

InsurePay®

# Premier Payroll Guide

Policyholder Experience



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# Premier Payroll Overview

InsurePay® Pay-as-you-go Premier Payroll Connections enables policyholders to access many new payroll providers for automated payroll data reporting.

- The policyholder must provide login credentials to their payroll company site.
- Once the policyholder completes the premier payroll registration, payroll will pass from their payroll company to their carrier's pay-as-you-go system.
- This guide documents the experience of the policyholder.
- The generic product brand of InsurePay is used in the document as an example carrier name. When the feature is live for a carrier, policyholders will see the specific brand of the carrier.

# Premier Payroll Connections

- The following is a list of the new Premier Payroll Providers that are now available:
  - Gusto
  - Insperity
  - Justworks
  - Paychex Flex
  - Paycom
  - QuickBooks Payroll
  - Run Powered by ADP
  - Sequoia One
  - Square Payroll
  - TriNet
  - UltiPro (UKG Pro)
  - Wave
  - Zenefits

# Self Registration – Payroll Information

Policyholders associated with carriers that have self-registration will choose their premier payroll company through the self-registration process. (Other carriers have the policyholder select the company in their policy admin system or the admin completes the setup while In Progress.)

Premier Payroll Example 2  
Policy Number: PREM1001 - Effective Date: 05/01/2023

Contact Information   Inclusions/Exclusions   **Payroll Information**   Summary

Payroll Information

\* Payroll Frequency  
Weekly

\* First Check Date in Policy Term  
05/01/2023

Policy Term  
05/01/2023 - 05/01/2024

\* How will you submit your payroll data?  
I will submit my payroll data

A Premier Payroll Example

Another Premier Payroll Company

All Florida Payroll-Daniel Wel

Apex- Express Data Systems, In

APEX-CLA Payroll-20091023

Apex-EAS Corp. dba Plan-It Pay

Select one

Please check this box if your payroll company is not on the above list.

Need Help?  
Feel free to call 857-330-6121 for immediate assistance.  
Quick Help Topics:  
What should I enter for my first check date?  
Which file types can be uploaded?

Continue   Save and Exit

./smartcompDirect/selfreg/payrollInformation.jsp

# Self-Registration - Summary

The Summary page of self-registration shows the payroll provider selected by the user.

**Premier Payroll Example 2**  
Policy Number: PREM1001 - Effective Date: 05/01/2023

Contact Information	Inclusions/Exclusions	Payroll Information	Summary
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### Contact Information

**First Name** Jack  
**Last Name** Thomas  
**Phone** 6175551212  
**Email** cmerullo@insurepay.com

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### Submission Method

**My payroll company will submit my payroll data**

**Payroll Provider** A Premier Payroll Example

**Payroll Frequency** Weekly  
**First Check Date in Policy Term** 05/01/2023

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Click Register to complete your InsurePay account registration. After clicking Register, you will be given a list of next steps based on the information provided during registration.

[Register](#) [Save and Exit](#)

Need Help?

Feel free to call 857-330-6121 for immediate assistance.

# Premier Payroll Registration Tasks

For policyholders that are new to pay-as-you-go, the policyholder will complete a few tasks including adding their payment information to pay their worker's comp premium, entering their credit card information for the premier payroll fee, and providing their payroll company credentials to connect their policy.

## Premier Payroll Demo

### Information

There are registration tasks that require attention before billing can begin.

- Payment information must be entered for the following entities before payroll for them can be processed.

The following business entities are missing payment information:

- Business Entity Premier Payroll Demo - 100 Main Street, Melrose, MA 02176 (Primary Insured).

If you have no authorization, please contact the administrator at 857-330-6121.

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to connect your selected payroll company to your account. The following tasks will need to be completed to access your payroll data through Finch:
  - Enter your credit card information to pay the annual fee of \$240.00 for the service. This fee is collected upfront and is non-refundable.
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your payroll system.
    - Have your login credentials ready to log into your payroll site.

Continue

# Enter Credit Card Information

After the user enters their payment information to pay their worker's comp premium, they will be prompted to enter their credit card information to pay the upfront annual fee for the premier payroll service.

## Payment

EN FR

### Client Information

PolicyID  
WC5934567

First Name: Jack  
Last Name: Thomas

Insured: Premier Payroll Example  
E-mail: cmerullo@insurepay.com

### Mailing Address

110 MAIN STREET

City: EAST COAST  
State: MA  
ZIP: 02145

### Billing Information

Billing Details Same as Client Details  
 Edit Billing Details

First Name: Jack  
Last Name: Thomas

Email: cmerullo@insurepay.com

## Payment

### Mailing Address

110 MAIN STREET

City: EAST COAST  
ZIP: 02145

### Credit Card

Card Number: 4000 0000 0000 0002  
Expiry: 05/25  
CCV: 123

### Payment Details

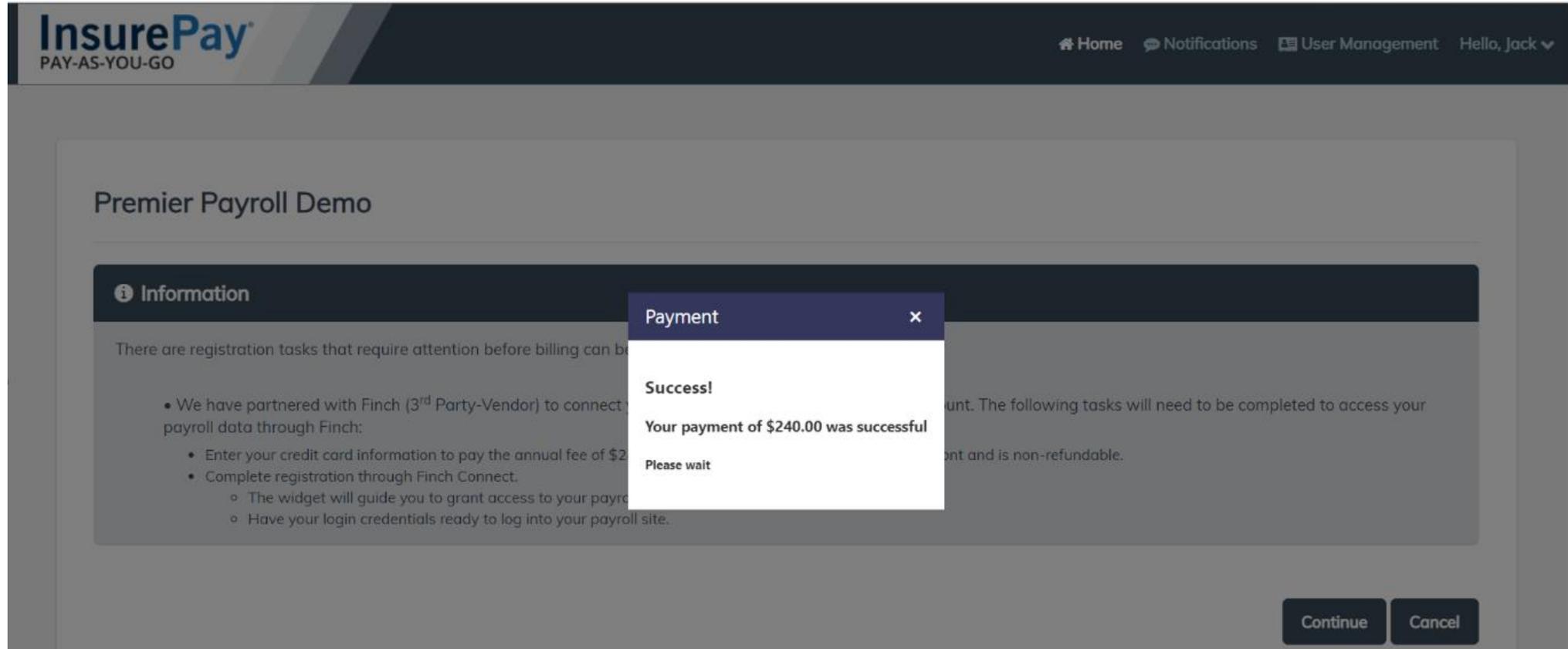
Amount to pay	Total
\$240.00	\$240.00

### Agreements

I authorize the Invoice amount shown under Payment Details to be charged to the card provided above. The amount will appear on my credit card statement as Insurepay.

# Credit Card Payment Success Message

If the policyholder enters their credit card information successfully, they will receive a success message.



# Credit Card Payment Email

In addition to a success message, the person will receive a confirmation of the credit card payment via email.

Credit Card Payment | Premier Payroll Demo

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**Insured:** Premier Payroll Demo

**Customer Id:**

**PolicyID:** PREM1003

**Transaction Date:** 05/17/2023 04:26:59 PM

**Premium Paid:** \$240.00

**Card Type:** 40\*\*\*\*\*0002

**Charge on statement will appear as:** InsurePay - \*\*\*\*\*

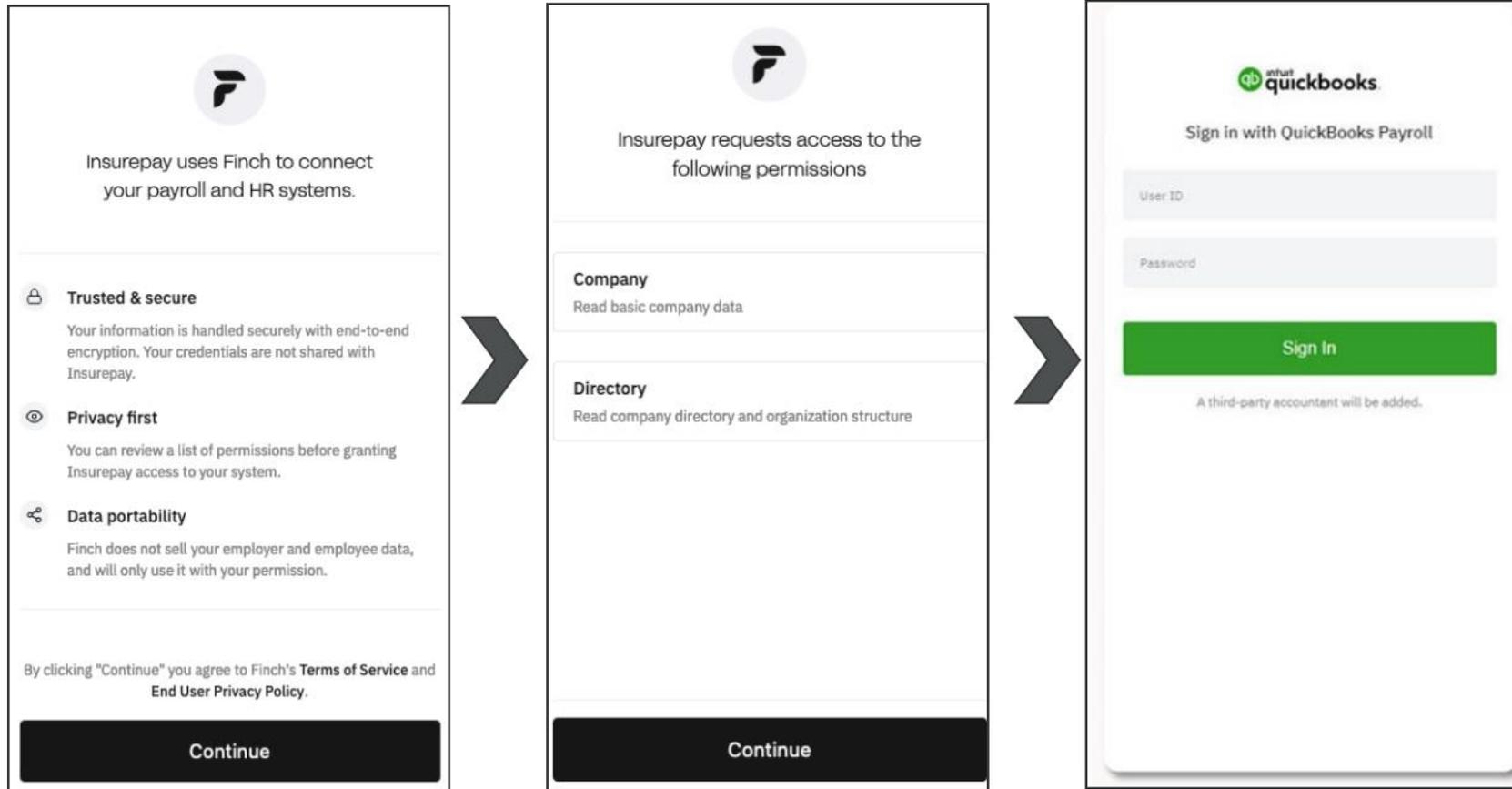
**Total Amount Paid:** \$240.00

**Authorization Code:** 507002

**Transaction Id:** 170523O2D-85430B08-26E2-4904-AD14-E4C0EBC4534A

# Premier Payroll Registration

After the credit card information has been entered, the user will finish the payroll company setup process. The user will continue to the pages below and on the last page enter their username and password to log into their payroll company site.



# Premier Payroll Company Successfully Connected

Once registration is complete the user will receive a message that their payroll provider has been connected to their policy. This message will appear for several second with the tasks and then the page will be refreshed.

## Premier Payroll Demo

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**Success**

Congratulations, you've successfully connected your payroll provider! We'll start working with your payroll provider to have your payroll data sent directly to us.

**Information**

There are registration tasks that require attention before billing can begin.

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to connect your selected payroll company to your account. The following tasks will need to be completed to access your payroll data through Finch:
  - Enter your credit card information to pay the annual fee of \$240.00 for the service. This fee is collected upfront and is non-refundable. (Already Completed)
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your payroll system.
    - Have your login credentials ready to log into your payroll site.

# Payroll from the Payroll Company

Now that the policyholder has connected their payroll company to their policy, payroll will flow seamlessly from the payroll company to the policy.

Premier Payroll Example Policy Number: 04-25114701

Employee Rates

Key Individuals

Policy Rates

**Earned Premium**

Invoices

Payment History

## Earned Premium/Audit

Business Entity

Premier Payroll Example (Primary Insured) - 100 lexington ave suite 350, sunnyvale, CA 94086 ▾

Policy Term

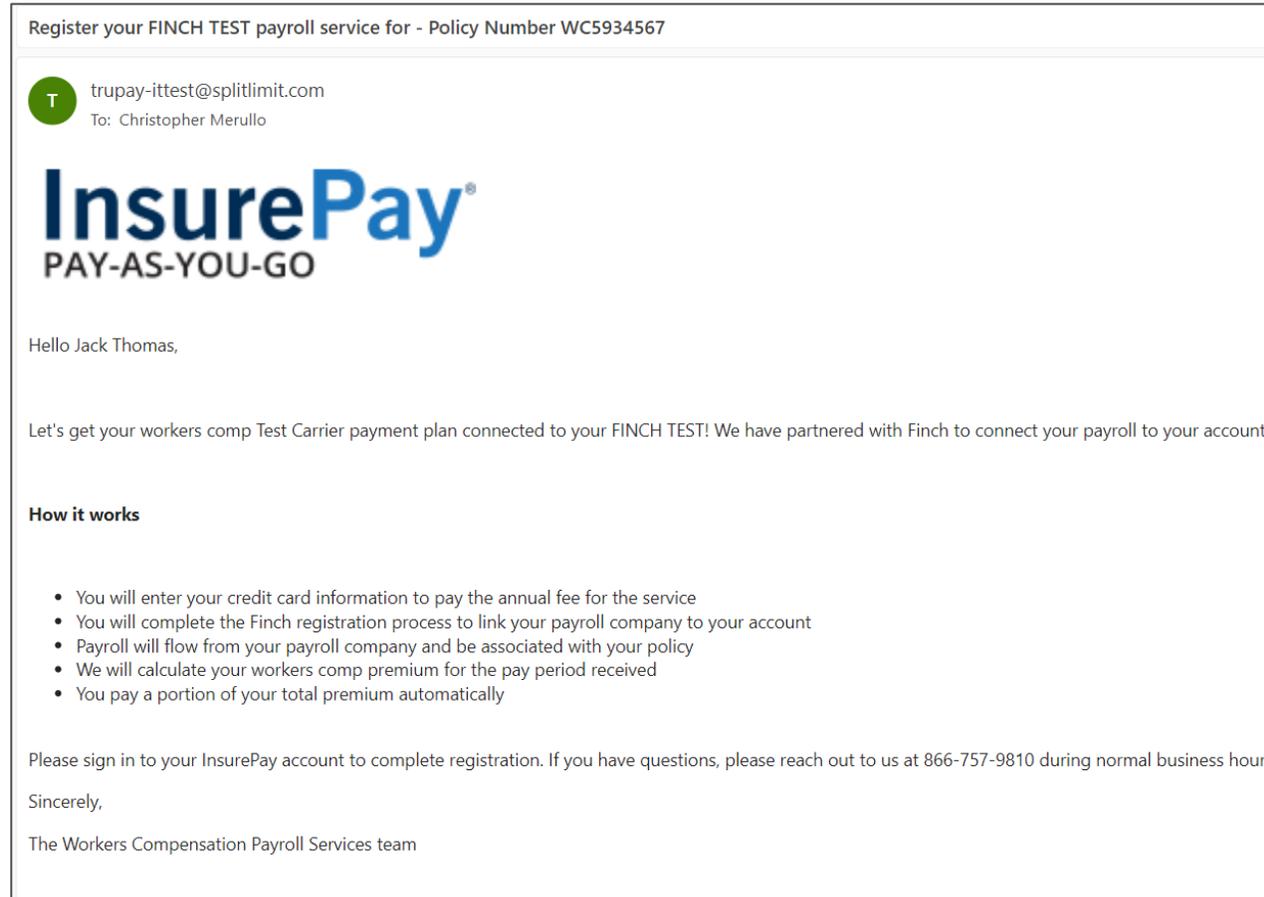
04-25114701 03/26/2023 ▾

Search Download Policy Audit ?

Check Date	Process Date	Description	Amount	Action
05/02/2023	05/02/2023	ExpenseConstant	31.15	N/A
04/14/2023	05/02/2023	Employee Premium	47.12	⬇️

# Switching From Self-Reporting to Premier Payroll

For policyholders that want to switch to their premier payroll company, they will reach out to the carrier administrator to switch their account. The policyholder will receive an email to explain the process and instruct them to log into their account. The carrier admin may send another email if not completed in a timely manner.



# Premier Payroll Registration Tasks

Since the policyholder has already been reporting payroll, there is no task to enter the payment information for the worker's comp premium. The user will click Continue to start the premier payroll registration process.

## Premier Payroll Demo

**i Information**

There are registration tasks that require attention before billing can begin.

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to connect your selected payroll company to your account. The following tasks will need to be completed to access your payroll data through Finch:
  - Enter your credit card information to pay the annual fee of \$240.00 for the service. This fee is collected upfront and is non-refundable.
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your payroll system.
    - Have your login credentials ready to log into your payroll site.

[Continue](#) [Cancel](#)

# Exception Handling

There are a few exceptions that should be noted if the policyholder experiences issues.

- User enters invalid credit card information
- User is unable to register their payroll company
- User decides to cancel out of the registration process
- Interruption in connection to payroll company

# Invalid Credit Card Information

At the time of the credit card payment, if the policyholder puts invalid information for the credit card, they will be warned that there was an error. The user is prompted to retry to enter their information again.

**Premier Payroll Example**

**i Information**

There are registration tasks that require attention before...

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to process payroll data through Finch:
  - Enter your credit card information to pay the amount.
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your account.
    - Have your login credentials ready to log in.

**Finch payment error!**

Please be advised that there was an issue processing your Finch payment for the following reason:  
'1003 - [ELAVON ERROR] - Type: Elavon Payment.  
Message: The Credit Card Number supplied in the authorization request appears to be invalid.'

If you would like to try again, please click on the Retry button, otherwise click Cancel and try again later. If the issue persists, please reach out to your credit card provider.

**Retry** **Cancel**

**Continue** **Cancel**

# Unable to Complete Registration

If the policyholder has issues with registering their payroll company, they will receive a message to try again later.

## Premier Payroll Example 2

**Error**

We were unable to link your payroll company to your account. Please try again later.

**Information**

There are registration tasks that require attention before billing can begin.

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to connect your selected payroll company to your account. The following tasks will need to be completed to access your payroll data through Finch:
  - Enter your credit card information to pay the annual fee of \$240.00 for the service. This fee is collected upfront and is non-refundable. (Already Completed)
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your payroll system.
    - Have your login credentials ready to log into your payroll site.

Continue Cancel

nsured.jsp

# Returning to Register After Already Paying

If the policyholder had issues with registering their payroll company and return to complete registration, they will see that the task about their credit card is already complete. When they click Continue, they will be brought into the payroll company registration process.

## Premier Payroll Example 2

### **i** Information

There are registration tasks that require attention before billing can begin.

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to connect your selected payroll company to your account. The following tasks will need to be completed to access your payroll data through Finch:
  - Enter your credit card information to pay the annual fee of \$240.00 for the service. This fee is collected upfront and is non-refundable. (Already Completed)
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your payroll system.
    - Have your login credentials ready to log into your payroll site.

Continue

Cancel

# Canceling out of the Premier Payroll Process

If a policyholder has not yet completed the tasks to connect their payroll company to their policy, they do have the option to cancel.

## Premier Payroll Demo

**i Information**

There are registration tasks that require attention before billing can begin.  

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to connect your selected payroll company to your account. The following tasks will need to be completed to access your payroll data through Finch:
  - Enter your credit card information to pay the annual fee of \$240.00 for the service. This fee is collected upfront and is non-refundable.
  - Complete registration through Finch Connect.
    - The widget will guide you to grant access to your payroll system.
    - Have your login credentials ready to log into your payroll site.

[Continue](#) [Cancel](#)

# Warning before Canceling

If the policyholder chooses to cancel the premier payroll registration, a warning message will display to ask if they are sure if they want to proceed. If they choose No, they will return to the registration tasks.

The screenshot shows a web interface with a modal dialog box. The background page is titled "Premier Payroll Example" and has an "Information" section with a list of tasks. The dialog box is white with a yellow warning triangle icon and the text "Just Checking...".

**Premier Payroll Example**

**Information**

There are registration tasks that require attention before...

- We have partnered with Finch (3<sup>rd</sup> Party-Vendor) to process payroll data through Finch:
  - Enter your credit card information to pay the ar...
  - Complete registration through Finch Connect.
    - The widget will guide you to grant acces...
    - Have your login credentials ready to log...

...ing tasks will need to be completed to access your... undable.

**Just Checking...**

Your InsurePay payment plan will be set up as a self-administered account. Every pay period, you'll sign into your account to submit your payroll data. Do you want to be set up as a self-administered account?

**Yes** **No**

**Continue** **Cancel**

# Cancel to Self-administered

If the policyholder choose Yes to Cancel, they will receive the following instructions

## Premier Payroll Example

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**i Information**

You have a self-administered InsurePay payment plan.  
Every time you run payroll, sign in to your account to submit your payroll data.  
Click on the **Submit Payroll Data** button to begin.

What would you like to do?

- [Submit Payroll Data](#)
- [Report Zero Payroll](#)
- [View Billing and Policy Info](#)
- [Add/Update Payment Method\(s\)](#)

# Interruption in Connection to Payroll Company

If there is an interruption in the connection with the payroll company, the policyholder will be informed to re-register their account. The policyholder will not have to pay the fee again if it is within the annual fee window. The policyholder will sign in and complete the registration process again.

Subject: Re-Register your [payroll company name] payroll service for [policy number]

Carrier logo

Hello [What do we put here?]

Please be advised that the connection to your payroll company has been interrupted. Please sign in to your [Carrier] account to complete registration again. If you have questions, please reach out to us at [Phone number].

Sincerely  
The [Carrier] team

**InsurePay**<sup>®</sup>



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# Thank you for reviewing the Premier Payroll Guide

Policyholder Guide

For more information about the Beacon Pay As You Go program and Premier Payroll Connections visit [www.beaconmutual.com/PYG](http://www.beaconmutual.com/PYG) or call 401-825-COMP.