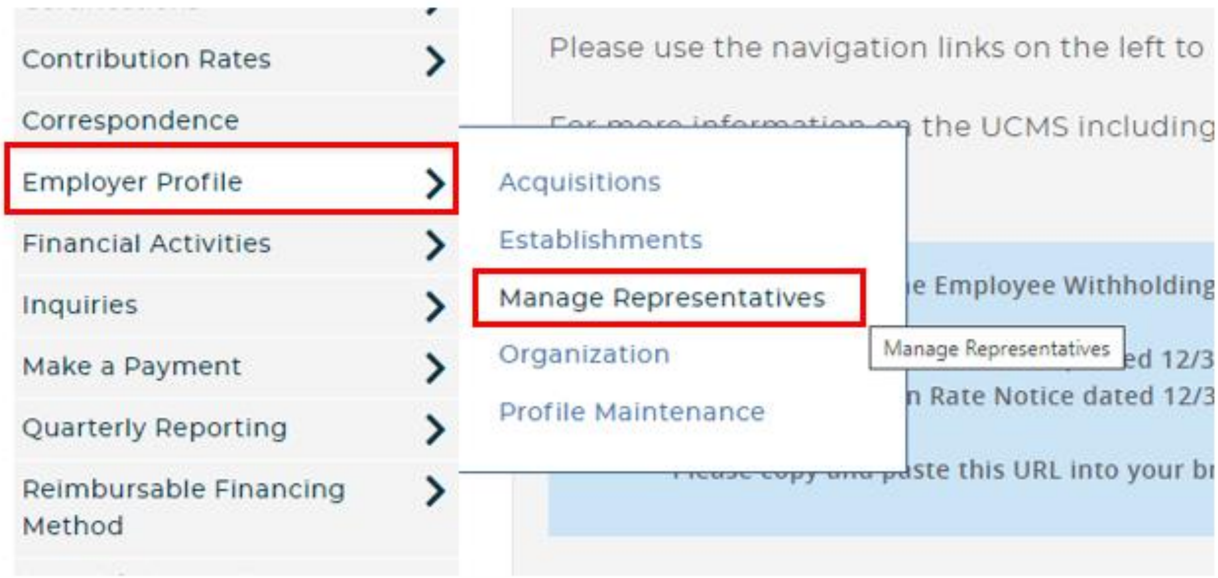
Allowing Third Party Administrator Access to an Employer Account

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.

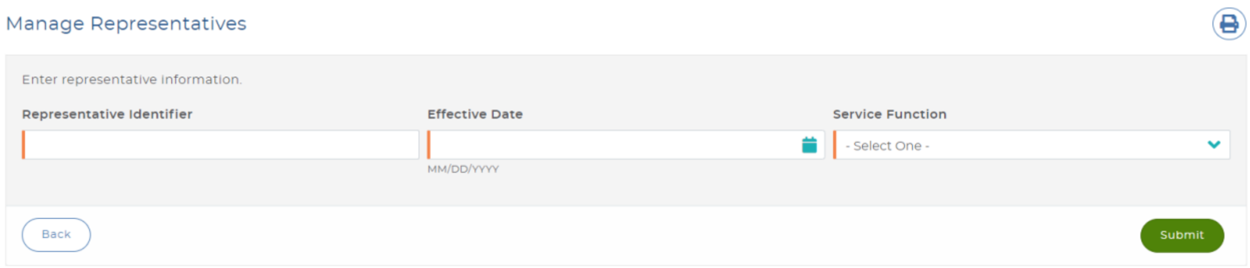
The first step in the process is for the employer to get their TPA's 10-digit account number from their TPA.

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.](http://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.



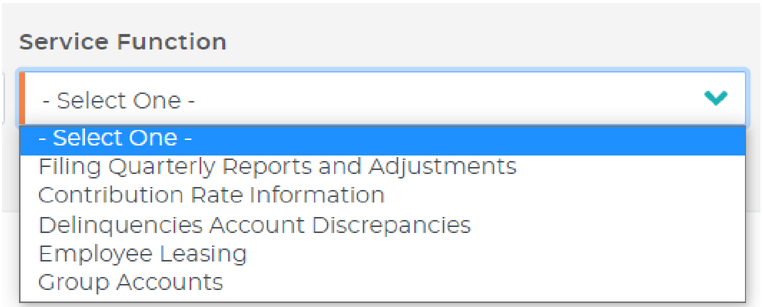
On the Manage Representatives screen, click the "Add New Representative" button.

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:

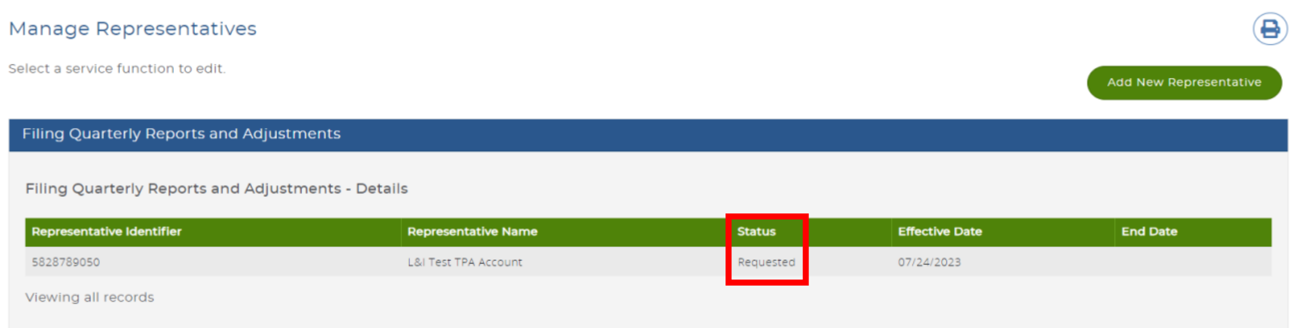


Typically, only the first three options are used. Employee Leasing and Group Accounts are rarely used.

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:

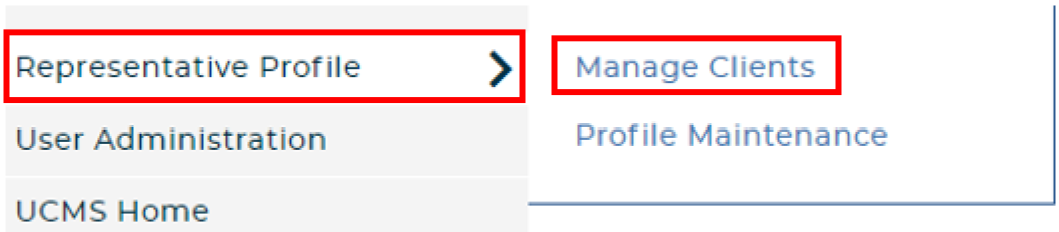
NOTE: *An employer may only have one active TPA/representative per service function at any given time. If an employer previously established a relationship with another TPA for a service function and adds a new TPA for that same service function, UCMS will automatically terminate the relationship with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



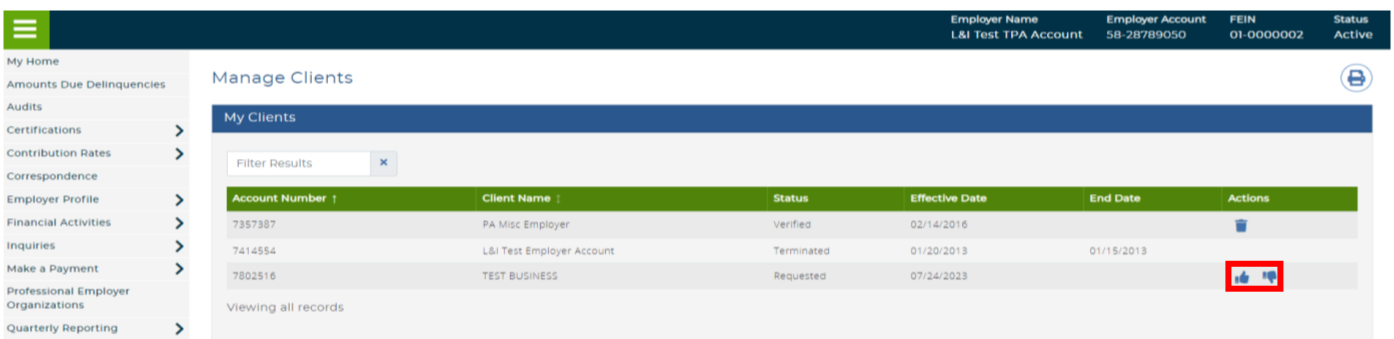
This will complete the employer's role in the process.

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.



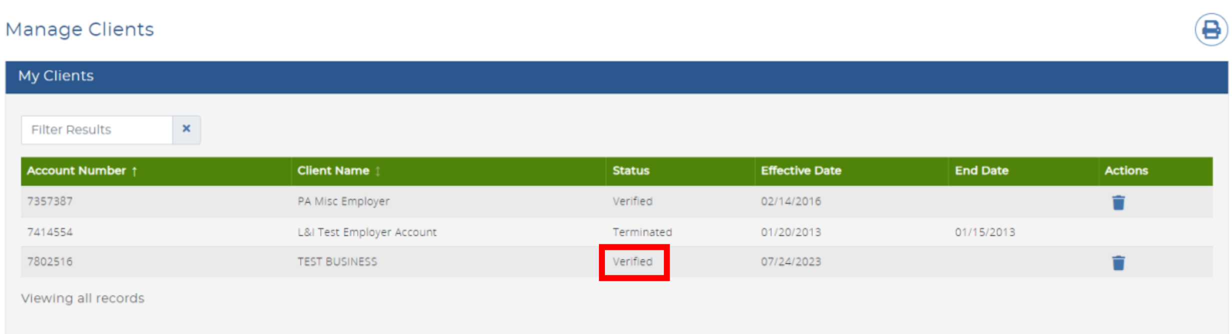
On the Manage Clients screen, the new client can be seen in the list of My Clients.

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

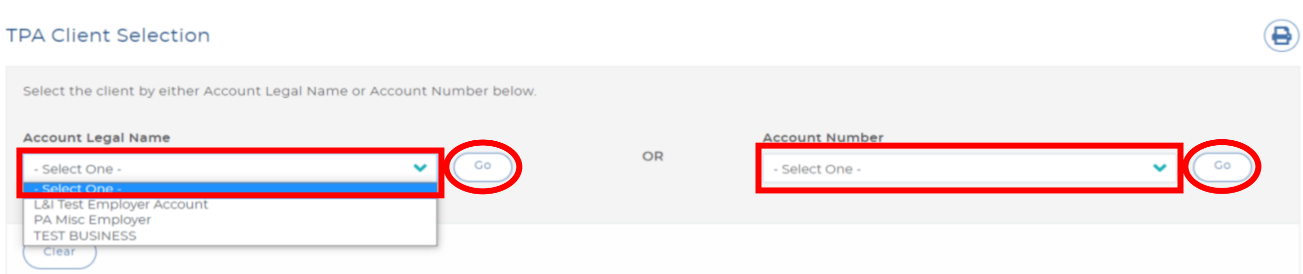


When the TPA/representative clicks “Approve,” they will be brought to the screen showing the client’s name and account number before confirming that they want to approve.

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

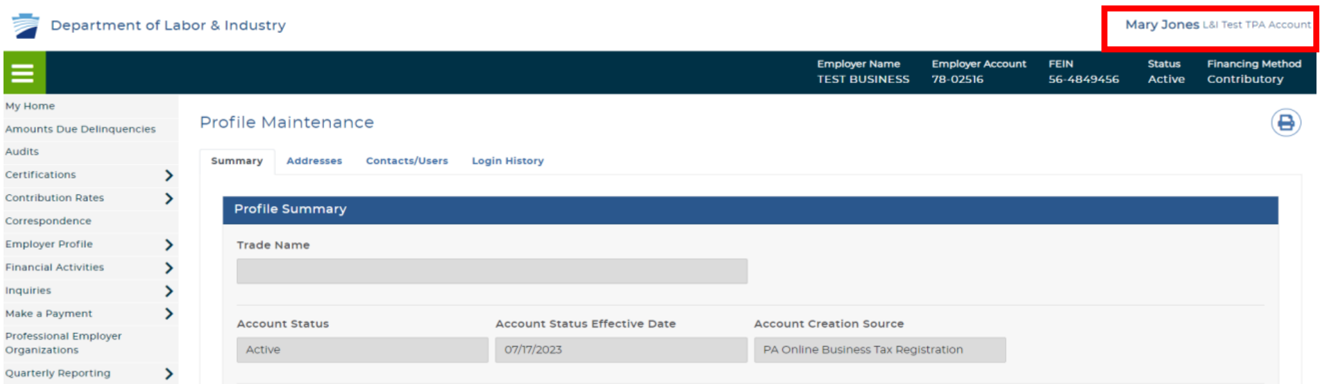


To enter a client’s account, the TPA/representative would navigate to “My Home” from the left menu option. There are two options for the TPA/representative to choose the client account they want to access: “Account Legal Name” or “Account Number.” After choosing the client, select the “Go” button next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

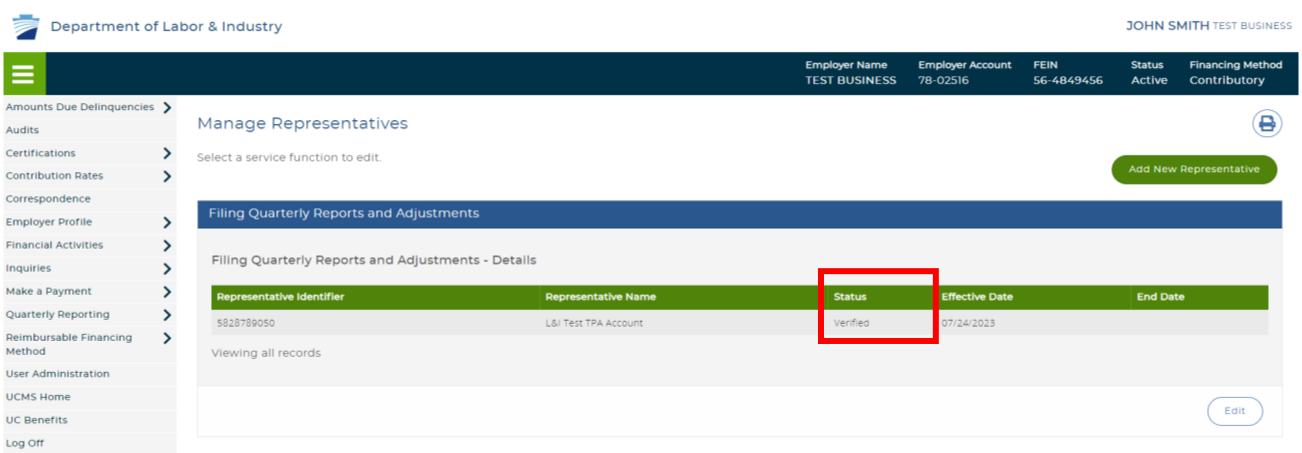


The TPA/representative is then brought to the “Profile Maintenance” screen for that employer.

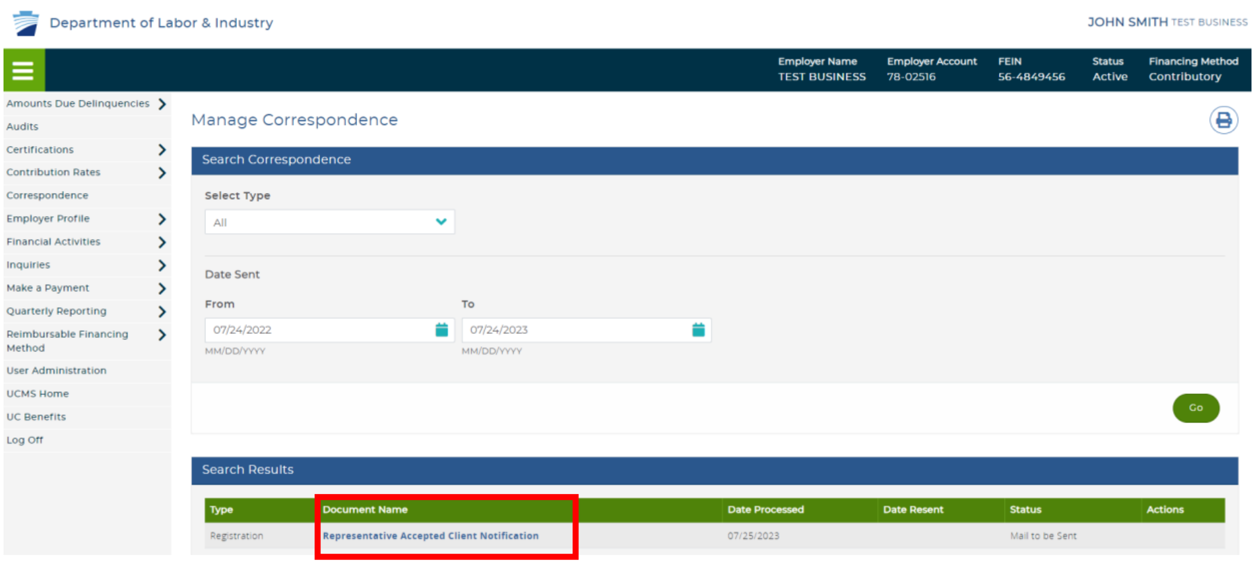
NOTE: At the top right corner, the user (in this case, the representative) and the account associated with that user (in this case, the TPA account) are displayed. In the navy ribbon below, the employer profile being viewed is displayed. The navy ribbon will be the indicator to show if the user is in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



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.”



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.



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