

Don't pay too much or too little. Pay exact.

► **Workers' Compensation | Payroll Billing**

Customer Onboarding Guide: SmartPay & Payroll Billing

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Convenient. Easy. Cash flow. That's payroll billing.

Congratulations! You've selected a premium payment option that has benefited 90,000+ of The Hartford's workers' compensation customers.

Whether you elected payroll billing for its convenience, ease, cash flow benefits or all three, you've made the right choice.

This guide is broken down into three sections to help you set up your XactPAY account, SmartPay account, and manage them on an ongoing basis.

1. **Getting Started** walks you through, step by step, how to:

- Register your account
- Choose policy fees payment option
- Enter bank information
- Authorize The Hartford to withdraw premium payments from your account

2. Getting Started with your **SmartPay account** walks you through, step by step, how to:

- Complete the SmartPay [online registration form](#)
- Work with SmartPay and set up your payroll billing data

3. **Managing your account** lets you:

- Update or change your business' account information
- View premium reports

Register your XactPAY account

Once you receive a registration email notification you can register your payroll billing account. Be sure to have the information listed below.

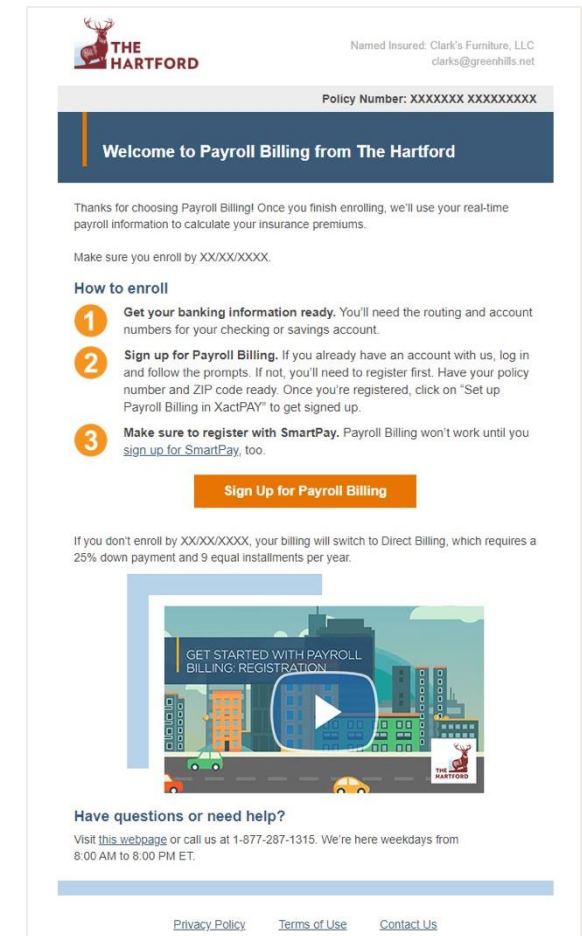
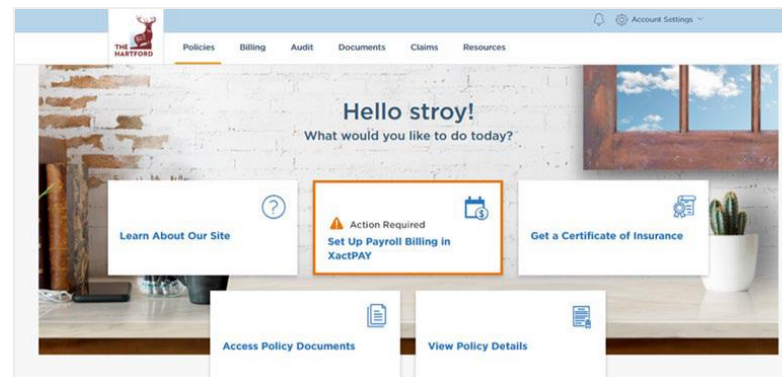
Registration Checklist

- Commercial bank account number
- Commercial bank routing number
- Billing contact name, phone number, email address

1. Begin by clicking the Sign Up for Payroll Billing button that appears in the registration email. If you already have an account for The Hartford's [My Account](#), click **set up payroll billing in XactPAY**, if not, **register** for a new account.

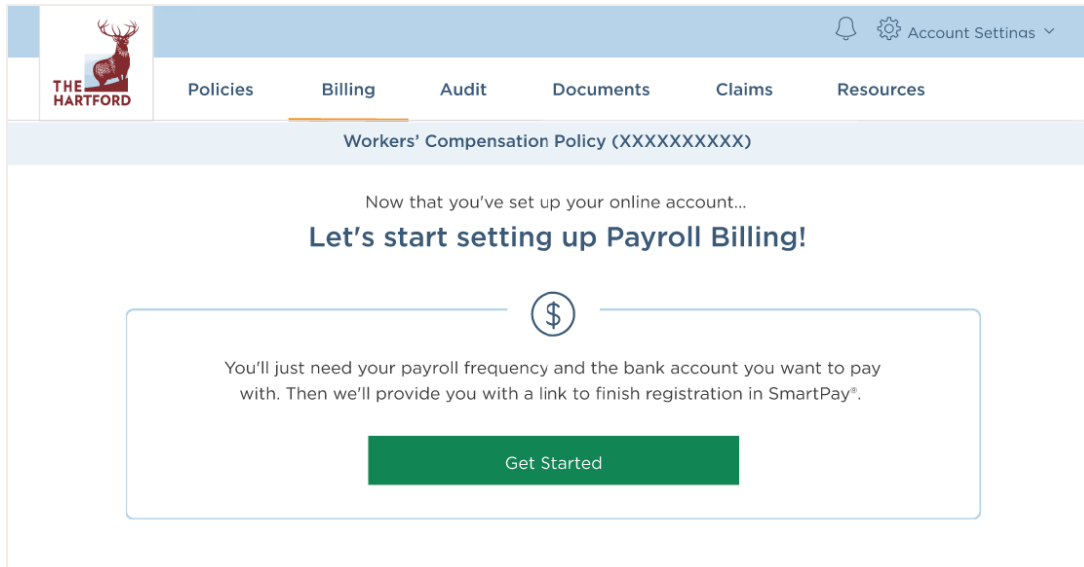
2. Once registration for My Account is completed, you'll be able to finish your XactPAY registration.

3. Make sure to register with SmartPay too! [SmartPay online registration form](#)

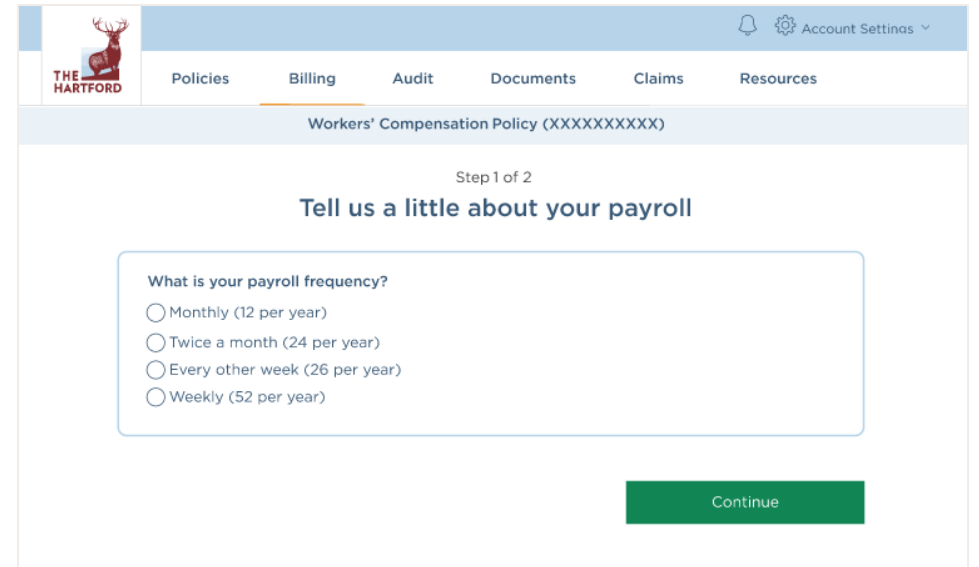


Set up payroll billing

1. Welcome to payroll billing. Click **get started**.
2. Choose how often you want to provide your payroll.
3. Click **continue**.



The screenshot shows the 'Billing' tab selected in the top navigation bar. Below the navigation bar, there is a header for 'Workers' Compensation Policy (XXXXXXXXXX)'. The main content area has a heading 'Let's start setting up Payroll Billing!' and a subheading 'Now that you've set up your online account...'. A box with a dollar sign icon contains the text: 'You'll just need your payroll frequency and the bank account you want to pay with. Then we'll provide you with a link to finish registration in SmartPay®.' A green 'Get Started' button is at the bottom of this box.



The screenshot shows the 'Billing' tab selected in the top navigation bar. Below the navigation bar, there is a header for 'Workers' Compensation Policy (XXXXXXXXXX)'. The main content area has a heading 'Tell us a little about your payroll' and a subheading 'Step 1 of 2'. A box contains the question 'What is your payroll frequency?' and four radio button options: 'Monthly (12 per year)', 'Twice a month (24 per year)', 'Every other week (26 per year)', and 'Weekly (52 per year)'. A green 'Continue' button is at the bottom right.

Set up your payment information

1. Select how you'd like to pay policy fees. Make one full payment or split payments.

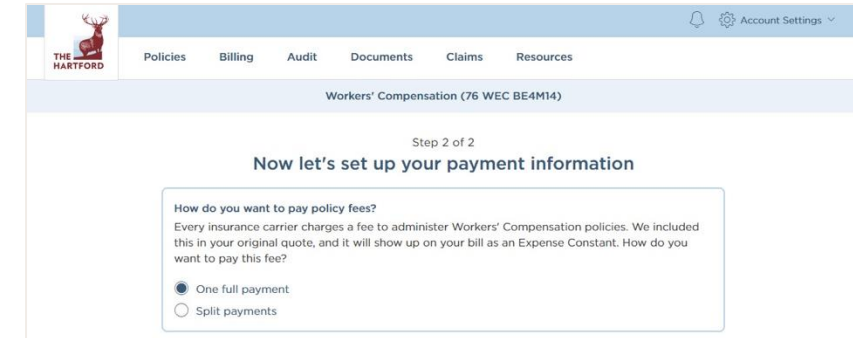
2. Banking information.

- Input the name on the commercial bank account
- Click the appropriate account type
- Input the ABA routing number
- Input the commercial bank account number
- Read and agree to the electronic signature and electronic funds transfer authorizations

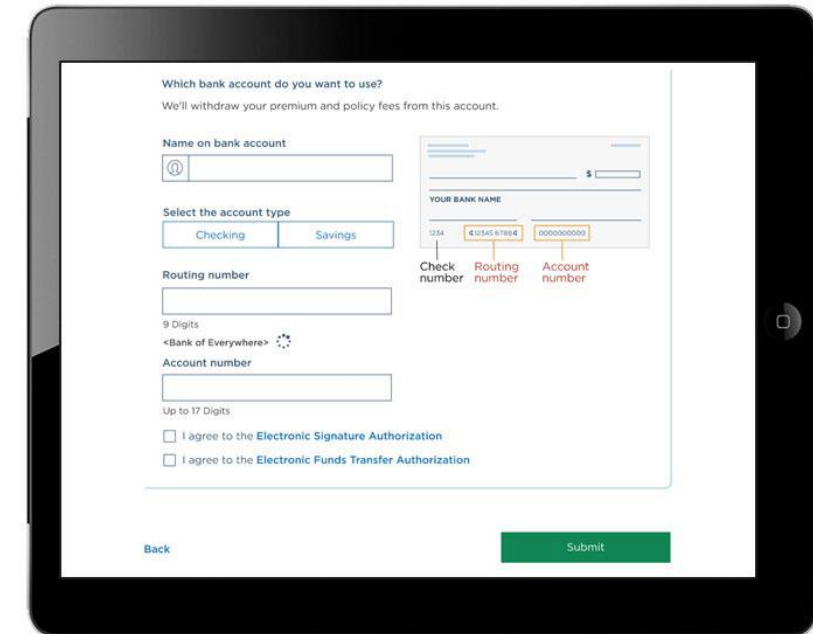
3. Click **submit**.

Did you know?

Providing EFT authorization is convenient and the most secure way to provide The Hartford with the information necessary for self-reported payroll billing.



The screenshot shows the 'Workers' Compensation (76 WEC BE4M14)' page on The Hartford website. It is 'Step 2 of 2' and titled 'Now let's set up your payment information'. A text box explains that an insurance carrier fee is included in the original quote and asks how to pay it. There are two radio button options: 'One full payment' (selected) and 'Split payments'.

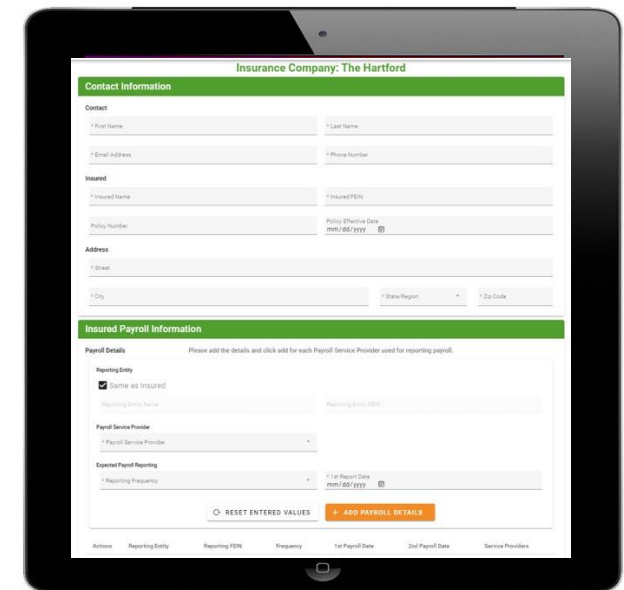
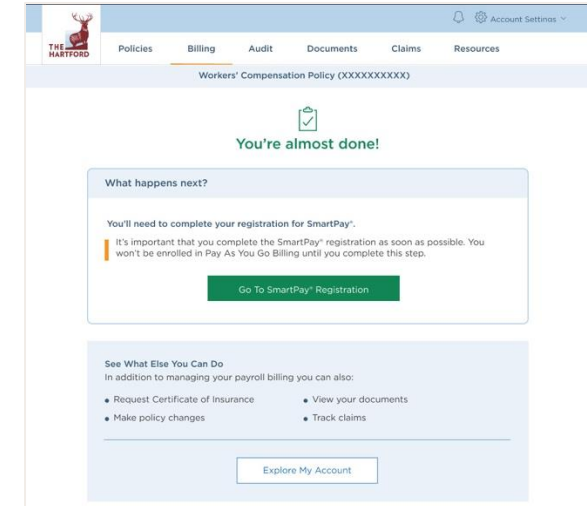


The screenshot shows a tablet displaying a form titled 'Which bank account do you want to use?'. It states 'We'll withdraw your premium and policy fees from this account.' The form includes fields for 'Name on bank account', 'Select the account type' (with 'Checking' and 'Savings' buttons), 'Routing number' (9 Digits), and 'Account number' (Up to 17 Digits). A diagram on the right shows a sample bank account number '1234 56789010 0000000000' with labels for 'Check number', 'Routing number', and 'Account number'. At the bottom, there are checkboxes for 'I agree to the Electronic Signature Authorization' and 'I agree to the Electronic Funds Transfer Authorization', along with 'Back' and 'Submit' buttons.

Getting started with SmartPay

1. After you're done registering for XactPAY, you will find the link to register for SmartPay on your confirmation page. You can also find the link here [online registration form](#).
 - Complete the contact information. Be sure to have your workers' compensation policy number
 - Complete the insured payroll information section
 - Answer the two YES or NO questions in the reporting information section
 - Click the confirmation box and click submit
2. SmartPay will contact you via email to determine the best way to get your workers' compensation report based on your payroll provider. And, they'll help finalize details like payroll frequency.
3. SmartPay then sends your payroll information automatically to The Hartford.
4. Then via XactPAY, The Hartford calculates your premium, emails you the premium owed and withdraws your workers' compensation premium via EFT.

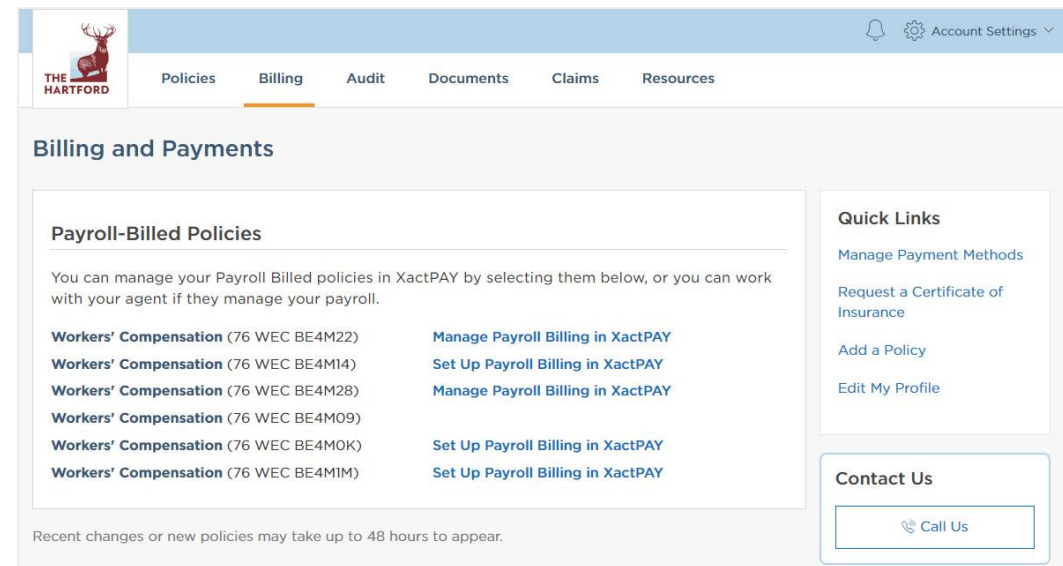
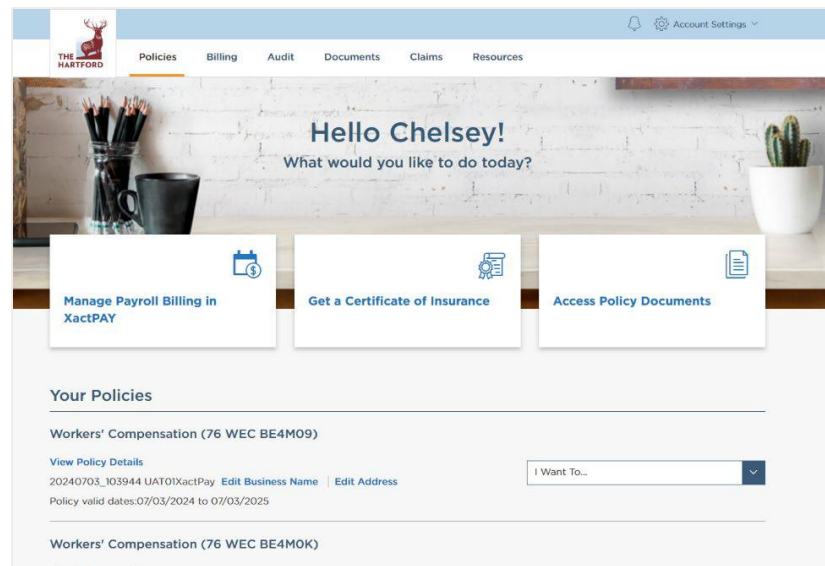
For questions, please contact 877.905.0786 or email us at [SPRS Support](#).



Manage your account

Now that you're registered for payroll billing, you can access your account via My Account.

1. Once you sign in, click **manage payroll billing in XactPAY**.
2. If you have multiple policies, it will bring you to the **policy selection** screen shown. Click the policy you'd like to manage.
3. If you have a single policy, you'll see the home page where you're able to manage your payroll billing account.



Verify employee information

After you've registered and we receive your employee roster and/or classification information from SmartPay:

- Depending on your payroll partner, you'll receive an email to classify your employees and identify your officers.
- After that's completed in XactPAY, you can view a complete list of those employees and officers on the **roster tab**.
- Otherwise, no action is needed. You will be able to review your state and classification information on the roster tab.
- Verify that all employees and/or classifications are listed correctly.

To make any changes, contact The Hartford at 1-877-287-1316.

The screenshot shows the 'Payroll Billing' section for 'Jody's Bakery LLC'. The 'Workers' Compensation (01 WEC AW2FVT)' policy is active from 01/01/2020 to 01/01/2021. The 'Roster' tab is selected, displaying a table of employees. Below the table is a link to 'Designate A New [Officer]'.

Name	Assignment	FEIN
Austen, Jonathon	CT - Clerical Office Employee	*****6789

[Designate A New \[Officer\]](#)

Employee Roster

Name	Assignment	FEIN
Austen, Jonathon	CT - Clerical Office Employee	*****6789
Blumenthal, Jane	CT - Clerical Office Employee	*****6789

This is 'Step 1 of 2' titled 'Assign each person and select each Owner'. It instructs the user to 'Select every Owner, even if they are excluded from coverage.' A note states 'You can assign multiple people at once. [Learn How](#)'. An 'Assign Selected' button is present. The main table lists five individuals with checkboxes for selection, dropdown menus for assignments, and toggle switches for owner selection.

<input type="checkbox"/>	Name	Assignment	Owner selection
<input type="checkbox"/>	BROOKS, LEO	OR - SEALING WAX MFG	<input checked="" type="checkbox"/> Owner
<input type="checkbox"/>	CARTER, ISABEL	OR - LAWN MOWER REPAIR	<input checked="" type="checkbox"/> Owner
<input type="checkbox"/>	MITCHELL, CALEB	OR - SEALING WAX MFG	<input type="checkbox"/>
<input type="checkbox"/>	PATEL, ARIA	OR - LAWN MOWER REPAIR	<input type="checkbox"/>
<input type="checkbox"/>	TURNER, MAXWELL	OR - SEALING WAX MFG	<input type="checkbox"/>

[Skip For Now](#) [Continue](#)

Update your information as needed

- To update your primary email, password or other billing contact information – you'll be redirected to your **My Account profile** by clicking **go to your profile**.
- The **settings** page is where you can manage additional emails for billing notifications or update your banking information.

The screenshot displays the 'Payroll Billing' settings page for 'Jody's Bakery LLC'. The page is part of 'The Hartford' system, as indicated by the logo in the top left. The top navigation bar includes links for Policies, Billing, Audit, Documents, Claims, and Resources. The main content area is titled 'Payroll Billing' and 'Jody's Bakery LLC', with a sub-header for 'Workers' Compensation (01 WEC AW2FVT) 01/01/2020 - 01/01/2021'. Below this, there are tabs for Summary, Reports, Roster, Enter Payroll, and Settings. The 'Settings' tab is currently selected. The settings are organized into three main sections: 1. Billing Contact Information: This section includes 'Billing Notifications' with a list of email addresses (joe-smith@email.com (primary) and firstname.lastname@email.com) and a 'Remove' button. It also has a 'Billing Contact Info' section with fields for Firstname and Lastname. A note at the bottom of this section states: 'Be sure to keep your primary email up to date. It's the only way to access XactPAY and receive updates. To change your primary email or billing contact, go to your Profile.' 2. Payroll Reporting Information: This section includes 'Payroll Frequency' (Monthly (12 per year)) and 'Payroll Reporting' (Grouped by job classification). A note at the bottom states: 'To change your reporting method and frequency, contact us.' 3. Bank Information: This section includes a link to 'Edit' and shows the bank name 'Bank of America' and the account type 'Checking Account'.

Payroll Billing
Jody's Bakery LLC
Workers' Compensation (01 WEC AW2FVT) 01/01/2020 - 01/01/2021

Summary Reports Roster Enter Payroll **Settings**

Billing Contact Information

Billing Notifications
When we withdraw a payment, we'll email:
joe-smith@email.com (primary)
firstname.lastname@email.com [Remove](#)

Billing Contact Info
Firstname Lastname
XXX-XXX-XXXX

Be sure to keep your primary email up to date. It's the only way to access XactPAY and receive updates. To change your primary email or billing contact, [go to your Profile](#).

[Add Another Email](#)

Payroll Reporting Information

Payroll Frequency
Monthly (12 per year)

Payroll Reporting
Grouped by job classification

If by individual:
Separated by individual

To change your reporting method and frequency, [contact us](#).

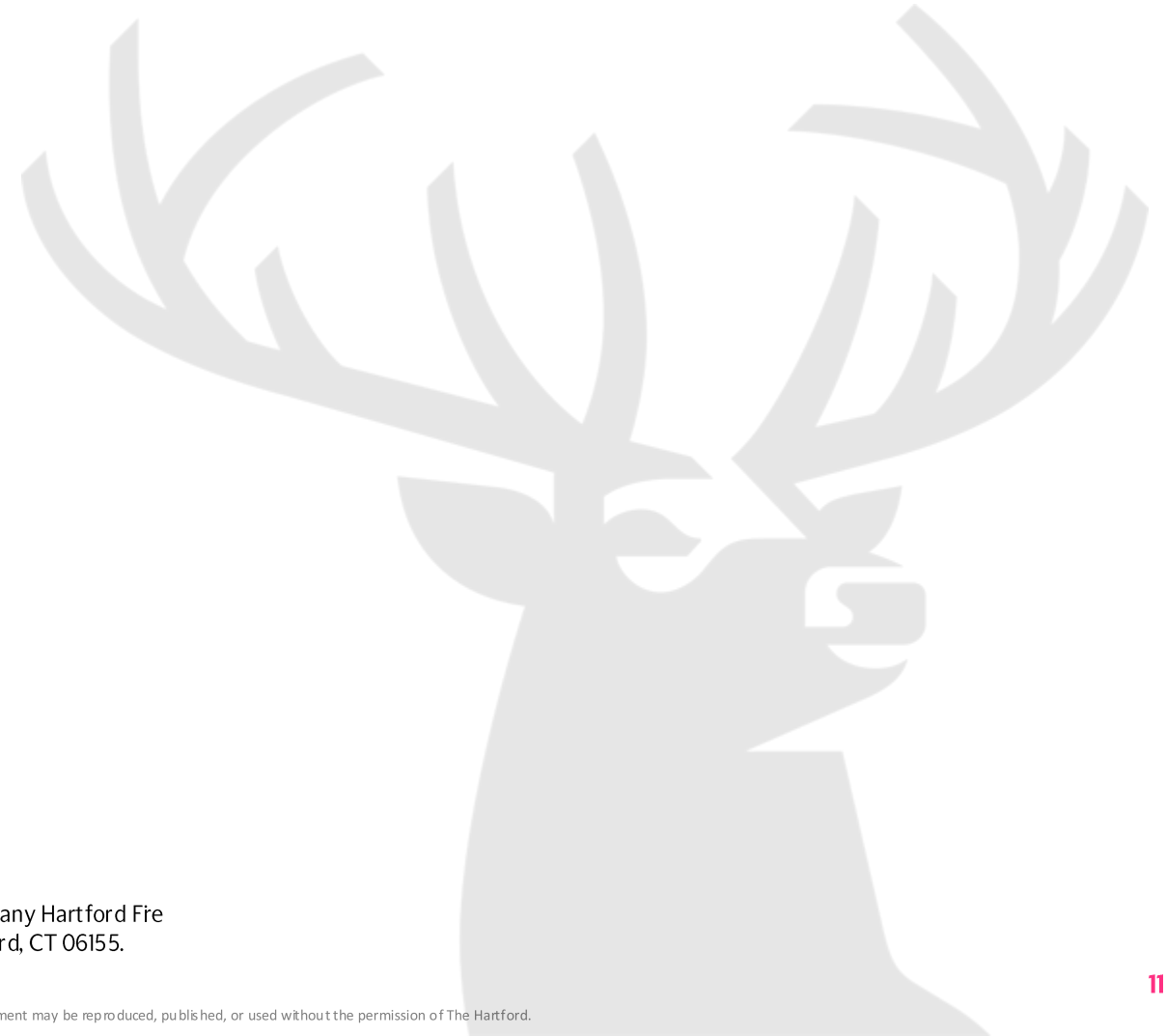
Bank Information [Edit](#)

Bank of America
Checking Account
**** * 1234

Get facts and answers

Contact customer support

1-877-287-1316



The Hartford Insurance Group, Inc., (NYSE: HIG) operates through its subsidiaries, including underwriting company Hartford Fire Insurance Company, under the brand name, The Hartford®, and is headquartered at One Hartford Plaza, Hartford, CT 06155.
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