



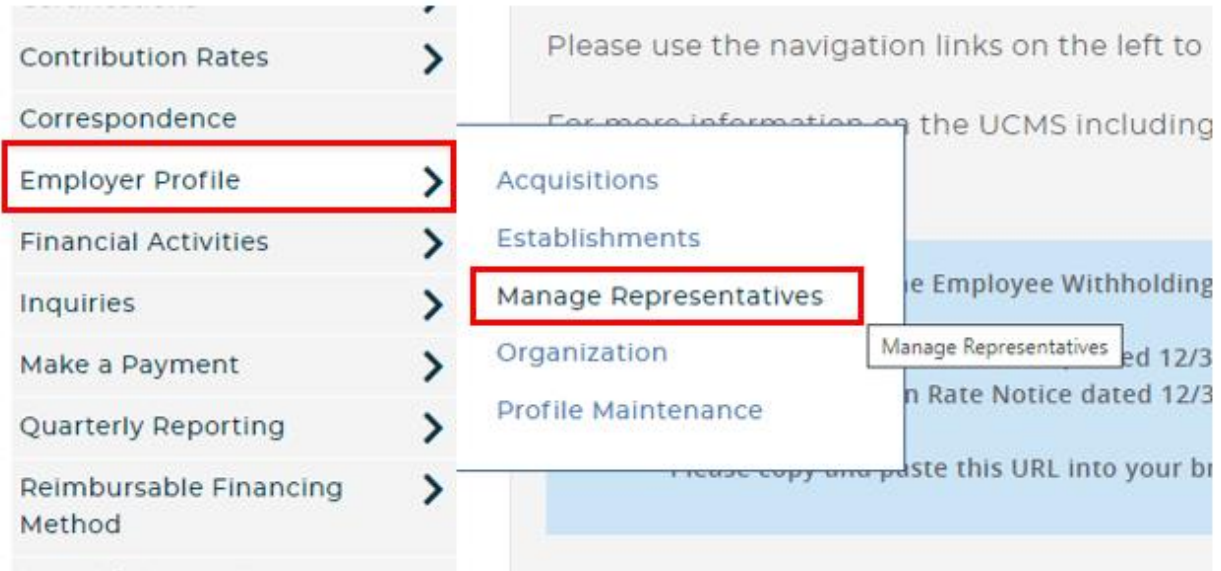
Allowing Third Party Administrator Access to an Employer Account

Unemployment Compensation Management System
Office of Unemployment Compensation Tax Services

The purpose of this tutorial is to give instructions for employers and their Third-Party Administrator (TPA) on how to add a representative to an employer account in the Pennsylvania Unemployment Compensation Management System (UCMS). After this process is completed, the TPA will be able to access the employer account from their TPA account.

The first step in the process is for the employer to get their TPA’s 10-digit account number from their TPA.

After the employer receives their TPA’s 10-digit account number, the employer can login into their unemployment compensation tax account at www.uctax.pa.gov. After the employer is logged into their account, navigate to “Employer Profile” then “Manage Representatives” by using the menu on the left side of the page.



On the Manage Representatives screen, click the “Add New Representative” button.


Manage Representatives



Select a service function to edit.

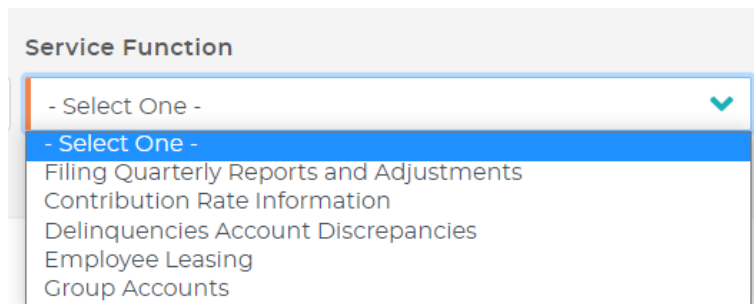
Add New Representative

The employer will then be brought to the “Manage Representatives” screen to enter representative information.




Enter the following information:

- **Representative Identifier:** This is the 10-digit account number of the TPA/representative for whom the employer wants to give access to their account.
- **Effective Date:** This is the effective date of when the TPA/representative begins the relationship with the employer.
 - **NOTE:** This date can only be the current date or a future date, not a past date.
- **Service Function:** This is the function that the TPA/representative will be allowed to perform on the employer account. A TPA/representative can be allowed to perform multiple functions on an employer account, but those functions can only be entered one at a time. See example of options below:



Typically, only the first three options are used. Employee Leasing and Group Accounts are rarely used.


NOTE: If a Service Function is selected that the TPA/representative does not provide, the following error message will be displayed at the top of the screen:

 Error(s) - Scroll to View All

- Selected service function is not performed by this representative.

NOTE: An employer may only have one active TPA/representative per service function at any given time. If an employer previously established a relationship with another TPA for a service function and adds a new TPA for that same service function, UCMS will automatically terminate the relationship with the old TPA.

After the employer clicks the “Submit” button, they will be brought back to the “Manage Representatives” screen and can see that the TPA/representative relationship has been started and is in “Requested” status.

Manage Representatives 

Select a service function to edit. Add New Representative

Filing Quarterly Reports and Adjustments

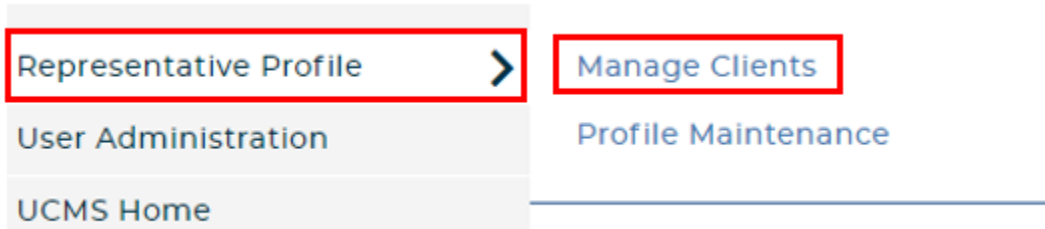
Filing Quarterly Reports and Adjustments - Details

Representative Identifier	Representative Name	Status	Effective Date	End Date
5828789050	L&I Test TPA Account	Requested	07/24/2023	

Viewing all records

This will complete the employer’s role in the process.

The TPA/representative would now login into their TPA account at www.uctax.pa.gov. After logging in, navigate to the “Representative Profile” then “Manage Clients” from the menu on the left side of the page.



On the Manage Clients screen, the new client can be seen in the list of My Clients.

NOTE: that the status is “Requested”. Under the Actions column, the representative can either Approve (thumbs up) or Deny (thumbs down).

The screenshot shows the 'Manage Clients' interface. At the top right, there is a header with the following information: Employer Name: L&I Test TPA Account, Employer Account: 58-28789050, FEIN: 01-0000002, and Status: Active. On the left, there is a navigation menu with items like 'My Home', 'Amounts Due Delinquencies', 'Audits', 'Certifications', 'Contribution Rates', 'Correspondence', 'Employer Profile', 'Financial Activities', 'Inquiries', 'Make a Payment', 'Professional Employer Organizations', and 'Quarterly Reporting'. The main content area is titled 'Manage Clients' and contains a 'My Clients' section with a 'Filter Results' input field. Below this is a table with the following data:

Account Number	Client Name	Status	Effective Date	End Date	Actions
7357387	PA Misc Employer	Verified	02/14/2016		
7414554	L&I Test Employer Account	Terminated	01/20/2013	01/15/2013	
7802516	TEST BUSINESS	Requested	07/24/2023		

Below the table, it says 'Viewing all records'.

When the TPA/representative clicks “Approve,” they will be brought to the screen showing the client’s name and account number before confirming that they want to approve.

Manage Clients

The screenshot shows a confirmation dialog titled "My Clients". It asks, "Are you sure you want to approve this client?". Below the question are two input fields: "Name" containing "TEST BUSINESS" and "Account Number" containing "7802516". At the bottom left is a "Back" button, and at the bottom right is a green "Approve" button.

Once approved, the TPA/representative is brought back to the “Manage Clients” screen. The status is then displayed as “Verified.”

Manage Clients

The screenshot shows the "Manage Clients" table. The table has columns for Account Number, Client Name, Status, Effective Date, End Date, and Actions. The row for account number 7802516 and client name TEST BUSINESS has a "Verified" status, which is highlighted with a red box.

Account Number	Client Name	Status	Effective Date	End Date	Actions
7357387	PA Misc Employer	Verified	02/14/2016		
7414554	L&I Test Employer Account	Terminated	01/20/2013	01/15/2013	
7802516	TEST BUSINESS	Verified	07/24/2023		

To enter a client’s account, the TPA/representative would navigate to “My Home” from the left menu option. There are two options for the TPA/representative to choose the client account they want to access: “Account Legal Name” or “Account Number.” After choosing the client, select the “Go” button next to the selection area.

TPA Client Selection

The screenshot shows the "TPA Client Selection" form. It prompts the user to "Select the client by either Account Legal Name or Account Number below." There are two selection areas. The first is "Account Legal Name" with a dropdown menu showing options: "- Select One -", "L&I Test Employer Account", "PA Misc Employer", and "TEST BUSINESS". A red box highlights the dropdown, and another red box highlights the "Go" button next to it. The second selection area is "Account Number" with a dropdown menu showing "- Select One -" and a "Go" button, also highlighted with red boxes.

The TPA/representative is then brought to the “Profile Maintenance” screen for that employer.

NOTE: At the top right corner, the user (in this case, the representative) and the account associated with that user (in this case, the TPA account) are displayed. In the navy ribbon below, the employer profile being viewed is displayed. The navy ribbon will be the indicator to show if the user is in the employer or TPA account as different options are selected from the left menu.

Department of Labor & Industry

Mary Jones L&I Test TPA Account

Employer Name: TEST BUSINESS, Employer Account: 7B-02516, FEIN: 56-4849456, Status: Active, Financing Method: Contributory

Profile Maintenance

Summary | Addresses | Contacts/Users | Login History

Profile Summary

Trade Name

Account Status: Active, Account Status Effective Date: 07/17/2023, Account Creation Source: PA Online Business Tax Registration

After the TPA accepts the client, the employer can login and navigate to “Employer Profile” then “Manage Representatives.” The new relationship with the TPA/representative has been completed and the status will show “Verified.”

Department of Labor & Industry

JOHN SMITH TEST BUSINESS

Employer Name: TEST BUSINESS, Employer Account: 7B-02516, FEIN: 56-4849456, Status: Active, Financing Method: Contributory

Manage Representatives

Select a service function to edit.

Add New Representative

Filing Quarterly Reports and Adjustments

Filing Quarterly Reports and Adjustments - Details

Representative Identifier	Representative Name	Status	Effective Date	End Date
5828789050	L&I Test TPA Account	Verified	07/24/2023	

Viewing all records

Edit

A notification of the acceptance of the TPA/Client relationship will be created and sent to the employer by their notification preference (US Mail or Email). In the “Correspondence” screen, the new notification can be viewed confirming that the representative approved the relationship with the employer.

Department of Labor & Industry

JOHN SMITH TEST BUSINESS

Employer Name: TEST BUSINESS, Employer Account: 78-02516, FEIN: 56-4849456, Status: Active, Financing Method: Contributory

Manage Correspondence

Search Correspondence

Select Type: All

Date Sent: From 07/24/2022 To 07/24/2023

Go

Search Results

Type	Document Name	Date Processed	Date Resent	Status	Actions
Registration	Representative Accepted Client Notification	07/25/2023		Mail to be Sent	

If you have questions, please contact Employer Tax Services at 866-403-6163 weekdays from 7:30 a.m. to 4:00 p.m. Eastern Time