

SELF-REPORTING (PSR) PLAN

Thank you for choosing the Self-Reporting (PSR) plan. In order to finalize your set-up process, please complete the following steps:

1. **Visit amtrustfinancial.com** to set up your personal username and password. **NOTE:** if you currently have a username and password with AmTrust for another policy or product line, use your existing username and password to access your PSR policy. You will still need to complete steps 2 through 7.
2. Provide a secondary email address in the Insured Info section **(required)**.
 1. Please click on the icon below **View Policy**, to the right of your policy number
 2. Please enter the secondary e-mail address in the box next to Add/Delete Additional E-mail and Click Save.
3. Setup your direct debit. Enter your bank account information in the online EFT form located on the Register Direct Debit page. All future payments including the \$200.00 premium bearing deposit will be drafted from the account entered.
 1. Please review and accept the terms and agreement.
 2. Click **Register** to the left of your policy number
 3. Enter the name as it appears on your bank account. Enter the Routing number, Account number, and the e-mail address where you would like your payment confirmations sent. Click Save
4. Finalize your PSR Online Payment Process
 1. Please Click on Make PSR Payment.
 2. Select your policy number from the drop-down box
 3. Click Start Initial Setup.
5. Enter current method for payroll processing (i.e. Intuit/QuickBooks, payroll software being used, CPA firm or name of payroll provider). This information is used for internal tracking only. It is important that we note the actual method used.
6. Review and confirm your preferred payment frequency.
 1. Once you have confirmed your payment frequency, you are ready to set up your payroll check dates.
 - ✓ For weekly and bi-weekly, please select your next check date.
 - ✓ For semi-monthly, please select your next two check dates
 - ✓ For monthly, please note that your payment due date will be the 10th of each month, for the prior month's payroll.
 2. Click continue to review the information you entered
 3. A one-time change to your payment frequency is allowed at this time, if needed. This **must** be done prior to making your required \$200 premium bearing deposit (applied at 1st year's audit). Subsequent changes will require a policy endorsement. Please send requests to: **PSR@amtrustgroup.com**
7. Make your \$200 deposit
8. You are now set up and ready to report. Please remember to visit **www.amtrustfinancial.com** when you are ready to submit your first payroll due.
 1. Simply login, click Make PSR payment, select your due date or check date from the drop-down box and enter your gross payroll figures.
 2. Please **Note:** you can make changes to your email addresses on the **My Profile** page.