



Migrating Your Split Direct Deposit to PIOPAC® Is Easy

STEP

1

Determine Date Change

Determine the date and time in which the transfer to PIOPAC® should be effective

STEP

2

Educate Employer

Educate the employer and get their buy in. Provide the employer with the letter and explanation you **must** change bill facilitators, that you have a solution, and will be in contact with them soon. Use the links provided to better understand the solution to the employer.

Links

[Why PIOPAC](#)

[PIOPAC Solutions Flyer](#)

[Employer Facing-Flyer](#)

STEP

3

Forms and Signatures

Have the Employer sign PIOPAC's® Employer Direct Deposit Pay Authorization Form and then please email to: inquiry@piopacco.com Explain to employer or organization you will be providing them with new direct deposit numbers; and to ensure a smooth transition.

Link

[PIOPAC's Employer Direct Deposit Pay Authorization Form](#)

STEP

4

Billing Change

Advise the carrier of the billing contact change and effective date. PIOPAC® MUST be the new billing contact in order to pay future invoices.

Name: PIOPAC Fidelity
Contact Name Tennyson K. W. Lum Jr.
Email 1: tlumjr@piopac.com
Email 2: customerpremiums@piopac.com
Phone: (808) 792.5276

Links

[M0138](#)

[G0138](#)

[Resources Page](#)



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STEP 5

Accessing Agent Portal

Access the agent portal and either follow the link or enter the following:
<https://agent.piopac.com/> in browser

Link

Agent Portal

STEP 6

Register in Agent Portal

- Register in the agent portal.
- Watch instructional video if needed.
- Registered agents can create groups, assign enrollers, add participants, and run reports.

Links

Registration

Create Groups

Assign Enrollers

Add Participants

Run Reports

STEP 7

Create The Group

Simply follow this two-step process:

- Create the group in the agent portal.*
- Complete the New Case Profile Form and email to: inquiry@piopacco.com*

Links

Create The Group

Agent Portal

New Case Profile Form

STEP 8

Assign Premium Holding Accounts

- For groups with less than 25 participants, it is most efficient to simply add participants to the group in the agent portal.
- For groups with over 25 participants, simply email PIOPAC® the census with each participant info (down to the policy level)

Link

Add Participants