Paylogix® Case Set Up

Procedures

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*The following information is provided as a guideline for use in setting up a case to utilize the Paylogix® **Premium Solutions®** Single Point Billing® services.* *[CaseSetUpProcedures - 032404]*

Single Point Billing®

Single Point Billing® involves the consolidation of multiple products from (potentially) multiple providers onto a single bill. It subsequently involves the receipt, reconciliation and break-out of the collected consolidated premiums by Paylogix®, with ensuing remittance to the respective providers. SPB offers the employer relief from the administrative burdens incurred with handling the deductions and bills for multiple benefit programs. A single payroll deduction can be made for each employee for any number of benefit programs. A single remittance can be made by the employer for any number of employees, and for any number of insurance providers.

In order to set up the case so that the billing works smoothly, it is necessary to collect some important information from the employer prior to enrollment. It is also very important that the employer understand exactly how the process will work, and what their responsibilities will be on an ongoing basis. While Single Point Billing® really does greatly simplify the premium collection process, there are some steps that must still be followed by the employer to make everything work.

Step One: Get Paylogix® Involved Early

The sooner we are aware that you are working on a new case, the better we will be able to assist you in setting it up. Call to have an Account Specialist assigned as soon as you are aware of a new prospect, and discuss any unusual aspects of the group, or special assistance that may be required.

Step Two: Completing The Client Data Form

Knowing how the employer's payroll operates is key to proper case set-up. We need to understand how often their employees are paid, how many payroll centers they use, whether or not the payroll is year-round, etc. We also need to find out how the employer wants to be billed (electronic, internet, paper bill, etc.), and how they intend to make their payments (electronic funds transfer, paper check, etc.) This information is gathered using the Paylogix® Single Point Billing® Client Data Form (copy attached).

You should review this form carefully and understand what each item means before meeting with the employer's payroll department. If you have any questions, call Paylogix® at 1-800-622-4131 before meeting with payroll.

1. Frequently Asked Questions

A list of the most frequently asked questions (FAQs) relative to Single Point Billing® has been put together, to help respond to employer inquiries. A copy is attached. Please review this prior to your meeting with payroll.

A similar list of FAQs about how the Payroll Interface works is also attached. You should be familiar with these questions, as well.

2. Employer Advantages

Even though the employer has probably already been "sold" on using Single Point Billing® at this point, you may want to reinforce some of the real advantages they will enjoy through the Paylogix® system. A list of the key advantages for employers is attached for reference.

Step Three: Meeting With Payroll

After familiarizing yourself with the above items, schedule your meeting with the person responsible for managing the bill at the client company. Complete the Client Data Form, and fax it to Paylogix® at 516-408-7100.

1. Conquering the "Fear Factor"

Some people are hesitant about using a new technology at first, either because it is "different" than what they are used to, or they are just not comfortable with computers and unknown systems. Demonstrating how the Paylogix® system works is an important first step in overcoming this hesitancy and making them comfortable with the new procedures. There are several ways we can assist you:

1a. Call the Account Specialist that has been assigned for the case, and introduce them to your payroll contact. Our specialists are highly trained to help your clients become comfortable with the process, and to answer any questions they may have.

1b. Schedule an online "Web Demo". We have the capability to demonstrate the system live right to the client's computer. All that is required is that their computer have internet access, and we can lead a step-by-step demonstration of the system capabilities and procedures to be followed.

1c. Remind your contact that hard-copy backup is always available. They can print out a paper copy of their bill, or any system report, at any time.

2. Obtaining Existing Coverage Documentation

If there are existing programs that will be included in the bill going forward, we will need to obtain a copy of their current bill for each such program, so that it can be entered into our system.

3. Verify Policy and Coverage Dating

The complete policy dating schedule for the enrollment should be verified prior to beginning the enrollment. Items to verify include:

3a. Enrollment Start Date
3b. First Payroll Deduction Date
3c. Policy Effective Date
3d. Enrollment End Date

It is very important that deductions begin on time, to ensure that the employer has enough time to collect the full first month premium prior to the due date. You will need to verify how much lead time the employer needs to initialize deductions on their payroll system once they are notified of the proper amounts in developing the above date schedule.

Step Four: Conduct The Enrollment

Set up the enrollment according to the established schedule to add new coverages and programs for the employer. The original enrollment documents (applications, etc.) should be sent to the carrier providing the coverage, with a summary of the enrollment results including the modal premiums to be deducted for each coverage sent to Paylogix®. [Note: An electronic data file (spreadsheet) is required for the submission of billing info for groups of 50 or more. If the enrollment data is submitted on paper, a set up fee of one time the monthly administrative fee will be charged.]

Paylogix® can also receive original enrollment documents (individual applications and payroll deduction authorizations) for billing set-up and forwarding to the carrier, but this must be prearranged, and there is an additional charge for this service.

1. Paylogix® will enter the enrollment data on the system, and send a payroll deduction initialization summary to the employer.

2. Paylogix® will run a test bill prior to going "live", and verify with the employer that the information is correct. Once the test is verified as correct, the real billing process will commence, usually effective the following month (according to the pre-determined dates, above.)

3. If anything happens to delay the enrollment, make sure to contact Paylogix® and the insurance carriers immediately to revise the policy and billing dating schedules as appropriate.