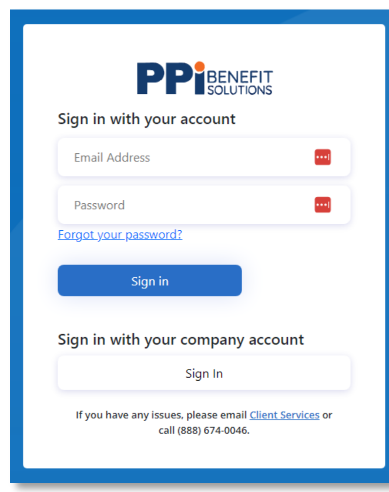
- Enter the code from the Authenticator PPI Connect Account on your phone into the space provided under the QR code in your PPI Connect registration browser window and click "Continue."

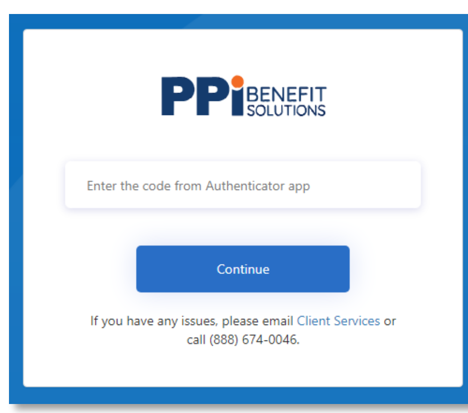


Client Registration Step 4 – Log In With Your New Account

- Under "Sign in with your account," enter your work email and the password you just created then click "Sign in." The next screen will prompt you to enter an 2FA #.



- Enter the number generated by the 2FA app to continue. You will be asked to enter a number from the app each time you log in.



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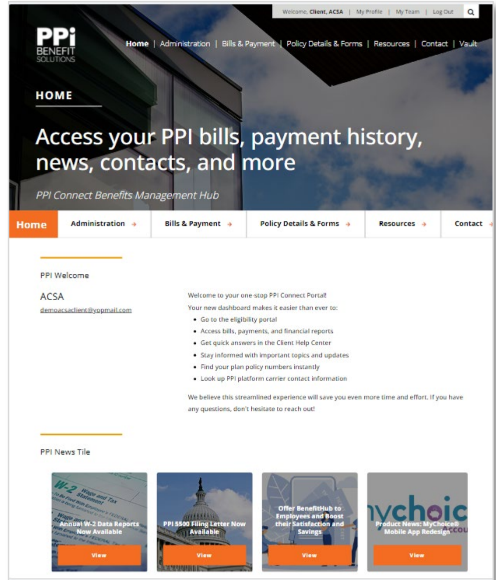
The PPI Connect Employer Portal

Welcome to your PPI Connect homepage! Here, you'll find easy access to all the tools and resources available to you, organized for quick navigation and a streamlined experience. From this central hub, you can access documents, view billing information, access reports, get help, and explore all the great resources PPI provides.



Features at a Glance

- The login process includes 2-factor authentication for a more secure website.
- Payment summaries, the annual 5500 Letter and Cost of Coverage reports, and access to online bill pay is now available to all clients, not only online billing client.
- Online billing clients can search, sort, and filter their invoice, right from the website.
- Billing history will continue to be available on a rolling 12-month schedule.
- The "Vault" stores important, client-specific documents that members of your PPI team wish to share with you.
- The Connect portal provides a better infrastructure on which to implement many future enhancements, such as single sign on with other applications (e.g., AutoEnroll) and some exciting new upgrades to our billing system.

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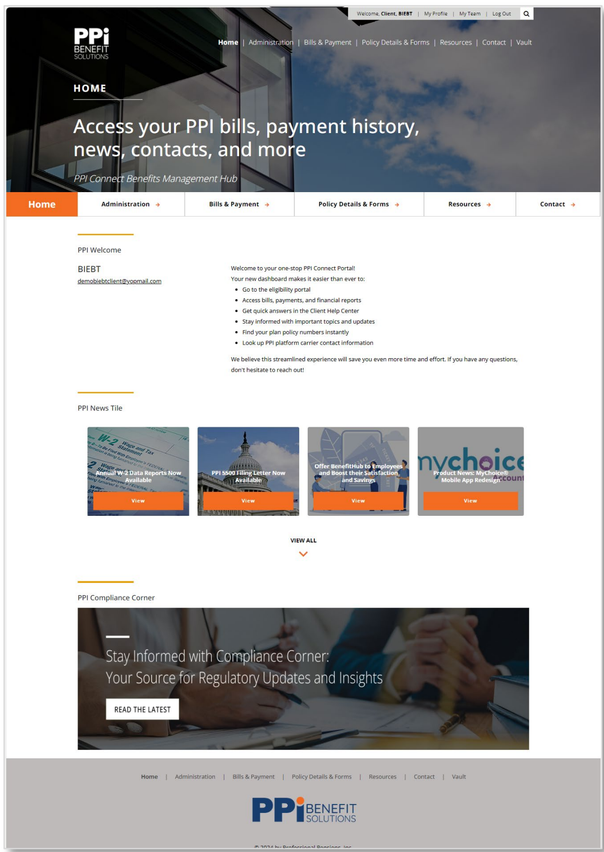
New Features in Detail

Home Page

The PPI Connect portal is a complete redesign in layout and navigation, with some enhancements around viewing and downloading your bill, obtaining financial reports, storing documents, and accessing resources.

Navigate the site using the top menu or the tabs under the header

Get to the bi-weekly *Compliance Corner* newsletter from the Compliance Corner banner.



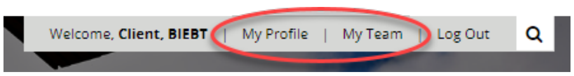
Use the top welcome tabs to set notification preferences or view your PPI Team contacts.

Go to the Vault to view and download documents, reports, and bills.

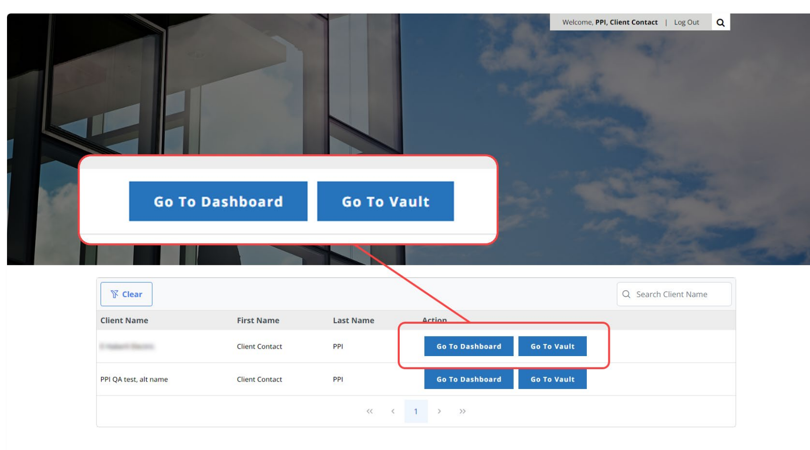
The News section includes links to client notifications and announcements

Users with Multiple Accounts

If you have access to multiple accounts, upon logging in you will see a searchable table of accounts with links to their Dashbards (Home) and Vaults (Reports and Documents).



To get back to this screen from an account, select My Clients from the top tab menu.



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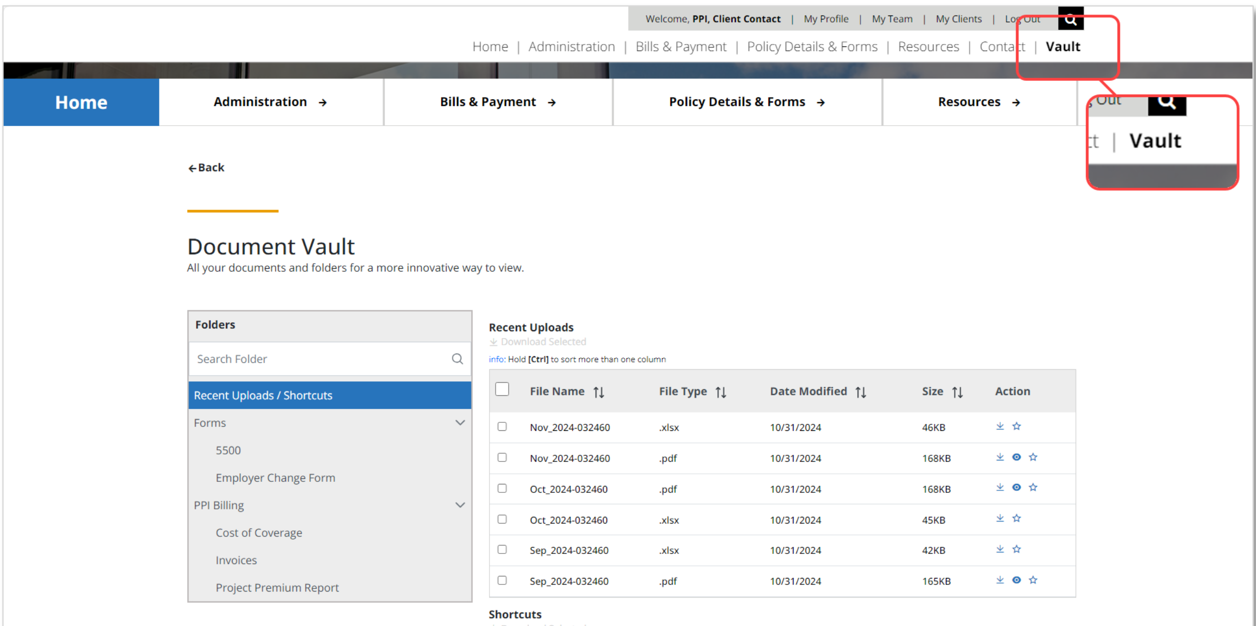
The Vault

The Vault allows PPI to securely share information and documents with you online. All materials are neatly organized into folders for easy navigation, and you can search for specific files using the built-in search feature. Additionally, you have the option to 'favorite' important items, making them easily accessible through a dedicated Shortcuts menu. The Vault is designed to streamline document management, offering a more efficient and intuitive way to view and retrieve the resources you need.



Invoices

Download PDF and Excel versions of your invoices, which display in descending order. To download either version, click on the ↓ Action column. For more information, see the Bills & Payment section.

Projected Premium Report

The Projected Premium Report provides advance notice of upcoming employee changes in age that impact age-banded voluntary life and/or disability coverage premium for the current bill cycle plus an additional two months. This information is based on the rate and enrollment data available on the report's creation date.

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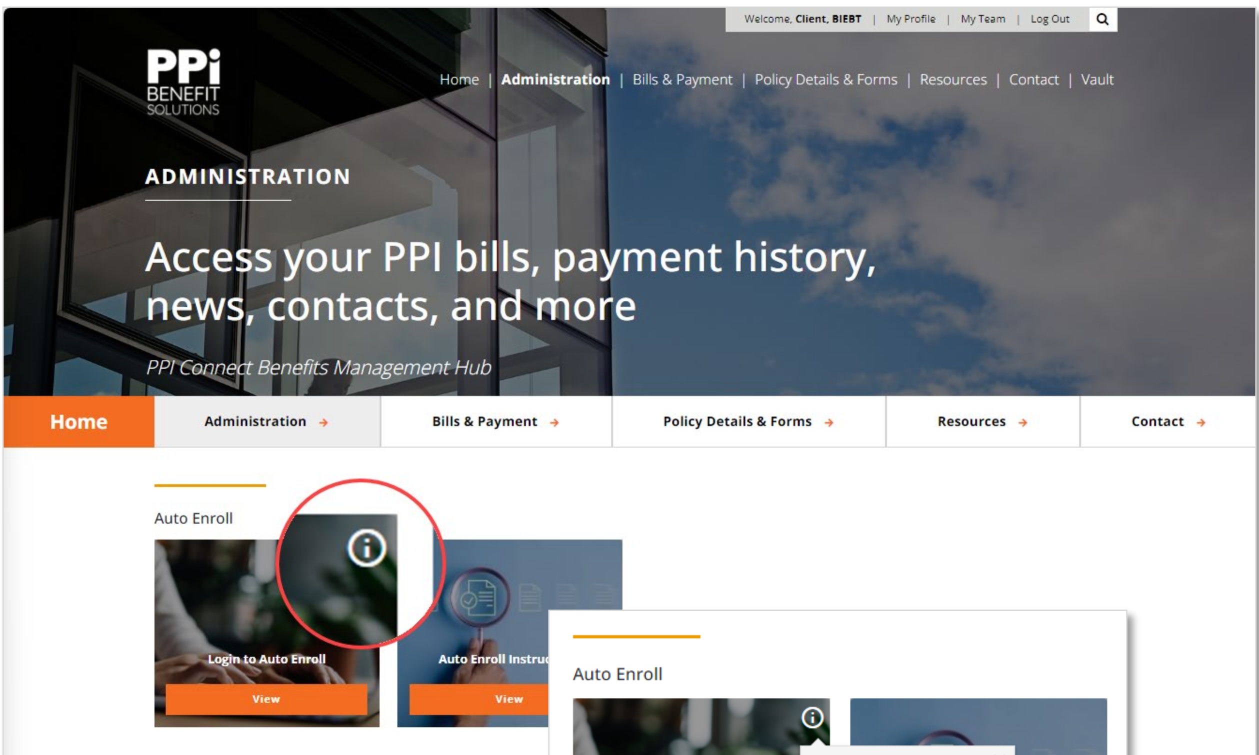
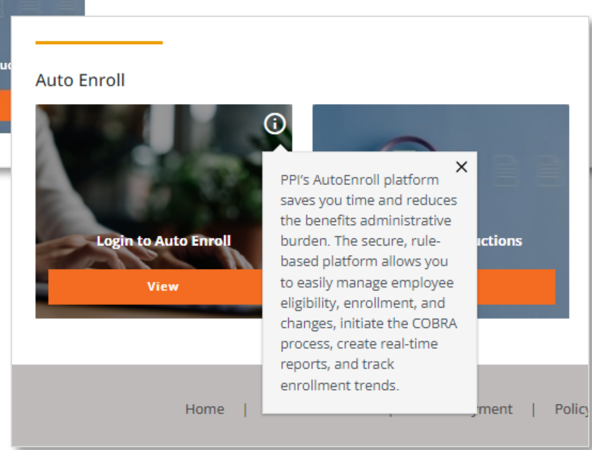
The Administration Tab

AutoEnroll

Go to the AutoEnroll login page from the AutoEnroll login tile, or access AutoEnroll How-to-Guides in the Client Help Center.

Note: Whenever you see a small info icon in the upper right corner of a tile, click it to see a popup with more detail about that topic. Some popups include links for even more information.





Click the info icon to see more detail.

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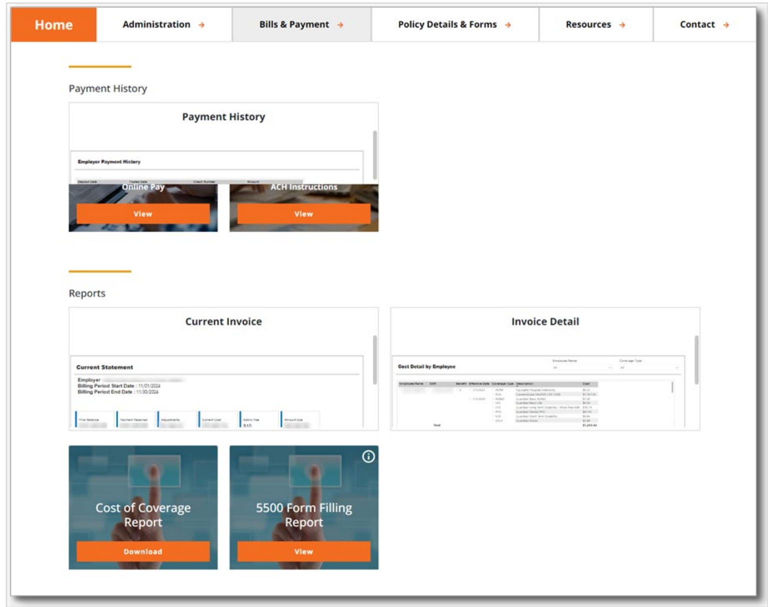
The Bills & Payments Tab

The revamped Bills & Payments section of the portal now features several useful upgrades. The new interface lets all clients view payment summaries, make online payments, and access various reports—even if they don't have online billing.



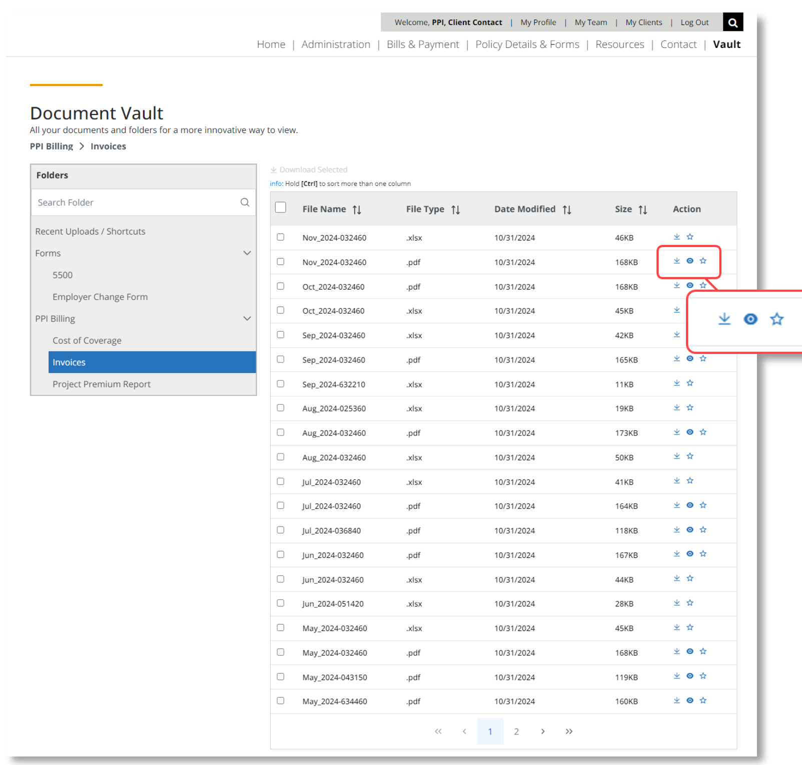
Important Details Regarding the Bills

- Invoices are typically generated around the 21st of the month.
- You will receive an email notification when your bill is ready to be viewed online.
- The cover sheet of your bill will be mailed to you within 3-4 business days.
- **Invoices reflect enrollment changes and/or payments made before the 10th of the month.**
- Payments are due on the 1st day of the following month, with a 30-day grace period.

Accepted forms of payment: checks drawn on your company bank account, money orders, cashier's checks, ACH transfers, and bank wires.

Invoices

The Invoices tile directs you to the Vault, where you can access your current and a rolling 12 months of invoices. From the Action column, select download or favorite the PDF or Excel version or select view from the action menu.



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Payment History

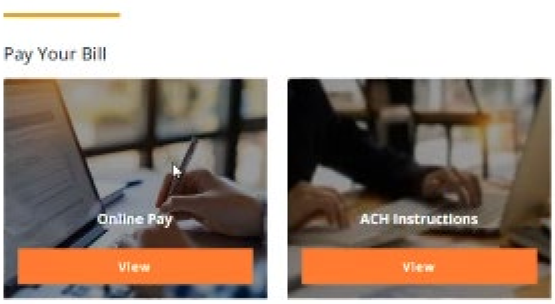
The payment history section displays key details, including the deposit and posted dates, payment method (such as check or ACH), and the total amount paid.

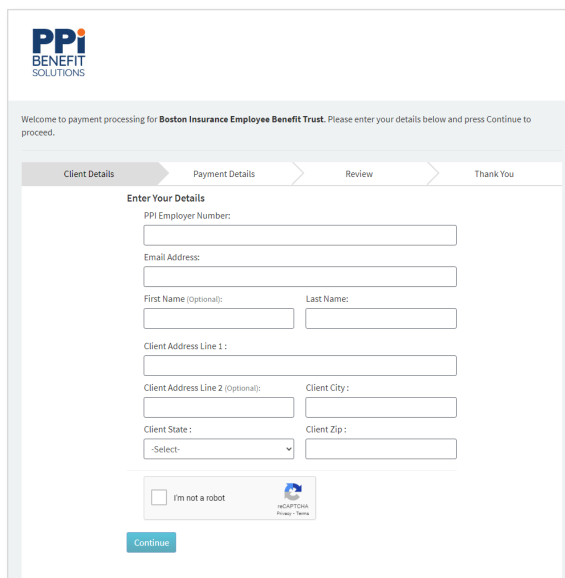
Employer Payment History

Deposit Date	Posted Date	Check Number	Amount
08/26/2024	08/27/2024	WIRE	[illegible]
09/20/2024	09/23/2024	WIRE	[illegible]
10/22/2024	10/23/2024	WIRE	[illegible]

Online Bill Pay

The online bill pay tile directs you to our Bank of America-powered payment system. For ACH or wire transfer instructions, simply click the ACH Instructions tile. You don't need online billing access to use the bill pay system or view the ACH instructions.




PPi BENEFIT SOLUTIONS

Welcome to payment processing for **Boston Insurance Employee Benefit Trust.** Please enter your details below and press Continue to proceed.

Client Details | Payment Details | Review | Thank You

Enter Your Details

PPI Employer Number:

Email Address:

First Name (Optional): Last Name:

Client Address Line 1 :

Client Address Line 2 (Optional): Client City :

Client State : -Select- Client Zip :

I'm not a robot

Continue

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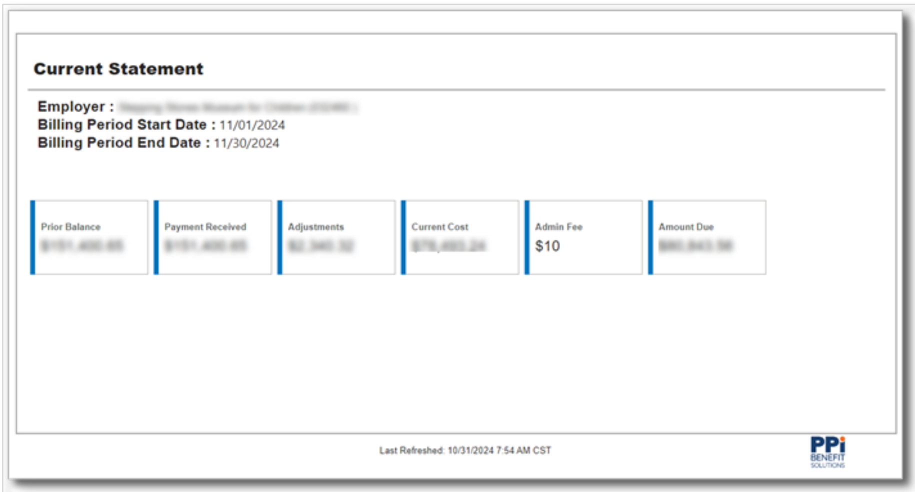
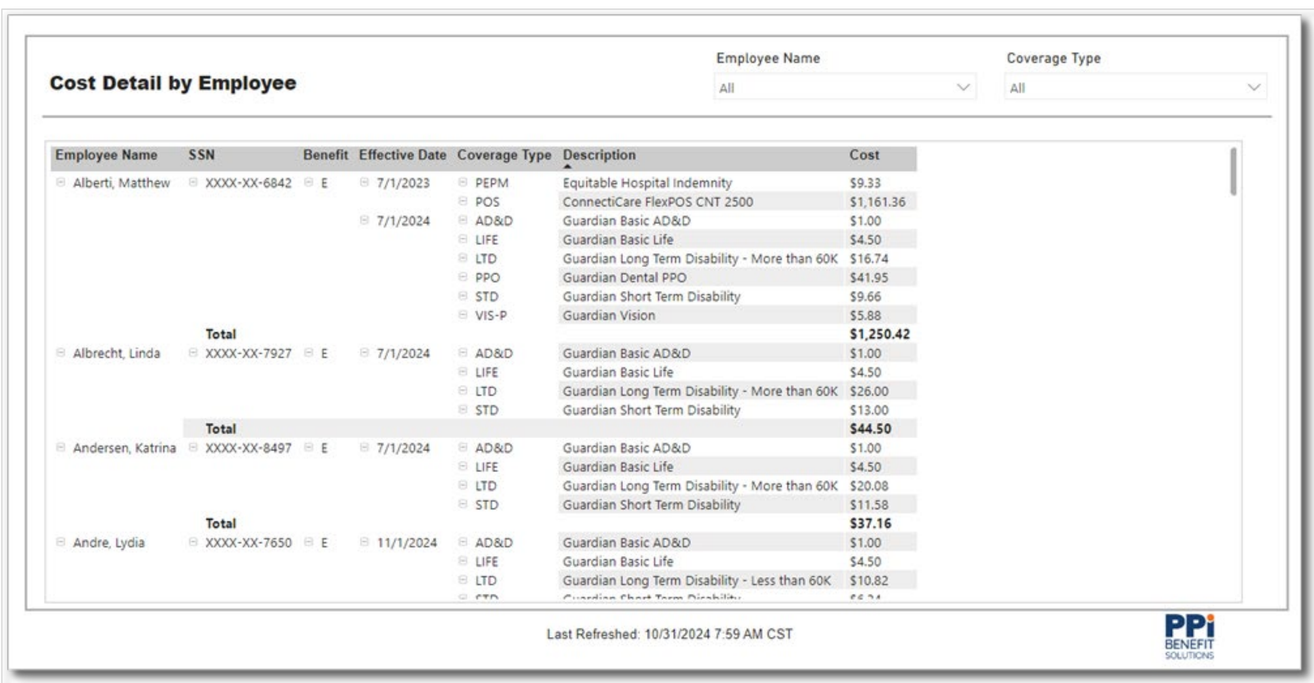
The **Current Invoice Report** is available to clients with online billing and includes a summary page that displays the amount due based on prior balance, payments received, adjustments, current cost, and any administrative fees. Clients with access to multiple divisions or locations can select them from the Employer Name/Number dropdown at the top of the page.



The **Invoice Detail** data show costs by Employee and Coverage type, as on the PDF version of the bill. Here, however, you can filter the report by employee(s), SSNs, or billing date.



Employee Name	SSN	Benefit	Effective Date	Coverage Type	Description	Cost
Alberti, Matthew	XXXX-XX-6842	E	7/1/2023	PEPM	Equitable Hospital Indemnity	$9.33
				POS	ConnectiCare FlexPOS CNT 2500	$1,161.36
			7/1/2024	AD&D	Guardian Basic AD&D	$1.00
				LIFE	Guardian Basic Life	$4.50
				LTD	Guardian Long Term Disability - More than 60K	$16.74
				PPO	Guardian Dental PPO	$41.95
				STD	Guardian Short Term Disability	$9.66
				VIS-P	Guardian Vision	$5.88
	Total					**$1,250.42**
Albrecht, Linda	XXXX-XX-7927	E	7/1/2024	AD&D	Guardian Basic AD&D	$1.00
				LIFE	Guardian Basic Life	$4.50
				LTD	Guardian Long Term Disability - More than 60K	$26.00
				STD	Guardian Short Term Disability	$13.00
	Total					**$44.50**
Andersen, Katrina	XXXX-XX-8497	E	7/1/2024	AD&D	Guardian Basic AD&D	$1.00
				LIFE	Guardian Basic Life	$4.50
				LTD	Guardian Long Term Disability - More than 60K	$20.08
				STD	Guardian Short Term Disability	$11.58
	Total					**$37.16**
Andre, Lydia	XXXX-XX-7650	E	11/1/2024	AD&D	Guardian Basic AD&D	$1.00
				LIFE	Guardian Basic Life	$4.50
				LTD	Guardian Long Term Disability - Less than 60K	$10.82

The **5500** and **Cost of Coverage** Reports are available to all clients (no online billing required). Each tile links to a copy of your report. For more information on each report, please visit the PPI Help Center.

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Form 5500 Filing Report

Each year, PPI files the Annual Return/Report Form 5500 Schedule A for the ACSA and BIEB Group Insurance Trusts. This filing includes all coverages provided and administered through the Trusts, eliminating the need for Trust members to file for these coverages.

Download a copy of the filing confirmation letter, which includes the applicable PPI-administered coverages, by clicking the Download link in the 5500 Filing Report tile.

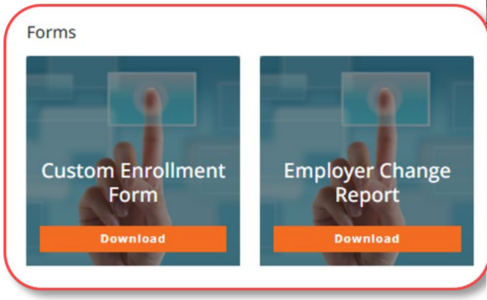
Cost of Coverage Report

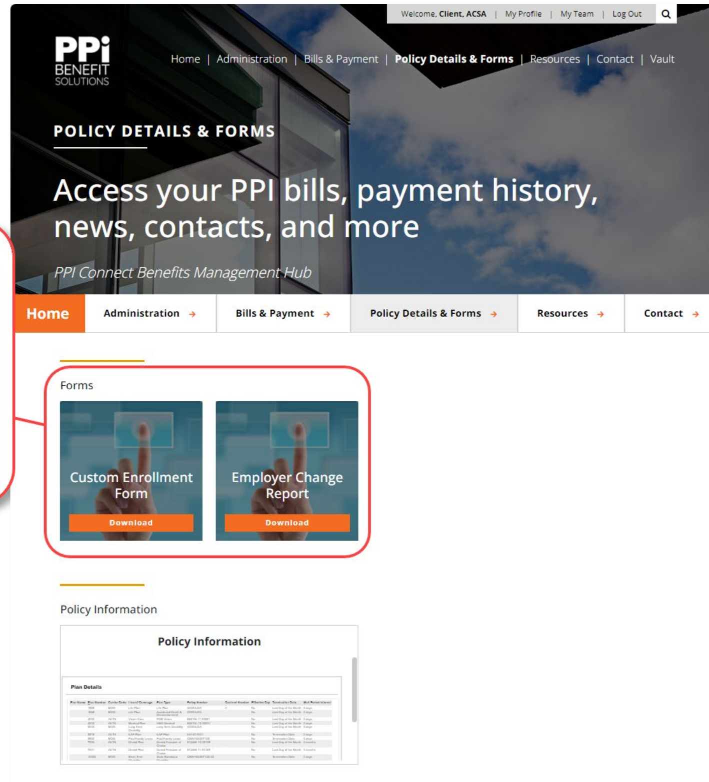
The Cost of Coverage, W2 Report is available to clients with a PPI-billed medical plan and provides medical cost information based on each member's medical plan enrollment by month. You can use this report to assemble cost of healthcare coverage information for mandated ACA W2 reporting.

The Policy Details & Forms Tab

Forms

Use the Forms tiles to access your custom PPI Enrollment Form and the Employer Change form.





Policy Information

Scroll down to the Policy Information tile and click the tile to bring up a list of your PPI-administered coverages with corresponding policy numbers and other details such as plan termination dates and waiting periods.

Plan Details

Plan Name	Plan Number	Carrier Code	Line of Coverage	Plan Type	Policy Number	Contract Number	Effective Day	Termination Date	Wait Period Interval
	1568	MOO	Life Plan	Life Plan	G000AJXA	0	No	Last Day of the Month	0 days
	1668	MOO	Life Plan	Accidental Death & Dismemberment	G000AJXA		No	Last Day of the Month	0 days
	4000	AETN	Vision Care	POS Vision	848104-11-00001		No	Last Day of the Month	0 days
	4002	AETN	Medical Plan	HMO Medical	848104-12-00001		No	Last Day of the Month	0 days
	5003	MOO	Long Term Disability	Long Term Disability	G000AJXA		No	Last Day of the Month	0 days
	5518	AETN	EAP Plan	EAP Plan	EA140-0001		No	Termination Date	0 days
	5900	MOO	Paid Family Leave	Paid Family Leave	GMNY6X007Y25		No	Termination Date	0 days
	7000	AETN	Dental Plan	Dental Freedom of Choice	812466-10-00139		No	Last Day of the Month	0 months
	7001	AETN	Dental Plan	Dental Freedom of Choice	812466-11-00139		No	Last Day of the Month	0 months
	10003	MOO	Short Term Disability	State Mandated Disability	GMNY6X007Y25-02		No	Termination Date	0 days
	10107	MOO	Short Term Disability	State Mandated Disability	GMNY6X007Y25		No	Termination Date	0 days

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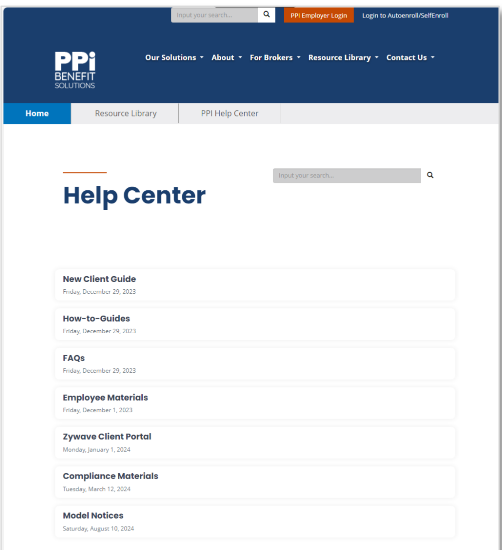
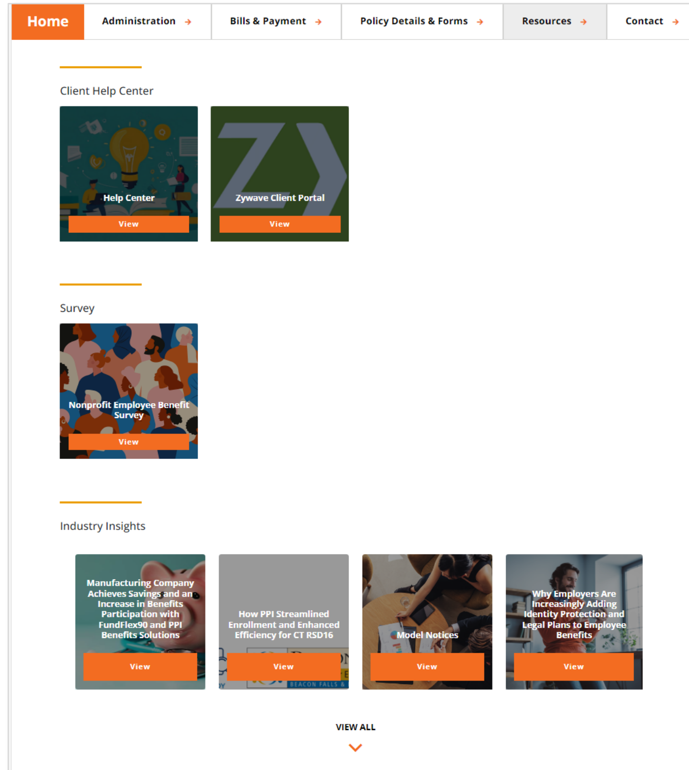
The Resources Tab

Client Help Center

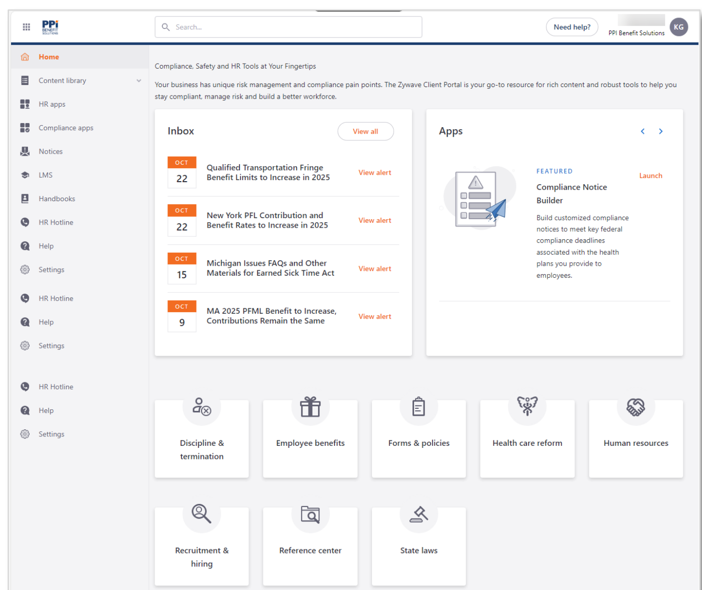
The Help Center tile links directly to the Client Help Center, where you'll find a variety of printable guides and resources for using the AutoEnroll system and navigating ppibenefits.com.





Zywave Client Portal

ACSA and BIEBT Trust members enjoy complimentary access to the Zywave Client Portal, a resource designed to help meet HR and compliance needs. The portal features an extensive HR and compliance library and user-friendly tools for managing HR, benefits, and compliance workflows. Members can also access Zywave's Learning Management System (LMS) and a dedicated HR Hotline for personalized support. More information is available in the PPI Help Center.



Other Resources

The survey offers valuable benchmarking data specific to nonprofit organizations, helping you stay informed and make data-driven decisions. The Industry Insights section provides up-to-date industry news.

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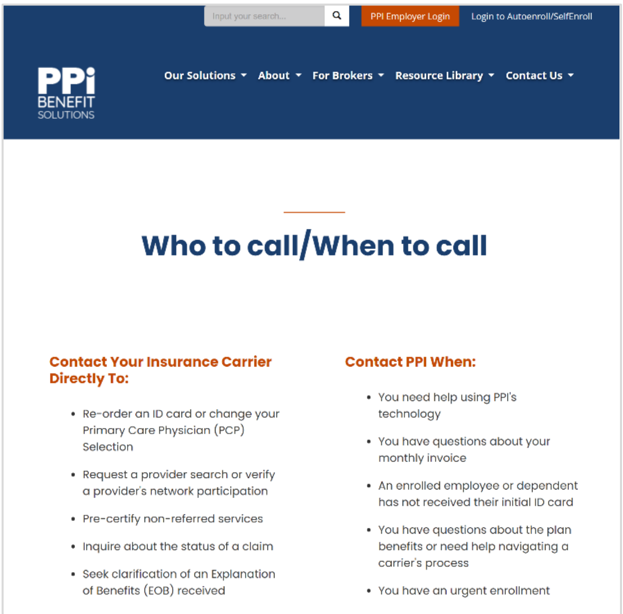
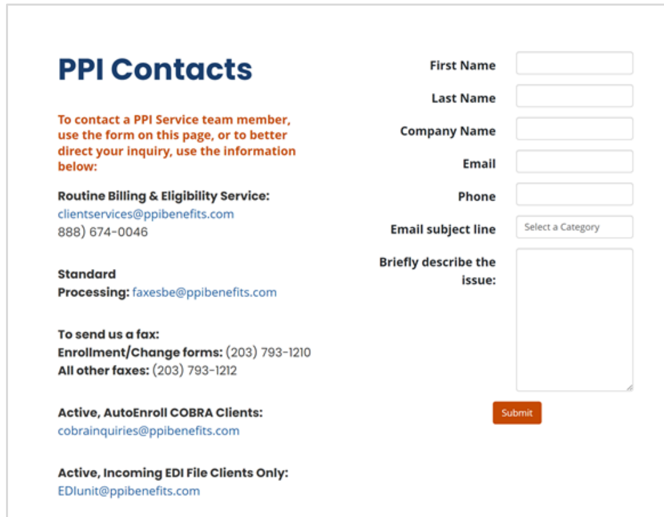
The Contact Tab

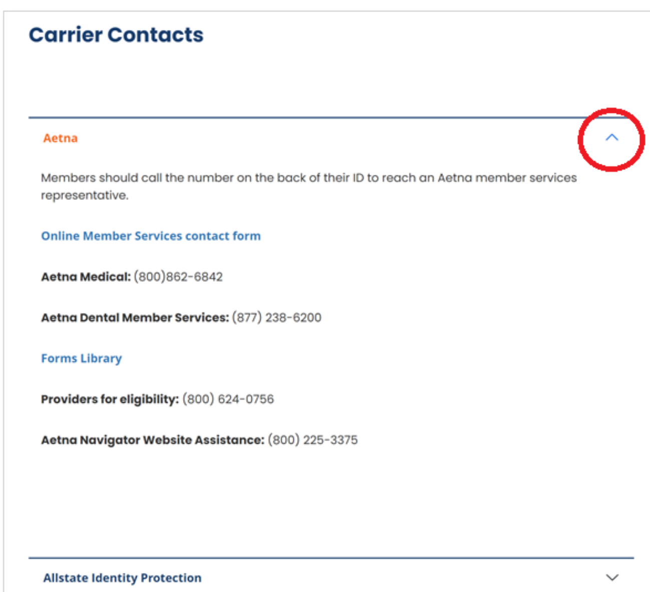
Contacts Us and Carrier Contacts

The **Contact Us** tile links to a list of PPI email addresses and phone numbers and a form to contact us through the web.





The **Carrier Contacts** tile takes you to page with carrier-related website addresses and phone and fax numbers (by coverage type if applicable). Expand the contact information for a particular carrier by clicking the small arrow on the right side of the column.



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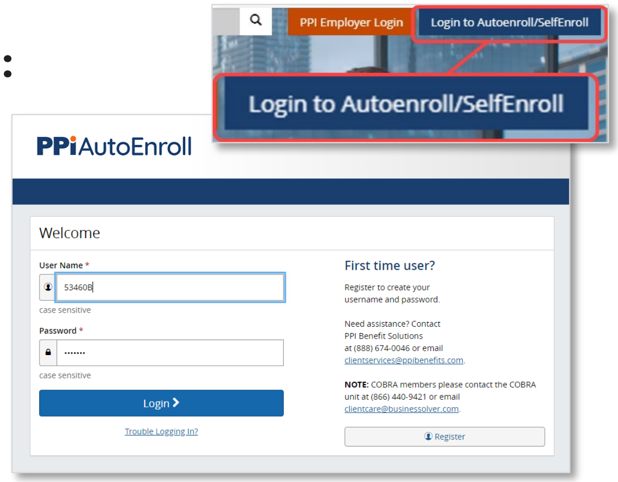
PPI AutoEnroll

Web-based enrollment and eligibility portal:

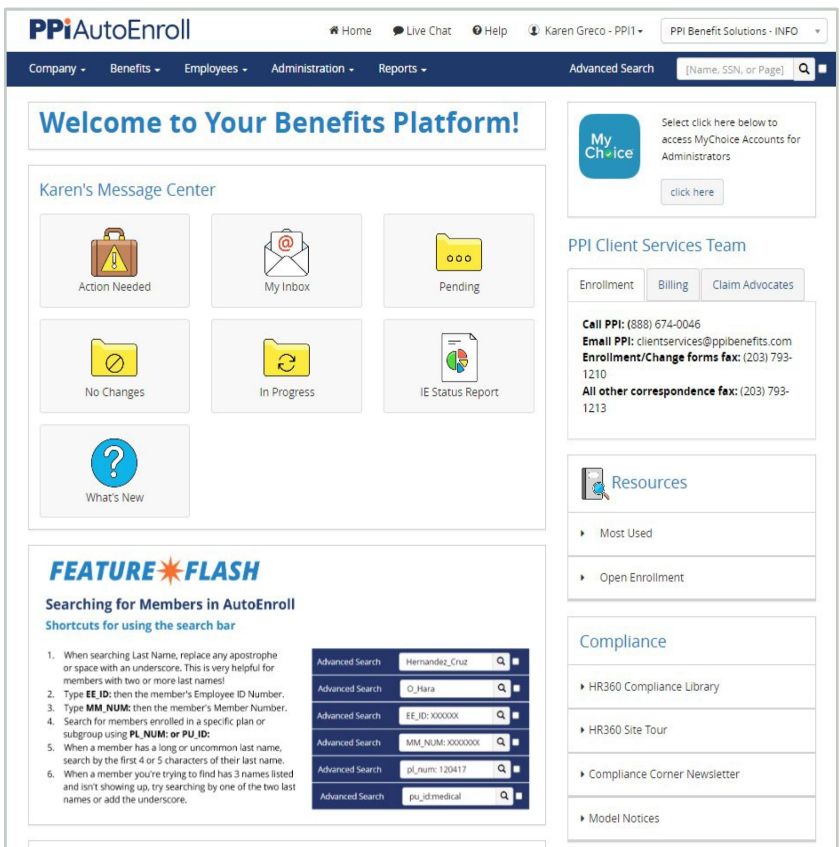


- Process enrollments, terminations, and life-event changes for employees and their dependents
- Access reports, compliance information, and other tools

To log in, go to **www.ppienroll.com**, OR click the blue "AutoEnroll/SelfEnroll Login" button in the upper right corner of **www.ppibenefits.com**.

Enter your PPI-issued username and password, which you should have received in a welcome email from the PPI Client Services team (separate from the Connect portal email invitation). If you misplaced this email or have any trouble logging in, please email: **clientservices@ppibenefits.com.**

Navigating the AutoEnroll Homepage



Search for employees using names or SSNs

Review/Approve Pending Employee Transactions

email and phone numbers for PPI services

Reference Center for helpful how-tos

Helpful tips and important news

Access to online compliance suite, Learning platform, and HR apps

Find step-by-step instructions for using AutoEnroll in the PPI Client Help Center: **ppibenefits.com/Resource-Library/PPI-Help-Center**.

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Notifications and Announcements

All clients are automatically subscribed to our Client Notification email distribution. You and other contacts you designate will receive regular communications including:

- Notification when your bill is ready
- Important notifications when compliance reports become available, as well as service updates, process changes and product announcements
- *Compliance Corner*: a bi-weekly newsletter that addresses current federal and state compliance and regulatory issues
- Urgent "Washington Updates" and Regulatory news

Safe/White-Listing

To ensure delivery of these emails, please add **clientservices@ppibenefits.com** and **clientcommunications@ppibenefits.com** to your contacts.

Follow us on LinkedIn

Follow us at **www.linkedin/company/ppi-benefit-solutions.com.**