

## INSTRUCTIONS FOR MAKING SELF-PAYMENTS VIA PAYLOCITY

1. Go on to the Paylocity portal at <https://bat.paylocity.com>.
2. Under the section titled "I want to" click on the box "File a Claim".
3. Within the section titled "Create Reimbursement" under the section titled "Pay To" click on the drop-down arrow and select "Someone Else". Click next.
4. After the section titled "Payee" click "Select a Saved Payee"
5. Within the drop-down box after the section titled "Payee Name\*" select "Local 697" and complete the remainder of that page. (If "Local 697" is not listed, then you will need to type in the words "Local 697" in the space provided. The system will then save this information for the future). Your account number can be found on your medical identification card and begins with the numbers 697. The Funds address is 7200 Mississippi Street, Suite 300 Merrillville, IN 46410. Click next.
6. Upload a copy of the self-pay invoice from the Plan. Click next.
7. The next page should be titled "Claim Details". Complete that page and under the section titled "Provider" type in "Local 697". And within the drop-down box next to both the words "Category" and "Type", select "Premium Expense". Then select the individual for whom the benefit is being made. Click next.
8. Follow the remaining instructions.