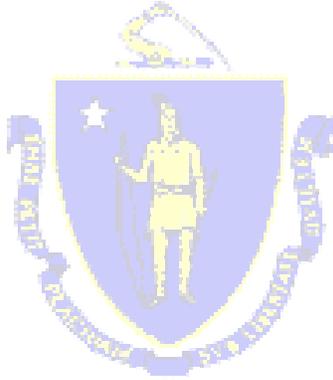


Massachusetts



Payment Intercept Program

Department of Revenue

PIP User Guide

For Public Retirement Boards

TABLE OF CONTENTS

LOG IN PAGE	3
HOME PAGE	4
MENU BAR	5
Menu Option Descriptions	5
LOOKUP MENU	6
Perform Lookup	6
Your Lookup History	7
Perform Lookup Page	8
When There is a Match	10
Additional Information	10
ACCOUNT MANAGEMENT MENU	13
Account Management Options	13
Your Profile	13
Change Password	14
PIP MASTER ADMINISTRATOR (PMA) ONLY OPTIONS	14
View Users (PMA Option Only)	14
Company Profile (PMA Option Only)	15
REPORTS (PMA OPTION ONLY)	16
Lookup History Report	16
PASSWORD RESET (PMA ONLY)	17
Forgot Password Page	17
MADOR AGENCY INFORMATION	19

Log In Page

The screenshot shows the Mass.gov website interface for the Payment Intercept Program. At the top left is the Mass.gov logo with navigation links: home, online services, agencies, elected officials, and help. The top right identifies the page as 'Mass Dept of Revenue Payment Intercept Program' and includes the state seal. On the left side, there are three links: 'New Company Registration Request', 'Forgot Password', and 'Check on my request status'. The central area features a login form with the instruction 'Enter your User Name and Password below.' It contains two input fields for 'User Name' and 'Password', with a note that 'Password is case-sensitive'. A 'Log In' button is positioned below the password field. To the right of the login form is a 'GET HELP' section with a sub-link for 'Payment Intercept Program Help'. The footer contains the copyright notice '©2005 Massachusetts Department of Revenue Version=1.0.1957.15175' and links for 'privacy policy' and 'terms of use'.

User Name: Enter your assigned User Name.

Password: Enter your personal Password. Passwords are case sensitive.

? **GET HELP:** Use this link to review on-line PIP Guide, Frequently Asked Questions (FAQ's), and review information about the Payment Intercept Program.

Links (for use only by PIP Master Administrator)

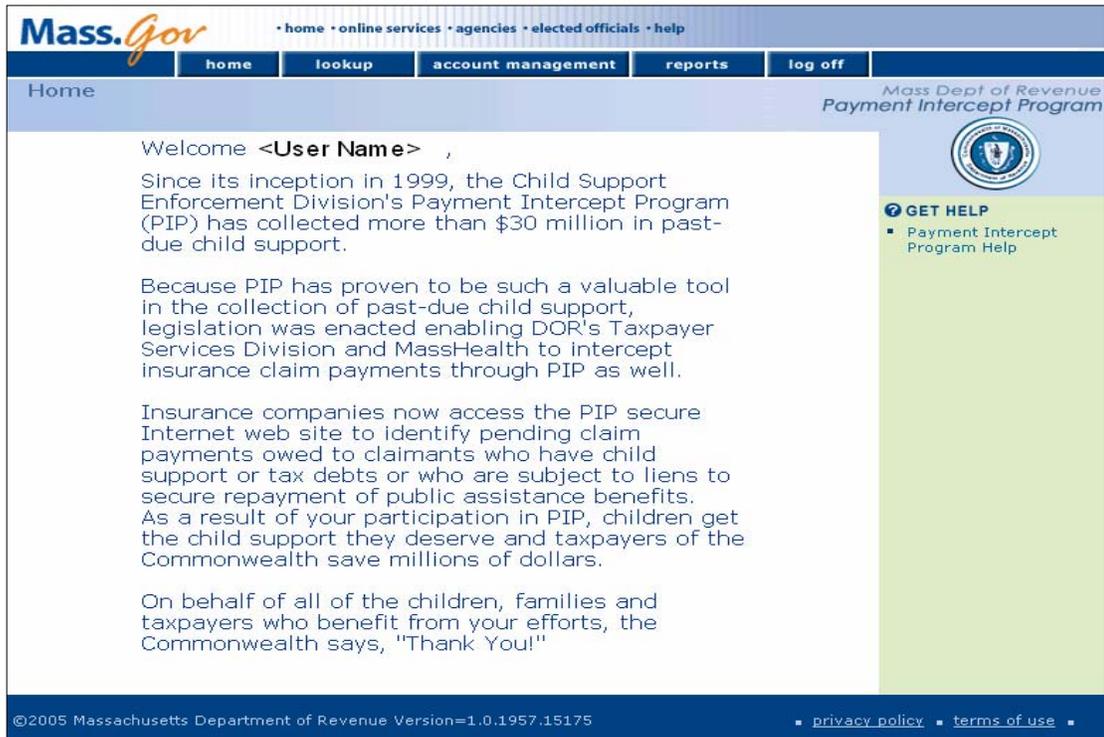
New Company Registration Request: Used only for a public retirement board that is not currently registered to use the PIP web site and wants to register.

Forgot Password: Used by a registered board's PIP Master Administrator (PMA) to have his or her password reset by DOR when the board has only one registered PMA. All other users can contact a PMA within their board to have their password reset by the PMA

Check on My Request Status: Use this link to check on your new registration submission or to check on the forgot your password submission.

Home Page

Once your User Name and Password are verified, you will see the PIP Home page. The Home page includes PIP's message area, which we will use to keep all users about the program. DOR will periodically update this with new information.



The screenshot shows the Mass.gov website interface for the Payment Intercept Program. At the top, there is a navigation bar with the Mass.gov logo and links for home, online services, agencies, elected officials, and help. Below this is a secondary navigation bar with links for home, lookup, account management, reports, and log off. The main content area is titled "Home" and features a welcome message for a user, followed by three paragraphs of text explaining the program's history and purpose. On the right side, there is a "GET HELP" section with a link to "Payment Intercept Program Help". The footer contains copyright information for the Massachusetts Department of Revenue and links to privacy policy and terms of use.

Mass.gov • home • online services • agencies • elected officials • help

home lookup account management reports log off

Home Mass Dept of Revenue
Payment Intercept Program

Welcome <User Name> ,

Since its inception in 1999, the Child Support Enforcement Division's Payment Intercept Program (PIP) has collected more than \$30 million in past-due child support.

Because PIP has proven to be such a valuable tool in the collection of past-due child support, legislation was enacted enabling DOR's Taxpayer Services Division and MassHealth to intercept insurance claim payments through PIP as well.

Insurance companies now access the PIP secure Internet web site to identify pending claim payments owed to claimants who have child support or tax debts or who are subject to liens to secure repayment of public assistance benefits. As a result of your participation in PIP, children get the child support they deserve and taxpayers of the Commonwealth save millions of dollars.

On behalf of all of the children, families and taxpayers who benefit from your efforts, the Commonwealth says, "Thank You!"

GET HELP

- Payment Intercept Program Help

©2005 Massachusetts Department of Revenue Version=1.0.1957.15175 [privacy policy](#) [terms of use](#)

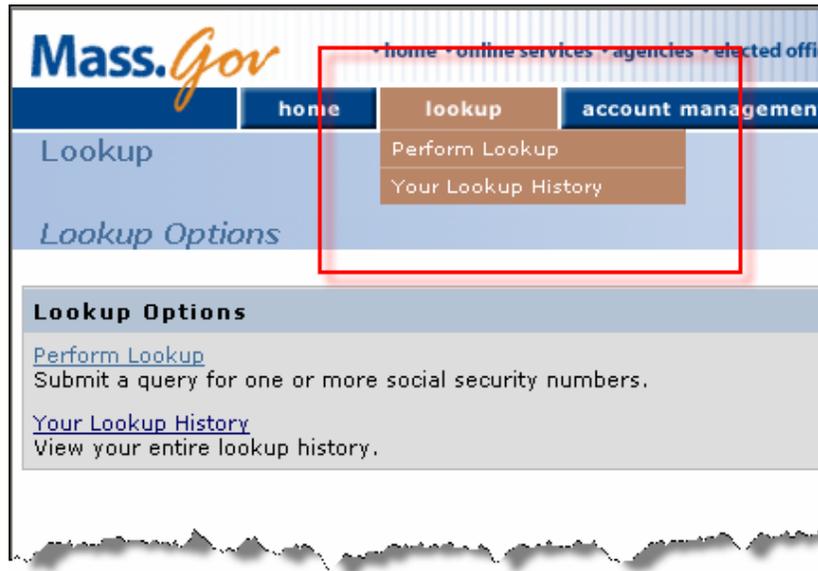
Menu Bar

home	lookup	account management	reports	log off
	Perform lookup	Your Profile	Lookup History Report	
	Your lookup history	Change Password		
		View Users		
		Company Group Profile		

Menu Option Descriptions

Menu Item	Description
home	PIP Home Page: Find out information about PIP.
lookup	Perform Lookup: Submit a query for one or more SSN. Your Lookup History: View your lookup history.
account management	Your Profile: View and change your personal information. Change Password: Change your password. View Users: (<i>PMA Option Only</i>) View all user accounts for your company and perform administrative tasks relating to accounts. Company Group Profile: (<i>PMA Option Only</i>) View, edit, and add company information.
reports	Lookup History: (<i>PMA Option Only</i>) Cumulative report of all lookups performed by your company's PPA and PMA's.
log off	PIP Log off: Click to log off the PIP site.

Lookup Menu



Lookup Menu Options Descriptions

Perform Lookup: The Perform Lookup page is where users enter Social Security numbers (SSN) of retirement board members to determine whether there is a match with data from DOR's Child Support Enforcement Division.

Lookup Social Security Number

Enter one or more social security numbers. Separate each social security number with a comma.

Social security numbers may contain dashes, but are not required. For instance, XXX-XX-XXXX and XXXXXXXXXX are both acceptable forms.

Social Security Number(s)

Submit

Your Lookup History: Page where you can review all the Social Security numbers you have submitted through the PIP site. The LookUp History list is presented from the newest to oldest lookups.

Lookup History Pay

[Search by Date Range](#) [Search Lookups by SSN](#) [Search by Claim Number](#)

Social Security Number Search

Do not use to perform new lookups.

Social Security Number

Most recent searches are shown first.

<Previous [Next](#)>

		Documents
11111111 1/18/08 10:00A Mismatch?	Name, Test Child Support	Match

Perform Lookup Page

This is where you actually enter Social Security numbers (SSN's) of retirement board members to determine whether there is a match with data from DOR's Child Support Enforcement, DOR's Taxpayer Services Division and MassHealth.

Social Security Number Format: Enter one or more SSN in the Social Security number(s) text box. Dashes within each SSN are acceptable but not required. If entering more than one SSN, you must use commas to separate each SSN.

Example: 111111111,222222222,333333333,444-44-4444

Submitting SSN's for Lookup: After you enter the SSN's, click on the <Submit> button to begin the lookup process.

Lookup Social Security Number

Enter one or more social security numbers. Separate each social security number with a comma.

Social security numbers may contain dashes, but are not required. For instance, XXX-XX-XXXX and XXXXXXXXX are both acceptable forms.

Social Security Number(s)

Search Results will display as one of the following:

- **No Match** - Agency does not have a lien for anyone associated with the submitted SSN.
- **Match** (Color will be green if a match)- Agency has a lien for individual with the name and submitted SSN.
- **Incomplete:** Search not complete because user did not enter required information.

The screenshot shows the Mass.gov website interface. At the top, there is a navigation bar with the Mass.gov logo and links for home, online services, agencies, elected officials, and help. Below this is a secondary navigation bar with buttons for home, lookup, account management, reports, and log off. The main content area is titled "Lookup Results" and displays a search result for SSN 111111111. The result includes the date and time of the lookup (1/18/08 10:00A), a link for "Mismatch?", and a table of results. The table has columns for "Name, Test", "Agency Name", and "Match". The "Match" column shows the word "Match" in green. A callout box points to the "Match" column with the text "Match, No Match, or Incomplete result". Another callout box points to the "Name, Test" column with the text "Search Results Name associated with SSN or, * Not on File *". A third callout box points to the SSN and date/time information with the text "SSN entered will appear here along w/ Date &* Time of Lookup".

Mass.gov

• home • online services • agencies • elected officials • help

home lookup account management reports log off

Lookup Results

111111111

1/18/08
10:00A

[Mismatch?](#)

Name, Test	Agency Name	Match
Child Support		Match

Documents

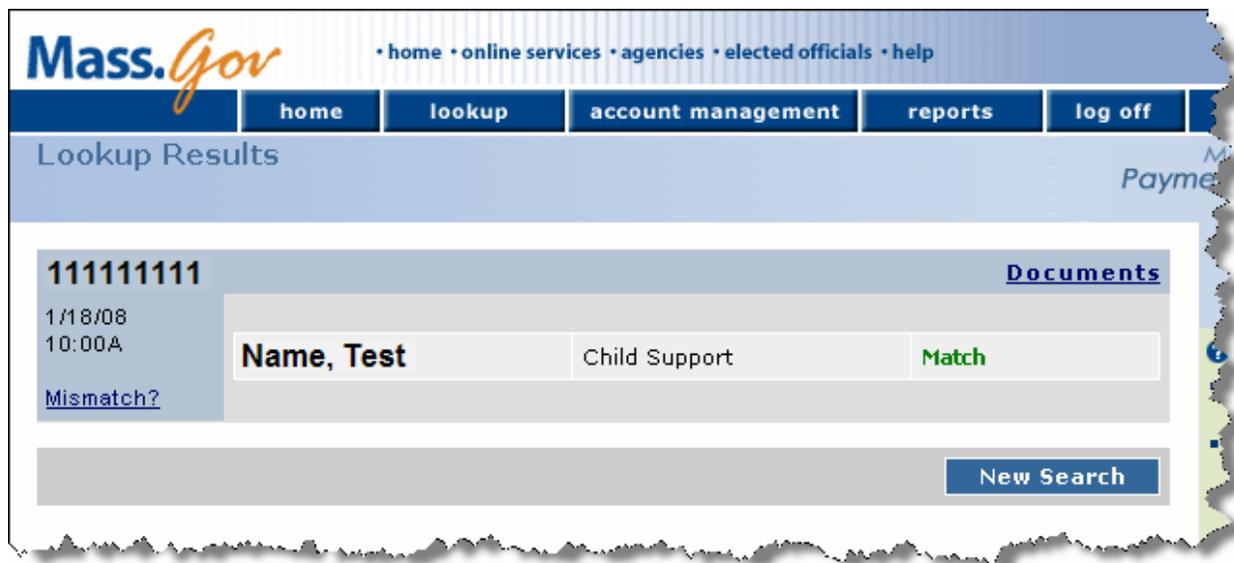
Match, No Match, or Incomplete result

Search Results
Name associated with SSN or, * Not on File *

SSN entered will appear here along w/ Date &* Time of Lookup

When There is a Match

- If Child Support shows “Match” for a submitted SSN, you will have to follow these steps:



- Click the “Documents” Link at the top of the LookUp Result for that SSN.
- Complete the Additional Information page (see Instructions below).
- Click the <Save and Print > button located at the bottom of the Additional Information page.
- Print the Child Support documents using the printer icon or by selecting the File\Print option on your browser’s menu bar.

Documents

- If the “Documents” link is visible on a LookUp Result, it means you must provide additional information to complete the LookUp.
- The documents link will only appear in the event of a match.
- Clicking on “Documents” will bring you to the Additional Information page.

Additional Information

NOTE: Users only have to complete the Additional Information page when a submitted SSN matches a SSN in DOR’s data base.

Instructions: You must complete all fields that are not shaded. Fields marked with an asterisk * are **mandatory** fields

If any mandatory field(s) entry is left blank, the web site will alert you to complete the missed field. All fields are mandatory. Exceptions: the 2nd address line and the Zip Plus 4 field for enhanced zip code delivery.

The following explains what each field is and how to complete the field.

Attorney Involved?	NO is the default value. Select Yes if an attorney is involved.
Total Amount Due	Auto-filled by PIP. Represents total child support owed.
Total Settlement Amt*	Enter the gross refund payout, without any deductions.
Attorney Information: Attorney information is necessary only if Yes is selected above.	
Claimant Information	
Social Security Number	Auto-filled by PIP.
Address	Enter the member's street address.
City*	Enter city or town.
State* / Zip*	Select state from listing then enter the Zip Code. If known, also enter the Zip + 4 value.

Attorney Involved?* Yes No

Total Amount Due \$X.XXX.XX

Total Settlement Amt*

Attorney Information

Firm or Attorney Name*

Address*

City*

State* / Zip Code* MA -

Attorney Phone*

Claimant Information

Social Security Number 111111111

Address*

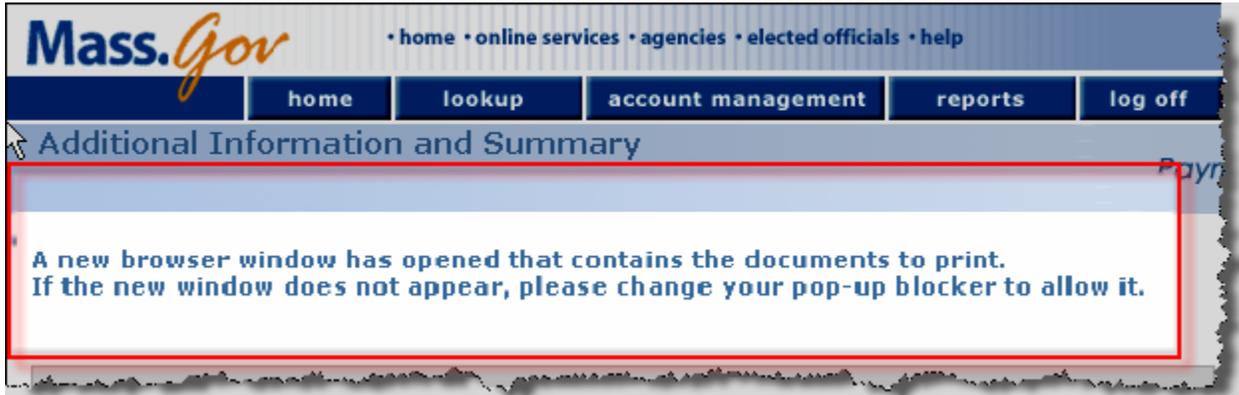
City*

State* / Zip Code* MA -

Printing Documents

Once you complete the Additional Information page, click on <**Save and Print**> button located at the lower right hand side of the page. An new window will open displaying the lien documents.

Note:



- You may encounter a windows POPUP question bar. If yes, right click the popup bar and select the option “Always allow popup's from this site.”
- Print the Child Support documents using the printer icon or by selecting the File\Print option on the Menu bar.
- Mail the member a copy of the Notice of Levy and the Notice of Intercept.

Funds must be disbursed by Retirement Boards in the following priority:

1. Federal tax withholding required by law.
2. DOR’s Child Support Enforcement Division (up to the amount of the child support lien).
3. The retirement board member.

Note: When sending a check to DOR, you should:

- ✓ Make the check payable only to the Commonwealth of Massachusetts.
- ✓ Include the Social Security number of the retirement member on the check, and,
- ✓ Include a copy of the Notice of Lien and Levy with the check.

Account Management Menu

Account Management Options

Site options allow all users to:

- ✓ View and edit their profile
- ✓ Change their password

In addition to the above, PMA-only options include:

- ✓ View Users
- ✓ Company Profile

account management
Your Profile
Change Password
View Users
Company Group Profile

Your Profile

View and change your personal account information.

Important: Make sure to keep your e-mail address current as many PIP functions rely on automated e-mails to users.

Your Personal Account Information

User Name

First Name

Last Name

Title

Phone Number

Email Address

Secret Question (in case you forget your user name or password)

Secret Answer

Change Password

You can change your password at any time but any new password must comply with all of the following rules. Your new password must:

- Be between 8 and 15 characters in length Password example - (e.g., **Testing1**)
- Include at least 1 UPPER CASE LETTER, **NOTE: Passwords are case sensitive.**
- Include at least 1 lower case letter, and
- Include at least 1 numeric value.

Change Password

Account Management > Change Password

Passwords must be between 8 and 15 characters, have at least 1 upper case letter, 1 lower case letter, and 1 digit. (e.g., *Example1*)

New Password

Confirm New Password

Save **Cancel**

PIP Master Administrator (PMA) Only Options

View Users (PMA Option Only)

Any PMA can use the “View Users” option to add, edit, de-activate, and reset passwords for PPA and PMA users.

- Clicking the <Select> button next to a user names allow you to edit or deactivate the account or to reset the password for that user.
- Clicking the <Create> button at the bottom of the page brings you to the page to create a new account for a new user.

User List for Company Group: Insurance Agency

	User Name	Last Name	First Name	Role
Select		Marotta	InsuranceMaster	MasterAccount
Select		Insurer01	Insurer01	PayerAccount
Select		O'Neill	Dolly	PayerAccount
Select		Marotta	B	PayerAccount

Create **Cancel**

Company Profile (PMA Option Only)

A PMA can use the “Company Profile” option to edit information about your retirement board.

Type: Select **Pension** from the drop down list. The type selected determines which agencies your data match will match against.

The screenshot shows a web form titled "Details" with a light blue header. The form contains several input fields and buttons. The fields are arranged in two columns. The left column contains: "Name" (text input), "Type" (dropdown menu), "Address Line 1" (text input), "City" (text input), and "State" (dropdown menu showing "MA"). The right column contains: "Date Deactivated (NOT SET)" (text input), "Fax" (text input), "Address Line 2" (text input), "Zip" (text input), and "PlusFour" (text input). At the bottom of the form, there are four buttons: "Save", "Deactivate", "View Company List", and "Cancel".

Click the <Save> button to save whatever changes you entered on the Details page.

Click the <Deactivate> button to deactivate your board.

Reports (PMA Option Only)

reports
Lookup History Report

Lookup History Report

A PMA can review SSN lookups done by all his or her board's users.

When the Lookup History drop down option is selected the following option is displayed:

When all fields are completed, click the <Submit> button.

The screenshot shows the 'Lookup History Report' form with the following fields and callouts:

- User Name:** A text input field with a callout box stating: "Enter a valid **User Name** for your board that you want to review".
- Begin Date:** A date picker field with a callout box stating: "Enter the date you want the Lookup History Report to BEGIN".
- End Date:** A date picker field with a callout box stating: "Enter the date you want the Lookup History Report to END".
- Buttons:** 'Submit' and 'Cancel' buttons are located at the bottom right of the form.

The box gives User Name and date range you submitted. Below this, a list of all lookups performed by the user for the specified date range.

The Lookups are arranged from Oldest to Newest lookup (Top to Bottom).

The screenshot shows the results of the 'Lookup History Report' for the user 'insurancemaster' between 5/1/2005 and 5/18/2005. The results are displayed in a table with the following structure:

Lookup History Report			
User Name: insurancemaster			
Begin Date: 5/1/2005 End Date: 5/18/2005			
Submit Cancel			
<Previous Next>			
<input type="checkbox"/> Personal Property Damage			
5/4/05 9:09A	* Not on File *	Child Support	NoMatch
Mismatch?			
<input checked="" type="checkbox"/> Personal Property Damage			

Password Reset (PMA Only)

Note: The following instructions apply only when a PIP Master Administrator (PMA) has forgotten his or her password. PIP Payer Accounts (PPA's) must have their passwords reset by asking any PMA in their company. DOR will not reset PPA passwords.

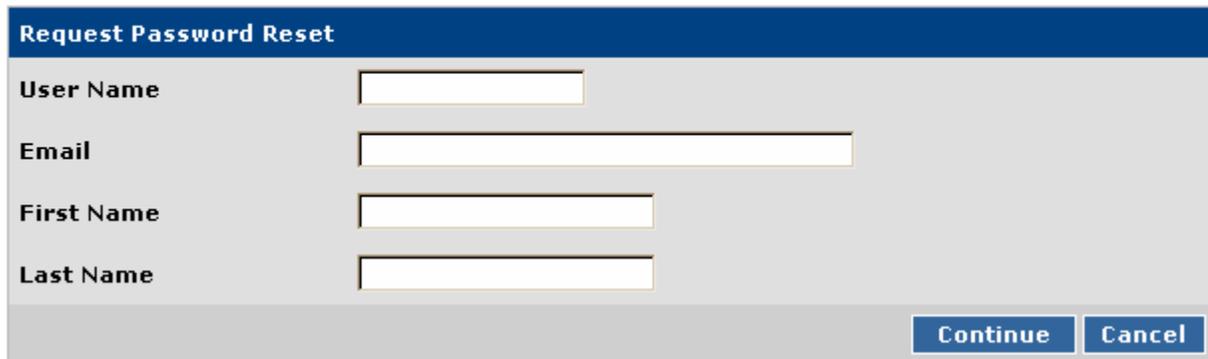
- **Retirement Boards with more than one PMA:** Any active PMA within your board may reset the password of another PMA, as well as for any PPA.
- **Organizations with only one PMA:** DOR must reset the password for a PMA who is the only active PMA within a retirement board. Use the "Forgot Password" link located on the PIP Login page to request your password reset.

Forgot Password Page

Once you enter your user name, e-mail address, first name and last name, click on the <Continue> button.

You will then be prompted to answer the Secret Question you chose as part of your company's original registration process. Type your secret answer. Then click on the <Submit> button.

If you forget your password, you must have it reset by Department of Revenue personnel. Use this form to request a password reset for a Master Account.



Request Password Reset	
User Name	<input type="text"/>
Email	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>	

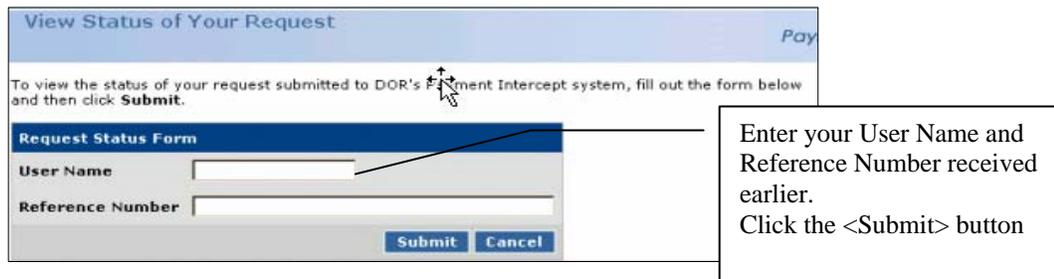
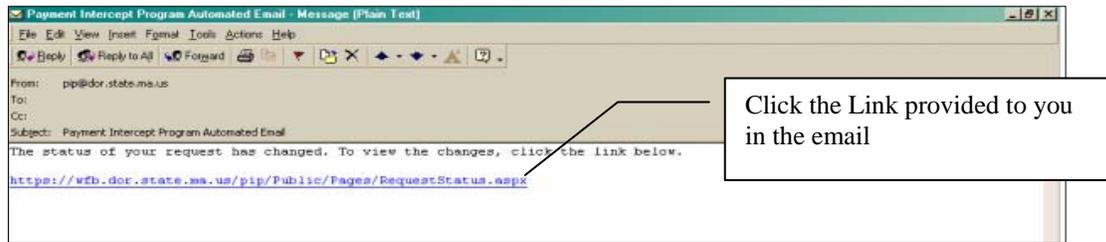
After clicking the <Submit> button, the site will confirm your request was submitted and provide you with a reference number.

IMPORTANT: YOU MUST PRINT OUT THE "REQUEST SUBMITTED" PAGE BECAUSE YOU WILL NEED THE REFERENCE NUMBER TO ACCESS YOUR NEW PASSWORD.

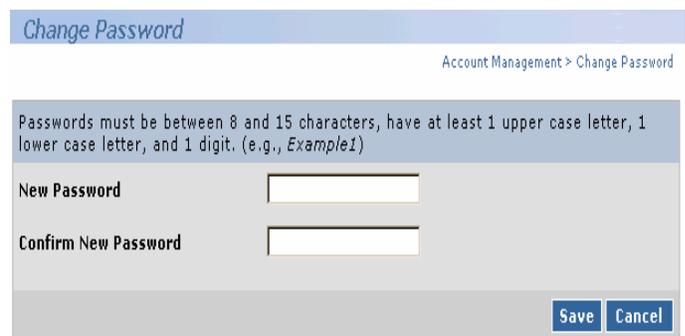
Approval of PMA Password Resets: DOR must approve a “Forgot Password” request.

Once your request is approved, you will receive an e-mail notifying you of a change in the status of your request.

- Enter your User Name and the Reference Number you received when you submitted your request



- Click the <Submit> button
- Confirming message “Your password has been reset...” and a **temporary password** that you will need to continue. Make sure to write down the temporary password.
 - **Note:** If your request for a password reset was denied, the message will state this. You will need to contact DOR to discuss the reasons for the denial.
- Click the <OK> button.
- Site will direct you to the PIP Login page.
- Enter your existing User name.
- Enter the temporary password provided.
- Click the <Log in> button.
 - Enter your new 8-15 character password
 - Click the <Save> button.



MADOR Agency Information

Payments:

Retirement Intercept Program

Department of Revenue

Child Support Enforcement Division

P O Box 9560

Boston, MA 02114-9560

Contact Information:

Email: pdustaff@dor.state.ma.us

Phone: 617-626-4154

Fax: 617-626-4049

Correspondence:

DOR/CSE

Retirement Intercept Program

PO Box 9560

Boston, MA 02114-9560