

# 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.

## My Account drop-down menu options

	Connecticut Paid Leave		Search		Q Sean CTPL- Test
	Home The Process ~ Register Y	our Business Contact Us	About Us Resources	News Events	My Account CTPL Podcas User Settings
LANGUAGE SE	LECTOR: English Español				Contact Support FAQs
Δ	Are you seeking paid leave benefi	ts because you have been diag	gnosed with or exposed to C	OVID? Read this imp	Sign Out ortant information mac.
	Some employees may find that they over	paid contributions to CT Paid Leav	ve because their combined wag	es from multiple employ	yers exceed the Social Security
history 2. User S 3. Conta 4. FAQs 5. Sign O	count – access information re r, contacts, resources, etc. It D ettings – link to your profile ct Support – link to the Conta – link to the Frequently Asked out – log out of your account.	OES NOT include in on ct.gov. act Us form found on	hformation about the website. the website. From can v • Thi ass loa the em • An the • Vie • Thi spe Pro	the <b>My Accou</b> iew your conta e business <b>Acc</b> sociated with ( d its informati <b>se are busines</b> <b>y Inquiries</b> you e Contact Us for ew and update e CTPL <b>Resour</b> ecific business	Int landing page, you act information and: ount(s) you are click on its name to on). Please note that esses where you are a are NOT your clients a submitted through orm. your Contact Info. rces that apply to your type (Employer, Sole mployed, or TPA/Tax
📼 Se	ean CTPL-Test			Employe	er Resources
Email Address:		Phone: (123) 456-7890		Employer	Payment Guide
Accounts Inqui	ries Contact Info			Employer	Payment Video Guide
					Create .csv Files
	y Accounts				oloyer Toolkit
NAME	FEIN NUMBER	START DATE END DATI	E		loyer Fact Sheet
Sean Tax	59-2057134	2022-06-10	File +		loyee Fact Sheet
Kleenex	54-3405340	2022-05-13	File +		My Account Guide
Sean SP		2022-05-13	File +	Pay My Accou	nt Video Guide for Employers

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

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## 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		🔳 Filing	History				File + Pay
Registration Number:         FEIN Number:           000159551         59-2057134	DBA:	If you do not see	your most recen	t invoice, please	e refresh this p	age.	C Refresh
Return to My Account		NAME	440	NT	FILING PERIOD	FILING PERIOD	PROCESSED
Account Info Contacts Inquiries Private Pla	n Payment Methods		AMOU		START DATE	END DATE	DATE
Account Information	-	INV-00158034	\$0.00		Apr 1, 2022 Apr 1, 2022	Jun 30, 2022 Jun 30, 2022	Jun 14, 2022 May 16, 2022
Account Name	Phone	INV-00157630	\$5.00		Mar 12, 2022	Арг 11, 2022	Apr 11, 2022
Sean Tax			4				
DBA	Business Email						
Federal EIN	Primary Business Activity	💷 Amende	ed Return Refun				
59-2057134	test - batch return registered in terminal			PENDING R	EFUNDS: \$0		
CTPL Registration ID 000159551		amendments. If your	sued automatically sin Returns are complete	and you believe a	refund is owed, ple	ease Contact Us . Ref	unds cannot be
Type Limited Partnership taxed as a C Corporation		applied to future pay	ments. If you are not s	seeing your most re	ecent pending refu	nd request, please r	efresh this page.
Other Business Type		NAME	AMOUNT		ORIG	INAL SACTION STATUS	DATE REFUNDED
				ere are no refund ti			REFUNDED
✓ Business Information							
Opt In Employer	Employee Size Range	💼 Related	Employers				
	10-19	Find A New Employer via F					
NAICS Code 111111	Payroll Frequency Bi-weekly				Search		
TIN	SSN # (Last 4 digits)						
		Find an Existing Employer					
	Payment Remitter						
	A Third-Party Administrator	NAME 🕇	FEIN NUMBER	START DATE	END DATE	ACTIVE	
imes Private Plan Information		AECOM	59-2057134	2022-05-16		Yes	File + Pay
Has Approved Private Plan	Application Decision Date	Wise Solutions	10-0810716	2022-06-15		Yes	File + Pay
Private Plan Application Type	Plan Reason for Denial	Pat's Coffee Shop	12-1234567	2022-06-15		Yes	File + Pay
		Kleenex	54-3405340	2022-06-30	2022-06-30	No	File + Pay
Private Plan Application Status							
✓ Registration Information	. I F	The business (	page has fiv	e main se	ctions:		

Employer Registered Employer Registered Date 6/10/2022 Employer Registrant Name	Professional Employer Organization TPA Registered TPA Registered Date	<ul> <li>Account</li> <li>Contacts</li> <li>Inquiries</li> <li>Private P</li> </ul>
Sean CTPL-Test		• Payment
	TPA Registrant Name	The followin
✓ CT Business Information		as: • The <b>Filing</b>
Business Status	CT Secretary of the State Business ID Nc	Accounta
Business Formed Date		account. I portal and
Date of Discontinuance 🗊		Tax Accou
✓ Address Information		process o
Billing Address	Shipping Address	informatio
696 Jefferson Crescent Burton, CT 40576		<ul> <li>The Amer amended</li> </ul>
John Trumbull		For more • The <b>Relat</b>

Booole

The business page has five main sections:

- Info

- lan
- Methods

ng pages will highlight the tabs listed above, as well

- **g History** box may not be visible in your TPA or Tax nt account, but it will be visible in your client's It is where you can access the secure online payment d view your client's payment information. The <u>TPA &</u> untant Payment Guide can guide you through the of making a payment by clicking **File + Pay**. For more on on the Filing History box, see here.
- nded Return Refunds box displays any outstanding return refunds associated with your client's account. information, see here.
- ted 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.

Private Plan Application Status								
			💷 Ame	ended Return	n Refunds			
arsigma Registration Information					PENDING R	EFUNDS: \$0		
Employer Registered	Professional Employer Organization		Refunds will n	ot be issued auto	matically since y	our Returns mi	ght not be fina	alized and may
Employer Registered Date	TPA Registered		-	onal amendments t Us . Refunds car	-		-	e a refund is owed, not seeing your
6/10/2022				ending refund rec			incs. In you are	not seeing your
Employer Registrant Name Sean CTPL-Test	TPA Registered Date							C' Refresh
	TPA Registrant Name		NAME	AMOUNT		ORIGINAL TRANSACTION	STATUS	DATE REFUNDED
✓ CT Business Information				Ther	e are no refund t		display.	
Business Status	CT Secretary of the State Business ID No							
Business Formed Date								
Date of Discontinuance			🖿 Related	Employers				
			Find A New Employer via F	EIN Number	8	Search		
✓ Address Information								
Billing Address 696 Jefferson Crescent	Shipping Address		Registered Employe	er Results				
Burton, CT 40576		1	Sudoku Link Acc	ounts				
		/	Find an Existing Employer	via Name or FEIN Number				
John Trumbull & 262			Q Search by Name or	FEIN				
3.9			NAME ↑	FEIN NUMBER	START DATE	END DATE	ACTIVE	
Coogla Map data ©2022			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
		1 I/	Kleenex	54-3405340	2022-06-30	2022-06-30	No	File + Pay
To link accounts with you	r clients:							
Enter their FEIN Number	r into the search bar	'						
and click the <b>Search</b> but								
Verify that the name of t								
along with the <b>Link Acc</b> e	ounts button							
<ul> <li>Click Link Accounts</li> <li>The TPA/Tax Accountant</li> </ul>	t will appear in the list		\r					
with the "Active" field di			N	Clicker	- vous alias			hh air
"Start Date" will be toda					n your clier t. From the			
	5				nt terminal			
Once you have linked acco	· •							File + Pay
be able to access their acco					the client			-
payments on behalf of the	m.			Relate	d Employe	e <b>rs</b> box.		
If the "Active" field display	s "No" that means							
that your client has indicate								
longer their TPA or Tax Acc	-							
you will still be able to acce								
make payments on behalf								

#### 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 <u>TPA & Tax Accountant Payment Guide</u>.

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					File +	Pay	
If you do not see your most re	ecent invoice, please refres	h this page	•		C' Ref	resh	
NAME	AMOUNT	FILING P START D		FILING PERIOD END DATE	PROC DATE	ESSED	
INV-00420365	\$0.50	Aug 1, 20	)21	Aug 1, 2021	Jan 19	9, 2022	
INV-00420361	\$0.00	Oct 1, 20	21	Dec 31, 2021	Jan 19	9, 2022	
Pay Period End Date:       2022-04-01       2022-06-30			IAME TR-121631	<b>AMOUNT</b> \$500.00	TRANSACTION STATUS	PAYMENT STATUS Captured	PROCESSED DATE May 17, 2022
Invoice Info Invoice Info Invoice Name INV-00157942 Status Complete Account Lloyd's Coffee Shop Processed Date \$/17/2022 Refunded Date Failed Date Failed Date Calculated Invoice Amount \$500.00 Default Payment Method●	Description 4039: Lloyd's Coffee Shop: 4/1/2022-6/30/2022 CT Employee Count 10 Input Wage for Pay Period S100,000.00 Pay Period Start Date 4/1/2022 Pay Period Start Date 6/30/2022 Reporting Quarter 2 2 Reporting Quarter 2 2 Reporting Year 2022 Amount S500.00 Currency ISO USD Enter a Different Contribution Amount No Override Reason Override Comments CT Gross Wages S100,000.00 Retained Charge Count						
Refunded Charges	Retained Charge Count Retained Charges \$500.00						

Fields are described in further detail on the next page.

## The Invoice

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

💼 Invoice Name:		G	Payment History			
INV-00157942			Fayment motory			
Pay Period Start Date:         Pay Period End Date           2022-04-01         2022-06-30	:	NAME	AMOUNT	TRANSACTION STATUS	PAYMENT STATUS	PROCESSED DATE
		TR-121631	\$500.00	Completed	Captured	May 17, 2022
Return to Account						
Invoice Info		<u>у</u>				
Invoice Name	Description	/				
INV-00157942	4039: Lloyd's Coffee Shop: 4/1/2022- 6/30/2022					
Status Complete	CT Employee Count 10					
Account	Input Wage for Pay Period	_				
Lloyd's Coffee Shop	\$100,000.00	_				
Processed Date 5/17/2022	Pay Period Start Date 4/1/2022	To vi	iew the details	of your cl	lient's	paymen
Refunded Date	Pay Period End Date		on the name o			
Failed Date	6/30/2022 Reporting Quarter					
Talley Date	2	crans	saction begins	WICH IR	•	
	Reporting Year					
Calculated Invoice Amount	2022 Amount	You	will be redirec	ted to the	Pavm	ent
\$500.00	\$500.00				i dynn	CIIC
Default Payment Method	Currency ISO USD	Deta	ils page.			
	Enter a Different Contribution Amount	-				
	No					
	Override Reason					
	Override Comments					
✓ Supporting Documentation						
CT Employee Count for Gross Wages	CT Gross Wages					
4	\$100,000.00					
<ul> <li>Transaction Rollup Summaries</li> </ul>						
Refunded Charge Count	Retained Charge Count 1					
Refunded Charges	Retained Charges \$500.00					

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

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#### Account + Payment Information

	_			
Contact First Name Contact Last Name	Lloyd CTPL-Test		Information taken from t the payment.	he contact record for the individual who submitted
Contact Mailing Street	1 Main St			
Contact Mailing State	СТ		Field Name	Explanation of Value
Contact Mailing City	Hartford		Payment Method Holder's Name	Either the name of the cardholder or the bank account owner
Contact Mailing Postal Code	06103	J	notder straine	
Payment Method Holder's Name	Visa		Account Name	CT Paid Leave account the invoice is connected to.
Account Name	Lloyd's Coffee Shop		Payment Method Last 4	Last four digits of credit card or bank account used in the payment.
Payment Method Last 4 Payment Method Funding	4242 Credit	-	Payment Method Funding	Either Credit or Bank
Brand	Visa		Brand	Either Visa, Mastercard, ACH
Payment Method Brand	Visa		Payment Method Brand	Name of the Banking Institution
Туре			_	
Error Message		J	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.

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.

		PENDING REFU			
		PENDING REF			
nendments	not be issued automatically 5. If your Returns are comple ture payments. If you are no	te and you believe a ref	und is owed, please Conta	act Us . Refund	s cannot be sh this page.
					C <sup>I</sup> Refresh
ME	AN	MOUNT	ORIGINAL TRANSACTION	STATUS	DATE REFUNDED
099413	\$2	2.50	TR-097396	Refunded	May 27, 2022
	Return To Account Transaction Name Transaction Status Payment Status Processed Date Amount Amount Account + Payment Inform	TR-099413 Completed Refunded 4/8/2022, 12:22 PM 2.50			
	Contact First Name Contact Last Name Contact Mailing Street Contact Mailing City Contact Mailing Oity Contact Mailing Postal Code Payment Method Holder's Name				
	Account Name Payment Method Last 4 Payment Method Funding Brand Payment Method Brand	Chargepal			

Some of the fields are left blank on purpose because the original transaction was submitted through the batch process.

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#### The **Account Info** Tab

Coogle

Map data ©2022

_			
💼 AECOM			
-	<b>FEIN Number:</b> 59-2057134	DBA:	
Return to My Account			
Account Info Contacts Inquirie	s Private Plan	Payment Methods	
<ul> <li>Account Information</li> </ul>			
Account Name AECOM		Phone	
DBA		Business Email	
Federal EIN 59-2057134		Primary Business Activity test - batch return registered in terminal	
CTPL Registration ID			
000159551 Туре			
Limited Partnership taxed as a C Corporat Other Business Type	ion 🥒		
✓ 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	
<ul> <li>Private Plan Information</li> </ul>			
Has Approved Private Plan		Application Decision Date	
Private Plan Application Type		Plan Reason for Denial	
Private Plan Application Status			
<ul> <li>Registration Information</li> </ul>			
Employer Registered		Professional Employer Organization	
Employer Registered Date		TPA Registered	. Mar
6/10/2022			
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			
<ul> <li>Address Information</li> </ul>			
Billing Address 696 Jefferson Crescent		Shipping Address	
Burton, CT 40576			
John Trumbull & @@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@			

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
- Туре
- 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

🔳 AECON	ן			
Registration Number 000159551	: FEIN Number: 59-2057134	DBA:		
Return to My Account				
Account Info Cor	ntacts Inquiries Private Plan	Payment Methods		
😐 Accou	nt Contacts		+ Add User	
ACCOUNT NAME	ROLE	OTHER ROLE	ACTIVE	

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**".

	Create Contact
*Role	•
* First Name:	
* Last Name:	
Account Name	
Molly's Payroll Services	
* Email Address	
Phone	
	Cancel Create Contact

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

Registration Number: FEIN Number:	DBA:		
000159551 59-2057134			Removing contacts:
Return to My Account			If an employee leaves the sempany
Account Info <b>Contacts</b> Inquiries Private Plan Payment	Methods		If an employee leaves the company and/or should no longer have access to your account, you can remove them
Account Contacts	+ Add Use		<ul> <li>from the account.</li> <li>Click the dropdown arrow next to that contact record.</li> </ul>
ACCOUNT NAME ROLE	OTHER ROLE ACTIVE		<ul> <li>Select Edit Contact Relationship.</li> </ul>
Sean CTPL-Test Owner / Authorized Company Representative	Yes		
		lit Contact	
	Re	lationship	
		- I	
Edit Contact Relationsh	ip		
	·		
* Role			
Owner / Authorized Company Representative	•	]	
Other			The <b>Edit Contact Relationship</b> modal will appear.
Active			
Start Date			To change the contact's role title,
Jul 1, 2022	Ê		select an alternate title in the <b>Role</b>
End Date			dropdown list.
	<b></b>		To remove the contact from the
Cancel Update Record			account:
	<u>'</u>		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 <b>Update Record</b> button to
			complete the process.
			The "Active" field will now display
			"No," indicating that the contact is no
			longer active. <ul> <li>After the selected End Date has</li> </ul>
			passed, the contact will no longer be
			able to access the account's
			information in My Account when they
			log into the CTPL site.

#### The Inquiries Tab

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.

E AECON	ן		
Registration Number: 000159551		N Number: 2057134	DBA:
Return to My Account			
Account Info Conta	cts <b>Inquiries</b> Private P	Plan Payment Methods	
🗂 My Inqu	Jiries		New
CASE NUMBER	STATUS	CREATED DATE	CLOSED DATE
00005445	Submitted	Jan 22, 2021	
00005534	New	Jan 26, 2021	

#### 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.

Image: ACCOM         Registration Number:       SP2057134         Description       SP2057134         Return to My Account       Account Info       Contacts         Image: Private Plan       Image: Private Plan       Image: Private Plan         Image: Plan EFFECTIVE DATE       PLAN EFFECTIVE DATE       TYPE       STATUS         If the TPA / Tax Accountant is a business:       in the state of CT with one or more       employees, return to the register as a TPA AND as an Employee.         If the TPA / Tax Accountant business:       If the TPA / Tax Accountant business:       in the state of CT with one or more         Image: Plan EFFECTIVE DATE       PLAN EFFECTIVE DATE       TYPE       status         If the TPA / Tax Accountant business:       in the state of CT with one or more       employees, return the CT         If the TPA / Tax Accountant business       wants to request approval from the CT       Paid there 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.       If the Submit.         Image: Click Submit:       Click Submit:       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, theckeklist on the Register Your									
Return to My Account         Account Info       Contacts       Inquiries       Private Plan         Private Plan       Image: Contacts       Image: Contacts       Image: Contacts         NAME       PLAN EFFECTIVE DATE       PLAN EXPIRY DATE       TYPE       STATUS		Registration				r:		DBA:	
Account Info Contacts Inquiries Private Plan Payment Methods  Private Plan Private Plan PLAN EFFECTIVE DATE PLAN EXPIRY DATE TYPE STATUS 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 the chilst on the Register Your		000159551			39-2037134				
Private Plan     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 PT's Plan tab.         Indicate what type of plan you are         requesting approval for         Complete the remainder of the form         and provide the documentation         requestd.         Click Submit.         For a complete step-by-step guide on         how to request approval for a Private         Plan checklist on the Register Your	1	Return to My A	Account						
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								how to request approval for a Priva Plan, review the Apply for a Private Plan checklist on the <u>Register Your</u>	ate e

#### The Payment Methods Tab: Adding a new payment method

CCOUNT Pays Rd Holder Me	quiries MENT TYPE	FEIN Num 42-535890 Private Plan Methods LAST FOUR DIGITS		DBA: Methods	Add a Payment REMOVE PAYMENT METHOD
Contacts Inc CCOUNT Pays RD HOLDER ME	ment	Methods Last four	15		REMOVE PAYMENT
CCOUNT PAU RD HOLDER ME	ment	Methods Last four	15		REMOVE PAYMENT
RD HOLDER ME		LAST FOUR		PAYMENT METHOD STATUS	REMOVE PAYMENT
ME	TYPE			PAYMENT METHOD STATUS	
1. t P. I			DEL AUEL		METHOD
ık invalid rency	ACH	4440	No	Verified	Remove
bit not horized	ACH	3335	No	Verified	Remove
uff Funds	Card	9995	No	This Payment Method is Invalid. Please try creating a new correct payment method. Error: Your card has insufficient funds.	Remove
ık Account sed	ACH	1113	No	Verified	Remove
3	Card	4242	Yes	Valid	Remove
uf nk se	f Funds Account	f Funds Card Account ACH	f Funds Card 9995 Account ACH 1113	f Funds Card 9995 No Account ACH 1113 No	f Funds       Card       9995       No       This Payment Method is Invalid. Please try creating a new correct payment method. Error: Your card has insufficient funds.         Account ed       ACH       1113       No       Verified

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 * This selection is required.	of payment meth	nod:		
<ul> <li>This selection is required.</li> <li>Bank</li> </ul>				
<ul> <li>Credit Card</li> </ul>				
* Name of Cardholder				
* Card Number				
* Card Expiration Month				
* Card Expiration Year				
* CVV				
* Billing Email				
* Billing Postal Code				
	ancel Crea	te New Payment Met	hod	

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

of this document and do not reference the

#### The **Payment Methods** Tab: Removing a payment method

: 000063267			FEIN Num 42-535890		:	
Return to My A	Account					
Account Info	o Contacts Inqui	ries	Private Plan Payr	nent Methods		
<b>E</b>	Account Payn	nent í	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

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."

