



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.

The screenshot shows the 'Access' tab of a software interface. It features three columns: 'Brokers', 'Payers', and 'Payroll Administrators'. The 'Payroll Administrators' column is the focus, with 'PIOPAC' selected and highlighted in green. Other options in this column include National Health - Payroll Dept., Netchex, Omega Benefit Strategies, LLC, Paycor, Paylocity, Payroll Dept., Payroll Dept. (default), Piedmont Pays, PNC Bank, Proliant, Trustmark - Consolidated Billing, Visa, Viventum, and Washington National Premium Admin. The 'Save' and 'Cancel' buttons are located at the bottom left of the interface.

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.

The screenshot shows the 'Payment Methods' section of a software interface. It contains a list of payment methods with checkboxes. The 'External Payment Provider' option is selected and highlighted in blue. Other options include AmericanExpress, Mastercard, Visa, Discover, Checking, Saving, Invoice, and Collect Bank Draft Day.

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.

Plug-in Configuration

Plug-ins extend the functionality of the system by saving custom configurations for reports, import templates, bridges with other systems, file transfers, and Single Sign-On sessions for evidence of insurability forms.

[Instructions](#)

Display Plug-in from: Current Case (Local) Filter

Plug-in Type	Name	Plug-in Component	License
Delivery	DDental SFTP	FTP+PGP	N/A
Imports	NewHires	Custom Import	N/A
Reports	Copy of: Engagement/Participation Report	BenefitAgent Employer Extract	N/A
Reports	SK PISA 2Go - Custom HR report	BenefitAgent Employer Extract	N/A
Reports	SK PISA2 QA Report *	BenefitAgent QA Report	N/A
Reports	STD Audit for PISA 2Go	BenefitAgent Employer Extract	N/A

+ New Local
+ New Global
Copy
Edit
Delete
Import
Export
Run Report

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



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

Add a New Plug-in

1. Select a plug-in type from the list at the left.
2. If you wish to copy an existing plug-in from any of your cases, enter the search criteria above.

Plug-in configurations copied from other cases may contain hard-coded values, such as group numbers. Be sure and check the plug-in thoroughly before sending production data.

84 results found.

- Plugin
- Imports
- Engines
- Engine Extensions
- Form Providers
- Payment Methods
- External Plugins
- Feature Plugins

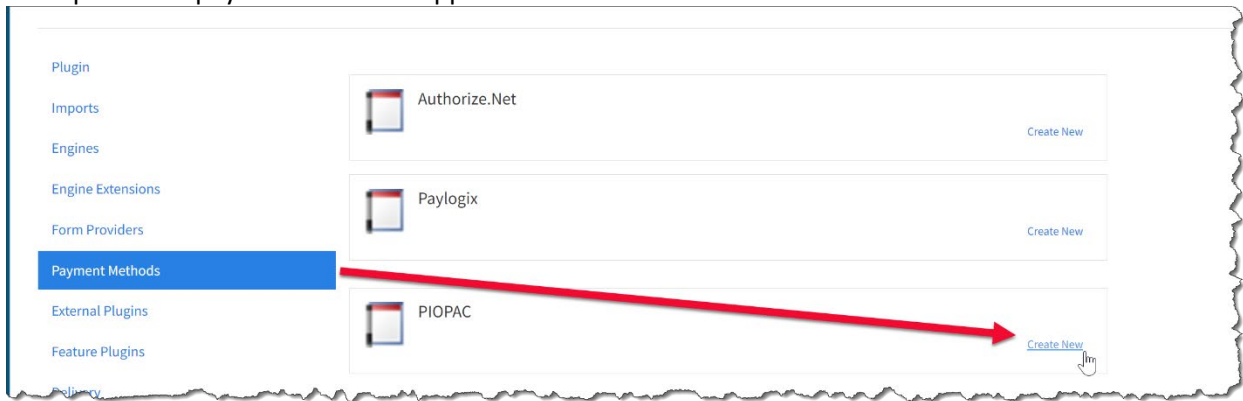
Allstate GUL Extract [Create New](#)

ANSI834 Extract [Create New](#)

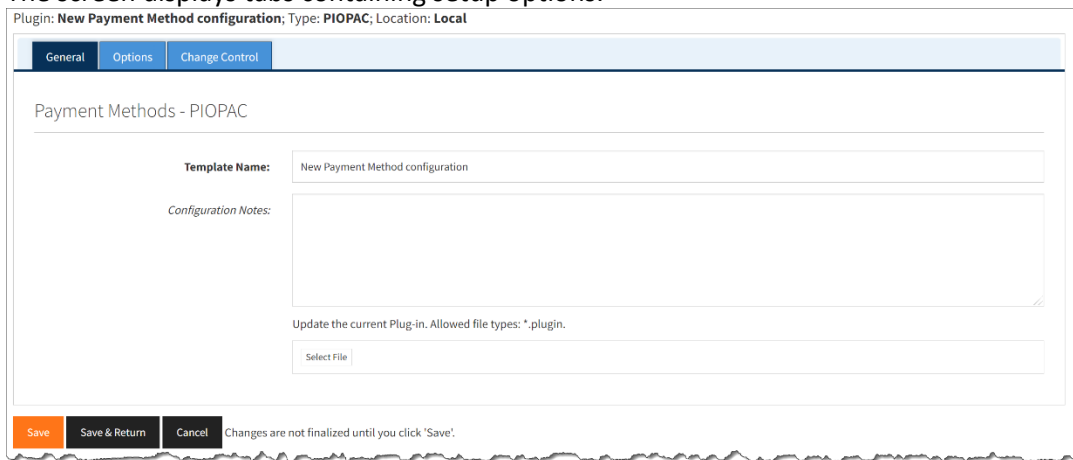
BenefitAgent Employer Extract [Create New](#)

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

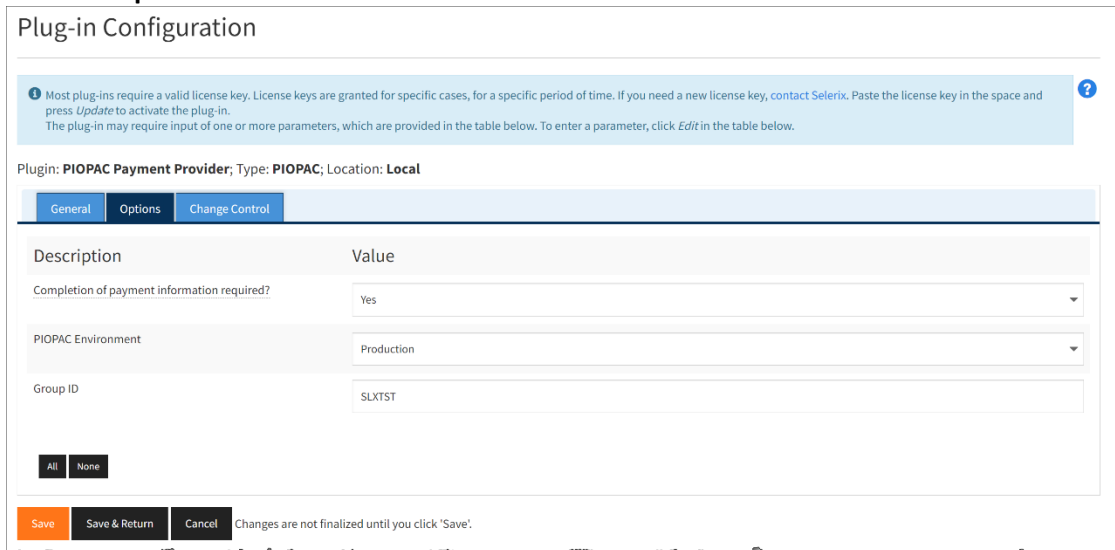
3. Click the **Payment Methods** option on the left side of the screen. The options for payment methods appear.



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.

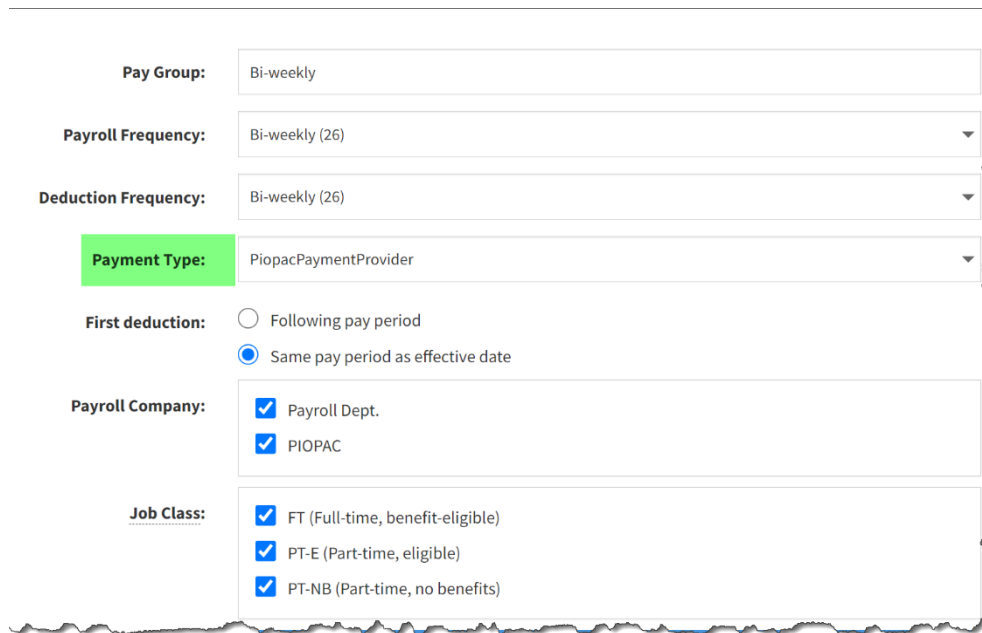
Now you can set up a Pay Group to associate with employees.

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**.



The screenshot shows a web form for configuring a pay group. The fields are as follows:

- Pay Group:** Bi-weekly
- Payroll Frequency:** Bi-weekly (26)
- Deduction Frequency:** Bi-weekly (26)
- Payment Type:** PiopacPaymentProvider (highlighted in green)
- First deduction:** Following pay period, Same pay period as effective date
- Payroll Company:** Payroll Dept., PIOPAC
- Job Class:** FT (Full-time, benefit-eligible), PT-E (Part-time, eligible), PT-NB (Part-time, no benefits)

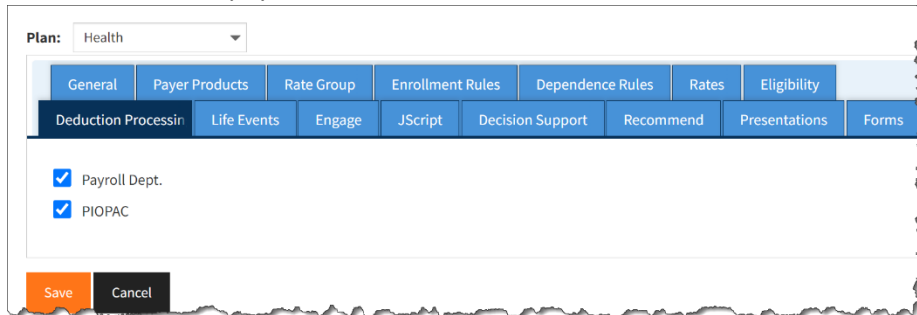
5. Select **PIOPAC** for the Payroll Company, JobClass(es), and enter the dates for the Payroll Calendar.
6. Click **Save** to save the Pay Group information.

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.



The screenshot shows a web interface for configuring a benefit plan. At the top, there is a dropdown menu labeled "Plan:" with "Health" selected. Below this is a horizontal navigation bar with several tabs: "General", "Payer Products", "Rate Group", "Enrollment Rules", "Dependence Rules", "Rates", "Eligibility", "Deduction Processing" (which is highlighted in dark blue), "Life Events", "Engage", "JScript", "Decision Support", "Recommend", "Presentations", and "Forms". Under the "Deduction Processing" tab, there are two checked checkboxes: "Payroll Dept." and "PIOPAC". At the bottom of the form, there are two buttons: "Save" (orange) and "Cancel" (black).

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.

The screenshot shows the 'Group Numbers' configuration interface. At the top, there are tabs for 'Control (Account) NI', 'Group Numbers', 'Deduction Codes', and 'Agent IDs'. Below the tabs, there is a 'Location' dropdown set to 'Corporate'. The 'Associated Payers' section contains a table with columns for Product, Payer, and Description. Two rows are visible: 'High Medical Plan (Allstate)' and 'Low Medical Plan (Allstate)'. The 'High Medical Plan' row is selected, and its 'Description' field contains 'piopac code'. Below this is a table titled 'Group numbers for - High Medical Plan' with columns: JobClass, Ded Freq, Master Group Number, Master Group Number Label, Plan Code, Network ID, Subgroup Number, Plan Subcode, and Subnetwork ID. The first row in this table has 'ABC123' in the Plan Code field, 'Accident' in the Subgroup Number field, and 'Tier 1' in the Plan Subcode field. At the bottom of the interface, there is a 'Corporate' dropdown, a 'Delete All Group Numbers' button, and a 'Clear' button. A row of buttons includes 'Same for all locations' (checkbox), 'Save', 'Cancel', 'Import', 'Export', and 'Template'.

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

Benefit Summary

Below is a list of your current benefit elections. For each of the benefit options below, your *Quick Enroll* option is shown. Click the *Quick Enroll* link to accept on each one, or click *Review* to review your other options.

- Health Quick Enroll Review
Based on your group's rules, choosing "Quick Enroll" will waive this benefit.
- Health Savings Account Review
You **must** be enrolled in Health to participate in Health Savings Account.

My Benefits

Health	\$0.00
Health Savings Account	\$0.00
Vision	\$0.00
Basic Life/AD&D	\$0.00
Employer Cost	\$0.00
Total Cost Per Pay Period	\$0.00

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

My Benefits

Below is a list of the voluntary benefits available to you. Click "Review" for benefit information and to elect or waive coverage.

- Health Review
Product Name: PPO
Coverage Level: Employee Only

First Name	MI	Last Name	DOB	Sex	Relationship
Bill		Test	4/4/1970	M	Employee

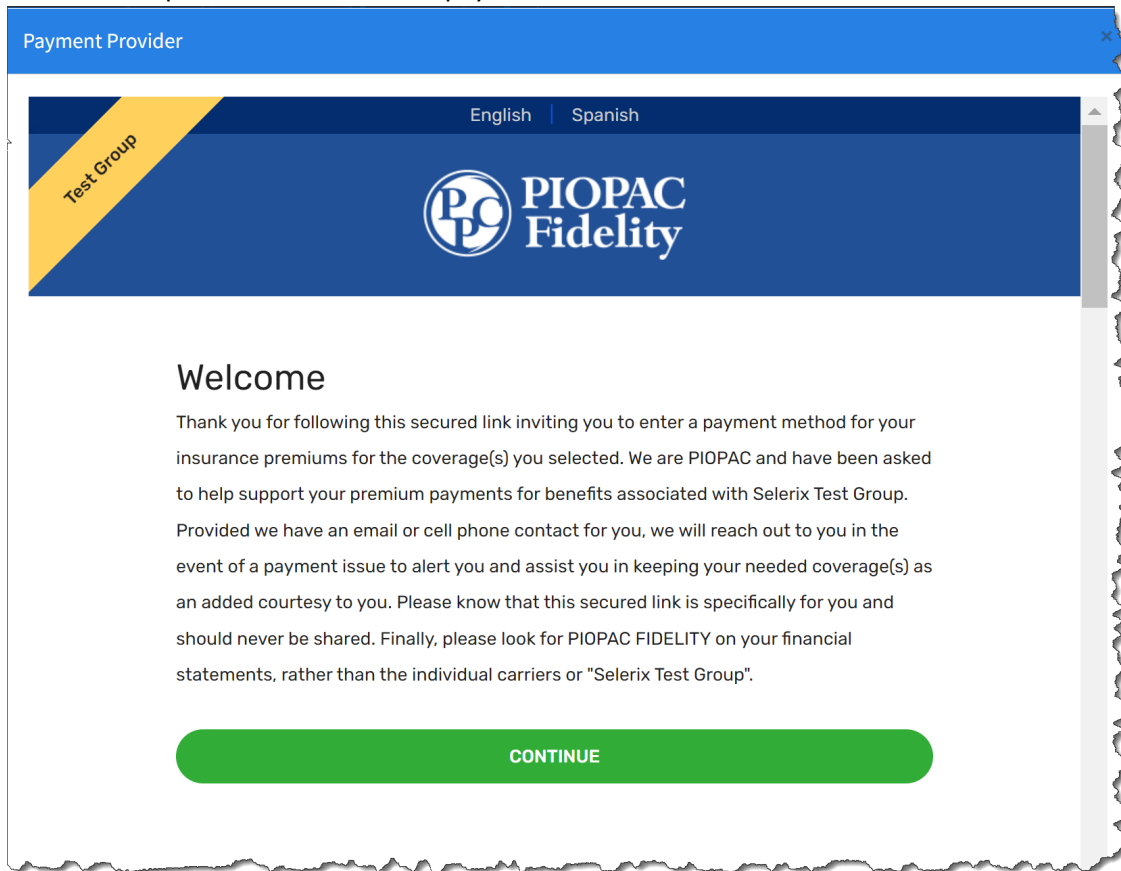
You have completed enrollment in this plan. Your cost per pay period will be **\$92.31**
- Optional Term Life Review
You have to complete enrollment in this plan.
- PIOPAC Processing Fee Review
You have to complete enrollment in this plan.

My Benefits

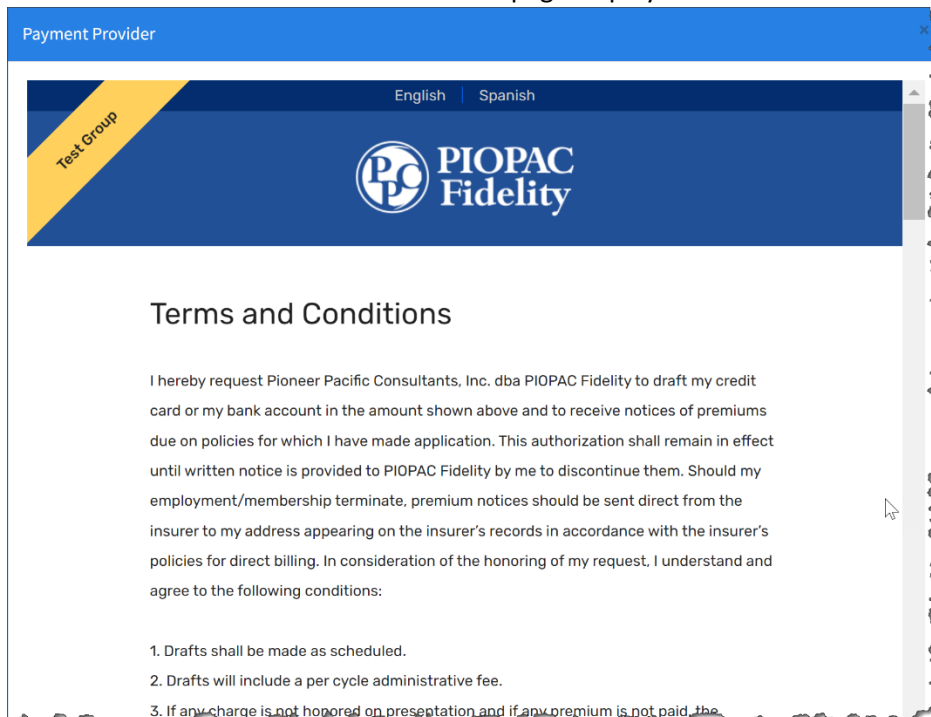
Health	\$92.31
Optional Term Life	\$0.00
PIOPAC Processing Fee	\$0.00
Employer Cost	\$0.00
Pre-tax cost	\$92.31
Post-tax cost	\$0.00
Total Cost Per Pay Period	\$92.31

4. Complete your selections in the benefit plans.

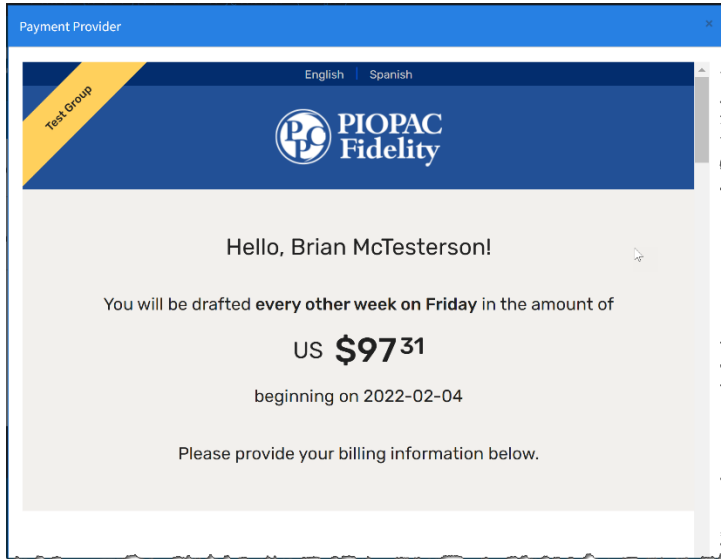
5. Click **Next** to proceed to the PIOPAC payment collection screens.



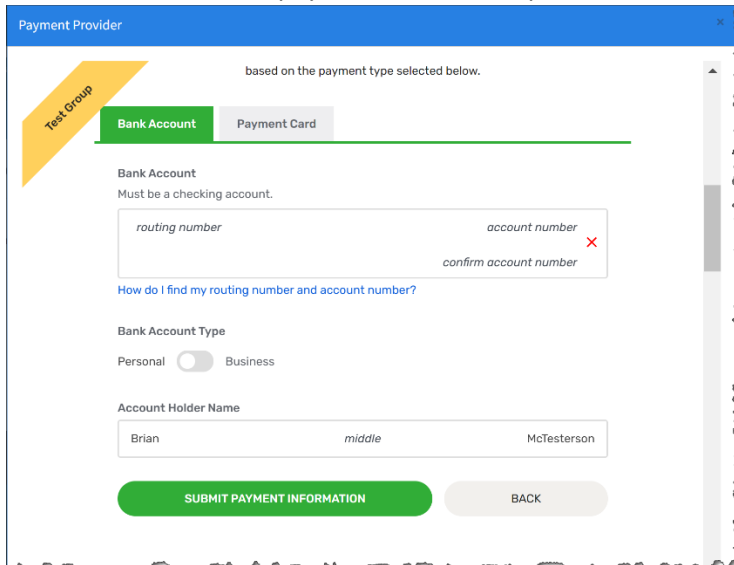
6. Click **Continue**. The Terms and Conditions page displays.



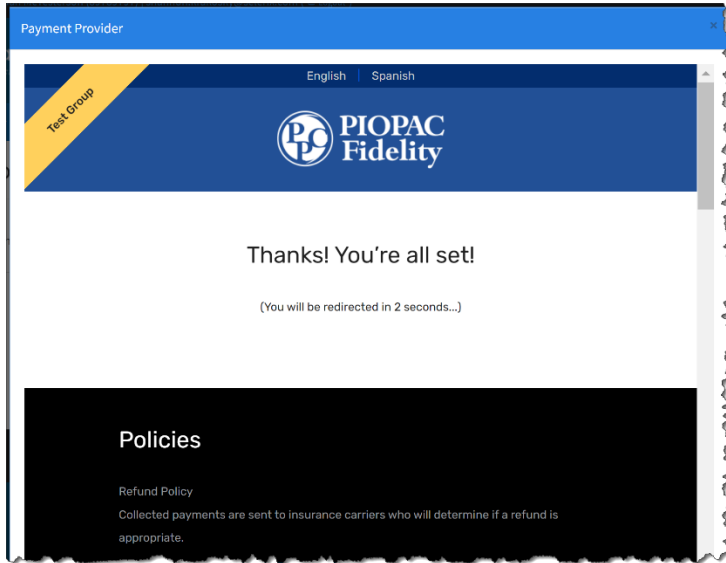
7. Scroll down and click the Acceptance button.
8. The Payment page displays, showing deduction amounts and allowing the employee to complete the information for the payment.



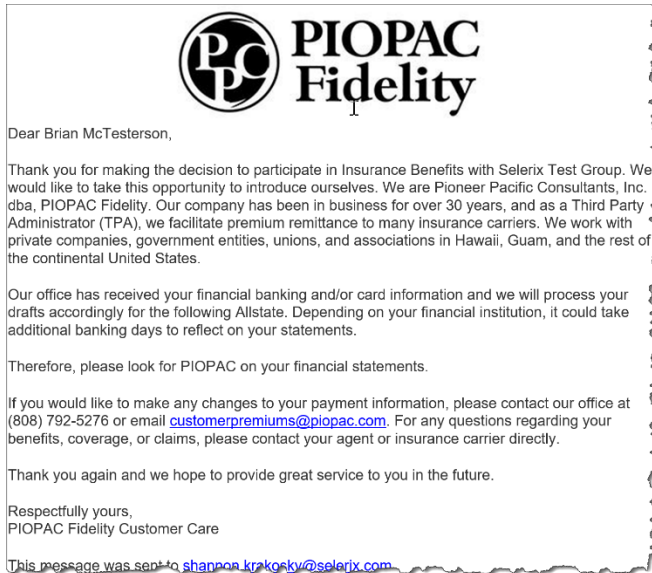
9. Scroll down to see the payment collection options.



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.



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