

FEDEX MARSH RIGHTSUM® INSURED UI 2020 UPDATES REFERENCE GUIDE

LANDING PAGE

(After clicking the 'Registration Link' in the Registration Email)



Setting up your RightSum® profile is as easy as 1, 2, 3



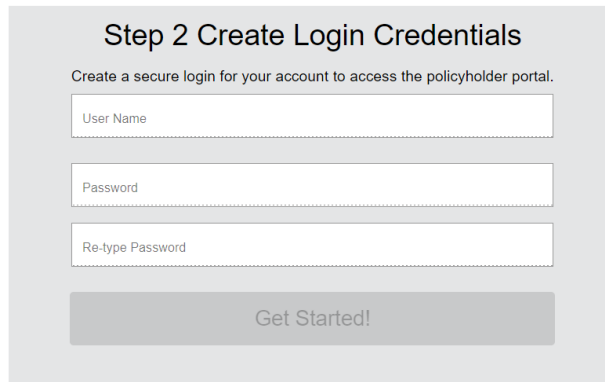
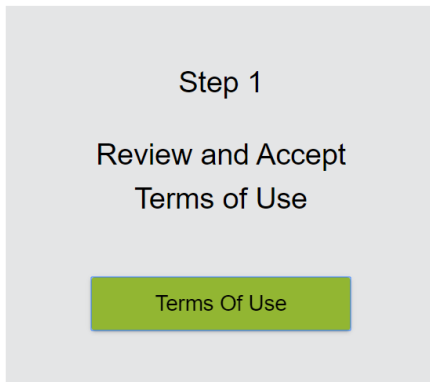
Review and Accept
the Terms of Use



Create Username
and Password

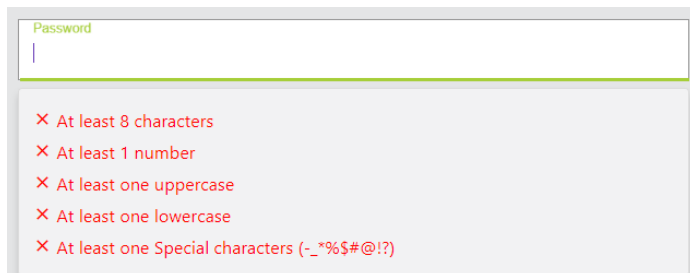


Get
Started!



PASSWORD REQUIREMENTS

(Will appear when they click on the 'Password' field and a green checkmark will appear next to each as they type and use each requirement)



DASHBOARD ONCE LOGGED IN

- **Notices** – Important notifications from InsurePay or Carrier
- **Pending Actions** – Action items the insured must complete before entering payrolls
- **Policies** – The 5 most recent policies will be listed here
- **Payrolls** – The 5 most recent payrolls submitted will be listed here

RIGHTSUM


HOME | BILLING HISTORY

For Help, click [here](#).

For Additional Support, Call: (866) 951-5469 or 



GJ TRUCKING INC.

Dashboard 

Notices

Please review these important notices

Date	Description
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Pending Actions

Please complete any pending actions as soon as possible. Outstanding actions may prevent you from entering payrolls. For more help, please click [here](#).

Description
IW683104 2/1/2019 Complete Employees Setup
IW683104 2/1/2019 Complete Banking Setup

Policies

These are your last five policies. [Click on a policy row to Enter Payrolls](#). For more help, please click [here](#).

Policy Number	Type	Effective	Expiration	Status	Carrier
IW683104	Workers Comp	2/1/2019	2/1/2020	Setup	RIGHTSUM - FEDEX

Payrolls

Below are your most recent payroll entries. [Click on a payroll to see the details for that payroll](#). For more help, please click [here](#).

Policy Number	Begin Date	End Date	Check Date	Payroll	Premium
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PENDING ACTIONS

- Anything listed under this section will need to be completed prior to reporting payrolls, so this is the most important section for insureds to pay attention to.
- Pending Action emails will be sent to the insured as reminders

PENDING ACTIONS - IMMEDIATE ACTION REQUIRED

Thank you for choosing the RIGHTSUM® – Protective Insurance pay-as-you-go premium billing program! Several steps still need to be completed before you can report payroll. Failure to complete these steps may result in cancellation of your RIGHTSUM® – Protective Insurance policy.

Business Name: GJ TRUCKING INC.
Policy Number: IW683104
Effective Date: 02/01/2019
Carrier: PROTECTIVE INSURANCE COMPANY -- FEDEX

Using the userid and password you created previously, please login in to your RIGHTSUM® – Protective Insurance account. The outstanding steps will be displayed in the Pending Actions section on the Dashboard page once you login.

[Click here to complete the pending actions.](#)

Thank you.
RIGHTSUM® – Protective Insurance Support

POLICY SPECIFIC PAGES & MENU

- By clicking on a policy under the 'Policies' section, or when clicking on an item under the 'Pending Actions' section, the insured will be taken to the policy specific page/menu:
- Menu Selections (left hand side of the screen)
 - [Enter Payrolls](#)
 - [View Payroll Reports](#)
 - [Manage Employees](#)
 - [Manage Policy Settings](#)
 - [Manage Notifications](#)
 - [View Messages](#)
 - [View Documents](#)
 - [View Rating Report](#)

ENTER PAYROLLS

- Enter Payrolls, Upload Payrolls or Report Zero Payrolls
- If Zero Payrolls is selected, the insured will select from a drop-down list of reasons (Holidays, Off Season, Vacation, Other). If 'Other' is selected, the insured must type a reason.

GJ TRUCKING INC.
Enter Payroll

[Enter Payrolls](#)
[View Payroll Reports](#)
[Manage Employees](#)
[Manage Policy Settings](#)
[Manage Notifications](#)
[View Messages](#)
[View Documents](#)
[View Rating Report](#)

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

This page is where you will enter or upload payroll. For more help, please click [here](#).

[Upload Payroll](#) [Define Pay Types](#)

Status	Check Date	Gross Pay	
Enter Payroll Zero Payroll	LATE	2/28/2019	\$0.00
	LATE	3/31/2019	\$0.00
	LATE	4/30/2019	\$0.00
	LATE	5/31/2019	\$0.00

- Insured will enter total payroll and then complete the details for each employee based on the pay categories they selected. See '[Define Pay Types](#)' for pay categories that will be shown on this page.

GJ TRUCKING INC.
Enter Payroll

[Enter Payrolls](#)
[View Payroll Reports](#)
[Manage Employees](#)
[Manage Policy Settings](#)
[Manage Notifications](#)
[View Messages](#)
[View Documents](#)
[View Rating Report](#)

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Weekly

Choose a date
4/11/2019

Enter Total Payroll Amount	Difference
\$ 0.00	\$ 0.00

EMP#	FIRST NAME	LAST NAME	CLASS CODE-STATE	SUBTOTAL	WAGE	OVERTIME	TIPS
OFF001	Elaine	Benes	7219-AL	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00
2	GEORGE	COSTANZA	7219-AL	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00
1	COSMO	KRAMER	7219-AL	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00
3	UNCLE	LEO	7219-AL	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00

Save For Later
Submit
Cancel

VIEW PAYROLL REPORTS

- Displays all payrolls completed to-date.

GJ TRUCKING INC. View Payrolls

Enter Payrolls
View Payroll Reports
 Manage Employees
 Manage Policy Settings
 Manage Notifications
 View Messages
 View Documents
 View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

This is a view of all payrolls received to-date.

All By Schedule

Processed Date	EMPS	Check Date	Subject Payroll	Exempt Payroll	Total Payroll	Total Premium	Released	Billed	Reference ID	Last Response	Last Response Code	Completed	Status
1/6/2020	4	2/28/2019	\$0.00	\$0.00	\$0.00	\$0.00	1/6/2020						PendingACH
1/6/2020	4	3/31/2019	\$3,000.00	\$0.00	\$3,000.00	\$219.30							PendingRelease

MANAGE EMPLOYEES

- Verify officers (note that if any changes to the officer(s) need to be made we advise the insured to contact Marsh).
- Add and edit employees or upload employees
- Verbiage about how to classify employees (drivers & helpers vs. clerical) is added to the 'Employees' sub-section (2nd Screenshot)
- During the initial registration, the insured will need to review and confirm all employees via the yellow button below. This button will not appear on this page after the initial review & confirmation.

GJ TRUCKING INC. Employee

Enter Payrolls
 View Payroll Reports
Manage Employees
 Manage Policy Settings
 Manage Notifications
 View Messages
 View Documents
 View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Setup	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

Manage your employees and make sure the correct state and class code is assigned to each employee. For more help, please click [here](#).

Review/Confirm all employee information. Click here when review completed.

Verify Employee(0) Owner/Officer(1) Employees(0) Subcontractors(0) Upload Employee Here

Please verify that each officer of your business is listed below and that the appropriate state and class code is assigned to each officer. This is the information on file with Marsh. Should any changes need to be made, please contact Marsh at 866-814-7515.

New Delete Hide Unhide Include Exclude Show All Employees

<input type="checkbox"/>	Employee#	First Name	Last Name	Employee Type	Class Code-State	Hide	Min	Max	Excl/Incl	Created On
<input type="checkbox"/>	OFF001	Elaine	Benes	Officer	7219 - AL	No	\$44,200.00	\$176,800.00	Included	12/31/2019

Items per page: 10 1 - 1 of 1

Manage your employees and make sure the correct state and class code is assigned to each employee. For more help, please click [here](#).

Verify Employee(0) Owner/Officer(1) Employees(3) Subcontractors(0) Upload Employee Here

Make sure the correct state and class code is assigned to each employee. For drivers and helpers, the Workers Compensation state must be based on the location of the station out of which the employee is dispatched. For clerical employees, the Workers Compensation state is the location of the employees office. If you have any questions, please contact Marsh at 866-814-7515.

New Delete Hide Unhide Show All Employees

<input type="checkbox"/>	Employee#	First Name	Last Name	Employee Type	Class Code-State	Hide	Created On
<input type="checkbox"/>	1	COSMO	KRAMER	Regular	7219 - AL	No	1/6/2020
<input type="checkbox"/>	2	GEORGE	COSTANZA	PartTime	7219 - AL	No	1/6/2020
<input type="checkbox"/>	3	UNCLE	LEO	Seasonal	7219 - AL	No	1/6/2020

Items per page: 10 1 - 3 of 3

MANAGE POLICY SETTINGS

- Here the insured can update how they report payrolls (self-reporting vs. payroll provider), payroll frequency and ACH information.

GJ TRUCKING INC.
Policy Setting

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Weekly

Specify whether you will enter your payrolls directly using this portal (Self-Reporting) or if your payroll company will report your payrolls on your behalf (Payroll Provider). For more help, please click [here](#).

Payroll From: * Self-Reporting [Use Payroll Provider](#)

Create your schedule based on how often you want to report your payroll. For more help, please click [here](#).

Payroll Frequency: Weekly [Edit Schedule](#)

First Check Date: 2/1/2019

Enter the ACH payment information for paying your premiums.

Payment Method: * ACH [Edit Payment Method](#)

Account Holder Name: Elaine Benes

Routing Number: 011175212

Account Number: ****6789

MANAGE NOTIFICATIONS

- Here the insured can assign different individuals (or the same) to receive specific notifications.

GJ TRUCKING INC.
Notification

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

This page allows you to create new recipients and assign who want to receive the various notifications ie. payroll reminders, billing notices, etc. For more help, please click [here](#).

Recipients
Notifications

Notifications
Manage who will receive each type of notification.

Notifications	Email	Text	Action
Bank Return			
Elaine Benes	✓		
Billing			
Elaine Benes	✓		
Employee Classification			
Elaine Benes	✓		
Late Payroll			
Elaine Benes	✓		
Min/Max Premium Adjustment			
Elaine Benes	✓		
Owner Officer Minimum Status			
Elaine Benes	✓		
Payroll Reminder			
Elaine Benes	✓		

VIEW MESSAGES

- This will display any notifications that have been sent to the insured regarding the specific policy (emails and text messages).
- User can search by week, month, quarter or year.

GJ TRUCKING INC. Messages

Enter Payrolls
View Payroll Reports
Manage Employees
Manage Policy Settings
Manage Notifications
View Messages
View Documents
View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

This is a list of notifications that have been sent related to this policy. You can specify a timeframe for the notifications and search for specific words in the notification subject. For more help, please click [here](#).

Week Search in Messages **Search**

Subject	Type	Sent
RIGHTSUM® – Protective Insurance Active Policy Notification	Email	1/6/2020 01:28 PM
RIGHTSUM® – Protective Insurance Pay-As-You-Go Workers Compensation Billing Program - Register Today	Email	1/6/2020 03:11 AM

VIEW DOCUMENTS

- Here the insured can view the documents signed during registration and ACH setup.

GJ TRUCKING INC. Documents

Enter Payrolls
View Payroll Reports
Manage Employees
Manage Policy Settings
Manage Notifications
View Messages
View Documents
View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

This page displays any documents which have been uploaded by your carrier or provided by you.

Document	Description	Type	Check Date
PrivacyNoticeDefault_IW683104_20200103_131144.pdf	Accepted agreement	Agreement	1/3/2020
StandardInsuredACHAgreement_IW683104_20200106_114144.pdf	Accepted agreement	Agreement	1/6/2020
StandardTermsofUse_IW683104_20200103_131145.pdf	Accepted agreement	Agreement	1/3/2020

VIEW RATING REPORT

- This is where the insured can view the state(s), class code(s) and net rate(s) associated with the policy.

GJ TRUCKING INC. Rating

Enter Payrolls
View Payroll Reports
Manage Employees
Manage Policy Settings
Manage Notifications
View Messages
View Documents
View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
26-1336902	IW683104	2/1/2019	2/1/2020	Active	Workers Comp	Self-Reporting	RIGHTSUM - FEDEX	Monthly

This is the rating information for your policy as provided by your insurance carrier.

AL

Class Code	Class Code Description	Estimated Payroll	Base Rate	Base Premium	Net Rate	Net Rate Premium
7219		\$0.00	7.3100	\$0.00	7.3100	\$0.00
TOTAL				\$0.00	\$0.00	\$0.00

Policy Totals: \$0.00

BILLING HISTORY

(Header section, next to RightSum Logo)


- Here the insured can view all billing transactions. By clicking on the reference ID hyperlink, the insured can view the invoice.

RIGH+SUM

HOME

BILLING HISTORY

For Help, click [here](#).

For Additional Support, Call: (866) 951-5469 or 

 elaine

GJ TRUCKING INC.						Billing History
Billing History	This page lists past billing invoices. The most recent invoice is at the top. The reference number is a link which will open a copy of the invoice. For more help, please click here .					
Processed Date	Reference ID	Policy Number	Successful	Amount	Status	
1/7/2020	1969472	IW683104	NO	\$219.30	PENDING	
Items per page: 10					1 - 1 of 1 < >	

STATEMENT

REFERENCE ID:	1969472
STATUS DATE:	1/7/2020
POLICY #:	IW683104
CUSTOMER:	GJ TRUCKING INC. 6133 PIMENTA AVE LAKEWOOD, AL 90712
PHONE:	562-634-4575

DETAIL

POLICY	BEGIN DATE	END DATE	CHECK DATE	PAYROLL	PREMIUM	DESCRIPTION	CHARGE
IW683104	2/1/2019	2/28/2019	2/28/2019	\$0.00	\$0.00	PAYGO	\$0.00
IW683104	3/1/2019	3/31/2019	3/31/2019	\$3,000.00	\$219.30	PAYGO	\$219.30
ADDITIONAL CHARGES:							\$0.00
TOTAL:							\$219.30

SETTINGS PAGE

(Gear symbol top left of page)

COMPANY INFO

- The only fields the insured can edit if they select the “Edit” button are the Contact Info Fields (Name, Email and Phone #'s).
- Note that if any other information needs to be changed, they must contact Marsh.

GJ TRUCKING INC. Company Info

This page reflects the company level information given to us by your insurance carrier. For company related changes (EIN, name, address), please contact Marsh. For more help, please click [here](#).

Company

Name: GJ TRUCKING INC. **EIN:** 26-1336902
DBA: GJ TRUCKING INC. **Legal Entity:** Other
Business Type: All Other

Address

6133 PIMENTA AVE
LAKEWOOD, AL 90712

Contact

Name: Elaine Benes **Phone:** (562) 634-4575
Email: LTAYLOR@PROTECTIVEINSURANCE.COM **Mobile:**

[Edit](#)

MANAGE USERS

GJ TRUCKING INC. Manage Users

This page is where you manage the users who are to be allowed to log in to your policyholder portal. On this page, you can add new users, edit or delete existing users or lock/unlock users. For more help, please click [here](#).

[Add New](#)

Login Name	User Type	First Name	Last Name	Email	Locked Out	Last Login	Created On	Action
elaine	Admin	Elaine	Benes	LTAYLOR@PROTECTIVEINSURANCE.COM	No	1/9/2020	1/3/2020	

DEFINE PAY TYPES

GJ TRUCKING INC. Define PayTypes

This page allows you to customize/select the pay types applicable to your business. The pay types you select will be available when you enter payroll. For more help, please click [here](#).

Annuity Plan

Bonus

Commission

Contribution Retirement

Davis Bacon

Employee Discount

Employee Savings

[Add](#)

[Remove](#)

Overtime

Tips

Wages

- All available Pay Types

- | | | |
|-------------------------|------------------|--------------------|
| Annuity Plan | Gift Equitant | Section 125 |
| Bonus | Holiday | Severance |
| Commission | Housing | Shift Differential |
| Contribution Retirement | Incentive Plan | Sick |
| Davis Bacon | Jury Duty | Sick TPA |
| Employee Discount | Meal Overtime | Stock Purchase |
| Employee Savings | Meal Regular | Third Party Trust |
| Employer Cafeteria | Military Pay | Tool Allowance |
| Employer Compensation | Pension | Travel Time |
| Expense Business | Piecework | Uniform Reimburse |
| Expense Non-Business | Profit Sharing | Vacation |
| Fringe Benefit | Salary Reduction | |