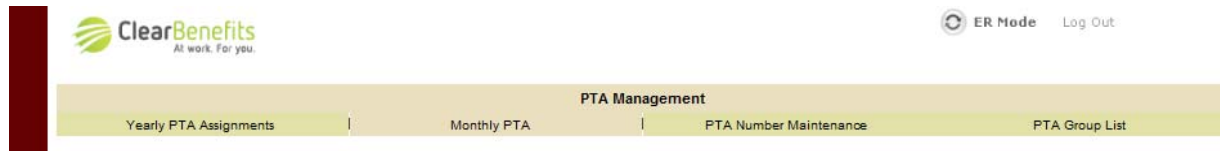## Navigating the ClearBenefits System

There are four tabs at the top of the PTA Management screen when you login. The first and the last tabs can be ignored. You will be using the Monthly PTA and the PTA Number Maintenance tabs.



### Monthly PTA screen

- From the main PTA Management screen ▶ Monthly PTA
- Click on Filter (this will bring up another pop-up screen)
- You will see all available PTAs for selection in the drop-down menus
- Each month, review that the PTAs selected for each Postdoc are:
  - Correct: Task numbers may change from year to year
  - Up-to-date: Eligibility for the Benefits Pool may change
  - Filled-in: For new postdocs who have just signed up or in cases that a PTA has expired
- If the PTA you need to select is not listed, you will need to make an adjustment on the PTA Number Maintenance screen (instructions below)
- Press the Save button on the left hand side of the screen

### PTA Number Maintenance screen

- From the main PTA Management screen ▶ PTA Number Maintenance
- To add a new PTA
  - Before adding a new PTA, check that it is not already on the list with an expired End Date
  - Click "Add New PTA"
  - Enter the PTA Name, Project, Task, and Award, Begin and End dates
    - NOTE: Do not use any characters in the PTA Name (i.e. . , " ' / )
  - Click "Finish"
  - The PTA will now be available for selection from the drop-down menu on the Monthly PTA Maintenance Screen
- To edit an existing PTA (i.e. fix an End Date)
  - Click on the PTA you want to edit
  - Update the existing end date to some time in the future
  - Click "Finish"
- Click the Save button on the lower right hand side of the PTA table