PIOPAC Payment Processing

Setup & Enrollment Experience

Setting up PIOPAC Fidelity as a Payment Provider

PIOPAC Fidelity provides solutions to brokers, unions, associations, and employers when payroll deduction is not an option.

PIOPAC is currently integrated with Selerix BenSelect, the benefits administration platform, using an API connection. If you will be working with a case that uses PIOPAC for payment processing, follow the steps below to allow your case to directly communicate payment information to PIOPAC, with no sensitive information stored in BenSelect.

Setting up the case for PIOPAC includes the following steps:

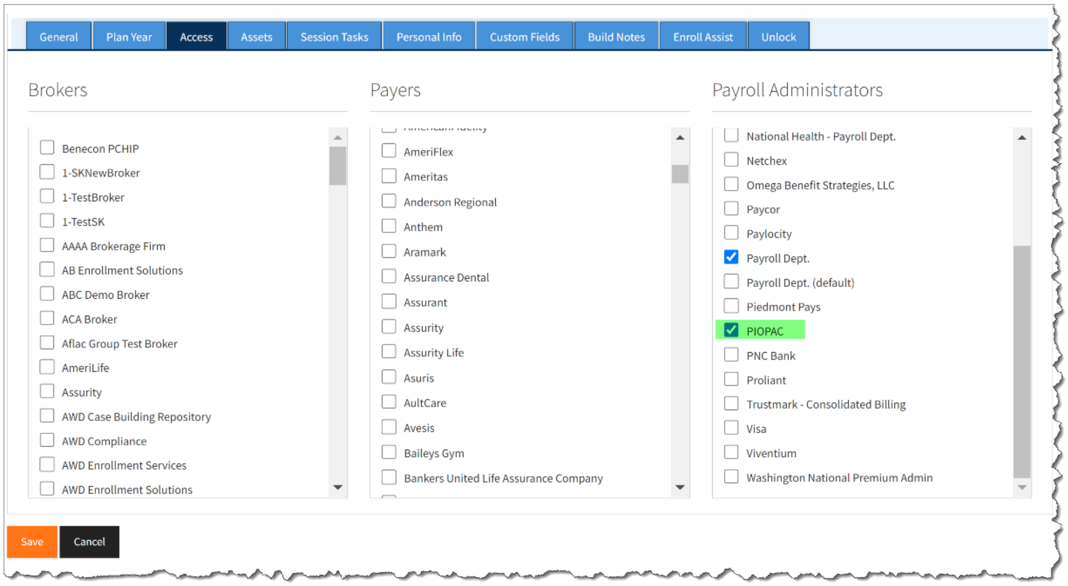
1. Add PIOPAC as a Payroll Administrator to your case
2. Add “External Payment Provider” to the list of accepted payment methods.
3. Configure the Plug-in.
4. Configure the Paygroup for PIOPAC.
5. Set up the benefit plan for PIOPAC payment transmission.
6. Set up the EDI parameters for the products.
7. Test the enrollment.

PIOPAC provides a setup guide containing the information needed to ensure the integration is seamless, if setup correctly. This information includes the following:

- PIOPAC Carrier Name (value goes in SubnetworkID)
- PIOPAC Policy Type (value goes in Subgroup Number)
- PIOPAC Policy Subtype (value goes in Plan SubCode) - if provided and required by PIOPAC – optional
- PIOPAC Policy PlanCode (value goes in PlanCode) - if provided and required by PIOPAC – optional
- Group ID (value goes in Plug-in created in Step 3)

Step 1: Add PIOPAC Access to the Case

1. Select ***Case Info*** from the ***Case Setup*** menu.
2. Click the ***Access*** tab.
3. Select **PIOPAC** from the Payroll Administrators list, as shown below.



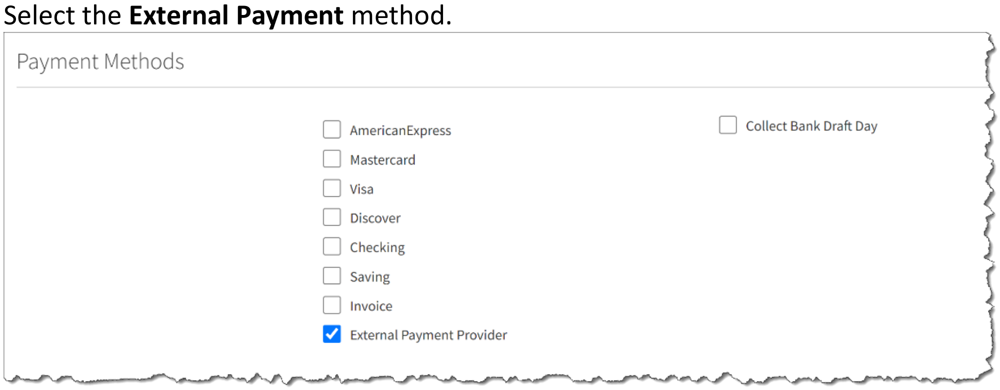
4. Click **Save**.

Step 2: Add an External Payment Provider to the Case

For a payment method to be available for selection in an enrollment, you must first make it available as a payment method for the case.

To add an external payment provider to a case:

1. Select ***Case Info*** from the ***Case Setup*** menu.
2. Click the ***Personal Info*** tab to display options for setting up how personal information is displayed in the enrollment.
3. Scroll down to the Payment Methods section.
4. Select the **External Payment** method.



This indicates that the system will allow configured plug-ins (rather than built-in methods) to take payment information during enrollment.

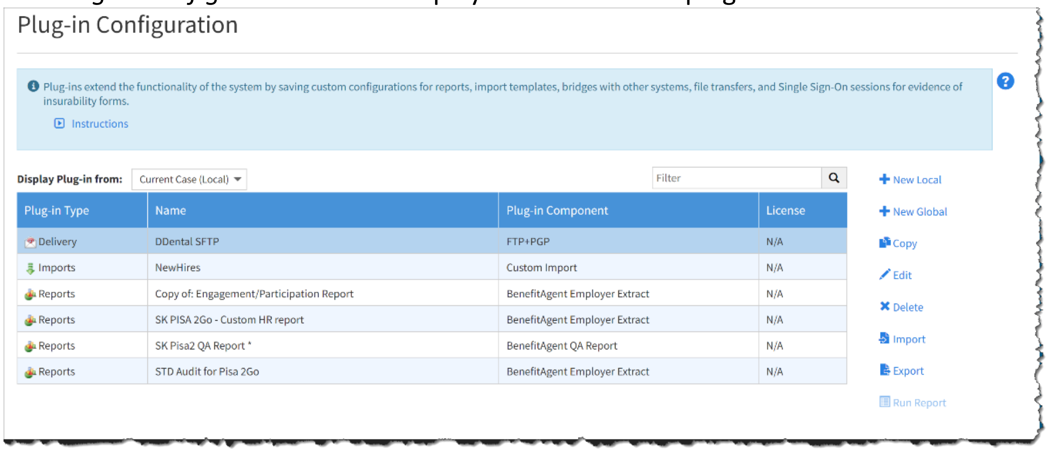
5. Click the **Save** button to save the updates to the case configuration.

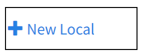
Now you can configure the plug-in to use.

Step 3: Configure the Plug-in

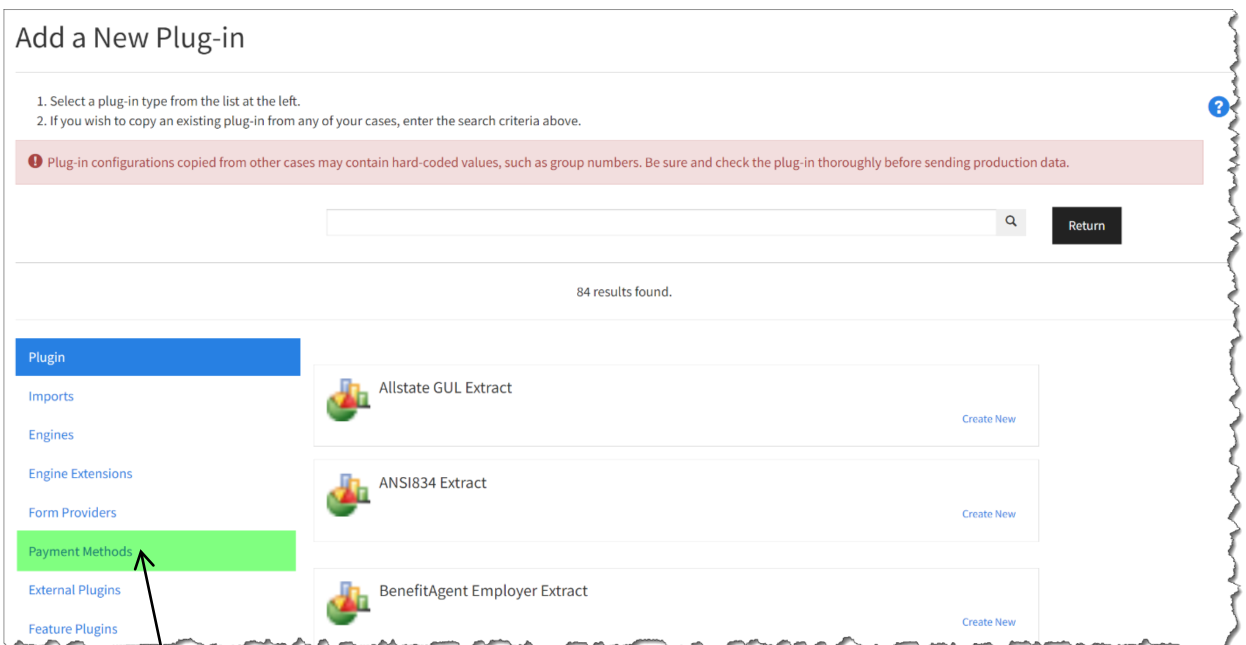
Next, set up the plug-in for the payment method.

1. Select ***Plug-ins*** from the ***Case Setup*** menu.
   The *Plug-in Configuration* screen displays a list of default plug-ins for the current case.



2. Click the **New Local** button. 

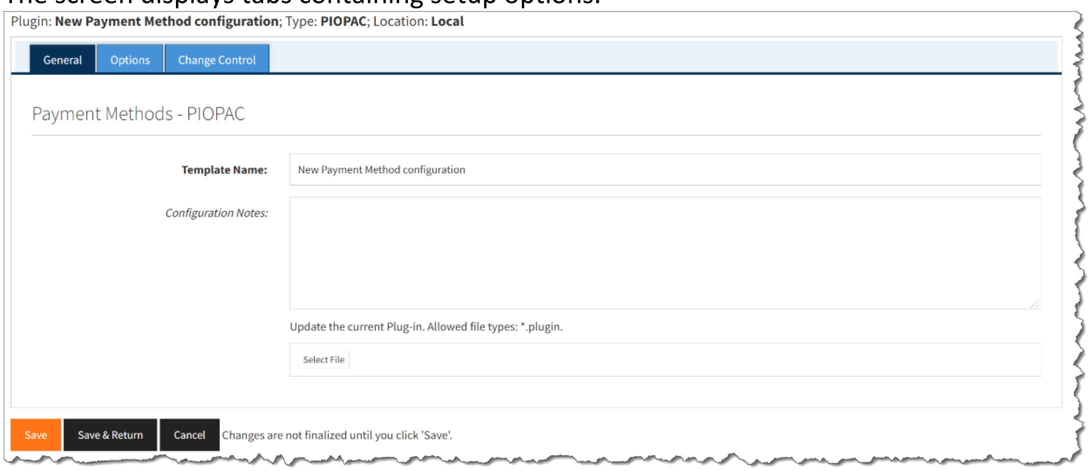
   The *Add a New Plug-in* screen displays options for creating a new plug-in.



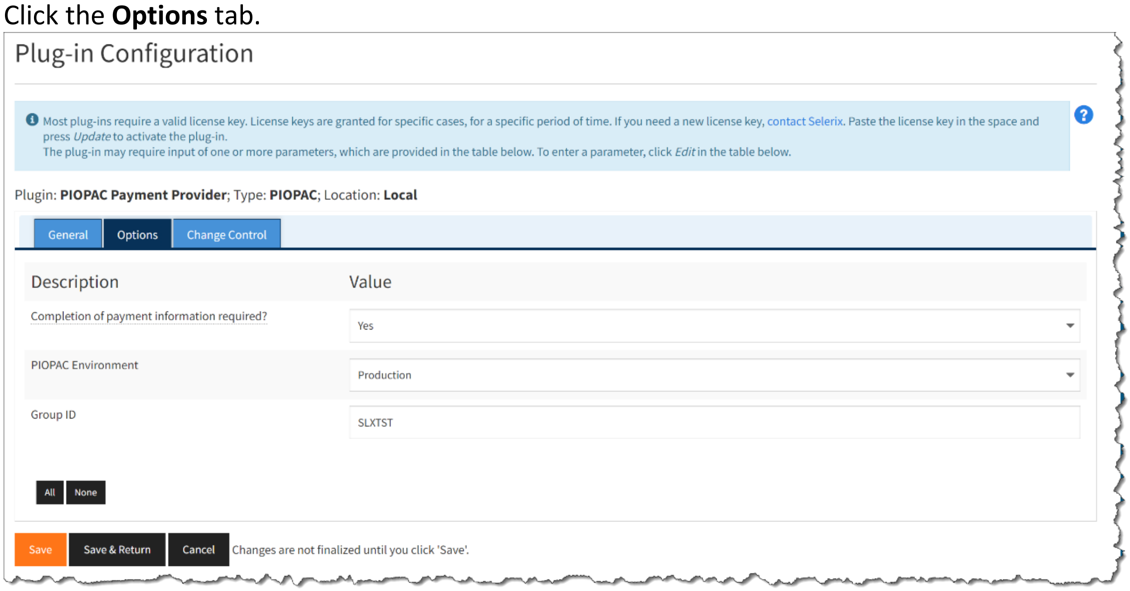
Select the type of plug-in that you are adding.

3. Click the Payment Methods option on the left side of the screen.
   The options for payment methods appear.

4. Click **Create New** to the right of "PIOPAC".
   The screen displays tabs containing setup options.



5. On the **General** tab, in the **Template Name** field, type a name for the plug-in.
   You may want to use "PIOPAC Payment Provider" so that you can easily find and remember the plug-in for the payment provider.
6. Click **Save** before you move to the next tab.
7. Click the **Options** tab.



Use the following table as a guide to configure the options.

Field	Value to be used
Completion of payment information required?	Select Yes to have BenSelect require completion of payment information before enrollment can be completed.
PIOPAC Environment	Set this option to Production, which sends the payment information in real-time to PIOPAC for processing.
Group ID	Enter the Group ID provided by PIOPAC, which is specific to the current employer group/case. (in the example above, SLXTST is only used as an example.)

8. Click **Save** to update the plug-in.

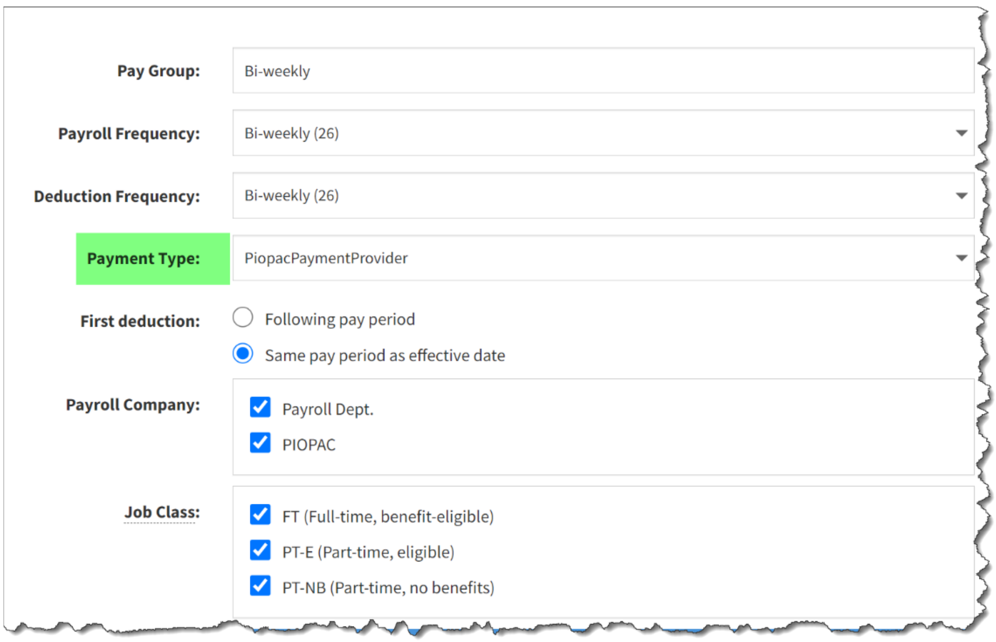
Now you can set up a Pay Group to associate with employees.

Step 4: Configure the Pay Group

When employees have different payment types associated, you need to set up different pay groups. For this PIOPAC payment provider (via API), set up a pay group with the Payment Type of "PiopacPaymentProvider".

To add a pay group for the payment provider:

1. Select ***Pay group*** from the ***Case Setup*** menu.
   The *Pay Group* screen provides options for pay group setup.
2. Click **Add** to create a new pay group.
3. Enter the required information (Pay Group, Payroll Frequency, Deduction Frequency).
4. Set the Payment Type to **PiopacPaymentProvider**.



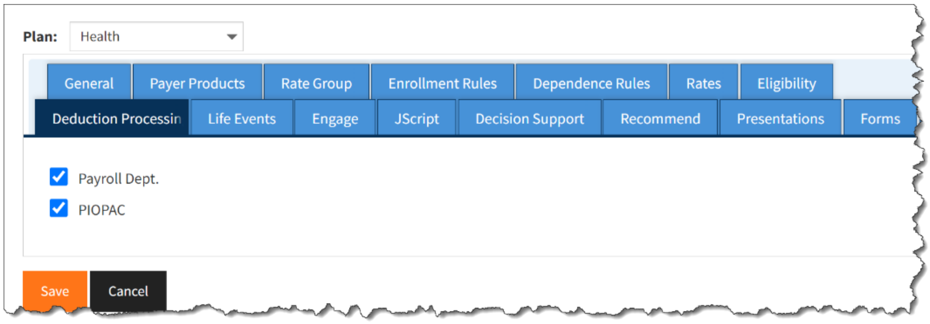
5. Select **PIOPAC** for the Payroll Company, JobClass(es), and enter the dates for the Payroll Calendar.
6. Click **Save** to save the Pay Group information.

Now you can configure the benefit plans that will use this payment provider.

Step 5: Select PIOPAC on Benefit Plans

Set PIOPAC as the payroll administrator for the affected benefit plans.

1. Select ***Benefit Plans*** from the ***Case Setup*** menu.
2. Select a benefit plan that will use PIOPAC Payment Processing.
3. Click the **Deduction Processing** tab.
4. Select the PIOPAC payroll administrator.



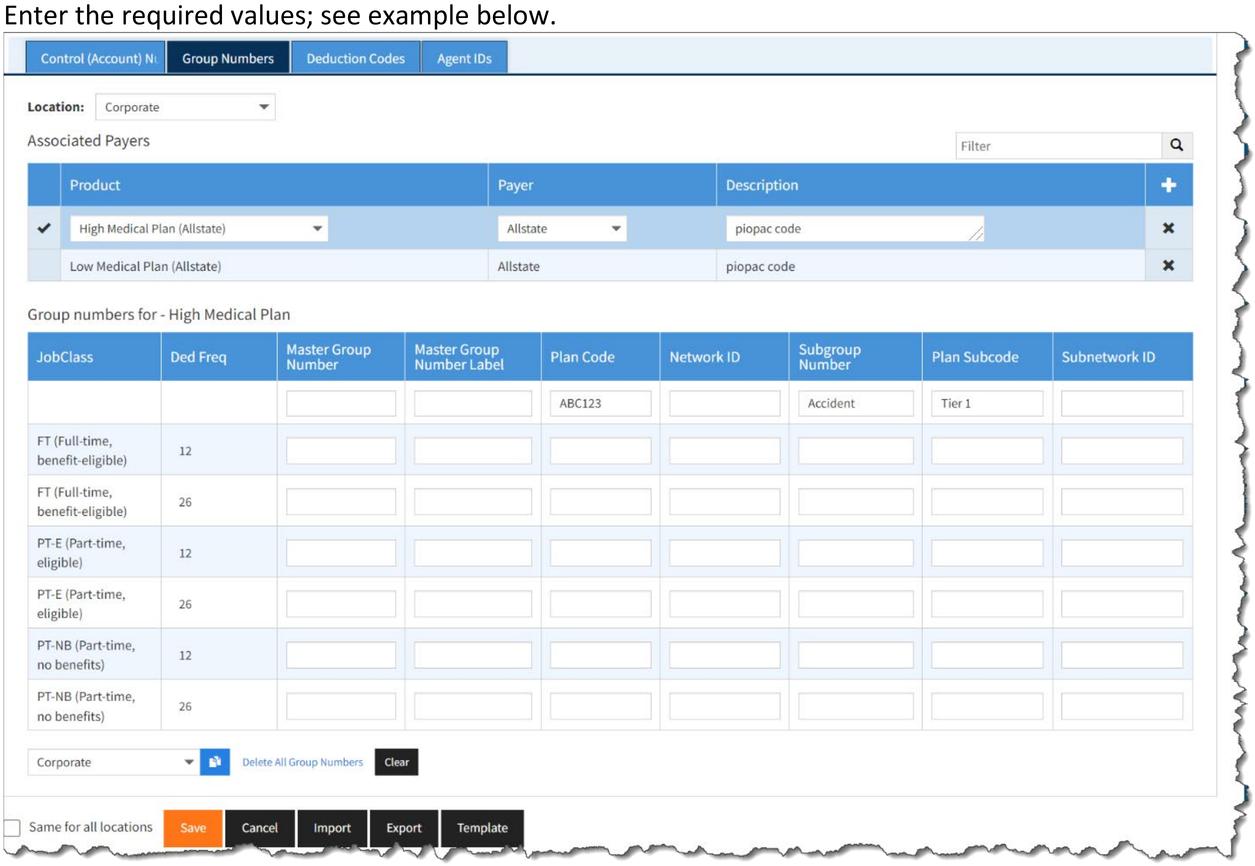
5. Click **Save**.
6. Complete steps 2 – 5 for each benefit plan using the PIOPAC payment processing method.

Step 6: Set up the EDI Parameters

Use the information provided by PIOPAC in the Group Setup document to complete the EDI parameter configuration. This information includes the following:

- PIOPAC Carrier Name (value goes in SubnetworkID) - this information must match the carrier name for the product **EXACTLY**
- PIOPAC Policy Type (value goes in Subgroup Number)
- PIOPAC Policy Subtype (value goes in Plan SubCode) - if provided and required by PIOPAC – optional
- PIOPAC Policy PlanCode (value goes in PlanCode) - if provided and required by PIOPAC – optional

1. Select ***EDI*** from the ***Case Setup*** menu.
2. Click the ***Group Numbers*** tab.
3. From the Associated Payers list, select the Product.
4. Enter a description, such as PIOPAC code, if you want.
5. Enter the required values; see example below.

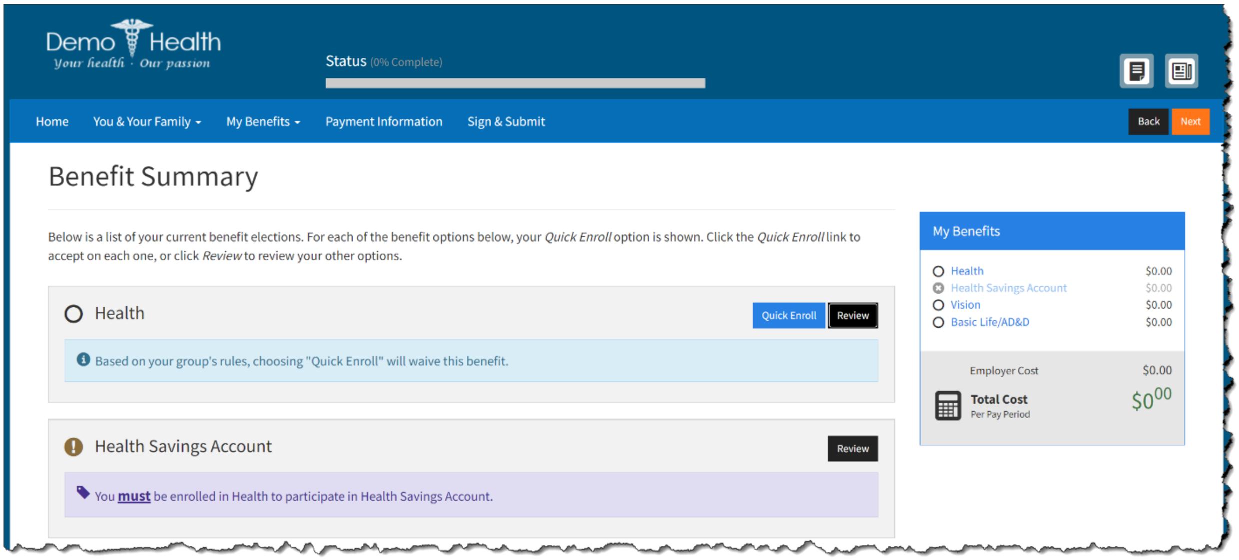


6. Click **Save** to save your updates.

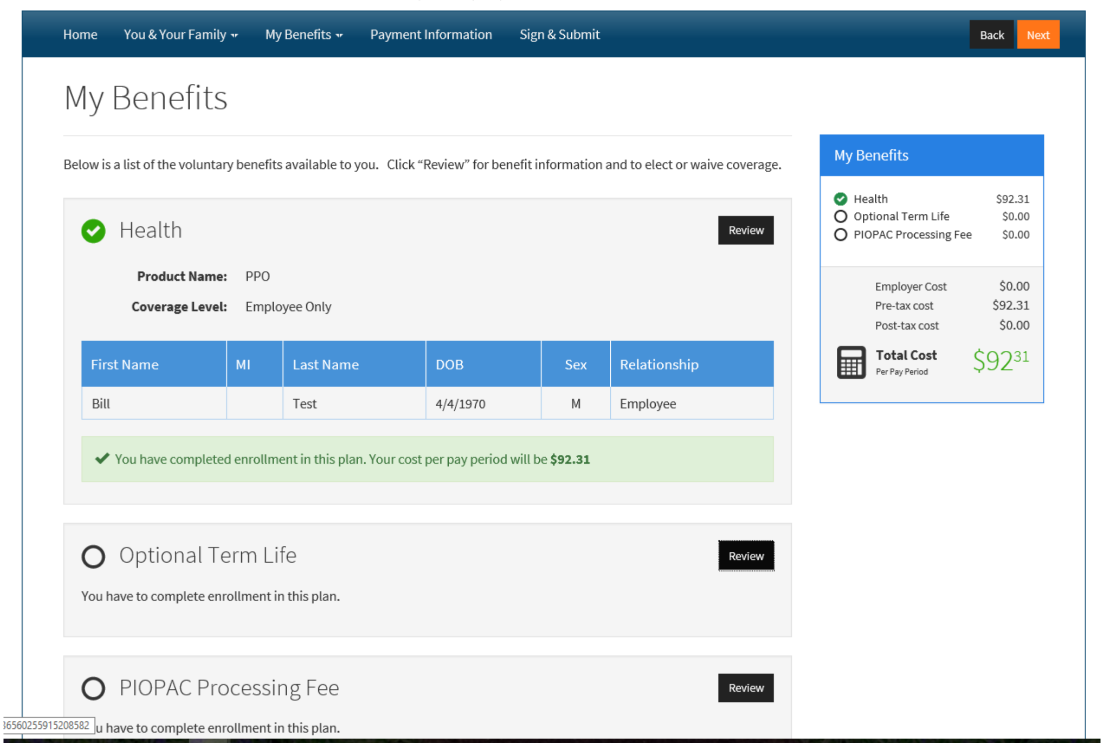
Step 7: Test the Enrollment

After you have completed the PIOPAC setup, test the flow of the enrollment to ensure the PIOPAC Processing Fee plan, terms and payment pages display as designed.

1. Open an employee record, and click **Enroll**.
   The Home page of the Enrollment site displays a Welcome message, specific to the employer group.
2. Go to the **My Benefits** page

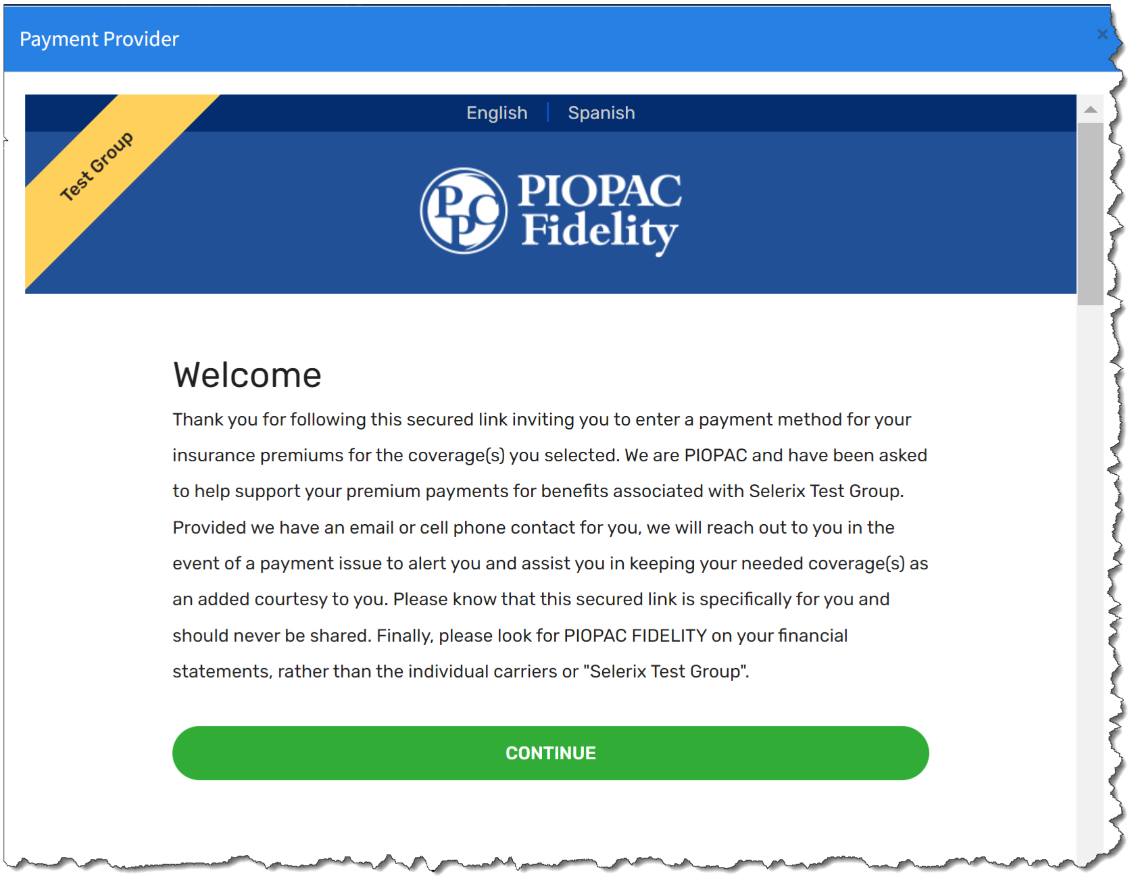


3. Click **Review** to open a plan application and make selections.

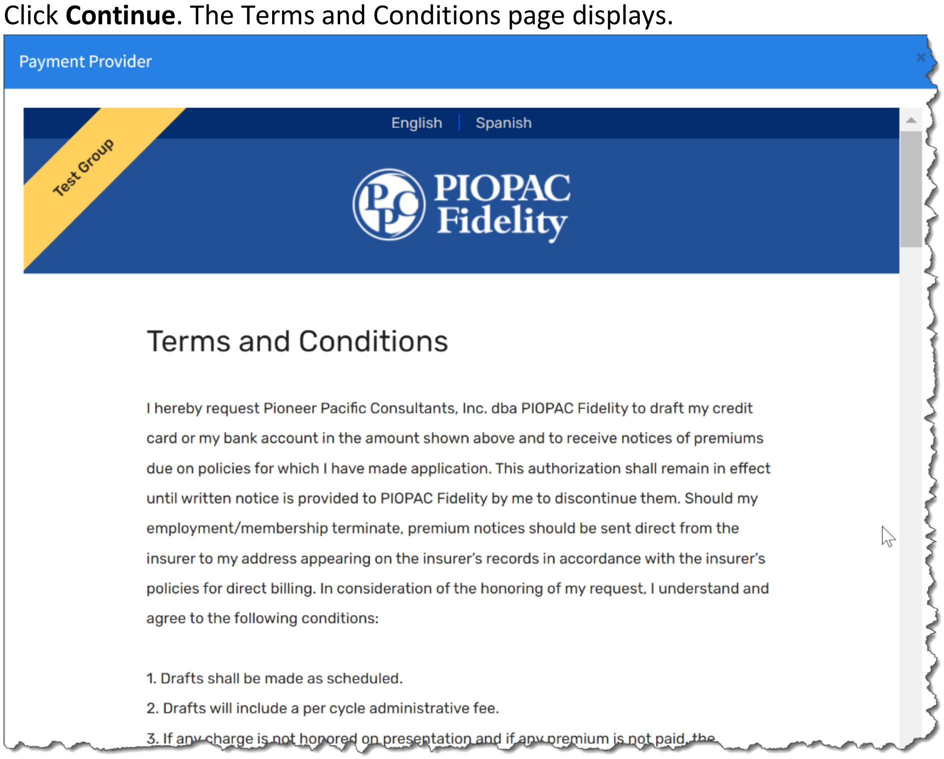


4. Complete your selections in the benefit plans.

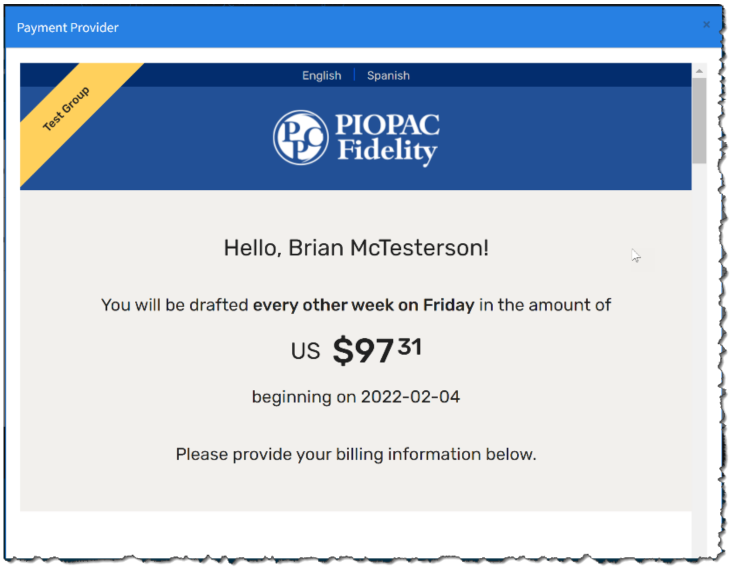
5. Click **Next** to proceed to the PIOPAC payment collection screens.



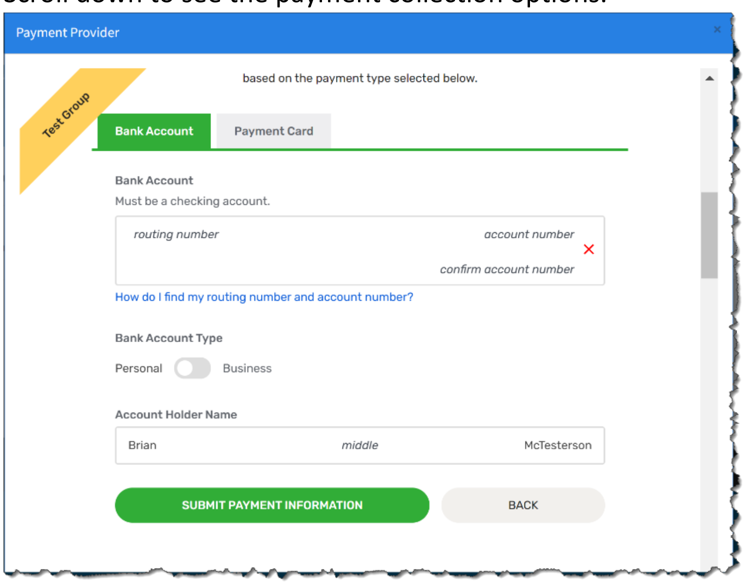
6. Click **Continue**. The Terms and Conditions page displays.



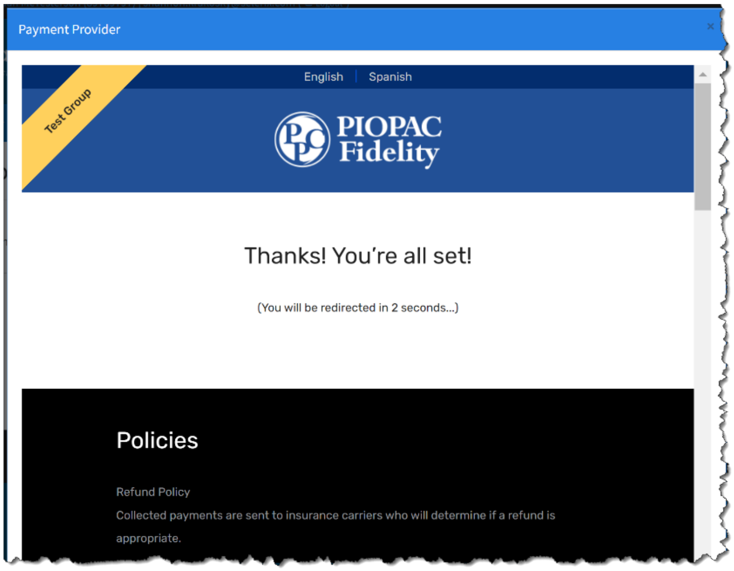
7. Scroll down and click the Acceptance button.
8. The Payment page displays, showing deduction amounts and allowing the employee to complete the information for the payment.



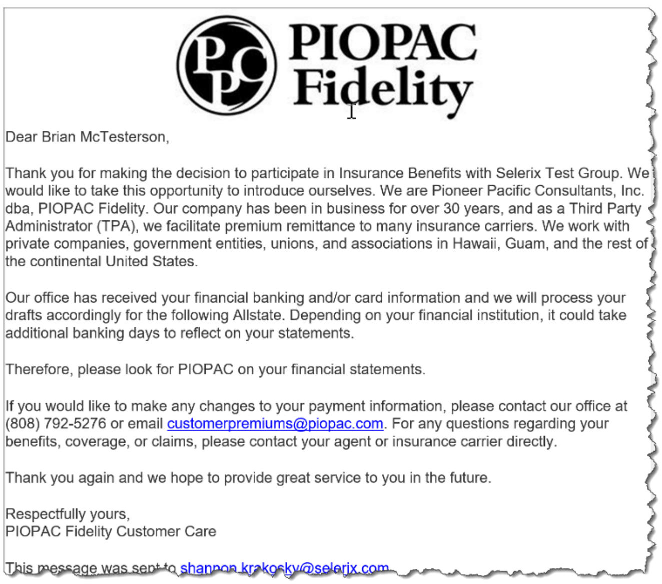
9. Scroll down to see the payment collection options.



10. After information is entered (for either the Bank Account or Payment Card method), click **Submit Payment Information**. A confirmation page displays



The employee will receive an email, such as the following, if an email address for the employee exists in the system.



PIOPAC Fidelity

Dear Brian McTesterson,

Thank you for making the decision to participate in Insurance Benefits with Selerix Test Group. We would like to take this opportunity to introduce ourselves. We are Pioneer Pacific Consultants, Inc. dba, PIOPAC Fidelity. Our company has been in business for over 30 years, and as a Third Party Administrator (TPA), we facilitate premium remittance to many insurance carriers. We work with private companies, government entities, unions, and associations in Hawaii, Guam, and the rest of the continental United States.

Our office has received your financial banking and/or card information and we will process your drafts accordingly for the following Allstate. Depending on your financial institution, it could take additional banking days to reflect on your statements.

Therefore, please look for PIOPAC on your financial statements.

If you would like to make any changes to your payment information, please contact our office at (808) 792-5276 or email customerpremiums@piopac.com. For any questions regarding your benefits, coverage, or claims, please contact your agent or insurance carrier directly.

Thank you again and we hope to provide great service to you in the future.

Respectfully yours,
PIOPAC Fidelity Customer Care

This message was sent to shannon.krakosky@selerix.com

After confirmation forms are signed and submitted, the enrollment is complete.