BERNIEPORTAL

FEATURE LOOKBOOK

See how BerniePortal manages all of HR in one convenient location
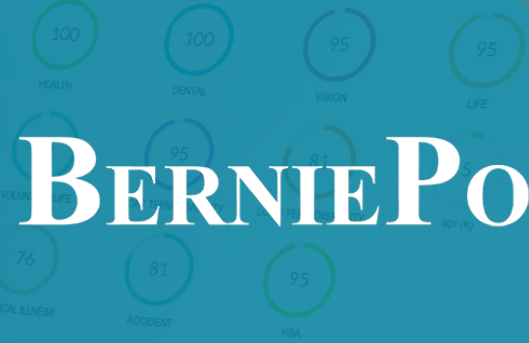
ABOUT BERNIEPORTAL

The fragmented HR ecosystem gave us a headache, so we built a solution.

BerniePortal is an all-in-one HR platform that saves time, cuts the paperwork, and helps build better employee experiences.

We launched BerniePortal in 2008 out of our sister company, benefits brokerage Bernard Health. We saw firsthand the challenges small businesses like our own faced when it came to HR, and we wanted to build a solution that combines great technology with trusted advice.

BerniePortal connects the fragmented HR ecosystem in a comprehensive all-in-one HR tool, allowing employers to spend less time on administration, and more time building the businesses they love.

PCMAG.COM

BerniePortal's user interface (UI) is uncluttered, and uses modern, attractive colors and fonts. Wrapping up something as complicated as an HR platform in such a streamlined package is an impressive feat, and one the BerniePortal team accomplished well.

Rob Watts, PC Mag

TRAVIS MEDICAL

The technology is impressive, easy to set-up and use, and continuously improved based off of user feedback. This allows for HR teams and business owners to stay focused on the business and the people that make the business 'go,' rather than worrying about administrative tasks that eat away at the bottom line.

Jamy Conrad, Travis Medical

2008
Year founded

120,000
Active users in all 50 states

"Excellent"
Quality Rating by PC Mag

2

ALL OF HR IN ONE PLACE – *finally!*

BerniePortal allows you to manage all your HR needs in one convenient location.

Save time

Simplify HR Administration

Improve Compliance

THE EMPLOYEE LIFECYCLE

APPLICANT TRACKING

ONBOARD

BENEFITS

PTO

TIME

PAYROLL

COMPLIANCE

PERFORMANCE MANAGEMENT

1095-C

COBRA

BERNIEPORTAL APPLICANT TRACKING

Find the best candidates faster by bringing your recruitment online.

Interested in learning more about BerniePortal's Applicant Tracking feature?

LEARN MORE

Partnered with:

indeed®

Attract Applicants

Studies show the best candidates are off the market in 10 days. That's no problem with BerniePortal's Indeed integration. Attract the job site's more than 200 million monthly job seekers and have their applications entered automatically into BerniePortal!

Manage Candidates

With resumes, emails, and multiple hiring decision-makers, it can be difficult and time-consuming to keep track of applicants. Use BerniePortal Jobs to share candidate applications, messages, internal feedback, and hiring stages with all hiring decision makers.

Offer & Onboard

Made a new hire? Transition seamlessly from hiring to onboarding. BerniePortal has a full onboarding solution including W-4s, W-9s, I-9s, customizable forms and agreements.

BERNIEPORTAL ONBOARDING

First days should be about getting to work, not paperwork. Have new hires hit the ground running with online onboarding.

Interested in learning more about BerniePortal's Onboarding feature?

LEARN MORE

Save Time

An employee's first day is crucial — free up this valuable time by using BerniePortal's onboarding software. Get your new hire fully onboarded from any location before their first day.
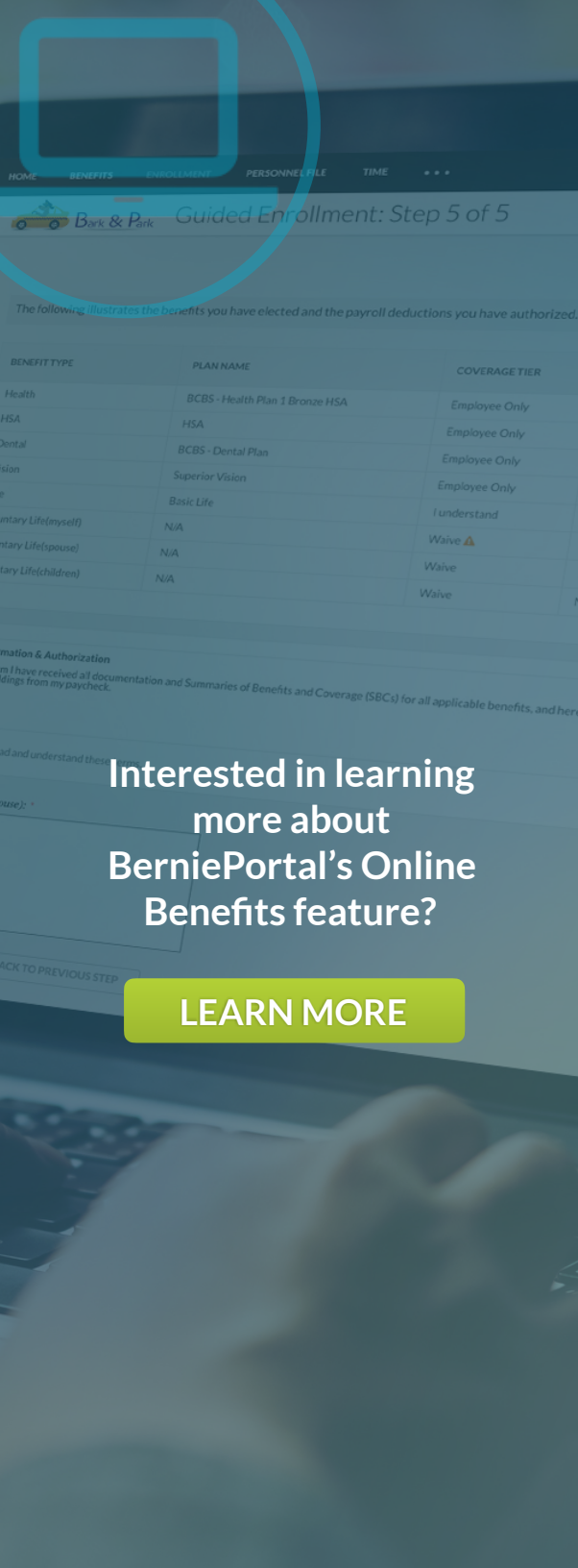
Eliminate Paperwork

Paperwork is time-consuming and hard to manage. BerniePortal collects employee onboarding information and automatically transfers it onto official new hire forms like the W-4, I-9 or W-9.

Track New Hires

Track new hire data such as onboarding progress and turnover. Easily send reminders within BerniePortal to new hires who need to finish the process and ensure compliance.

BERNIEPORTAL ONLINE BENEFITS

Benefits can be complicated, but enrollment doesn't have to be.

Interested in learning more about BerniePortal's Online Benefits feature?
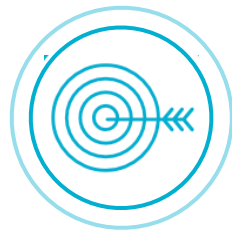
LEARN MORE

Offer Better Benefits

Provide competitive benefits no matter your size. BerniePortal makes it easy to administer ancillary options, which saves time and gives employers the ability to offer more benefits.

Boost Employee Engagement

BerniePortal guides employees through enrollment by embedding informational tools into the benefits election process, including a shopping cart functionality that makes picking a plan more like online shopping. Include video content, plan descriptions, helpful links and other tips and tricks for your team.

Simplify Open Enrollment

Enrolling in benefits shouldn't be complicated. Simplify this process by bringing open enrollment online. Easily edit benefit settings, manage elections, enable employee self-service, review pending coverage and view outstanding benefits enrollments directly in BerniePortal.

BERNIEPORTAL INTEGRATIONS

Leading carrier and payroll providers integrate with BerniePortal, so that your employee data doesn't get lost in translation.

Interested in learning more about the integrations BerniePortal offers?

LEARN MORE

Carrier & Payroll Integrations

We integrate with leading insurers via EDI and API technology, as well as proprietary carrier form mapping. Use BerniePortal to integrate with leading payroll providers like ADP, Paycor and Proliant. Create new payroll records and make changes easily.

Optimize HR

In addition to our carrier and payroll partners, other vendors such as Indeed and BenefitsGuide integrate with BerniePortal to make administering benefits and HR simple.

BernieBill

Select carriers issue accurate, real-time insurance bills directly through BerniePortal via BernieBill. Easily generate and download carrier bills on-demand and with up-to-date benefits enrollment data, saving time, eliminating manual data entry, and reducing errors.

BERNIEPORTAL PTO TRACKING

Don't waste your time tracking your team's free time.

Interested in learning more about the BerniePortal's PTO Tracking feature?

LEARN MORE

Streamline Requests & Approvals

All of PTO in one place. Employees can request, and managers can approve, PTO directly from their BerniePortal accounts, and managers can view an organizational-wide PTO calendar at a glance, making it easy to see who is out of the office on a given day.

Employee Access

Employees can self-manage PTO, saving time for the HR department. Team members can easily track balances, request time off and edit or cancel PTO requests.

Customize PTO Policy

From accrual to lump sum, BerniePortal accommodates a variety of paid time off policies. Find the perfect fit by customizing BerniePortal to the specific PTO needs of your organization.

BERNIEPORTAL TIME & ATTENDANCE

Time management without the time commitment.

Interested in learning more about the BerniePortal's Time & Attendance feature?

LEARN MORE

Clock In & Out

Employees can easily clock in and out via BerniePortal's homepage or through the BerniePortal smartphone app on their computers, smartphones or tablets.

Adjust Timesheets

Need to make a change to a timesheet? If an employee forgets to clock in or out, editing hours is easy online and with BerniePortal for both employees and managers.

Track Attendance

Review employee hours and export for payroll, and track key time and attendance data to gain insight into your organization's performance.

BERNIEPORTAL COMPLIANCE

Streamline and track compliance communication across your team.

Interested in learning more about the BerniePortal's Compliance & Notices feature?

LEARN MORE

Stay Compliant

Easily keep employees updated on company-wide announcements and policy changes.Assure compliance by requiring employee e-signatures and storing them in BerniePortal year-round. Even monitor which employees have viewed and which have signed each company notice directly from your dashboard view.
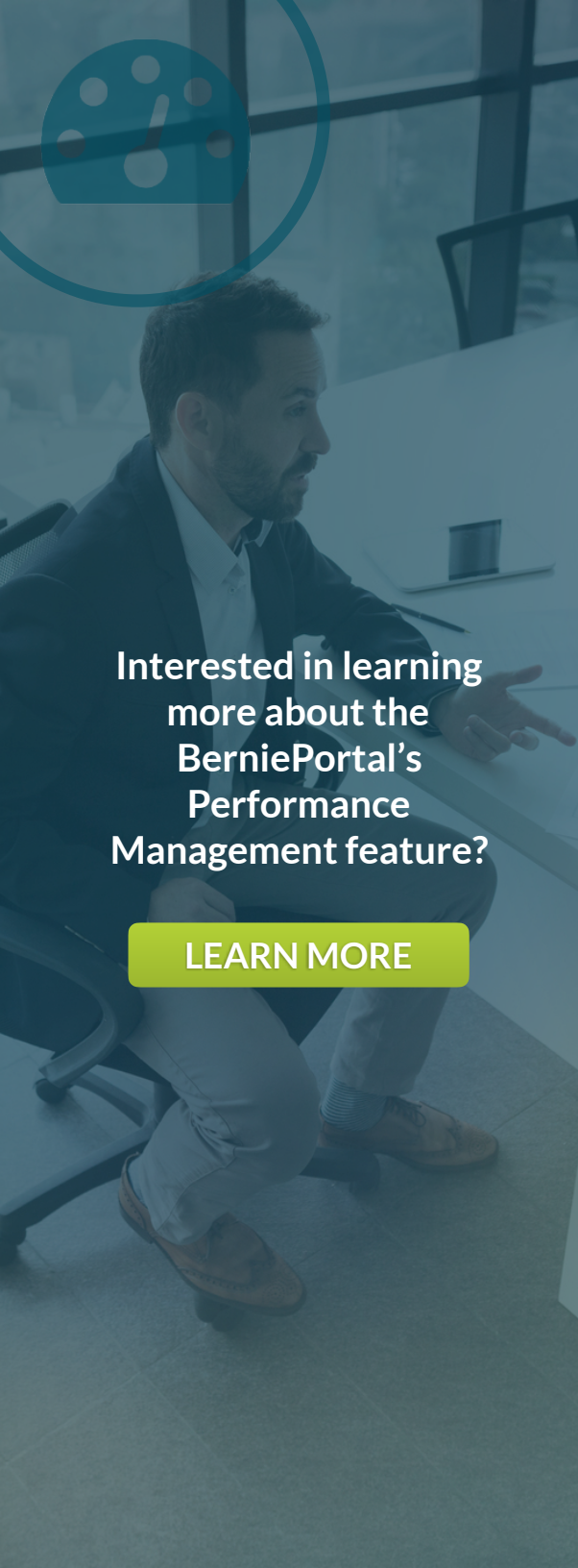
Customize Recipients

Need to send a notice to a select group of employees? BerniePortal has got you covered! Just create the notice, select a subgroup and send! Whether your notice is company-wide, segmented, or individually focused, BerniePortal can deliver your messages to the correct employees.

Send Friendly Reminders

Monitor which employees have viewed and which have signed each company notice directly from your dashboard view. Are any employees dragging their feet? Send individual or group reminders to complete the required documents. all without leaving BerniePortal!

BERNIEPORTAL PERFORMANCE

Inspire employee excellence with ongoing communication and feedback.

Interested in learning more about the BerniePortal's Performance Management feature?

LEARN MORE

Manage 1:1 Meetings

Manage 1:1 agendas, summaries, and back and forth messaging in one central hub. Increase clarity around job performance and goals and easily track employee progress. Utilize BerniePortal's Performance Management feature to maintain organization and consistency, ensuring that managers and employees stay on the same page.

Promote Employee Development

At BerniePortal, we understand the importance of continuous and high-quality feedback to improve performance and inspire employees. This tool creates an open forum for team members to discuss challenges, goals, and career development opportunities.

Document and Track

Create time-stamped documentation of important conversations and events across an employee's lifecycle with BerniePortal. Allow HR to access and view message threads to track progress and promote employee success. Additionally, you can transfer entire threads to new managers at any time.
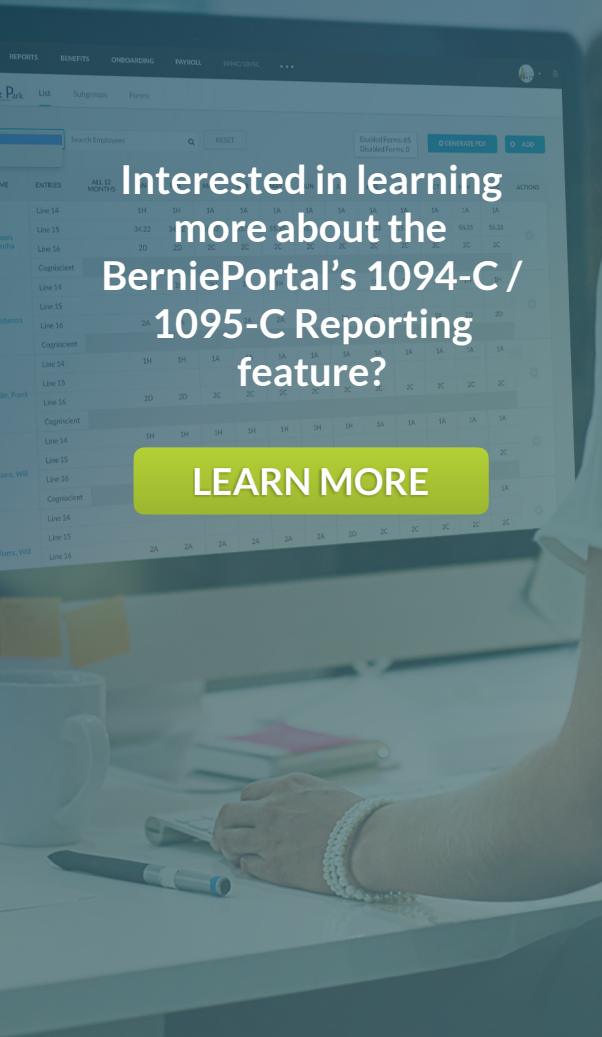
Nurture Relationships

Build strong workplace relationships to nurture a positive and transparent company culture. Encourage employees with positive reinforcement, engaging and constructive conversations, and an open forum for feedback.

BERNIEPORTAL 1094-C / 1095-C REPORTING

Increase compliance and save time with BerniePortal 1094-C/1095-C Reporting.

Interested in learning more about the BerniePortal's 1094-C / 1095-C Reporting feature?

LEARN MORE

1094-C / 1095-C Reporting

Using benefit data already in BerniePortal, generating 1094-C/1095-C is painless. BerniePortal takes this data and transfers it onto official forms, so you don't have to.

File Directly with the IRS

BerniePortal can electronically file forms directly with the IRS, saving time and reducing errors.

Distribute Employee Forms

Get the right documents to the right employees at the right time. BerniePortal 1094-C/1095-C mailing services keep you compliant by ensuring that employees receive the proper documents on time.

BERNIEPORTAL COBRA ADMINISTRATION

COBRA Administration is a hassle. BerniePortal makes it easy. Here's how it works:

Interested in learning more about the BerniePortal's COBRA Administration feature?

LEARN MORE

Distribute Notices

BerniePortal COBRA Services monitors new hires and terminations and sends notices so you don't have to.

Facilitate COBRA Enrollment

BerniePortal COBRA Administration distributes COBRA welcome letters and eligibility information to employees and notifies employers when coverage starts and terminates.

Streamline Payments

COBRA enrollees send all payments to BerniePortal COBRA Services. BerniePortal COBRA Services will process a COBRA Remittance Report and send payment to the client. If payment is not postmarked by the deadline, a term request will be submitted to carriers.

PRICE LIST

As with most purchase decisions, cost is a large consideration employers must evaluate before purchasing an HRIS.

FEATURE	BASE PER MONTH	PER USER PER MONTH
Applicant Tracking	$15	$5
Onboarding	Ask your broker for pricing	
Benefits	Ask your broker for pricing	
PTO Tracking	$15	$5
Time & Attendance	$15	$5
Performance Management	$15	$5
Compliance	$15	$5
1095-C	Ask your broker for pricing	

Employers are only charged for the employees using the given feature. Base Cap of $40/month.
For example, purchasing 3 features would be a base of $40/month.

HOW DO I GET STARTED?

Interested in BerniePortal, but not sure where to start?

Check out our Virtual Product Tour! In this demo you can expect:

✅ A high-level overview of BerniePortal's end-to-end features illustrating how the system helps employers manage the full employee lifecycle online.

✅ Insight into how BerniePortal saves time, increases compliance, and simplifies HR administration.

✅ 5-minute product demonstration, complete with a minute by minute guide if you want to dive into one feature specifically.

REGISTER FOR DEMO

The Virtual Tour is available on demand - watch it when, where, and how you want to.

Still have questions?

RESOURCE LIBRARY   **KNOWLEDGE BASE**   **BERNIEPORTAL BLOG**

BerniePortal
www.BerniePortal.com