



**The Pension Boards**  
United Church of Christ, Inc.



## **NETSUITE FOR MEMBERS: PORTAL USER GUIDE**

# NEW PORTAL BENEFITS

Review your bill and contact Member Services if any changes are needed. Changes received in good order will be reflected the next business day on the portal.

Make full or partial payments based on your ability to make payments. Prioritize paying your employee benefit coverage first. Don't let medical, dental or life insurance coverage lapse. New flexible options such as the ability to make multiple partial payments during the same monthly billing cycle will now be available.

Save your payment information securely. No need to enter your credit card information each month.

Review your payment history to reconcile your account. View the outstanding balance, historical payment dates and amounts, benefits and more.

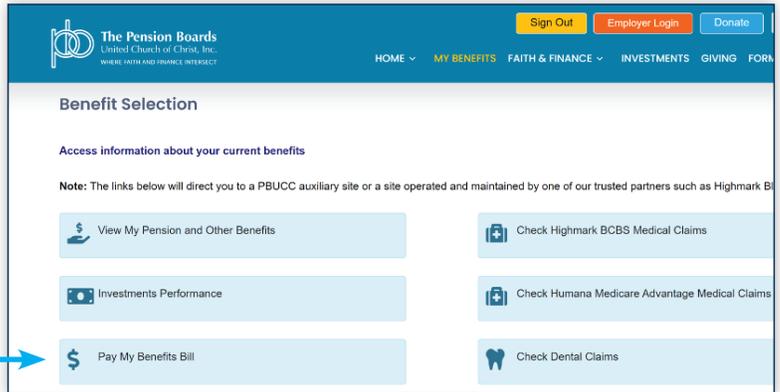
## ACCESS THE NEW PAYMENT PORTAL

Navigate to [www.pbucc.org](http://www.pbucc.org) and log-in using the **Member Account Login** to access your account and the billing portal.

The screenshot displays the website for The Pension Boards, United Church of Christ, Inc. The header includes navigation links: HOME, FAITH & FINANCE, INVESTMENTS, GIVING, FORMS, and NEWS & RESOURCES. A search bar is located in the top right corner. The main content area features a prominent banner for "2023 Clergy Tax Return Preparation Guide for 2022 Returns" and "2023 Federal Reporting Requirements for Churches". A call to action reads "TAX RESOURCES NOW AVAILABLE FOR MINISTERS AND CHURCHES! CLICK HERE". On the left side, there is a "Member Account Login" section with fields for Member ID and Password, a "Show Password" checkbox, and a "Log In" button. Below the login section are links for "Forgot Member ID?" and "Forgot / Reset your password?". An "Important Links" sidebar on the left lists "Pension & Benefits", "Rate Locator", and "Clergy Wellness". The bottom of the page features a row of four illustrative images: a group of people, a person with a smartphone, hands holding a heart, and a document.

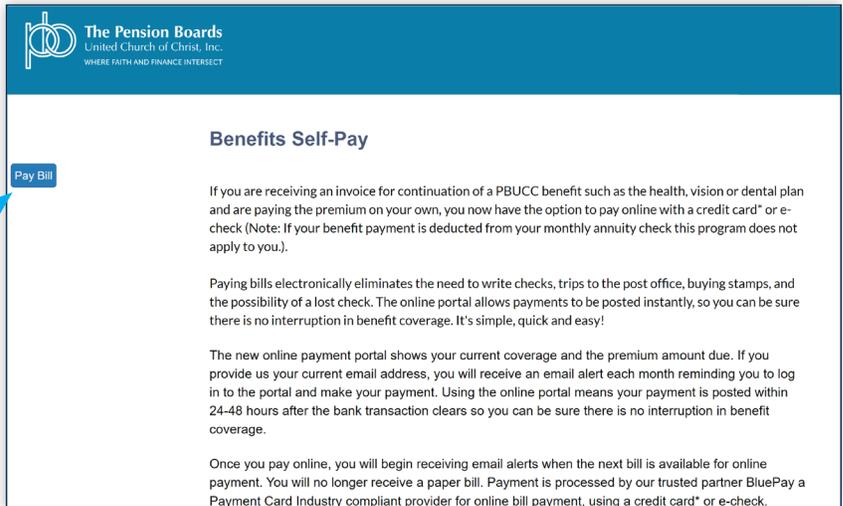
The "Benefits" homepage for the account will open.

Select Pay My Benefits Bill to access the payment portal.



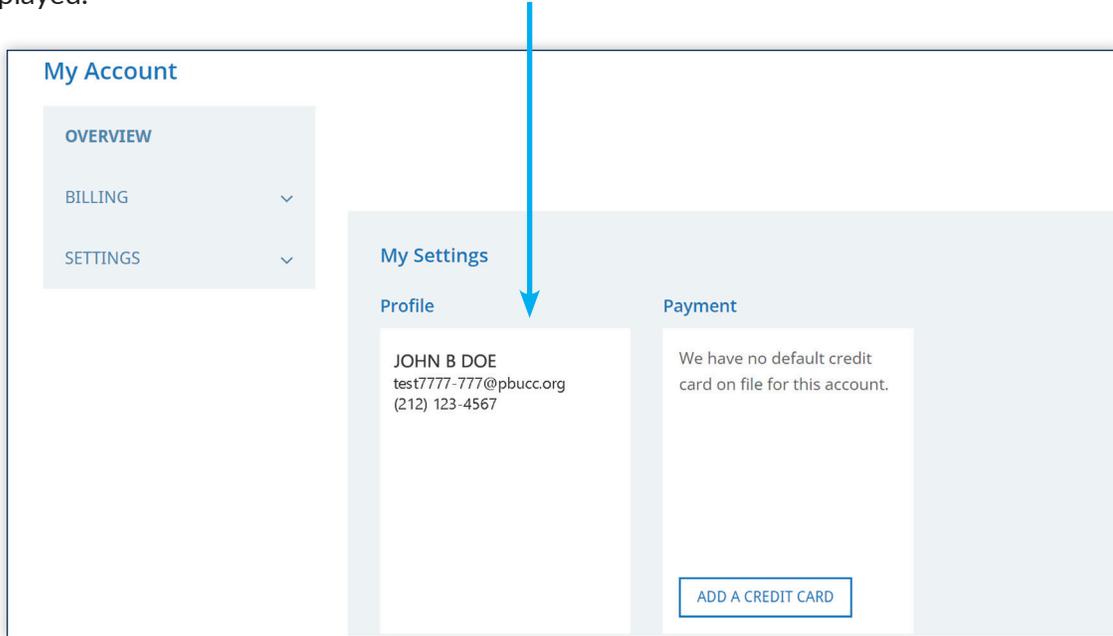
A page with information about Benefit Self-Pay will open.

Select Pay Bill from the side menu.

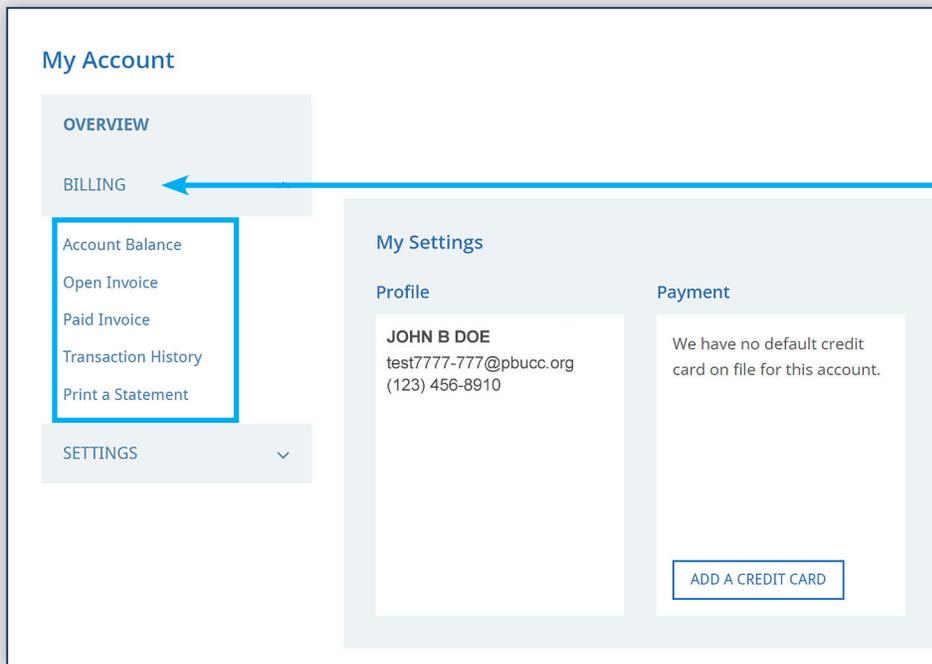


## PAYMENT PORTAL HOME PAGE

The payment portal homepage for the account will open, the name on the account and contact information will be displayed.



## ACCESS ACCOUNT PAYMENT AND BILLING OPTIONS



**Select Billing** to drop down a menu of account payment and billing options.

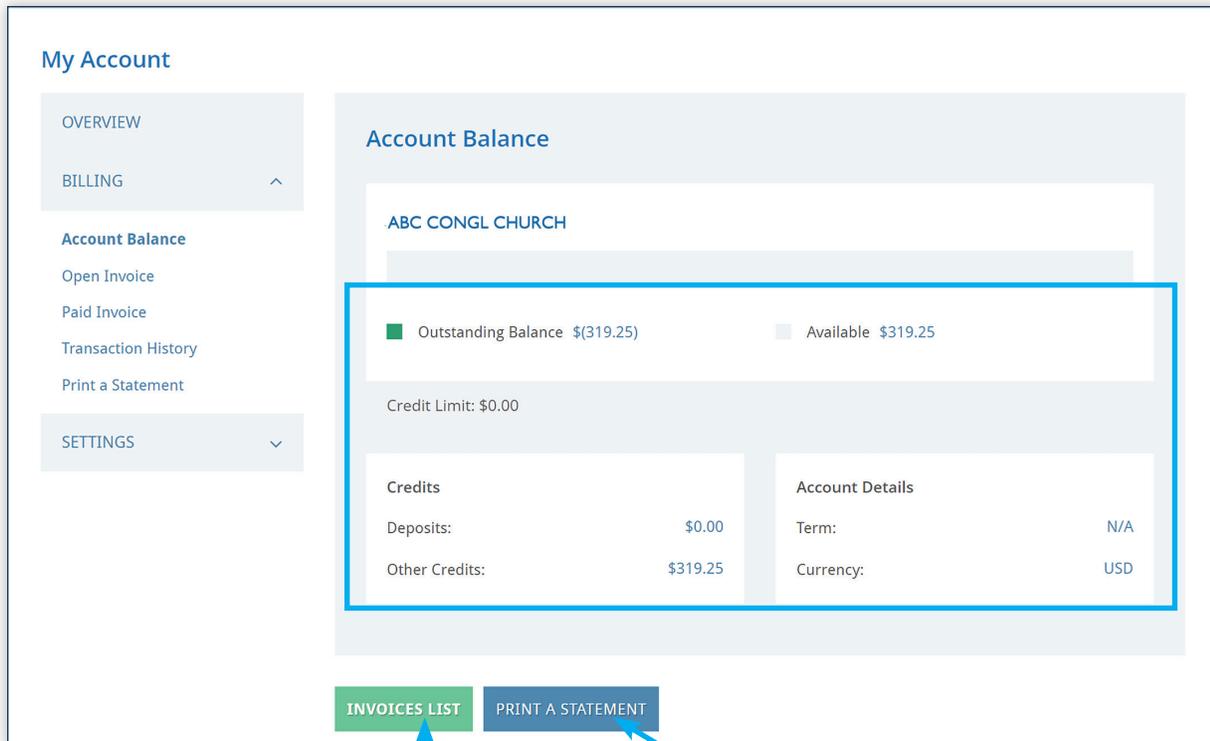
# ACCOUNT BILLING AND PAYMENT OPTIONS

Click the menu links to manage your account:

- Account Balance** Snapshot of outstanding balance and recent credits.
- Open Invoice** View the current invoice and set-up full or partial payments.
- Paid Invoice** Look up and view past invoices by month.
- Transaction History** Look up and view how payments, credits and other transaction types are applied to invoices.
- Print a Statement** Print a statement of account as a list of charges and payments by invoice number and date.

## ACCOUNT BALANCE

The Account Balance screen displays a snapshot of the current account status including the outstanding balance and any credits available.

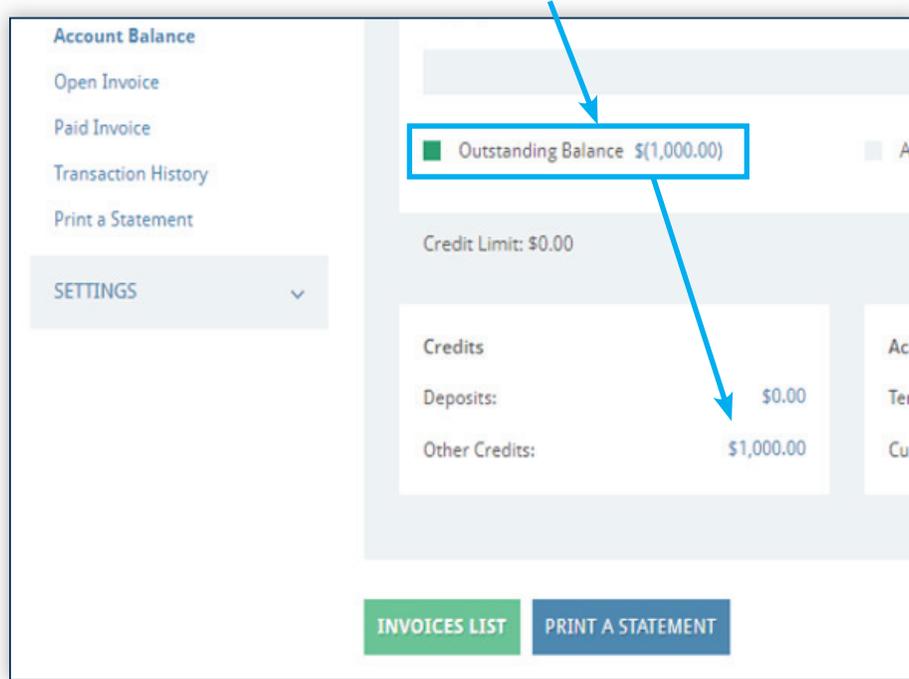


Quick link to view the current open invoice.

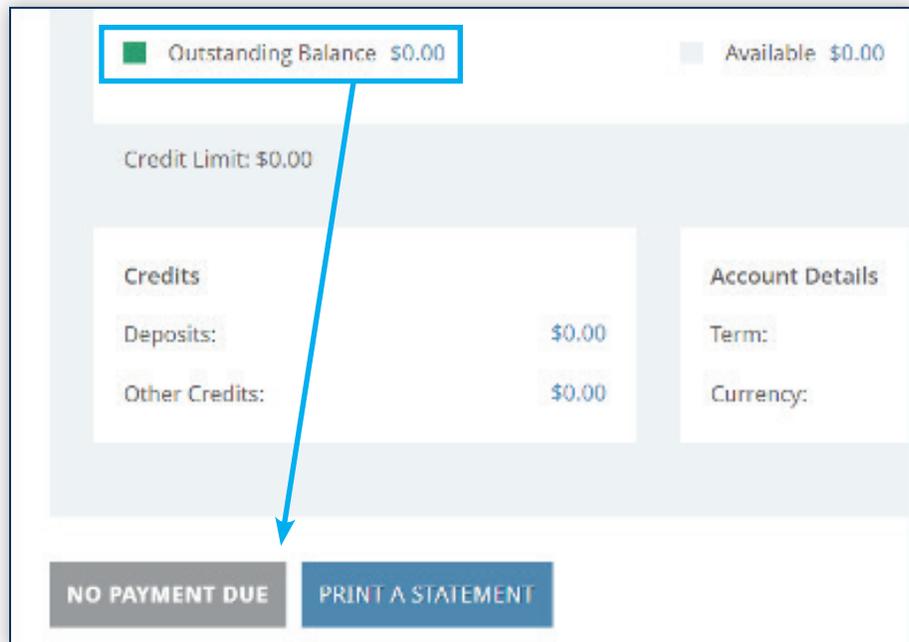
Quick link to print a list of current/past charges.

# ACCOUNT BALANCE

**CREDITS:** If there is an outstanding balance on the Account Balance Screen reflecting a negative dollar amount (amount in parenthesis), this means there is a credit that can be applied to the next bill.



**\$0 BALANCE:** If there are no open invoices, there will be an outstanding balance of \$0.00 and a designation of, "No Payment Due".



# OPEN INVOICE VIEW

The Open Invoice view displays the full invoice with an **Invoice Summary** listing current charges at the top of the page.

Scroll Down to view the **Current Month Invoice Detail** and the **Invoice Detail for Overdue Amounts**.

**My Account**

OVERVIEW

BILLING ^

Account Balance

**Open Invoice**

Paid Invoice

Transaction History

Print a Statement

SETTINGS v

**Open Invoice**

**MAKE A PAYMENT**

**The Pension Boards UCC**  
March 2023 Statement

Date: 2/01/2023  
Due Date: 2/28/2023

Member Name: JOHN DOE  
Member ID: 7777-777

**Invoice Summary for March, 2023**

Benefit	Month/Year	Amount Due	Subtotal Due	Pay
<b>Dental Benefits</b>				
Monthly	October 2022	\$42.50		<input type="checkbox"/>
Monthly	November 2022	\$42.50		<input type="checkbox"/>
Monthly	December 2022	\$42.50		<input type="checkbox"/>
Monthly	January 2023	\$44.25		<input type="checkbox"/>
Monthly	February 2023	\$44.25		<input type="checkbox"/>
Monthly	March 2023	\$44.25		<input type="checkbox"/>
<b>Subtotal Dental Benefits</b>			<b>\$260.25</b>	<input type="checkbox"/>
<b>Health Benefits</b>				
Monthly	October 2022	\$240.00		<input type="checkbox"/>
Monthly	November 2022	\$240.00		<input type="checkbox"/>
Monthly	December 2022	\$240.00		<input type="checkbox"/>
<b>Total Amount Due</b>			<b>\$1,736.25</b>	<input type="checkbox"/>

**Current Month Invoice Detail for March, 2023**

Benefit	Month/Year	Amount Due	Subtotal Due
<b>Dental Benefits</b>			
Monthly	March 2023	\$44.25	
<b>Subtotal Dental Benefits</b>			<b>\$44.25</b>
<b>Health Benefits</b>			
Monthly	March 2023	\$252.00	
<b>Subtotal Health Benefits</b>			<b>\$252.00</b>

**Invoice Detail for Overdue Amounts**

Benefit	Month/Year	Amount Due	Subtotal Due
<b>Dental Benefits</b>			
Monthly	October 2022	\$42.50	
Monthly	November 2022	\$42.50	
Monthly	December 2022	\$42.50	
Monthly	January 2023	\$44.25	
Monthly	February 2023	\$44.25	
<b>Subtotal Dental Benefits</b>			<b>\$216.00</b>
<b>Health Benefits</b>			
Monthly	October 2022	\$240.00	
Monthly	November 2022	\$240.00	
Monthly	December 2022	\$240.00	
Monthly	January 2023	\$252.00	
Monthly	February 2023	\$252.00	
<b>Subtotal Health Benefits</b>			<b>\$1,224.00</b>

# OPEN INVOICE VIEW: SET-UP PAYMENT

Set-Up a payment in Open Invoice View by selecting which amounts you would like to pay.

**Open Invoice**

**MAKE A PAYMENT**

**The Pension Boards UCC**  
March 2023 Statement

Date: 2/01/2023  
Due Date: 2/28/2023

Member Name: JOHN DOE  
Member ID: 7777-777

Invoice Summary for March, 2023

Benefit	Month/Year	Amount Due	Subtotal Due	Pay
<b>Dental Benefits</b>				
Monthly	October 2022	\$42.50		<input type="checkbox"/>
Monthly	November 2022	\$42.50		<input type="checkbox"/>
Monthly	December 2022	\$42.50		<input type="checkbox"/>
Monthly	January 2023	\$44.25		<input type="checkbox"/>
Monthly	February 2023	\$44.25		<input type="checkbox"/>
Monthly	March 2023	\$44.25		<input type="checkbox"/>
Subtotal Dental Benefits			\$260.25	<input type="checkbox"/>
<b>Health Benefits</b>				
Monthly	October 2022	\$240.00		<input type="checkbox"/>
Monthly	November 2022	\$240.00		<input type="checkbox"/>
Monthly	December 2022	\$240.00		<input type="checkbox"/>
Monthly	January 2023	\$252.00		<input type="checkbox"/>
Monthly	February 2023	\$252.00		<input type="checkbox"/>
Monthly	March 2023	\$252.00		<input type="checkbox"/>
Subtotal Health Benefits			\$1,476.00	<input type="checkbox"/>
<b>Total Amount Due</b>			<b>\$1,736.25</b>	<input type="checkbox"/>

Once payment selections are complete, click **Make A Payment** to continue.

To make a partial payment, **elect Individual boxes** next to the payment amount.

*Note: Past due amounts must be paid prior to current month.*

To pay the Total, **Select Total Amount Due**

*Important: Check the boxes. The individual payment elections or total amount due must be selected first, in order to make a payment.*

# OPEN INVOICE: CREDIT CARD PAYMENT

To make a **credit card payment**, Enter your **Payment information**.

**New!** If you are submitting payment via a credit or debit card, enter your information and check the **“Make this my default credit card”** box to safely store your information for future payments!

Once complete, select **Submit**.

### Payment Method

**Credit / Debit Card** Others

Required \*

Credit Card Number \*

XXXX-XXXX-XXXX-XXXX



Expiration Date \*

10 2023

Name on Card \*

JOHN B DOE

Make this my default credit card

[Learn more about safe and secure shopping](#)

**BACK** **SUBMIT**

## OPEN INVOICE: E-CHECK PAYMENT

To make a payment via E-Check, **Select “Others”**, as the payment method and **click the E-Check button**. Next, **click “Submit”** to reach the **Billing Information** screen.

**Make A Payment**  
1. PAYMENT AND REVIEW

**PAYMENT AND REVIEW**

**Payment Method**

Credit / Debit Card  Others

Select

**echeck**

You will be redirected to your external payment site after reviewing your order on next step. Once your order is placed, you will return to our site to see the confirmation of your purchase.

**BACK** **SUBMIT**

**PAYMENT SUMMARY**

Invoices (12)	\$1,736.25
Deposits Subtotal	\$0.00
Credits Subtotal	\$0.00
Payment Total	\$1,736.25

**SUBMIT**

# OPEN INVOICE: E-CHECK PAYMENT

On the Billing Information page, fill in the contact information requested and then select Continue.

Billing Information	
First Name:	<input type="text" value="John"/>
Last Name:	<input type="text" value="Doe"/>
Company Name:	<input type="text"/>
Country:	<input type="text" value="United States"/>
Address:	<input type="text" value="1212 Main Street"/>
	<input type="text"/>
City:	<input type="text" value="Anytown"/>
State/Province:	<input type="text" value="New York"/>
Zip/Postal Code:	<input type="text" value="11112"/>
Phone Number:	<input type="text"/>
Fax Number:	<input type="text"/>
Email Address:	<input type="text" value="test7777-777pbucc.org"/>
<input type="button" value="Continue"/>	

Add Banking information and Select Complete Order to pay the invoice amount.

Order Information	
Order Amount:	\$1,736.25
<a href="#">Secure Transaction</a>	
Electronic Check	
Name on Bank Account:	<input type="text" value="John B Doe"/>
Bank Account Number:	<input type="text" value="XXXXXXXXXXXX"/>
Bank Routing Number:	<input type="text" value="XXXXXXXX"/>
<input type="button" value="Complete Order"/>	

Note: Saving payment information for later use is not currently available for E-Check

# PAID INVOICE

**My Account**

- OVERVIEW
- BILLING ^
- Account Balance
- Open Invoice
- Paid Invoice**
- Transaction History
- Print a Statement
- SETTINGS v

## Paid Invoice

Invoice Date December 2022 📅

**The Pension Boards UCC**  
December 2022 Statement

Date	11/01/2022	
Due Date	11/28/2022	
Member Name	John Doe	
Member ID	7777-777	

**Invoice Summary for December, 2022**

Benefit	Month/Year	Amount	Subtotal
Dental Benefits			
Monthly	December 2022	\$44.25	
Subtotal Dental Benefits			\$44.25
Health Benefits			
Monthly	December 2022	\$252.00	
Subtotal Health Benefits			\$252.00
<b>Total Amount</b>			<b>\$296.25</b>

**Invoice Detail for December, 2022**

Benefit	Month/Year	Amount	Subtotal
John Doe / 7777-777			
Health Benefits - Monthly	December 2022	\$252.00	
Dental Benefits - Monthly	December 2022	\$44.25	
Subtotal John Doe / 7777-777			\$296.25

To review past invoices  
**Select a Month Using the Invoice Date Box**

Similar to Open Invoice, the **Paid Invoice** screen provides an Invoice Summary and Invoice Detail section.

11

# TRANSACTION HISTORY

Transaction History provides a look-up function to track how payments, credits and other transactions have been applied.

Different viewing options are available.

1. Select a date range

2. Select a Record Type from the drop-down menu or choose to Show All:

**My Account**

- OVERVIEW
- BILLING** ^
- Account Balance
- Open Invoice
- Paid Invoice
- Transaction History**
- Print a Statement
- SETTINGS v

### Transaction History

From  to

Show all record types v | by Date v

Number	Date	Status
Payment #PYMT3505	03/06/2023	Cancelled
Payment #PYMT3504	03/05/2023	Cancelled
Payment #PYMT3442	02/14/2023	Deposited

Dropdown menu options:  
Show all record types  
Show Credit Memo  
Show Payment  
Show Deposit  
Show Deposit Application  
Show Invoices  
Show Cash Receipts

# TRANSACTION HISTORY

A list of transactions with the chosen record type and date range will populate.

**My Account**

Transaction History

From: 2023-01-01 to: 2023-03-07 Show all record types

Number	Date	Amount
Payment #PYMT3505	03/06/2023	\$85.01
Payment #PYMT3504	03/05/2023	\$1,348.75
Payment #PYMT3442	02/14/2023	\$11,087.17

3. Click an individual **Payment Number** to open a list of invoices where that payment or transaction has been applied

**My Account**

Payment #PYMT3442

Date: 02/14/2023 Status: Deposited \$11,087.17

DOWNLOAD AS PDF

INVOICES

Number	Date	Disc	Amount
Invoice #INV382817	09/01/2022	\$0.00	\$216.48
Invoice #INV372956	09/01/2022	\$0.00	\$1,010.63
Invoice #INV372955	09/01/2022	\$0.00	\$202.13
Invoice #INV372953	09/01/2022	\$0.00	\$216.49
Invoice #INV372954	09/01/2022	\$0.00	\$202.13
Invoice #INV363675	10/01/2022	\$0.00	\$202.13
Invoice #INV363674	10/01/2022	\$0.00	\$216.49
Invoice #INV363676	10/01/2022	\$0.00	\$202.13
Invoice #INV363677	10/01/2022	\$0.00	\$1,010.63
Invoice #INV381841	10/01/2022	\$0.00	\$216.48
Invoice #INV354200	11/01/2022	\$0.00	\$216.49
Invoice #INV354202	11/01/2022	\$0.00	\$202.13
Invoice #INV354202	11/01/2022	\$0.00	\$202.13
Invoice #INV354201	11/01/2022	\$0.00	\$202.13
Invoice #INV354203	11/01/2022	\$0.00	\$1,010.63
Invoice #INV380826	11/01/2022	\$0.00	\$216.48
Invoice #INV344528	12/01/2022	\$0.00	\$202.13
Invoice #INV379777	12/01/2022	\$0.00	\$216.48
Invoice #INV344527	12/01/2022	\$0.00	\$202.13
Invoice #INV344526	12/01/2022	\$0.00	\$216.49
Invoice #INV344529	12/01/2022	\$0.00	\$1,010.63
Invoice #INV334838	01/01/2023	\$0.00	\$202.13
Invoice #INV334837	01/01/2023	\$0.00	\$202.13
Invoice #INV378818	01/01/2023	\$0.00	\$216.48
Invoice #INV334839	01/01/2023	\$0.00	\$1,010.63
Invoice #INV334836	01/01/2023	\$0.00	\$216.49
Invoice #INV385558	02/14/2023	\$0.00	\$216.49
Invoice #INV385616	02/14/2023	\$0.00	\$1,010.63
Invoice #INV385617	02/14/2023	\$0.00	\$319.25
Invoice #INV385559	02/14/2023	\$0.00	\$216.49
Invoice #INV389058	02/18/2023	\$0.00	\$85.01

Payment Total: \$11,087.17

**Invoice #INV385616** \$1,010.63

Invoice Date: 02/14/2023 Status: Paid In Full  
Due date: 02/28/2023

PRODUCT (1)

117	\$0.00
SKU: 117	This item is no longer available
Quantity: 1	Amount: \$1,010.63

BILLING

Terms: 28th of the Month

SUMMARY

Subtotal 1 Item	\$1,010.63
Tax Total	\$0.00
Shipping	\$0.00
Handling	\$0.00
TOTAL	\$1,010.63

ADJUSTMENTS

Payment #PYMT3442	(\$1,010.63)
Amount Due	\$0.00

DOWNLOAD AS PDF

4. Click an individual **Invoice Number** to open a detail screen showing the invoice status and summary.

COMING  
IN MAY  
2023

## PRINT A STATEMENT

Use **Print A Statement** to view or print a list of charge and payments by Invoice Number and date.

Select the **invoice statement date**

Next, **Select: Consolidated Statement** or another option

Last, **Click Download as PDF** to save or print a PDF copy of your records.

The screenshot shows the 'My Account' portal interface. On the left, a navigation menu includes 'OVERVIEW', 'BILLING', and 'SETTINGS'. Under 'BILLING', there are links for 'Account Balance', 'Open Invoice', 'Paid Invoice', 'Transaction History', and 'Print a Statement'. The 'Print a Statement' link is highlighted with a blue box. On the right, the 'Print A Statement' form is displayed. It has a 'Required \*' section with a 'Statement date \*' field containing '2023-02-01'. Below this is a 'Start date (optional)' field. There are three checkboxes: 'Print in customer's locale' (unchecked), 'Show only Open Transactions' (unchecked), and 'Consolidated Statement' (checked). At the bottom of the form are two buttons: 'DOWNLOAD AS PDF' (green) and 'EMAIL' (blue). Three blue arrows point from the text instructions on the left to the 'Print a Statement' link, the 'Consolidated Statement' checkbox, and the 'DOWNLOAD AS PDF' button.

# NETSUITE FOR MEMBERS: PORTAL USER GUIDE



**The Pension Boards**  
United Church of Christ, Inc.