



# EMPLOYER WELCOME



*A new way to pay...*

Use Page Down key, press Esc. to exit

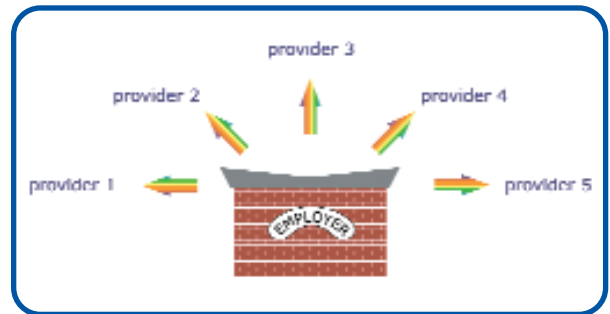
**Change is hard to embrace, but failing to keep up with important improvements is even harder. The intent of this pamphlet is to ease the transition for you, the employer, who are probably unfamiliar with Paylogix® and online billing, into understanding our advantages and what to expect from us.**

If you know the terms 'Consolidated Billing®' or 'Common Remitter™' you're halfway to knowing how Paylogix® simplifies employer tasks when administering benefit payments. If you haven't heard these terms, here's a short definition: The reduction of many bills into one, and of many payroll deductions into one.

The need for Consolidated Billing® arises because you as the employer, as a result of using multiple providers for your employee benefits, must also receive multiple bills, make multiple payroll deductions, send multiple payments, and retain multiple administrative contacts to keep records straight. This large amount of provider-related administration, combined with a limited number of deduction 'slots' available, is frustrating for all the parties involved. Paylogix® remedies this by consolidating provider bills into one bill and provider deductions into one deduction.



Employer is overrun by deductions, bills...



...and payment remittance



Paylogix® collects bills & remits payments...



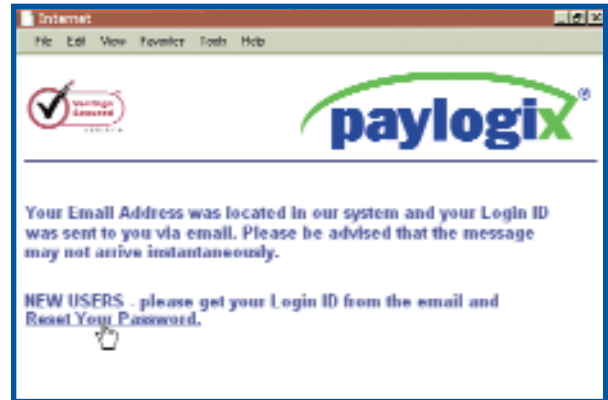
...employer gets 1 bill and makes 1 payment



Simply enter your e-mail address and submit to Paylogix®. The Paylogix® system will then compare your e-mail with those in our database to make a match:

While Paylogix® is an online service, we do send paper statements to those employers who need or want them. For those that will be using our online component, the first step will be logging in...

Go to [www.paylogix.com](http://www.paylogix.com) and click Login from the menu. This screen opens:



Your address on file will be e-mailed a Login ID



Click New User to request a Login ID

The Login ID is highlighted in this example:



Copy (Ctrl-C) the Login ID from the e-mail

Enter the e-mail address you'd provided us in the initial set-up of your account:



Contact us if you don't have an e-mail address

Make a note of your Login ID for future reference. Click Reset Your Password from the 'E-mail Located' Page (top) to establish a new Password...



Once your Login ID and Password have been assigned, you can go to [www.paylogix.com](http://www.paylogix.com) to log-in or to browse other areas of the site:



The Paylogix® Home Page

Each entity that has a hand in the benefit administration process, be they provider, employer, agent or employee, also has a face—or interface—on the Paylogix® system. These personal interfaces, once established, let entities view and edit relevant information, at their convenience and in a context that's paper-free. They're password-protected and the information contained in them is specific to and editable solely by the entity they've been set up for. Users should not share their passwords; sub-users can be assigned later if desired.

Once you've successfully logged-in through [paylogix.com](http://paylogix.com), take some time to familiarize yourself with the menu options available from your interface. It has been designed for your ease-of-use, and most importantly to provide a quick and simple process to keep information current with us. Click the Statements option and select [View Statements](#) to see your online bill. Click [Detail](#) from within this bill to view or edit employee information on it:




Explore & get acquainted

The [User Manual](#) provides visual demonstrations of these and other common tasks. The [Live Support](#) feature is also available to open a chat session with Paylogix® during normal business hours (Eastern time). The name & number of the specialist assigned to your account is listed, if you'd rather call.



Those who reconcile manually (not online) will find an area on the paper statement (received in the mail) that lists product premiums by employee with reason codes for why a premium may have changed:

If a premium has changed, circle the appropriate reason code (T = Terminated, C = Canceled, L = Leave, R = Return from Leave, O = Other), write the adjusted premium that's reflected in the payment, and we'll update our system with the new premium. New employees and coverage must also be listed. If changes aren't kept current manually or online, we'll have no way of providing accurate bills in the future.



*This confidential billing service is made available to you through your Capitol representative. Electronic Fund Transfer is available.*

**To assure accurate processing of your payment, please:**

- Circle one of the Reason Codes listed below to explain any difference between the amount billed and the amount being credited.
- Return a copy of this Statement (or payroll deduction information) with your payment when payment is different from the amount billed.
- Use the enclosed Return Envelope.

Attention: Arthur Millerson  
 Filer: Sales Organization  
 987 Queen Str. Suite 100, 13th Floor  
 Concord, NY 12345

### Billing Statement

Report Date: 11/04/2004  
 Period Ending: 11/27/2004  
 Deduct/Due Date: 12/01/2004

Employee	Product	Previous	ED	ED	Reason Code	Pr. Date
Rogers, Eric (999-99-9999)	Acme Cancer Care	\$11.07	\$11.07	\$11.07	T C L R O	
	Supreme Health LTD	\$9.84.02	\$0.00	\$4.62	T C L R O	
	Capitol Subtotal:	\$2.29	\$0.00	\$2.29		
Wallace, Stanley (888-88-8888)	Acme Cancer Care	\$4.62	\$0.00	\$4.62	T C L R O	
	Delaware Universal Life	\$9.24	\$0.00	\$9.24	T C L R O	
	Supreme Health LTD	\$4.62	\$0.00	\$4.62	T C L R O	01/10/04
	Capitol Subtotal:	\$18.50	\$0.00	\$18.50		

Please add anyittance notes or comments in the codes below:

**Example:** Employee added  
 Name: Joe Winthrop  
 SSN: 113 43 1433  
 Product: Acme Cancer Care  
 Premium: \$4.62

**Example:** Added coverage-  
 New Premium: \$6.53  
 (Payment now \$37.25)

Fee	Previous	ED	ED
Administrative Fee	\$0.00	\$0.00	\$0.00
Acme Cancer Care	\$0.00	\$0.00	\$9.24
Delaware Universal Life	\$9.24	\$0.00	\$0.00
Supreme Health LTD	\$9.24	\$0.00	\$9.24

Previous Balance: \$0.00  
 Current Due to: \$37.25  
 Total Payments: \$0.00  
 Payments Received: \$0.00  
**Total Due: \$37.25**

Please Remit ~~\$37.25~~ to:

PAYLOGIX  
 FUNDRAISERS ORGANIZATION  
 1025 OLD COUNTRY RD. STE 310  
 WILSTON, NY 11580

**Possible reasons for premium change.**

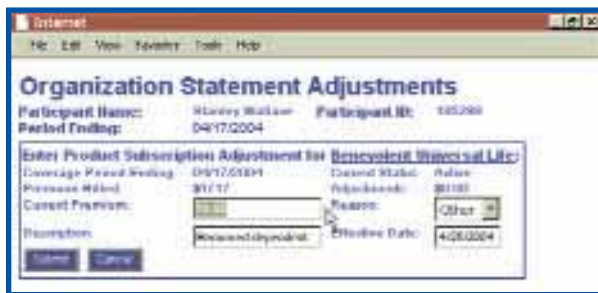
**Circle reason code, then indicate new premium and date effective**

**Statement total must match payment and all changes/new employees must be written on the bill or on an attached sheet of paper.**

Sample paper bill with manual reconciliation



**Keeping information up-to-date** with us is key to a smooth billing experience. Bills that don't match intended payments are the result of changes that haven't been recorded into the system. For example, an employer adjusting premiums from within an online bill might not realize that adjustments made on the bill affect that bill only. When the same premiums appear on the next bill, they could have trouble reconciling them. Permanently changing premiums is done through the [Products](#) option under the [Data](#) menu, not through the bill:

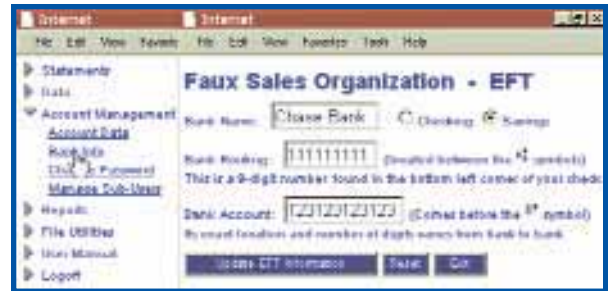


One-time premium change through statement



Permanent change through [Data](#) > [Products](#)

If you're reconciling online, when the bill matches the intended payment, simply click [Finalize](#), print it and remit with payment. If you're reconciling manually, document the proper changes before remitting. Contact Paylogix® if you'd like to set up wire transfer as a method of payment, or you can set up Electronic Funds Transfer (EFT) online. One payment satisfies all providers, and Paylogix® does the rest:



Electronic Funds Transfer (EFT) is set up here

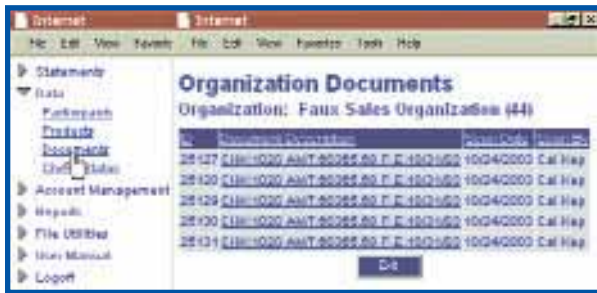
For large groups, whose changes may be too numerous and/or time-consuming to adjust individually, Paylogix® makes resources available to upload 'change files' in pre-specified formats such as Excel spread-sheets. Once uploaded, the data will be imported and implemented automatically to your billing record. This arrangement requires you to contact your Account Specialist for initial set-up:



Uploading 'change files' to our server

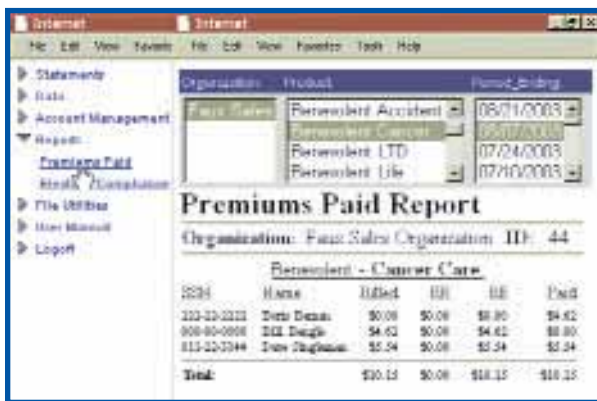


Once you get the hang of the Paylogix® system, you'll notice some added features which have been installed for your convenience. The Documents feature archives digital copies of correspondence, enrollment forms, checks, etc. relating to your organization:



Hard copies of documents are a click away.

The Reports feature details data such as Premiums Paid or Participant Activity and makes it quickly available for reference:



Premiums Paid report

Sum-ER-EE™ includes a real-time employee benefit statement, illustrating a customized cost breakdown of the benefits provided on the job:



Sum-ER-EE™ statement

Export utilities let you obtain customized extracts of data for import into other applications. Lastly, the Account Management tools enable you to manage interface access, assign sub-users, and automate transactions through Electronic Funds Transfer to eliminate bill & check remittance altogether.

This introduction has provided a preview of how you'll be interacting with us. Most of your Paylogix® experience will be hands-on, though, so this is really a primer for what's to come...

Employees	Employer % wishing to view bills online	Employer % wishing to edit bills online
Under 100	86	58
100 - 499	71	72
500 - 999	64	67
1000 - 5000	58	50
Over 5000	62	63

As an employer, are you among the above?