

## Establishing a Relationship and Granting Access to Third-Party Administrators

This guide will show how an employer can establish a relationship with a third-party administrator (TPA) and grant access to manage the employer's account.

First, the employer and the TPA must both have active accounts in the system. (If necessary, refer to the guide on logging in and creating an account).

The TPA must take the initial step by requesting a relationship with the employer. To do this, the TPA must first log into the system and select the "Services for Agents" from the Left Navigation.

**My Employer Workspace**

My Employer Dashboard  
Directory of Services

**Quick Menu**

Employer Resources  
Agent Portfolio

**Services for Employers**

**Services For Agents**

**Other Services**

Communication Center  
Appointment Center  
Assistance Center

**Power of Attorney**

- POAs expiring in 90 days
- POAs that have been denied in the last 30 days
- POAs that have been approved in the last 30 days
- POAs pending approval in the last 30 days

**Completed Decisions (within the last 30 days)**

- Request for Information
- Denied
- Certified
- Pending
- Submitted Applications

[Configure Dashboard Widgets](#)

The “Representing Employers” tab displays a list of companies that the TPA represents. Scroll down until the “Search for Employers to Represent” hyperlink appears. Select the hyperlink to begin the process of requesting a relationship be established with a new employer.

General Information   Locations   Contacts/Users   Account Summary   Documents   **Representing Employers**

[Show Filter Options](#)

To sort on any column, click a column title.

Company Name	Contact	Location	Signature Date	Start Date	Ending Date	POA	Account Type	Status	FEIN/UIID	Action	Select
<a href="#">2428392 Inc</a>	Unknown Unknown	38 Corporate Circle Albany, NY 12203					Unemployment	Active	371962121/7660435	<a href="#">View</a>	<input type="checkbox"/>
<a href="#">3670 INC</a>	Unknown Unknown	ATTN UC EXPRESS TALX SAINT LOUIS, MO 63166					Unemployment	Active	251639341/6107301	<a href="#">View</a>	<input type="checkbox"/>
<a href="#">5 Gables Farm LLC</a>	Unknown Unknown	9000 TOWN CENTER PKWY LAKEWOOD RANCH, FL 34202					Unemployment	Active	823761970/7592782	<a href="#">View</a>	<input type="checkbox"/>
<a href="#">7-Eleven Inc</a>	Unknown Unknown	PO BOX 219088 DALLAS, TX 75221					Unemployment	Active	751085131/9921116	<a href="#">View</a>	<input type="checkbox"/>
<a href="#">7300 Beer, LLC</a>	Unknown Unknown	454 N 12TH ST PHILADELPHIA, PA 19123					Unemployment	Active	822935627/7587174	<a href="#">View</a>	<input type="checkbox"/>
<a href="#">84 LUMBER COMPANY</a>	Unknown Unknown	ATTN UC EXPRESS TALX SAINT LOUIS, MO 63166					Unemployment	Active	251613116/6321668	<a href="#">View</a>	<input type="checkbox"/>

[Delete](#)

Page 1 of 1 Rows 100

2 Records Found

[\[ Add Separation Notice Alleging Disqualification \]](#)

[Search for Employers to Represent](#)

Next, enter the Company Name, Federal Employer ID Number, and the UI Employer Account Number. Select the “Find Employer” button.

### Find an Employer to represent

Company Name:

Federal Employer ID Number: \*

UI Employer Account Number: \*

Account Type:

[Find Employer](#)

The Search Results will appear at the bottom for the employer that was entered. Click the box under the "Select" column and then click the "Select" hyperlink.

### Search Results

To sort on any column, click a column title.

Company	FEIN	Address	City	Zip Code	Select
TREELINE ENTERPRISES INC	232583543	933 CHESTNUT STREET	EMMAUS	18049	<input checked="" type="checkbox"/> <a href="#">Select</a>

Page 1 of 1 Rows 100

1 Records Found

An acknowledgment window will appear. Please read and select "OK." The second pop-up will prompt you to add an Authorization Document that will be uploaded to the system.

ucbenefits-uat.pa.gov says

I acknowledge that by requesting access to Unemployment Services, I will be responsible for responding timely to requests for information made by the Pennsylvania Department of Labor and Industry in accordance with Pennsylvania Unemployment Law.  
Click OK to accept. Click CANCEL to not accept.

From the Document Information screen, select “Power of Attorney” from the drop-down list. Then add a description in the “Document Tags” field. Enter the date the employer signed for the Power of Attorney. Select “Choose File” to upload document. Select “Save.”

## Document Information

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If you are providing documents requested during claim intake, select Fact Finding Documentation from the Document Description dropdown.

**Document Description:**

**\* Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.  
Keywords that will be indexed with this attachment.

**\* Employer Signature Date on Power of Attorney:**

**Start date on Power of Attorney:**

**End date on Power of Attorney:**

**Agent name on Power of Attorney:**

**Staff Approved:**

**Reason:**

## Attach Document

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**Document 1:**  TPA Guide Revision.docx

The page displays the Documents tab where you can verify that the upload was successful by seeing it on the list.

Name	Tags	Document Owner	Class	Create Date	Expiration Date	Action
Ben_Mod_UAT_Testing_PDF_(test_document_uploads).pdf	19830*: UAT_Emp-Mnt_0030-1.00 - 07_v4 Confirm the ability to designate a representative for Power of Attorney rights, logged in as a -	TPA 14	Power of Attorney	3/5/2020		<a href="#">View</a> <a href="#">Delete</a> <a href="#">Meta Data</a>
Ben_Mod_UAT_Testing_PDF_(test_document_uploads).pdf	test POA upload	TPA 14	Power of Attorney	3/12/2020		<a href="#">View</a> <a href="#">Delete</a> <a href="#">Meta Data</a>
500522-uc597_results.docx	POA	TPA 14	Power of Attorney	5/10/2020		<a href="#">View</a> <a href="#">Meta Data</a>
line_margin_off.docx	free	TPA 14	Power of Attorney	8/11/2020		<a href="#">View</a> <a href="#">Meta Data</a>
2020.10.02_How_to_grant_TPA_access_User_Guide_v.1.docx	yep	TPA 14	Power of Attorney	10/16/2020		<a href="#">View</a> <a href="#">Delete</a> <a href="#">Meta Data</a>

You have completed the steps a TPA must take to request a relationship to represent a specific employer.

The rest of the process continues with the steps the employer must take to accept your request.

## Employer Self Service - Accepting TPA Request and Granting Access

The employer must first log in to the system.

From the Dashboard, hover your mouse over the left-navigation menu selections of:

“Employer Portfolio->Employer Profiles-> Corporate Profile” and select “Corporate Profile.”

The screenshot shows the 'My Employer Dashboard' with a left-hand navigation menu. The 'Employer Portfolio' menu item is expanded, showing 'Employer Profiles' and 'Corporate Profile'. A red arrow points to 'Corporate Profile'. Below the navigation menu, there are sections for 'My Messages' (with 1 Read Message and a link to 'Enter the Message Center') and 'My Calendar' (for October 2020, with a link to 'Enter the Appointment Center'). A link 'Configure Dashboard Widgets' is visible at the bottom right.

Select “Agents” Tab and select the “Activate” link for the TPA to whom you are giving access.

The screenshot shows the 'Agents' tab selected in the top navigation bar. Below the tabs, there is a table of agents. A red arrow points to the 'Agents' tab, and another red arrow points to the 'Activate' link in the 'Action' column of the first row.

Agent Name	Contact	Agent type	Location	Signature Date	Start Date	Ending Date	Authorization Docs	Agent Access	Action
TPA 14	Joe Test	Third Party Administrator Agent	24 N LINDEN ST Duquesne, PA 15110	10/16/2020			2020.10.02 How to grant TPA access User Guide v.1.docx	Pending	<a href="#">View</a> <a href="#">Activate</a>

The “User Privileges” page will display. This is where you can select the amount of access that the TPA will have in representing your employer account. This is for unemployment benefits matters only and does not impact your unemployment tax relationship or information, which is in the Unemployment Compensation Management System (UCMS).

Choose “Select All” so that the TPA will have the ability to handle all these privileges.

## **User Privileges**

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Select All / Un-Select All



**Contact:** Joe Test

### **Basic Contact Privileges**

#### **User Privileges for Corporate Information**

Edit General Information

#### **User Privileges for Locations**

Add and Edit Locations

#### **User Privileges for Locations Associated with this User**

Edit Locations

Activate and Inactivate Locations

#### **User Privileges for Locations NOT Associated with this User**

Edit Locations

Activate and Inactivate Locations

#### **User Privileges for Contacts at the Location(s) Associated with this User**

Add and Edit Contacts

Edit Contacts

Activate and Inactivate Contacts

#### **User Privileges for Contacts at the Location(s) NOT Associated with this User**

Add and Edit Contacts

Edit Contacts

Activate and Inactivate Contacts

#### **User Privileges for Messages**

View Messages

### **Unemployment Privileges**

#### **User Privileges for UI**

Review and respond to claims filed (Statement of Potential Charges /Notice of Claim Filed)

File a separation notice on a former employee (Form 77)

Review claimant wage information

Review and protest employer charges

Manage appeals

Request part-time credits

Respond to SIDES/SIDES e-Response requests

Respond to a Benefits Accuracy Measurement (BAM) request

Manage Trade Act activities

Unemployment Messages

Your chosen privileges for this TPA will be saved.

The process to establish an employer-TPA relationship is complete.