

# Payment Plan Request

## **Can I request a Payment Plan if I owe on my account?**

Yes, you can request a Payment Plan if you owe on your account and need to make payments to pay tax, penalties, and interest.

Depending on the terms of the agreement, the payment plan will be auto-approved or manually approved or denied by DLI staff.

Please see “How do I request a Payment Plan if I owe on my account?” for more instructions on how to complete this request.

## **How do I request a Payment Plan if I owe on my account and want to be auto-approved?**

If you have “FULL” access to this eServices account

1. Log into *UI eServices for Employers*
2. Click into the account you want to request the Payment Plan
3. Click the “Account Services” tab
4. Click the “Financials” tab
5. Click the “Payment Plan Request” link
  - a. Choose “Payment Type” as “Electronic Payments”
  - b. Choose the first payment date between 5-30 days of today’s date
  - c. Type a “Down Payment Amount” if you’d like to make a down payment (Optional)
  - d. Enter a “Down Payment Date” (Required if Down Payment Amount is entered)
  - e. Choose “Number of Installments” or an “Installment Amount”
    - i. Number of Installments
      1. Must be within 12 months to get auto-approval of the Payment Plan
      2. The number you choose from the drop-down box will divide the estimated amount owing by the number of months you’d like to make payments. This will show your estimated amount due.
    - ii. Installment Amount
      1. Must be at least \$50 per month to get auto approval of the Payment Plan
      2. The number you type in will be divided into the estimated amount owing and show you the amount of months it will take to pay off the debt. If the number of months is over 12, the plan will not be auto-approved.

# Payment Plan Request

Number of Installments within 12 months

**PPL WEB REQUEST**

## Web Payment Plan Request

To setup a payment plan you will need to choose one of two options:

1. Pick how many installments you would like to make  
----- OR -----
2. Pick your desired installment amount  
\_\_\_\_\_

When you select one of the two options, a box will display below your selection to give you either a estimated number of installments or estimated installment amount. These are ESTIMATED numbers because these calculations do not include interest. If the estimated numbers are acceptable, you can submit a official request and you will receive a response with interest included.

**Current Balance:** \$ 1,520.69

Payment Type:  First Payment Date\*:

\* To allow time for processing, the start date must be more than 5 business days from today.

Optional Choices:

Down Payment Amount:  Down Payment Date:

Required Choices:

Number of Installments:  OR Installment Amount:

Monthly Payment:

**Get Auto Approval...**

Do you want your Payment Plan to receive automatic approval? Make sure your selections are within these constraints and the payment plan will be processed automatically without requiring review from a collector.

- Electronic Payment (ACH Debit)
- Start Date: Within 30 Calendar days
- 12 or less monthly installments
- Monthly Payments of \$50 or more

**Qualifies for Auto Approval**

**REMINDER:** These estimated amounts do not include monthly interest calculation. The inclusion of interest may result in a slightly higher monthly installment or additional installments.

# Payment Plan Request

Installment Amounts requiring 12 months or less to pay off debt

**PPL WEB REQUEST**

## Web Payment Plan Request

To setup a payment plan you will need to choose one of two options:

1. Pick how many installments you would like to make  
----- OR -----
2. Pick your desired installment amount  
\_\_\_\_\_

When you select one of the two options, a box will display below your selection to give you either an estimated number of installments or estimated installment amount. These are ESTIMATED numbers because these calculations do not include interest. If the estimated numbers are acceptable, you can submit an official request and you will receive a response with interest included.

**Current Balance:** \$ 1,520.69

Payment Type: Electronic Payments | First Payment Date\*: Feb 14, 2014

\* To allow time for processing, the start date must be more than 5 business days from today.

Optional Choices:

Down Payment Amount: 0.00 | Down Payment Date:

Required Choices:

Number of Installments:  | OR | Installation Amount: 150.00  
Installments: 10.14

**Get Auto Approval...**  
Do you want your Payment Plan to receive automatic approval? Make sure your selections are within these constraints and the payment plan will be processed automatically without requiring review from a collector.  

- Electronic Payment (ACH Debit)
- Start Date: Within 30 Calendar days
- 12 or less monthly installments
- Monthly Payments of \$50 or more

**Qualifies for Auto Approval**

**REMINDER:** These estimated amounts do not include monthly interest calculation. The inclusion of interest may result in a slightly higher monthly installment or additional installments.

Submit Cancel

- f. Click "Submit"
- g. View and/or print confirmation page. A web message will be sent to your eServices account with the confirmation details contained on this page.

**Note:** Because the Payment Plan is auto-approved, you'll receive an email to your preferred eServices email account requesting further steps to approve the Payment Plan.

6. Following the instructions from the email and web message
  - a. Click into the "Requests" tab within your eServices account
  - b. Under the "Waiting to be Processed" tab, click the Confirmation # on the request titled "Your Approved Payment Plan"

**Note:** If you do not want to continue with this agreement, click the "Cancel Request" tab at the top of the screen.

- c. Click the "Change" tab

# Payment Plan Request

- d. Read the Payment Plan Agreement Details
- e. If the details of the agreement are agreeable
  - i. Click the box to view the "Full Payment Schedule" (optional)
    - 1. If you click this box, the "Payment Schedule" tab will be available at the top of the page to view the monthly installment amounts.

PPL WEB REQUEST		PAYMENT SCHEDULE				
Installment	Due	Starting Bal	Installment	Interest	Penalty	Ending Bal
1	Feb 14, 2014	1,520.69	150.00	0.00	0.00	1,370.69
2	Mar 14, 2014	1,370.69	150.00	11.77	0.00	1,232.46
3	Apr 14, 2014	1,232.46	150.00	9.52	0.00	1,091.98
4	May 14, 2014	1,091.98	150.00	7.27	0.00	949.25
5	Jun 16, 2014	949.25	150.00	5.02	0.00	804.27
6	Jul 14, 2014	804.27	150.00	2.77	0.00	657.04
7	Aug 14, 2014	657.04	150.00	0.52	0.00	507.56
8	Sep 15, 2014	507.56	150.00	0.00	0.00	357.56
9	Oct 14, 2014	357.56	150.00	0.00	0.00	207.56
10	Nov 14, 2014	207.56	150.00	0.00	0.00	57.56
11	Dec 15, 2014	57.56	57.56	0.00	0.00	0.00

- ii. Enter your Name in full
- iii. Enter your banking information
- iv. Check the box authorizing your consent to the agreement
  - 1. You can print this page and the installment breakdown by using the print option within the Internet browser you are using
- v. Click "Submit"
- vi. View or print confirmation page

# Payment Plan Request

<b>Plan Amount:</b>	\$ 1,520.69		
Payment Type	First Payment Date	Plan Installments	
Electronic Payments	Feb 14, 2014	11	
Down Payment Amount	Down Payment Date	Installment Amount	
0.00		150.00	
<input checked="" type="checkbox"/> Show Me the Full Payment Schedule in a tab above			

I,

promise to pay the Montana Unemployment Insurance Contributions Bureau the Current Balance listed above, plus interest in accordance with the Payment Agreement detailed above. The balance owed is the result of one or more outstanding quarterly UI tax payments. Please consult your Statement of Account for details. Interest will continue to accrue on the unpaid taxes unless prior arrangements have been made.

I understand and agree this payment agreement is being authorized by me in consideration for the refrainment of collection actions on the debt. Unless stipulated as part of the agreement, the Montana Unemployment Insurance Contributions Bureau agrees not to pursue further legal action to collect the debt if: (1) payments are made as called for by this agreement; and (2) future quarterly wage reports are filed and paid in a timely manner. I understand this agreement does not prevent the assignment of a penalty tax rate based on having past due amounts.

I understand if I fail to make on time payments as called for by the agreement, I will be subject to legal action to collect the unpaid portion of the debt, plus penalty and interest, and I may incur other legal costs in the process.

As part of this agreement, I have authorized the Montana Unemployment Insurance Contributions Bureau to deduct the monthly Installment Amount listed above from the bank account listed below. Payments will be deducted on the same day of each month (or the next business day if the payment date lands on a non-banking day) corresponding to your First Payment Date. You will continue to receive monthly statements; your final statement will include amounts for updated interest calculations.

Bank Account Type	Routing Number	Account Number	Confirm Account Number
Checking	041000014	12345	12345
FEDERAL RESERVE BANK			

*By checking this box, I am indicating my consent to the above agreement in full.*

## How do I request a Payment Plan if I owe on my account and don't want to follow the constraints of an auto-approval plan?

If you have "FULL" access to this eServices account

1. Log into *UI eServices for Employers*
2. Click into the account you want to request the Payment Plan
3. Click the "Account Services" tab
4. Click the "Financials" tab
5. Click the "Payment Plan Request" link
  - a. Choose a "Payment Type"
  - b. Choose the first payment date 30-90 days of today's date
  - c. Type a "Down Payment Amount" if you'd like to make a down payment (Optional)
  - d. Enter a "Down Payment Date" (Required if Down Payment Amount is entered)
  - e. Choose "Number of Installments" or an "Installment Amount"
    - i. Number of Installments
      1. Can be within 13-36 months

# Payment Plan Request

ii. Installment Amount

1. Must be at least \$50 per month but this can extend the Payment Plan out to 36 months

f. Enter a "Note"

**Current Balance:** \$ 1,520.69

Payment Type:  First Payment Date\*:

\* To allow time for processing, the start date must be more than 5 business days from today.

Optional Choices:

Down Payment Amount:  Down Payment Date:

Required Choices:

Number of Installments:  OR Installment Amount:

Monthly Payment:

**This Plan Will  
Require Review  
From a Collector**

**REMINDER:** These estimated amounts do not include monthly interest calculation. The inclusion of interest may result in a slightly higher monthly installment or additional installments.

Notes:

The criterion you have selected above will require a collector to review your account before it can be approved.

To aid us in the process, please fill in the box below with:

1. A description of why you have requested the above settings. (e.g. Extenuating circumstances, limited income, etc)
2. A phone number where we can contact you.

I am unable to pay the entire amount due to extenuation circumstances. My mother has been in the hospital and I needed to pay some of her medical bills to allow her to continue to get care, but I would really like to pay my balance due.

g. Press "Submit"

**Note:** You'll receive an email to your preferred email account as well as a web message to your eServices account to complete the final approval steps if the plan is approved.

6. Following the instructions from the email and web message
  - a. Click into the "Requests" tab within your eServices account
  - b. Under the "Waiting to be Processed" tab, click the Confirmation # on the request titled "Your Approved Payment Plan"

**Note:** If you do not want to continue with this agreement, click the "Cancel Request" tab at the top of the screen.

# Payment Plan Request

- c. Click the “Change” tab
- d. Read the Payment Plan Agreement Details
- e. If the details of the agreement are agreeable
  - i. Click the box to view the “Full Payment Schedule” (optional)
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As part of this agreement, I have authorized the Montana Unemployment Insurance Contributions Bureau to deduct the monthly Installment Amount listed above from the bank account listed below. Payments will be deducted on the same day of each month (or the next business day if the payment date lands on a non-banking day) corresponding to your First Payment Date. You will continue to receive monthly statements; your final statement will include amounts for updated interest calculations.

Bank Account Type	Routing Number	Account Number	Confirm Account Number
Checking	041000014	12345	12345
FEDERAL RESERVE BANK			

**By checking this box, I am indicating my consent to the above agreement in full.**

**Note:** You may also receive an email and web message stating that the "Payment Plan agreement was Approved with Changes or Denied". If the plan is "Approved with Changes", follow the same steps to complete the approval process. If you were "Denied", please see the web message describing why the plan wasn't accepted.