

How to "File & Pay" with the CTPL on Behalf of Clients

> Third Party Administrators & Tax Accountants



When & how do you need to File & Pay?

Third Party Administrators (TPAs) and Tax Accountants who are filing on behalf of their clients should submit all CT Paid Leave (CTPL) contributions for the quarter <u>no later</u> than the **last day of the month following quarter end**.

TPAs and Tax Accountants can submit the employee-paid contributions in multiple ways. Either by utilizing:

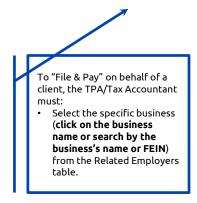
- 1. The secure online payment portal accessed from ctpaidleave.org (use this job aide for guidance), or by
- 2. Bulk format through a server to server secured transfer connection.

The CT Paid Leave Authority will not accept or process paper file submissions.

Accessing the Online Payment Portal for Your Client's Account

- 1. Sign into the ctpaidleave.org website.
- 2. Once signed in, click on your name in the top right-hand corner of the screen.
- 3. Select "My Account" from the drop-down menu. (You will come to your My Account page).
- 4. Select your TPA business account. If a **File + Pay** button appears to the right, do not select it—that will have you pay for your own account rather than your client's.
- 5. In the Related Employer's box, select the File + Pay button that appears next to the name of the client that you are paying on behalf of.

	Paid Leave	Search Q CTTax CTPL- Test
Home	The Process $ \!$	Us About Us Resources News Events CTPL Podcast
LANGUAGE SELECTOR: English Espa	ñol	
CT TPA Test Registration Number: 40-609 Return to My Account		Payment Announcement The deadline for quarter payments is one month after the quarter end, so please remit your payments promptly. We recognize that employers and TPAs are working to configure their systems to ensure that they are correctly filing and paying the required contributions. We are not assessing fines and penalties at this time.
Account Info Contacts Inquiries Private PI	n Payment Methods	After submitting your payment, refresh this page as it may take a few minutes to update and reflect your payment. Should you have any additional questions or concerns, please contact us.
Account Name CT TPA Test DBA	Phone Business Email	If you have submitted your payment but do not yet see it reflected, please do not be concerned. We are actively processing payments and recommend you check back periodically for updates to your account. Payments should be updated to your account within a week after submission. If there is an issue with processing your payment, we will
Federal EIN	Dusiness Entain Primary Business Activity	contact you.
40-6093094 CTPL Registration ID 000063115 Type	test	Related Employers
Other Business Type		Find A New Employer via FEIN Number Q. 45-4906404 Search
Business Information Opt In Employer	Employee Size Range	Find an Existing Employer via Name or FEIN Number Q. Search by Name or FEIN
NAICS Code	Payroll Frequency	NAME T FEIN NUMBER START DATE END DATE ACTIVE
TIN	SSN # (Last 4 digits)	Court Hotel 45-4906404 2022-05-18 Yes File + Pay
	Payment Remitter	



STEP 1	STEP 2	Step 3
r. Account		
Court Hotel		
Calculate Your Contribution	What are subject earnings?	
* Do you have subject earnings to report? Yes No Total Subject Earnings for Pay Period or Income/Revenue Period (USD)	1402(b), as amended from time to time, that shall not exceed th	(b) of section 31-222 and self-employment income as defined in 26 USC e Social Security contribution and benefit base, as determined pursuant to ent income shall be included only if the recipient has enrolled in the progra
Enter Amount *Which quarter and year is this contribution for?	medium other than cash except the cash value of any remuneral cash" provided that the wages subject to contribution are cappe	dismissal payments, including the cash value of all remuneration paid in an tion paid for agricultural labor or domestic service in any medium other tha ed at the Social Security contribution base. The base for purposes of calculat
*Quater **ear 2	an employee's Paid Family and Medical Leave contribution is the Definition of Self-employment income:	same as that used for determining FICA.
 ves No Rease enter the pay period you are reporting for below. If you are a Sole Proprietor, please enter the income/revenue period you are reporting for below. 		m self-employment derived by an individual (other than a nonresident alien 33 of the Social Security Act) during any taxable year; except that such term
* Pay Period or Income/Revenue Period *Start Date *End Date		f the net earnings from self-employment which is in excess of (i) an amount r section 230 of the Social Security Act) which is effective for the calendar y vages paid to such individual during such taxable years; or
*How many CT employees are included in this contribution? Employee details are not required when remitting via the portal. *Contribution Amount Due 50.00 Enter a different contribution amount:	term "weges" (A) includes such remuneration paid to an employ provisions of section 3122(I) (relating to coverage of citizant employers), as would be weges under section 3121(a) if such ser compensation which is subject to the tax imposed by section 32 reident of the Commonwealth of Pureto Nico, the Vripin Island considered to be a nonresident alien individual. In the case of d purposes of paragraph (2) and (8) includes compensation which a citizen of the United States but who is a resident of the Comm	for the taxable year are less than \$400. For purposes of paragraph (1), the ee for services included under an agreement entered into pursuant to the the United States who are employees of foreign affiliates of American vices constituted employment under section 3121 (b), and (b) includes 01 or 3211. An individual who is not a clitzen of the United States but who is 6, Guam, or American Samoa shall not, for purposes of this chapter be urch employee income, the special rules of subsection (0)(2) shall apply for is subject to the tax imposed by section 3201 or 211. An individual who is nonwealth of Puerto Rico, the Virgin Islands, Guam, or American Samoa shall ent alien individual. In the case of church employee income, the special rule is possible.
Rever Trans		quarterly contribution filing. The reporting quarters (1, 2, 3, and 4) end on . The Quarter for when the wages were paid should be used in determining
	"Reporting Year" is the calendar year starting on January 1st and	d ending on December 31st for which you are filing.

Step 1 of the File & Pay Process:

- Ensure that your client's name appears beneath the word "Account" at the top of the page.
- Indicate "Yes" or "No" to the question: "Do you have subject earnings to report?"
- If "No":
 - $\,\circ\,\,$ The Total Subject Earnings will be set to \$0.00.
 - $\circ~$ Select the quarter and year that you are reporting for.
 - Indicate whether you are reporting for the entire quarter. If you are not, select the pay period or income/revenue period start and end dates.
 - $\,\circ\,\,$ Enter the number of CT employees included in the contribution.
 - $\,\circ\,\,$ The Contribution Amount will be set to \$0.00.
 - $\circ~$ Click Next.
- If "Yes":
 - $\,\circ\,\,$ Enter the total subject earnings for the pay period that you are reporting for.
 - $\circ~$ Select the quarter and year that you are reporting for.
 - Indicate whether you are reporting for the entire quarter. If you are not, select the pay period or income/revenue period start and end dates.
 - $\,\circ\,\,$ Enter the number of CT employees included in the contribution.
 - If the amount shown under Contribution Amount Due is not what you expect to pay, select Enter a different contribution amount and complete the fields that appear. Note that you can only enter a value within +/- \$5.00 of the original contribution amount.

E ACCOUNT	
Provide Supporting Documentation	What are CT gross wages?
The CT Paid Leave Authority will be using the following information to confirm accurate contributions are made. *Total CT Gross Wages for Pay Period or Income/Revenue Period (USD)	If you are a "contributing employer" for purposes of the CT Unemployment Insurance progam, provide the number you listed on line 1 of Connecticut Department of Labor's Form Conn UC-2, the Employee Quarterly Earnings Report. If you are not a contributing
*How many CT employees are included in the CT Gross Wages?	employer, provide the number you listed in section 1, line 2 of the Connecticut Department of Revenue Services' Form CT-941, the Connecticut Quarterly Reconciliation of Withholding.
I, the undersigned, hereby certify that I am authorized to act on behalf of my company/client-employer to remit the contributions to the CT	How will the CT Paid Leave Authority use the
Paid Leave Authority and to provide data relating to such contributions to the CT Paid Leave Authority. I understand that any such actions are subject to audit by the CT Paid Leave Authority. I	supporting documentation?
certify that all statements and data submitted with this remittance, including the payment information and amount, if any, are correct, true and accurate to the best of my knowledge and belief, subject to the penalties of false statement and misrepresentation.	The CT Paid Leave Authority will use the CT Gross Wages being reported to DOL and DRS to validate the contributions being reported to the Connecticut Paid Leave (CTPL) program.
* By clicking here, I attest to the statement above.	

Step 2 of the File & Pay Process:

If no subject earnings are being reported:

- Enter the Total CT Gross Wages (must be greater than or equal to the Total Subject Earnings entered on Step 1).
- Enter the number of CT employees included in the CT Gross Wages.
- Attest to the statement by checking the box.
- Click Next.
- Upon receiving the confirmation message below, click the **Return to Account** button.

Thank You For Reporting
RETURN TO ACCOUNT

If subject earnings are being reported:

- Enter the Total CT Gross Wages (must be greater than or equal to the Total Subject Earnings entered on Step 1).
- Enter the number of CT employees included in the CT Gross Wages.
- Attest to the statement by checking the box.
- Click **Next** to proceed to Step 3.

File & Pay: Step 3 – Setting up New Payment Method

* Payment Method			
Payment Method			
+ Add New]
Start Over R	eturn to Account		
	~	~)	Skep 3
	Account		
By dia	In CHOICE.		
if you t below 4-	we added a new psyment method, this psyment method will be used by the Connecticut Paid Family and Medica will only be debited after your authoritation is obtained.	I Leave Insurance Authority: Payments that fall outside of the debit authorized New Payment Method	
	CREDIT CARD BANK		
	* Name on card	* Card number	
	* Card Expression	-ove	
	Billing email	* Postal code	
	Celault Payment Method		

A payment method must be set up **prior** to having the ability to submit a payment for the corresponding pay period entered in Step 1. If a payment method has already been established, continue to the <u>next page</u>. If not, continue with the instructions below. Payment methods can also be set up in the Payment Methods tab in My Account, outlined <u>here</u>.

- From the "Payment Method" dropdown menu, select +Add New (highlighted in a red box).
- Select the method of payment by clicking on either "**CREDIT CARD**" or "**BANK**". This should be the client's payment information.
- Complete the fields for the payment method you selected.

Credit Card Fields (*= required)	Bank Fields (*= required)
*Name on card	*Name on the Account
*Card Number	*Account Type (select either individual (personal acct) or company (business acct)
*Card Expiry Date	*Routing Number
*CVC Number (from the back of the card)	*Account Number
Billing email	Billing email
*Postal Code	

- Select the **check box** for the field "Default Payment Method" (highlighted in red box) to save the payment method as the default for future payments.
- Click the "Add +" button to add the payment method.
 (Note: the "Reset" button clears all fields in the form.)
- Click the "Done" button on the "Payment Method Was Created" on-screen message.

Payment Method was Created	
f you don't see your payment method as in the Payment Method field, try again. You'll need to confirm your information s correct or it will not be added.	•
	w
)	
Done	

File & Pay: Step 3 – Submitting New Payment

STEP 1	*	Step 3
m Decouot		
📾 Account		
Court Hotel		
ly clicking Process, you authorize the Connecticut Paid Family and Medical Leave Insurance Authority to debit the acc Iedical Leave program. You may amend or cancel this authorization by providing notice to the Connecticut Paid Fami		
f you have added a new payment method, this payment method will be used by the Connecticut Paid Family and Med velow will only be debited after your authorization is obtained.	ical Leave insurance Authority. Payments that fail outside of the debit authorized	
* Action		
New Single Charge		\$
* Payment Method		
New Payment Method		
* Amount	* Currency	
500.00	USD	:
		Process

Once a payment method is set up in the payment portal, you can submit the contribution payment for the pay period that was indicated in Step 1.

- From the "Action" dropdown menu, verify that "New Single Charge" is the option displayed.
- Verify that in the "Related To" field the correct business/account name is displayed. If it is not, you will need to navigate back to your "My Account" landing page and select the correct business/account to file and pay for.
- The "Parent Object" field will pre-populate and will reflect the invoice name.
- Click in the "Payment Method" field and **select the payment method** that was saved.
- The "Amount" field will pre-populated based on the information entered in Step 1.
- The "Currency" field will default to "USD".
- Click the Process button. (Highlighted with a red box.)
- If the payment was successful, you will be redirected to your account. The new invoice will appear in the top row of the Filing History box (See here for Transaction Failed Messaging.)

💼 Court Hotel		🛕 Paymo	nt Announcement			
Registration Number: FEIN Number: 000161705 45:4906404 eturn to My Account 45:4906404	DBA:	recognize that emp	rter payments is one month after the quart oyers and TPAs are working to configure the contributions. We are not assessing fines an	ir systems to ensure that		
	ayment Methods		ir payment, refresh this page as it may take additional questions or concerns, please co		and reflect your	payment.
 Account Information 						
Account Name Court Hotel	Phone	processing payment	If you have submitted your payment but do not yet see it reflected, please do not be concerned. We are actively processing payments and recommend you check back periodically for updates to your account. Payments should be			
DBA	Business Email	updated to your acc contact you.	ount within a week after submission. If there	e is an issue with processi	ng your payment	t, we will
Federal EIN 45-4906404	Primary Business Activity test	,				
CTPL Registration ID 000161705		💷 Filing H	istoru			File + Pay
Type General Partnership			r most recent invoice, please refresh this pa	28		C ⁴ Refresh
Other Business Type		in you do not see you	i most recent invoice, please refresir tins pa	A.e.		C kerresh
		NAME	AMOUNT	FILING PERIOD START DATE	FILING PERIOD END DATE	PROCESSED DATE
 Business Information 		INV-00157956	\$50.00	Apr 1, 2022	Jun 30, 2022	May 18, 2022
Opt In Employer	Employee Size Range 50-99					_

Once a transaction is submitted, you will receive two confirmation pop-ups indicating that the payment was submitted. Note that this does not guarantee that the payment (especially a bank payment) won't fail later on.

	Payment Submitted
Your payment was p details.	rocessed successfully. Please click "Done" to see additional

DETAILS:		
Transaction Name:	TR-121641	
Account Name:	Court Hotel	
Amount Paid:	50.00	
Wages Entered:	10,000.00	
Processed Date:	5/18/2022, 9:20 Pl4	
	Return to Account	

You will also receive a confirmation of submission via email. The email address connected to the payment method will receive a receipt from the CTPL summarizing the transaction submitted. Note that this does not necessarily guarantee that they payment (especially a bank payment) won't fail later on.

	Connecticut Paid Leave				
	Receipt from Paid Family and Medical Leave Insurance Authority				
Dear Diane, You have authorized the Connecticut Paid Family and Medical Leave Insurance Authority to debit the account specified below for amounts owed for the Connecticut Paid Family and Medical Leave program. You may amend or cancel this authorization by providing notice to the Connecticut Paid Family and Medical Leave Insurance Authority.					
Payments that fall outside of the debit authorized be	elow will only be debited after your authorization is obtained.				
	Transaction # TR-121641				
	Amount Paid Processed Date Name Payment Method \$50 5/18/2022; 9:20 PM Visa Visa -4242 Credit				
	Summary Court Hotel-6404 Pay Period Start to Pay Period End 4/1/2022 to 6/30/2022 Wages 510,000 Billing Diane CTPL-Test ericord15:425@gmail.com (123) 456-7890 1 Main St Hartford, CT 06103 Charge will appear as <i>CTPL. Payroll Deduct</i> on your bank statement.				
If	you have any questions, contact us at <u>https://www.ctpaidleave.org/s/contactus</u>				

Regarding Failed Transactions:

- If the transaction fails, you will see a "Transaction Has Failed" message.
- Click on "**Done**" button (highlighted with a **red box**) in the in the "Transaction Failed" message to view a summary of the failed transaction.

Transaction Failed	
Your payment could not be processed. Please click "done" to see additi	onal details.
	Done

Ti	ransaction Failed
Transaction Name	TR-056548
Error Message 🚯	Your card was declined.
Payment Method Holder's Name	John Smith
Brand	Visa
Payment Method Last 4	0341

To retry submitting the transaction:

• Click the "**Retry**" button to return to Step 1 of the payment process.

Ог

• Click the "**Return to Account**" button to return to the account details page.

Returning to My Account

Other Business Type

Opt In Employer

V Business Information

		File + Pay		
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STEP 1		×	Step 3	
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Court Hotel				
	ily and Medical Leave Insurance Authority to debit the account s prization by providing notice to the Connecticut Pald Family and		<i>γ</i> and	
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* Payment Method				•
Visa				
*Amount \$0.00		*Currency USD		:
				Process
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The either of the Ret you return to the buy not see your paym he payment details Court Hotel geration Number: FEN Number or row y Account Infor Contacts Inquiries Private Plan Account Information our there at Hotel Account Information	er DBA:	cons. (Highlighted wi , REFRESH your brow name from the Filin Payment A The deadline for quarter p recognize the employers. paying the required contril After submitting your payr should you have any addit If you have submitted your processing payments and after submitting your payr should you have any addit	th red boxes.) vser screen to update the Fil g History table. NOUNCEMENT wreats is one month after the guatter end, so please remit, your paym in TPAs are working to configure their systems to ensure that they are utions. We are not assessing fires and penalties at this time. nent, refresh this page as it may take a few minutes to update and refle onal questions or concerns, please contact us. payment but do not yet see It reflected, please do not be concerned. It commend you check shack periodically for undates at oyur account. Pu thin a week after submission. If there is an issue with processing your paym the aveek after submission. If there is an issue with processing your paym	ling Histo ents promptly. We correctly filing and ect your payment. We are actively symmets should be
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1

Employee Size Range 50-99

NAME

INV-00157956

If you do not see your most recent invoice, please refresh this page.

AMOUNT

\$50.00

FILING PERIOD FILING PERIOD PROCESSED START DATE END DATE DATE

Jun 30, 2022

Apr 1, 2022

C Refresh

May 18, 2022

Invoice Name: INV-00157942		G	Payment History			
Pay Period Start Date: Pay Period End Date: 2022-04-01 2022-06-30		NAME	AMOUNT	TRANSACTION STATUS	PAYMENT	PROCESSED
Return to Account		TR-121631	\$500.00	Completed	Captured	May 17, 2022
Recurr to Account						
Invoice Info						
Invoice Name INV-00157942	Description 4039: Lloyd's Coffee Shop: 4/1/2022- 6/30/2022					
Status Complete	CT Employee Count 10					
Account Lloyd's Coffee Shop	Input Wage for Pay Period \$100,000.00					
Processed Date 5/17/2022	Pay Period Start Date 4/1/2022					
Refunded Date	Pay Period End Date 6/30/2022					
Failed Date	Reporting Quarter 2					
	Reporting Year 2022					
Calculated Invoice Amount \$500.00	Amount \$500.00					
Default Payment Method	Currency ISO USD					
	Enter a Different Contribution Amount No					
	Override Reason					
	Override Comments					
✓ Supporting Documentation						
CT Employee Count for Gross Wages	CT Gross Wages					
4 ∽ Transaction Rollup Summaries	\$100,000.00					
Refunded Charge Count	Retained Charge Count					
Refunded Charges	1 Retained Charges					
	\$500.00					

Fields are described in further detail on the next page.

Field Name	Explanation of Value
Invoice Name	System generated number tagged to the invoice.
Status	The status of the invoice (Note: This is not the status of the payment, which is the Transaction Status).
Account	CT Paid Leave account the invoice is connected to.
Description	Combination field comprised of - the last 4 digits of the Account FEIN, the name of the Account, and the pay period the invoice represents.
Processed Date	The date on which the invoice was processed.
Refunded Date	The date on which the invoice was refunded (if applicable).
Failed Date	The date on which the invoice failed to process (if applicable).
Calculated Invoice Amount	The amount that was calculated automatically when the "Input Wage for Pay Period" was entered.
Default Payment Method	The default payment method on the account (not necessarily the payment method used here).
CT Employee Count	The number of employees included in the contribution.
Input Wage for Pay Period	Subject earnings amount entered for the specific pay period included in this report.
Pay Period Start Date	Start date for the pay period you are filing for.
Pay Period End Date	End date for the pay period you are filing for.
Reporting Quarter	The quarter for which you are reporting your earnings.
Reporting Year	The year for which you are reporting your earnings.
Amount	Contribution amount the system automatically calculated based on the amount entered for Subject Earnings. This is the amount sent to the CT Paid Leave Authority.
Currency ISO	Always USD
Enter a Different Contribution Amount	Either "Yes" or "No"; indicates whether the user entered a contribution amount that is different than the one calculated from their entered wages.
Override Reason	Either "Rounding" or "Other"; indicates the reason for the user's choice to enter a different contribution amount.
Override Comments	Comments entered by the user to describe their reason for entering a different contribution amount.
CT Employee Count for Gross Wages	The number of employees included in the CT Gross Wages.
CT Gross Wages	CT gross wages amount entered for the specific pay period included in this report.
Refunded Charge Count	Only applicable if a refund is processed against this invoice. Indicates the number of refund transaction(s) processed.
Refunded Charges	Only applicable if a refund is processed against this invoice. Indicates the amount of the refunded transaction(s).
Retained Charge Count	Indicates the number of transaction(s) processed.
Retained Charges	Indicates the amount of the transaction(s) processed.

Viewing the Invoice & Transaction Record

Pay Period Start Date: Pay Period End Date: 2022-04-01 2022-06-30		NAME	AMOUNT	TRANSACTION	PAYMENT	PROCESSED
2022-04-01 2022-06-50		TR-121631	\$500.00	Completed	Captured	May 17, 2022
eturn to Account		/				
oice Info		<u> </u>				
voice Name IV-00157942	Description 4039: Lloyd's Coffee Shop: 4/1/2022- 6/30/2022					
atus	CT Employee Count					
omplete	10 Input Wage for Pay Period					
loyd's Coffee Shop rocessed Date	\$100,000.00 Pay Period Start Date			:I C		
/17/2022	4/1/2022		ew the deta			
efunded Date	Pay Period End Date 6/30/2022	on th	e name of t	he transa	ction.	Each
ailed Date	Reporting Quarter	trans	action begi	ns with "T	'R".	
	2 Reporting Year		lector begin			
	2022			-		
alculated Involce Amount 500.00	Amount \$500.00	You v	vill be redire	ected to t	he Pa	yment
efault Payment Method	Currency ISO USD	Detai	ls page.			
	Enter a Different Contribution Amount No					
	Override Reason					
	Override Comments					
Supporting Documentation						
T Employee Count for Gross Wages	CT Gross Wages \$100,000.00					
 Transaction Rollup Summaries 						
efunded Charge Count	Retained Charge Count					
efunded Charges	Retained Charges					
efunded Charges	Retained Charges \$500.00					

		Field Name	Explanation of Value
Payment Details		Transaction Name	System generated number tagged to the transaction.
Return To Invoice		Transaction Status	Status of the transaction (either Pending, Completed, or Failed).
Transaction Name Transaction Status	TR-121631 Completed	Payment Status	Status of the actual funds (either Authorized, Captured, Refunded, Partially Refunded, or Disputed).
Payment Status	Captured 5/17/2022, 4:14 PM	Processed Date	Date and time payment was filed through the CTPL online payment portal.
Amount 1	500.00	Amount	The amount paid to the CT Paid Leave Authority.

Account + Payment Information

Contact First Name	Lloyd	Information taken fro submitted the paymen	m the contact record for the individual who
Contact Last Name	CTPL-Test		
Contact Mailing Street	1 Main St		
ontact Mailing State	СТ	Field Name	Explanation of Value
ntact Mailing City	Hartford		
ntact Mailing Postal Code	06103	Payment Method	Either the name of the cardholder or the bank
ment Method Holder's Name	Visa	Holder's Name	account owner
		Account Name	CT Paid Leave account the invoice is connected to.
ount Name	Lloyd's Coffee Shop		
yment Method Last 4	4242	Payment Method Last 4	Last four digits of credit card or bank account used in
ment Method Funding	Credit		the payment.
and	Visa	Payment Method Funding	Either Credit or Bank
ment Method Brand	Visa	Brand	Either Visa, Mastercard, ACH
2		Payment Method Brand	Name of the Banking Institution
or Message 🕚		-	-
	_	Туре	Either Charge or ACH
		Error Message	If the transaction failed, an error message will appear here to indicate why it failed.

Disclaimer: All references within this document to the red box are solely for the use of this document and do not reference the website.

File & Pay: Setting up New Payment Method in My Account

0000632	tion Number: 67		FEIN Num 42-535890	2.000	DBA:	
Return to M	Ay Account					
Account I	nfo Contacts	Inquiries	Private Plan	Payment N	Methods	
9	Account Pa	ayment	Methods			Add a Payment
NAME	CARD HOLDER	TYPE	LAST FOUR DIGITS	IS DEFAULT?	PAYMENT METHOD STATUS	REMOVE PAYMENT METHOD
PM- 001284	Bank invalid currency	ACH	4440	No	Verified	Remove
PM- 001283	Debit not authorized	ACH	3335	No	Verified	Remove
PM- 001266	Insuff Funds	Card	9995	No	This Payment Method is Invalid. Please try creating a new correct payment method. Error: Your card has insufficient funds.	Remove
	Bank Account	ACH	1113	No	Verified	Remove
PM- 001264	Closed					

You can add a payment method from your account's **Payment Methods** tab. When you add a payment method here, you will be able to select it and pay with it the next time you process a payment.

- From the Payment Methods tab, select "Add a Payment Method".
- Select the method of payment by clicking on either "CREDIT CARD" or "BANK".
- Complete the fields for the payment method you selected.

Please select the type of payment method: *This selection is required. Bank Credit Card *Name of Cardholder *Card Number *Card Number *Card Expiration Month *Card Expiration Month *Card Expiration Year *CvV *Billing Email *Billing Postal Code Create New Payment Method	
* Name of Cardholder * Card Number * Card Expiration Month * Card Expiration Vear * Card Expiration Vear * Card Expiration Vear * Card Expiration Vear * Card Expiration Code * Billing Email	1
* Card Number * Card Expiration Month * Card Expiration Year * Card Expiration Year * Cvv * Billing Email * Billing Postal Code	
* Card Expiration Month * Card Expiration Vear * Card Expiration Year * Cvv * Billing Email * Billing Postal Code	
* Card Expiration Year * Cyv * Cyv * Billing Email * Billing Postal Code	
* CVV * Billing Email * Billing Postal Code	
* Billing Email * Billing Postal Code	
* Billing Postal Code	
Cancel Create New Payment Method	
Cancel Create New Payment Method	
	2

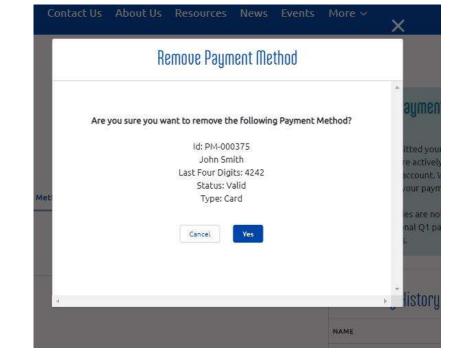
- Select the **checkbox** for the field "Default Payment Method" to save the payment method as the default for future payments.
- Click the "Add +" button to add the payment method. (Note: the "Reset" button clears all fields in the form.)
- Click the "Done" button on the "Payment Method Was Created" an on-screen message.

nt to the red box are solely for the use of this document and do not reference th

File & Pay: Removing a Payment Method in My Account

: 000063267			FEIN Num 42-535890		:	
Return to My /		ries	Private Plan Payr	ment Methods		
	Account Payn	nent (Nethods			Add a Payment
NAME	CARD HOLDER NAME	TYPE	LAST FOUR DIGITS	IS DEFAULT?	PAYMENT METHOD STATUS	REMOVE PAYMENT MET
PM-001325	Visa	Card	4242	No	Valid	Remove
PM-001284	Bank invalid currency	ACH	4440	No	Verified	Remove
PM-001283	Debit not authorized	ACH	3335	No	Verified	Remove
PM-001266	Insuff Funds	Card	9995	No	This Payment Method is Invalid. Please try creating a new correct payment method. Error: Your card has insufficient funds.	Remove
PM-001264	Bank Account Closed	ACH	1113	No	Verified	Remove
PM-001259	Visa	Card	4242	Yes	Valid	Remove

- From the Payment Methods tab, select "**Remove**" next to the payment method you want to remove.
- In the popup, click "**Yes**" to remove the payment method. To keep the payment method, click "**Cancel**."



File & Pay: Editing a Payment Method in My Account

III	Photo Fram	ners				
Registrati	ion Number: 57		FEIN Num 42-53589		DBA:	
eturn to M	y Account					
ccount Ir	nfo Contacts	Inquiries	Private Plan	Payment M	Methods	
	Account Pa	yment	: Methods			Add a Payment
NAME	CARD HOLDER	TYPE	LAST FOUR DIGITS	IS DEFAULT?	PAYMENT METHOD STATUS	REMOVE PAYMENT METHOD
NAME PM- 001284		TYPE ACH			PAYMENT METHOD STATUS	
PM-	NAME Bank invalid		DIGITS	DEFAULT?		METHOD
PM- 001284 PM-	NAME Bank invalid currency Debit not	ACH	DIGITS	DEFAULT?	Verified	METHOD Remove
PM- 001284 PM- 001283	NAME Bank invalid currency Debit not authorized	АСН	DIGITS 4440 33335	No No	Verified Verified This Payment Method is Invalid. Please try creating a new correct payment method.	METHOD Remove Remove

You can edit a payment method from your account's **Payment Methods** tab.

- From the Payment Methods tab, select the payment method's name.
- Edit the desired fields and click "**Save**" to save the information or "**Cancel**" to leave it unchanged. You can only edit the following fields:
 - Expiration Year
 - Expiration Month
 - Default Payment
- If any other fields need to be changed, like the name or card/account number, you should remove the payment method (see instructions <u>here</u>) and add a new one (see instructions <u>here</u>).