A Guide to Your CTPL "My Account"

> For Third Party Payroll Companies and Tax Accountants

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

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.

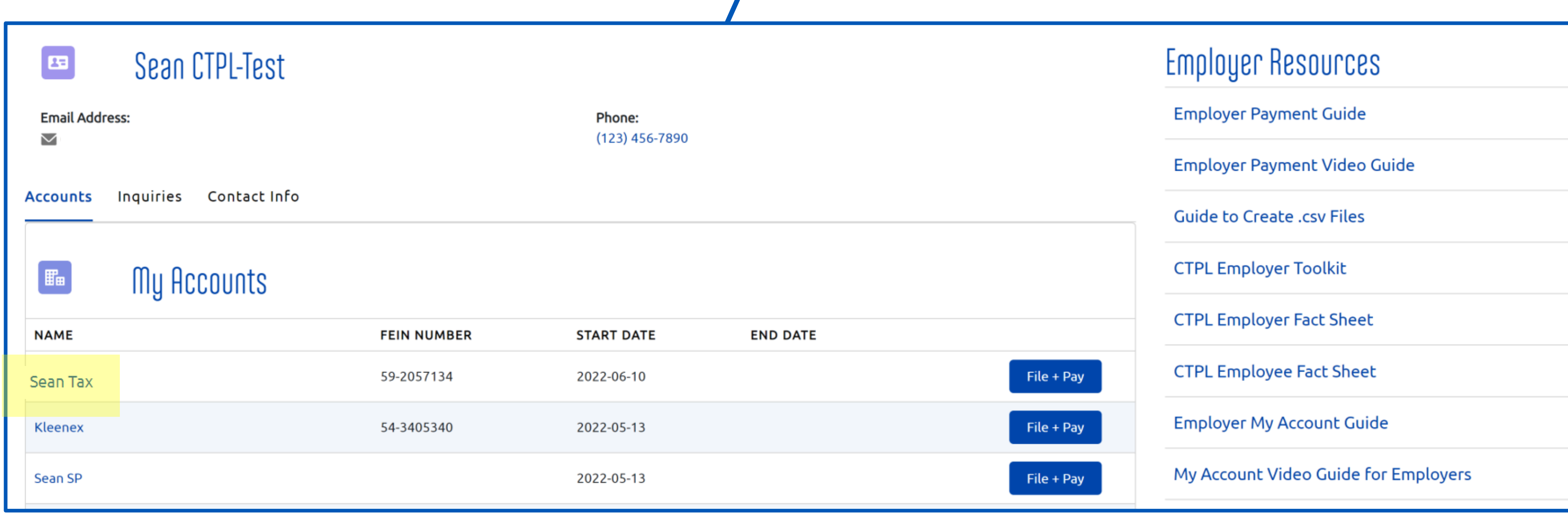
My Account drop-down menu options

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.

My Account landing page



The following pages will outline what will be visible when the business' account name on the **My Account** landing page is selected.

My Account – Your Business' Information

The screen shown on this page will display when the business' account name on the **My Account** landing page is selected.

Sean Tax

Registration Number: 000159551
FEIN Number: 59-2057134
DBA:

Return to My Account

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

Account Information

Account Name
Sean Tax

Phone

DBA

Business Email

Federal EIN
59-2057134

Primary Business Activity
test - batch return registered in terminal

CTPL Registration ID
000159551

Type
Limited Partnership taxed as a C Corporation

Other Business Type

Business Information

Opt In Employer

Employee Size Range
10-19

NAICS Code
111111

Payroll Frequency
Bi-weekly

TIN

SSN # (Last 4 digits)

Payment Remitter
A Third-Party Administrator

Private Plan Information

Has Approved Private Plan

Application Decision Date

Private Plan Application Type

Plan Reason for Denial

Private Plan Application Status

Registration Information

Employer Registered

Professional Employer Organization

Employer Registered Date
6/10/2022

TPA Registered

Employer Registrant Name
Sean CTPL-Test

TPA Registered Date

TPA Registrant Name

CT Business Information

Business Status

CT Secretary of the State Business ID No

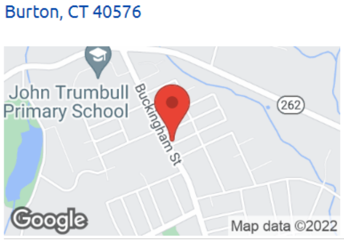
Business Formed Date

Date of Discontinuance

Address Information

Billing Address
696 Jefferson Crescent
Burton, CT 40576

Shipping Address



Filing History

File + Pay

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

Refresh

NAME	AMOUNT	FILING PERIOD START DATE	FILING PERIOD END DATE	PROCESSED DATE
INV-00158034	$0.00	Apr 1, 2022	Jun 30, 2022	Jun 14, 2022
INV-00157927	$5.00	Apr 1, 2022	Jun 30, 2022	May 16, 2022
INV-00157630	$5.00	Mar 12, 2022	Apr 11, 2022	Apr 11, 2022

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.

Refresh

NAME	AMOUNT	ORIGINAL TRANSACTION	STATUS	DATE REFUNDED

There are no refund transactions to display.

Related Employers

Find A New Employer via FEIN Number
xx-xxxxxxx
Search

Find an Existing Employer via Name or FEIN Number
Search by Name or FEIN

NAME	FEIN NUMBER	START DATE	END DATE	ACTIVE	
AECOM	59-2057134	2022-05-16		Yes	File + Pay
Wise Solutions	10-0810716	2022-06-15		Yes	File + Pay
Pat's Coffee Shop	12-1234567	2022-06-15		Yes	File + Pay
Kleenex	54-3405340	2022-06-30	2022-06-30	No	File + Pay

The business page has five main sections:

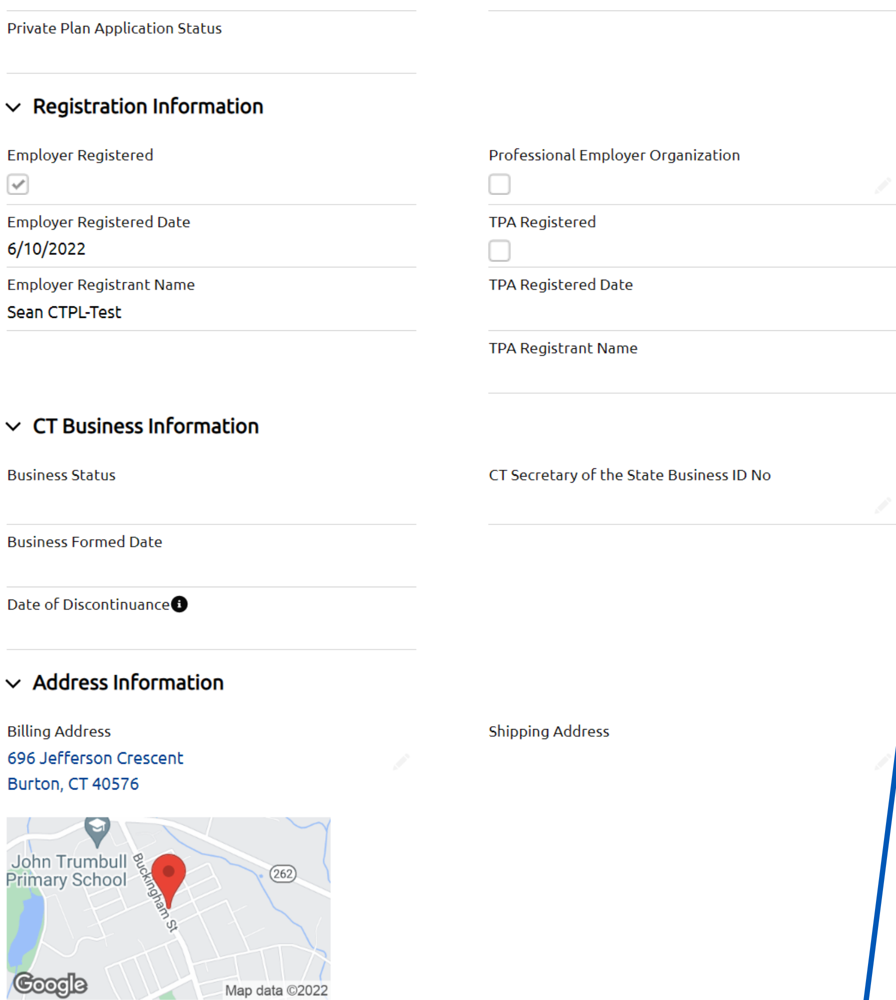
- **Account Info**
- **Contacts**
- **Inquiries**
- **Private Plan**
- **Payment Methods**

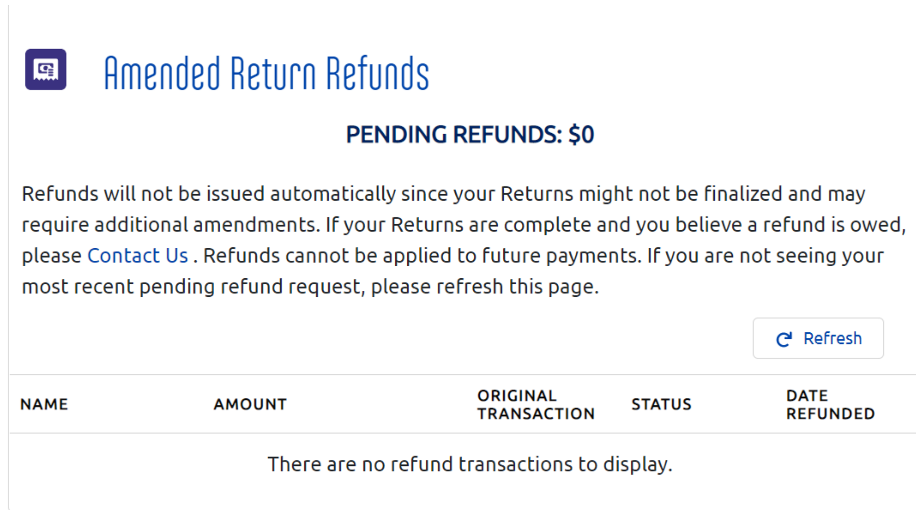
The following pages will highlight the tabs listed above, as well as:

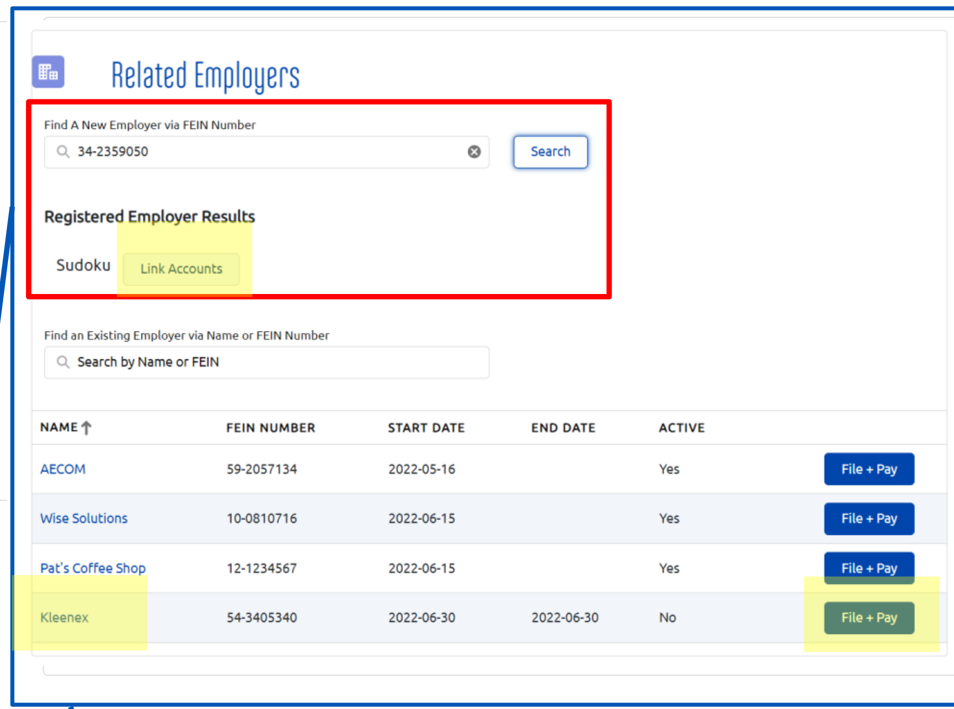
- The **Filing History** box may not be visible in your TPA or Tax Accountant account, but it will be visible in your client's account. It is where you can access the secure online payment portal and view your client's payment information. The TPA & Tax Accountant Payment Guide can guide you through 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.

Accessing Your Clients through the **Related Employers** box

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.

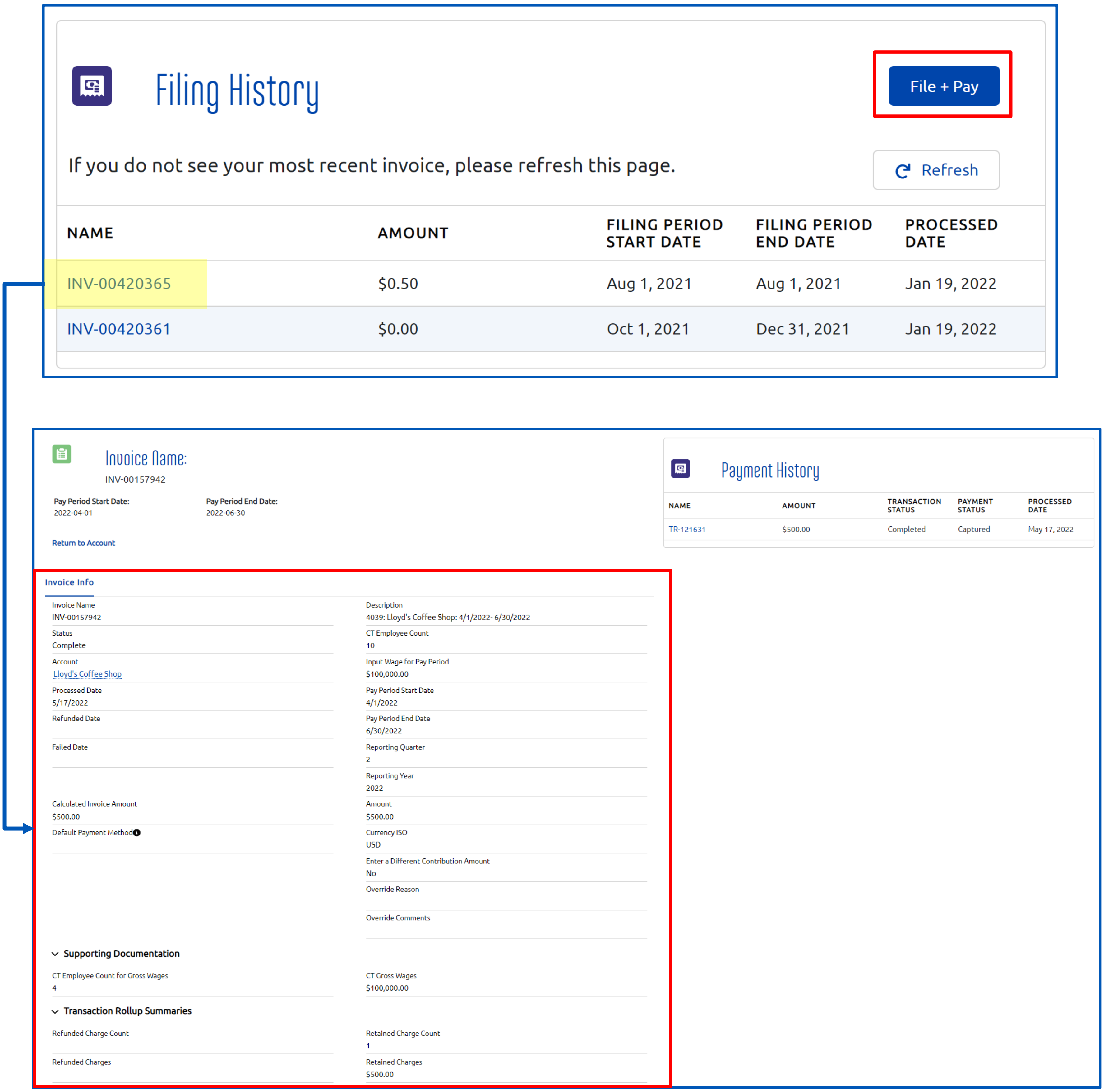
Click on your client's name to enter their account. From there, you can access the payment terminal. You can also enter the client's payment terminal by clicking **File + Pay** next to the client's account name in your **Related Employers** box.

The Filing History box and Accessing An Invoice

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).



Fields are described in further detail on the next page.

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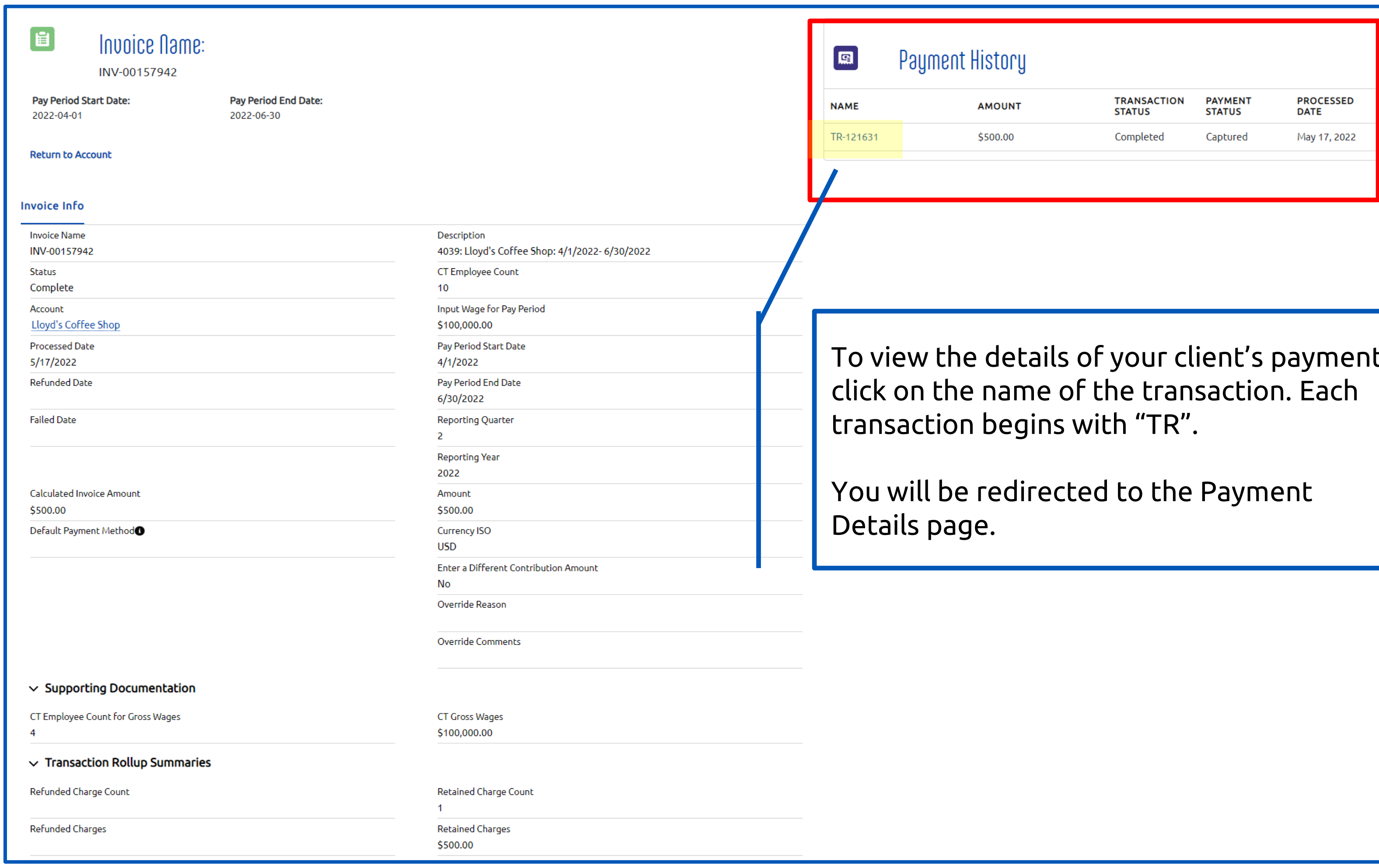
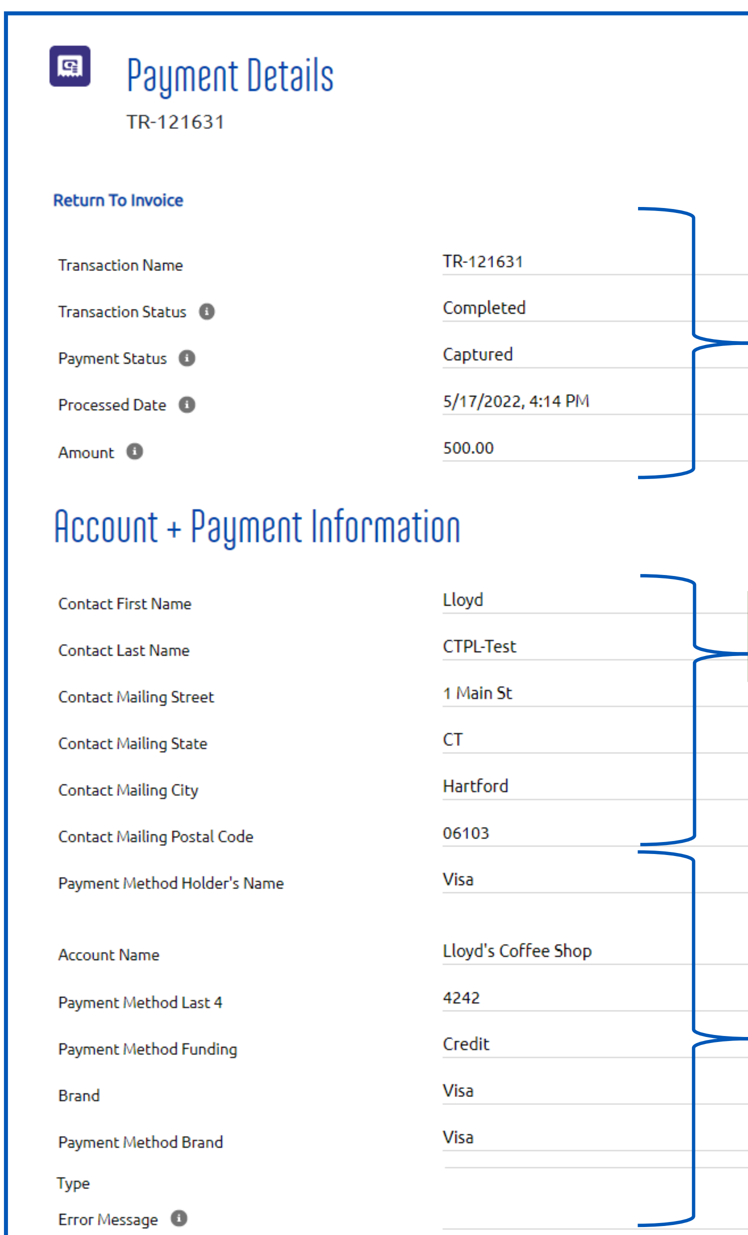
Field Name	Explanation of Value
Invoice Name	System generated number tagged to the invoice.
Status	The status of the invoice (Note: This is not the status of the payment, which is the Transaction Status).
Account	CT Paid Leave account the invoice is connected to.
Description	Combination field comprised 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.

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.



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.

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.

Refresh

NAME	AMOUNT	ORIGINAL TRANSACTION	STATUS	DATE REFUNDED
TR-099413	$2.50	TR-097396	Refunded	May 27, 2022

Payment Details

TR-099413

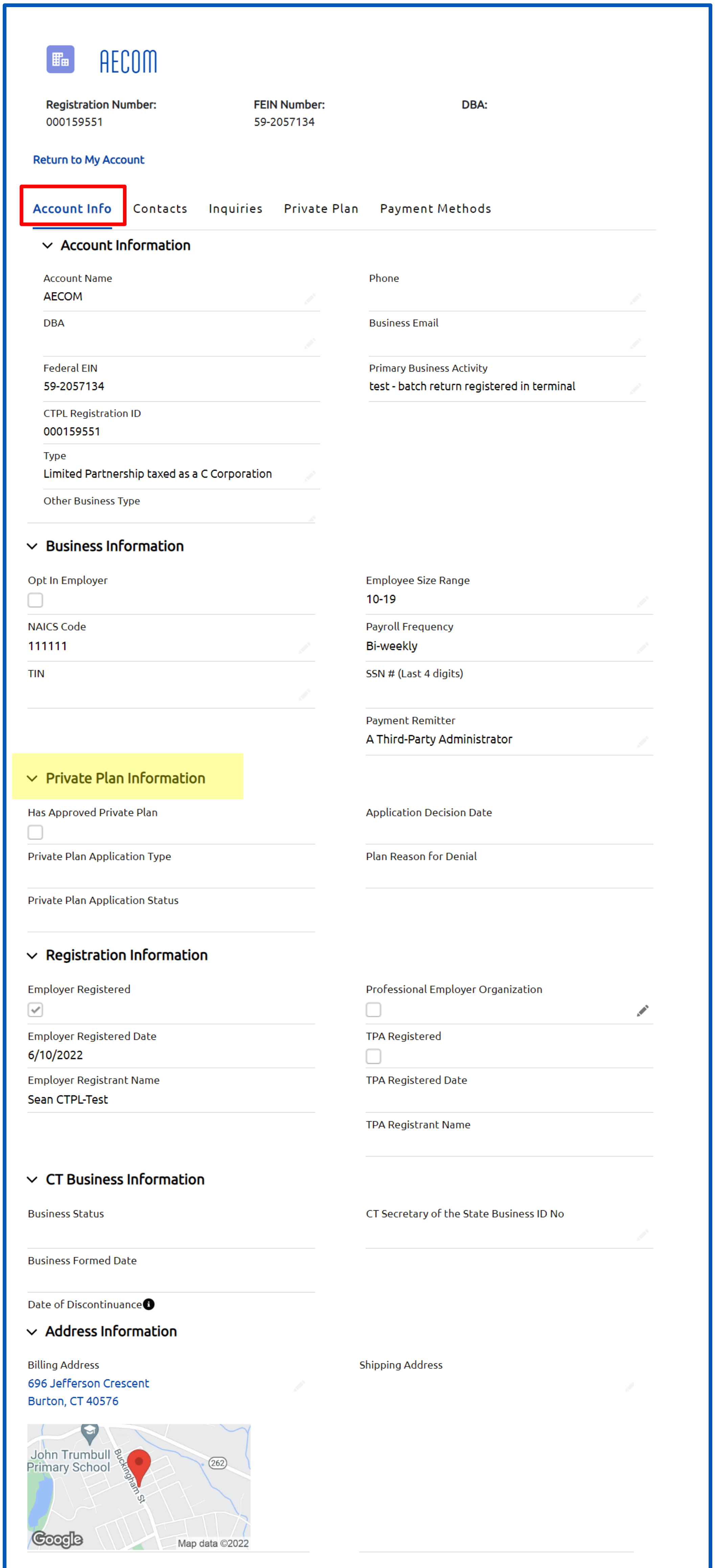
Return To Account

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	Chargepal
Payment Method Last 4	
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.



AECOM

Registration Number: 000159551
FEIN Number: 59-2057134
DBA:

Return to My Account

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

Account Information

Account Name: AECOM
Phone:
DBA:
Business Email:
Federal EIN: 59-2057134
Primary Business Activity: test - batch return registered in terminal
CTPL Registration ID: 000159551
Type: Limited Partnership taxed as a C Corporation
Other Business Type:

Business Information

Opt In Employer:
Employee Size Range: 10-19
NAICS Code: 111111
Payroll Frequency: Bi-weekly
TIN:
SSN # (Last 4 digits):
Payment Remitter: A Third-Party Administrator

Private Plan Information

Has Approved Private Plan:
Application Decision Date:
Private Plan Application Type:
Plan Reason for Denial:
Private Plan Application Status:

Registration Information

Employer Registered:
Professional Employer Organization:
Employer Registered Date: 6/10/2022
TPA Registered:
Employer Registrant Name: Sean CTPL-Test
TPA Registered Date:
TPA Registrant Name:

CT Business Information

Business Status:
CT Secretary of the State Business ID No:
Business Formed Date:
Date of Discontinuance

Address Information

Billing Address: 696 Jefferson Crescent, Burton, CT 40576
Shipping Address:

The **Account Info** tab displays the business' information gathered during the registration process.

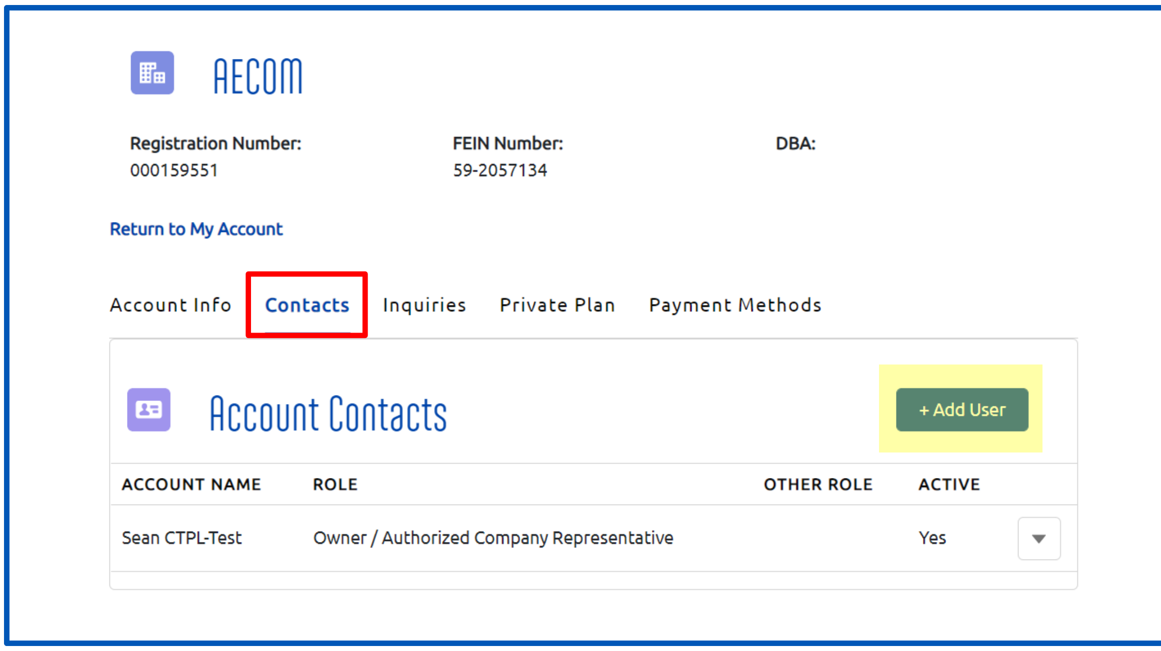
You can view this information for your own account or for your client's by clicking on your client's name in the **Related Employers** box.

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

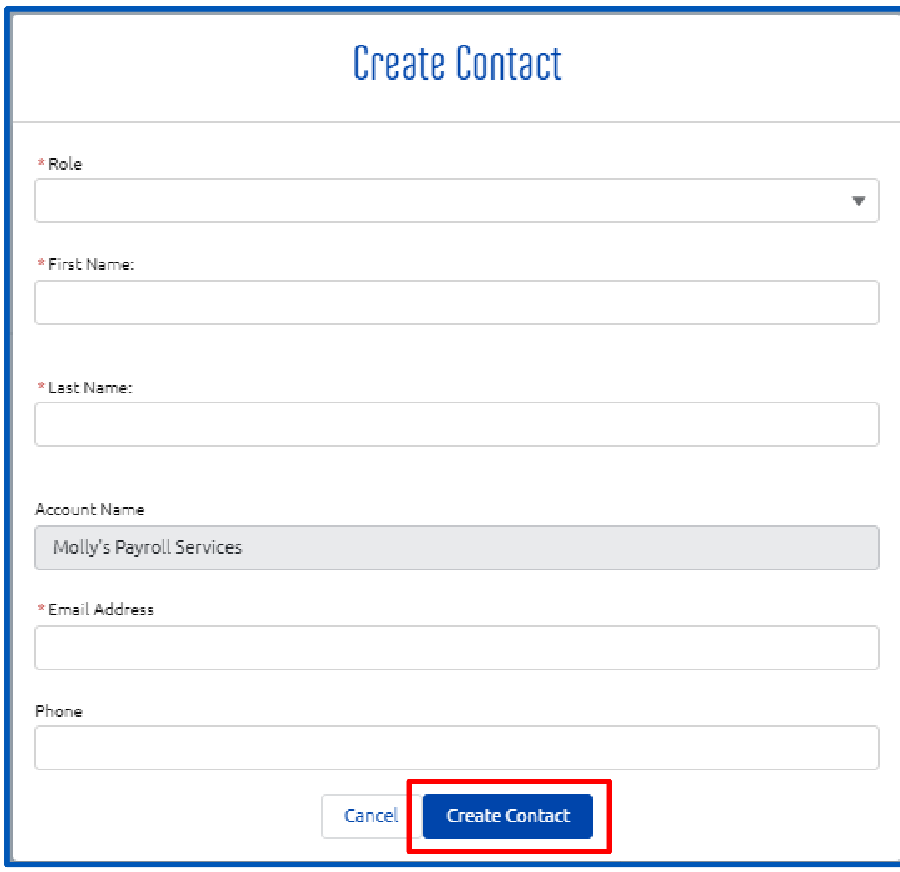
If you applied for a private plan, information about your application's status will appear in the **Private Plan Information** section.

The **Contacts** Tab and Adding a User



The **Contacts** tab displays information about the contacts (i.e. the person who registered the business as well as any other invited users) gathered during the registration process. The contacts in this list have access to this account when they log into ctpaidleave.org.

Additional employees can be added by selecting "**Add User**".



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.

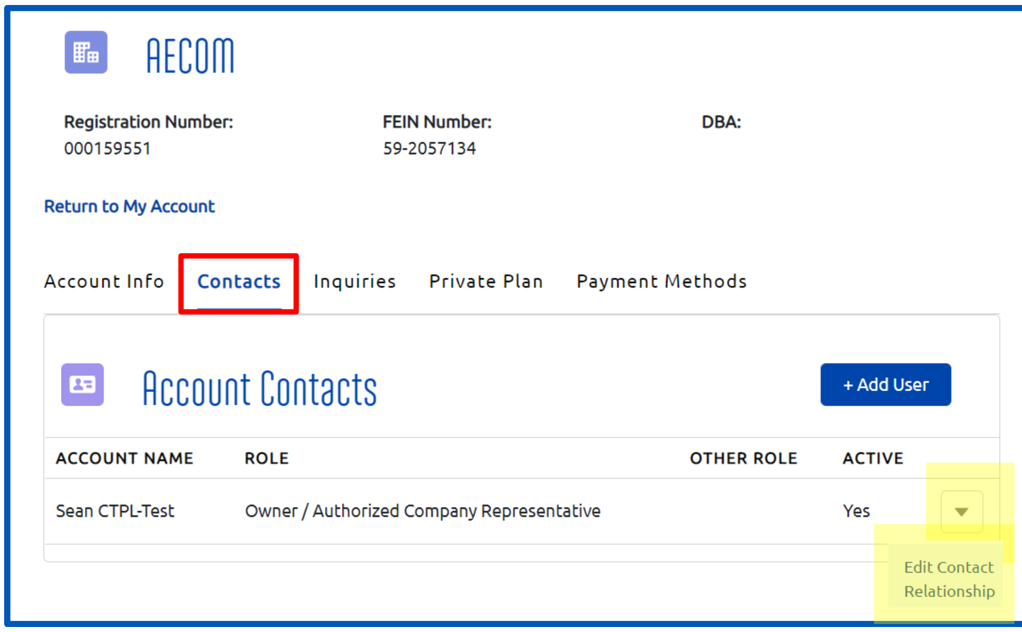
When the new user creates credentials when first signing into ctpaidleave.org, they must use the **same first name, last name, and email address**, or else the system **will not recognize** that they are the same user that you added. You can add new users that already have existing credentials with CTPL,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

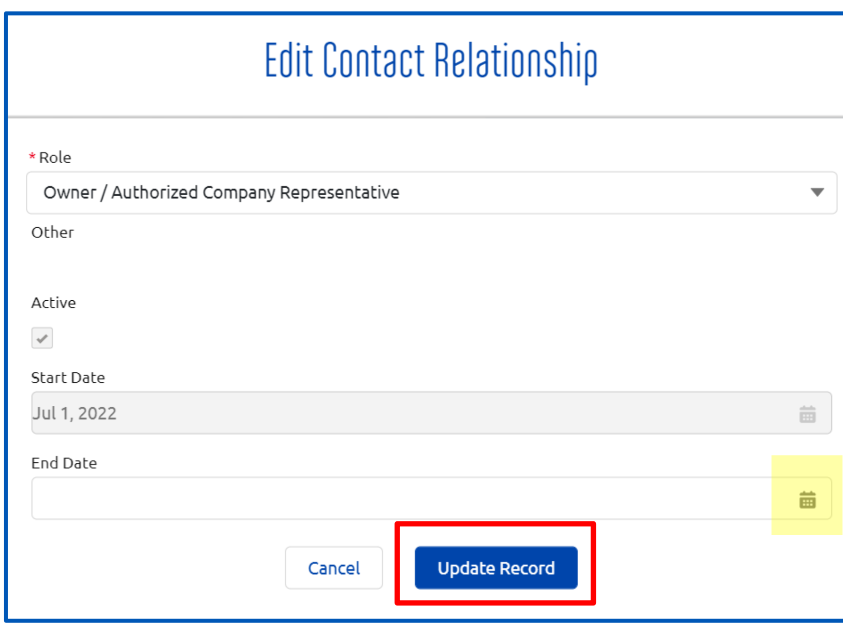
Then, click the **Create Contact** button.



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**.



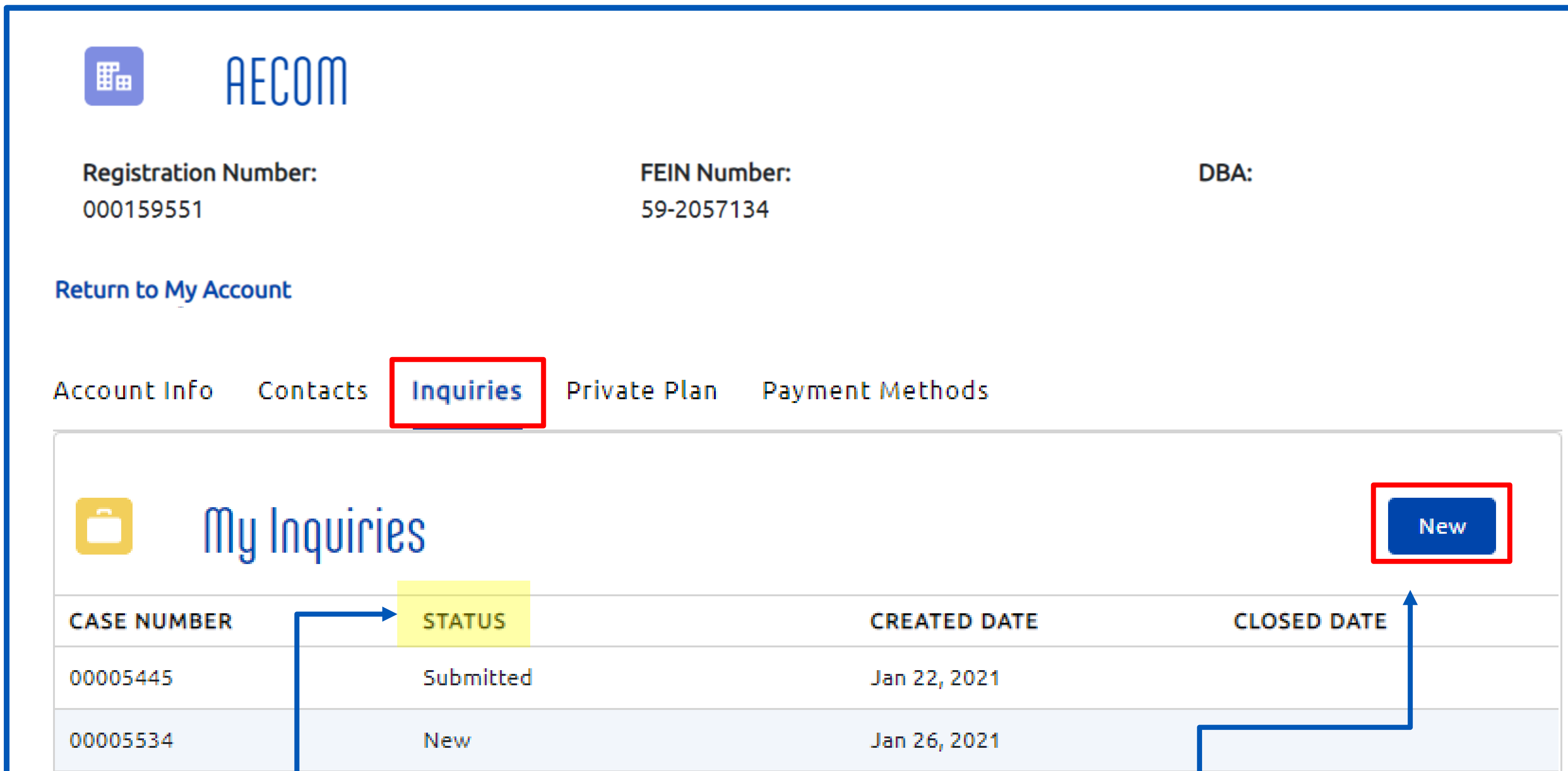
The **Edit Contact Relationship** modal will appear.

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*)

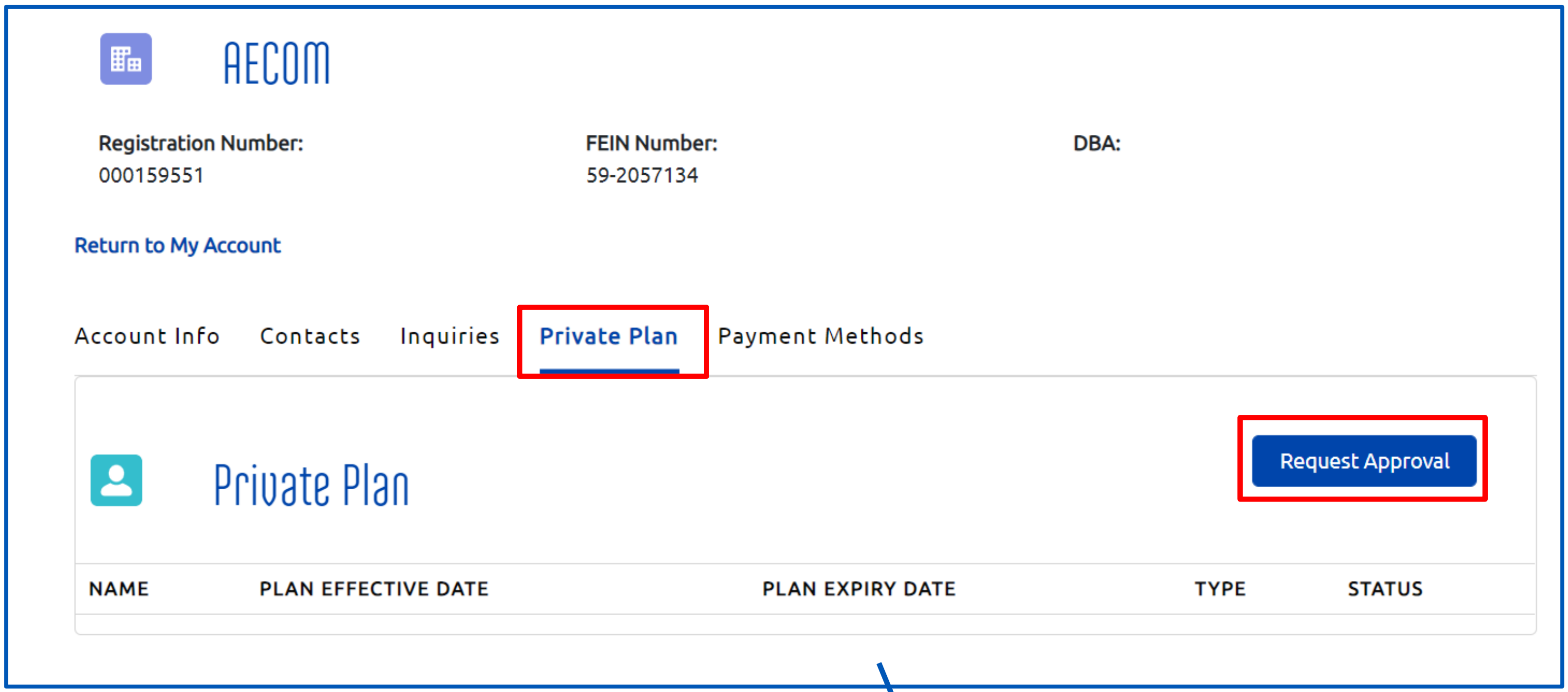
The **Inquiries** tab displays any **Contact Us** submissions associated with the account.

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.

The **Private Plan** Tab

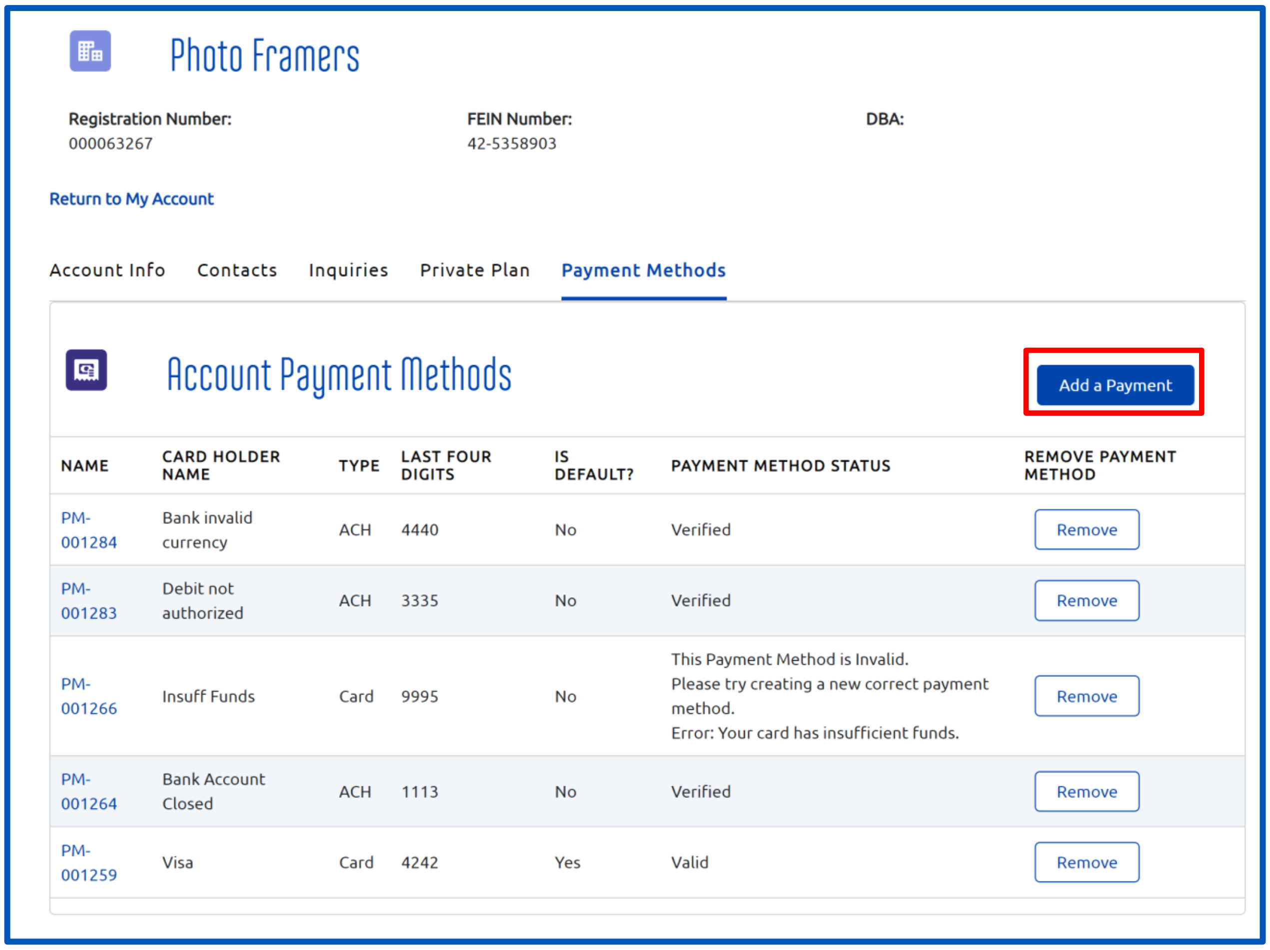


If the TPA / Tax Accountant is a business in the state of CT with one or more employees, they will need to register as a TPA **AND** as an Employer.

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**.

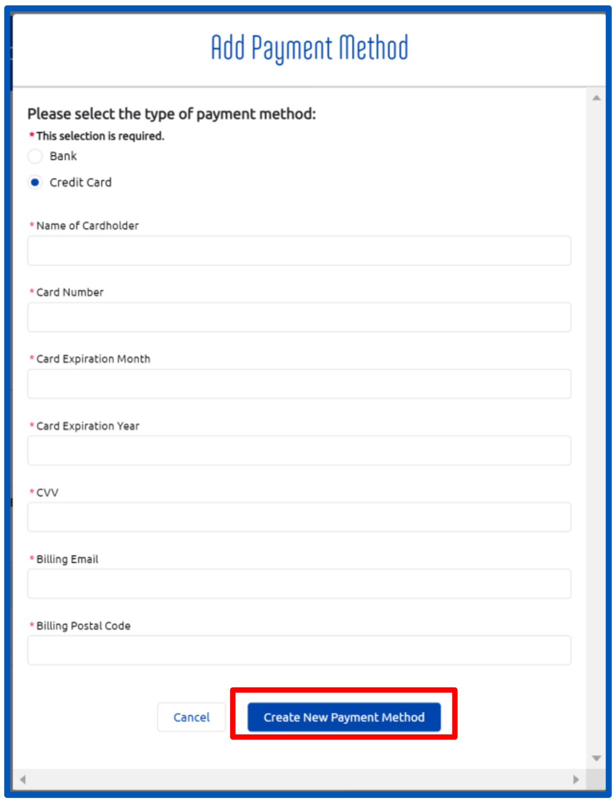
- For a complete step-by-step guide on how to request approval for a Private Plan, review the Apply for a Private Plan checklist on the Register Your Business page.



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	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

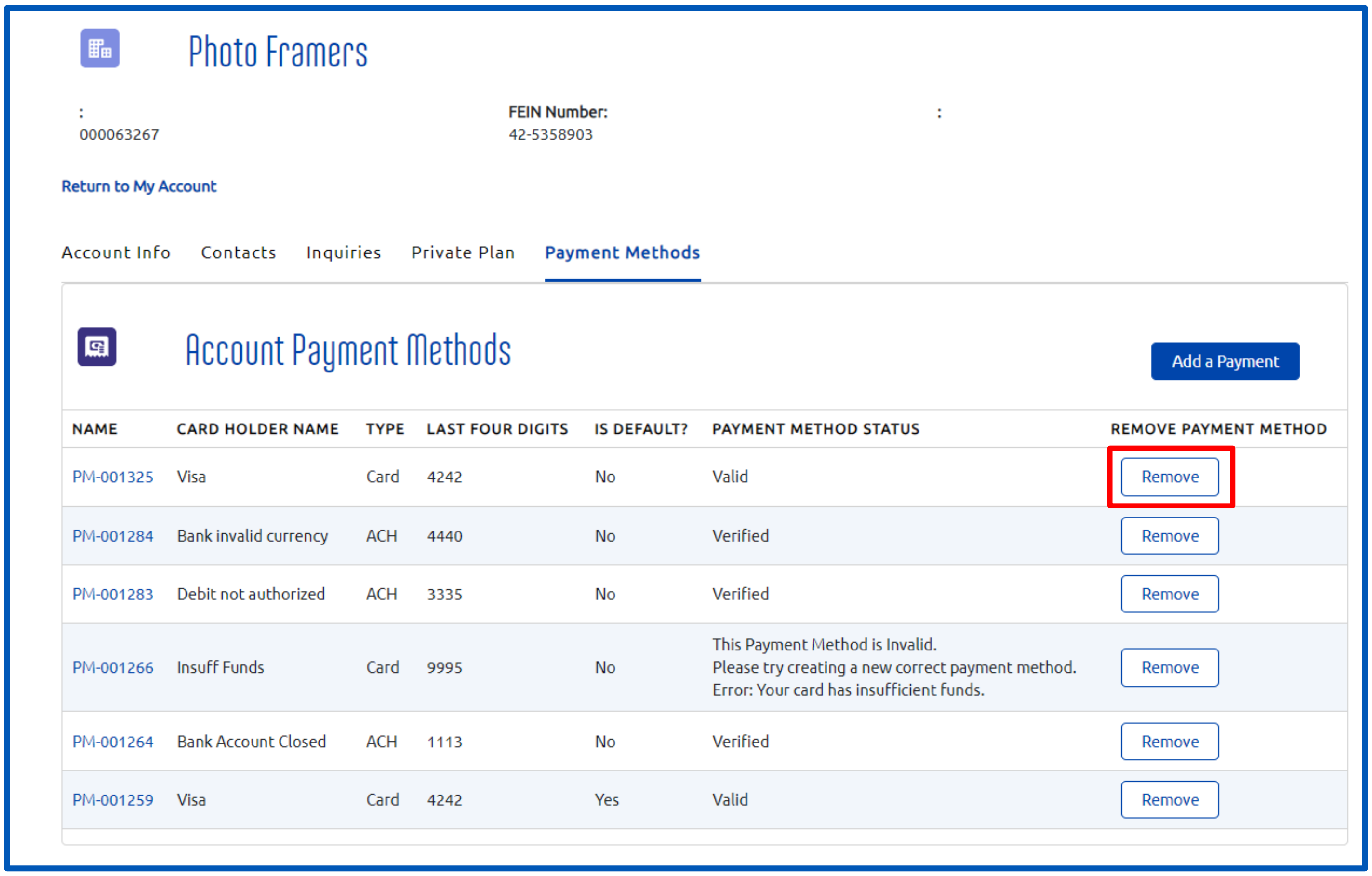
You can add a payment method from your account's **Payment Methods** tab. When you add a payment method here, you will be able to select it and pay with it the next time you process a payment.

- 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.

The **Payment Methods** Tab: Removing a 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**."