


New Portal Introduction

Welcome to the new version of the PolicyHolder Portal. There are many new enhancements to this version. The new Dashboard is your home base and this New Portal Introduction will show you how to get to where you need to go.

Please note that throughout the Portal, there are links to the full Help Document for more in depth directions. You can click the words 'Need Help?' or 'Help?' at the top of any of the pages in the application or anywhere that you find the question mark icon , you can click on it and you will be directed to a section of the Help Document to answer your questions.

Welcome to your new Dashboard. Click on a policy to show your new Navigation Menu. From there you can gain access to Enter Payrolls as well as several other functions.

New

Notices

1005 - Important notices from your carrier or concerning the system will appear here.

Date	Description
------	-------------

Pending Actions

1006 - These actions must be completed to ensure successful processing of your payrolls.

Description

Policies

1007 - These are your last five policies.

Policy Number	Type	Effective	Expiration	Status	Carrier
PN919919	Workers Comp	8/31/2018	12/15/2019	Active	YOUR CARRIER
PN919919	Workers Comp	7/2/2018	7/2/2019	Setup Cancelled	YOUR CARRIER

Payrolls

1008 - These are the five most recent payrolls



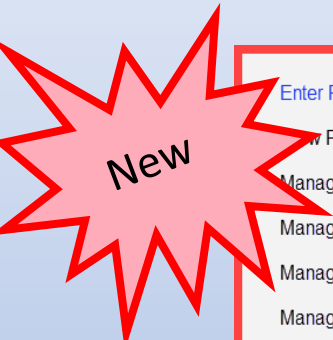
Clicking on a policy will take you to the Enter Payroll page and show you the new Navigation Menu.



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

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	Self-Reporting Self-Reporting	YOUR CARRIER	BiWeekly
					Upload Payroll			
					Enter Payroll	Zero Payroll		
					Status	Check Date	Gross Pay	
					LATE	7/5/2019	\$1,296.30	
					LATE	7/19/2019	\$1,296.30	
					LATE	8/2/2019	\$1,296.30	
					LATE	8/16/2019	\$1,296.30	
					LATE	8/30/2019	\$1,296.30	

On the Enter Payrolls page, you will be able to Upload Payroll using a template excel file if you choose to do them all at once. Or, you can click the Enter Payroll link and enter the payrolls individually. You can also enter a Zero Payroll by clicking that link. These can all be done on this page.



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

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency	
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	Self-Reporting Self-Reporting	YOUR CARRIER	BiWeekly	
						Upload Payroll	Define PayType		
						Status	Check Date	Gross Pay	
						Enter Payroll	Zero Payroll		
						LATE	7/5/2019	\$1,296.30	
						LATE	7/19/2019	\$1,296.30	
						LATE	8/2/2019	\$1,296.30	
						LATE	8/16/2019	\$1,296.30	
						LATE	8/30/2019	\$1,296.30	

There is a link on this page for Define PayType. If you click on this link, you will open a screen where you can select only the pay types for which you will be entering payroll to appear on your Enter Payroll screen. You can remove any of those pay types that you do not want to be shown on your Enter Payroll as well.

New

[Enter Payroll](#)

[View Payroll Reports](#)

[Manage Employees](#)

[Manage Policy Settings](#)

[Manage Notifications](#)

[Manage Seasonal Shutdown](#)

[View Messages](#)

[View Documents](#)

[View Rating Report](#)

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	Self-Reporting Self-Reporting	YOUR CARRIER	BiWeekly

[Upload Payroll](#)

[Define PayType](#)

Status	Check Date	Gross Pay
Enter Payroll Zero Payroll		
LATE	7/5/2019	\$1,296.30
LATE	7/19/2019	\$1,296.30
LATE	8/2/2019	\$1,296.30
LATE	8/16/2019	\$1,296.30
LATE	8/30/2019	\$1,296.30

You can add or remove pay types to customize your Enter Payroll screen.



Define PayTypes ≡

Annuity Plan	<p>Add ▶</p> <p>◀ Remove</p>	Bonus
Commission		Overtime
Contribution Retirement		Sick
Davis Bacon		Vacation
Employee Discount		Wages
Employee Savings		
Employer Cafeteria		
Employer Compensation		
Expense Business		
Expense Non-Business		
Fringe Benefit		
Gift Equivalent		
Holiday		
Housing		
Incentive Plan		
Insurance Pension		

You also have access to select Manage Employees from the Navigation Menu.

Enter Payroll
View Payroll Reports
Manage Employees ←
Manage Policy Settings
Manage Notifications
Manage Seasonal Shutdown
View Messages
View Documents
View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

1018 - Manage your employees and make sure the correct class code is assigned to each employee.

Verify Employee(0) **Owner/Officer(0)** Employees(13) Subcontractors(0) [Upload Employee Here](#)

1020 - Make sure the correct class code is assigned to each owner/officer. The setting of Included or Excluded is very important. To Exclude an Owner/Officer, you must receive approval from your carrier. If you have any doubts on how to set your Owner/Officers please contact your Agent or Carrier.

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 ↑
--------------------------	-----------	------------	-----------	---------------	------------------	------	-----	-----	-----------	--------------

Items per page: 10 0 of 0 < >

On the Manage Employees page, you will be able to Upload Employees using a template file if you choose to add them all at once. Or, you can click the New button and enter each employee individually. You can also Delete, Hide or Unhide employees from this page as well.

Enter Payroll

View Payroll Reports

[Manage Employees](#)

Manage Policy Settings

Manage Notifications

Manage Seasonal Shutdown

View Messages

View Documents

View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

1018 - Manage your employees and make sure the correct class code is assigned to each employee.

Verify Employee(0) Owner/Officer(0) Employees(13) Subcontractors(0)

[Upload Employee Here](#)

1020 - Make sure the correct class code is assigned to each owner/officer. The setting of Included or Excluded is very important. To Exclude an Owner/Officer, you must receive approval from your carrier. If you have any doubts on how to set your Owner/Officers please contact your Agent or Carrier.

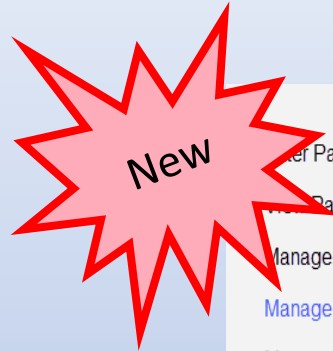
[New](#) [Delete](#) [Hide](#) [Unhide](#) [Include](#) [Exclude](#) Show All Employees

Search

<input type="checkbox"/>	Employee#	First Name	Last Name	Employee Type	Class Code-State	Hide	Min	Max	Excl/Incl	Created On ↑
--------------------------	-----------	------------	-----------	---------------	------------------	------	-----	-----	-----------	--------------

Items per page: 10 0 of 0 < >

Some of the new self-service functions available in the new portal include access to Manage Policy Settings as follows:



- View Payroll
- View Payroll Reports
- Manage Employees
- Manage Policy Settings**
- Manage Notifications
- Manage Seasonal Shutdown
- View Messages
- View Documents
- View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

1009 - 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).

Payroll From: * 2.7 PAYROLL FILE 13 COLUMNS
FORMAT Self-Reporting

[Use Payroll Provider](#)

1010 - Create a schedule for when your payrolls will be due.

Payroll Frequency: Weekly

[Edit Schedule](#)

First Check Date: 10/1/2019

1011 - Specify the details for how you will be paying your premium.

Payment Method: * ACH

Account Holder Name: ARUL

Routing Number: 063100277

Account Number: *****2312

[Edit Payment Method](#)

If you click on Use Payroll Provider, you can search and select a Payroll Provider or request one to be setup, or you can choose Self-Reporting. Under Edit Schedule, you can set up how often your payroll is run. And lastly, under Edit Payment Method, you can set up your ACH payments.



Use
Payroll
Provider

Payroll Provider search *

USB

Select	Status	Payroll Name	DBA	City	State	Phone
<input type="radio"/>	Approved	MASTERPAY USA LLC	DoingBusinessAs002151	FORT MYERS	FL	(800) 000-4348
<input type="radio"/>	Approved	MEGAPAY USA	DoingBusinessAs002151	SPRING VALLEY	NY	(800) 002-1812
<input type="radio"/>	Approved	PAY USA	DoingBusinessAs002151	KING OF PRUSSIA	PA	(800) 001-0957
<input type="radio"/>	Approved	PAYOUT USA INC	DoingBusinessAs002151	TALLAHASSEE	FL	(800) 000-5100
<input type="radio"/>	Approved	PAYSOURCE USA	DoingBusinessAs002151	DAYTON	OH	(800) 002-2023

Items per page: 20 1 - 10 of 10 < >

If still not found please [click here](#).

Edit
Schedule

How often do you run payroll? Weekly Bi-Weekly Semi-Monthly Monthly

When was your last payroll date?
9/30/2019

Cycle	Check Date	Estimated Premium	Estimated Payroll
1	8/31/2018	\$777.78	\$3.73
2	9/14/2018	\$777.78	\$3.73
3	9/29/2018	\$777.78	\$3.73

Edit
Payment
Method

Payment Method
ACH

1012 - Your premium will be debited using the following account.

Account Holder Name:
ARUL

Routing Number:
063100277

Account Number:
12312312312

Account Number (File Type):
12312312312

Another important change in this new version of the Portal is the access to Manage Notifications on the Navigation Menu.

On this page, you can add/edit/delete the folks who you want to receive Notifications.



Navigation Menu:

- Enter Payroll
- View Payroll Reports
- Manage Employees
- Manage Policy Settings
- Manage Notifications** ←
- Manage Seasonal Shutdown
- View Messages
- View Documents
- View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

Recipients Notifications

Recipients
1017 - Manage the list of people who can receive notifications.

Name	Email	Mobile	Action
ARUL-1	ATIPPABATUNI@CTSHOLDINGS.COM		
Jack Sprat	jsprat@yahoo.com	(888) 888-8888	
Tami Twotone	tt54@gmail.com	(777) 777-7777	
Thomas Kinkade	tkinkade@aol	(999) 999-9999	

[Add New Recipient](#)

On this page, you can add/edit/delete the recipients to the Notifications to make sure they receive the correct correspondence.



Management menu items:

- Internet Payroll
- View Payroll Reports
- Manage Employees
- Manage Policy Settings
- Manage Notifications**
- Manage Seasonal Shutdown
- View Messages
- View Documents
- View Rating Report

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

Recipients

Notifications

1016 - Manage who will receive each notification.

Notifications	Email	Text	Action
Bank Return ⓘ			+
ARUL-1	✓		✎ 🗑
Jack Sprat	✓	✓	✎ 🗑
Billing ⓘ			+
ARUL-1	✓		✎ 🗑
Employee Classification ⓘ			+
ARUL-1	✓		✎ 🗑

Windows taskbar: employees (11).xls, License Key.txt, Acrobat_2017_We...exe, License Key.txt, AcrobatPro_11_We...exe, Show all

Other available options include Manage Seasonal Shutdown, View Messages, View Documents and View Rating Reports

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

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

Recipients **Notifications**

1016 - Manage who will receive each notification.

Notifications	Email	Text	Action
Bank Return			+
ARUL-1	✓		✎ 🗑
Jack Sprat	✓	✓	✎ 🗑
Billing			+
ARUL-1	✓		✎ 🗑
Employee Classification			+
ARUL-1	✓		✎ 🗑

employees (11).xls | License Key.txt | Acrobat_2017_We...exe | License Key.txt | AcrobatPro_11_We...exe | Show all

These are options from the Navigation Menu for you to view and in some cases update.

Seasonal Shutdown

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

1023 - Enter the begin date, end date and reason for each shutdown period. Note that zero payrolls will automatically be generated for you during the shutdown periods.

Shutdown Start Date	Shutdown End Date	Shutdown Reason	Actions
No record found.			

[Add Seasonal Dates](#)

Messages

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

Week Filter [Search](#)

Subject	Type	Sent
No messages found.		

Items per page: 10 0 of 0 < >

Documents

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

Document	Description	Type	Check Date
Agreement_PN919919_090624.pdf	Agreement from Registration	Agreement	8/30/2018

Rating

EIN	Policy Number	Effective	Expiration	Status	Type	Payroll	Carrier	Frequency
91-9919919	PN919919	8/31/2018	12/15/2019	Active	Workers Comp	2.7 PAYROLL FILE 13 COLUMNS FORMAT	YOUR CARRIER	Weekly

Class Code	Class Code Description	Estimated Payroll	Base Rate	Base Premium	Net Rate	Net Rate Premium
8810	CLERICAL	\$35,000.00	0.4800	\$168.00	0.4800	\$168.00
		\$35,000.00		\$168.00		\$168.00
EXPENSE CONSTANT					\$0.00	
TOTAL					\$168.00	\$168.00

Policy Totals: \$168.00

Enjoy your new version of the portal.

Thank you!