

How to Create a New Case with PIOPAC

STEP 1 Determine the Best Solution

- Is the organization or employer able/willing to push premiums for member/employee to PIOPAC via Direct Deposit from paycheck or 1099 compensation?
- Is there consistent pay being paid to member or employee that will cover the costs of premiums?
- Does the organization contain mostly employees or members with stable tenure?



If yes to all; DDP process below is the best option for this case.



If no, then EFT is the best option.

STEP 2 Register in Agent Portal

Each enrolling agent or administrative person involved must register.

[Video: How to Register](#)

[Registration](#)

STEP 3 Assign PIOPAC as Billing Contact With Carrier(s)

PIOPAC MUST be the billing contact in order to pay invoices. Employer name must match with both carrier & PIOPAC.

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

STEP 4 Create the Group

Creating the Group with PIOPAC is a simple 2-part process:

1. Complete the New Case Profile Form and email to: inquiry@piopac.com.
2. Create the group in the agent portal.

PLEASE ensure to submit as much information as possible on platforms, carriers, products, etc in the "additional Comments & Considerations box".

[Video: Creating a Group](#)

[New Case Profile](#)

[Agent Portal](#)

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STEP 5 Enrollment Options

Enroll account and collect payment information. If enrolling via enrollment platform, determine if payment information will be collected by the platform, or if the agent portal will be used to acquire payment information.

- When the agent portal is collecting the payment information, agent will enter payment information into agent portal. All enrollers need to be registered and added to the created group.
- When the platform is collecting both the enrollment AND payment information, only agent creating the group in the agent portal must be registered.

Platform must also be advised this is a PIOPAC facilitated group. In the event there is no available internet, a customized paper authorization form can be generated by contacting inquiry@piopacco.com. PIOPAC MUST receive payment information 10 days prior to first draft.

Video: Adding An Agent

Video: Adding A Participant

New Case Profile

STEP 6 Provide Participant Payment Information

EFT

If there is no internet at the time or place of enrollment to access the portal OR paper authorization forms and applications are the preferred collection method; a customized paper form can be requested by emailing inquiry@piopacco.com. These forms can also be requested at the time the [NCPF](#) is completed and sent to PIOPAC. Authorization forms must be received 10 days before the first draft is scheduled to take place.

DDP

Have employer Review and sign:

- Employer Direct Deposit Pay Agreement
 - Email Employer Agreement to inquiry@piopacco.com
 - Enter participant data into agent portal and have DDP account assigned
 - Post enrollment provide PIOPAC report to employer to push funds to PIOPAC accordingly
- * If employer requires paper authorization to push direct deposits, use their form or the Employer Direct Deposit Authorization Form.

* If no agent portal is used to assign accounts, provide enrollment file without social security numbers to inquiry@piopacco.com. PIOPAC will return file with assigned numbers within 2 business days.

DDP Employer Authorization Form

DDP Employee Authorization Form

Learn more on our resources web site