

Agents access the Required Forms Packet from the Sales Worksite page under section five labeled 'Closing'. Once you click on the file a box will open asking to run or save the program (see screenshot below).



Once the choice is made to either run or save the program, the Worksite Forms Home page will open and the Agent chooses either the Section 125 or Standard Payroll Deduction packet.



The Worksite Advantage Payroll Deduction Billing Information Sheet shown below is the second page of the Required Forms Packet.

WORKSITE ADVANTAGE		Payroll Deduction Billing Information Sheet	
COMPANY INFORMATION			
Name of Company	Franchise #	Phone Number	Fax Number
			Total # Eligible Employees
Company Billing Address	City	State	ZIP
Company Physical Address (if different from billing address)	City	State	ZIP
Billing/Payroll Contact (Person who handles deductions)	Phone Number	Email Address	
Employer/Owner/Decision-Maker	Phone Number	Email Address	
BILLING INFORMATION			
1. Premiums are deducted: (check one)			
<input checked="" type="checkbox"/> weekly (52)	<input type="checkbox"/> bi-weekly	<input type="checkbox"/> semi-monthly	<input type="checkbox"/> monthly
<input type="checkbox"/> weekly (48)			
2. Payments will be sent: (check one)			
<input type="checkbox"/> weekly (52)	<input type="checkbox"/> bi-weekly	<input type="checkbox"/> semi-monthly	<input type="checkbox"/> monthly
<input type="checkbox"/> weekly (48)			
<input type="checkbox"/> every 4 weeks (13 billings per year)	<input type="checkbox"/> semi-monthly (20 bills) gov't/schools	<input checked="" type="checkbox"/> monthly (12 bills - 4/4/5)	
Circle Payroll Deduction Day of the week			
M T W TH F SA SU			
<input type="checkbox"/> 9 monthly (9 bills) gov't/schools			
<input type="checkbox"/> 10 monthly (10 bills) gov't/schools			