InsurePay®

Premier Payroll Guide

Policyholder Experience

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www.insurepay.com | support@insurepay.com

The Beacon Mutual Insurance Co.

Premier Payroll Overview

InsurePay® Pay-as-you-go Premier Payroll Connections enables policyholders to access many new payroll providers for automated payroll data reporting.

- The policyholder must provide login credentials to their payroll company site.
- Once the policyholder completes the premier payroll registration, payroll will pass from their payroll company to their carrier's pay-as-you-go system.
- This guide documents the experience of the policyholder.
- The generic product brand of InsurePay is used in the document as an example carrier name. When the feature is live for a carrier, policyholders will see the specific brand of the carrier.

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Premier Payroll Connections

- The following is a list of the new Premier Payroll Providers that are now available:

  - Gusto
  - Insperity
  - Justworks
  - Paychex Flex
  - Paycom
  - QuickBooks Payroll
  - Run Powered by ADP
  - Sequoia One
  - Square Payroll
  - TriNet
  - UltiPro (UKG Pro)
  - Wave
  - Zenefits

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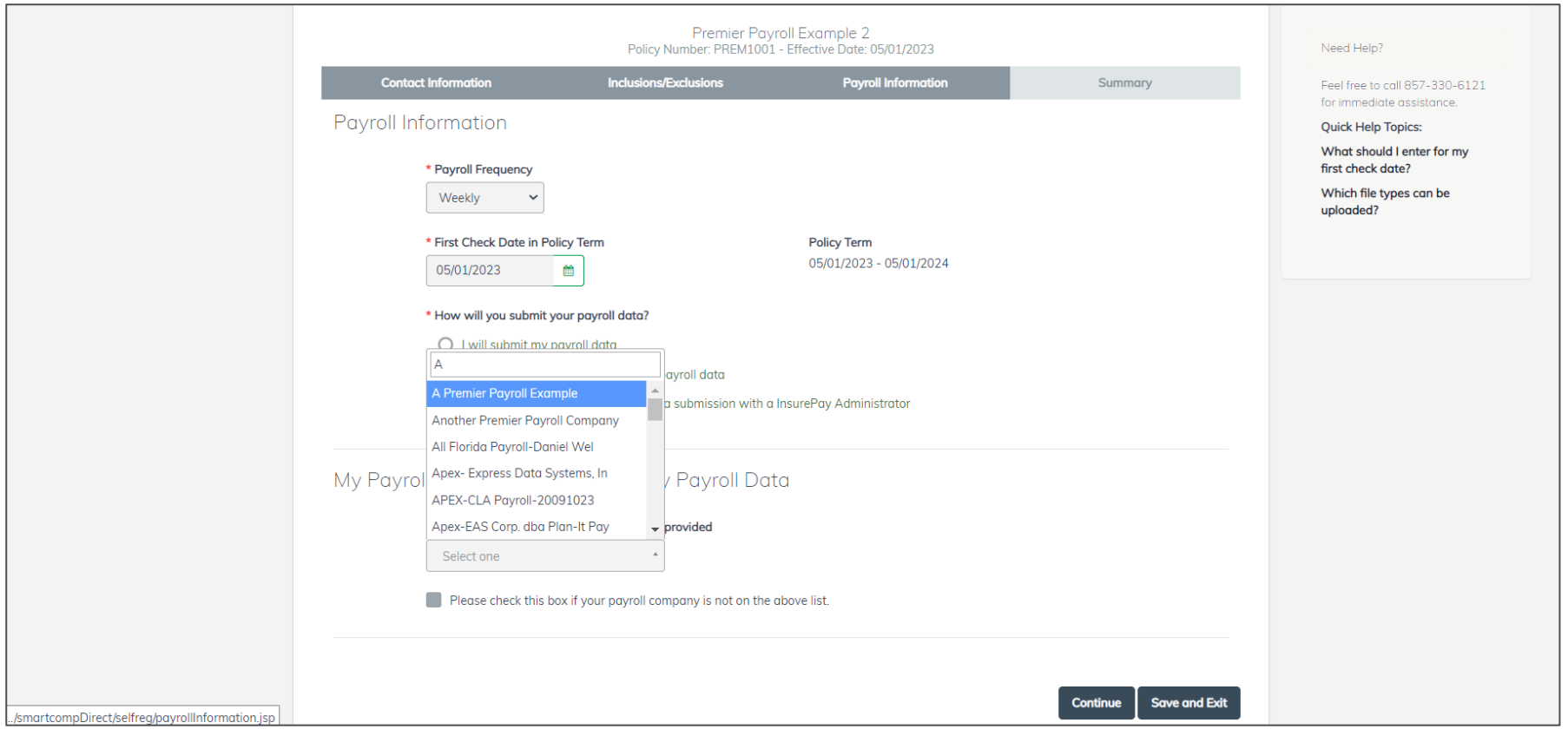
Self Registration – Payroll Information

Policyholders associated with carriers that have self-registration will choose their premier payroll company through the self-registration process. (Other carriers have the policyholder select the company in their policy admin system or the admin completes the setup while In Progress.)



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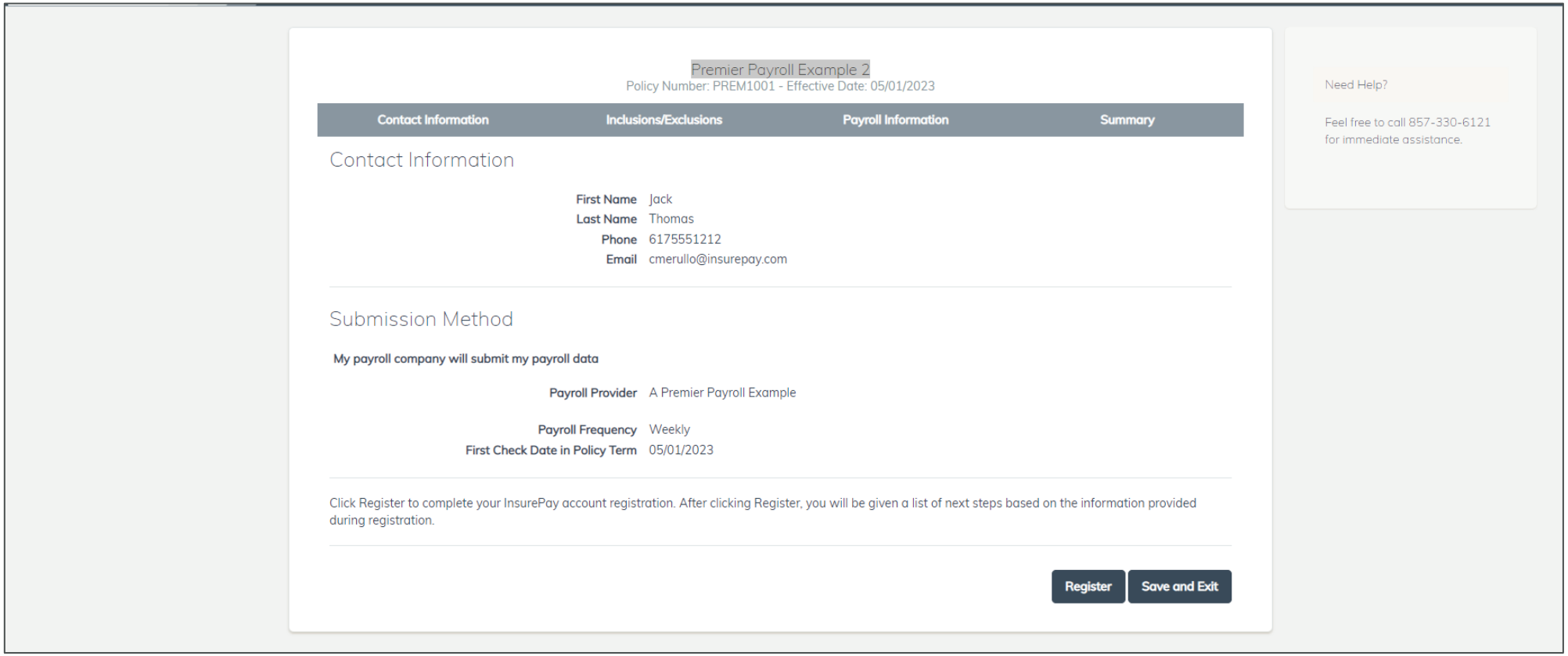
Self-Registration - Summary

The Summary page of self-registration shows the payroll provider selected by the user.



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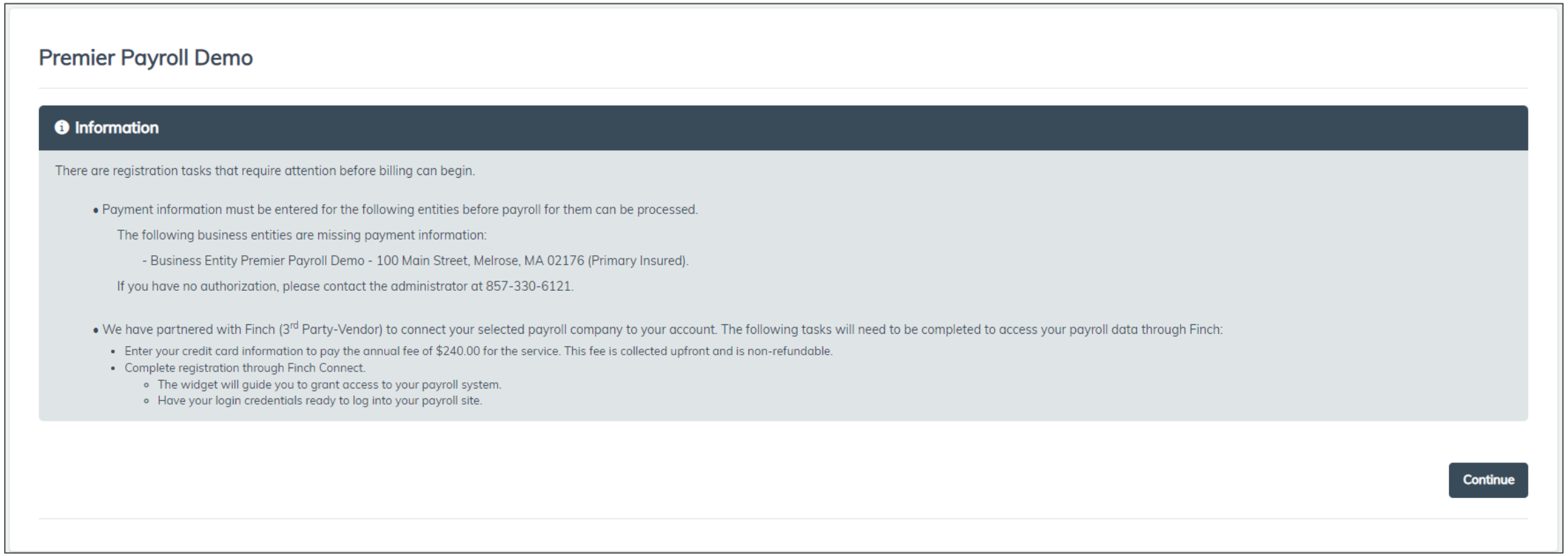
Premier Payroll Registration Tasks

For policyholders that are new to pay-as-you-go, the policyholder will complete a few tasks including adding their payment information to pay their worker's comp premium, entering their credit card information for the premier payroll fee, and providing their payroll company credentials to connect their policy.



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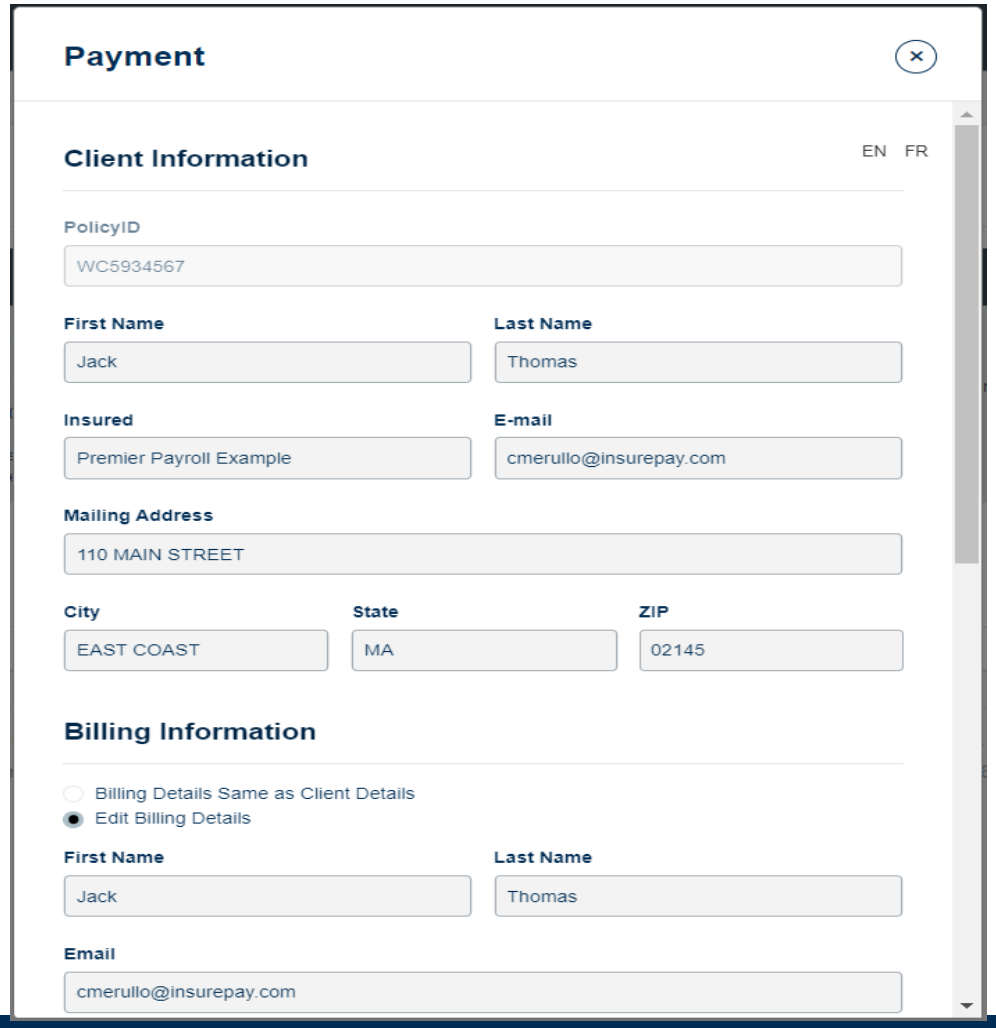
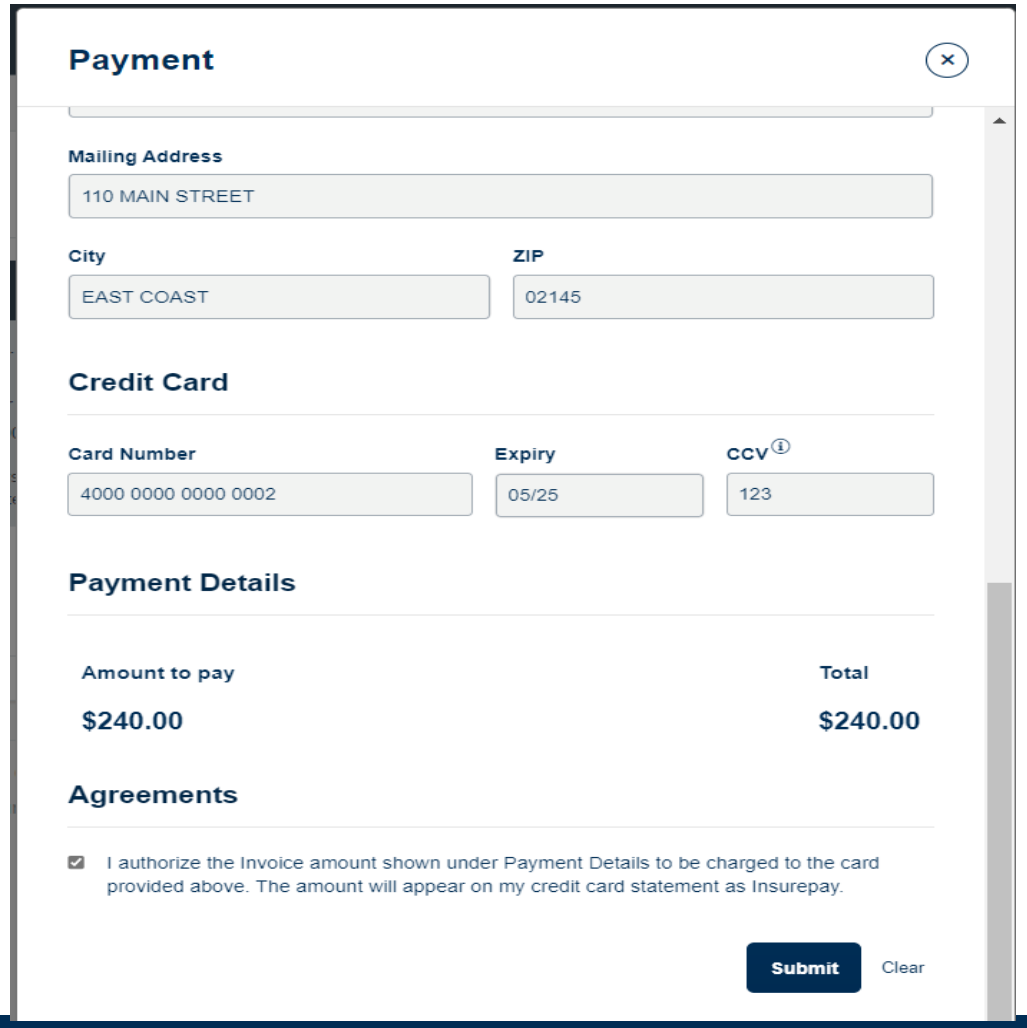
Enter Credit Card Information

After the user enters their payment information to pay their worker's comp premium, they will be prompted to enter their credit card information to pay the upfront annual fee for the premier payroll service.





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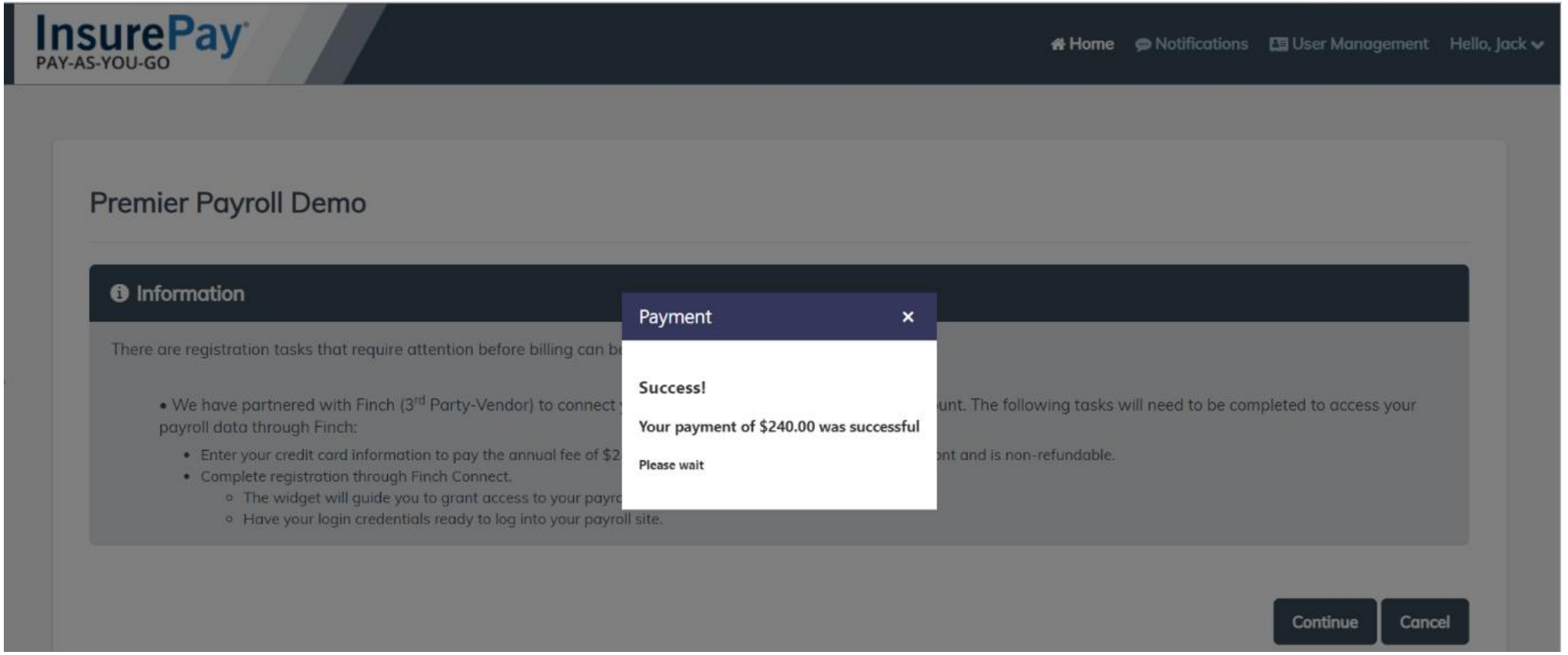
Credit Card Payment Success Message

If the policyholder enters their credit card information successfully, they will receive a success message.



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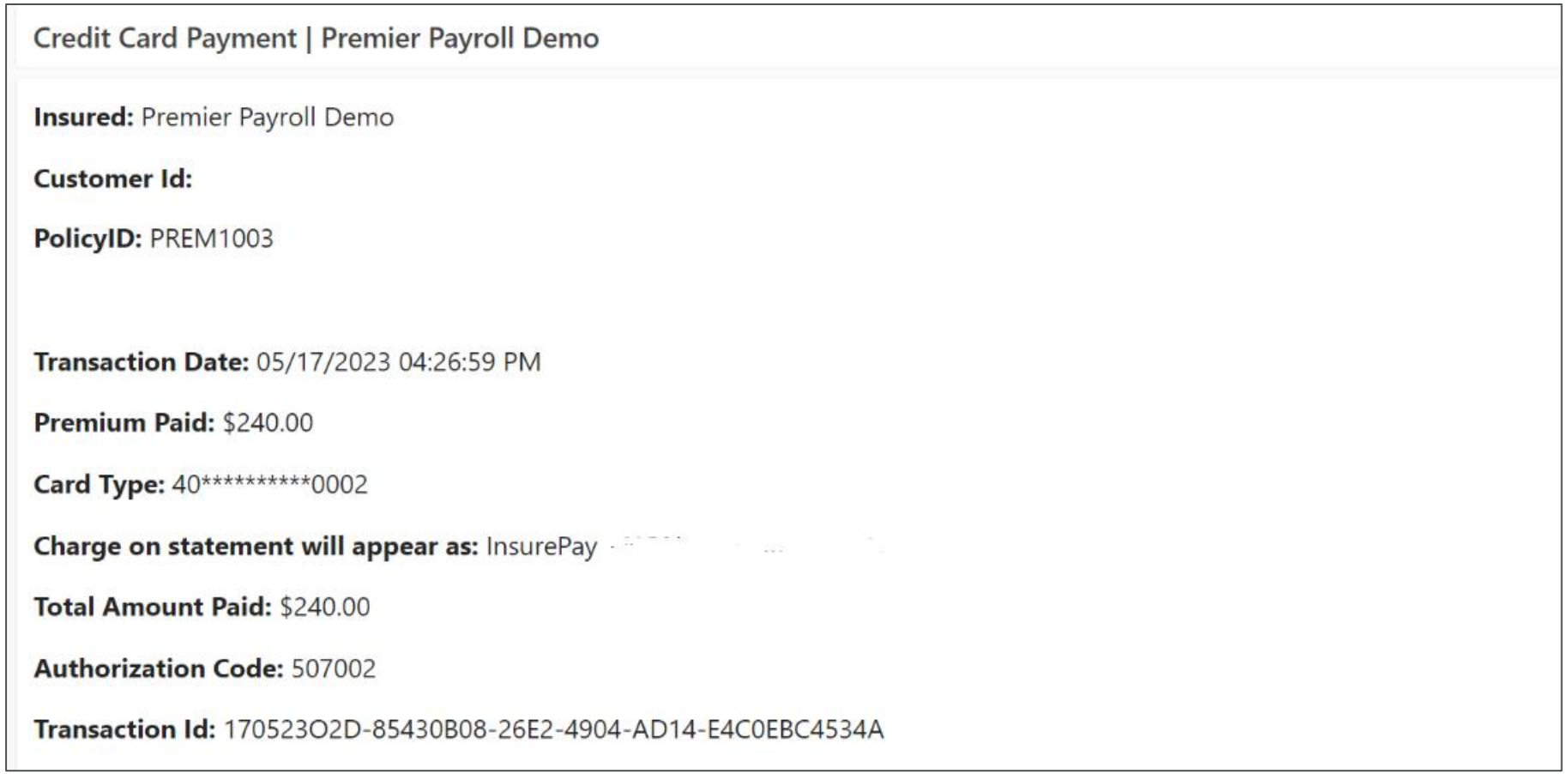
Credit Card Payment Email

In addition to a success message, the person will receive a confirmation of the credit card payment via email.



Credit Card Payment | Premier Payroll Demo

Insured: Premier Payroll Demo

Customer Id:

PolicyID: PREM1003

Transaction Date: 05/17/2023 04:26:59 PM

Premium Paid: $240.00

Card Type: 40**********0002

Charge on statement will appear as: InsurePay

Total Amount Paid: $240.00

Authorization Code: 507002

Transaction Id: 170523O2D-85430B08-26E2-4904-AD14-E4C0EBC4534A

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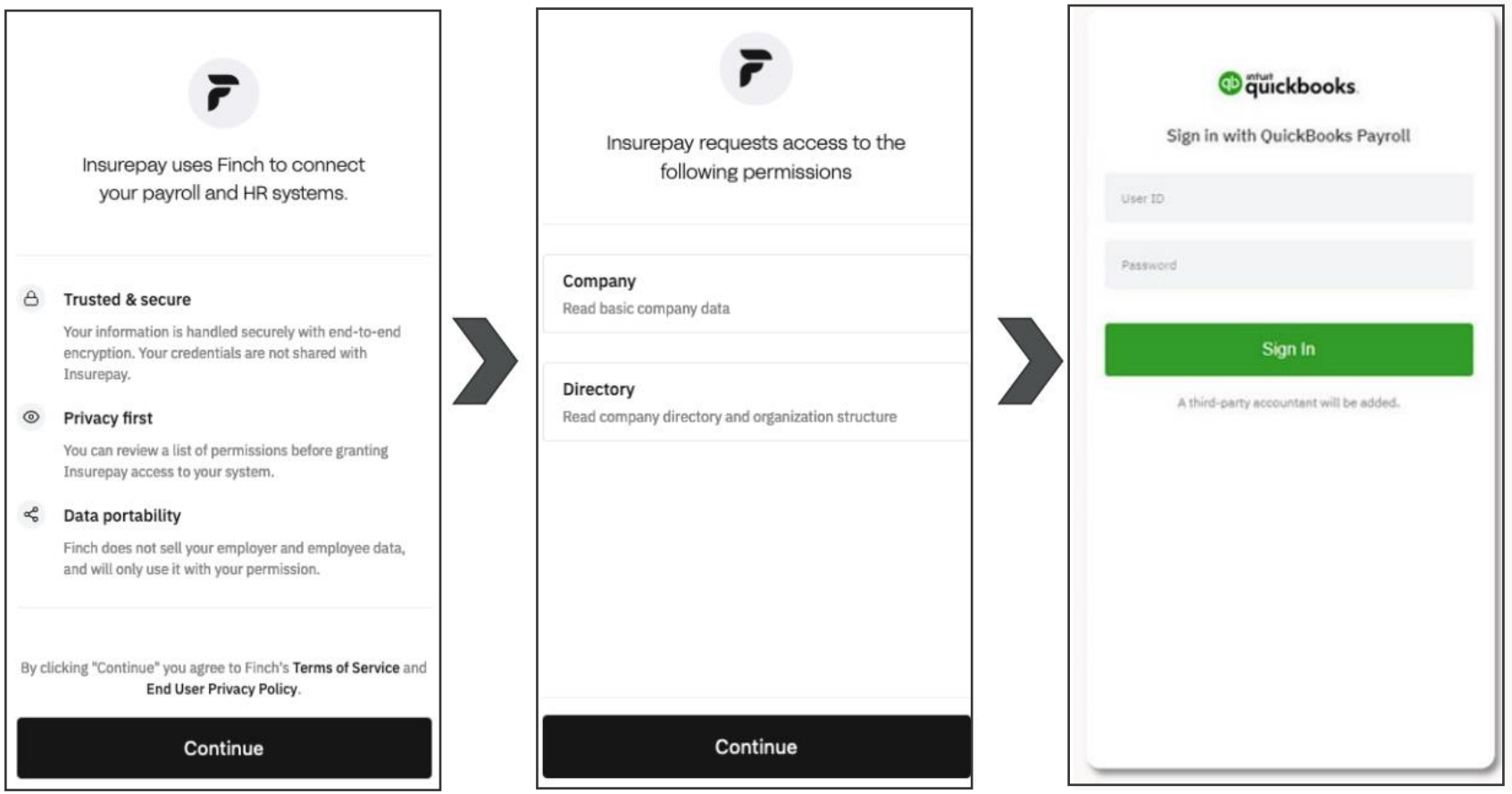
Premier Payroll Registration

After the credit card information has been entered, the user will finish the payroll company setup process. The user will continue to the pages below and on the last page enter their username and password to log into their payroll company site.



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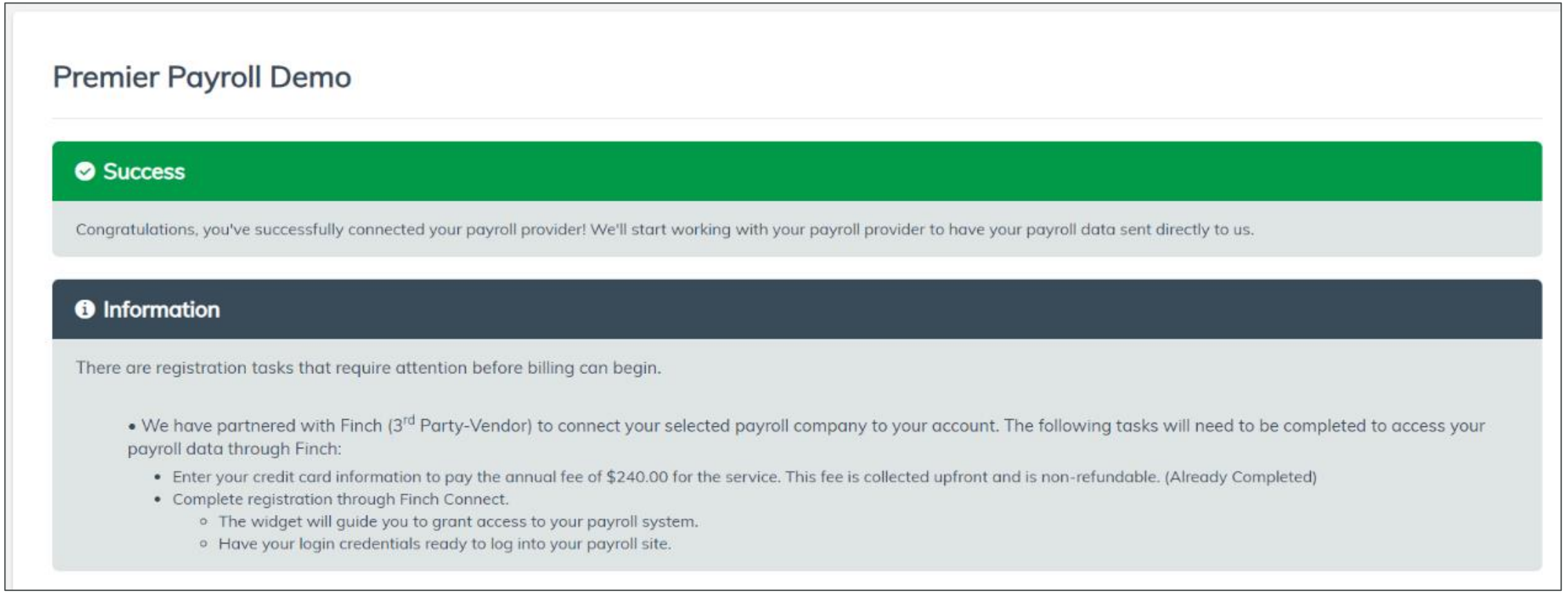
Premier Payroll Company Successfully Connected

Once registration is complete the user will receive a message that their payroll provider has been connected to their policy. This message will appear for several second with the tasks and then the page will be refreshed.



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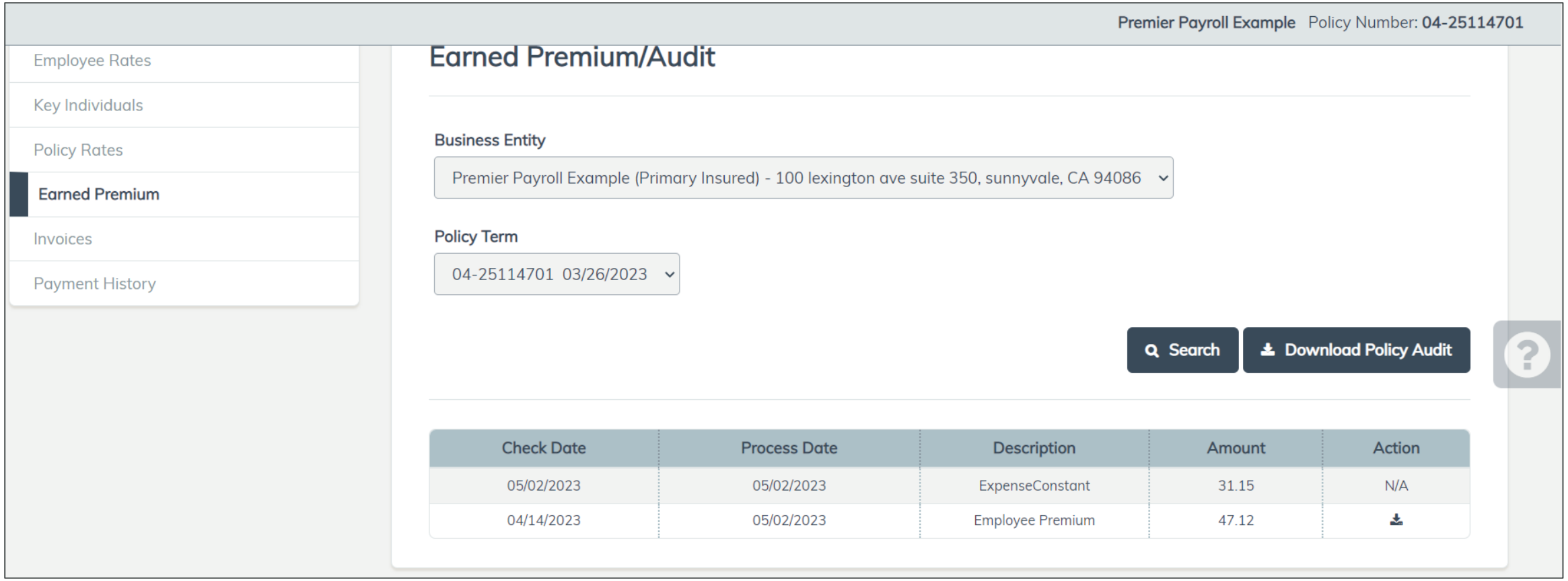
Payroll from the Payroll Company

Now that the policyholder has connected their payroll company to their policy, payroll will flow seamlessly from the payroll company to the policy.



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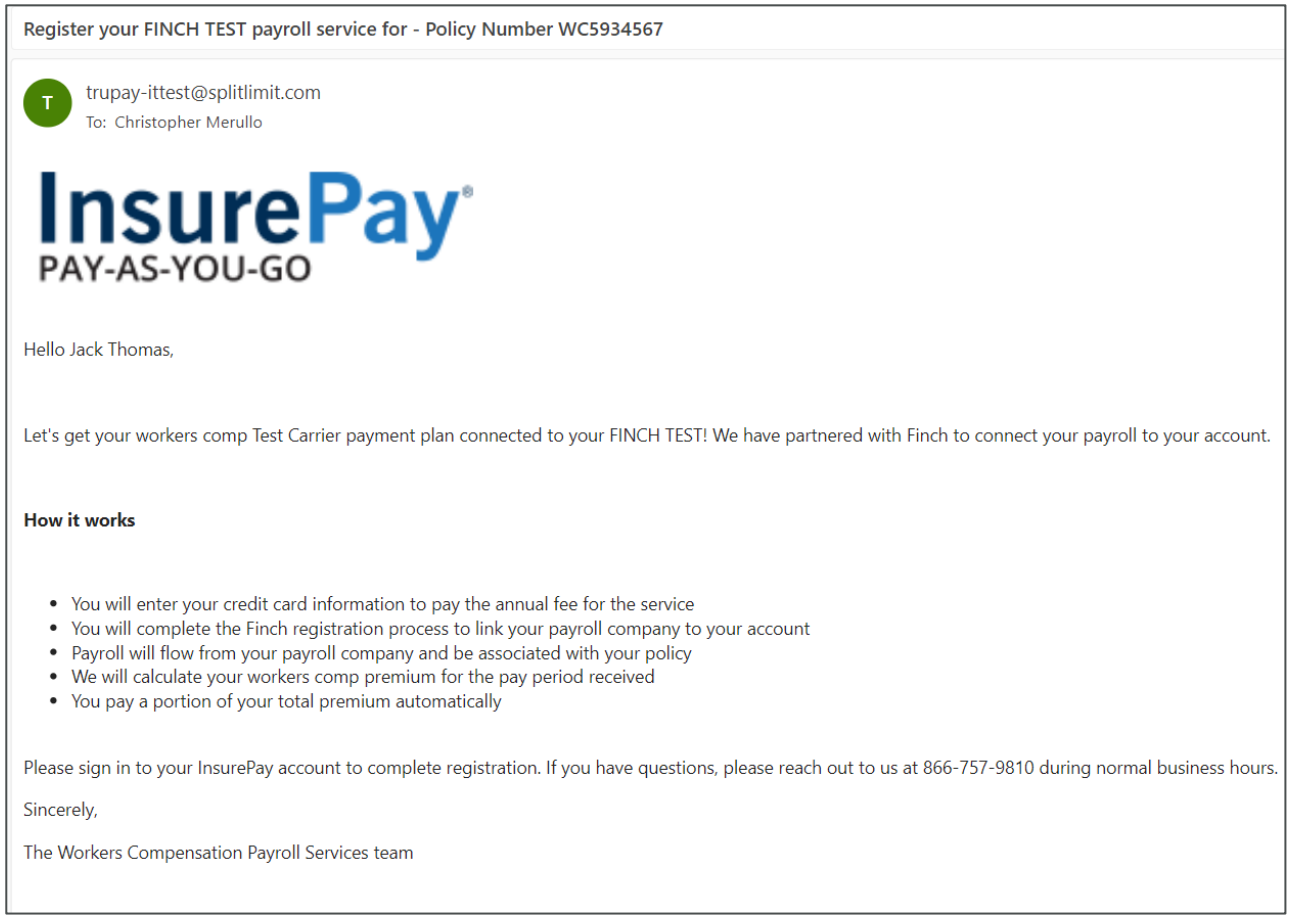
Switching From Self-Reporting to Premier Payroll

For policyholders that want to switch to their premier payroll company, they will reach out to the carrier administrator to switch their account. The policyholder will receive an email to explain the process and instruct them to log into their account. The carrier admin may send another email if not completed in a timely manner.



Register your FINCH TEST payroll service for - Policy Number WC5934567

T trupay-ittest@splitlimit.com
To: Christopher Merullo

InsurePay®
PAY-AS-YOU-GO

Hello Jack Thomas,

Let's get your workers comp Test Carrier payment plan connected to your FINCH TEST! We have partnered with Finch to connect your payroll to your account.

How it works

- You will enter your credit card information to pay the annual fee for the service
- You will complete the Finch registration process to link your payroll company to your account
- Payroll will flow from your payroll company and be associated with your policy
- We will calculate your workers comp premium for the pay period received
- You pay a portion of your total premium automatically

Please sign in to your InsurePay account to complete registration. If you have questions, please reach out to us at 866-757-9810 during normal business hours.

Sincerely,

The Workers Compensation Payroll Services team

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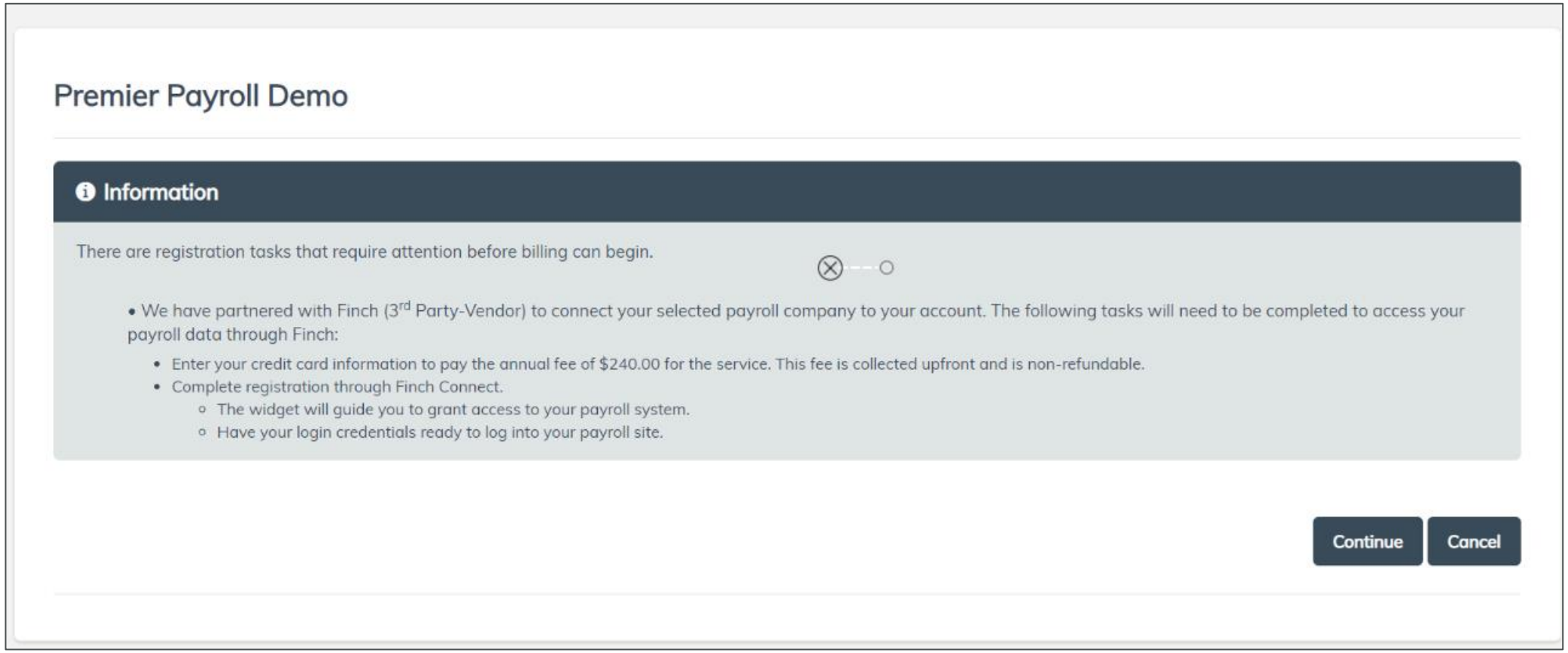
Premier Payroll Registration Tasks

Since the policyholder has already been reporting payroll, there is no task to enter the payment information for the worker's comp premium. The user will click Continue to start the premier payroll registration process.



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Exception Handling

There are a few exceptions that should be noted if the policyholder experiences issues.

- User enters invalid credit card information
- User is unable to register their payroll company
- User decides to cancel out of the registration process
- Interruption in connection to payroll company

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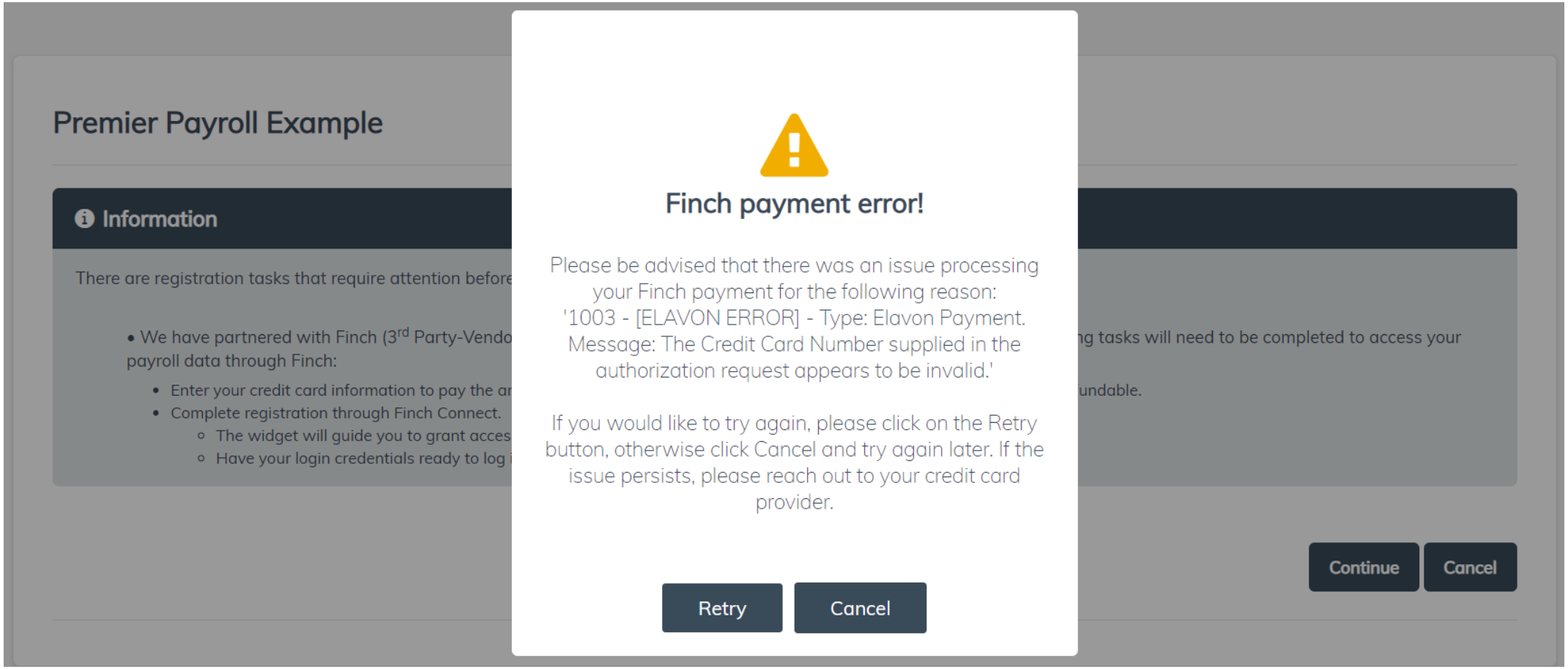
Invalid Credit Card Information

At the time of the credit card payment, if the policyholder puts invalid information for the credit card, they will be warned that there was an error. The user is prompted to retry to enter their information again.



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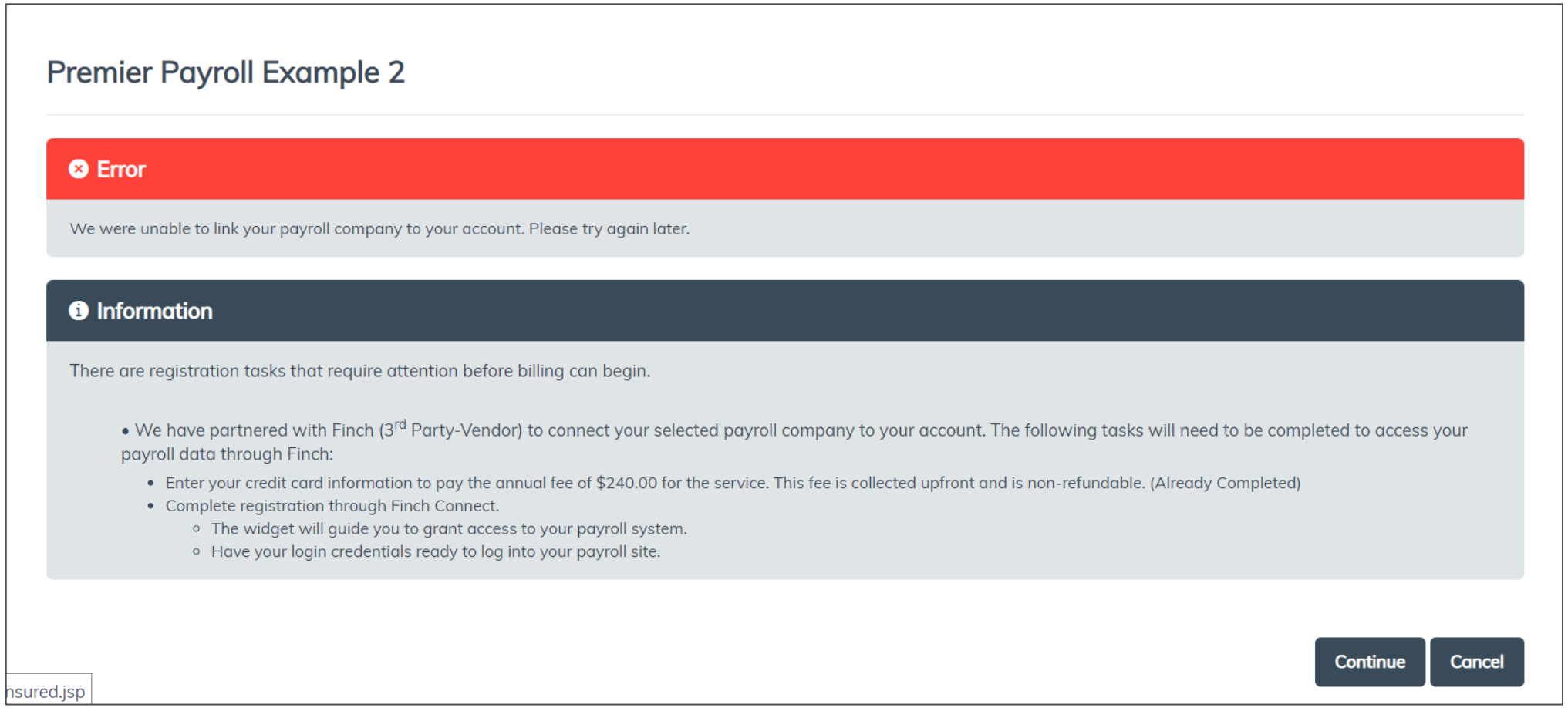
Unable to Complete Registration

If the policyholder has issues with registering their payroll company, they will receive a message to try again later.



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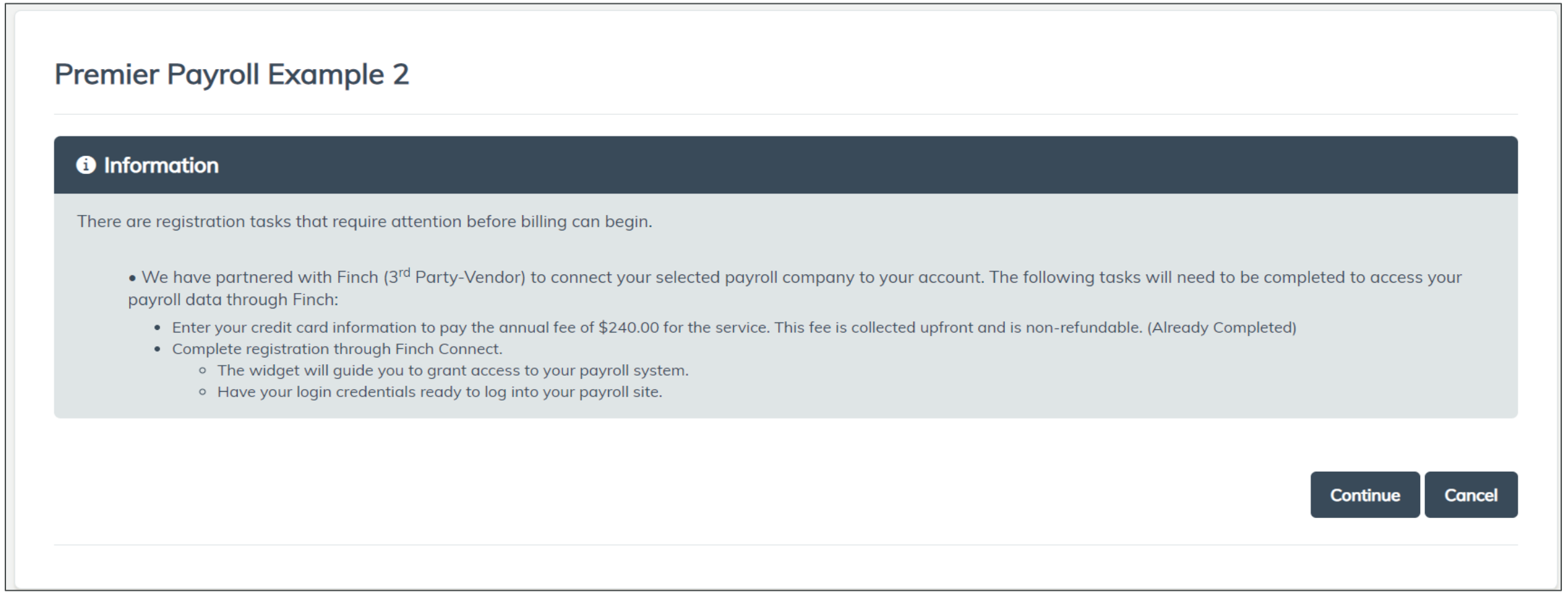
Returning to Register After Already Paying

If the policyholder had issues with registering their payroll company and return to complete registration, they will see that the task about their credit card is already complete. When they click Continue, they will be brought into the payroll company registration process.



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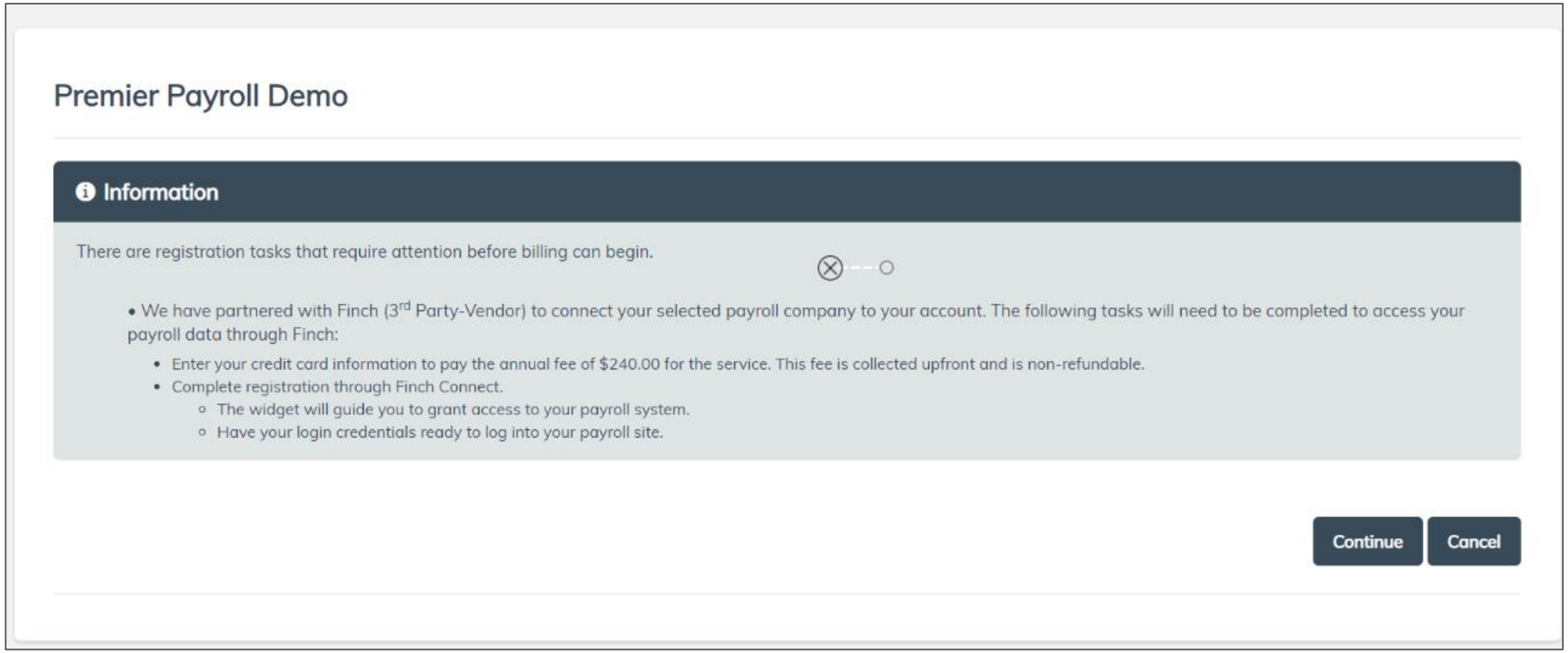
Canceling out of the Premier Payroll Process

If a policyholder has not yet completed the tasks to connect their payroll company to their policy, they do have the option to cancel.



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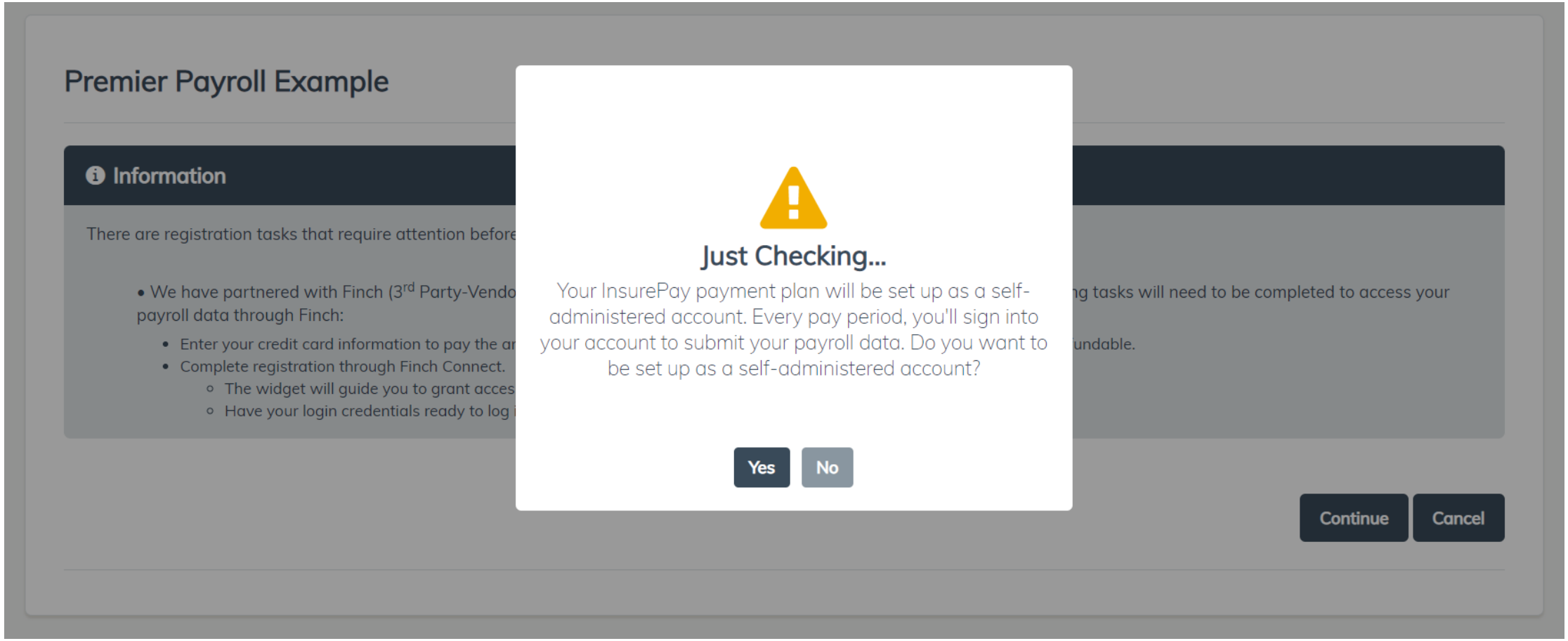
Warning before Canceling

If the policyholder chooses to cancel the premier payroll registration, a warning message will display to ask if they are sure if they want to proceed. If they choose No, they will return to the registration tasks.



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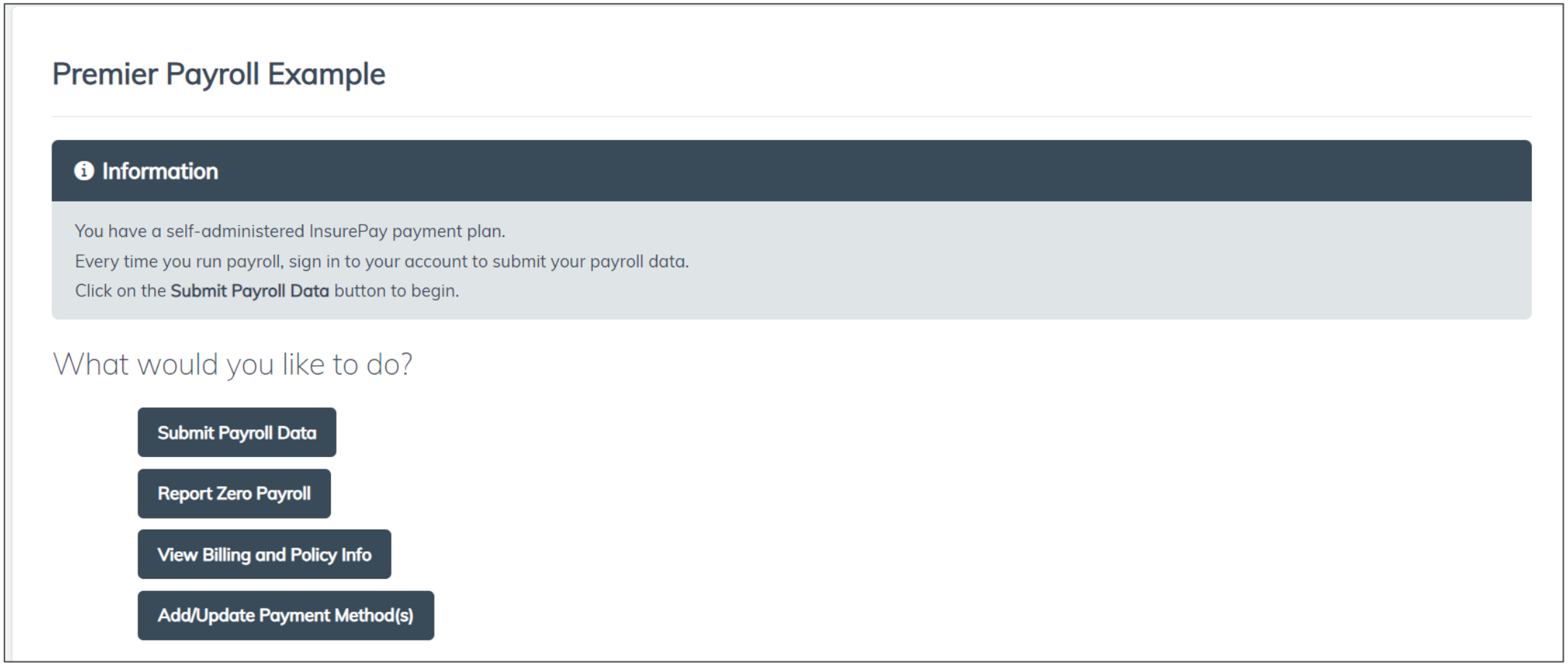
Cancel to Self-administered

If the policyholder choose Yes to Cancel, they will receive the following instructions



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Interruption in Connection to Payroll Company

If there is an interruption in the connection with the payroll company, the policyholder will be informed to re-register their account. The policyholder will not have to pay the fee again if it is within the annual fee window. The policyholder will sign in and complete the registration process again.

Subject: Re-Register your [payroll company name] payroll service for [policy number]

Carrier logo

Hello [What do we put here?]

Please be advised that the connection to your payroll company has been interrupted. Please sign in to your [Carrier] account to complete registration again. If you have questions, please reach out to us at [Phone number].

Sincerely
The [Carrier] team

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For more information about the Beacon Pay As You Go program and Premier Payroll Connections visit www.beaconmutual.com/PYG or call 401-825-COMP.

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