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 ⑦, 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.
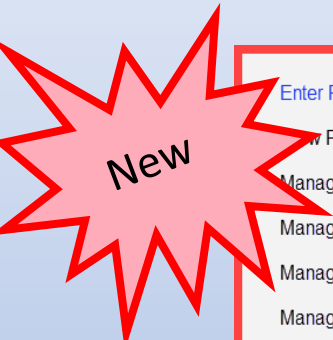
Clicking on a policy will take you to the Enter Payroll page and show you the new Navigation Menu.

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

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.

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	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.

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	LATE	8/30/2019	$1,296.30

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

New

Define PayTypes

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

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

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.

At the top of all the portal screens, there is a Gear icon ⚙ and if you click it, you will obtain access to the Admin Menu page which allows you to perform the following actions:

- **Company Info** – update Company Contact information
- **Manage Users** – Several maintenance actions can be performed under this menu including setting up new users, editing existing users, locking or unlocking users, resetting passwords or deleting users
- **Define PayTypes** – this menu allows you to customize your Enter Payroll screen by selecting the Pay Types that will appear there – this is the same screen you have access to under Enter Payroll

Company Info

Manage Users

Define PayTypes

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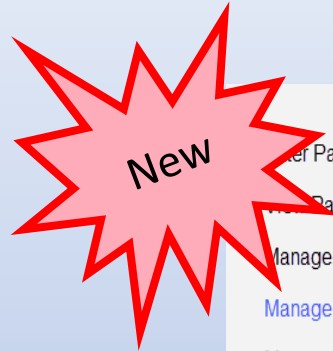
New

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

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

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 **Edit Payment Method**

Account Number: *******2312

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.

New

Use Payroll Provider

Edit Schedule

Edit Payment Method

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.

New

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Navigation Menu:
- ...ter Payroll
- View Payroll Reports
- Manage Employees
- Manage Policy Settings
- Manage Notifications
- Manage Seasonal Shutdown
- View Messages
- View Documents
- View Rating Report

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.

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

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

Enjoy your new version of the portal.

Thank you!