

Employer Contacts and Reporting

Invoice, reporting and employer portal contacts



Use this form to designate contacts for administrative invoices, scheduled reports, and employer portal access. New clients complete it during setup; current clients may use it to add, remove, or update contacts.

Return the completed form to onboarding@marinbenefits.com

Submission Reason	☐ New setup ☐ Update to existing contacts	Submission Date	
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ADMINISTRATIVE INVOICE RECIPIENTS

Invoices are emailed during the first week of each month for the prior month's services. Review each invoice promptly.

Recipient Name	Email Address

SCHEDULED REPORTING

Reports are available in the employer portal or may be delivered on a schedule. Select the reports and frequency for each recipient.

Email Address	Account Balances	Reconciliation Reporting
	☐ Monthly	☐ Daily ☐ Weekly ☐ Monthly
	☐ Monthly	☐ Daily ☐ Weekly ☐ Monthly
	☐ Monthly	☐ Daily ☐ Weekly ☐ Monthly
	☐ Monthly	☐ Daily ☐ Weekly ☐ Monthly
	☐ Monthly	☐ Daily ☐ Weekly ☐ Monthly
	☐ Monthly	☐ Daily ☐ Weekly ☐ Monthly

EMPLOYER PORTAL USERS

Employer portal users can view participant and account information, run reports, and request replacement benefit cards when available. Enrollment and participant information changes, including new enrollments, are handled through Marin Benefits rather than through the portal. Each user must have an individual email address and mobile number for one-time passcodes. Access remains active until Marin Benefits is notified to remove the user.

Name	Email Address	Mobile Phone	Request
			☐ Add ☐ Remove
			☐ Add ☐ Remove
			☐ Add ☐ Remove
			☐ Add ☐ Remove
			☐ Add ☐ Remove
			☐ Add ☐ Remove