

Transitioning a “Split Direct Deposit” to Paylogix

When moving a case to the Paylogix direct deposit service, your Broker Relationship Manger is available to assist with the transition. Here is an overview of the steps you will take to transition your case.

- STEP 1.** Determine the effective date for the change to Paylogix direct deposit.
- STEP 2.** Inform your client of the upcoming change and why it is necessary. Paylogix provides helpful resources on www.paylogix.com to smooth the transition and answer your client's questions. Custom materials are also available upon request.
- STEP 3.** Collaborate with your Paylogix Broker Relationship Manager to complete the online client data form (CDF). A link to the CDF may be found on the footer of www.paylogix.com.
- STEP 4.** Advise the insurance carrier or benefit provider that the billing contact will change to Paylogix and the effective date. Your Paylogix Broker Relationship Manager is available to assist with this notification. When you receive confirmation or acknowledgement of the change, please forward to your Paylogix representative.

Remember: Co-op funding partners must approve new cases.

- STEP 5.** Determine how to provide direct deposit forms to your enrollers and their enrollees/participants. There are two options available.
- STEP 6. **THIRD PARTY ENROLLMENT INTEGRATION****
Paylogix Merchant Gateway integrated with third party enrollment companies can provide partially or fully individualized pre-populated direct deposit forms at the time of enrollment.
- STEP 7. **DOWNLOAD PRE-FILLED INDIVIDUAL FORMS****
Through the Paylogix client portal a broker may download partially or fully individualized direct deposit forms. Participant information can be pre-populated by providing Paylogix with a census file in advance. If not, participant data can be manually added in real time. A census file template is available through your Paylogix representative.
- STEP 8.** If there is a policy change that effects the direct deposit amount it may also require a new direct deposit form. When this happens, Paylogix can automatically send an email to the participant prompting them to update their deposit amount. The participant can then access the Paylogix portal to revise a direct deposit form and submit to payroll. Direct deposit forms are always available to download through the Paylogix client portal.