A Guide to Your CTPL “My Account”

> For Third Party Payroll Companies and Tax Accountants
What is “My Account”?

Once you have registered your business, “My Account” can be used to view and edit the information you have submitted on the CTPL website.

The “My Account” pages provide detail on your contact information as well as details related to your registered business(es), which can be updated accordingly.

You can process payments on behalf of your clients through the virtual terminal.

You can review your submitted inquiries and their statuses. Resource links are also provided for your reference.

There is also the ability to link businesses together if needed - a tax accountant to an employer or vice versa.
Accessing My Account

My Account drop-down menu options

1. **My Account** – access information regarding your account with CTPL, including payment history, contacts, resources, etc. It DOES NOT include information about your claims.
2. **User Settings** – link to your profile on ct.gov.
3. **Contact Support** – link to the Contact Us form found on the website.
4. **FAQs** – link to the Frequently Asked Questions found on the website.
5. **Sign Out** – log out of your account.

From the **My Account** landing page, you can view your contact information and:
- The business **Account(s)** you are associated with (click on its name to load its information). **Please note that these are businesses where you are an employee; these are NOT your clients.**
- Any **Inquiries** you submitted through the Contact Us form.
- View and update your **Contact Info**.
- The **CTPL Resources** that apply to your specific business type (Employer, Sole Proprietor/Self-Employed, or TPA/Tax Accountant).

The following pages will outline what will be visible when the business’ account name on the **My Account** landing page is selected.
The screen shown on this page will display when the business’ account name on the My Account landing page is selected.

The business page has five main sections:
- **Account Info**
- **Contacts**
- **Inquiries**
- **Private Plan**
- **Payment Methods**

The following pages will highlight the tabs listed above, as well as:
- The **Filing History** box may not be visible in your TPA or Tax Accountant account, but it will be visible in your client’s account. It is where you can access the secure online payment portal and view your client’s payment information. The TPA & Tax Accountant Payment Guide can guide you through the process of making a payment by clicking **File + Pay**. For more information on the Filing History box, see here.
- The **Amended Return Refunds** box displays any outstanding amended return refunds associated with your client’s account. For more information, see here.
- The **Related Employers** box lists your clients for whom you remit payments. For more information, see here.
Once you add a client in the Related Employers box, you can view their account information as well as make payments on their behalf.

To link accounts with your clients:

- Enter their FEIN Number into the search bar and click the Search button.
- Verify that the name of their business appears along with the Link Accounts button
- Click Link Accounts
- The TPA/Tax Accountant will appear in the list with the “Active” field displaying “Yes.” The “Start Date” will be today’s date.

Once you have linked accounts, you will always be able to access their account and make payments on behalf of them.

If the “Active” field displays “No,” that means that your client has indicated that you are no longer their TPA or Tax Accountant. However, you will still be able to access their account and make payments on behalf of them.
The **Filing History** box may not be visible to you in your own TPA/Tax Accountant account. The below information is mostly for your reference as you remit payments on behalf of your clients.

To remit payments on behalf of your clients, click **File + Pay** next to that client’s name in the **Related Employers** box OR in the **Filing History** box. From there, you can enter the payment terminal and process a payment. More information on that process can be found in the **TPA & Tax Accountant Payment Guide**.

Once you have submitted the payment, click on the hyperlinked invoice that appears at the top of the Filing History box (you may have to click **Refresh** to refresh the page in order to see the new invoice).

---

# Filing History

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

<table>
<thead>
<tr>
<th>NAME</th>
<th>AMOUNT</th>
<th>FILING PERIOD START DATE</th>
<th>FILING PERIOD END DATE</th>
<th>PROCESSED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>INV-00420365</td>
<td>$0.50</td>
<td>Aug 1, 2021</td>
<td>Aug 1, 2021</td>
<td>Jan 19, 2022</td>
</tr>
<tr>
<td>INV-00420361</td>
<td>$0.00</td>
<td>Oct 1, 2021</td>
<td>Dec 31, 2021</td>
<td>Jan 19, 2022</td>
</tr>
</tbody>
</table>

---

**Invoice Name:** INV-00117942

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

**Filing History**

<table>
<thead>
<tr>
<th>NAME</th>
<th>AMOUNT</th>
<th>TRANSACTION STATUS</th>
<th>PAYMENT STATUS</th>
<th>PROCESSED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>TH-04321</td>
<td>$200.00</td>
<td>Completed</td>
<td>Captured</td>
<td>May 17, 2022</td>
</tr>
</tbody>
</table>

---

**Invoice Info**

- **Invoice Name:** INV-00117942
- **Status:** Complete
- **Account:** Lloyd’s Coffee Shop
- **Processed Date:** 5/17/2022
- **Refunded Date:**
- **Failed Date:**
- **Calculated Invoice Amount:** $200.00
- **Default Payment Method:**

**Supporting Documentation**

- **CT Employee Count for Gross Wages:** 4

**Transaction Rollup Summaries**

- **Refunded Charge Count:**
- **Refunded Charges:**

**Description:** 4639 Lloyd’s Coffee Shop 4/1/2022 - 6/30/2022

**CT Employee Count:** 15

**Input Wage For Pay Period:** $1000.00

**Pay Period Start Date:** 4/1/2022

**Pay Period End Date:** 6/30/2022

**Reporting Quarter:** 2

**Reporting Year:** 2022

**Amount:** $200.00

**Currency ISO:** USD

**Enter a Different Contribution Amount:** No

**Override Reason:**

**Override Comments:**

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

To view the details of your client’s payment, click on the name of the transaction. Each transaction begins with “TR”.

You will be redirected to the Payment Details page.

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

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Explanation of Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Method Holder’s Name</td>
<td>Either the name of the cardholder or the bank account owner</td>
</tr>
<tr>
<td>Account Name</td>
<td>CT Paid Leave account the invoice is connected to.</td>
</tr>
<tr>
<td>Payment Method Last 4</td>
<td>Last four digits of credit card or bank account used in the payment.</td>
</tr>
<tr>
<td>Payment Method Funding</td>
<td>Either Credit or Bank</td>
</tr>
<tr>
<td>Brand</td>
<td>Either Visa, Mastercard, ACH</td>
</tr>
<tr>
<td>Payment Method Brand</td>
<td>Name of the Banking Institution</td>
</tr>
<tr>
<td>Type</td>
<td>Either Charge or ACH</td>
</tr>
<tr>
<td>Error Message</td>
<td>If the transaction failed, an error message will appear here to indicate why it failed.</td>
</tr>
</tbody>
</table>
The **Amended Return Refunds** box displays any outstanding amended return refunds associated with your or your client’s account. If you are unable to view the Filing History box in your own account, you also won’t be able to view this one.

### Amended Return Refunds

**PENDING REFUNDS: $0**

Refunds will not be issued automatically since your Returns might not be finalized and may require additional amendments. If your Returns are complete and you believe a refund is owed, please [Contact Us](#). Refunds cannot be applied to future payments. If you are not seeing your most recent pending refund request, please refresh this page.

<table>
<thead>
<tr>
<th>NAME</th>
<th>AMOUNT</th>
<th>ORIGINAL TRANSACTION</th>
<th>STATUS</th>
<th>DATE REFUNDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR-099413</td>
<td>$2.50</td>
<td>TR-097396</td>
<td>Refunded</td>
<td>May 27, 2022</td>
</tr>
</tbody>
</table>

---

**Payment Details**

TR-099413

**Return To Account**

- Transaction Name: TR-099413
- Transaction Status: Completed
- Payment Status: Refunded
- Processed Date: 4/8/2022, 12:22 PM
- Amount: $2.50

**Account + Payment Information**

- Contact First Name: 
- Contact Last Name: 
- Contact Mailing Street: 
- Contact Mailing State: 
- Contact Mailing City: 
- Contact Mailing Postal Code: 
- Payment Method Holder’s Name: 
- Account Name: 
- Payment Method: Credit Card
- Payment Method Funding: 
- Brand: 
- Payment Method Brand: 
- Type: 
- Error Message: 

---

Some of the fields are left blank on purpose because the original transaction was submitted through the batch process.
The **Account Info** tab displays the business’ information gathered during the registration process.

You can view this information for your own account or for your client’s by clicking on your client’s name in the **Related Employers** box.

**Note:**
Only fields that have a pencil icon are editable. They include:
- Account Name
- DBA
- Type
- Other Business Type
- Phone
- Business Email
- Primary Business Activity
- NAICS Code
- TIN
- Employee Size Range
- Payroll Frequency
- Payment Remitter
- Professional Employer Organization (intended for TPAs only)
- CT Secretary of the State Business ID No
- State EIN
- Billing Address
- Shipping Address

If you applied for a private plan, information about your application’s status will appear in the **Private Plan Information** section.
When you add a new user to the account, that user will be able to view and edit the information for this account when they create credentials and log in with ctpaidleave.org. They will also be able to make payments on behalf of the business.

When the new user creates credentials when first signing into ctpaidleave.org, they must use the same first name, last name, and email address, or else the system will not recognize that they are the same user that you added. You can add new users that already have existing credentials with CTPL, as long as you use the same first name, last name, and email address that they used to register.

**How to Create a Contact:**

Complete the required fields:
- Role (select from the dropdown)
- First Name
- Last Name
- Email Address

Then, click the Create Contact button.
The **Contacts** Tab and Removing a User

### Removing contacts:

If an employee leaves the company and/or should no longer have access to your account, you can remove them from the account.

- Click the dropdown arrow next to that contact record.
- Select **Edit Contact Relationship**.

#### The Edit Contact Relationship modal will appear.

**To change the contact’s role title,** select an alternate title in the **Role** dropdown list.

**To remove the contact from the account:**

- Click on the calendar icon in the “End Date” field and select the date on which the user should no longer be able to access the business’ information.
- Click the **Update Record** button to complete the process.
- The “Active” field will now display “No,” indicating that the contact is no longer active.
- After the selected End Date has passed, the contact will no longer be able to access the account’s information in My Account when they log into the CTPL site.
Inquiries that are submitted through the Contact Us form will appear in the **Inquiries** tabs. **You will NOT be able to see your claims here.** Claims can only be viewed through the Aflac portal on the **For Claims** page.

**Viewing the Status of your case:**
You will not be able to click into the cases to see the details of your inquiry, but you can see the **Status.** It will be one of the following:
- **New (recently submitted)**
- **Researching**
- **Researching IT**
- **Pending Customer Response (you must respond to the latest communication from CTPL in order for the case to move forward)**
- **Pending Changes**
- **Payment Pending**
- **Escalated to Aflac (your case has been transferred from CTPL to the Aflac support team)**
- **Pending Aflac Follow-up (your case is with Aflac and requires action on their part)**
- **Escalated**
- **Closed (your case is closed; you will no longer be receiving communications about it)**

The **Inquiries** tab displays any **Contact Us** submissions associated with the account.

**Please note** that if you have multiple businesses registered, the next time you submit a Contact Us form, the submission will appear in the Inquiries tab of the most recently registered account, as well as the Inquiries tab on the My Account page for your user.

To submit a new inquiry,
1. Click the **New** button.
2. You will be brought to the **Contact Us** page on the website where you can complete the form and click **Submit**.
3. Navigate back to **My Account** by clicking “My Account” in the button with your name in the top righthand corner of the website.
4. Click on the **Inquiries** tab to see the new inquiry listed. You can also click on the name of the last account listed in your list of accounts and navigate to the **Inquiries** tab there.
If the TPA / Tax Accountant is a business in the state of CT with one or more employees, they will need to register as a TPA **AND** as an Employer.

If the TPA / Tax Accountant business wants to request approval from the CT Paid Leave Authority to provide a private plan to their employees, rather than participate in the CT’s program:

- Click the **Request Approval** button from the **Private Plan** tab.
- Indicate what type of plan you are requesting approval for
- Complete the remainder of the form and provide the documentation requested.
- Click **Submit**.
- For a complete step-by-step guide on how to request approval for a Private Plan, review the Apply for a Private Plan checklist on the Register Your Business page.
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.

• Click the Create New Payment Method button to add the payment method.
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.”