



BERNIE PORTAL

A Bernard Health Production

About BerniePortal

What Is BerniePortal?

BerniePortal is an easy-to-use, all-in-one [human resources information system \(HRIS\)](#) that automates common administrative HR tasks like [benefits administration](#), [applicant tracking](#), [compliance](#), [payroll](#) and more.

A robust HRIS like BerniePortal means you can track and manage HR functions using a streamlined digital hub. It also means that your employees can access self-service features with a single login. Gone are the days where you spend hours taking on manual tasks, fixing clerical errors, adjusting filing woes, and searching for missing information. It's simple and intuitive, but don't be fooled—BerniePortal is a powerful tool for HR that makes HR-related tasks easier for all employees.

PCMAG.COM

“

A good human resources (HR) software solution should make HR professionals' lives easier when it comes to hiring, administering benefits, firing, and other common HR tasks. Some HR software solutions have more features than others, but they all essentially aim to improve HR professionals' productivity. In this sense, BerniePortal is a solid choice for HR software. The software is priced by over 200 independent brokers, so you'll need to call the company for exact pricing. BerniePortal lets you keep track of applicants in the system, streamline the onboarding process and more.

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PC Magazine | Oct 2018

PC Magazine Editor's Rating:

“Excellent”

2008

Year founded

175,000

Active users in all 50 states

200+

Broker partners nationwide

About Alex Tolbert, BerniePortal Founder



Alex Tolbert

BerniePortal Founder and CEO

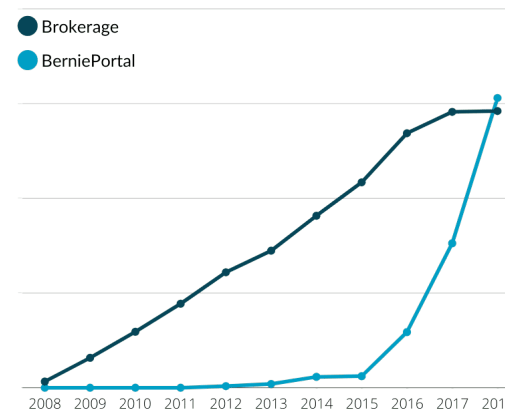
Originally from Indiana, Alex Tolbert is the founder and CEO of BerniePortal, the all-in-one HRIS for small and mid-sized businesses, and Bernard Health, a Nashville-based benefits brokerage. Tolbert received his BS and BA in Finance and International Studies from the Wharton School at the University of Pennsylvania, where he was a member of the Huntsman Program in International Studies and Business, and obtained his JD and MBA from Vanderbilt University Law School and the Vanderbilt University Owen School of Management. He is an industry-recognized expert on HR technology, the benefits industry, small business operations and software development.

The Story of BerniePortal

- Brothers Alex and Brian Tolbert went into business together in Nashville, Tennessee, and they wanted to build something great. The business was a health insurance brokerage. They were going to set the world on fire.
- Two years later, it was April 2008. The world was far from on fire. Turns out cold-calling employers about health insurance is a lot harder than they thought it would be.
- After those two long years of cold-calling, Alex and Brian were still in their three-bedroom apartment, still with a “World Headquarters” sign hanging in the third bedroom. Only the sign didn’t seem as charming to them as when they first hung it up.
- Being a broker was more difficult than the brothers originally anticipated because their prospective customers had it hard. Being a small employer isn’t easy, and being the HR person at a small employer is downright tough.
- Alex and Brian observed that sales, marketing, and customer service often gave employees great software tools to get things done—even at small employers. Too often, though, HR at those small employers did not. It struck them—why not? Why shouldn’t HR also be able to provide great software to employees?
- They had a vision for HR with less pain—and definitely less paperwork—so they built BerniePortal, the all-in-one HR platform that builds better employee experiences.



Alex and Brian with their Dad, Bill



- Before BerniePortal, Alex and Brian handled HR the old-fashioned way. They were a small business based in Nashville, trying to help local employers and individuals figure out healthcare, but they were spending just as much time on administrative work as they did helping clients.
- BerniePortal connects all the parts of the HR puzzle in a comprehensive, all-in-one HR tool, allowing employers to spend less time on administration.
- While the ten year milestone in 2018 was a great achievement, there is still a lot for BerniePortal to accomplish. Since then, we've continued to work hard to celebrate and support the HR pros who keep small businesses going and growing.
- In 2020, we continued to increase our investment in supporting HR effectiveness with the launch of our very own YouTube series, HR Party of One.
- In 2021, we hosted our HR clients and the benefits brokers who support them at our annual users conference, Weekdays with Bernie, with both in-person and virtual options to network and learn best practices for helping to keep their organizations going and growing!
- Due to popular demand, BerniePortal launched our Payroll feature, which works seamlessly with our Benefits Administration, Time and Attendance, and PTO features to provide employers with a well-rounded, all-in-one HRIS.



BerniePortal Features



Applicant Tracking

Find the best candidates faster by bringing your recruitment online



Onboarding

First days should be about getting to work, not paperwork



Benefits Administration

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



Time & Attendance

Time management without the time commitment



PTO Tracking

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



Performance

Evaluate and communicate workplace performance



Compliance

Streamline communication without opening your inbox



1094-C / 1095-C

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



Payroll

Time is money:
Pay employees quickly and correctly

BerniePortal Quick Facts

- 1 BerniePortal is the only HR system that takes employees through the entire employee lifecycle— from applicant tracking and onboarding to benefits administration and payroll.
- 2 BerniePortal provides the most robust benefits administration functionality in the market, allowing employers to offer better, more competitive benefits and streamline employee enrollment.
- 3 Several leading carriers, including Guardian, Unum and Allstate, use BerniePortal as their eligibility database, meaning no integration is necessary—employers can generate accurate bills in real-time via BernieBill.
- 4 BerniePortal's Applicant Tracking feature integrates with Indeed, allowing hiring managers to attract the site's 200 million monthly job seekers, and their applicants are entered directly into BerniePortal.
- 5 BerniePortal has a robust network of integrated partners, including insurance carriers, and other service providers.



2021

Best SaaS for Human Resources for BerniePortal



2021

Best SaaS for Applicant Tracking for BerniePortal



2021

Crozdesk's Quality Choice Badge



2019

Customer Service Department of the Year



2019

Best SaaS Product for Small Business / SMBs

BerniePortal Payroll

BerniePortal is launched our very own Payroll feature! BerniePortal's Payroll solution is another tool in your team's belt to streamline everyday organizational functions and processes in one digital hub. Working in harmony with BerniePortal's [PTO](#), [Benefits Administration](#), and [Time & Attendance](#) features, our Payroll feature helps you ditch the spreadsheets, save time, and improve accuracy on payday.

HOME

BERNIEBILL

EMPLOYEES

REPORTS

BENEFITS

ONBOARDING

1094C/1095C

PAYROLL

OFFBOARDING

...

Run Payroll

History

Subgroups

Settings

May 25, 2022 - June 07, 2022

Pay date: June 08, 2022

☐ Skip benefit deductions for this pay period

<input checked="" type="checkbox"/>	NAME	COMPENSATION	HRS	OT RATE	OT HRS	PTO	EARNINGS	DEDUCTIONS	BENEFIT DEDUCTIONS	GROSS
<input checked="" type="checkbox"/>	Jim Sellers	\$1,923.08 per period	---	---	---	---	\$0.00	\$30.00	\$290.00	\$1,923.08
<input checked="" type="checkbox"/>	Greg Chapter	\$ 21 per hour	70.00	\$ 31.50	0.00	8.00	\$40.00	\$0.00	\$312.00	\$1,678.00
<input checked="" type="checkbox"/>	Anita Page	\$ 21.5 per hour	80.00	\$ 32.25	8.00	0.00	\$70.00	\$23.00	\$302.00	\$2,048.00
<input checked="" type="checkbox"/>	Luke Encyclopedia	\$ 2,500 per period	---	---	---	---	\$0.00	\$50.00	\$294.50	\$2,500.00
<input checked="" type="checkbox"/>	Grant Johnson	\$ 18 per hour	79.00	\$ 27.00	0.00	1.00	\$0.00	\$0.00	\$257.50	\$1,440.00
<input checked="" type="checkbox"/>	Felix Novel	\$1,307.69 per period	---	---	---	---	\$200.00	\$50.00	\$49.50	\$1,507.69
<input checked="" type="checkbox"/>	Barry Books Jr	\$2,153.85 per period	---	---	---	---	\$200.00	\$0.00	\$419.50	\$2,353.85
<input checked="" type="checkbox"/>	Damian Appendix	\$ 2,400 per period	---	---	---	---	\$0.00	\$235.00	\$0.00	\$2,400.00

START OVER

SAVE & REVIEW

Additional BerniePortal Resources



- **HR Party of One**

In 2020, we continued to increase our investment in supporting HR effectiveness with the launch of our BerniePortal's popular podcast and YouTube series, [HR Party of One](#), hosted by Elisabeth Wallace. HR Party of One focuses on understanding and demystifying the HR issues facing small to midsize employers while tackling topics like benefits, compliance, onboarding, offboarding, payroll, and more!



- **BernieU**

Brought to you by BerniePortal, BernieU offers convenient, compelling, and comprehensive online HR courses for free that are suitable for HR veterans as well as newbies.



- **BBS**

[BerniePortal Broker Services](#) provides marketing automation software to drive agency growth. Our suite of marketing tools include pre-drafted email campaigns, simplified reporting, and more—so that you can make the most of your client relationships.

Leadership Bios



ALEX TOLBERT is the founder and CEO of BernieHealth. Today, his work primarily supports the growth and development of BerniePortal. Alex received his B.S. and B.A. in Finance and International Studies from the Wharton School at the University of Pennsylvania, where he was a member of the Huntsman Program in International Studies and Business, and obtained his J.D. and M.B.A. from Vanderbilt University Law School and the Vanderbilt University Owen School of Management. Alex is an industry-recognized expert on HR technology, the benefits industry, small business operations and software development.



CHARLIE MCMACKIN is one of the leaders of the development team at BerniePortal, working to ensure that the platform's security and performance are top-notch and that the company builds what customers demand as efficiently and effectively as possible. He has been with the company since 2016.



BEN WATSON leads product and development efforts at BerniePortal. Outside of work, Ben loves to stay active. He is involved with youth group development and enjoys tennis, volleyball, kickboxing, and rock climbing.



STEVEN CRITCHFIELD is one of the leaders of the development team at BerniePortal, working to provide first-rate security and performance on a daily basis. His career in software programming has taken him from medical transcription to tracking continuing education and now to HR. In his spare time, he enjoys building and maintaining both cars and motorcycles, programming for fun, and spending time with his family.



LINDSEY VAN CLEAVE leads the client success team at BerniePortal. Her team provides trusting operational expertise that helps both our customers and partners succeed with our software. Outside of BerniePortal, she loves to spend her time volunteering with Best Buddies as well as working with the children's ministry at West End United Methodist Church. When she is not out on the lake with her dog, she loves to cook, workout, and read.



SARAH WEINSTEIN leads the sales and marketing teams, which are responsible for creating awareness and demand for BerniePortal's products and services. Outside of BerniePortal, she enjoys traveling and spending time outside with her dog, Skip.



BRIAN TOLBERT leads the Bernard Benefits day-to-day operations. Since joining Bernard in 2007, he's spent his entire time helping employers re-evaluate how they finance employee benefits while also helping them move HR processes online with BerniePortal. Outside of Bernard, he serves on the Nashville Habitat for Humanity Chapter's Advisory Council and enjoys spending time with his wife and



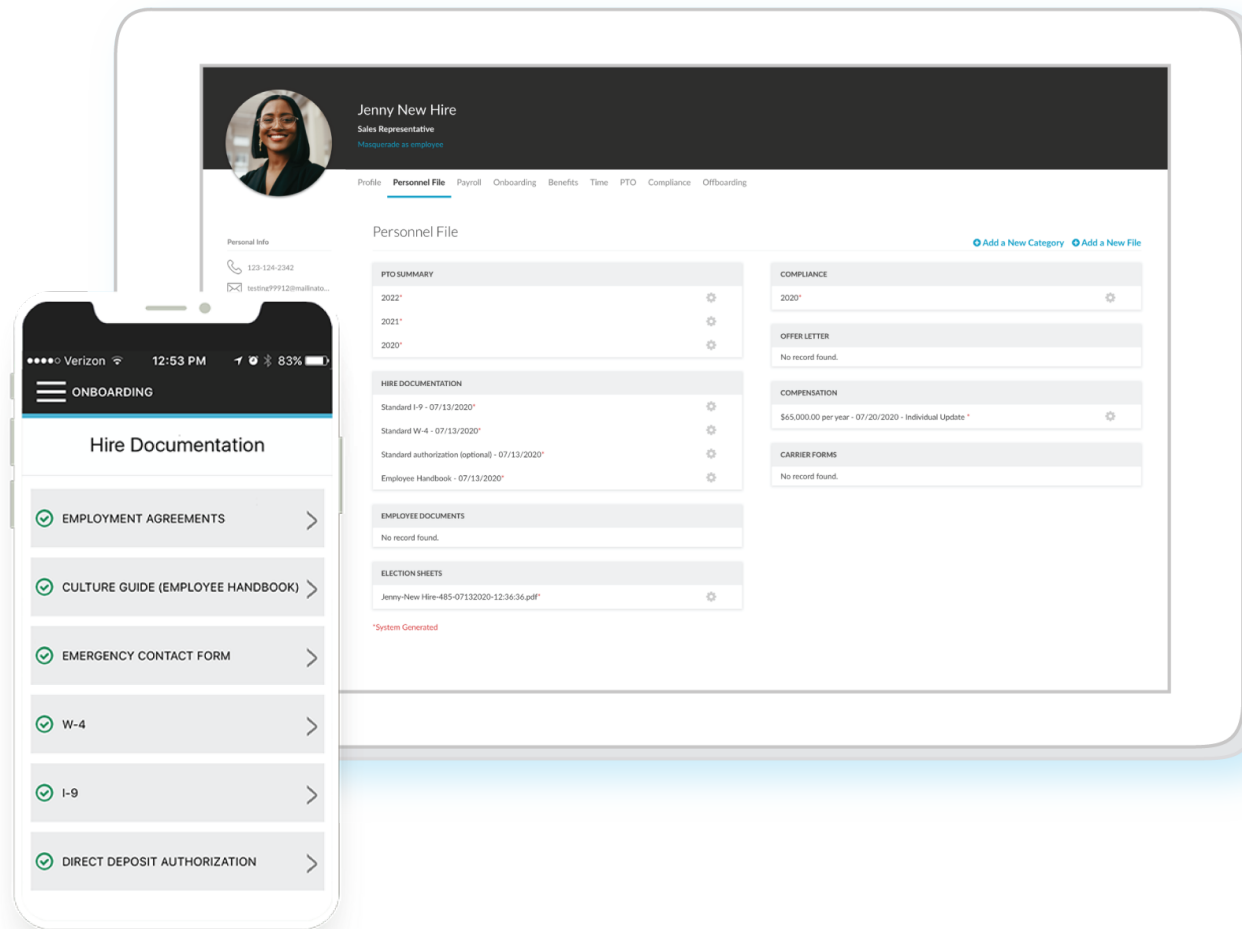
TRENNIE WILLIAMS is one of the leaders of the client success team at BerniePortal, which provides our customers with expert solutions for their software needs. Trennie grew up as the oldest of 5 children. He is an Eagle Scout and loves the Tennessee Vols. He volunteers with the Middle Tennessee Boxer Rescue and is a board member with Appalachia: A Southeastern Wind Symphony. In his spare time, he enjoys co-hosting a sports podcast.



ANDREW LA HAIE is one of the leaders of the client success team at BerniePortal, which provides customers with expert solutions for their software needs. He is a native Nashville resident and a parent to four young, energetic (and sometimes patience-testing) children. He enjoys doing anything outdoors when it's warm outside, especially playing golf with friends.



MILLIE HOFFMAN Millie is one of the leaders of the product team at BerniePortal. Her experience in health insurance has helped BerniePortal grow into the world-class HRIS Software it is today. In her spare time, she enjoys playing tennis and watching the Kansas City Chiefs, as well as hiking and boating with her husband and their dog.



It's our mission to help you be a trusted, full-service advisor to your small to midsize employer clients. See how BerniePortal's all-in-one platform can grow your agency and provide your clients with strategic benefits and HR support.

BerniePortal's benefits administration platform and HR software makes onboarding, payroll, carrier integrations, and 1095-C reporting easier. [Learn more here.](#)

[Click here](#) for access to downloadable BerniePortal product images and brand assets.