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.

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.

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

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   None Selected ▼

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	☑
					Select

Page 1 ▼ of 1   Rows 100 ▼

1 Records Found

An acknowledgment window will appear. Please read and select "OK."

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.

OK   Cancel

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

uat.benefits.uc.pa.gov says

If you would like to upload an Authorization document, click OK. If you would like to save this employer without adding a document, click cancel.

OK   Cancel

On the next screen, please click on the "Upload a Document" button.

Primary Location Information

Company Name:	Forensic Consultants Inc.
LocationName:	UI Benefit Location
City:	Newfoundland
State:	PA
County:	Wayne County
Country:	US
Zip code:	18445
Federal ID:	232983979
Unemployment Ins. Tax ID #:	7514426

Authorization Documentation

⊞ Show Filter Options (Results are being filtered)

No records found

Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system.

Upload a Document   Scan a Document

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

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

Document Description: Power of Attorney

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

Test

* Employer Signature Date on Power of Attorney: 10/27/2020

Start date on Power of Attorney:

End date on Power of Attorney:

Agent name on Power of Attorney:

Staff Approved:

Reason:

Attach Document

Document 1: Choose File 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_do cument_uploads).pdf	19830*: UAT_Emp-Mnt_0030-1.00 07 _v4 Confirm the ability to desi gnate a representative for Power of Attorney rights. logged in as a	TPA 14	Power of Attorney	3/5/2020		View Delete Meta Data
Ben_Mod_UAT_Testing_PDF_(test_do cument_uploads).pdf	test POA upload	TPA 14	Power of Attorney	3/12/2020		View Delete Meta Data
500522-uc597_results.docx	POA	TPA 14	Power of Attorney	5/10/2020		View Meta Data
line_margin_off.docx	free	TPA 14	Power of Attorney	8/11/2020		View Meta Data
2020.10.02_How_to_grant_TPA_acce ss_User_Guide_v.1.docx	yep	TPA 14	Power of Attorney	10/16/2020		View Delete Meta Data

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."

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

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

☐ 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

Please select the "Active" button to activate the relationship and then click the "Save" button.

Status:　　　　　　　　　　　○ Pending ◉ Active ○ Inactive

Save   Cancel

Your chosen privileges for this TPA are now saved.

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