



# 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 no later 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](http://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](https://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.

The screenshot displays the user interface of the Connecticut Paid Leave website. At the top, there is a search bar and a "CTTax CTPL-Test" button. The navigation menu includes "Home", "The Process", "Register Your Business", "Contact Us", "About Us", "Resources", "News", "Events", and "CTPL Podcast". The language selector is set to "English".

The main content area is divided into two sections. On the left, under "CT TPA Test", there is a "Return to My Account" link and a tabbed interface with "Account Info" selected. The "Account Information" section includes fields for Account Name (CT TPA Test), DBA, Federal EIN (40-6093094), CTPL Registration ID (000063115), Type, Other Business Type, Business Information (Opt In Employer, NAICS Code, TIN), Employee Size Range, Payroll Frequency, SSN # (Last 4 digits), and Payment Remitter.

On the right, there is a "Payment Announcement" section with a warning icon and text explaining the deadline for quarter payments and the need to refresh the page after submission. Below this is the "Related Employers" section, which includes search filters and a table of related employers.

NAME ↑	FEIN NUMBER	START DATE	END DATE	ACTIVE	
Court Hotel	45-4906404	2022-05-18		Yes	<b>File + Pay</b>

To "File & Pay" on behalf of a client, the TPA/Tax Accountant must:

- Select the specific business (click on the business name or search by the business's name or FEIN) from the Related Employers table.

# File & Pay: Step 1

The screenshot shows the 'Calculate Your Contribution' form for 'Court Hotel' on the Account portal. The form is at Step 1 of a 3-step process. It includes sections for 'Calculate Your Contribution' with various input fields and radio buttons, and informational text on the right regarding 'What are subject earnings?', 'Definition of Self-employment income:', and 'What is a reporting quarter or reporting year?'. A red box highlights the 'Next' button at the bottom of the form.

## 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":
  - The Total Subject Earnings will be set to \$0.00.
  - 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.
  - Enter the number of CT employees included in the contribution.
  - The Contribution Amount will be set to \$0.00.
  - Click **Next**.
- If "Yes":
  - Enter the total subject earnings for the pay period that you are reporting for.
  - 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.
  - 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.**
  - Click **Next**.

Account

Court Hotel

### Provide Supporting Documentation

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)

\* How many CT employees are included in the CT Gross Wages?

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 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 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.

\*  By clicking here, I attest to the statement above.

Previous Step Next

### What are CT gross wages?

If you are a "contributing employer" for purposes of the CT Unemployment Insurance program, 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 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.

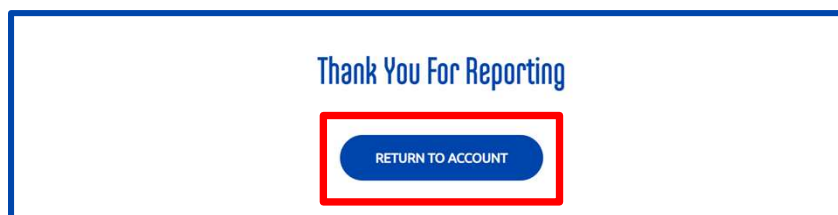
### How will the CT Paid Leave Authority use the supporting documentation?

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.

## 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.



### 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 Return to Account

Account

Court Hotel

By clicking Process, you authorize 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.

If you have added a new payment method, this payment method will be used by the Connecticut Paid Family and Medical Leave Insurance Authority. Payments that fall outside of the debit authorized below will only be debited after your authorization is obtained.

New Payment Method

CREDIT CARD BANK

\* Name on card \* Card number

\* Card Expiration \* CVC

Billing email \* Postal code

Default Payment Method

Add + Reset

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 [next page](#). If not, continue with the instructions below. Payment methods can also be set up in the Payment Methods tab in My Account, outlined [here](#).

- 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

If you don't see your payment method as in the Payment Method field, try again. You'll need to confirm your information is correct or it will not be added.

Done

# File & Pay: Step 3 – Submitting New Payment

The screenshot shows the 'File & Pay' Step 3 interface for 'Court Hotel'. At the top, there is a progress bar with 'STEP 1' in a blue box, a green checkmark, and 'Step 3' in a white box. Below the progress bar is the 'Account' header with the 'Court Hotel' logo. A disclaimer text reads: 'By clicking Process, you authorize 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. If you have added a new payment method, this payment method will be used by the Connecticut Paid Family and Medical Leave Insurance Authority. Payments that fall outside of the debit authorized below will only be debited after your authorization is obtained.' The form contains three main sections: '\* Action' with a dropdown menu set to 'New Single Charge'; '\* Payment Method' with a dropdown menu set to 'New Payment Method'; and '\* Amount' with a text input field containing '500.00' and '\* Currency' with a dropdown menu set to 'USD'. A 'Process' button is highlighted with a red box in the bottom right corner.

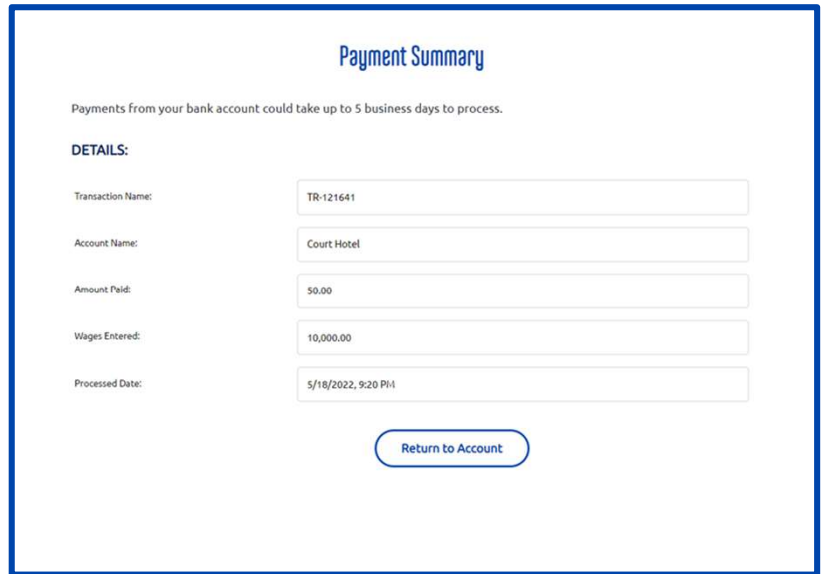
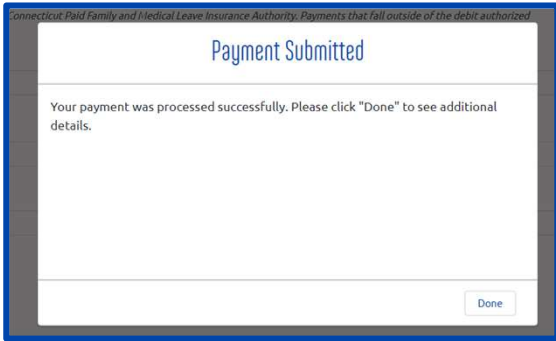
Once a payment method is set up in the payment portal, you can submit the contribution payment for the pay period that was indicated in Step 1.

- 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.](#))

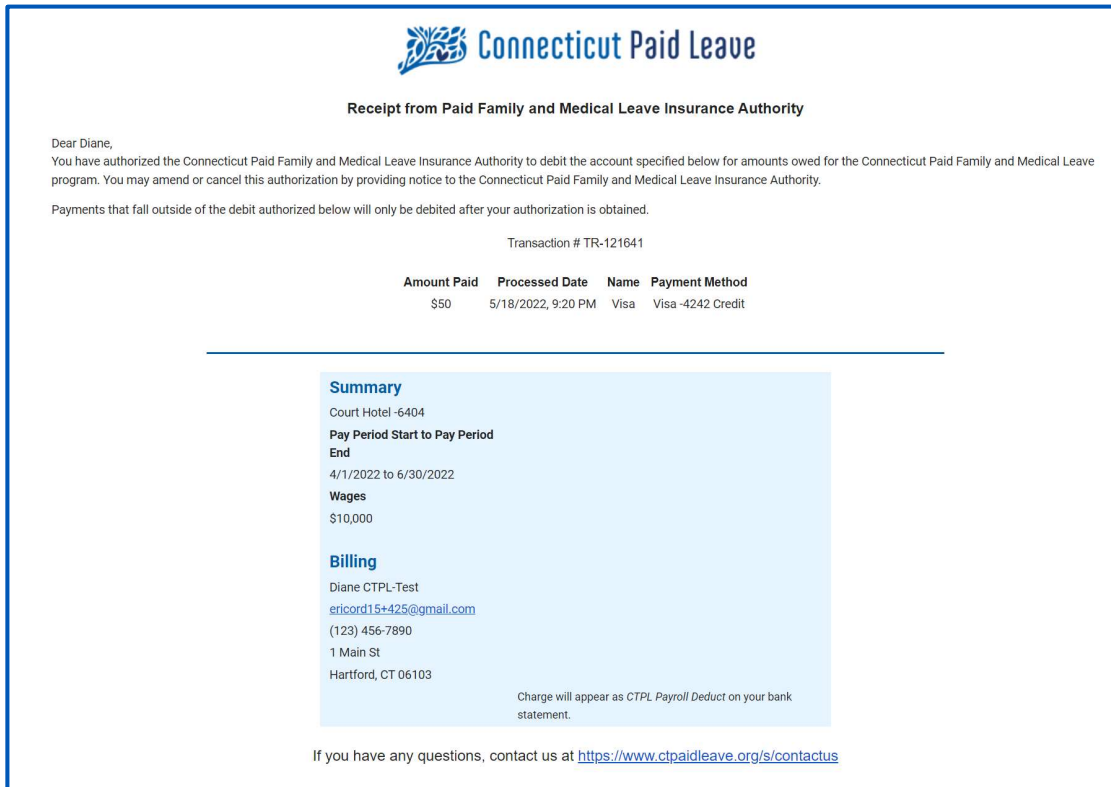
The screenshot shows the 'Court Hotel' account dashboard. On the left, there is a navigation menu with 'Account Info', 'Contacts', 'Inquiries', 'Private Plan', and 'Payment Methods'. The 'Account Information' section is expanded, showing fields for Account Name (Court Hotel), DBA, Federal EIN (45-4906404), CTPL Registration ID (000161705), Type (General Partnership), and Other Business Type. The 'Business Information' section is also expanded, showing 'Opt In Employer' (unchecked) and 'Employee Size Range' (50-99). On the right, there is a 'Payment Announcement' box with a warning icon and text: '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. 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. 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 contact you.' Below the announcement is a 'Filing History' table with a 'File + Pay' button and a 'Refresh' button. The table has columns for NAME, AMOUNT, FILING PERIOD START DATE, FILING PERIOD END DATE, and PROCESSED DATE. The first row is highlighted with a red box: INV-00157956, \$50.00, Apr 1, 2022, Jun 30, 2022, May 18, 2022.

# Transaction Successful Notice: On-screen Summary & Email

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.



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.

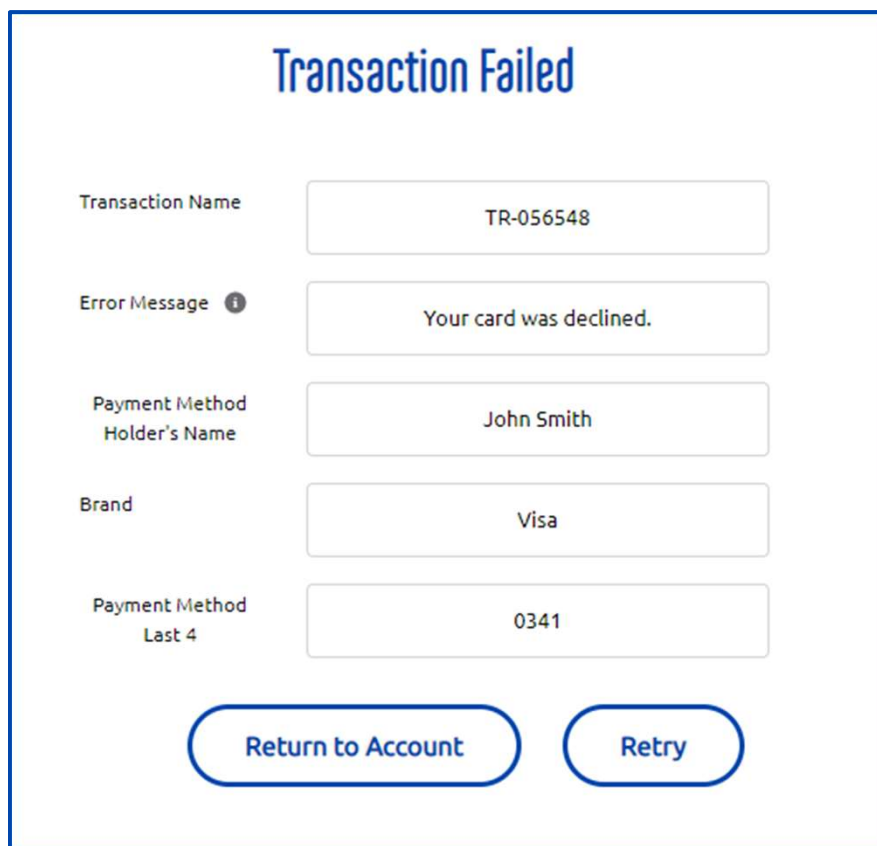
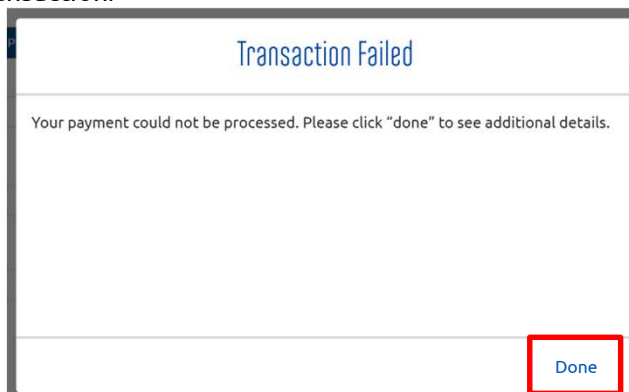




# Transaction Failed Notice: On-screen Summary

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.

A detailed view of the "Transaction Failed" summary screen. The title "Transaction Failed" is at the top. Below it are five input fields with labels on the left: "Transaction Name" (value: TR-056548), "Error Message" (value: Your card was declined., with an information icon), "Payment Method Holder's Name" (value: John Smith), "Brand" (value: Visa), and "Payment Method Last 4" (value: 0341). At the bottom, there are two buttons: "Return to Account" and "Retry".

To retry submitting the transaction:

- Click the “**Retry**” button to return to Step 1 of the payment process.

Or

- Click the “**Return to Account**” button to return to the account details page.

# Returning to My Account

Return to Account

Connecticut Paid Leave

File + Pay

STEP 1

Account

Court Hotel

By clicking Process, you authorize 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.

If you have added a new payment method, this payment method will be used by the Connecticut Paid Family and Medical Leave Insurance Authority. Payments that fall outside of the debit authorized below will only be debited after your authorization is obtained.

\* Action  
New Single Charge

\* Payment Method  
Visa

\* Amount  
\$0.00

\* Currency  
USD

Process

Previous Step

Return to Account

If you are in the payment terminal and want to return to your client's account, follow the steps below:

- Click the either of the **Return to Account** buttons. (Highlighted with red boxes.)
- Once you return to the business' account page, REFRESH your browser screen to update the Filing History table if you do not see your payment listed.

To view the payment details, click on the invoice name from the **Filing History** table.

Court Hotel

Registration Number: 000161705 FEIN Number: 45-4906404 DBA:

Return to My Account

Account Info Contacts Inquiries Private Plan Payment Methods

Account Information

Account Name: Court Hotel Phone: Business Email: Primary Business Activity: test

DBA: Federal EIN: 45-4906404 CTPS Registration ID: 000161705 Type: General Partnership Other Business Type: Business Information Opt In Employer: Employee Size Range: 50-99

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.

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.


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 contact you.

Filing History

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


NAME	AMOUNT	FILING PERIOD START DATE	FILING PERIOD END DATE	PROCESSED DATE
INV-00157956	\$50.00	Apr 1, 2022	Jun 30, 2022	May 18, 2022

# Viewing the Invoice Record

 **Invoice Name:**  
INV-00157942

Pay Period Start Date: 2022-04-01      Pay Period End Date: 2022-06-30

[Return to Account](#)

 **Payment History**

NAME	AMOUNT	TRANSACTION STATUS	PAYMENT STATUS	PROCESSED DATE
TR-121631	\$500.00	Completed	Captured	May 17, 2022

**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	<a href="#">Lloyd's Coffee Shop</a>	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	
<b>Supporting Documentation</b>			
CT Employee Count for Gross Wages	4	CT Gross Wages	\$100,000.00
<b>Transaction Rollup Summaries</b>			
Refunded Charge Count		Retained Charge Count	1
Refunded Charges		Retained Charges	\$500.00

Fields are described in further detail on the next page.

## Viewing the Invoice Record, cont.

Field Name	Explanation of Value
Invoice Name	System generated number tagged to the invoice.
Status	The status of the invoice ( <b>Note:</b> 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

**Invoice Name:**  
INV-00157942

**Pay Period Start Date:** 2022-04-01  
**Pay Period End Date:** 2022-06-30

**Return to Account:**

**Invoice Info**

Invoice Name: INV-00157942  
Status: Complete  
Account: [Lloyd's Coffee Shop](#)  
Processed Date: 5/17/2022  
Refunded Date:  
Failed Date:

Calculated Invoice Amount: \$500.00  
Default Payment Method:

**Supporting Documentation**

CT Employee Count for Gross Wages: 4

**Transaction Rollup Summaries**

Refunded Charge Count:  
Refunded Charges:

**Payment History**

NAME	AMOUNT	TRANSACTION STATUS	PAYMENT STATUS	PROCESSED DATE
TR-121631	\$500.00	Completed	Captured	May 17, 2022

To view the details of your payment, click on the name of the transaction. Each transaction begins with "TR".

You will be redirected to the Payment Details page.

**Payment Details**  
TR-121631

**Return To Invoice**

Transaction Name: TR-121631  
Transaction Status: Completed  
Payment Status: Captured  
Processed Date: 5/17/2022, 4:14 PM  
Amount: 500.00

**Account + Payment Information**

Contact First Name: Lloyd  
Contact Last Name: CTPL-Test  
Contact Mailing Street: 1 Main St  
Contact Mailing State: CT  
Contact Mailing City: Hartford  
Contact Mailing Postal Code: 06103  
Payment Method Holder's Name: Visa  
Account Name: Lloyd's Coffee Shop  
Payment Method Last 4: 4242  
Payment Method Funding: Credit  
Brand: Visa  
Payment Method Brand: Visa  
Type:  
Error Message:

Field Name	Explanation of Value
Transaction Name	System generated number tagged to the transaction.
Transaction Status	Status of the transaction (either Pending, Completed, or Failed).
Payment Status	Status of the actual funds (either Authorized, Captured, Refunded, Partially Refunded, or Disputed).
Processed Date	Date and time payment was filed through the CTPL online payment portal.
Amount	The amount paid to the CT Paid Leave Authority.

Information taken from the contact record for the individual who submitted the payment.

Field Name	Explanation of Value
Payment Method Holder's Name	Either the name of the cardholder or the bank account owner
Account Name	CT Paid Leave account the invoice is connected to.
Payment Method Last 4	Last four digits of credit card or bank account used in the payment.
Payment Method Funding	Either Credit or Bank
Brand	Either Visa, Mastercard, ACH
Payment Method Brand	Name of the Banking Institution
Type	Either Charge or ACH
Error Message	If the transaction failed, an error message will appear here to indicate why it failed.

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

Photo Framers

Registration Number: 000063267      FEIN Number: 42-5358903      DBA:

[Return to My Account](#)

[Account Info](#)   [Contacts](#)   [Inquiries](#)   [Private Plan](#)   **[Payment Methods](#)**

### Account Payment Methods

[Add a Payment](#)

NAME	CARD HOLDER NAME	TYPE	LAST FOUR DIGITS	IS DEFAULT?	PAYMENT METHOD STATUS	REMOVE PAYMENT METHOD
PM-001284	Bank invalid currency	ACH	4440	No	Verified	<a href="#">Remove</a>
PM-001283	Debit not authorized	ACH	3335	No	Verified	<a href="#">Remove</a>
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.	<a href="#">Remove</a>
PM-001264	Bank Account Closed	ACH	1113	No	Verified	<a href="#">Remove</a>
PM-001259	Visa	Card	4242	Yes	Valid	<a href="#">Remove</a>

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.

### Add Payment Method

Please select the type of payment method:  
\*This selection is required.

Bank  
 Credit Card

\* Name of Cardholder

\* Card Number

\* Card Expiration Month

\* Card Expiration Year

\* CVV

\* Billing Email

\* Billing Postal Code

[Cancel](#)   [Create New Payment Method](#)

- 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" on-screen message.

# File & Pay: Removing a Payment Method in My Account

Photo Framers

FEIN Number: 42-5358903

Return to My Account

Account Info Contacts Inquiries Private Plan **Payment Methods**

Account Payment Methods [Add a Payment](#)

NAME	CARD HOLDER NAME	TYPE	LAST FOUR DIGITS	IS DEFAULT?	PAYMENT METHOD STATUS	REMOVE PAYMENT METHOD
PM-001325	Visa	Card	4242	No	Valid	<b>Remove</b>
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

You can remove a payment method from your account's **Payment Methods** tab. When you remove a payment method here, you will be not able to see it in the payment terminal or process a payment with it.


- 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**."

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### Remove Payment Method

Are you sure you want to remove the following Payment Method?

Id: PM-000375  
John Smith  
Last Four Digits: 4242  
Status: Valid  
Type: Card




## Photo Framers

Registration Number: 000063267      FEIN Number: 42-5358903      DBA:

[Return to My Account](#)

Account Info   Contacts   Inquiries   Private Plan   **Payment Methods**



### Account Payment Methods

[Add a Payment](#)

NAME	CARD HOLDER NAME	TYPE	LAST FOUR DIGITS	IS DEFAULT?	PAYMENT METHOD STATUS	REMOVE PAYMENT METHOD
PM-001284	Bank invalid currency	ACH	4440	No	Verified	<a href="#">Remove</a>
PM-001283	Debit not authorized	ACH	3335	No	Verified	<a href="#">Remove</a>
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.	<a href="#">Remove</a>
PM-001264	Bank Account Closed	ACH	1113	No	Verified	<a href="#">Remove</a>
PM-001259	Visa	Card	4242	Yes	Valid	<a href="#">Remove</a>

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 [here](#)) and add a new one (see instructions [here](#)).