shelby HQ Insurance/Retirement

This v.5 module manages the charge structure related to services provided by a denominational office to its staff, related churches and individuals within its jurisdiction. This includes Health Insurance, Life Insurance, Disability, Worker's Compensation, and Retirement.

Features and Benefits

- GlobaFILE: a normalized relational database
- Accounts Receivable integration for invoicing
- General Ledger integration
- Variety of billing frequencies
- Management of user-defined premium/charge structures
- Compatibility with accrual or cash based receivables
- Unlimited number of distinct health insurance types and classes
- Provision of a distinct billing structure for medical benefit proceeds
- Compilation of insurance details in one module
- Unique reports for internal and external entities
- · Management for dependent information and charges

- Creation of Regular charges by reading participant files for insured (church, employer, individual)
- Flexibility in matching your organization's insurance billing structure
- Integration with Accounts Receivable module provides opportunity to consolidate receivable reporting if desired
- User-customized statement designs
- Payments processed in centralized AR module
- Quick and easy rate/premium charges for future billing
- One charge per employer, or detail charges per participant
- History of charges and payments within AR for management of current and aged invoices

Required Modules:

- Accounts Receivable
- General Ledger
- GlobaFILE



Insurance and Retirement - [Employee Information]						
File Edit Records Reports Utility Help						
Employee Information						
Filters In	ers In Employee Jackson, Mrs. Helen (#168) Employer Church of the City (#681)					
All Emplo		×		×		
	<u>1</u> . GlobaFILE	<u>2</u> . Detail	3. Dependent:	;) <u>4</u> . Billing	<u>5</u> . M	emo
	Status	Active 💌	ctive Type Employee HEALTH INSURANCE			
	Hire Date 3/6/2006 Insurance Class Family Coverage					
	Terminated Date		Workers' Comp. (None)			E Christia B, Churg
	Enrolled Date	7/3/2006	hly		- B. Chur	
	Insured Date 7/3/2006 Position Administrator					. B. Chure
	Annual Earnings	\$40,850.00 Use non-standard rates? PreTax? Employer Billed?				
	Life Coverage	\$50,000.00	Category	Rate	Variance Adjus	sted Rate unity Chu
	Disability Coverage	\$32,680,00	Participant	\$247.50	\$0.00	\$247.50 Baptist Ch
	Certificate	1,000,000	Employer Retirement	\$577.50 \$0.00	\$0.00 \$0.00	\$577.50 \$0.00
			Life Insurand		\$0.00	\$0.00
	Hours/Week	40.00	Health Insur		\$0.00	\$825.00
	# Dependents 3					
	Retirement %	5.00%				
•						
				Apply	<u>0</u> K	Cancel and click
Delete.						
- Decision						
Ready						

If you handle insurance and retirement billing for your employees, this module is a must! Create your own packages and types of coverage.