THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF UNEMPLOYMENT ASSISTANCE

Employer Self Service User Guide

DUA QUEST Project

Department of Unemployment Assistance (DUA)

Commonwealth of Massachusetts

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QUEST Quick Start

HOW TO START WITH QUEST

Introduction	How you start with QUEST depends on whether you are a **regular user** or an **Administrator** who is setting up your QUEST account.

For Regular Users

Regular users can start using QUEST once they are notified that their account is ready. Start with these sections to get up and running:

- *QUEST Requirements*
- *Accessing QUEST*
- *Navigation and Software Tips*

For Administrators

Before regular users can use QUEST, an Administrator must set up the Employer account, create users, and (if applicable) authorize Third Party Administrators (TPAs) to act on your behalf.

Registering or Activating the Account

An **Administrator** must set up the Employer account – either by **registering** it, or **activating** it – before QUEST can be used.

- If your business was established after December 7, 2009 or you have not yet conducted business with the Massachusetts Department of Unemployment Assistance (DUA), you must **register** with the DUA before you can use QUEST. Start with the section, ***Employer Registration***.
- If your firm conducted business with the DUA before the QUEST system was rolled out on December 7, 2009, then an Employer account was probably already created on your behalf. However, you must **activate the account** before you can use QUEST. Start with the section, ***Account Activation***.

Creating Additional QUEST Users

The person who completes the **Employer registration** or **account activation** is assigned the **Employer System Administrator** role by default. This user receives login credentials to access the QUEST self – service account during the registration/activation process.

This user can in turn add additional users to the QUEST account. New users can be assigned the Employer System Administrator role or any of six other roles. For detailed instructions, see the section, *User Maintenance*.

Authorizing Your TPA(s)

Some Employers contract with Third Party Administrators (TPA) to perform accounting and/or payroll services. Many of these TPAs routinely conduct business with DUA on behalf of those Employers. If you use any TPA(s) you must authorize them from within QUEST to act on your behalf. See *TPA Authorization* under the *Account Maintenance* section for instructions.

For each TPA you authorize you must enter the TPA ID that was issued by DUA, and assign the roles that are specific to the functions you want the TPA to perform. DUA recommends that you coordinate with your TPA(s) to arrange authorization.

GETTING SUPPORT FROM DUA

Revenue Services Main Number	617-626-5075
General Inquiries Account Activation Temporary User ID/Password for Account Activation	
Passwords	617-626-5551
User ID/Password for QUEST Password Reset (for permanent passwords only)	
Employer Liability	617-626-5050
New Account Registration Closing an Account Address change Method of Payment Third Party Administrator Update	
Business Transfers	617-626-5272
Change of Ownership Purchase, sale or transfer of business Change in organizational type Reporting new Federal Tax ID number	
Tax Rates	617-626-6893
Experience Rating Information Voluntary Contribution Program Annual Rate Notice	
Contributory Benefit Charges	617-626-6350
Statement of Benefit Charges/Protests	
Reimbursable Benefit Charges	617-626-5790
Bills/Charge Reviews	
FUTA Certifications	617-626-5790
ACH Credit Applications	617-626-5790
Employment and Wage Reporting	617-626-5243
How to file employment and wage detail reports How to make payments	
Adjustments/Refunds	617-626-5090
Employment and Wage Detail adjustments Refunds Payment information Out of State Wage Detail Credits	

Revenue Collections	617-626-5770
Payment Plan	
Enforcement	617-626-5750
Notice and demand for payments	
Tax Liens and Bankruptcy	
Tax Intercept	
Revenue Audit	
Boston	617-626-6820
Western Region	413-452-4725
Claimant Overpayment Recovery	617-626-6300
Seasonal Employer Certification	617-626-5451
Fair Share Contributions	617-626-6080
Wage Processing	617-626-5039
Calls for Monetary Employers for 1062 & 1074	
Applicants requesting alternate base periods	
Applicants for wages	
W-2 pay stubs (form 1099)	
Economic Data	617-626-5744
LMI and Career Information	
Resource Center	
Local Area Unemployment Statistics	
Mass Career Information System	617-626-5718
24-Hour Fraud Hotline	800-354-9927
Hearings Department	
Greater Boston Regional Hearings Office	617-626-5200
Northeast Regional Hearings Office (Lawrence)	978-738-4400
Southeast Regional Hearings Office (Brockton)	508-894-4777
West/Central Regional Hearings Office (Springfield)	413-452-4700

Web Address: www.mass.gov/uima

QUEST REQUIREMENTS

To run the QUEST software the following are required:

A connection to the Internet

Web browser software. Any of the following browsers are recommended:

- Microsoft Internet Explorer, versions 6, 7, 8, 9.
- Mozilla Firefox, versions 1, 2.
- Apple Safari, versions 2, 3.
- Netscape Navigator, versions 8, 9.

Adobe Acrobat Reader, versions 7, 8.

IMPORTANT BROWSER SETTINGS:

- Add https://uionline.detma.org to the list of Trusted Sites.
- Disable pop-up blockers.

SYSTEM OVERVIEW

Introduction to QUEST	QUEST (Quality Unemployment System Transformation) is the system that currently provides Employers and Third Party Administrators (TPAs) with a fast, interactive web-enabled way to transact business with the Department of Unemployment Assistance (DUA). These transactions involve in large part the processing of Employer contributions to the Massachusetts UI system. These contributions are part of the revenue from which Claimants who qualify for Unemployment Insurance may be paid. This **Revenue system** was rolled out in December of 2009. This user guide is limited to the Revenue System. It is intended for use by Employers accessing QUEST, and by Third Party Administrator (TPAs) who perform Employer account-level activities for their client Employers using QUEST. (TPAs should also use the *QUEST TPA Self Service User Guide*. It can be found on *www.mass.gov/uima*.)
REVENUE System	The DUA QUEST Revenue System automates the Registration, Wage and Employment Reporting, and Tax Calculation and Payment processes with the following time-saving improvements: • Employers can get complete up-to-date account information and access and maintain their accounts online, via self service. • Wage and Employment filings, UI and UHI Tax filings can be completed in a single process. • Third Party Administrators can file electronically and process multiple records at the same time using file uploads. • Employers can use online processing for quarterly tax filing and either manually enter data, or upload files for larger submissions. • Employers and Third Party Administrators can make secure online payments.
Disclaimer:	The purpose of this user guide is to help Employers to navigate the QUEST system. It should not be used as a reference for Unemployment Insurance Program policies and procedures. Please refer to the DUA website at www.mass.gov/dua for Unemployment Insurance Program Policies and Procedures.

ACCESSING QUEST

Introduction

This section describes how to access the QUEST system.

- **Most new users** typically access QUEST **for the first time** by clicking the link in an email they receive. See the section, *First Time Account Access with Emailed Link*.
- **After their first time** accessing QUEST, **all users** can log in from the DUA website. See the section, *Logging In*.

IMPORTANT NOTE: The **System Administrator** who registers or activates the Employer account will access QUEST **for the first time** using a different login process. See the section, *First Time Login After Registration* or the section, *First Time Login After Account Activation*.

First Time Account Access with Emailed Link

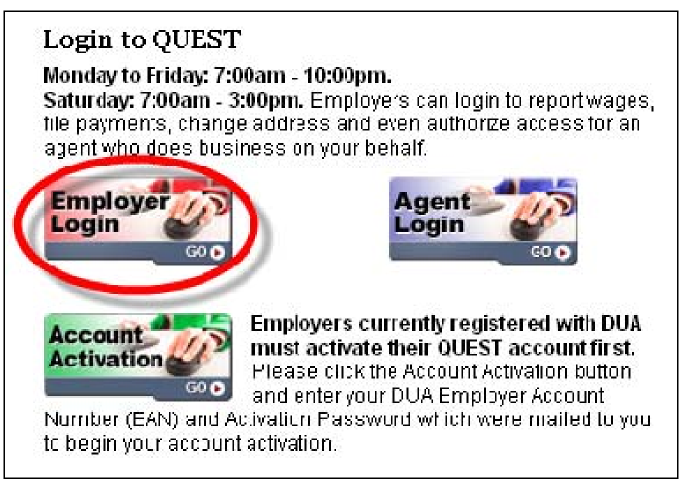
When your System Administrator creates an account for you, the QUEST system automatically generates an email message containing a link.

1. Click the link in the email message to launch a browser with a special login page.
2. Enter a Password of your choosing, select a security question, answer the security question, set a PIN, and click **Save**.

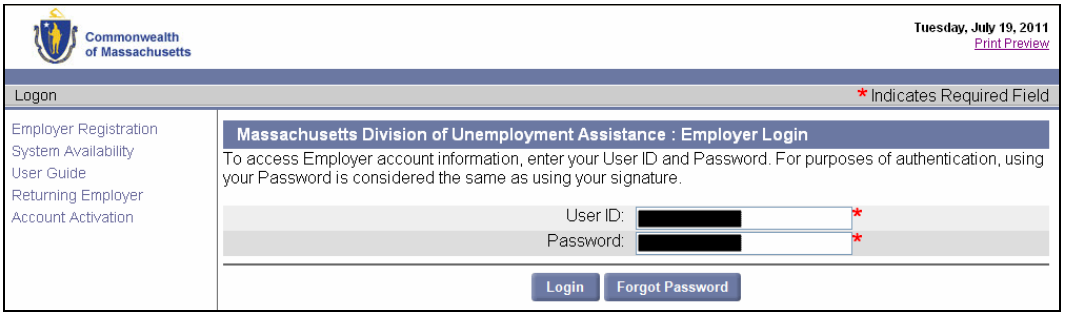
Logging In

If you have previously logged into QUEST, you can log in using the following steps.

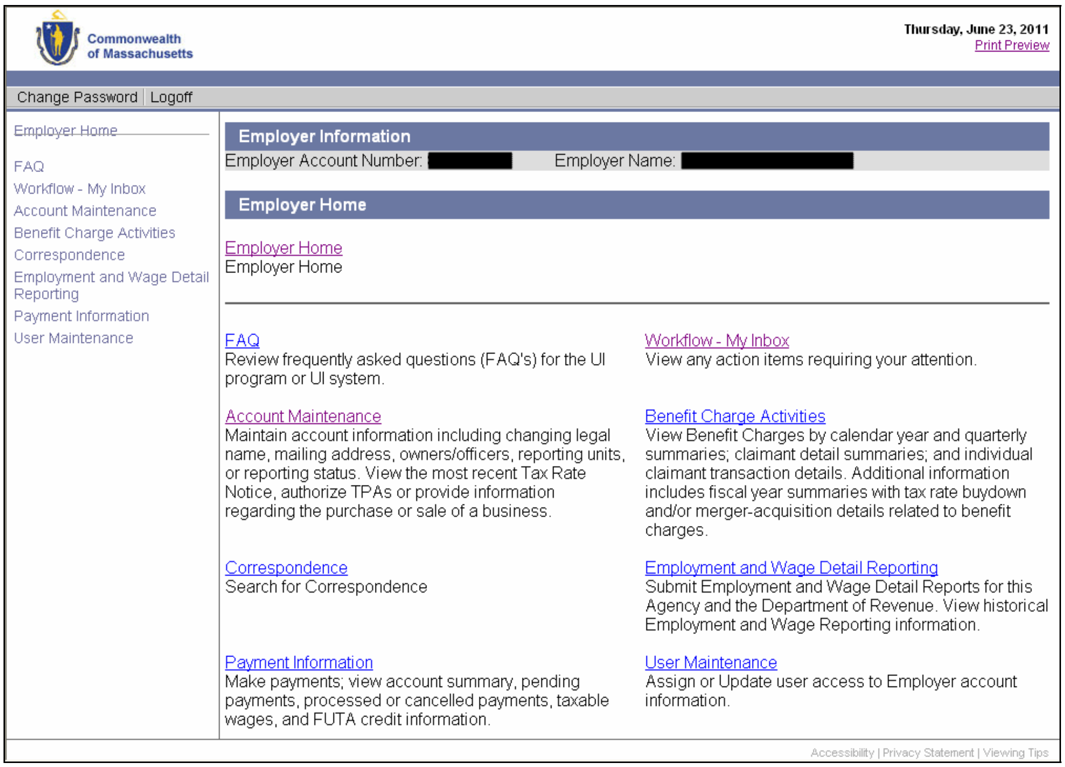
1. Navigate to the DUA – QUEST webpage at www.mass.gov/uima.
2. Scroll to the **QUEST** area of the page. Click **Employer Login**.



3. In the **Employer Login** page, enter your User ID and Password. Click **Login**.



4. When the **Employer Home** page appears you have successfully logged into the QUEST system.



Logging Off

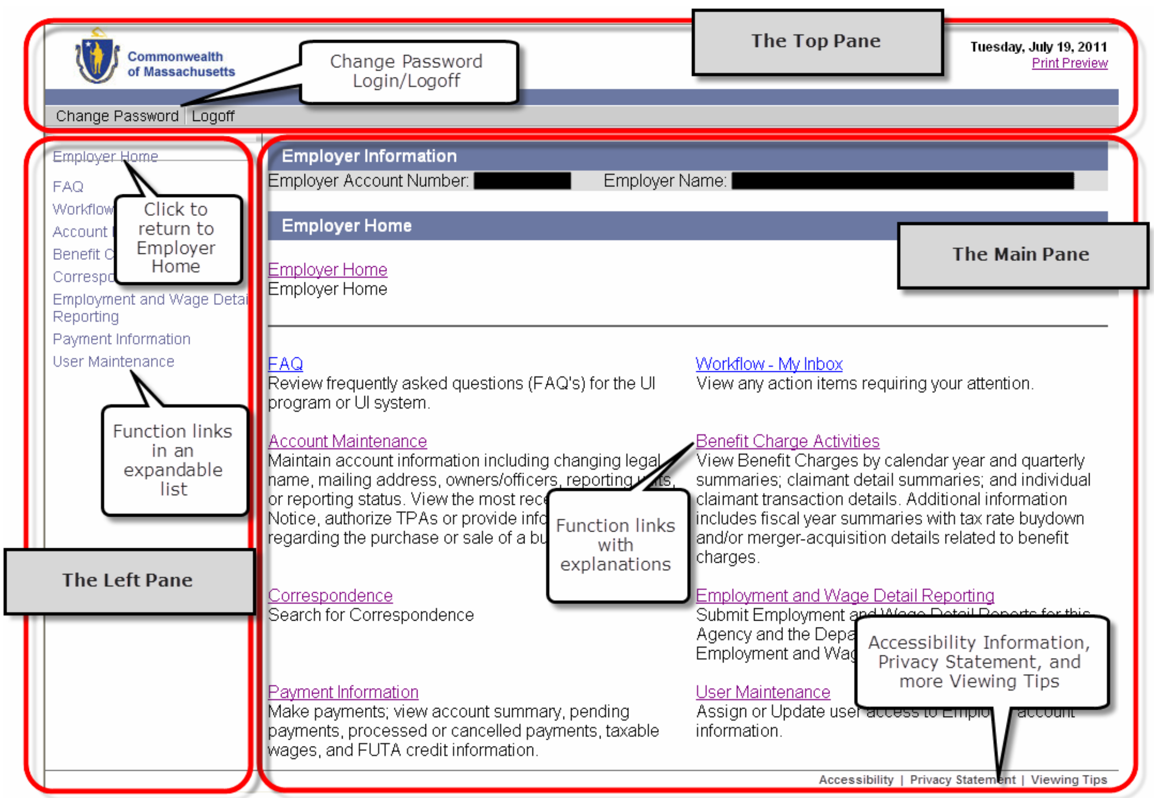
Click **Logoff** to end your QUEST session.

NAVIGATION AND SOFTWARE TIPS

Introduction	This section provides tips on navigating and using the QUEST software: • The Employer Home page • System Timeout • Helpful Hints – Assistive Content • Additional Tips

The Employer Home Page

The first page that appears after you log in to the system is the **Employer Home** page.



The **Employer Home** page has three panes: the **left pane**, the **top pane**, and the **main pane**.

- The top pane has links to **Change Password**, **Login**, and **Logoff**.
- The **left pane** has links you can click to bring up the main QUEST **functions**. When you click function links in QUEST, the list in the left pane expands to show the additional functions that are available under the main functions. The left pane also has the **Employer Home** link. Click this link at any time to return to the Employer Home page.
- The **main pane** initially displays the same links to Employer functions as the left pane. It also provides explanations about each function.

  If you click a function link, the main pane displays information and controls that are specific to the function.

  IMPORTANT NOTE: Not all function links display for all users. The Employer System Administrator at your place of business has configured which functions links you see when you use QUEST.

System Timeout

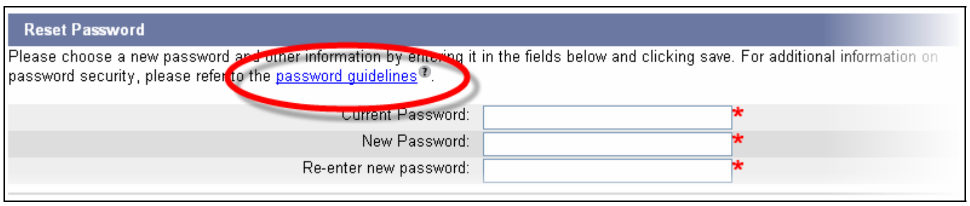
The QUEST system times out after 30 minutes. If you are entering detailed data, save frequently; otherwise if a timeout does occur, the data may be lost. (Save by clicking the Save button or by navigating to the next page and then returning to the previous page.)

Helpful Hints – Assistive Content

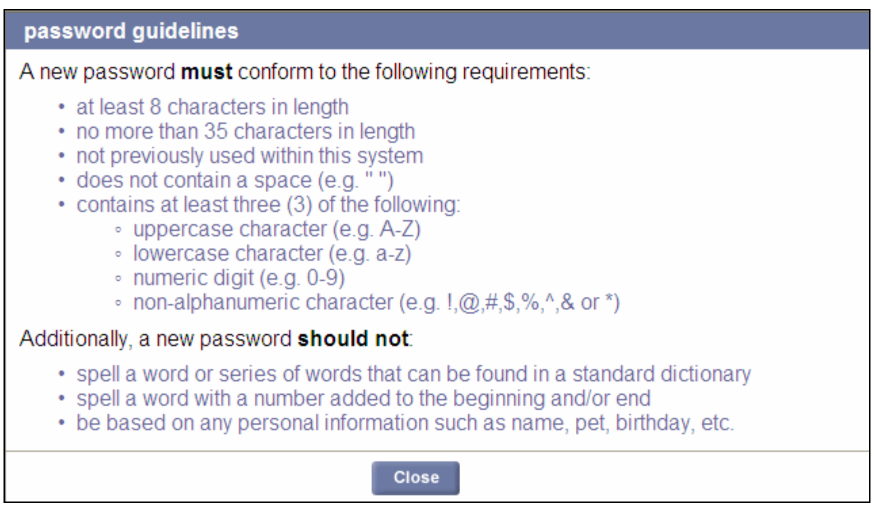
Most pages in QUEST provide helpful hints about using the software right on screen. In addition, there are links that you can click to bring up a separate window with more in-depth information about a topic. This information is known as **Assistive Content** in QUEST.

Assistive Content links are blue and underlined, with a small question mark to the right.

An example of an assistive content link for **password guidelines**:



Click the Assistive Content link to display information about the phrase in a separate window.



Click **Close** to close the Assistive Content window.

Additional Tips

Do not use your browser's **Back** or **Forward** buttons to navigate in QUEST. Click the **Previous** or **Next** (or Save or Submit) buttons that are provided right on each QUEST page.

Use the **Employer Home** link to return to the top-level Employer Home page at any time.

Data in some **tables in QUEST can be sorted by column**. Columns that can be used for sorting have a bold blue underlined column heading. Click the column heading to sort data in the table by that column.

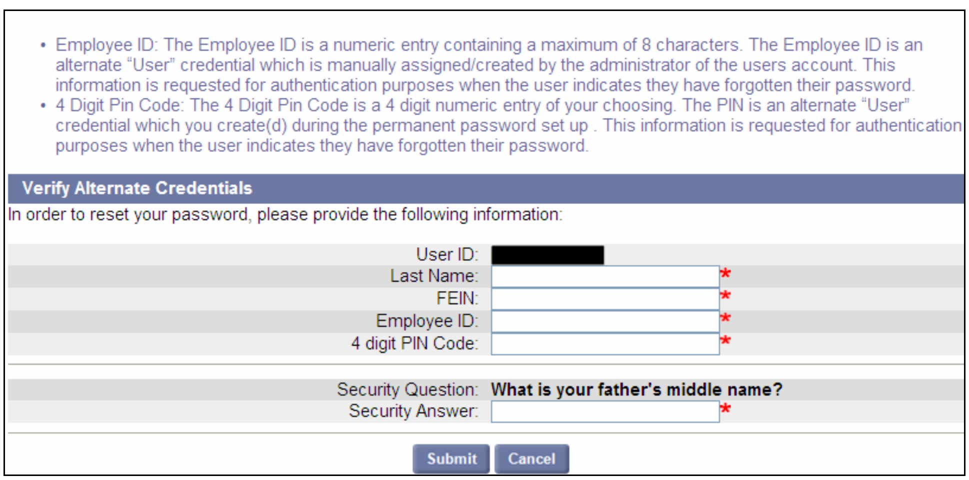
FORGOTTEN PASSWORD

NOTE: If you need to change your password because it has been forgotten, follow these instructions.

1. Navigate to www.mass.gov/uima, and click **Employer Login**.
2. The **Login** page appears. Click **Forgot Password**.

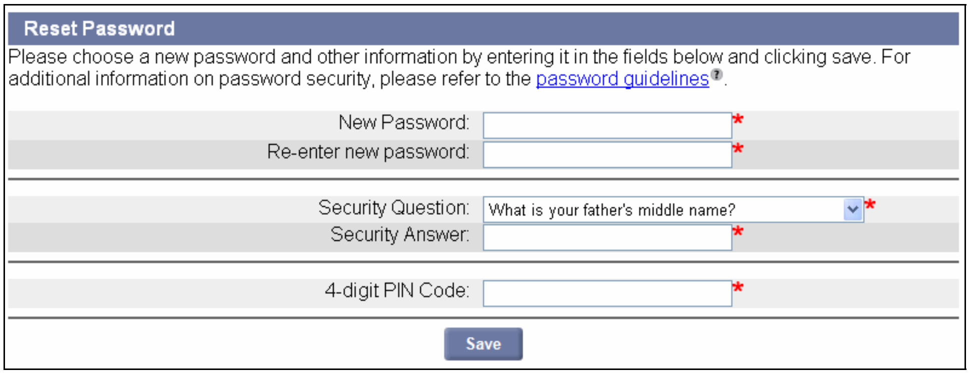
3. The **User ID** page appears. Enter your User ID and click **Next**.

4. The **Verify Alternate Credentials** page appears. Enter Last Name, FEIN, Employee ID, 4-digit PIN Code, and your Security Answer. Click **Submit**.



NOTE: If you are the user that **registered** the Employer, your Employee ID is set by default to the Employer Account Number (EAN), unless it was later changed. All other users should get their Employee ID from their System Administrator.

5. The **Reset Password** page appears. Enter a new password two times, and re-enter the security answer and the PIN Code. Click **Save**.



CHANGING A PASSWORD

If you wish to change your password while you are logged in to QUEST, click the **Change Password** link in the upper left corner.

Enter your old password, a new password, security answer, and PIN. Click **Save**.

Employer Registration

ABOUT EMPLOYER REGISTRATION

Introduction	This section describes how to **start** and **complete** an Employer registration. Employers who pay wages to anyone working or living within Massachusetts are required to **register** with and **report quarterly wage data** to the Department of Unemployment Assistance (DUA). This registration process will determine if you the Employer will be subject to Unemployment Insurance (UI) Contributions, and after successful registration it will provide access to the system through which Quarterly Wage records are reported. **NOTE:** The instructions in this section are only for Employers **registering for the first time with DUA**. If you have an existing account with DUA and have received a correspondence about activating your account on the QUEST system, please refer to the **Account Activation** section of this user guide for instructions. **IMPORTANT NOTE**: The person who registers the account is actually creating a user who is assigned the System Administrator role by default. This user has access to all information in the Employer's account and is able to make changes, perform transactions, add additional users to the account, and choose what permissions those users get. Therefore, the person chosen by an Employer to activate the account should be a highly trusted employee.
Required Information	The following information is required to complete the registration process: • Type of legal entity (sole proprietor, partnership, LLC, etc.) • Doing business as name (DBA) • Federal Employer Identification Number (FEIN) • State and date of formation or incorporation • Date that employees first performed services in Massachusetts • Owner/Officer information: SSN, FEIN, percent of ownership • North American Industry Classification System (NAICS) Code • Principal Business Activity performed in Massachusetts • Quarterly Gross Summary of wages paid to date • Number of employees currently on the payroll
Helpful Hints	The registration can be **started** and **completed** in separate sessions (though they don't need to be). When the steps involved in **starting the registration** have been performed, a **temporary user name** and **temporary password** are provided onscreen and corresponded to you. This password cannot be reset, but you can contact the DUA if you later forget it. Once the temporary user name and temporary password are issued, the system saves the information entered to that point. You can leave the session and resume where you left off for up to 30 days, using the procedure for returning to an Employer registration. **After 30 days**, the temporary user name and temporary password expire, and the information in the account is purged. If this happens, you must **restart** the

registration from the beginning.

When the registration is **completed**, a **permanent user name** and a **temporary password** are provided. The first time you log in using this user name, you will be asked to set a permanent password.

The **Employer Account Number** (EAN) is assigned when registration is complete.

The **Employee ID** of the user who performs the registration is the same as the EAN (though this can be changed later if desired).

The user who performs the registration is always given the Employer System Administrator role, with full privileges.

IMPORTANT NOTE: Communication Method for correspondence is selected during registration. This choice determines the default method for all official communications to you from DUA.

NOTE: The system times out after 30 minutes of inactivity. If steps involved in starting the registration are not completed and the temporary user name and temporary password are not issued before a timeout, the information is not saved. If this happens, you must **restart** the registration from the beginning.

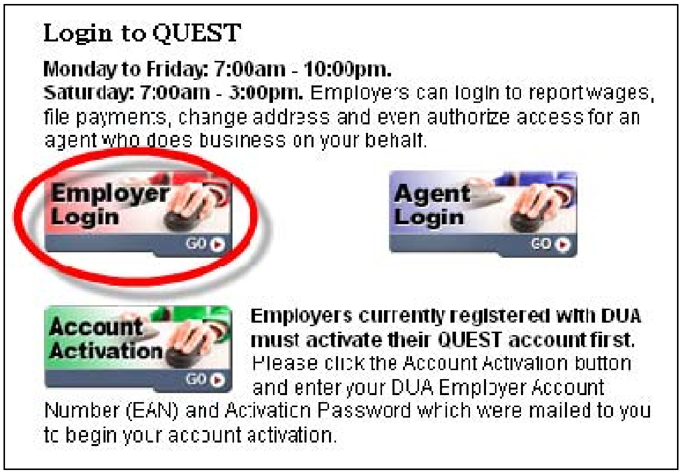
NOTE: When Registration is complete:

- Official Correspondence about the registration will be generated and transmitted to you.
- If you are a Non-Profit or Governmental organization, you will be assigned contributory status. However, your payment method will be changed to reimbursable if proof of 501(c)(3) status is received within 30 days.

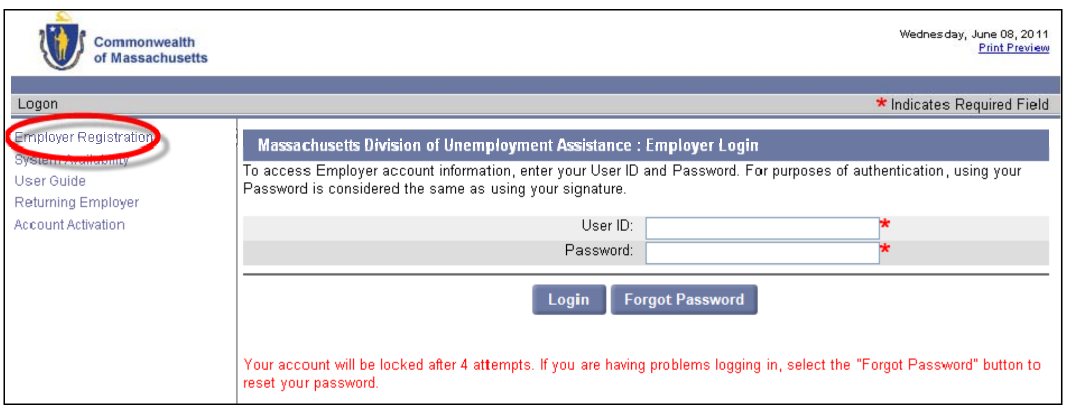
STARTING AN EMPLOYER REGISTRATION

The following steps show how an Owner, Officer or Authorized Employee can start the process of registering a business with the DUA.

1. Navigate to http://www.mass.gov/uima. Scroll to the **Login to QUEST** area. Click the **Employer Login** button.

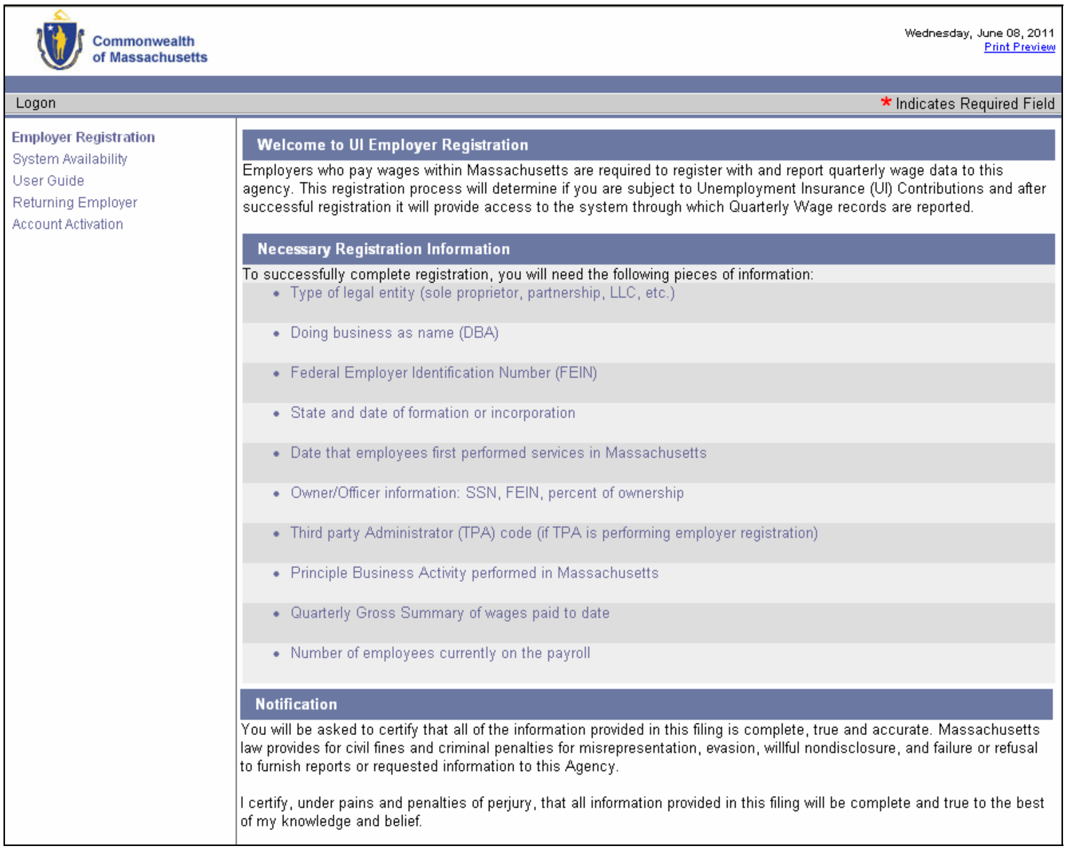


2. The Massachusetts Department of Unemployment Assistance: **Employer Login** page appears. Click the **Employer Registration** link.



3. The **Welcome to the UI Registration** page displays. Read the following onscreen sections for important information about the registration process:

   - **Welcome to UI Employer Registration** for a brief introduction.
   - **Necessary Registration Information** for the information you need to supply during registration.
   - **Notification** for information about certifying the information you provide.



Commonwealth of Massachusetts

Wednesday, June 08, 2011
Print Preview

Logon
* Indicates Required Field

Employer Registration
System Availability
User Guide
Returning Employer
Account Activation

Welcome to UI Employer Registration

Employers who pay wages within Massachusetts are required to register with and report quarterly wage data to this agency. This registration process will determine if you are subject to Unemployment Insurance (UI) Contributions and after successful registration it will provide access to the system through which Quarterly Wage records are reported.

Necessary Registration Information

To successfully complete registration, you will need the following pieces of information:

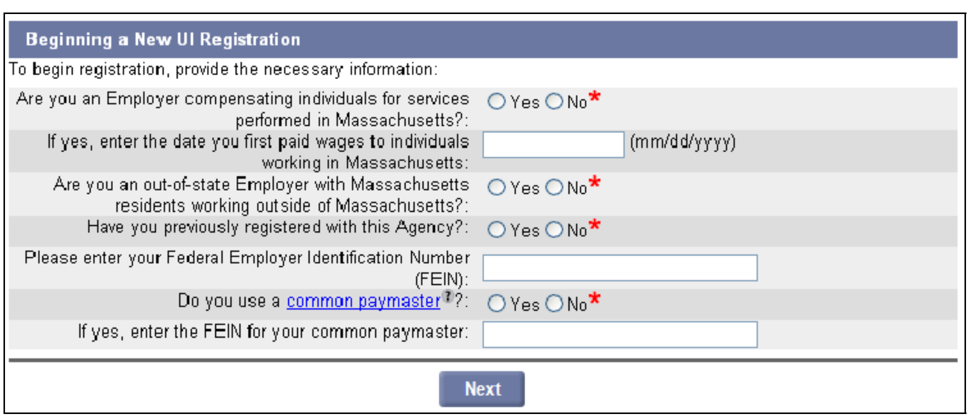
- Type of legal entity (sole proprietor, partnership, LLC, etc.)
- Doing business as name (DBA)
- Federal Employer Identification Number (FEIN)
- State and date of formation or incorporation
- Date that employees first performed services in Massachusetts
- Owner/Officer information: SSN, FEIN, percent of ownership
- Third party Administrator (TPA) code (if TPA is performing employer registration)
- Principle Business Activity performed in Massachusetts
- Quarterly Gross Summary of wages paid to date
- Number of employees currently on the payroll

Notification

You will be asked to certify that all of the information provided in this filing is complete, true and accurate. Massachusetts law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this Agency.

I certify, under pains and penalties of perjury, that all information provided in this filing will be complete and true to the best of my knowledge and belief.

4. On the same page, scroll to **Beginning a New UI Registration**, answer the questions on the page, and click **Next**.



Beginning a New UI Registration

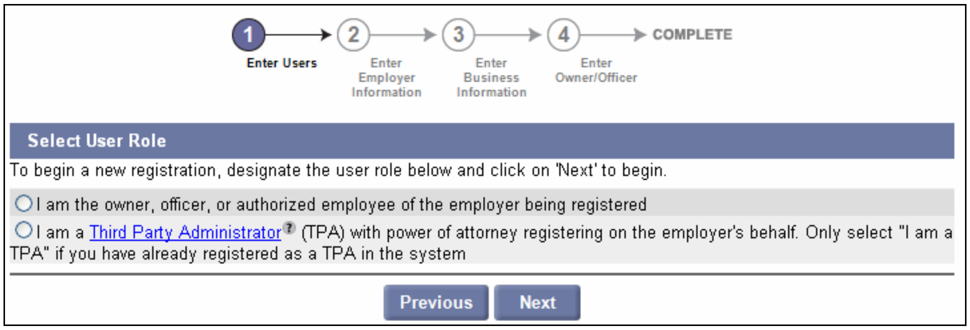
To begin registration, provide the necessary information:

Are you an Employer compensating individuals for services performed in Massachusetts?:	Yes No *
If yes, enter the date you first paid wages to individuals working in Massachusetts:	(mm/dd/yyyy)
Are you an out-of-state Employer with Massachusetts residents working outside of Massachusetts?:	Yes No *
Have you previously registered with this Agency?:	Yes No *
Please enter your Federal Employer Identification Number (FEIN):	
Do you use a common paymaster?:	Yes No *
If yes, enter the FEIN for your common paymaster:	

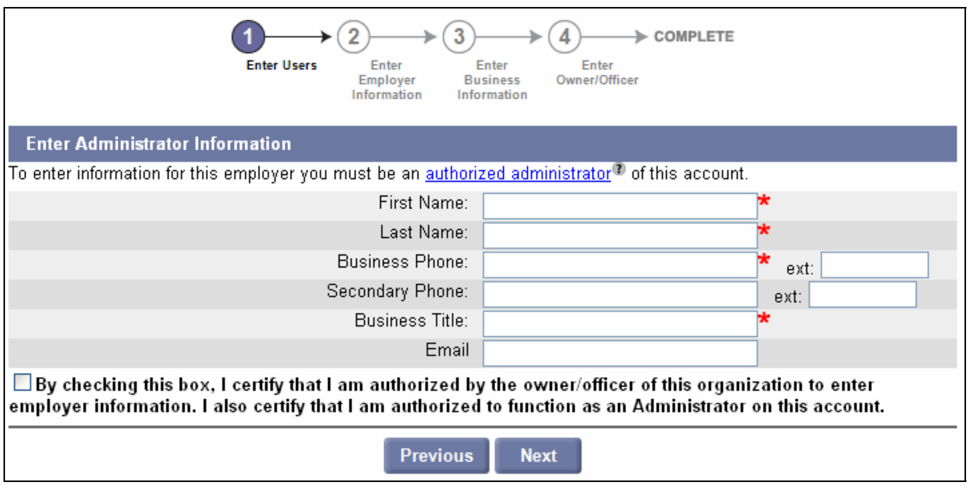
Next

5. On the **Select User Role** page, select the applicable role (owner, or authorized employee of the Employer being registered, or TPA) and click **Next**.

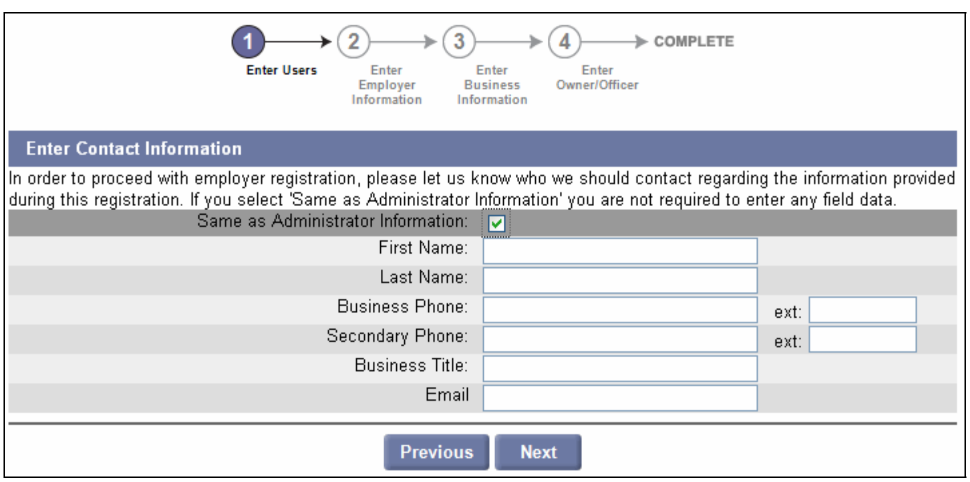
   NOTE: If you are a Third Party Administrator, select "I am a Third Party Administrator (TPA) with power of attorney registering on the Employer's behalf."



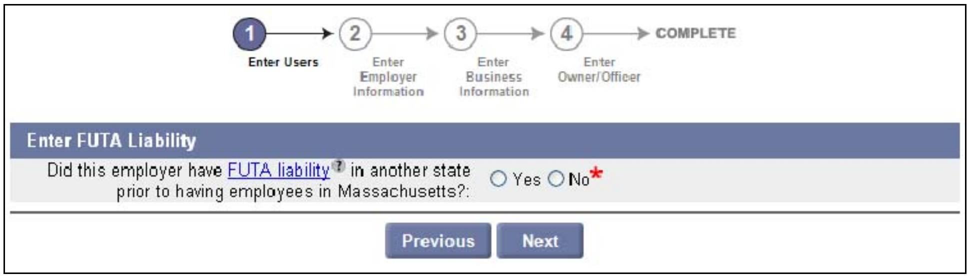
6. On the **Administrator Information** page, enter administrator information, check the box, and click **Next**.



7. On the **Contact Information** page, put a check in **Same as Administrator Information** box, or enter contact information if different, and click **Next**.



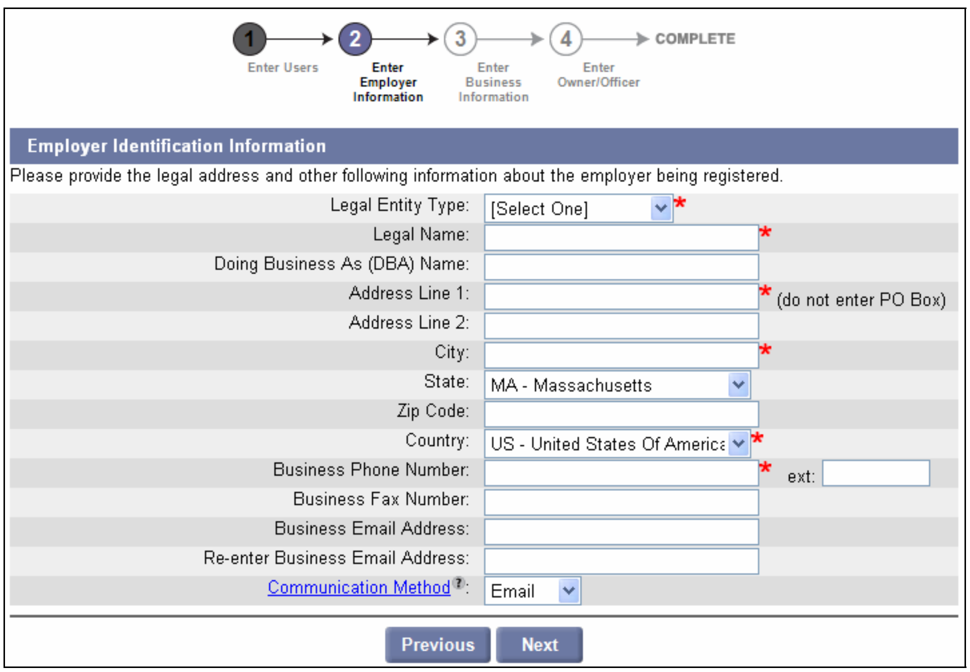
8. On the **Enter FUTA Liability** page, indicate whether the Employer has FUTA liability from another state by selecting Yes or No, and click **Next**.



9. In the **Employer Identification Information** page, enter legal, business, and address/email information. Select a Communication Method. Click **Next**.

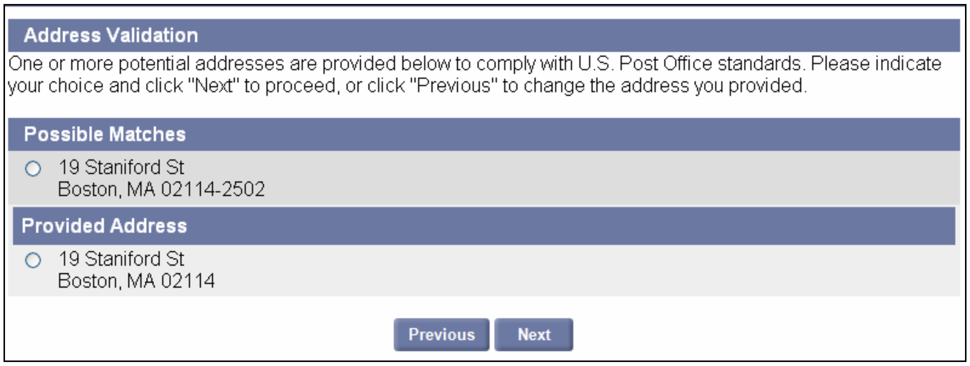
NOTE: Communication Method is always set to **Email** by default. The other choice is **US Mail.** Make sure to select your preferred communication method before proceeding.

NOTE: Select the Legal Entity type from the following: Sole Proprietor, Partnership, Corporation, Trust, LLC (single owner), LLC (partnership), LLC (corporation), or Governmental entity.

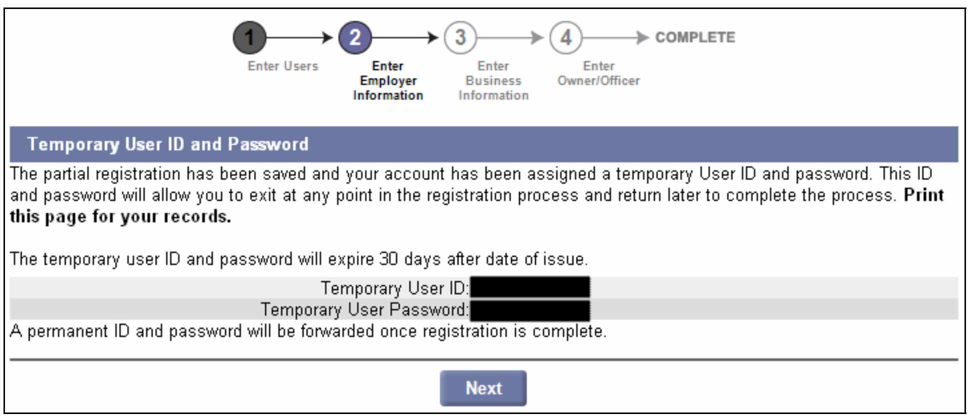


10. On the **Address Validation** page, select the address that is closest to your actual address. Click **Next**.

    NOTE: If applicable, select the address with the 9-digit extended Zip code (known as “Zip +4”).



Once the Temporary User ID and Temporary User Password display on the page, the Employer registration data is saved. You have up to 30 days to complete the registration.



11. **You must still complete the registration** before you can be issued an **EAN** and use the account.

    You can complete the registration without pausing, or stop at this point, and resume the process later.

    - To complete the registration **now**, click **Next**. Skip the next section in the document and go directly to *Completing an Employer Registration*.
    - To complete the registration **later**, start with the instructions in the next section: *Returning to an Employer Registration*.

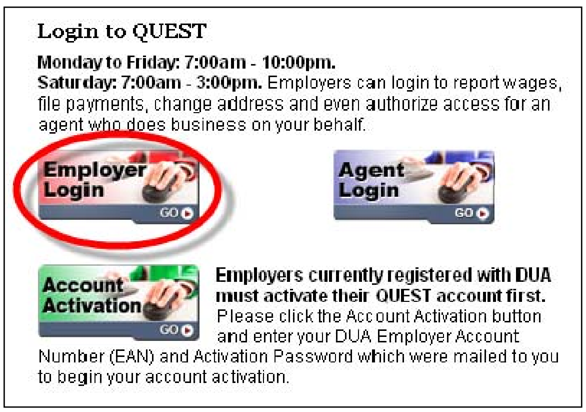
      IMPORTANT: Print or otherwise record the Temporary User ID and Temporary User Password in case you need them to access your account.

      IMPORTANT: The Temporary User ID and Temporary User Password you receive onscreen are **valid for 30 days**. If they are allowed to expire before you complete your Employer account registration, you must start the process from the beginning.

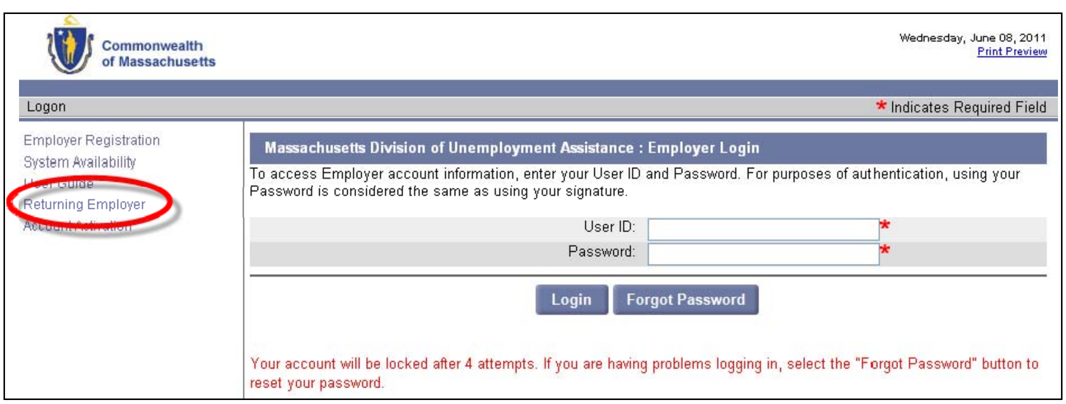
RETURNING TO AN EMPLOYER REGISTRATION

Introduction	If you **started an Employer registration** with the DUA (and received your Temporary User ID and Temporary User Password onscreen) but you **did not complete the registration in the same session**, you can return to the point where you stopped, by following the instructions in this section. **NOTE**: If you are still in the original registration session (and you still see the Temporary User ID and Temporary User Password onscreen), simply click **Next** to continue. Go directly to *Completing an Employer Registration* for instructions. **NOTE**: The Temporary User ID and Temporary User Password you receive when you create an account are **valid for 30 days**. If they expire, begin the process anew by performing the steps in *Starting an Employer Registration*.

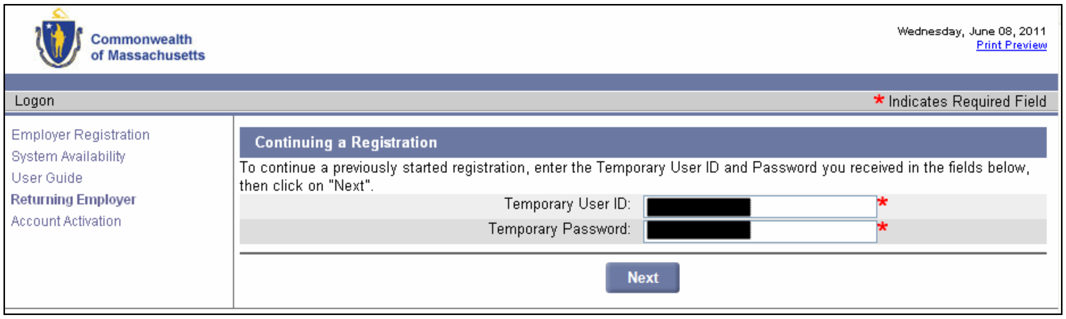
1. Navigate to http://www.mass.gov/uima. Scroll to the **Login to QUEST** area. Click the **Employer Login** button.



2. The **Massachusetts Department of Unemployment Assistance: Employer Login** page appears. Click the **Returning Employer** link.



3. The **Continuing a Registration** page appears. Enter the Temporary User ID and Temporary User Password you received when you started the registration. Click **Next**.



4. Continue to the next section, *Completing an Employer Registration*.

NOTE: If the Temporary User ID and Temporary Password do not work, it may be because it has been more than 30 days since the account was created. If this is the case, start the process from the beginning by following the instructions in *Starting an Employer Registration*.

COMPLETING AN EMPLOYER REGISTRATION

After an Employer account has been **started**, and the Temporary User ID and Temporary User Password have been established, the registration still needs to be **completed**.

Perform the following steps to **complete** the registration.

NOTE: If you interrupted the registration after the account was **started** but before the registration was **completed** (i.e., if you stopped after receiving the Temporary User ID and Temporary User Password), see the instructions in the section *Returning to a Pending Employer Registration* first.

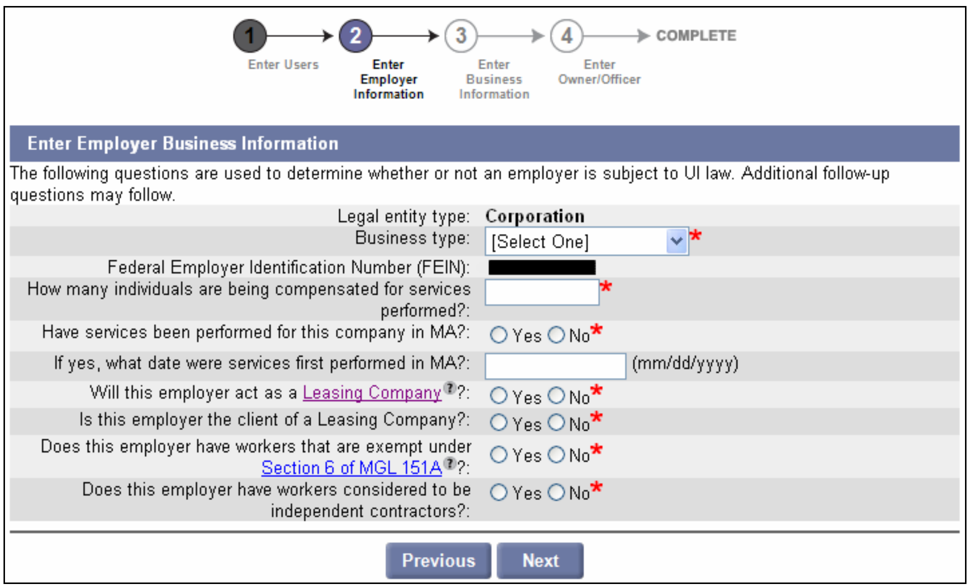
1. Perform the steps in *Starting an Employer Registration*, and (if necessary) *Returning to an Employer Registration*.

2. The **Enter Employer Business Information** page appears.

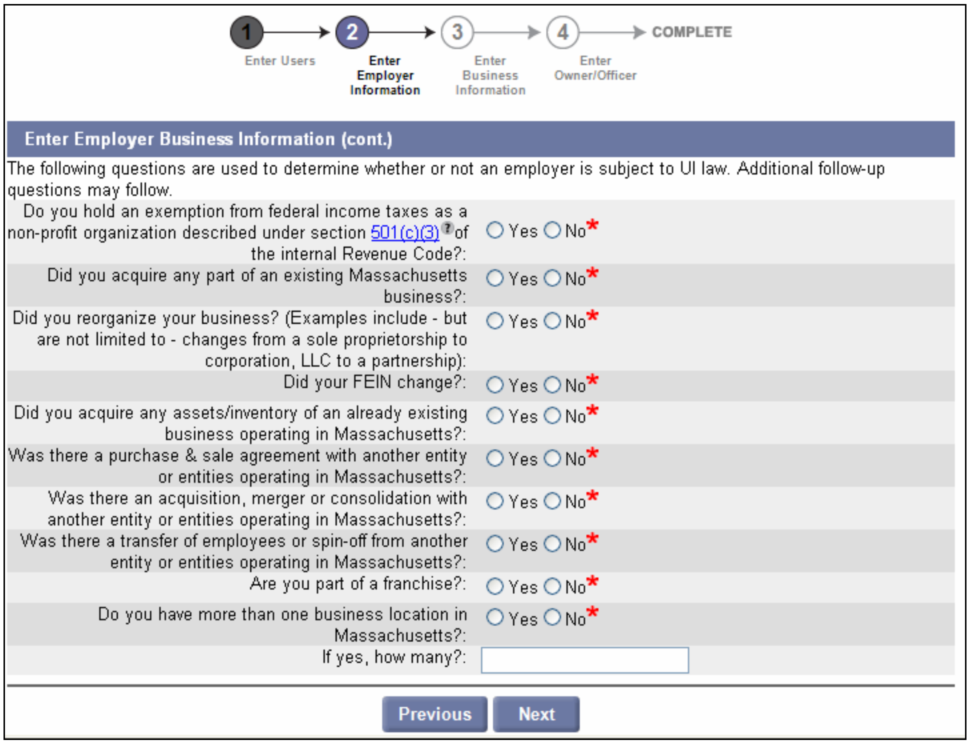
   a. Select a Business type (Agricultural, Domestic, Other, or Out-of-State).

   b. Answer the remaining questions.

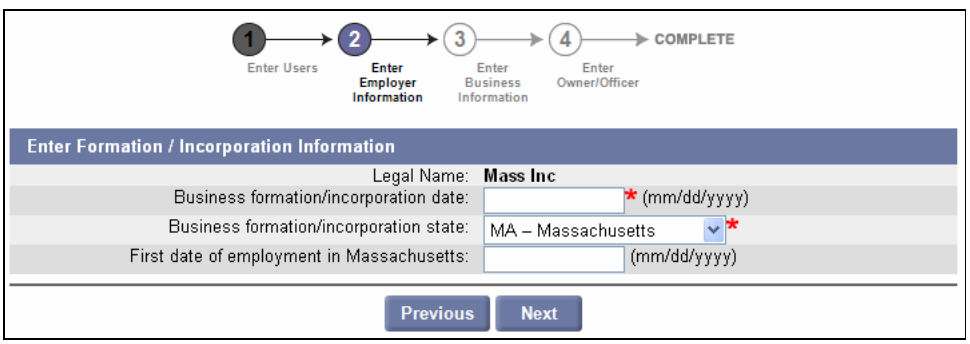
   c. Click **Next**.



3. The **Enter Employer Business Information (cont'd)** page appears. Answer the questions about your company and click **Next**.



4. Enter **Formation/Incorporation Information** and click **Next**.

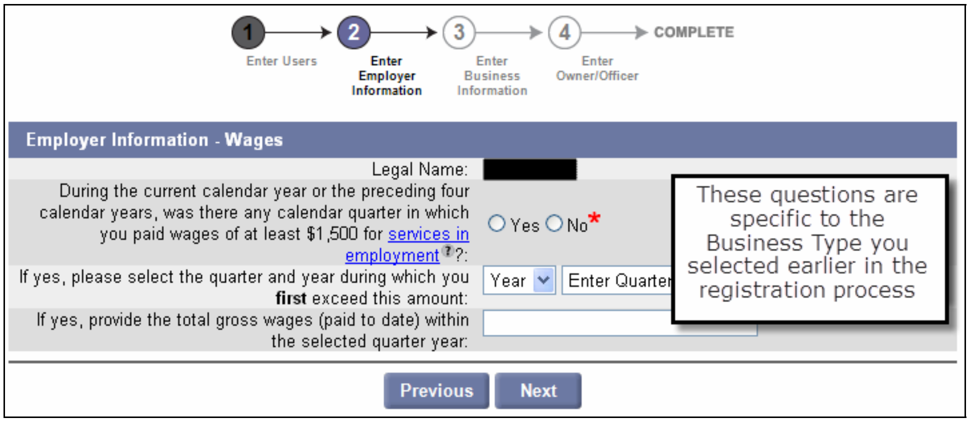


5. If you are **NOT** a Non-Profit or Governmental organization go to **Step 6**.

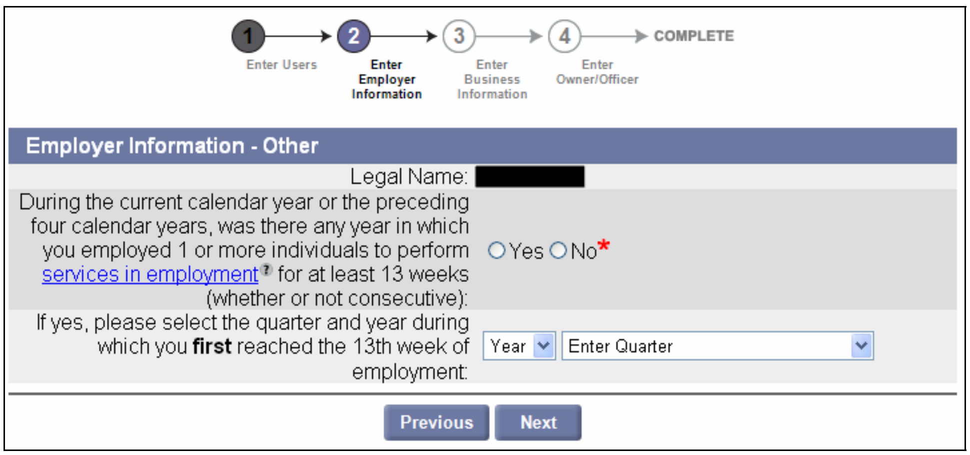
   If you **ARE** a Non-Profit or Governmental organization, go to **Step 8**.

6. The **Employer information – Wages** page appears. The questions on the page are specific to the Business Type you selected in **Step 2**. (This example shows what Employers who selected Business Type **Other** would see.)

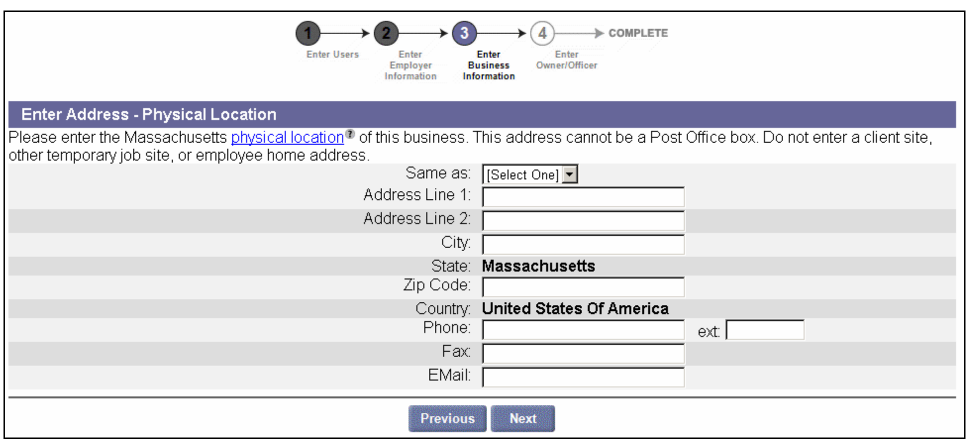
   Answer the questions on the page and click **Next**.



7. Depending on how you answered in **Step 6**, the **Employment Information – Other** page may appear. If it does, answer the questions on it, and click **Next**.

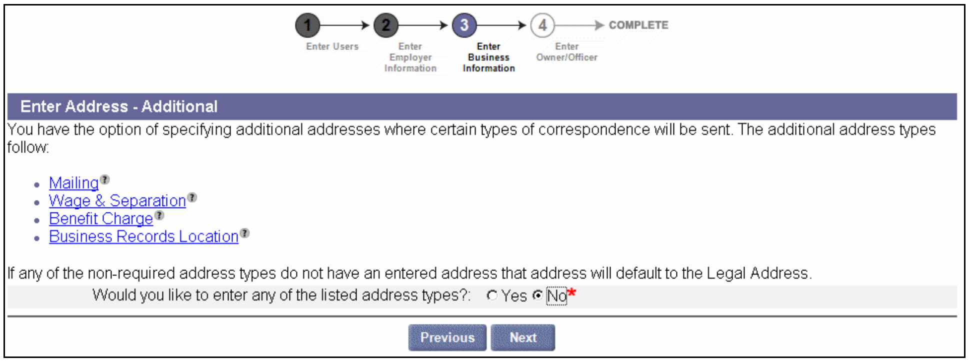


8. Depending on your Business Type and your previous answers, the **Enter Address – Physical Location** page may appear. If it does, fill in the fields and click **Next**.



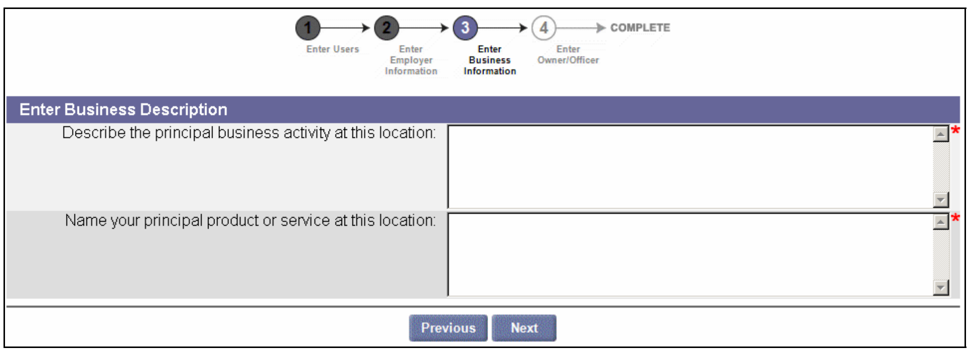
NOTE: If the physical address is the same as the legal address, select **Legal** in the **Same as** field, and skip to the next relevant field. However, Employers who don't have a physical address in Massachusetts should select **None**.

9. The **Enter Address – Additional** page appears. Select **Yes** if any of the following addresses – Mailing, Wage & Separation, Benefit Charge, or Business Records Location – are different than your Legal address; otherwise select **No**. Click **Next**.



NOTE: If you select **Yes** in **Step 9**, you will be prompted to address information for any applicable addresses, before **Step 10** appears.

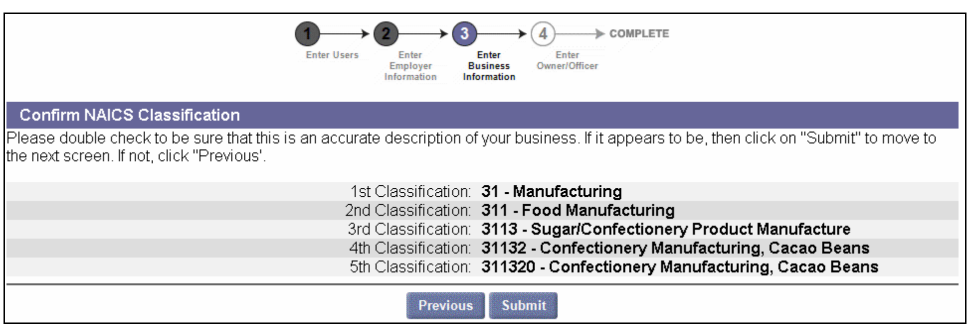
10. The **Enter Business Description** page appears. Fill in the principal business activity and principal product or service, and click **Next**.



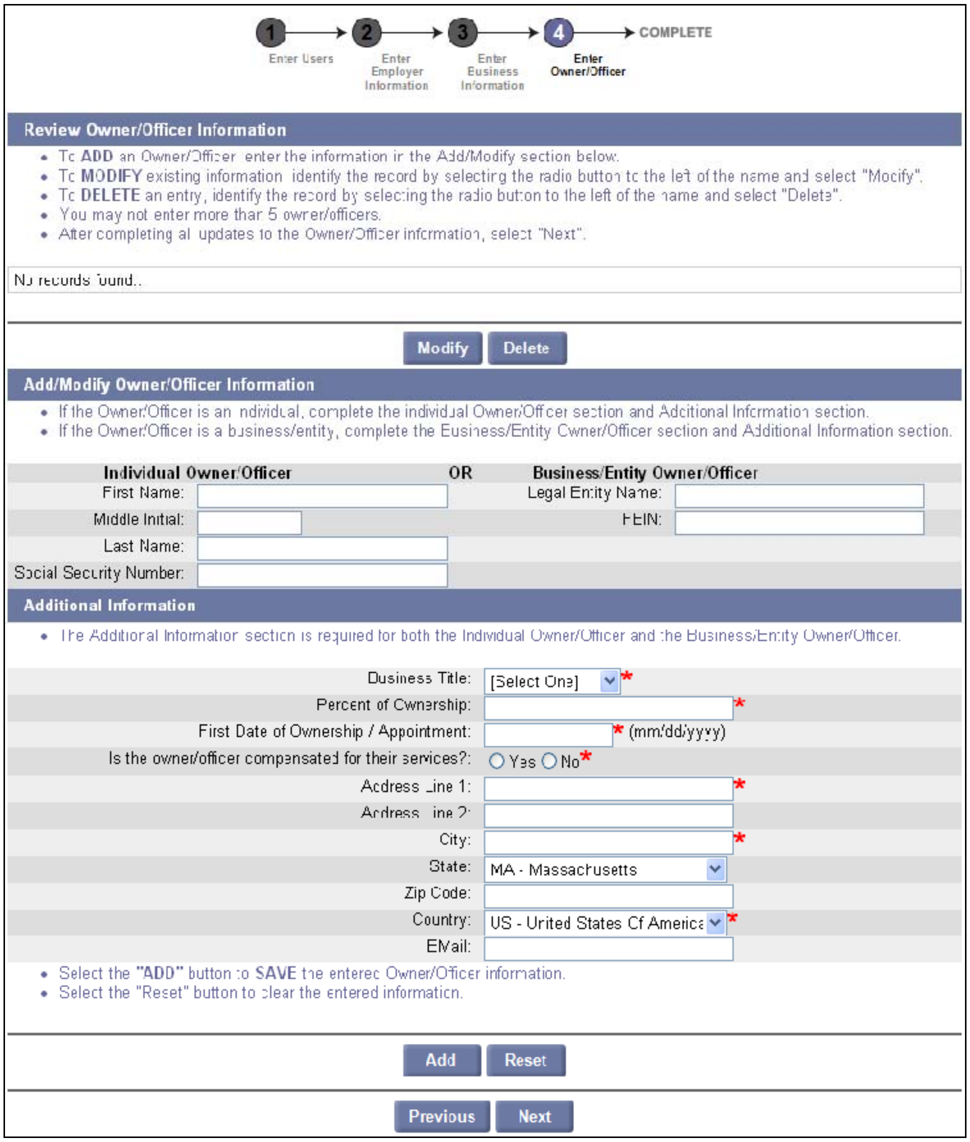
11. The **NAICS Classification** page appears. Select the 1st NAICS classification from the drop-down list and click **Next**. Select the 2nd, 3rd, 4th, and 5th classifications the same way. Click **Submit** once all five classifications have been added correctly.

NOTE: Some Religious organizations have NAICS code 813110.

NOTE: If you do not know your NAICS Classification, you can look it up from the following website: http://www.naics.com



12. The **Owner/Officer** page appears. Add, correct, or delete Owner/Officer entries using the instructions below.



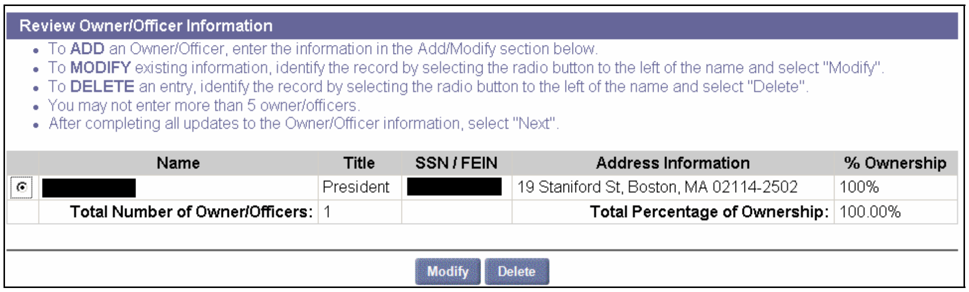
To add Owner/Officer entries:

- Enter the information into the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas.
- Click **Add** below the **Additional Information** area.
- Repeat for each new Owner/Officer entry you want to add.

IMPORTANT NOTE: Information about an Owner/Officer in the **Add/Modify Owner/Officer Information** area should either go under **Individual Owner/Officer** (left column) or **Business Entity Owner/Officer** (right column). Do not put information in both columns.

To modify/correct an Owner/Officer entry:

- Select the radio button to the left of an entry.
- Click **Modify**.
- Edit the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas.
- Click **Save** below the **Additional Information** area.
- Repeat for each existing Owner/Officer entry.



To delete an entry:

- Select the radio button to the left of that entry.
- Click **Delete**.

If necessary, clear the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas by clicking **Reset**. This does **not** delete saved entries.

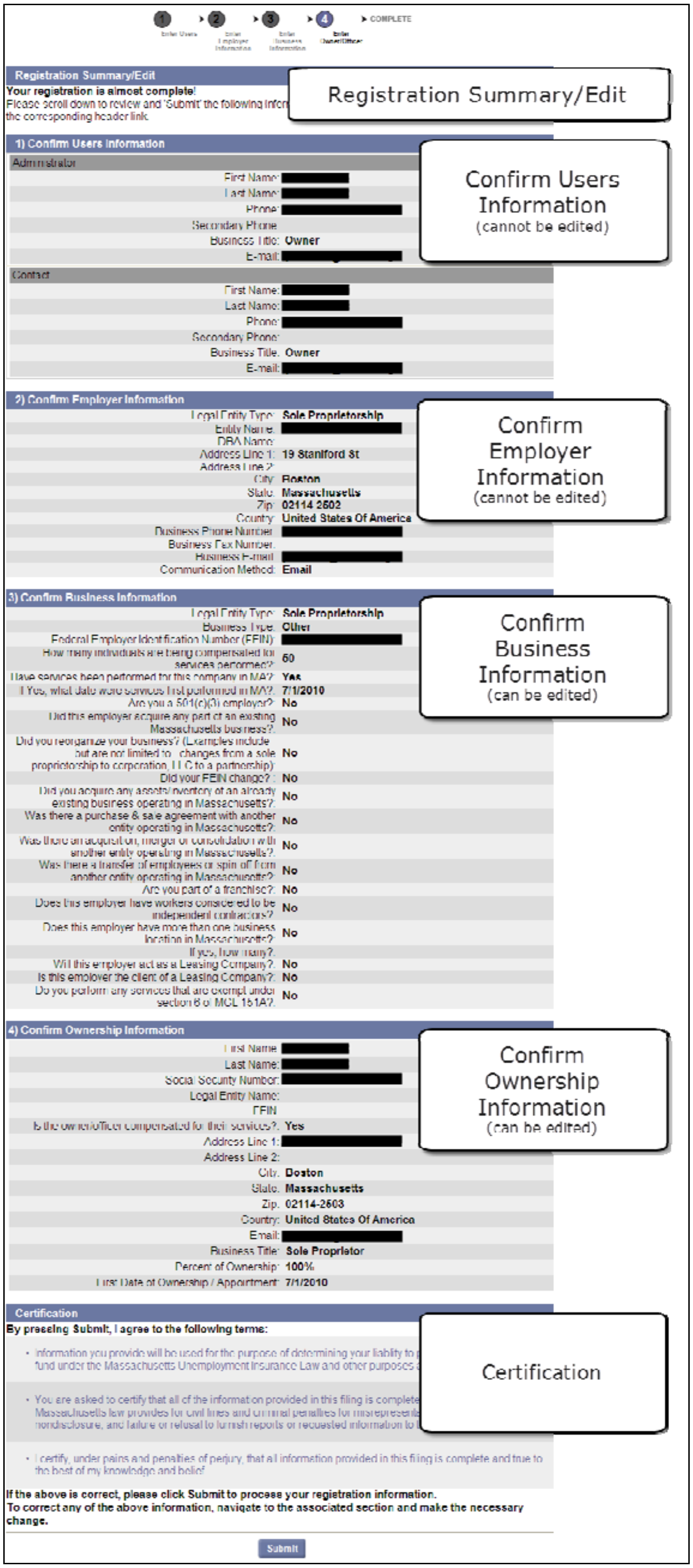
13. When the information on the page is complete, click **Next**.

14. The **Registration Summary/Edit** page appears. Review the information.

Business Information and Ownership Information can be edited if necessary. To return to the page where the information was originally input, double click the blue band behind the 3) Confirm Business Information label or the 4) Confirm Ownership Information label.

When the information is correct, proceed through the pages until you have reached the **Registration Summary/Edit** page again.

To complete the registration, click **Submit**.



1 Enter Users ▸ 2 Enter Employer Information ▸ 3 Enter Business Information ▸ 4 Enter Owner/Officer ▸ COMPLETE

Registration Summary/Edit

Registration Summary/Edit

Your registration is almost complete!
Please scroll down to review and 'Submit' the following infor
the corresponding header link.

1) Confirm Users Information

Confirm Users Information (cannot be edited)

Administrator

First Name:	[redacted]
Last Name:	[redacted]
Phone:	[redacted]
Secondary Phone:	
Business Title:	Owner
E-mail:	[redacted]

Contact

First Name:	[redacted]
Last Name:	[redacted]
Phone:	[redacted]
Secondary Phone:	
Business Title:	Owner
E-mail:	[redacted]

2) Confirm Employer Information

Confirm Employer Information (cannot be edited)

Legal Entity Type:	Sole Proprietorship
Entity Name:	[redacted]
DBA Name:	
Address Line 1:	19 Staniford St
Address Line 2:	
City:	Boston
State:	Massachusetts
Zip:	02114 2502
Country:	United States Of America
Business Phone Number:	[redacted]
Business Fax Number:	
Business E-mail:	[redacted]
Communication Method:	Email

3) Confirm Business Information

Confirm Business Information (can be edited)

Legal Entity Type:	Sole Proprietorship
Business Type:	Other
Federal Employer Identification Number (FEIN):	[redacted]
How many individuals are being compensated for services performed?:	50
Have services been performed for this company in MA?:	Yes
If Yes, what date were services first performed in MA?:	7/1/2010
Are you a 501(c)(3) employer?:	No
Did this employer acquire any part of an existing Massachusetts business?:	No
Did you reorganize your business? (Examples include but are not limited to: changes from a sole proprietorship to corporation, LLC to a partnership):	No
Did your FEIN change?:	No
Did you acquire any assets/inventory of an already existing business operating in Massachusetts?:	No
Was there a purchase & sale agreement with another entity operating in Massachusetts?:	No
Was there an acquisition, merger or consolidation with another entity operating in Massachusetts?:	No
Was there a transfer of employees or spin off from another entity operating in Massachusetts?:	No
Are you part of a franchise?:	No
Does this employer have workers considered to be independent contractors?:	No
Does this employer have more than one business location in Massachusetts?:	No
If yes, how many?:	
Will this employer act as a Leasing Company?:	No
Is this employer the client of a Leasing Company?:	No
Do you perform any services that are exempt under section 6 of MGL 151A?:	No

4) Confirm Ownership Information

Confirm Ownership Information (can be edited)

First Name:	[redacted]
Last Name:	[redacted]
Social Security Number:	[redacted]
Legal Entity Name:	
FEIN:	
Is the owner/officer compensated for their services?:	Yes
Address Line 1:	[redacted]
Address Line 2:	
City:	Boston
State:	Massachusetts
Zip:	02114-2503
Country:	United States Of America
Email:	[redacted]
Business Title:	Sole Proprietor
Percent of Ownership:	100%
First Date of Ownership / Appointment:	7/1/2010

Certification

Certification

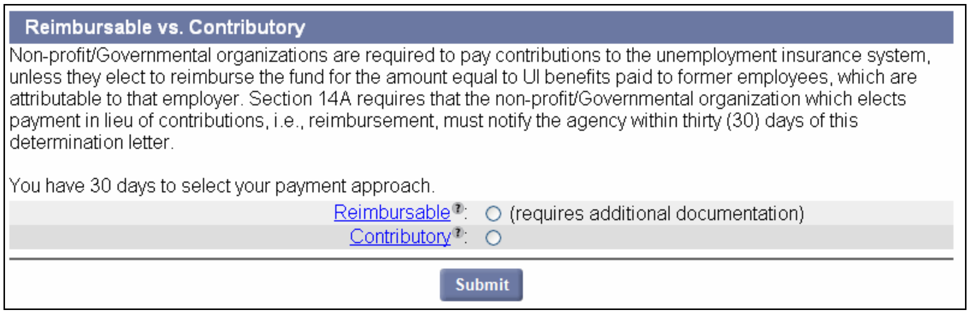
By pressing Submit, I agree to the following terms:

- Information you provide will be used for the purpose of determining your liability to
fund under the Massachusetts Unemployment Insurance Law and other purposes
- You are asked to certify that all of the information provided in this filing is complete
Massachusetts law provides for civil fines and criminal penalties for misrepresent
nondisclosure, and failure or refusal to furnish reports or requested information to
- I certify, under pains and penalties of perjury, that all information provided in this filing is complete and true to the best of my knowledge and belief

If the above is correct, please click Submit to process your registration information.
To correct any of the above information, navigate to the associated section and make the necessary change.

Submit

15. If you are a Non-Profit or Governmental organization, the **Reimbursable vs. Contributory** page appears. Select a payment approach and click **Submit**.

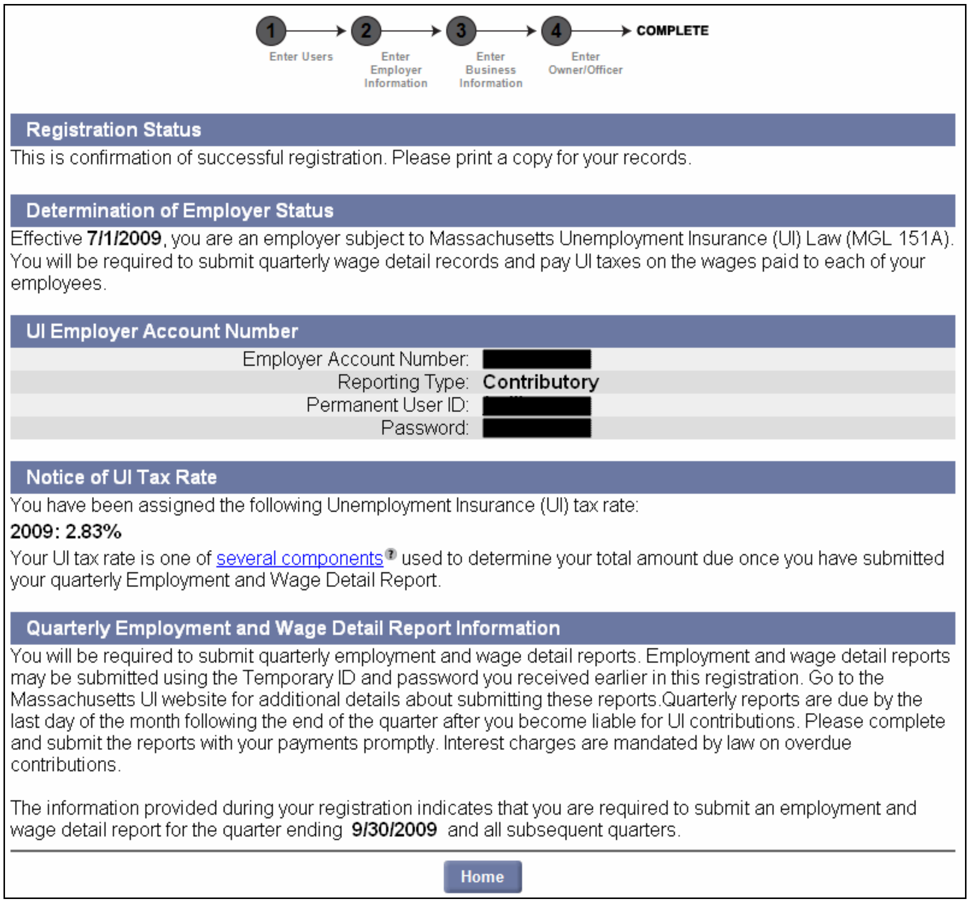


16. The **Registration Status** page appears. Registration is complete. If you indicated a transfer of experience, you will continue to the Experience Transfer process, where you provide historical information that is used for Rate Calculation (see the section *Provide information on the Purchase or Sale of a Business*). Otherwise, you can log in immediately by clicking **Home**, or close your browser and login later. See the section, *First Time Login After Registration* for instructions.

    IMPORTANT NOTES: The Registration Status page contains details about the Employer registration:

- **Confirmation** of the registration.
- The Determination of Employer Status, and (if applicable) the **effective date** at which the Employer is subject to Massachusetts Unemployment Law.
- UI **Employer Account number** (EAN).
- The permanent **User ID**.
- Temporary **password**.
- If you are subject to UI tax you will see one of the following:
    - Notice of UI Tax Rate (if you are a contributory Employer).
    - The **quarter end date** for which the Employer must submit an employment and wage detail report.
    - Obligations of Employers Selecting the UI Reimbursement Method (if you are a reimbursable Employer).
- If you are not subject to UI tax, a Non-Subject Employer Information area.

Example: The **Registration Status** page for a newly registered contributory Employer.


1 Enter Users → 2 Enter Employer Information → 3 Enter Business Information → 4 Enter Owner/Officer → COMPLETE

Registration Status

This is confirmation of successful registration. Please print a copy for your records.

Determination of Employer Status

Effective **7/1/2009**, you are an employer subject to Massachusetts Unemployment Insurance (UI) Law (MGL 151A). You will be required to submit quarterly wage detail records and pay UI taxes on the wages paid to each of your employees.

UI Employer Account Number

Employer Account Number:	[redacted]
Reporting Type:	**Contributory**
Permanent User ID:	[redacted]
Password:	[redacted]

Notice of UI Tax Rate

You have been assigned the following Unemployment Insurance (UI) tax rate:

2009: 2.83%

Your UI tax rate is one of several components used to determine your total amount due once you have submitted your quarterly Employment and Wage Detail Report.

Quarterly Employment and Wage Detail Report Information

You will be required to submit quarterly employment and wage detail reports. Employment and wage detail reports may be submitted using the Temporary ID and password you received earlier in this registration. Go to the Massachusetts UI website for additional details about submitting these reports.Quarterly reports are due by the last day of the month following the end of the quarter after you become liable for UI contributions. Please complete and submit the reports with your payments promptly. Interest charges are mandated by law on overdue contributions.

The information provided during your registration indicates that you are required to submit an employment and wage detail report for the quarter ending **9/30/2009** and all subsequent quarters.

Home

First Time Login After Registration

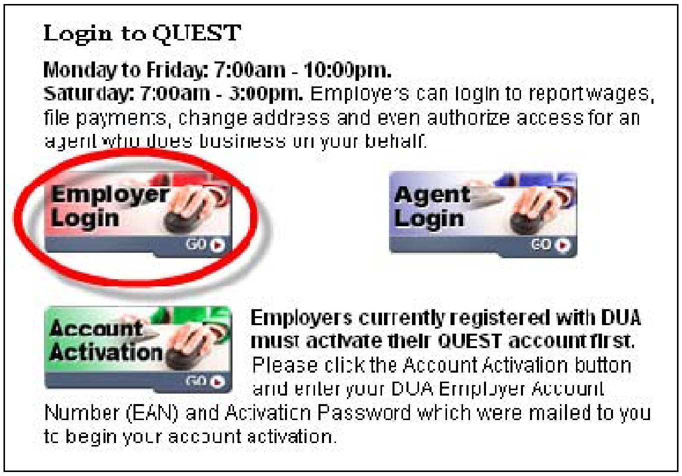
This section applies only if you are logging in for the ***first time*** after completing the initial **Employer registration**. It describes how to change the QUEST-generated password and establish your security question and PIN.

(If you have previously logged in using these instructions, then you should follow the regular log in procedure in the section, *Logging In*.)

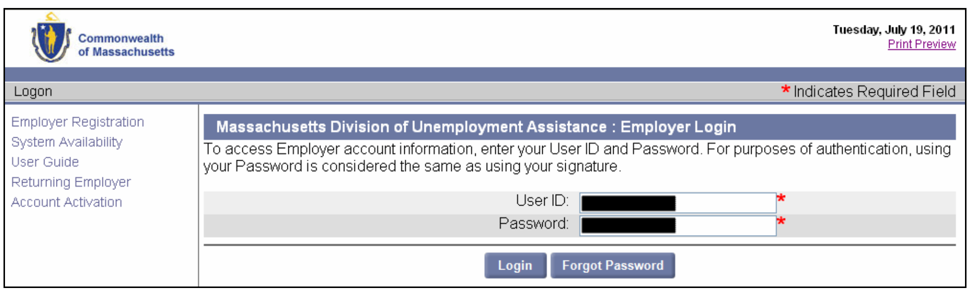
1. If you just registered your account and you just clicked **Home**, skip to **Step 3**.

   If you closed your browser before logging in, navigate to the DUA – QUEST webpage at www.mass.gov/uima.

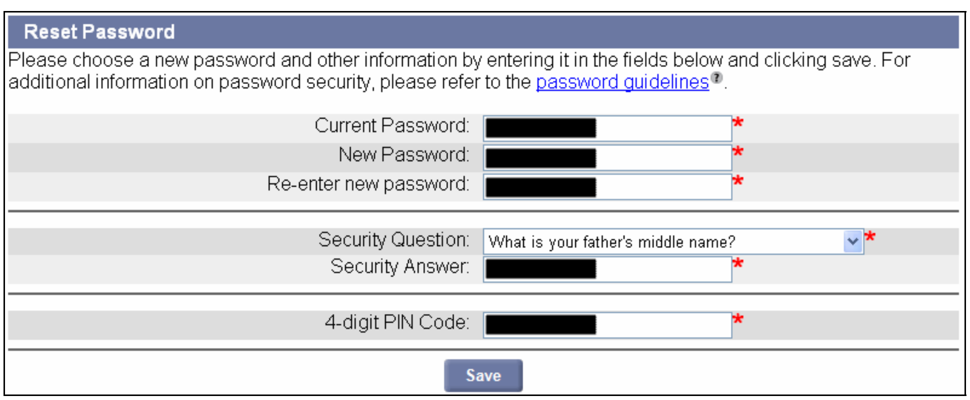
2. Scroll to the QUEST area of the page. Click **Employer Login**.



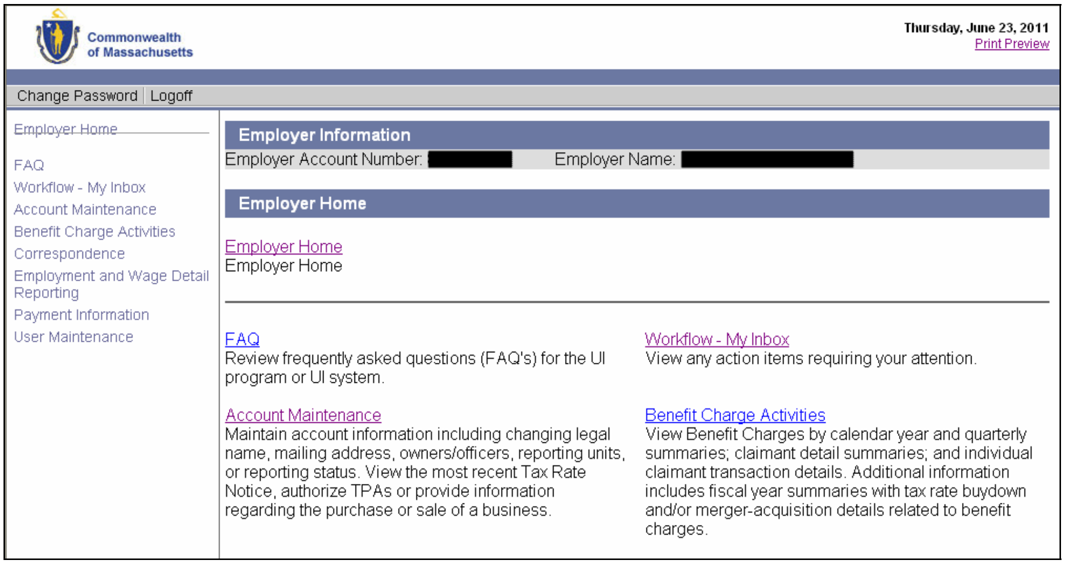
3. In the **Employer Login** page, enter the User ID and Password you received onscreen or by U.S. mail when you completed the registration. Click **Login**.



4. The **Reset Password** page appears. Enter the current password and new password, select a security question, answer the question, and enter a 4-digit PIN code. Click **Save** to continue.



5. When the **Employer Home** page appears you have successfully changed your password and logged into the QUEST system.



Account Activation

ABOUT ACCOUNT ACTIVATION

Introduction	**NOTE**: Account Activation only applies to Employers who were doing business with DUA *before* December 7, 2009.

The QUEST system for Employers was rolled out on December 7, 2009. Almost every Employer who was *already* conducting business with DUA before that date was automatically set up with an account in QUEST. However, before you can use the account that was created for you, you must **activate** it.

If you need to activate your account, you should have received a communication from DUA (via US mail or other method) that included a **temporary password**. (Call 617-626-5075 if this information is not available.)

The temporary user ID is simply the **DUA Employer ID** you used before QUEST was introduced. You may also know this ID as your **State Unemployment Insurance** (SUI) Number. In the QUEST software, this number is referred to as the Massachusetts **Employer Account Number** (EAN).

Before beginning the activation process, also gather the following information:

- Federal Employer Identification Number (FEIN)
- Business contact information (addresses, phone, email)
- Owner/Officer contact information (name, SSN, home address, and phone)

Follow the instructions in this section to activate your account.

Once the account has been activated, a permanent User ID and a QUEST-generated password will be provided.

The first time you log into the account with the permanent User ID, you will also be prompted to change the QUEST-generated password to one of your own choosing.

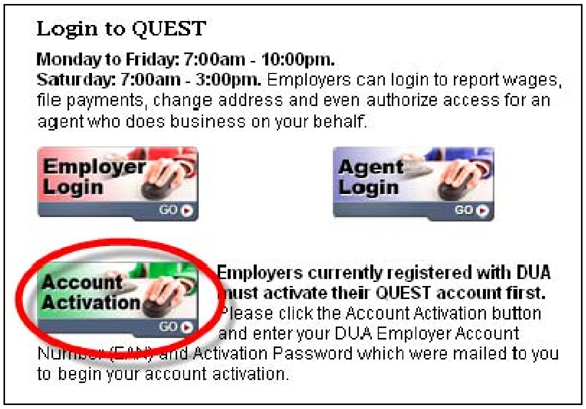
IMPORTANT NOTE: The person who activates the account is actually creating a user who is assigned the System Administrator role by default. This user has access to all information in the Employer's account and is able to make changes, perform transactions, add additional users to the account, and choose which permissions those users get. Therefore, the person chosen by the Employer to activate the account should be a highly trusted employee.

PERFORMING THE ACCOUNT ACTIVATION

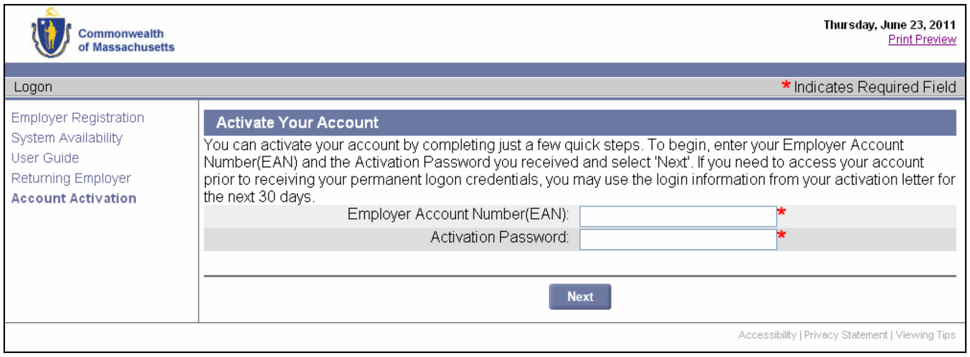
Perform the following steps to activate an account.

1. Go to www.mass.gov/uima

2. Scroll to the QUEST area of the page. Click the **Account Activation** button.

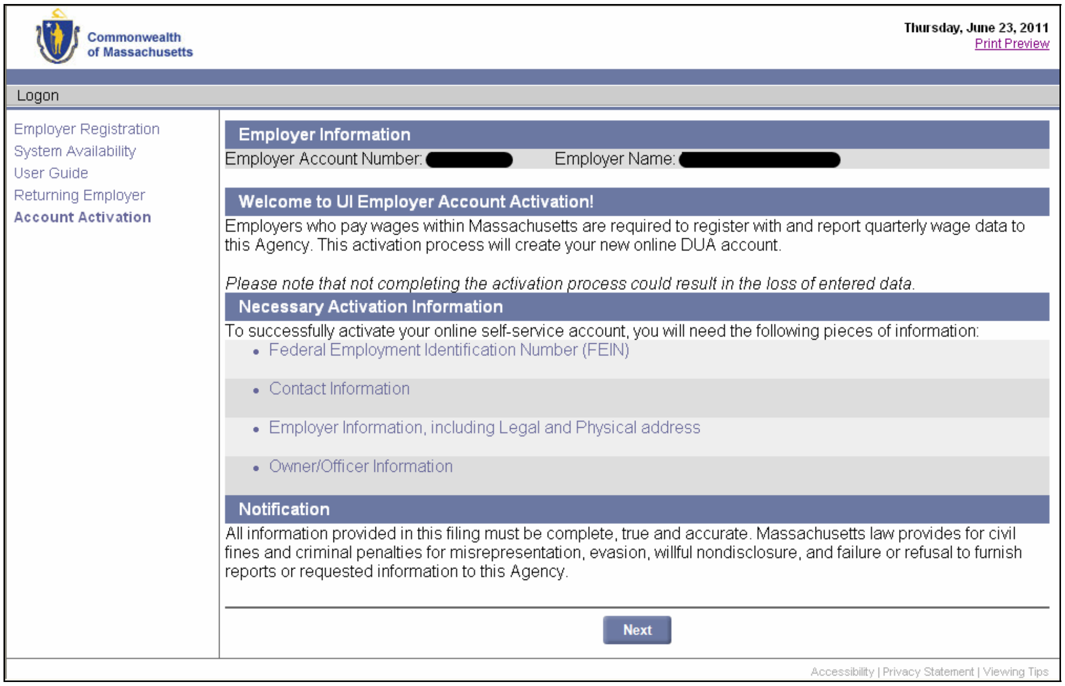


3. The **Activate Your Account** page appears.

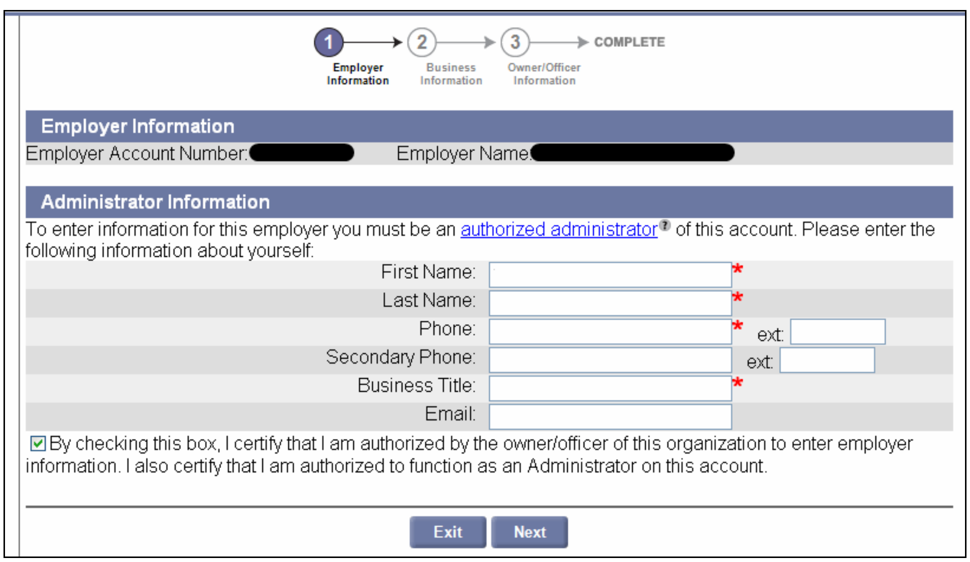


- Enter your **Employer Account Number** without dashes. You may know this number as your DUA Employer ID or your State Unemployment Insurance (SUI) Number.
- Enter the **Activation Password** that was provided to you.
- Click **Next** to continue.

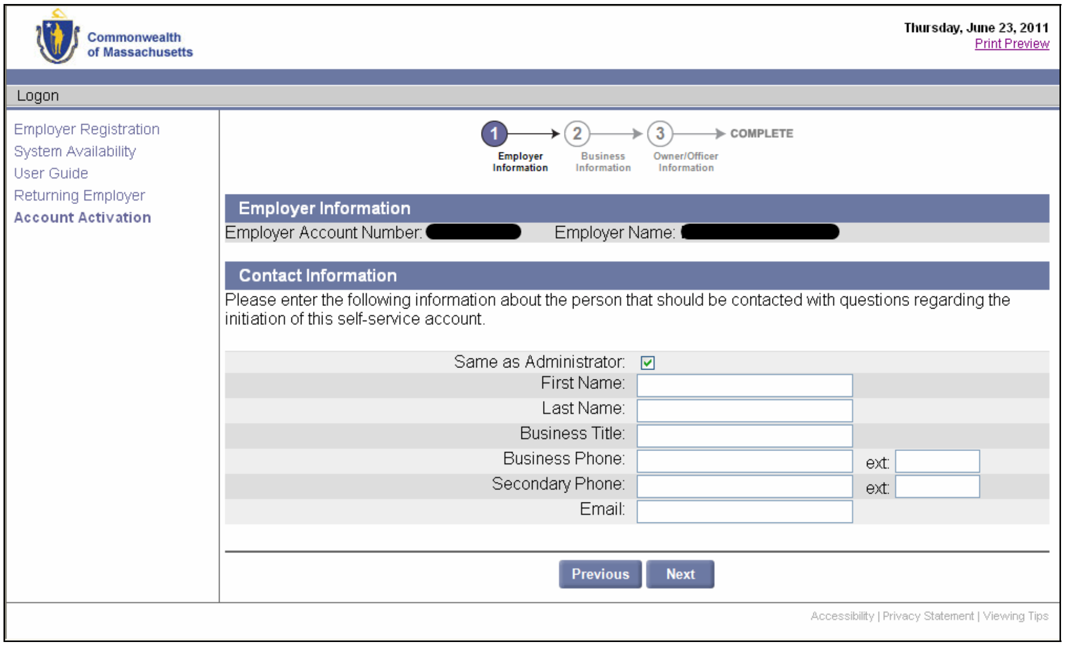
4. The **Welcome** page appears. Your **Employer Account Number** and **Employer Name** display at the top of the page. Read the information on the page and click **Next** to continue.



5. The **Administrator Information** page appears. Enter the requested information, check the box to certify that you are authorized, and click **Next** to continue.

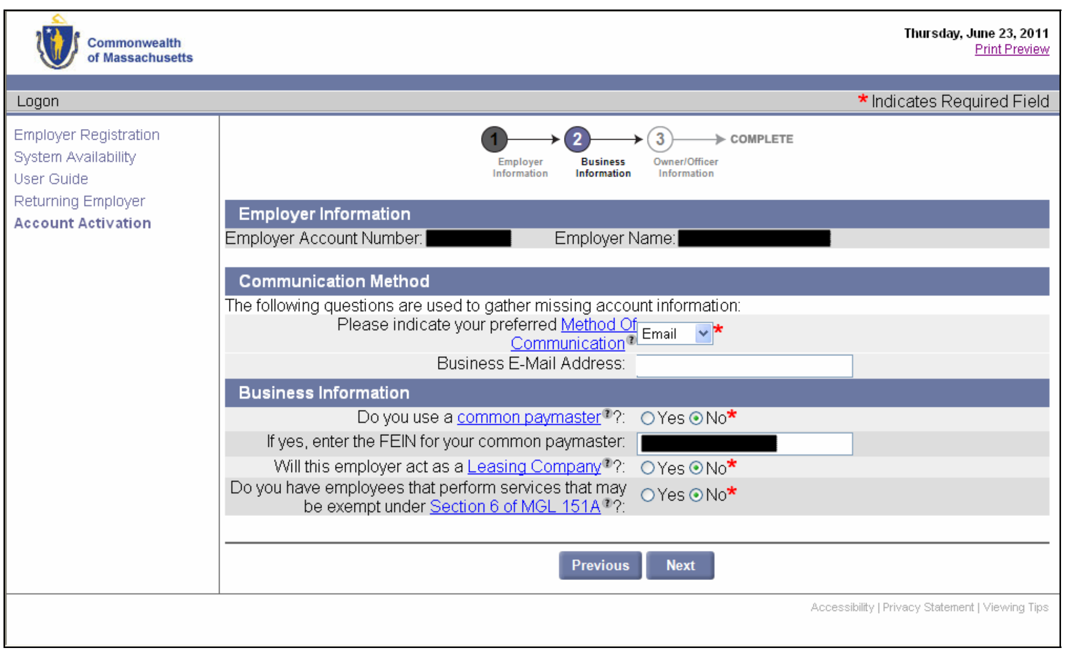


6. The **Contact Information** page appears. Enter the requested information **or** put a check next to **Same as Administrator**. Click **Next** to continue.

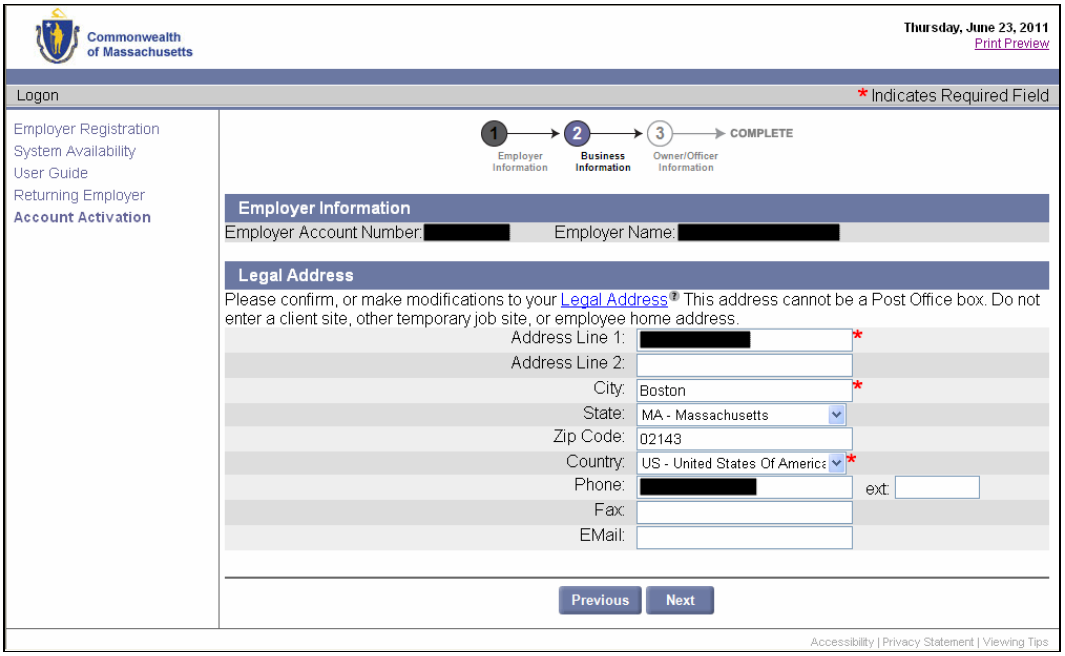


7. The **Communication Method / Business Information** page appears. Select Email or US Mail, enter an email address if applicable, answer the business questions, and click **Next**.

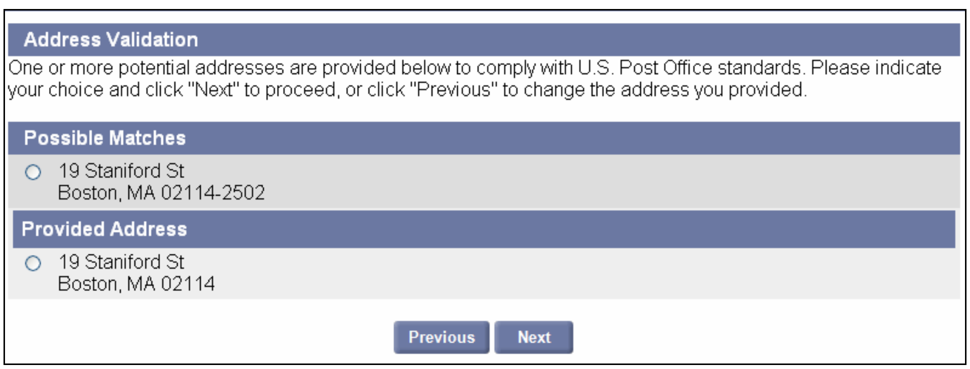
   IMPORTANT NOTE: The Communication Method you choose at this point determines the default method for all official communications to you from DUA.



8. The **Legal Address** page appears. The address that DUA has on file is displayed. Edit the address if necessary. Click **Next** to continue.

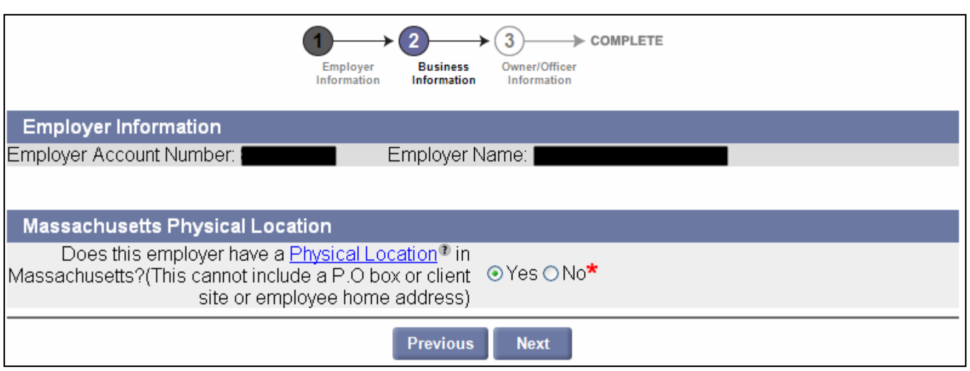


9. The **Address Validation** page appears. Select the address that is closest to your actual address. Click **Next**.

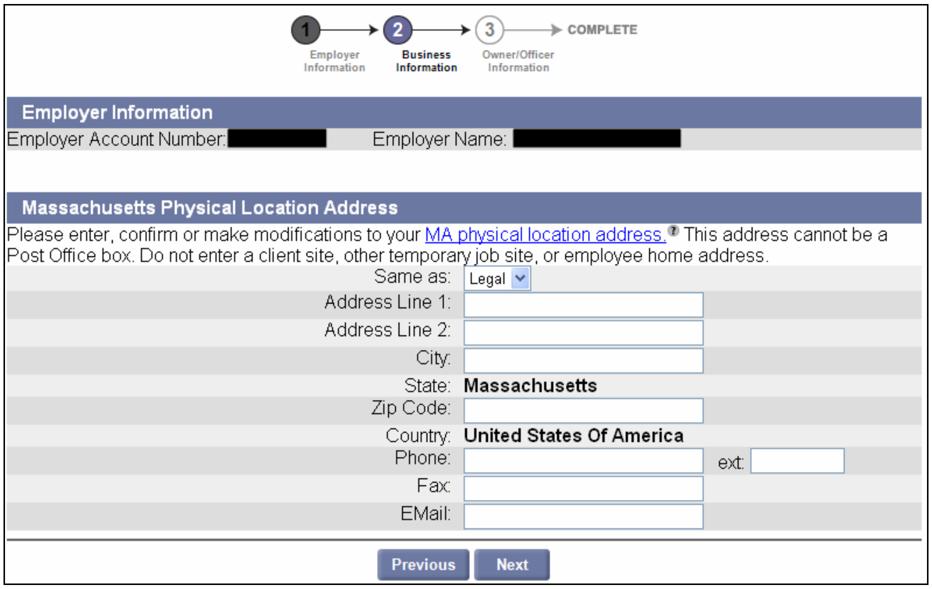


NOTE: If applicable, select the address with the 9-digit extended Zip code (known as "Zip +4").

10. The **Physical Location** page appears. Indicate whether your business has a presence in Massachusetts, and click **Next** to continue. (If you answer No, skip to **Step 12**.)



11. The **Massachusetts Physical Location Address** page appears. Enter or correct your Massachusetts address **OR** select an address type from the **Same as** box. Click **Next**.



12. The **Owner/Officer** page appears (see figure on next page).

- Review any Owner/Officer entries in the **Review Owner/Officer Information** section.
  - If an entry needs correction, or the percentage of ownership is blank:
    - Select the radio button to the left of that entry.
    - Click **Modify**.
    - Edit the fields in **Add/Modify Owner/Officer Information** and **Additional Information**.
    - Click **Save** below the **Additional Information** area.
    - Repeat for each existing Owner/Officer entry.
  - If an entry should be deleted:
    - Select the radio button to the left of that entry.
    - Click **Delete**.
- If no Owner/Officer information appears, or if you need to add more Owner/Officer entries:
  - Enter the information into the fields in **Add/Modify Owner/Officer Information** and **Additional Information**.
  - Click **Add** below the **Additional Information** area.
  - Repeat for each new Owner/Officer entry you want to add.

- At any point, you can clear the fields in **Add/Modify Owner/Officer Information** and **Additional Information** by clicking **Reset**. This does not delete saved entries.

- When all information listed in **Review Owner/Officer Information** is correct, click **Next**.

IMPORTANT NOTE: Information about an Owner/Officer in the **Add/Modify Owner/Officer Information** area should *either* go under **Individual Owner/Officer** (left column) *or* **Business Entity Owner/Officer** (right column). Do not put information in both columns.

IMPORTANT NOTE: A maximum of five (5) Owner/Officers can be listed with an Employer account.

1 → 2 → 3 → COMPLETE

Employer Information | Business Information | **Owner/Officer Information**

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Review Owner/Officer Information

- To **ADD** an Owner/Officer, enter the information in the Add/Modify section below.
- To **MODIFY** existing information, identify the record by selecting the radio button to the left of the name and select "Modify".
- To **DELETE** an entry, identify the record by selecting the radio button to the left of the name and select "Delete".
- You may not enter more than 5 owner/officers.
- After completing all updates to the Owner/Officer information, select "Next".

	Name	Title	SSN/FEIN	Address Information	% Ownership
○*	Roger [redacted]	President	[redacted]	19 Staniford St. Boston	99.00%
○*	Tony [redacted]	Partner	[redacted]	19 Staniford St. Boston	1.00%
	Total Number of Owner/Officers:	2		**Total Percentage of Ownership:**	**100.00%**

Modify | Delete

Add/Modify Owner/Officer Information

- If the Owner/Officer is an individual, complete the individual Owner/Officer section and Additional Information section.
- If the Owner/Officer is a business/entity, complete the Business/Entity Owner/Officer section and Additional Information section.

Individual Owner/Officer		**OR**	**Business/Entity Owner/Officer**	
First Name:			Legal Entity Name:	
Middle Initial:			FEIN:	
Last Name:				
Social Security Number:				

Additional Information

- The Additional Information section is required for both the Individual Owner/Officer and the Business/Entity Owner/Officer.

Business Title:	[Select One] *
Percent of Ownership:	*
First Date of Ownership / Appointment:	* (mm/dd/yyyy)
Is the owner/officer compensated for their services?:	○ Yes ○ No*
Address Line 1:	*
Address Line 2:	
City:	*
State:	MA - Massachusetts
Zip Code:	
Country:	US - United States Of Americ *
EMail:	

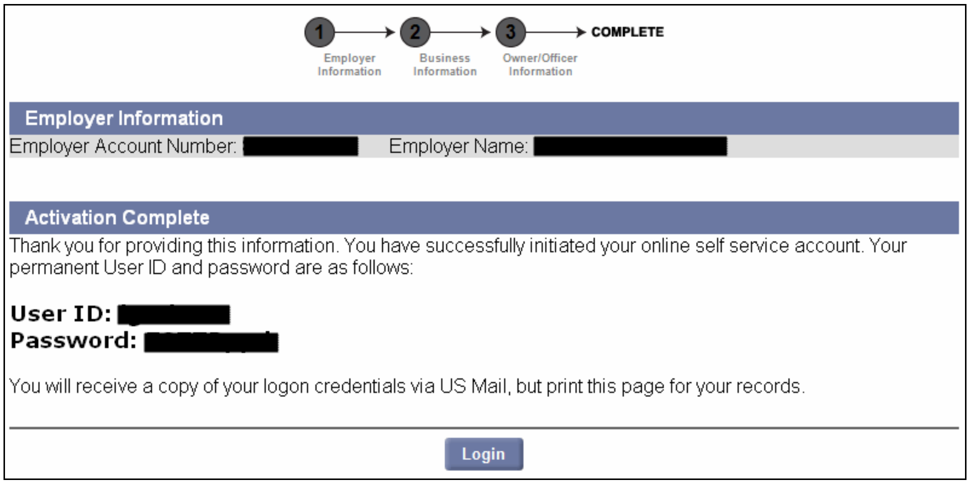
- If modifying an existing Owner/Officer, select **"SAVE"** button to **SAVE** the entered information.
- If adding an existing Owner/Officer, select **"ADD"** button to **SAVE** the entered information.
- Select the "Reset" button to clear the entered information.

Add | Reset

Previous | Next

13. The **Activation Complete** page appears. It provides a permanent **User ID** and a temporary **password**. You can log in immediately by clicking **Login**, or close your browser and login later. See the section, *First Time Login After Account Activation* for instructions.

    IMPORTANT NOTE: Print the page or otherwise record the User ID and Password.



First Time Login After Account Activation

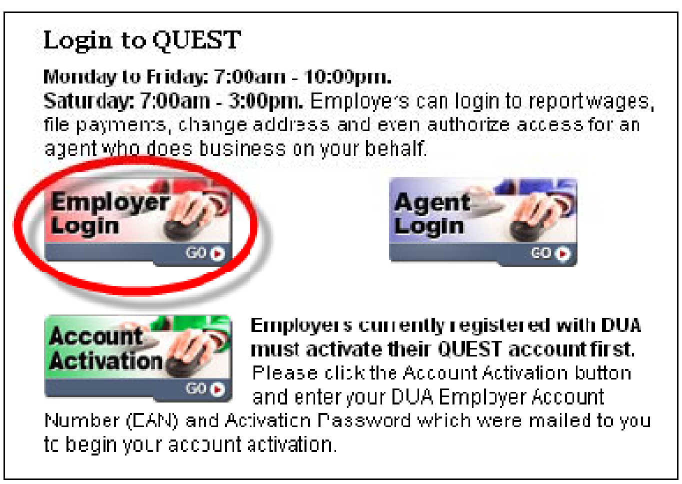
This section applies only if you are logging in for the ***first time*** after completing the account **activation**. It describes how to change the QUEST-generated password and establish your security question and PIN.

(If you have previously logged in using these instructions, then you should follow the regular log in procedure in the section: *Logging In*.)

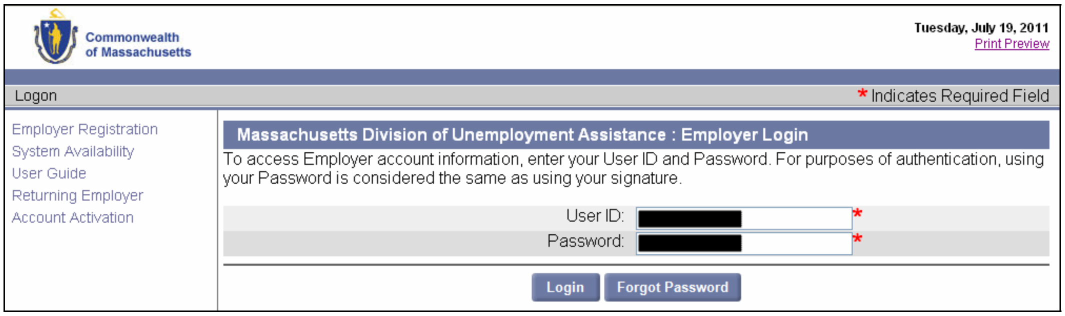
1. If you just activated your account and are still viewing the **Activation Complete** page, skip to **Step 3**.

   If you closed your browser before logging in, navigate to the DUA – QUEST webpage at www.mass.gov/uima.

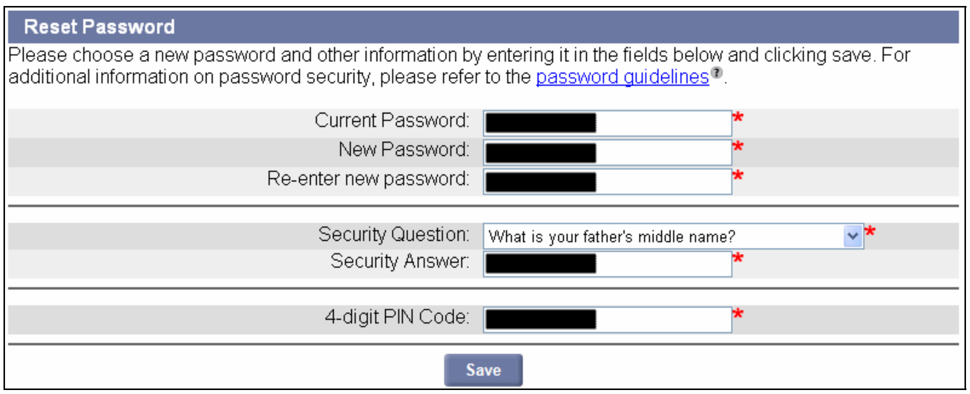
2. Scroll to the QUEST area of the page. Click **Employer Login**.



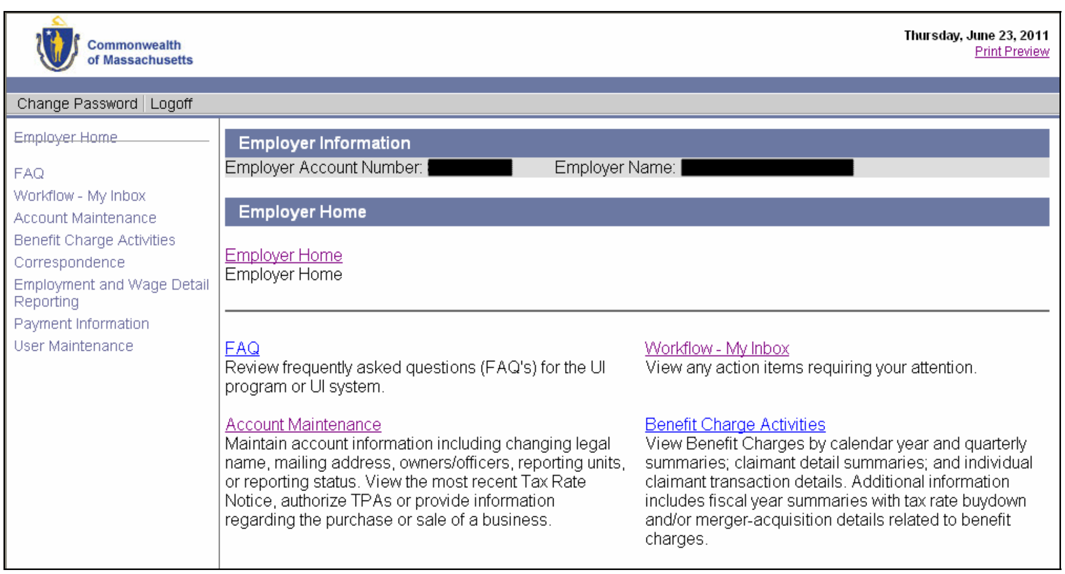
3. In the **Employer Login** page, enter the User ID and Password you received when you completed the activation. Click **Login**.



4. The **Reset Password** page appears. Enter the current password and new password, select a security question, answer the question, and enter a 4-digit PIN code. Click **Save** to continue.



5. When the **Employer Home** page appears you have successfully changed your password and logged into the QUEST system.



Account Maintenance

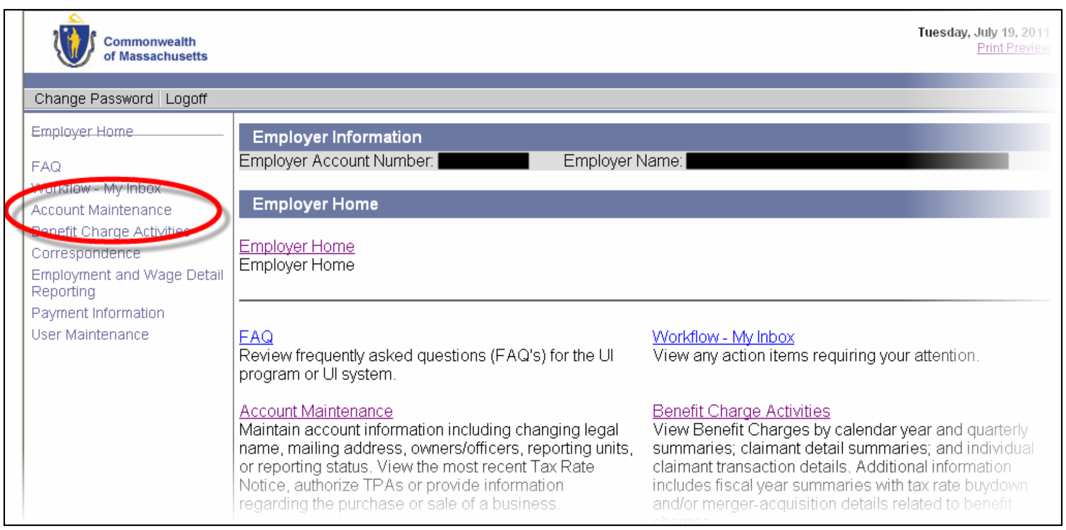
ABOUT ACCOUNT MAINTENANCE

Introduction	This section describes how to use the functions available from the Account Maintenance page. Functions include: • View Employer Account Profile • Address Information • Employer Appeals • Maintain Employer Name • Maintain Owners/Officers • Maintain Employer Reporting Units • Provide Information on the Purchase or Sale of a Business • Suspend Employer Account • Revive Employer Account (for Suspended Accounts) • View Rate Notice • Voluntary Contribution • Third Party Administrator (TPA) Authorization • Change Method of Payment (for Governmental and Non-Profit Organizations)

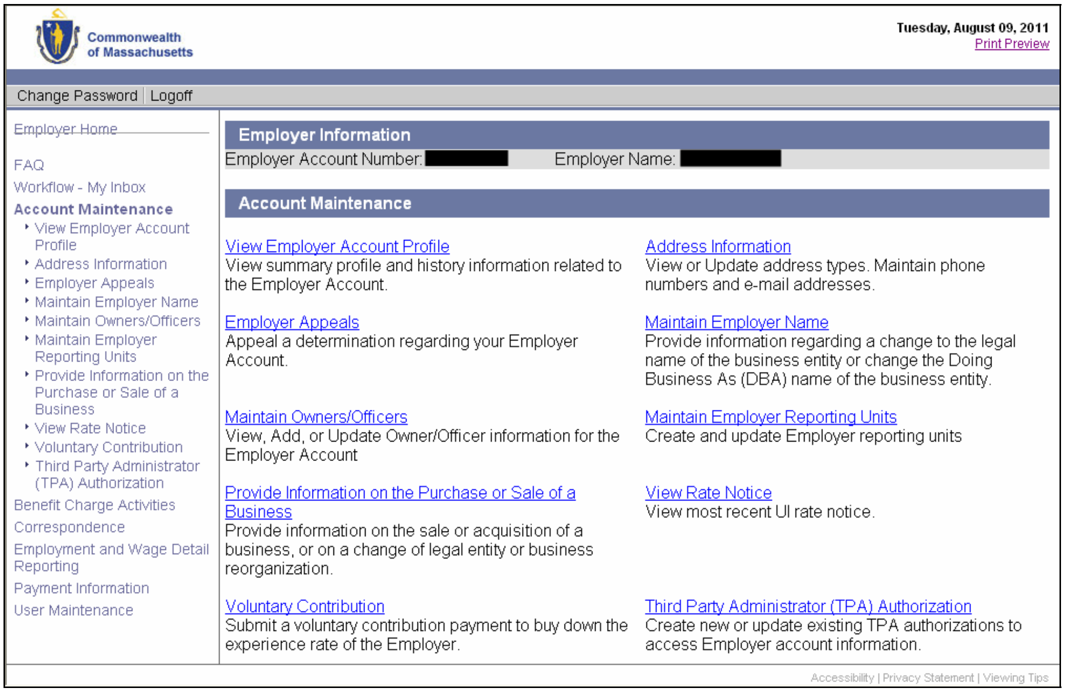
NAVIGATING TO ACCOUNT MAINTENANCE

To navigate to Account Maintenance, perform the following steps:

1. Log in to QUEST. Click the **Account Maintenance** link in the left pane (the link also appears on the main pane of the Employer Home page).



2. The **Account Maintenance** page appears. Available account maintenance functions are listed in links in the left pane as well as the main pane. The main pane also displays explanations of the functions. Click a link to access a function.



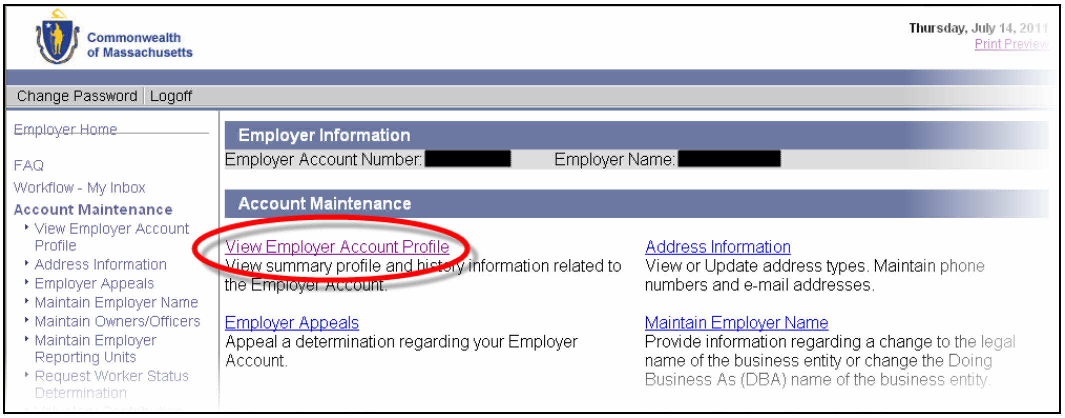
VIEW EMPLOYER ACCOUNT PROFILE

Introduction	The Account Profile area displays numerous details about your business, your DUA Employer account, and your status. Many of the details can be clicked to display greater detail and/or history. Information includes the following: Employer Account Identification Information • Employer Account Number (EAN) • Federal Employer Identification Number (FEIN) Employer Account Subjectivity Information • DBA • Converted Employer (Y/N) • Subjectivity Date • Registration Initiated By (system / employer) • Registration Date • Date of First Wages • Subjectivity Reason* Employer Account Status Information • Employer Status* • Revival Date* • Suspension Date • Suspension Reason* • Bankruptcy Date* • Bankruptcy Chapter Employer Account Rate Information • UI Contribution Rate* • UI Rated Year • UHI Contribution Rate* • UHI Rated Year Employer Account Business Information • Legal Entity Type* • Business Type* • Reporting Method* • NAICS* • Incorporation/Formation State • Incorporation/Formation Date • Ownership* • Has multiple reporting units? • Using Leasing Company? • 501(c)3* • Electronic File Waiver Employer Account Action Information • Status Determination Pending* • Pending Appeal Items with an asterisk (*) can be clicked to display additional details.

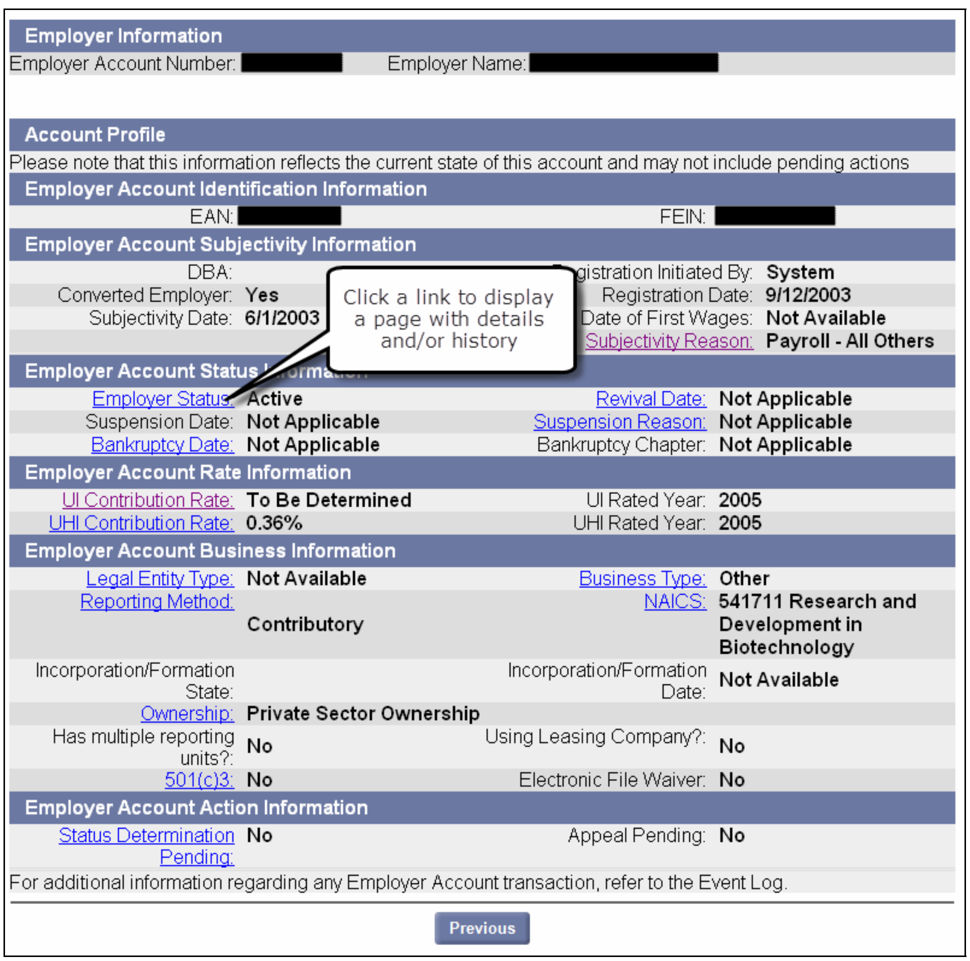
Navigating to Account Profile

Navigate to the **Account Profile** page by performing the following steps:

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **View Employer Account Profile** link.



3. The **Account Profile** page appears.



Viewing Account Profile Details

1. Perform the steps in Navigating to Account Profile.
2. Click a link on the page to view details and/or history. (See examples 1, 2, and 3.)

Example 1: UI Contribution Rate History displays if you click the **UI Contribution Rate** link.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

UI Contribution Rate History

Date and Time Changed	Effective Begin Date	Experience Rate	Adjusting User Name
3/12/2010 5:20:18 PM	1/1/2010	3.300%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2009	4.410%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2008	3.370%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2007	3.650%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2006	4.210%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2005	5.200%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2004	2.530%	CONVERSION
12/4/2009 2:51:53 PM	1/1/2003	2.125%	CONVERSION

Previous

Example 2: UHI Contribution Rate History displays if you click the **UHI Contribution Rate** link.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

UHI Contribution Rate History

Date and Time Changed	Effective Begin Date	Experience Rate	Adjusting User Name
2/4/2011 4:08:37 AM	1/1/2011	0.360%	batch
12/4/2009 5:24:24 PM	1/1/2010	0.240%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2009	0.120%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2008	0.120%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2007	0.120%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2006	0.080%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2005	0.040%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2004	0.000%	CONVERSION
12/4/2009 5:24:24 PM	1/1/2003	0.000%	CONVERSION

Previous

Example 3: Employer Status History displays if you click the **Employer Status** link.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employer Status History

Date and Time Changed	Employer Status	Adjusting User Name
9/12/2003 12:00:01 AM	Active	CONVERSION

Previous

ADDRESS INFORMATION

Introduction

This section describes how to:

- View and modify the **primary address information** on an Employer account.
- View Employer address **history**.
- View and modify **Correspondence Preferences** that designate whether you receive official correspondence from DUA via **US Mail**, or **Email**.

Additional Information

An Employer account can have up to six different types of addresses:

- Legal
- Physical Location
- Mailing
- Business Records Location
- Benefits Charge
- Wage and Separation

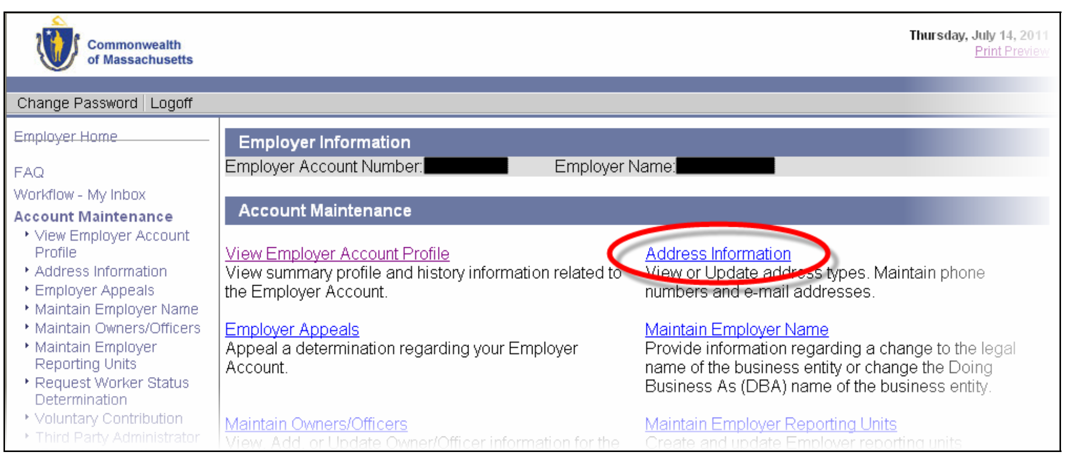
There can only be one address per address type.

NOTE: An Employer can have reporting units attached to the primary account. Two types of addresses are allowed on each reporting unit: Physical Location and Wage and Separation.

Address maintenance for reporting units is performed from **Maintain Reporting Units** page (and not the Address Information page). See the section *Maintain Reporting Units* under *Account Maintenance* for instructions.

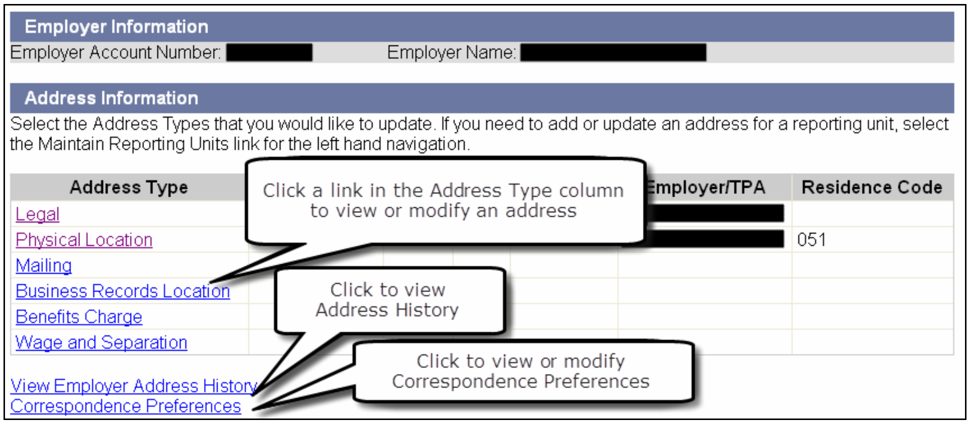
Navigating to the Address Information Page

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Address Information** link.



3. The **Address Information** page appears. The page has links that allow you to:

- View and modify each type of address
- View an address history with list events associated with address changes in the past.
- View or modify Correspondence Preferences

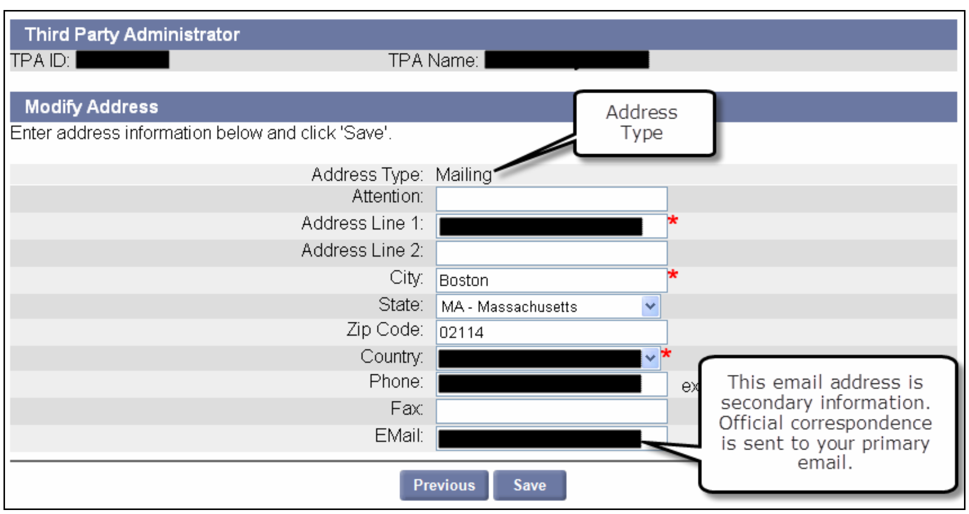


Viewing or Modifying an Address

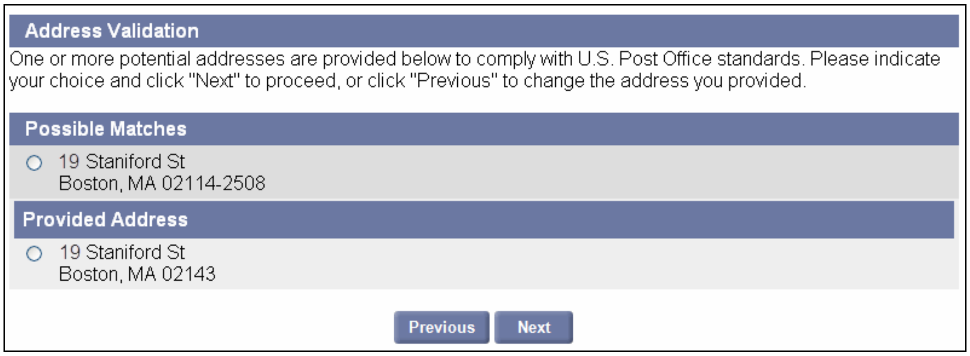
1. Display the **Address Information** page using the instructions in the previous section.

2. Click one of the links in the Address Type column to display address details for that address type (if any).

3. The **Modify Address** page appears. Make changes as necessary and click **Save**. (Return to the Address Information page without saving changes by clicking **Previous**.)

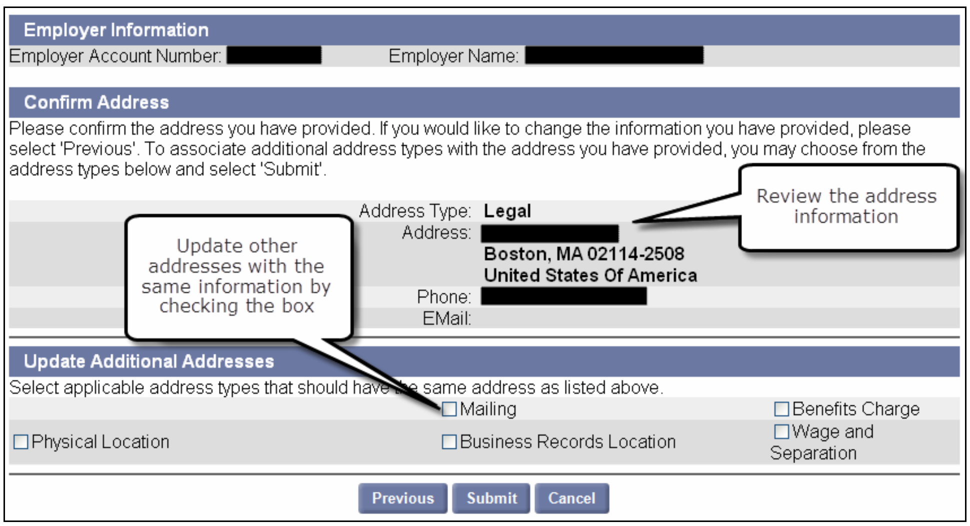


4. In the **Address Validation** page, select the address that is closest to your actual address. Click **Next**.



NOTE: Any time an address is saved, the **Address Validation** page appears. Select the closest match. If applicable, select the address with the 9-digit extended Zip code (known as "Zip +4").

5. Review the changes (if any) displayed in the **Confirm Address** area.



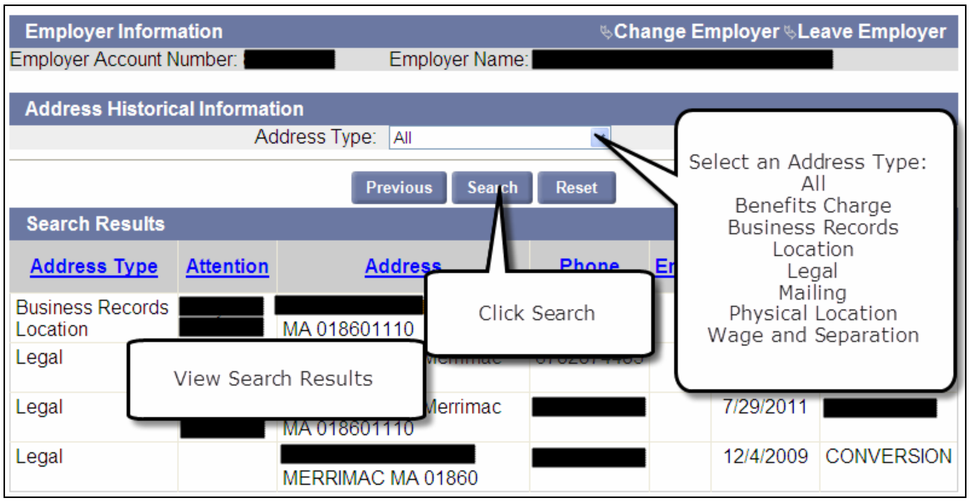
6. Optional: update other addresses with the same information by checking an additional address box.

7. Click **Submit** to save the changes. (Click **Previous** to return to the **Modify Address** page. Click **Cancel** to return to the **Address Information** page.)

NOTE: If you assign a TPA the **Wage and Separation Mailing** role and **Benefits Charges Protest Submission** role, the TPA will receive the hard copy bill/correspondence from DUA, and their address will be listed under Address Information. If you want to change the address for benefits charges protest and wage and separation, the TPA's assignment must be changed to **Benefits Charges View Only**. See the section on *TPA Authorization* for instructions on changing TPA roles.

Viewing Address History

1. Perform the steps in the section, *Navigating to the Address Information Page*.
2. Click **View Employer Address History**.
3. Select an **Address Type** and click **Search**. View the search results displayed below the search grid.



Viewing or Modifying Correspondence Preference

1. Display the **Address Information** page using the instructions in the previous section.
2. Click **Correspondence Preferences**.
3. The **Communication Method** page appears. Select **Email** or **US Mail**. Enter an email address.

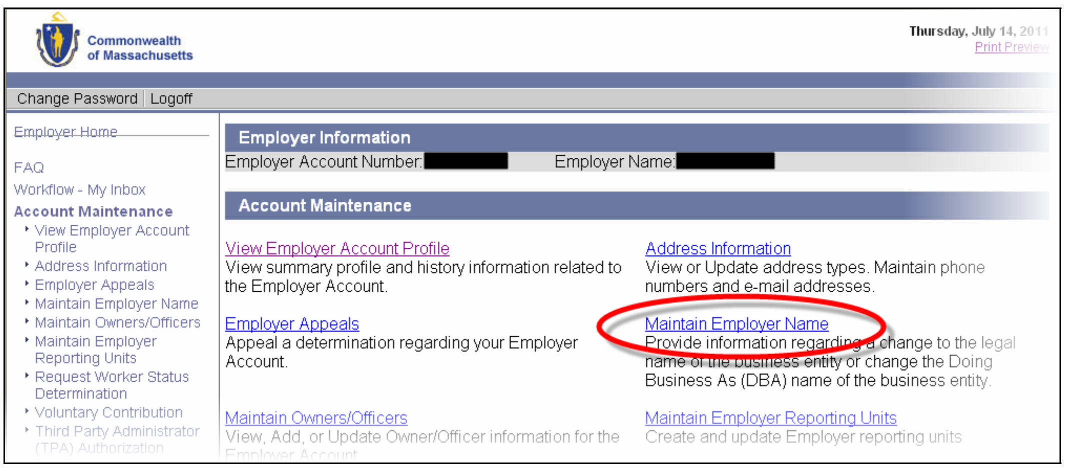
4. Click **Submit**.

MAINTAIN EMPLOYER NAME

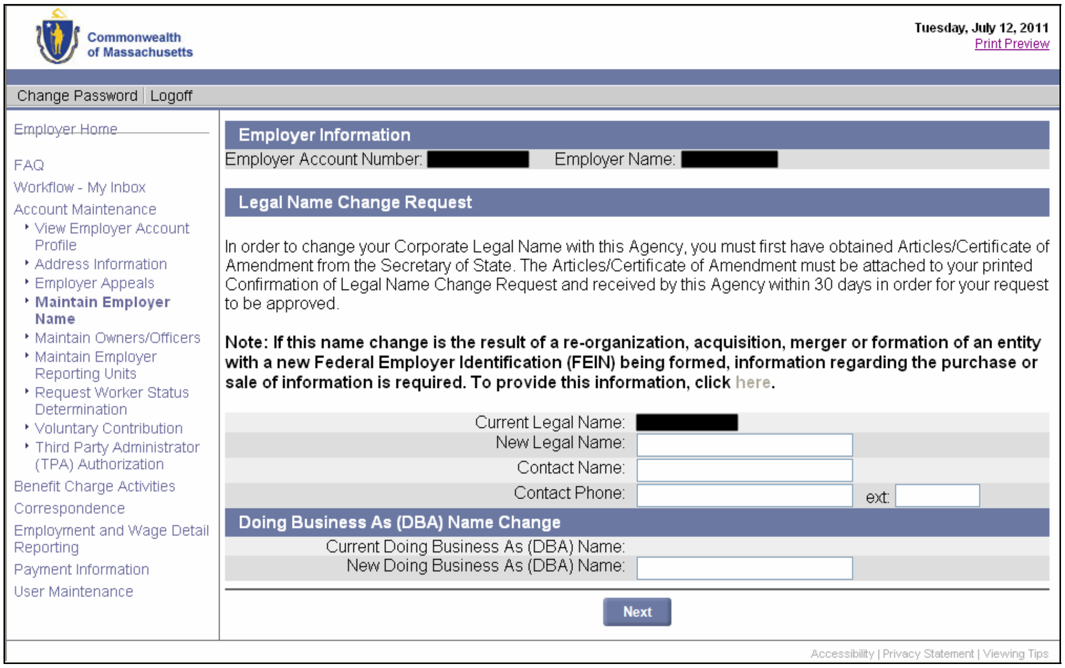
Introduction	This section describes how to modify an Employer's legal and/or DBA name. It also describes how to view the name change history associated with an Employer account. **NOTE**: In order to change the legal entity name with DUA, the Employer should have obtained Articles/Certificate of Amendment from the Secretary of State. The Articles/Certificate of Amendment must be attached to the printed confirmation of legal name change request and received by DUA within 30 days for the request to be approved. Upon receipt of documents, DUA staff will review them and deny or allow the request. If 30 days have passed since the initiation of the request without the receipt of documents, the name change request will be cancelled automatically.

Navigating to the Employer Name Page

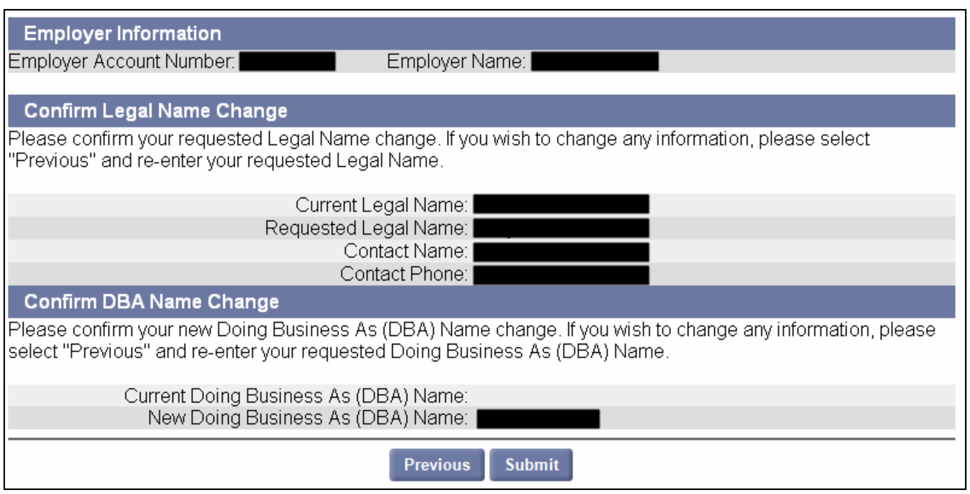
1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Maintain Employer Name** link.



3. The **Name Change Request** page appears. Enter the new legal name and/or **Doing Business As** name and click **Next**.



4. On the **Confirm Name Change** page, the current and new (requested) legal and DBA Names are displayed. Click **Submit** to confirm. (Click **Previous** to return to the Change Request page.)



5. A printable bar-coded page appears. Do the following:

- Print the page.
- Attach the page to a copy of your Articles/Certificate of Amendment from the Secretary of State.
- Mail it to the DUA by the date specified:

  Department of Unemployment Assistance
  ATTN: Employer Liability Department
  19 Staniford St.
  Boston, MA 02114

  FAX: 617-727-8221

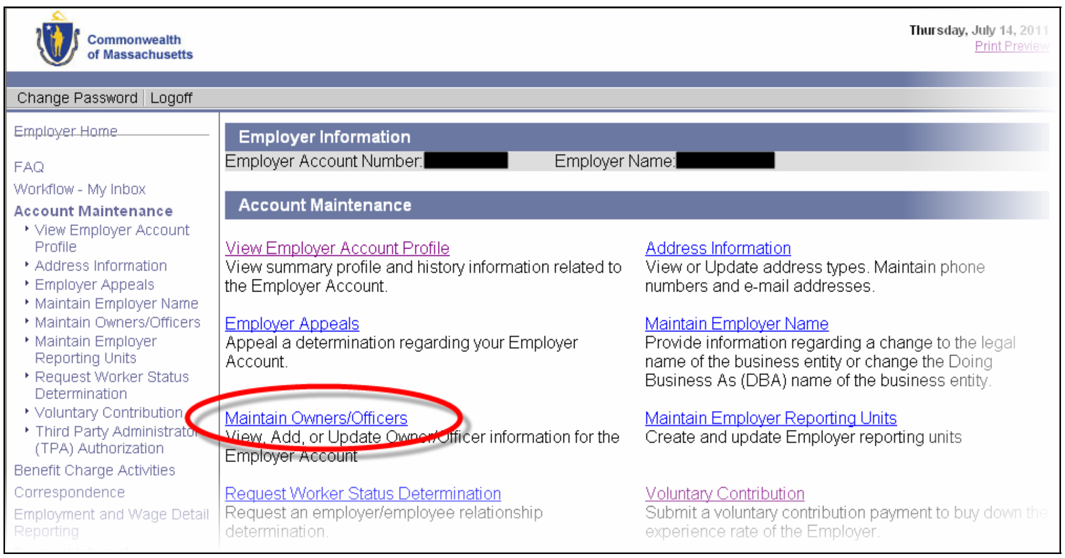
IMPORTANT NOTE: Mail the bar-coded page with your Articles/Certificate of Amendment to DUA by the date specified on the page.

MAINTAIN OWNERS/OFFICERS

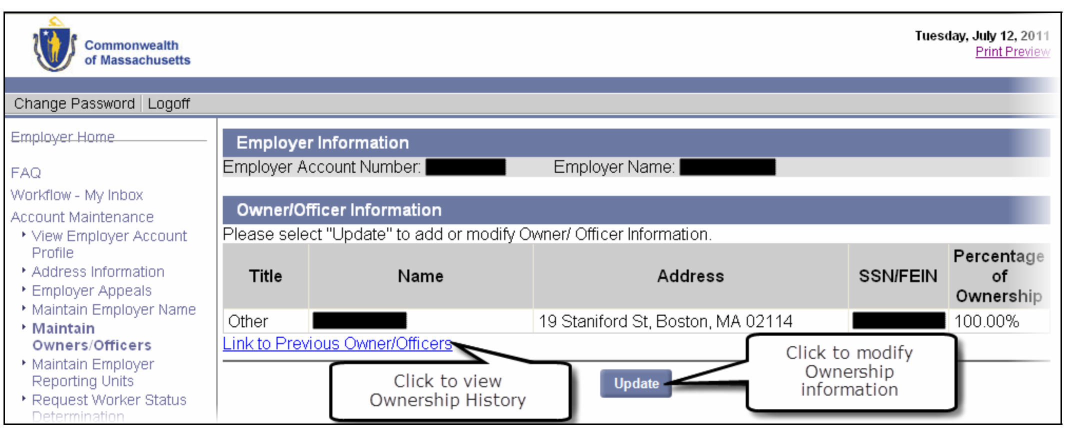
Introduction	This section describes how to view, add, and modify owner/officer information, and view ownership history.
Helpful Hints	• The combined ownership percentage of all owners on the account cannot exceed 100%. • It is not possible to add a second owner/officer when the business type is sole proprietorship. • The owner can be an individual owner or a legally formed entity. • Information on up to five owners can be added to an account.

Viewing Owner/Officer Information

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Maintain Owner/Officers** link.



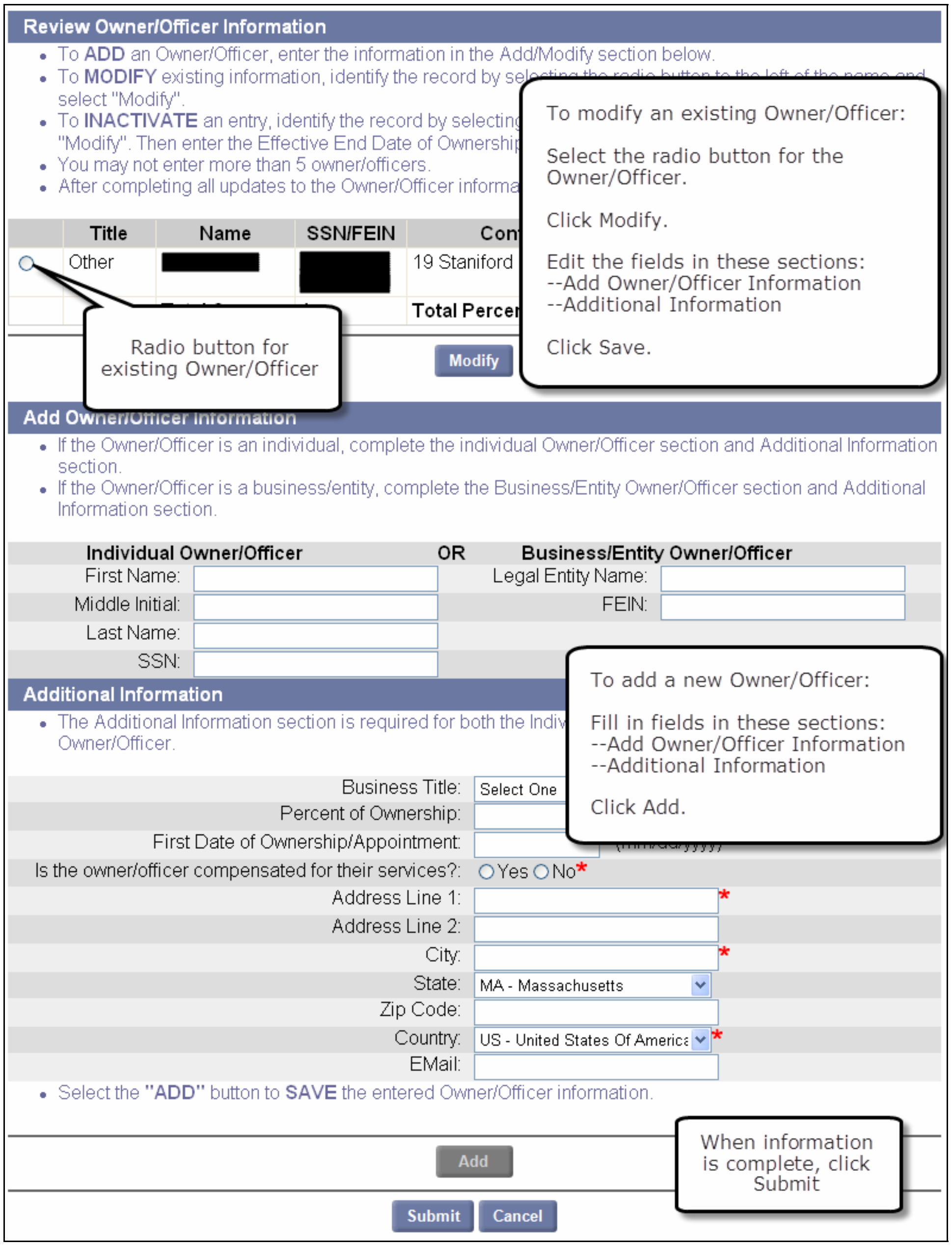
3. The **Owner/Officer Information** page appears.



Updating Owner/Officer Information

1. Display the **Owner/Officer Information** page using the instructions in the previous section.
2. Click **Update**.
3. The **Review Owner/Officer** page appears. Add, modify, or inactivate Owner/Officer entries using the instructions below.

NOTE: Owner/Officer information that is being updated due to the purchase or sale of a business must be changed by following the steps in the section, *Provide Information on the Purchase or Sale of a Business*.



To Add an Owner/Officer:

1. Perform the steps in *Updating Owner/Officer Information*.
2. Enter the information into the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas.
3. Click **Add** below the **Additional Information** area.
4. Repeat for each new Owner/Officer entry you want to add.

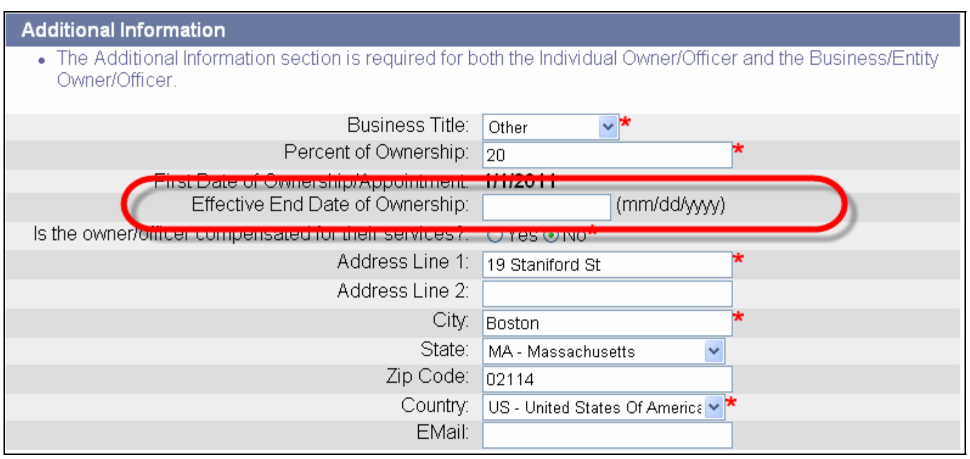
IMPORTANT NOTE: Information about an Owner/Officer in the **Add/Modify Owner/Officer Information** area should either go under **Individual Owner/Officer** (left column) or **Business Entity Owner/Officer** (right column). Do not put information in both columns.

To Modify Existing Owner/Officer Information:

1. Perform the steps in *Updating Owner/Officer Information*.
2. Select the radio button to the left of an entry.
3. Click **Modify**.
4. Edit the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas.
5. Click **Save** below the **Additional Information** area.
6. Repeat for each existing Owner/Officer entry.

To Inactivate an Owner/Officer:

1. Perform the steps in *Updating Owner/Officer Information*.
2. Select the radio button to the left of that entry and click **Modify**.
3. Add a date to the Effective End Date of Ownership field.



4. Click **Save**.

Viewing Owner/Officer History

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Maintain Owner/Officers** link.
3. Click **Link to Previous Owner/Officers**.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

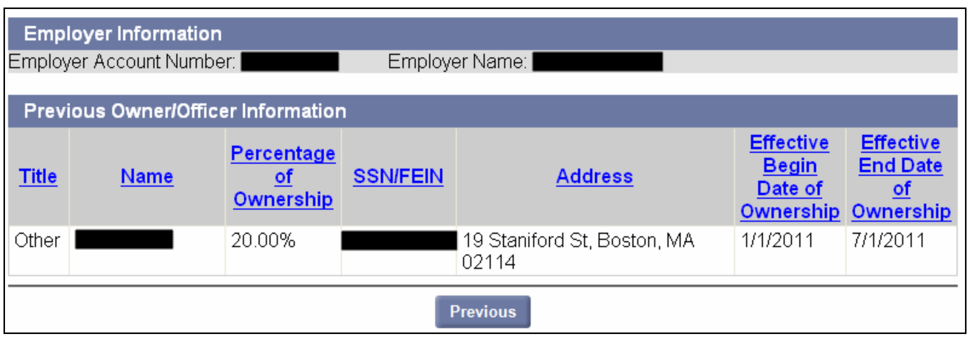
Owner/Officer Information

Please select "Update" to add or modify Owner/ Officer Information.

Title	Name	Address	SSN/FEIN	Percentage of Ownership
Other	[redacted]	19 Staniford St, Boston, MA 02114	[redacted]	100.00%

Link to Previous Owner/Officers

4. The **Previous Owner/Officer Information** page appears. It is similar to the Owner/Officer Information page, but displays **Effective Begin Date** of Ownership and **Effective End Date** of Ownership.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Previous Owner/Officer Information

Title	Name	Percentage of Ownership	SSN/FEIN	Address	Effective Begin Date of Ownership	Effective End Date of Ownership
Other	[redacted]	20.00%	[redacted]	19 Staniford St, Boston, MA 02114	1/1/2011	7/1/2011

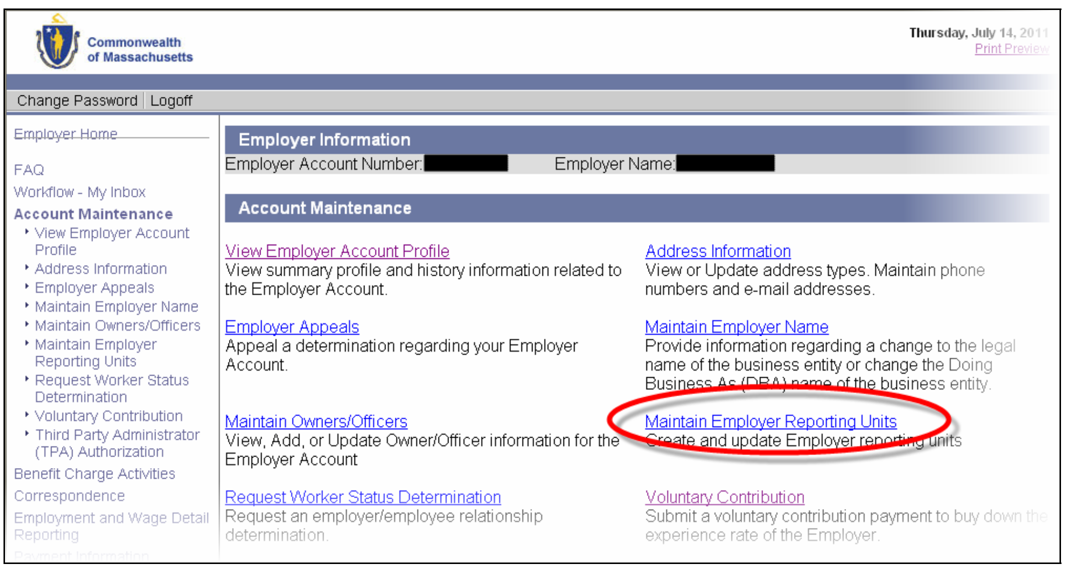
Previous

MAINTAIN EMPLOYER REPORTING UNITS

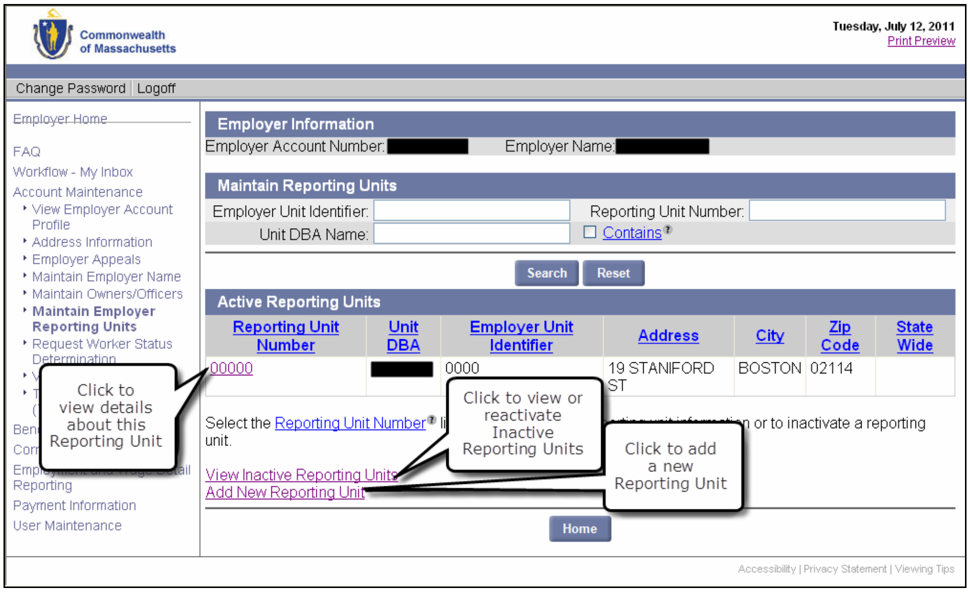
Introduction	This section of the document describes how to view, add, or modify an Employer reporting unit. Additional reporting units can be added to an Employer account when the business has multiple reporting units for administrative reasons. Each reporting unit can have its own NAICS code, **Doing Business As** (DBA) name, and physical location and wage and separation address. The section also explains how to inactivate or reactivate a reporting unit, view reporting unit history, and designate the reporting unit address as the Wage and Separation address.
Helpful Hints	1. The physical location for a reporting unit can never be modified. If the physical location of a reporting unit has to be changed, then the existing unit has to be inactivated and a new reporting unit has to be created. 2. All registered Employers within the system are defaulted to the **00000** reporting unit.

Viewing a List of Employer Reporting Units

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Maintain Employer Reporting Units** link.



3. The **Maintain Reporting Units** page appears, displaying a list of Reporting Units associated with the Employer account. From this page you can view Reporting Unit details, inactivate a Reporting Unit, reactivate a Reporting Unit, or add a new Reporting Unit.

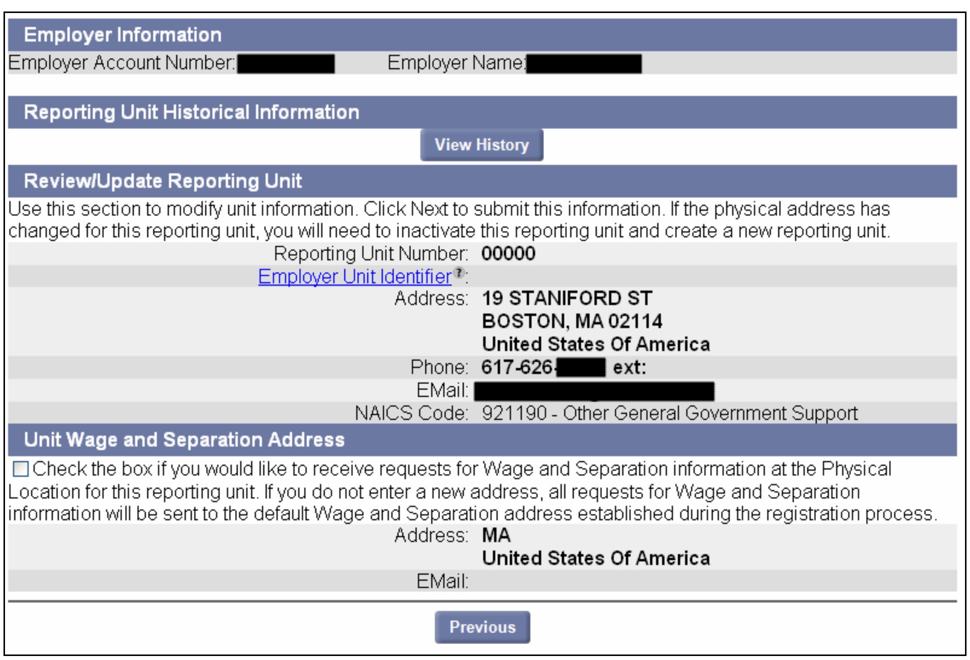


Viewing Reporting Unit Details

1. Follow the steps in *Viewing a List of Employer Reporting Units*.

2. Click a **Reporting Unit** number. An information page appears. (Two examples of the page are provided below.)

   Example 1: Page showing details for a **Primary** Reporting Unit. Primary Reporting Units cannot be edited, inactivated, or reactivated.



Example 2: Page showing details for an **additional** Reporting Unit. Additional Reporting Units can be edited, inactivated, or reactivated.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Reporting Unit Historical Information

View History

Click to view Reporting Unit History

Review/Update Reporting Unit

Use this section to modify unit information. Click Next to submit this information. If the physical address has changed for this reporting unit, you will need to inactivate this reporting unit and create a new reporting unit.

Modify Reporting Unit Information

Reporting Unit Number:	**00001**
Reporting Unit Doing Business As (DBA) Name:	[redacted]
Employer Unit Identifier:	2
Attention:	
Address Line 1:	**19 Staniford St**
Address Line 2:	
City:	**Boston**
State:	**Massachusetts**
Zip:	**02114**
Country:	**United States Of America**
Phone:	ext:
International Phone:	
Fax:	
International Fax:	
EMail:	
NAICS Code:	921190 - Other General Government Support Change NAICS Code

Inactivate Reporting Unit

Use this section to inactivate this unit.

Inactivate the Reporting Unit

Inactivate Reporting Unit?:	☐
Date of Last Wages for this Reporting Unit:	(mm/dd/yyyy)
Is this unit being inactivated due to a sale of the unit?	○ Yes ○ No
Is this unit being inactivated due to a move?	○ Yes ○ No
Other ?:	

Unit Wage and Separation Address

☐ Check the box if you would like to receive requests for Wage and Separation information at the Physical Location for this reporting unit. If you do not enter a new address, all requests for Wage and Separation information will be sent to the default Wage and Separation address established during the registration process.

Specify an address for Wage and Separation Information

Attention:	
Address Line 1:	
Address Line 2:	
City:	
State:	MA - Massachusetts
Zip Code:	
Country:	US - United States Of Americ
Phone:	ext:
International Phone:	
Fax:	
International Fax:	
EMail:	

Previous Next

Viewing Reporting Unit History

1. Follow the steps in *Viewing Reporting Unit Details*.
2. Click **View History**. The **Reporting Unit Historical Information** page displays.

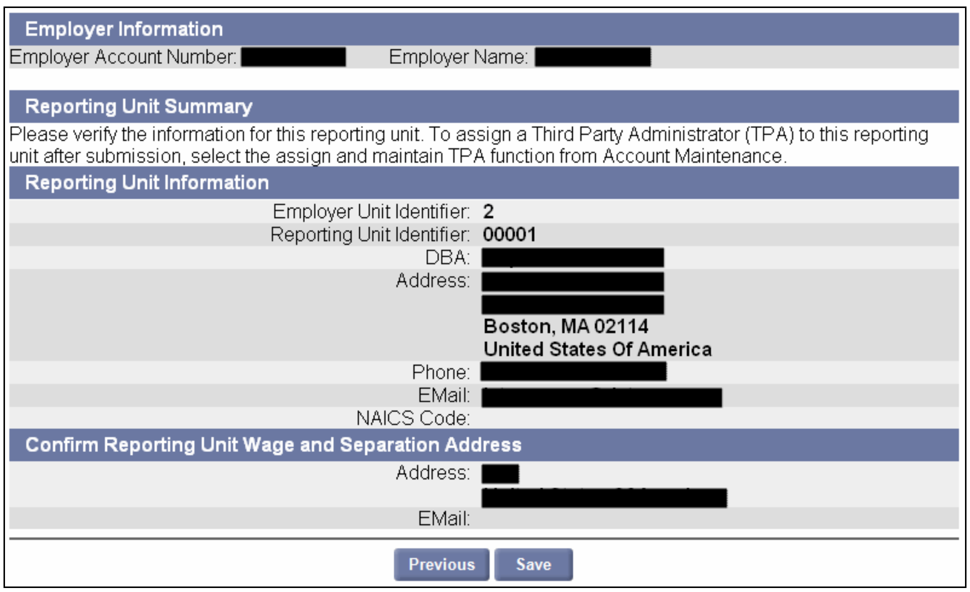
   NOTE: The historical information is a log of events associated with the changes made on the reporting unit's **NAICS Code**, **Wage and Separation** address and account **status**.

3. Click **Previous** to return to the details page.
4. Click **Previous** to return to the list of Employer Reporting Units.

Modifying Employer Reporting Unit Information

NOTE: Primary Reporting Units cannot be edited, inactivated, or reactivated. These instructions apply only to additional Reporting Units.

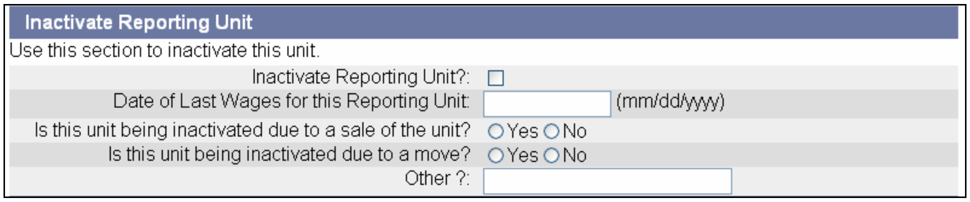
1. Follow the steps in *Viewing Reporting Unit Details*.
2. Edit the DBA Name, Employer Unit Identifier, Attention line, Phone, Fax, Email address, or NAICS code.
3. Click **Next** to submit your changes.
4. The **Reporting Unit Summary** page appears. Click **Save**.



Inactivating an Employer Reporting Unit

1. Follow the steps in *Viewing Reporting Unit Details*.

2. On the **Reporting Unit** page, in the **Inactivate Reporting Unit** area, put a check in the **Inactivate Reporting Unit?** box, and answer the questions.



Inactivate Reporting Unit

Use this section to inactivate this unit.

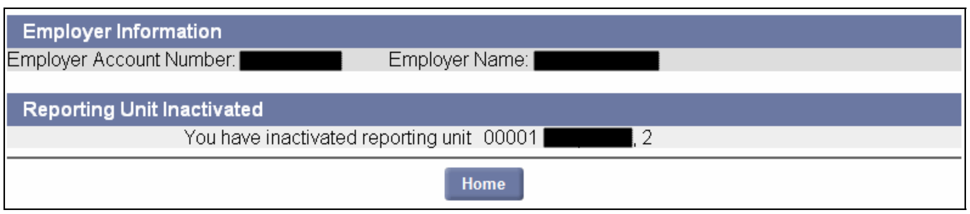
Inactivate Reporting Unit?:	☐
Date of Last Wages for this Reporting Unit:	(mm/dd/yyyy)
Is this unit being inactivated due to a sale of the unit?	○ Yes ○ No
Is this unit being inactivated due to a move?	○ Yes ○ No
Other ?:	

3. Click **Next** to submit your changes.

   NOTE: If the inactivation is due to sale of the unit, you will be prompted for information on the transfer of the business. See the section, *Provide Information on the Purchase or Sale of a Business* for additional instructions.

4. The **Reporting Unit Summary** page appears. Click **Save**.

5. The **Reporting Unit Inactivated** page displays. Click **Home**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Reporting Unit Inactivated

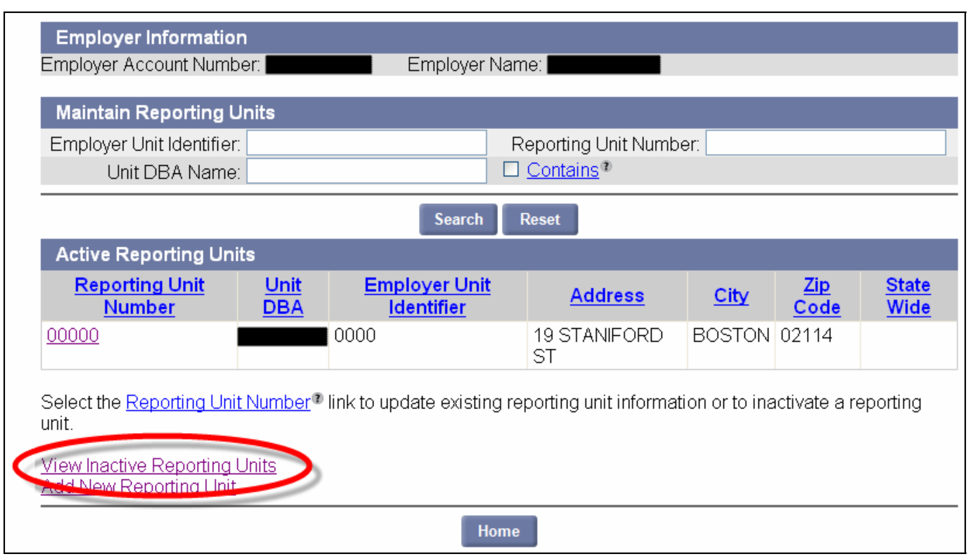
You have inactivated reporting unit 00001 [redacted], 2

Home

Reactivating an Employer Reporting Unit

1. Click **Account Maintenance**. Click the **Maintain Employer Reporting Units** link.

2. Click **View Inactive Reporting Units**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Maintain Reporting Units

Employer Unit Identifier: Reporting Unit Number:

Unit DBA Name: ☐ Contains

Search Reset

Active Reporting Units

Reporting Unit Number	Unit DBA	Employer Unit Identifier	Address	City	Zip Code	State Wide
00000	[redacted]	0000	19 STANIFORD ST	BOSTON	02114	

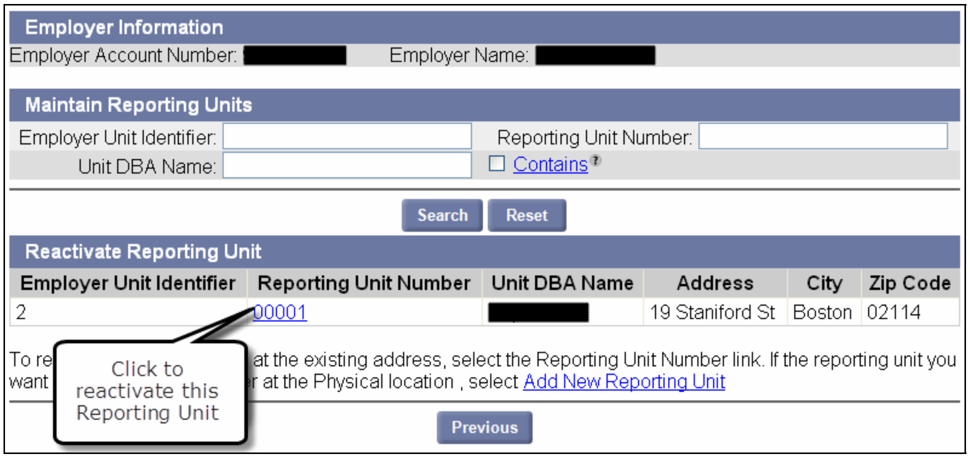
Select the Reporting Unit Number link to update existing reporting unit information or to inactivate a reporting unit.

View Inactive Reporting Units

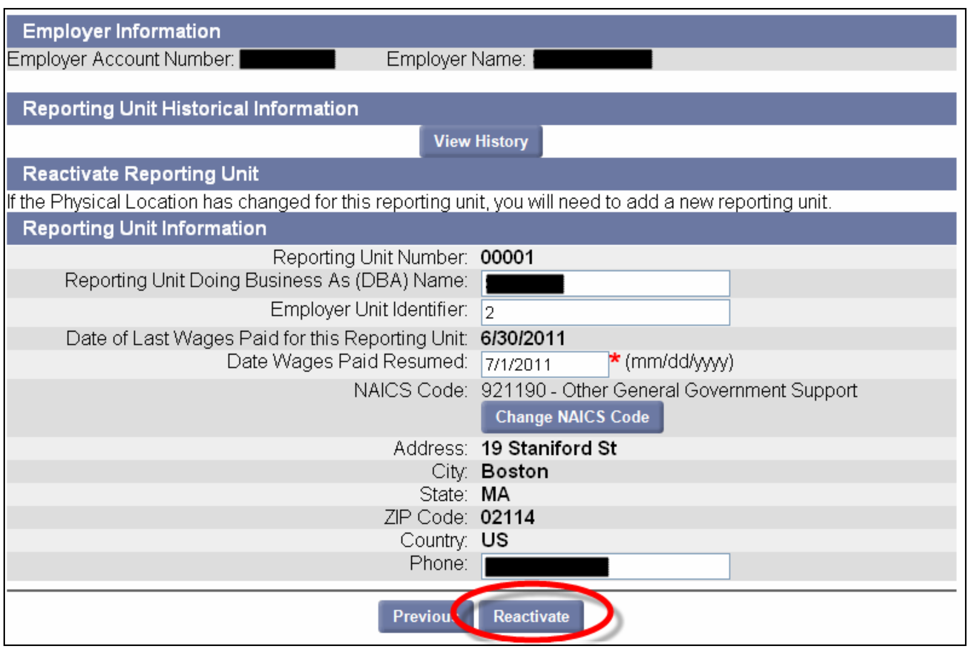
Add New Reporting Unit

Home

3. A page displays Reporting Units that you can reactivate. Click on the Reporting Unit **Number** to be reactivated.



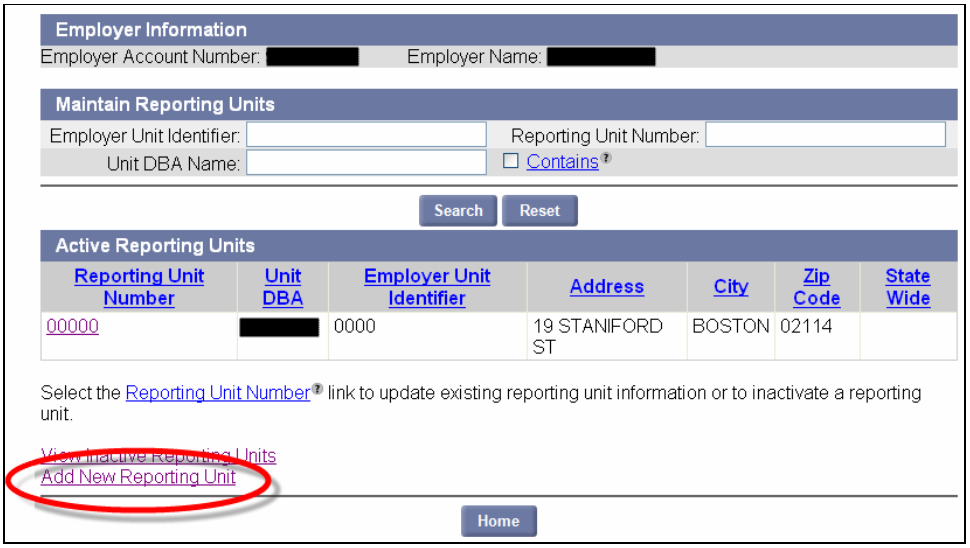
4. In the **Reactivate** page, enter DBA, Employer Unit Identifier, the Date you resumed paying wages, and the current phone number, and click **Reactivate**.



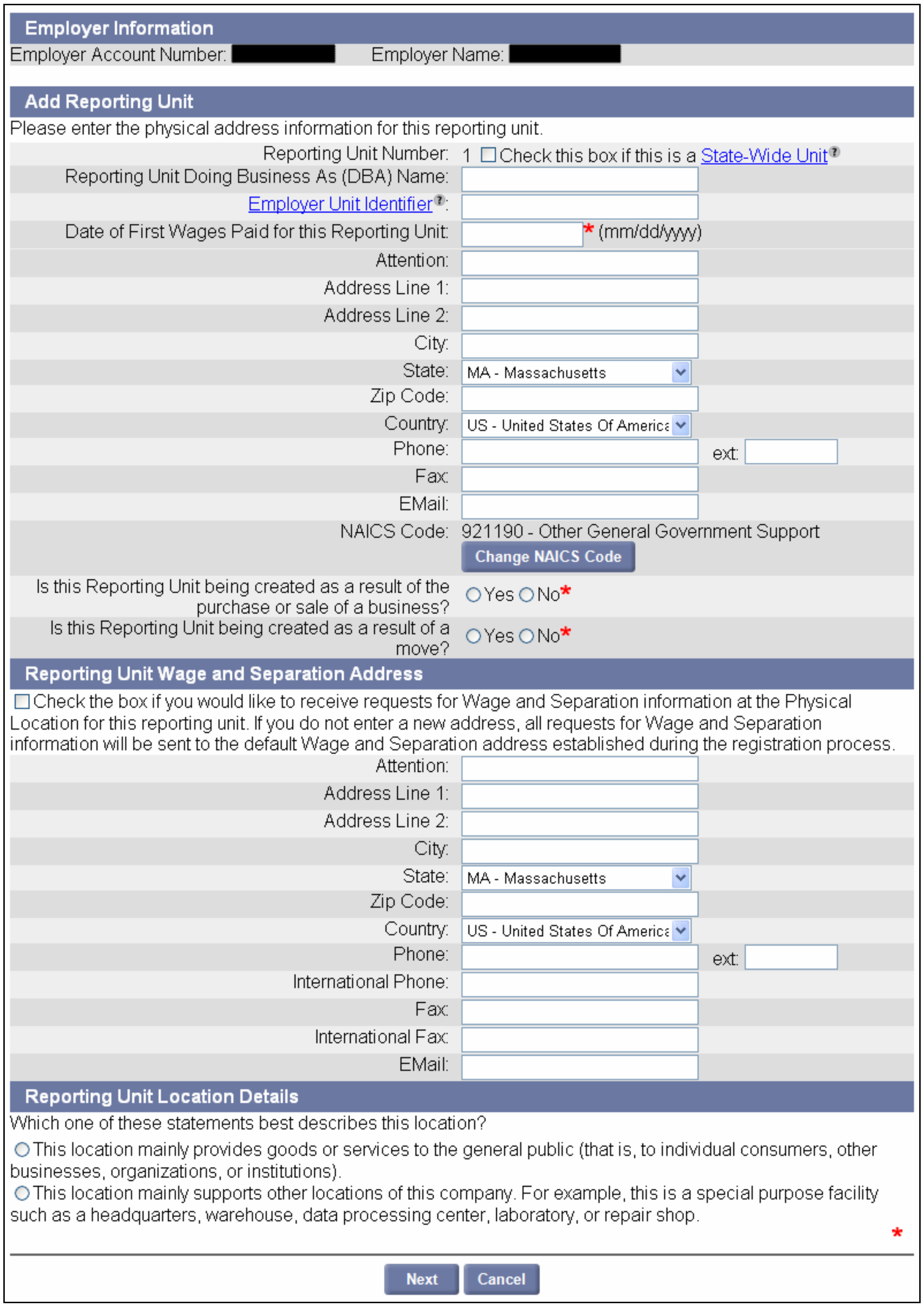
5. A confirmation page appears. Click **Home**.

Adding a New Reporting Unit

1. Click **Account Maintenance.** Click the **Maintain Employer Reporting Units** link.
2. Click **Add New Reporting Unit**.



3. In the **Add Reporting Unit** page, enter DBA, Employer Unit Identifier, the Date you started paying wages, physical address, NAICS Code, wage and separation address, and Reporting Unit location details. Click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Add Reporting Unit

Please enter the physical address information for this reporting unit.

Reporting Unit Number:	1 ☐ Check this box if this is a State-Wide Unit
Reporting Unit Doing Business As (DBA) Name:	
Employer Unit Identifier:	
Date of First Wages Paid for this Reporting Unit:	* (mm/dd/yyyy)
Attention:	
Address Line 1:	
Address Line 2:	
City:	
State:	MA - Massachusetts
Zip Code:	
Country:	US - United States Of Americ
Phone:	ext:
Fax:	
EMail:	
NAICS Code:	921190 - Other General Government Support Change NAICS Code
Is this Reporting Unit being created as a result of the purchase or sale of a business?	○ Yes ○ No*
Is this Reporting Unit being created as a result of a move?	○ Yes ○ No*

Reporting Unit Wage and Separation Address

☐ Check the box if you would like to receive requests for Wage and Separation information at the Physical Location for this reporting unit. If you do not enter a new address, all requests for Wage and Separation information will be sent to the default Wage and Separation address established during the registration process.

Attention:	
Address Line 1:	
Address Line 2:	
City:	
State:	MA - Massachusetts
Zip Code:	
Country:	US - United States Of Americ
Phone:	ext:
International Phone:	
Fax:	
International Fax:	
EMail:	

Reporting Unit Location Details

Which one of these statements best describes this location?

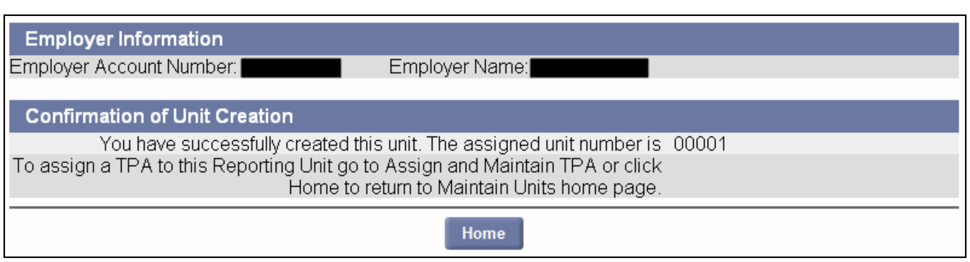
○ This location mainly provides goods or services to the general public (that is, to individual consumers, other businesses, organizations, or institutions).

○ This location mainly supports other locations of this company. For example, this is a special purpose facility such as a headquarters, warehouse, data processing center, laboratory, or repair shop.

*

Next Cancel

4. A **Reporting Unit Summary** page appears. Click **Submit**.
5. A **Confirmation** page appears. Click **Home**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Confirmation of Unit Creation

You have successfully created this unit. The assigned unit number is 00001

To assign a TPA to this Reporting Unit go to Assign and Maintain TPA or click Home to return to Maintain Units home page.

Home

CHANGE METHOD OF PAYMENT

Introduction	This section describes how an authorized user can submit a request to change the method of payment on an Employer account. An eligible Employer can elect to change the payment method from reimbursable to contributory or from contributory to reimbursable. In order to be eligible the Employer must be a private non-profit Employer or a Governmental entity. If a private non-profit Employer is requesting that the status be changed to reimbursable, the Employer's 501(c)(3) Federal Exemption Letter must be received and/or be on file for the change to take effect. Governmental employees do not need to provide the 501(c)(3) letter to change their status to reimbursable. If your request is to change from reimbursable to contributory status, no documentation is required.

Helpful Hints	• A payment method can be elected only when (1) the annual election window for requesting change of payment method is open for the Employer or (2) Employer is registering for the first time and indicates 501(c)(3) status or is a governmental Employer.
	• The annual election window is from:
	  • September 1 to December 1 for private non-profit Employers;
	  • September 1 to December 31 for governmental Employers.
	• When a change in the method of payment is requested by eligible Employers during the annual re-election window, the new payment method will take effect on January 1 of the next year.
	• If an Employer indicates 501(c)(3) status during registration, then they will be initially assigned contributory status. If the 501(c)(3) exemption letter is received within a period of 30 days from registration, the status will be changed to reimbursable, effective from their subjectivity date.

Changing the Method of Payment

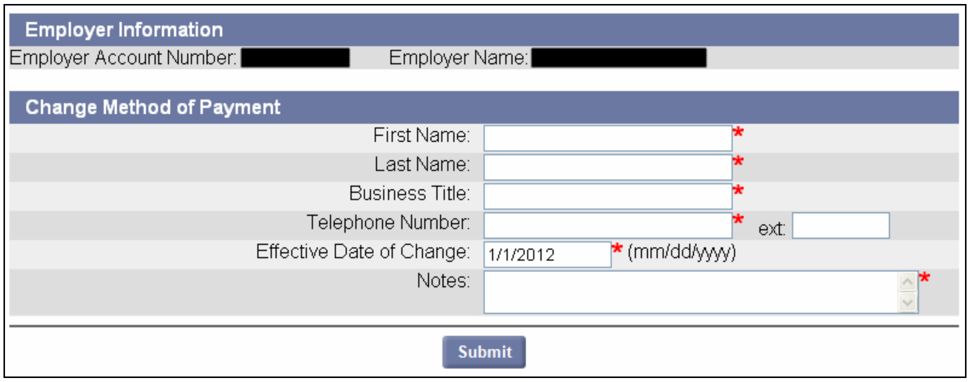
1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Change Method of Payment** link.

   NOTE: The link for **Change Method of Payment** only appears during the *annual election window*. This is the window during which Employers are allowed to change their method of payment:

   Private non-profit Employers: September 1 through December 1.

   Governmental Employers: September 1 through December 31.

3. The **Change Method of Payment** page appears. Enter the requested information. Click **Submit**.



Employer Information

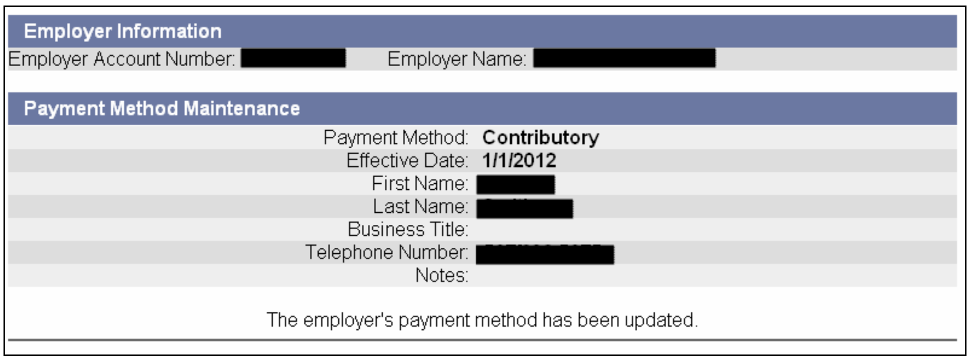
Employer Account Number: [redacted] Employer Name: [redacted]

Change Method of Payment

First Name: *
Last Name: *
Business Title: *
Telephone Number: * ext:
Effective Date of Change: 1/1/2012 * (mm/dd/yyyy)
Notes: *

Submit

4. The **Payment Method Maintenance** page appears, confirming the update to the payment method.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Payment Method Maintenance

Payment Method: **Contributory**
Effective Date: **1/1/2012**
First Name: [redacted]
Last Name: [redacted]
Business Title:
Telephone Number: [redacted]
Notes:

The employer's payment method has been updated.

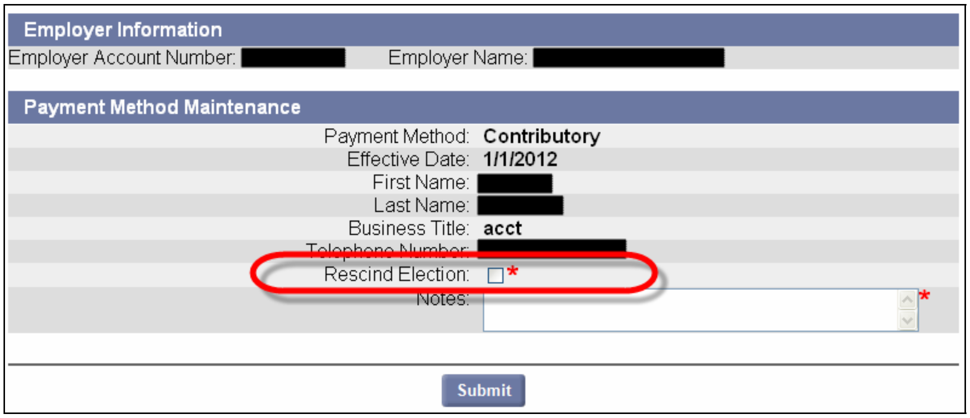
NOTE: If Employer payment method is currently contributory, the system will change the payment method to reimbursable on the effective date, provided the federal exemption letter 501(c)(3) letter is received by DUA within a period of 30 days. If the Employer payment method is currently reimbursable, the system will change the payment method to contributory on the effective date.

Rescinding the Method of Payment

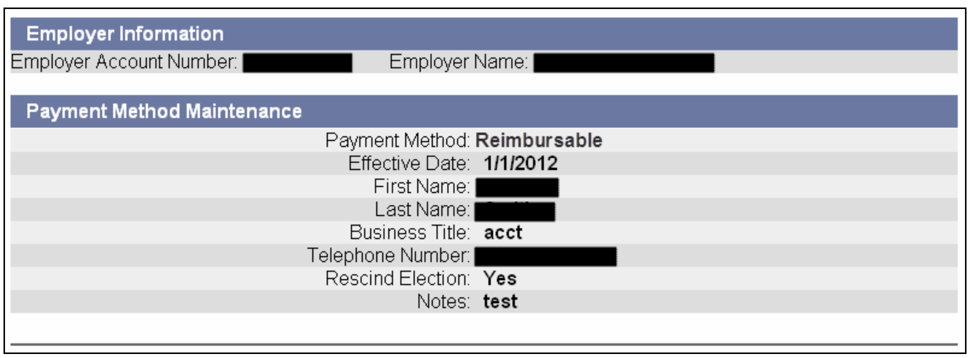
If you wish to rescind your election, you can do so before the annual election window closes.

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Change Method of Payment** link.

3. The **Payment Method Maintenance** page appears. Put a check in the **Rescind Election** box, add Notes, and click **Submit**.



4. The **Payment Method Maintenance** page redisplays with the old payment method.



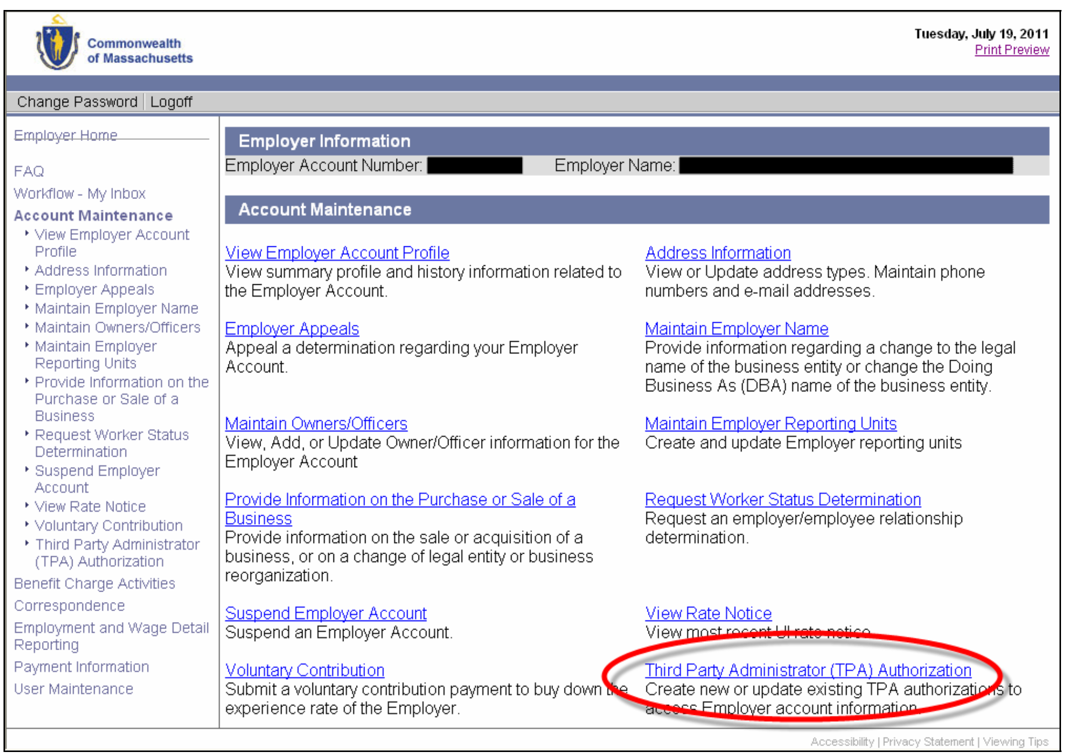
TPA AUTHORIZATION

Introduction	This section describes how to authorize Third Party Administrators (TPAs) to conduct business with the DUA on an Employer's behalf. The functions that TPAs can be authorized to perform are designated with specific role assignments. TPAs can be assigned one or multiple roles. Multiple TPAs can be authorized as well; however, no role can be assigned to more than one TPA. To quickly perform a basic TPA authorization, perform the steps in these sections: • **Viewing the Third Party Administrator (TPA) Authorization Page**. • **Authorizing a TPA**. This includes instructions on setting TPA Services begin and end dates and assigning roles to the TPA. Also see these sections for more detailed information: • Displaying a List of Your Authorized TPAs • Viewing TPA Authorization Details • Modifying a TPA's Service Dates • Adding or Removing TPA Role Assignments • Assigning TPA Roles by Reporting Unit • Ending a TPA's Authorization **IMPORTANT NOTE**: You will need to enter a TPA ID for each TPA you authorize. If necessary, contact your TPA(s) for their current TPA ID(s) before you begin.

Viewing the TPA Authorization Page

1. Log in to QUEST and click **Account Maintenance**.

2. Click the **Third Party Administrator (TPA) Authorization** link.

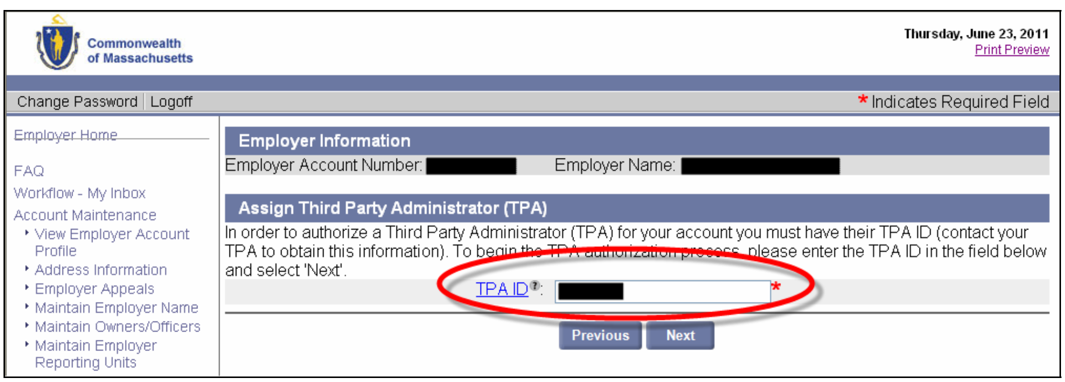


3. The **Third Party Administrator (TPA) Authorization** page appears.

Authorizing a TPA

1. Perform the steps in *Viewing the TPA Authorization Page*.
2. Click **New**.

3. Enter the TPA ID and click **Next**.



4. The **Third Party Administrator Information** page appears.

- Enter the **TPA Services Begin Date**.
- Enter a **TPA Services End Date** or leave blank.
- Check each role that applies to this TPA.
- Click **Save** to complete the authorization.

IMPORTANT NOTES:

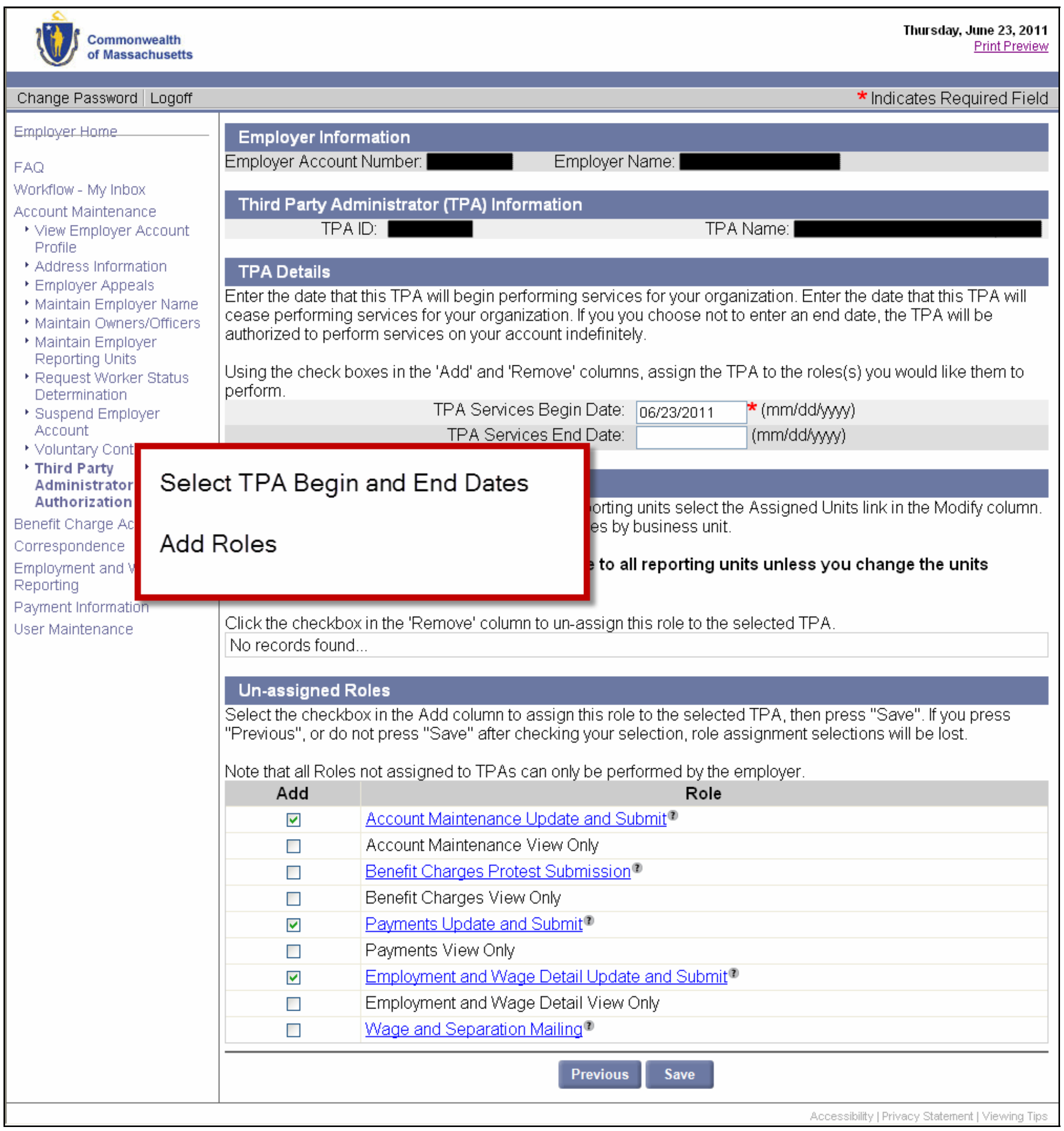
You cannot enter a **TPA Services Begin Date** that is prior to the current date, although once a TPA is authorized, they can perform TPA functions on data retroactively.

A role assignment can only be actively applied to one TPA at a time.

Most roles have two versions: active, and passive (view only). Only one of the two can be assigned to the same TPA.

Any role(s) not assigned to a TPA must be performed by the Employer.

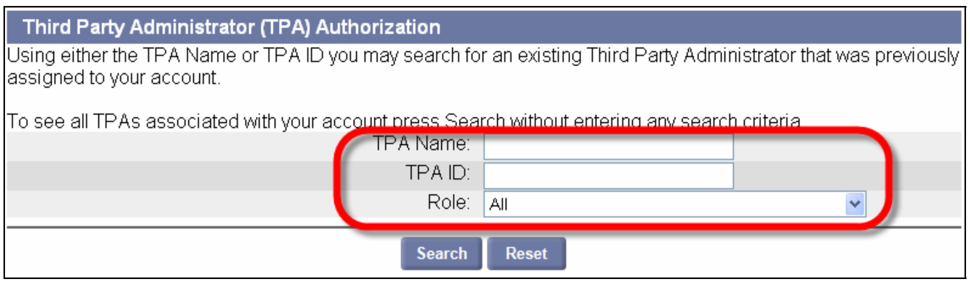
If you assign the roles for **Wage and Separation Mailing** and **Benefits Charges Protests Submission** to a TPA, then that TPA (and not the Employer) will receive the hard copy bill/correspondence from DUA.



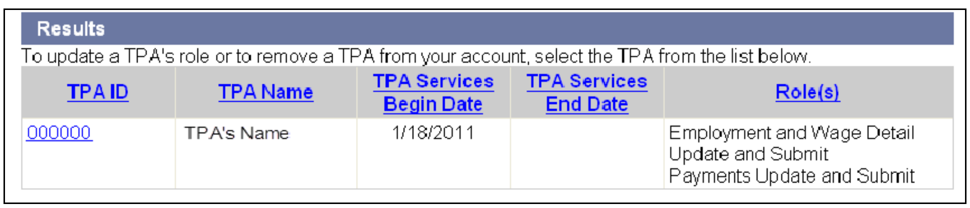
Displaying a List of Your Authorized TPAs

1. Perform the steps in *Viewing the TPA Authorization Page*.
2. Configure search criteria:
   - To see all TPA(s) associated with your Employer account, leave the search criteria blank.
   - To limit your search to a specific TPA, enter the TPA name or ID in the search fields.

   Click **Search**.



3. The search results appear in the same page, below the search grid.

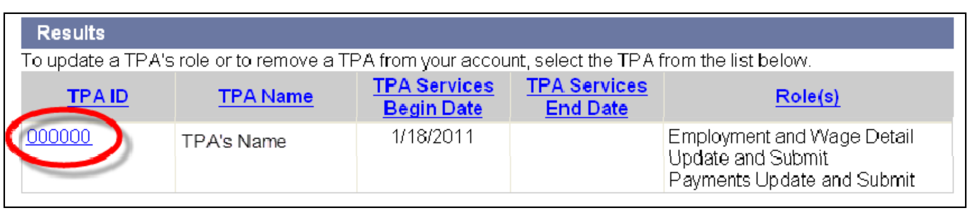

Results

To update a TPA's role or to remove a TPA from your account, select the TPA from the list below.

TPA ID	TPA Name	TPA Services Begin Date	TPA Services End Date	Role(s)
000000	TPA's Name	1/18/2011		Employment and Wage Detail Update and Submit Payments Update and Submit

Viewing TPA Authorization Details

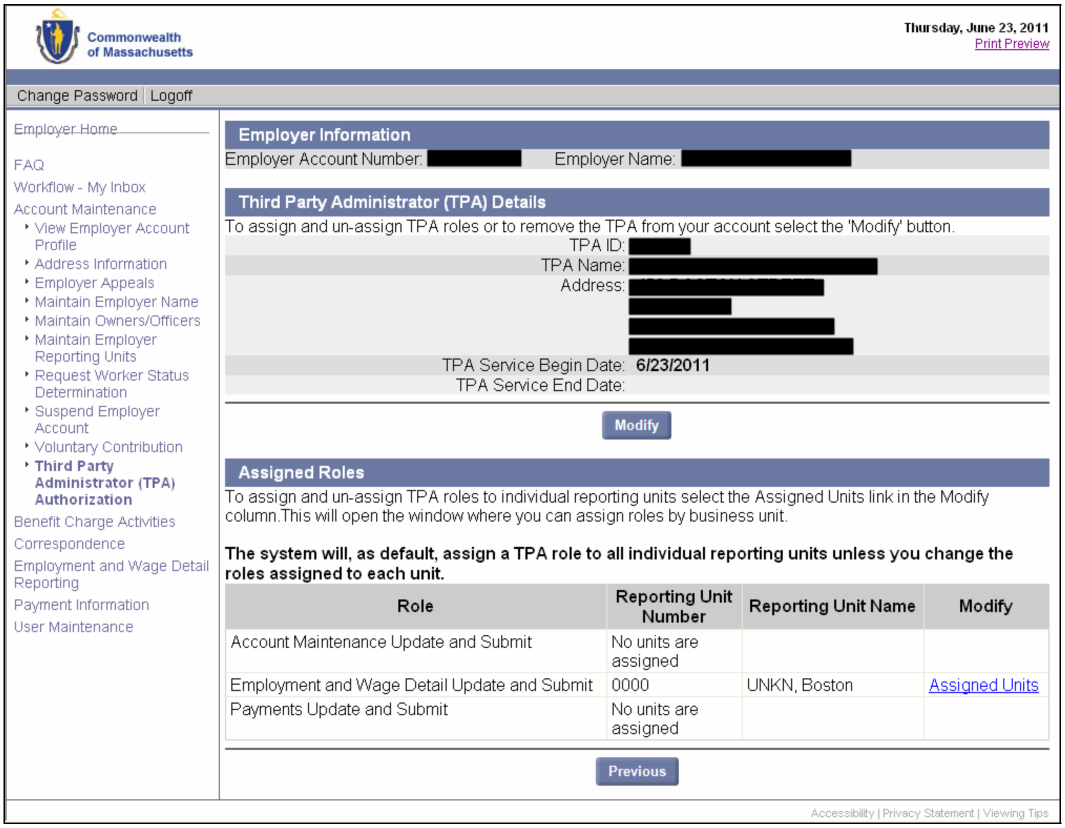
1. Perform the steps in *Displaying a List of Your Authorized TPAs*.
2. Click on a **TPA ID** to display authorization details.


Results

To update a TPA's role or to remove a TPA from your account, select the TPA from the list below.

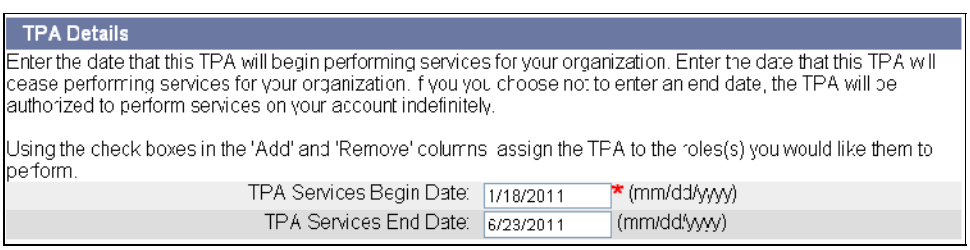
TPA ID	TPA Name	TPA Services Begin Date	TPA Services End Date	Role(s)
000000	TPA's Name	1/18/2011		Employment and Wage Detail Update and Submit Payments Update and Submit

3. The **Third Party Administrator (TPA) Details** page appears.



Modifying a TPA's Service Dates

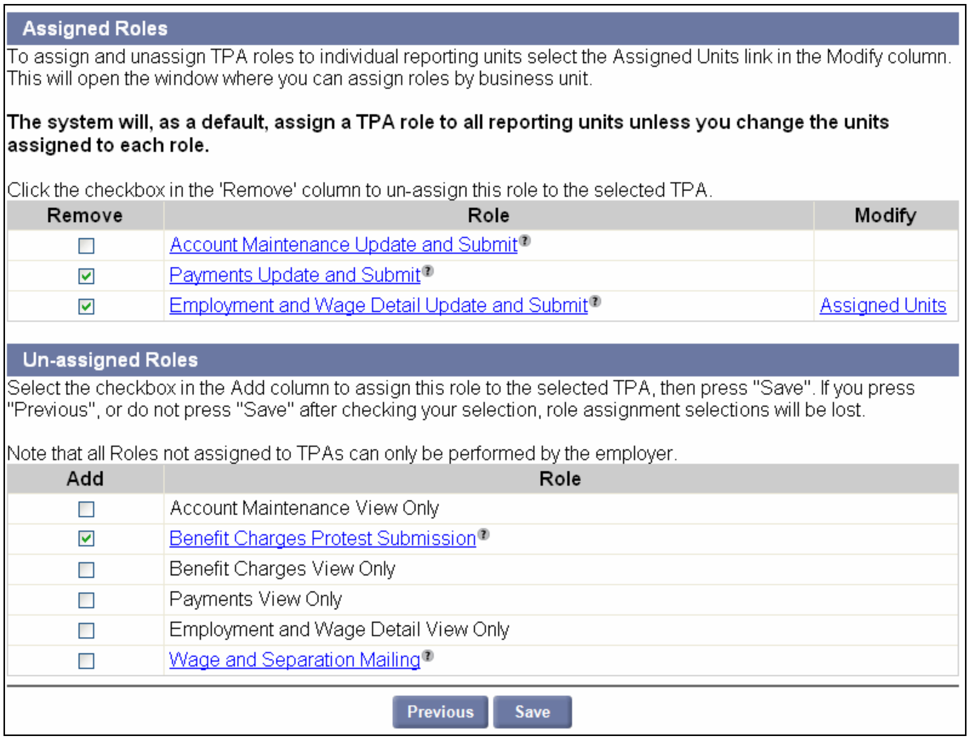
1. Perform the steps in *Viewing TPA Authorization Details*.
2. Click **Modify**.
3. In the **TPA Details** area, change the **TPA Service Start Date** and/or **TPA Service End Date**.



4. Click **Save**.

Adding or Removing TPA Role Assignments

1. Perform the steps in *Viewing TPA Authorization Details*.
2. Click **Modify**. Scroll to the area showing **Assigned Roles** and **Unassigned Roles**.



Assigned Roles

To assign and unassign TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business unit.

The system will, as a default, assign a TPA role to all reporting units unless you change the units assigned to each role.

Click the checkbox in the 'Remove' column to un-assign this role to the selected TPA.

Remove	Role	Modify
[ ]	Account Maintenance Update and Submit	
[x]	Payments Update and Submit	
[x]	Employment and Wage Detail Update and Submit	Assigned Units

Un-assigned Roles

Select the checkbox in the Add column to assign this role to the selected TPA, then press "Save". If you press "Previous", or do not press "Save" after checking your selection, role assignment selections will be lost.

Note that all Roles not assigned to TPAs can only be performed by the employer.

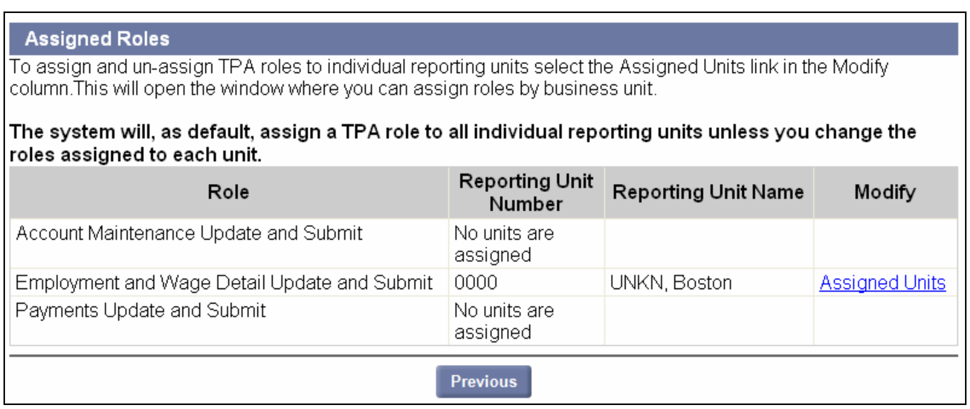
Add	Role
[ ]	Account Maintenance View Only
[x]	Benefit Charges Protest Submission
[ ]	Benefit Charges View Only
[ ]	Payments View Only
[ ]	Employment and Wage Detail View Only
[ ]	Wage and Separation Mailing

Previous Save

3. Check roles in the **Add** or **Remove** columns to designate new assignments.
4. Click **Save**.

Assigning TPA Roles by Reporting Unit

1. Perform the steps in *Viewing TPA Authorization Details*.
2. Click **Assigned Units** in the row for the Role you want to reassign by reporting unit.



Assigned Roles

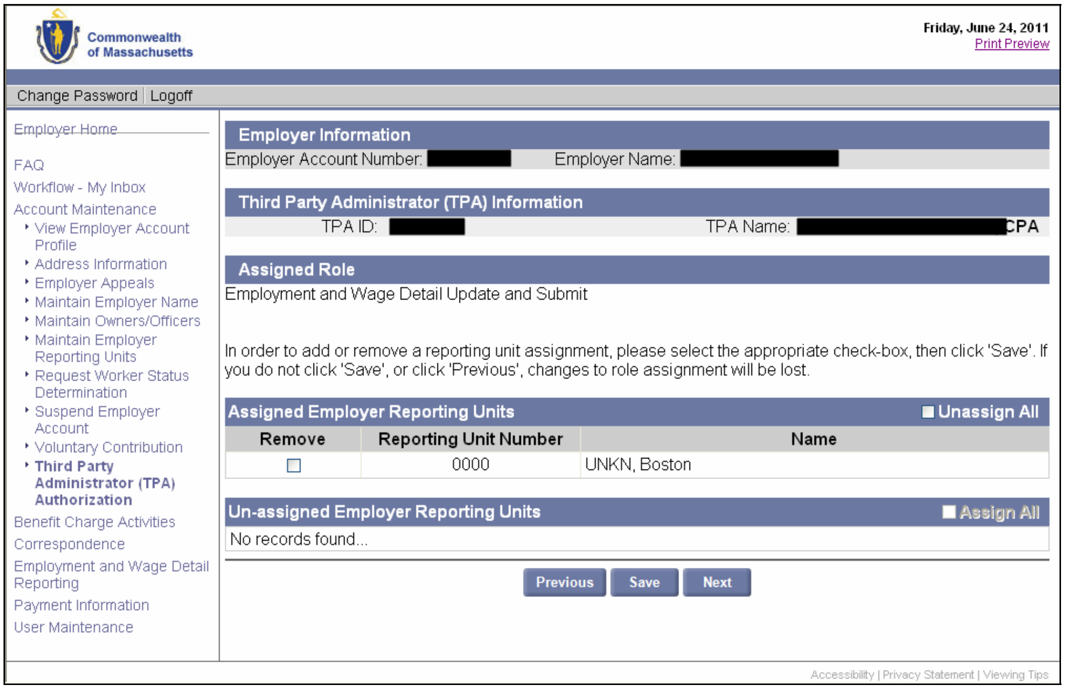
To assign and un-assign TPA roles to individual reporting units select the Assigned Units link in the Modify column.This will open the window where you can assign roles by business unit.

The system will, as default, assign a TPA role to all individual reporting units unless you change the roles assigned to each unit.

Role	Reporting Unit Number	Reporting Unit Name	Modify
Account Maintenance Update and Submit	No units are assigned		
Employment and Wage Detail Update and Submit	0000	UNKN, Boston	Assigned Units
Payments Update and Submit	No units are assigned		

Previous

3. The **Assigned Role / Assigned Employer Reporting Units** page appears. Check Reporting Units in the **Add** or **Remove** columns to designate new assignments. Click **Save**.



Ending a TPA's Authorization

To end a TPA's authorization to conduct business on your behalf, enter a date in the **TPA Services End Date** field.

- If you enter the **current date**, the authorization ends **at the <u>beginning</u> of the next day**.
- If you enter a **future date**, the authorization ends **at the <u>beginning</u> of the day after the date you entered**.

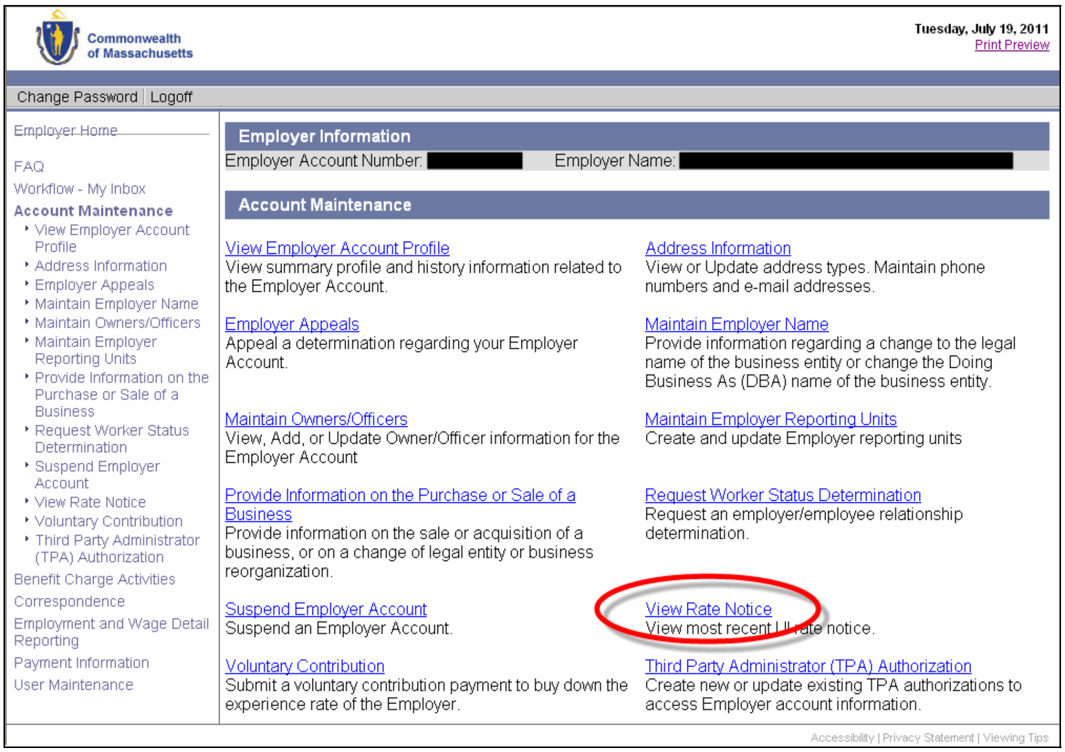
See *Modifying a TPA's Service Dates* for instructions.

VIEW RATE NOTICE

Introduction	This section explains how an authorized user can view the current tax rate notice for an Employer account.

1. Log in to QUEST and click **Account Maintenance**.

2. Click the **View Rate Notice** link.



3. The **Employer's Unemployment Insurance Contribution Rate Statement of Account Balance** page appears. Click a link on the page to view greater detail.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employer's Unemployment Insurance Contribution Rate Statement of Account Balance

The following factors were used when calculating your 2011 Unemployment Insurance (UI) Experience Rate

Your Beginning Account Balance as of 10/01/2009:	**$1,092.01**
Plus Contributions Paid through 10/31/2010:	**$3,089.55**
Minus the Benefit Charges to your account:	**$0.00**
Minus Refunds of UI Taxes:	**$0.00**
Minus the Solvency Assessment on your account:	**$1,228.96**
Account Balance Adjustments (+ or -):	**$0.00**
Any transfer of Excess Reserves (+ or -):	**$0.00**
Equals your Ending Account Balance:	**$2,952.60**
Wages Subject to Contributions as of 09/30/2010:	**$71,869.26**
Reserve Percentage (Ending Account Balance/Wages Subject to contributions):	**4.10 %**
This Reserve Percentage has been applied to 2011	
Experience Rate Schedule E resulting in a 2011 UI Contribution Rate of:	**4.880 %**
The 2011 Workforce Training Fund rate is:	**0.060 %**
Your 2011 UHI Contribution Rate is:	**0.360 %**

Home

VOLUNTARY CONTRIBUTION

Introduction

The Voluntary Contribution option allows experience rated Employers to pay additional UI contributions in order to reduce their UI contribution rate for the forthcoming calendar year.

The Voluntary Contribution process will be available for 30 days after the issuance of your contribution rate notice each year. The link to make a Voluntary Contribution will appear only if you are eligible and it is before the Voluntary Contribution cut off date.

To qualify for the Voluntary Contribution program, you:

- Must be eligible for experience rating;
- Must have submitted all Employment and Wage Detail Reports;
- Must have paid all Unemployment Insurance contributions, interest, and penalties to date.

NOTE: Employers can make Voluntary Contributions, using a paper check or ACH Debit payment. TPAs **cannot** make Voluntary Contribution payments for clients.

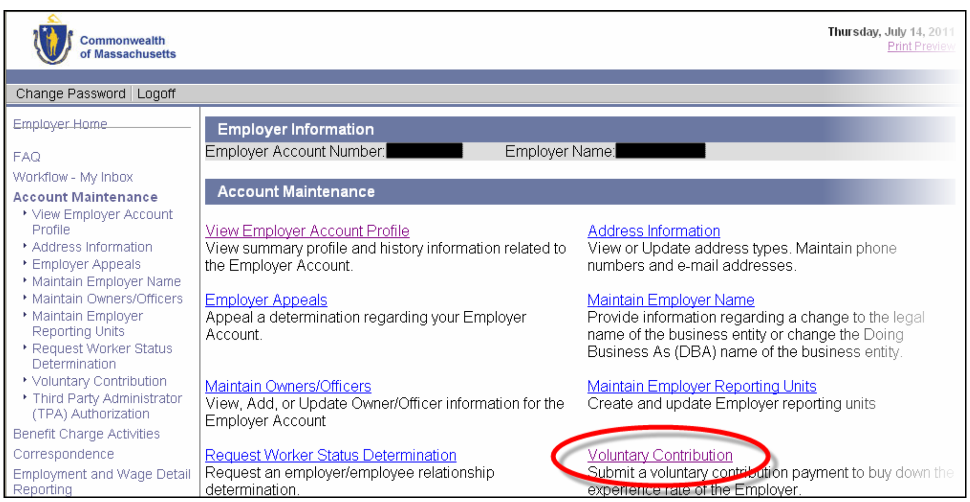
NOTE: You cannot use the Voluntary Contribution option if you have outstanding debt with DUA.

NOTE: Each year during the Voluntary Contribution period, DUA publishes guidelines that can help you decide whether to use the Voluntary Contribution program, and which contribution level to select (for example, in some cases, the contribution that reduces your rate exceeds the overall savings you would get from a lower rate).

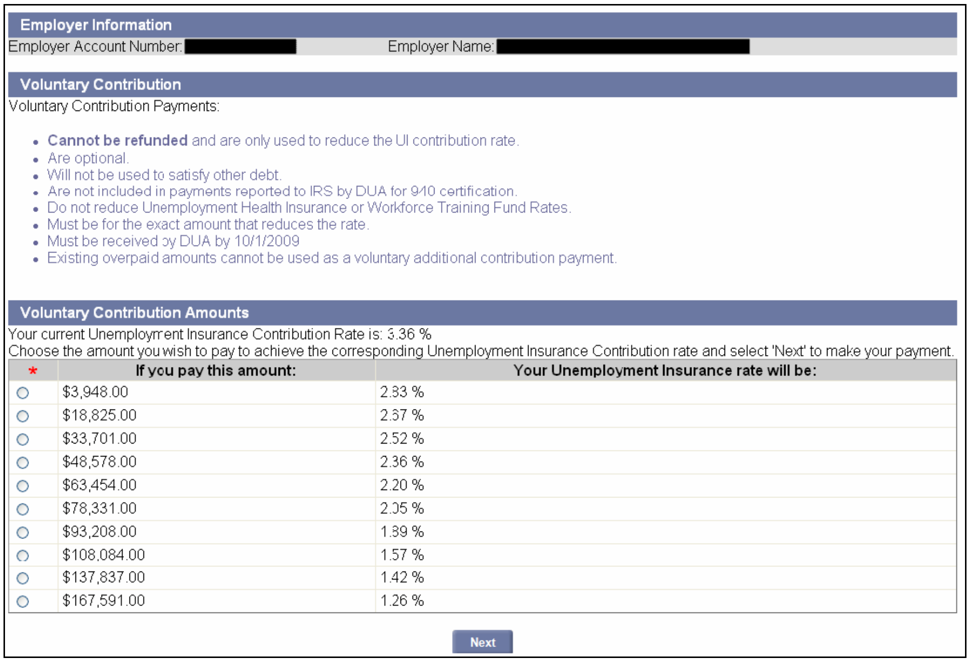
DUA urges you to read and understand these guidelines before making a contribution; they are available on www.mass.gov. Also see the section, *Getting Support from DUA*, for contact information if you need additional advice.

Making a Voluntary Contribution

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Voluntary Contribution** link.



3. The **Voluntary Contribution** page appears, with the suggested payments and corresponding tax rates that would result. Choose a payment amount and click **Next** to continue.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Voluntary Contribution

Voluntary Contribution Payments:

- **Cannot be refunded** and are only used to reduce the UI contribution rate.
- Are optional.
- Will not be used to satisfy other debt.
- Are not included in payments reported to IRS by DUA for 940 certification.
- Do not reduce Unemployment Health Insurance or Workforce Training Fund Rates.
- Must be for the exact amount that reduces the rate.
- Must be received by DUA by 10/1/2009
- Existing overpaid amounts cannot be used as a voluntary additional contribution payment.

Voluntary Contribution Amounts

Your current Unemployment Insurance Contribution Rate is: 3.36 %

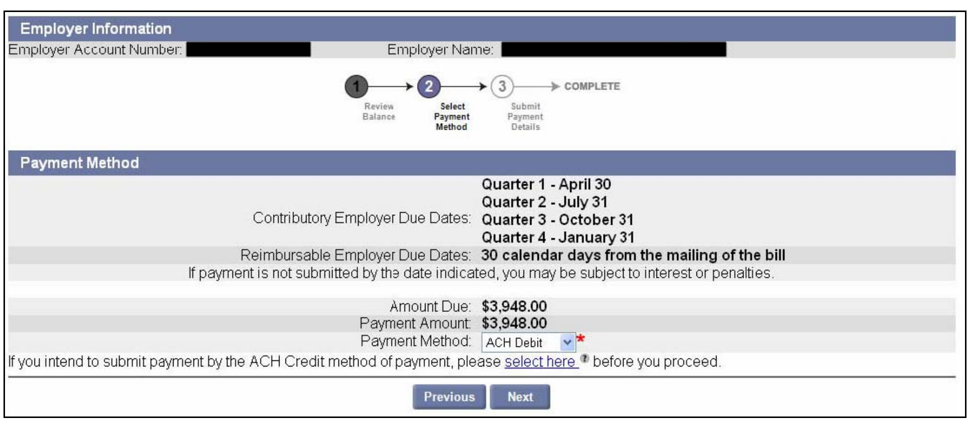
Choose the amount you wish to pay to achieve the corresponding Unemployment Insurance Contribution rate and select 'Next' to make your payment.

*	If you pay this amount:	Your Unemployment Insurance rate will be:
	$3,948.00	2.83 %
	$18,825.00	2.67 %
	$33,701.00	2.52 %
	$48,578.00	2.36 %
	$63,454.00	2.20 %
	$78,331.00	2.05 %
	$93,208.00	1.89 %
	$108,084.00	1.57 %
	$137,837.00	1.42 %
	$167,591.00	1.26 %

Next

4. The **Payment Method** page appears. Select a payment type and click **Next**. (For detailed information on making a payment, proceed to the section, *Payment Information*.)

NOTE: The Voluntary Contribution process is launched from Account Maintenance; however the process completes under the Payment Information area of the software.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

1 Review Balance → 2 Select Payment Method → 3 Submit Payment Details → COMPLETE

Payment Method

Contributory Employer Due Dates: **Quarter 1 - April 30**, **Quarter 2 - July 31**, **Quarter 3 - October 31**, **Quarter 4 - January 31**

Reimbursable Employer Due Dates: **30 calendar days from the mailing of the bill**

If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Amount Due: **$3,948.00**

Payment Amount: **$3,948.00**

Payment Method: ACH Debit *

If you intend to submit payment by the ACH Credit method of payment, please select here before you proceed.

Previous Next

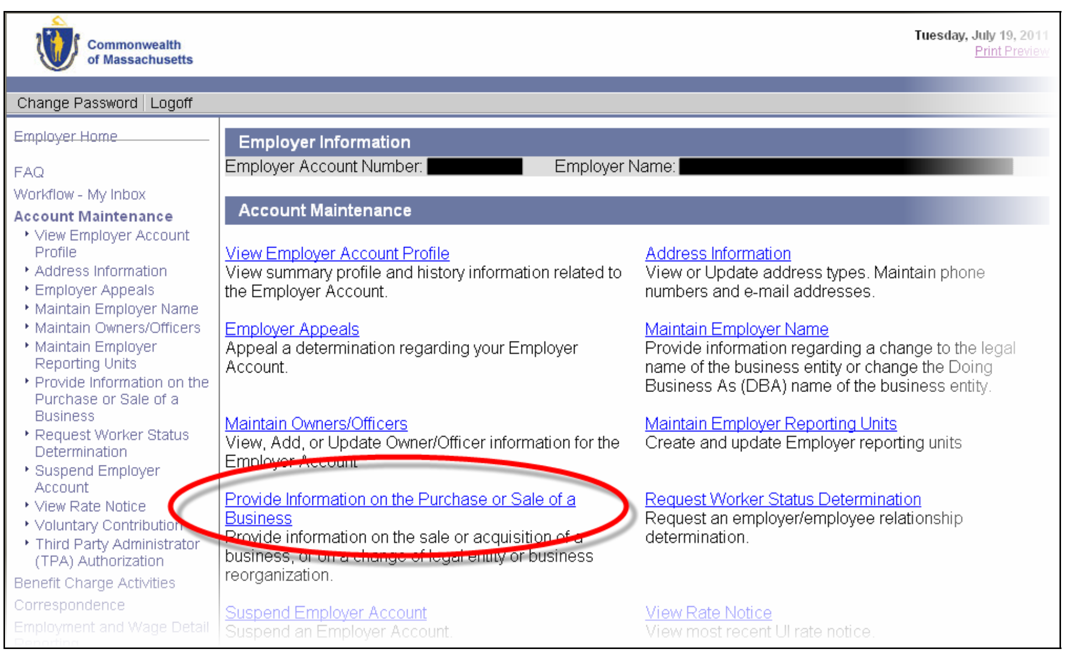
PROVIDE INFORMATION ON THE PURCHASE OR SALE OF A BUSINESS

Introduction	Experience transfers are initiated by the purchase or sale or change of legal entity type of all or part of a business. The system will determine ownership type, common or non-common, and the type of transfer, full or partial, and will make a determination on the transfer. New tax rates will then be assigned for your account. This section of the document will explain how an authorized user can provide information on the sale or purchase of a business. The system allows you to enter one of four different reasons to initiate an experience transfer and the information you are required to provide will vary according to the reason. The procedure differs, depending on whether you: • *Purchased, Re-organized, Consolidated, Merged, or Acquired a Business*, or • *Sold a Business* Use the procedure that conforms to the type of transfer that occurred with your business. **NOTE**: If you sell all of your business, once you submit the sale information, the software will automatically allow you to proceed with the Suspend Employer Account process.

Purchased, Re-organized, Consolidated, Merged or Acquired a Business.

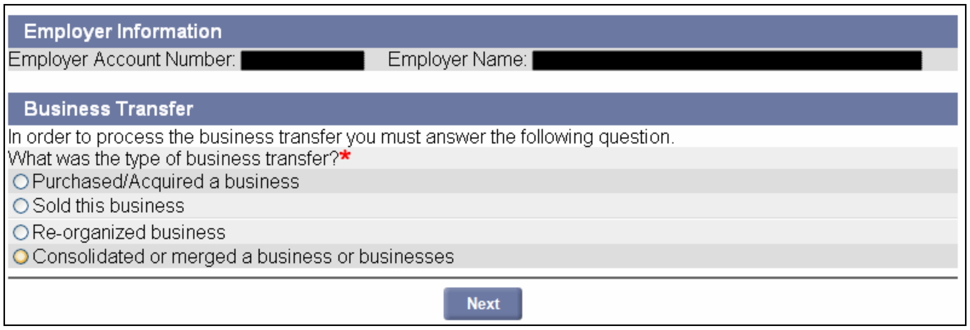
The instructions below are applicable if you: 1. purchased a business; 2. re-organized a business; or 3. consolidated, merged or acquired a business.

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Provide Information on the Purchase or Sale of a Business** link.



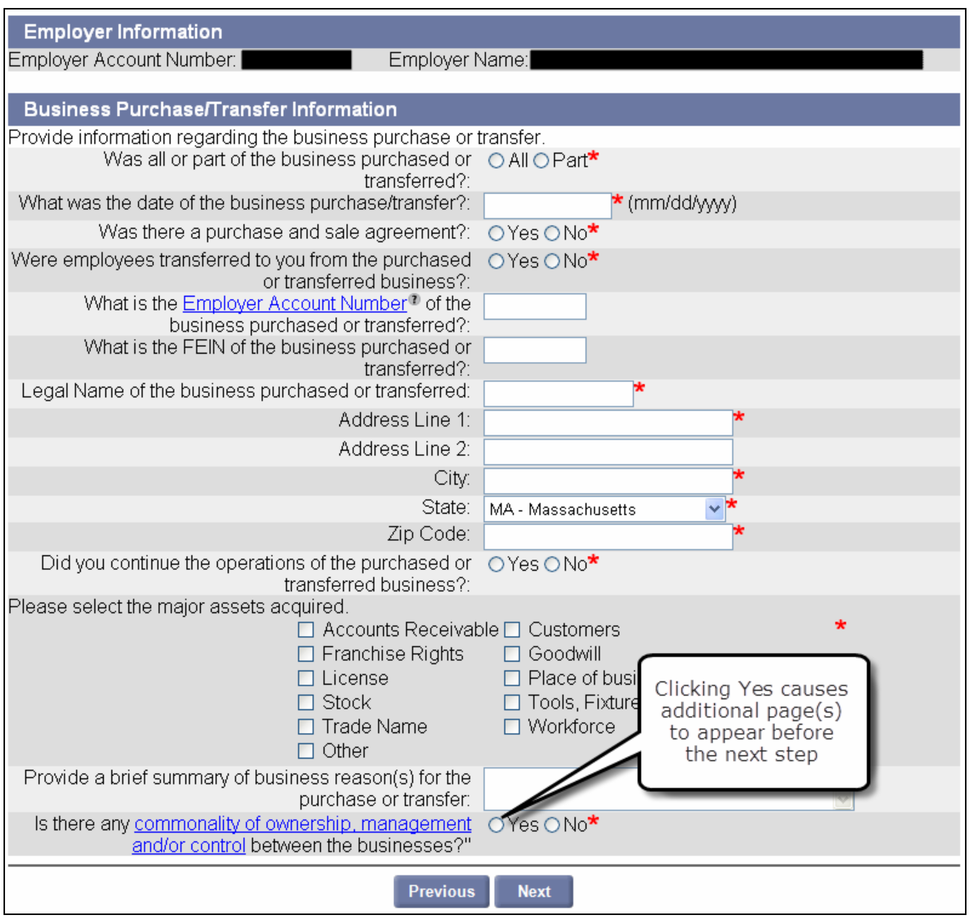
3. The **Business Transfer** page appears. Select the type of business transfer and click **Next**.

   NOTE: If you sold your business, skip to the next section, *Sold a Business*.

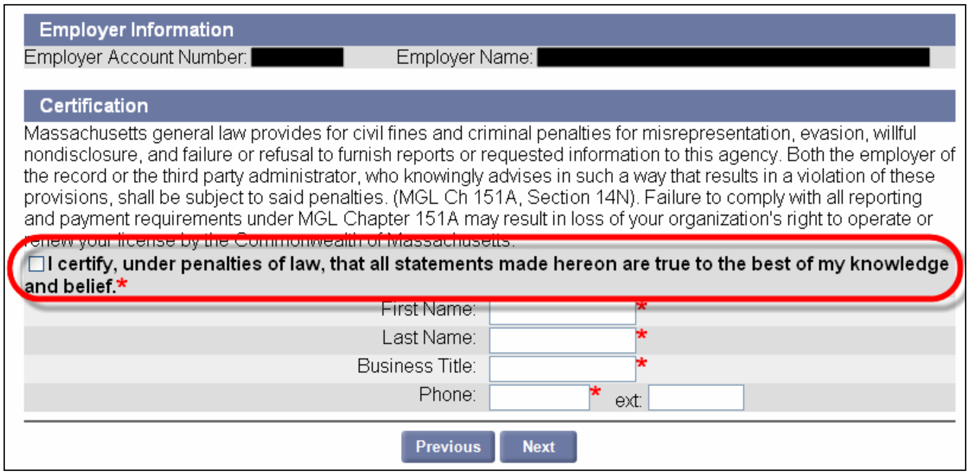


4. The **Business Purchase/Transfer Information** page appears. Enter the requested information and click **Next**.

   NOTE: If you click **Yes** for the **Commonality of Ownership** question, one or more pages will display before the page described in **Step 5**. Enter requested information and resume at **Step 5**.



5. The **Certification** page appears. Fill in the requested information, check the certification box, and click **Next**.



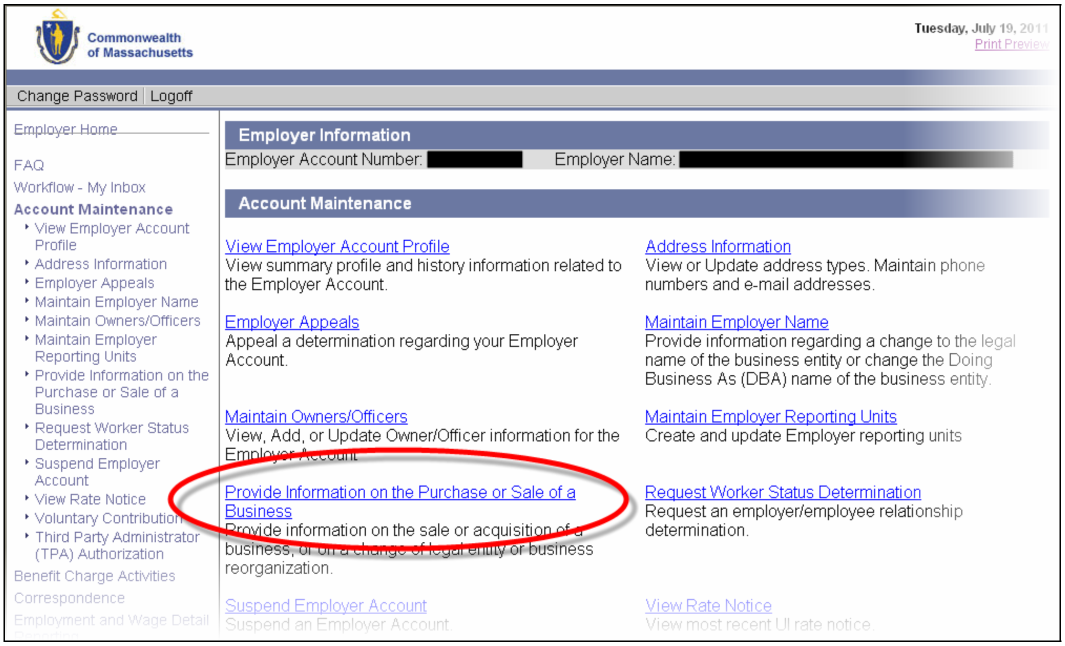
6. The **Business Purchase** page appears. If you have additional business(s) to add to the list, click **Add**. Repeat **steps 4**, **5**, and **6**. When all businesses are added, click **Submit**.

7. The **Business Purchase** page changes to indicate that your information has been received.

Sold a Business

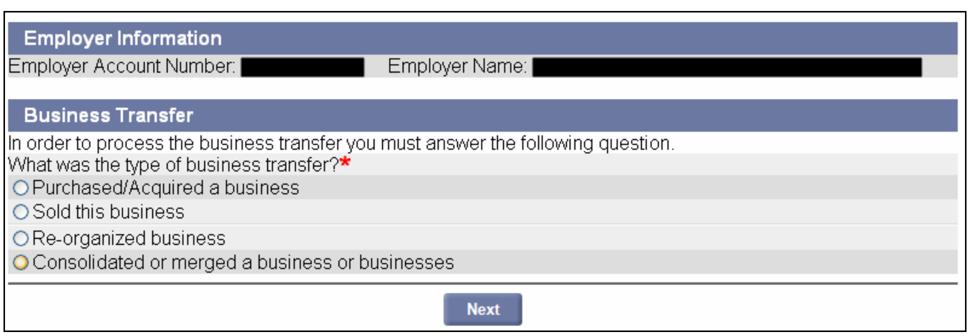
The instructions below are applicable if you have sold your business.

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Provide Information on the Purchase or Sale of a Business** link.



3. The **Business Transfer** page appears. Select **Sold this business** and click **Next**.

   NOTE: If you purchased, acquired, re-organized, consolidated, or merged your business, see the previous section instead.



4. The **Business Sale Information** page appears. Add information about the sale. Indicate whether you sold **all** or **part** of the business. Fill in the Certification information, check the certification box, and click **Save**.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Business Sale Information

- If you sold your business to more then one entity, enter the information for each business in the Add Business Sale Information section below. Select 'Save' after adding each business.
- Select 'Submit' when you have saved all businesses involved in the transaction. You must save the information before you submit.

Add Business Sale Information

Provide information regarding the sale of your business.

Was all or part of the business sold?:	○ All ○ Part*
If all of the business was sold, what was the date of last payroll?:	(mm/dd/yyyy)
What was the effective date of the business transfer?:	* (mm/dd/yyyy)
Will you continue to be in business in Massachusetts?:	○ Yes ○ No*
Was there a purchase and sale agreement?:	○ Yes ○ No*
Were employees transferred to the purchaser?:	○ Yes ○ No*
Purchaser FEIN (if known):	
Legal Name of Purchaser:	*
DBA Name of Purchaser:	
Address Line 1:	*
Address Line 2:	
City:	*
State:	MA - Massachusetts *
Zip Code:	*
Provide a brief summary of business reason(s) for the sale:	*

Certification

Massachusetts general law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this agency. Both the employer of the record or the third party administrator, who knowingly advises in such a way that results in a violation of these provisions, shall be subject to said penalties (MGL chapter 151A, Section 14N). Failure to comply with all reporting and payment requirements under MGL Chapter 151A may result in loss of your organization's right to operate or renew your license by the Commonwealth of Massachusetts.

☐ **I certify, under penalties of law, that all statements made hereon are true to the best of my knowledge and belief.***

First Name:	*
Last Name:	*
Business Title:	*
Phone:	* ext:

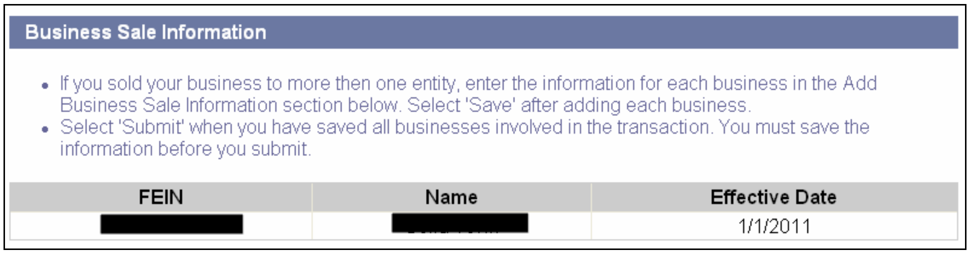
Save

Be sure the information you have entered is correct, you will not be able to edit it after it has been saved. Select 'Submit' after all business(es) information has been saved.

Previous Submit

5. If you sold your business to more than one entity, repeat **Step 4** for each entity. Make sure to click **Save** after each.

   NOTE: Each time you click **Save**, the entity you added gets added to the list in the Business Sale Information area.



Business Sale Information

- If you sold your business to more then one entity, enter the information for each business in the Add Business Sale Information section below. Select 'Save' after adding each business.
- Select 'Submit' when you have saved all businesses involved in the transaction. You must save the information before you submit.

FEIN	Name	Effective Date
[redacted]	[redacted]	1/1/2011

6. When all entities have been entered, click **Submit**.

   - If you only sold **part** of your business, the **Business Sale Information** page reappears indicating that the information has been submitted.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Business Sale Information

The sale information has been submitted. You may be contacted by Agency Staff for more information.

   - If you sold **all** of your business, the **Business Sale Information** page also directs you to suspend your business account. Click the **Next** button. Proceed to the section, *Suspend Employer Account*, for detailed instructions.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Business Sale Information

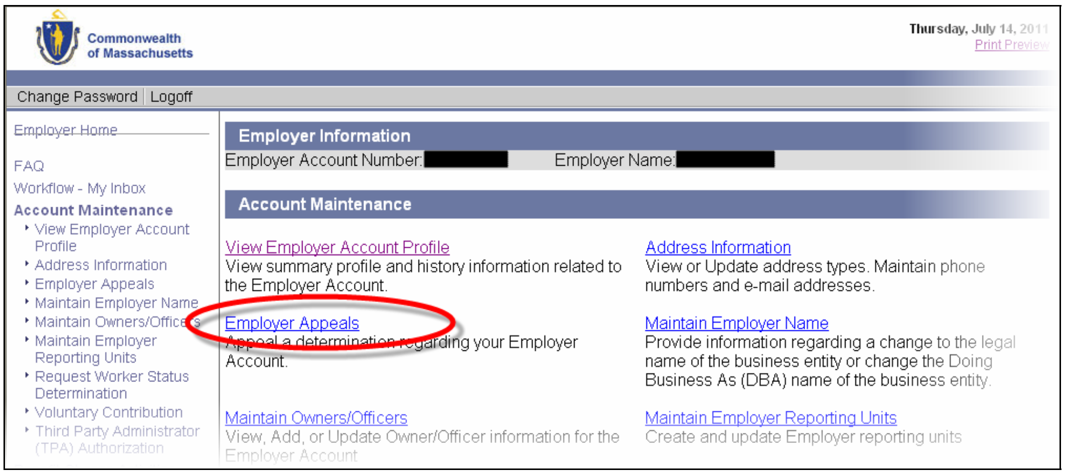
The sale information has been submitted. You may be contacted by Agency Staff for more information. Select 'Next' to suspend your account for Unemployment Insurance filing.

Next

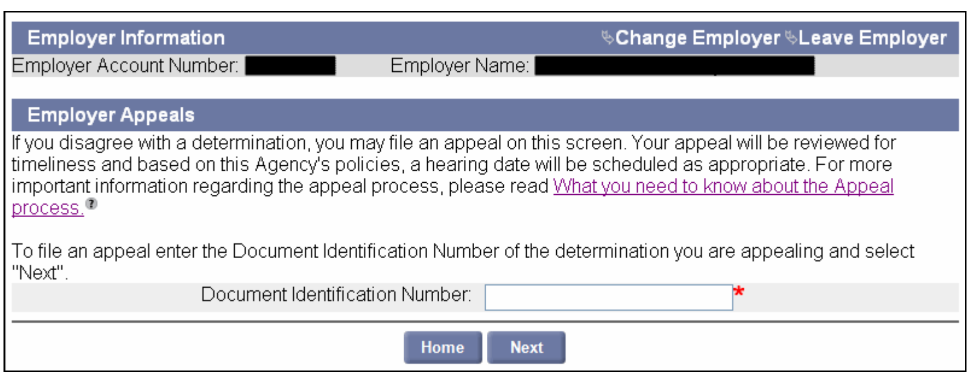
EMPLOYER APPEALS

Introduction	This section describes how to file an appeal against a Determination on an Employer account. The Document ID (from QUEST) of the Determination will be required to begin the process. Upon submission of your appeal, DUA staff will review your appeal. If your appeal is timely, staff may choose to forward the Appeal to the Hearings Department or perform account resolution without forwarding the Appeal to the Hearings Department.

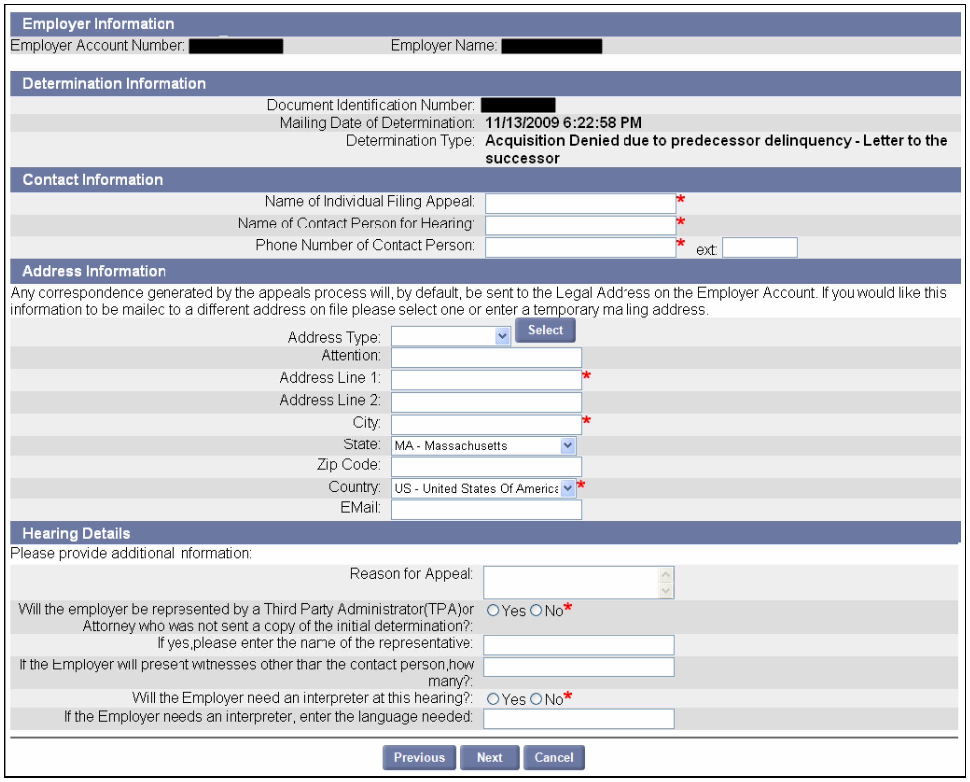
1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Employer Appeals** link.



3. The **Employer Appeals** page appears. Enter the **Document ID** from the Determination correspondence. Click **Next**.

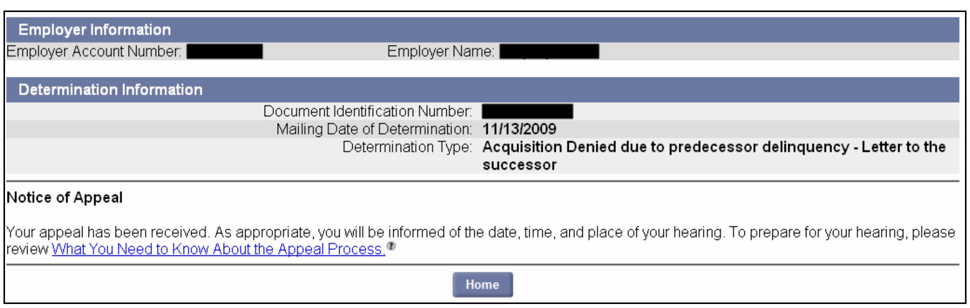


4. The **Determination Information** page appears. Enter all requested information and click **Next**.



5. The **Confirmation** page appears. Review the appeal details for confirmation. Confirm by clicking **Submit**.

6. The page reappears indicating that the filing is complete.

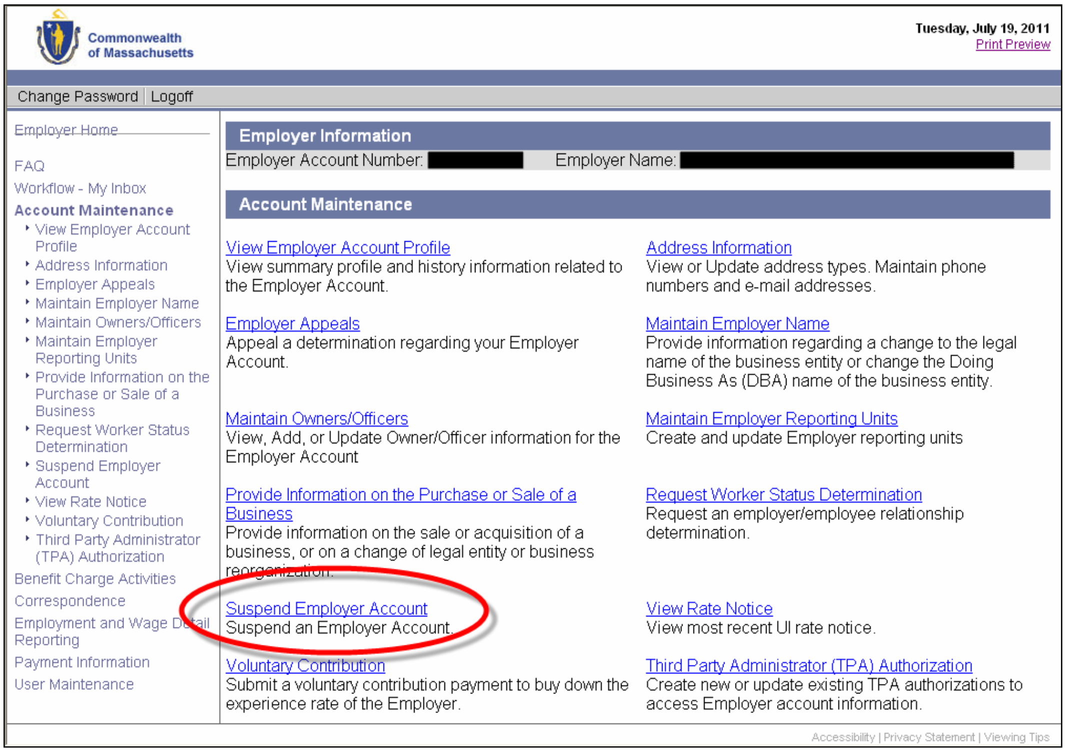


SUSPEND EMPLOYER ACCOUNT

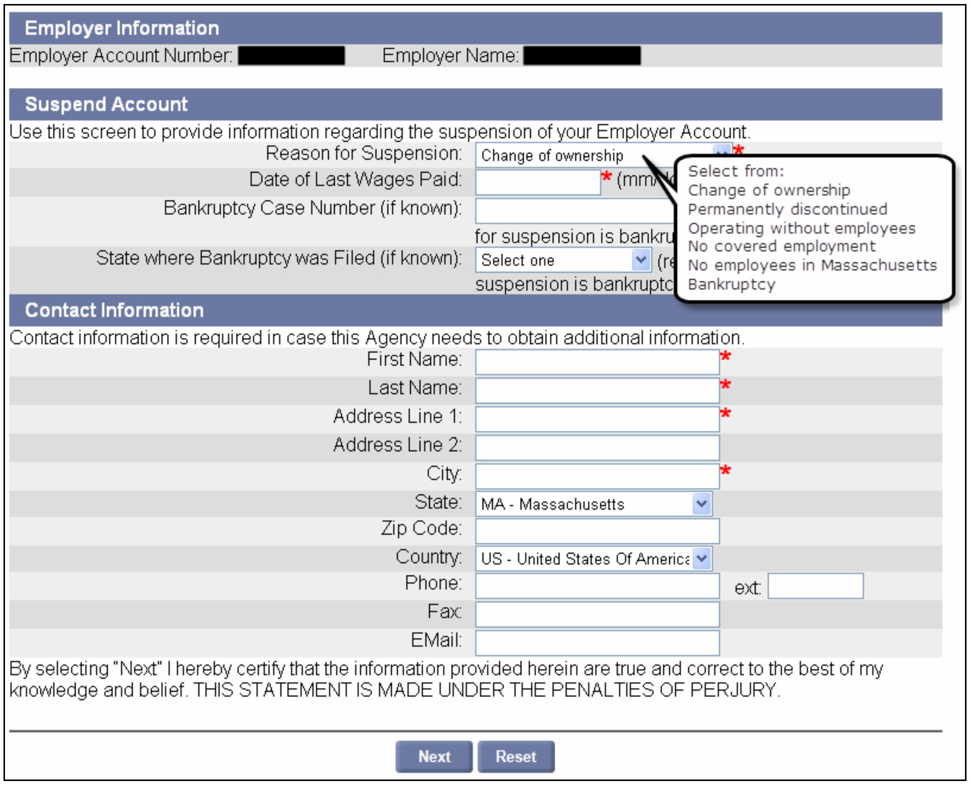
Introduction	This section describes how to request an Employer account suspension. The Employer account suspension can occur with or without DUA approval/intervention. If the reason for your request is permanent closure of business and if your account meets certain criteria, the system will suspend the account immediately. In other cases, the request must be reviewed by authorized DUA staff to approve or deny the suspension.

Suspending an Employer Account

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Suspend Employer Account** link.



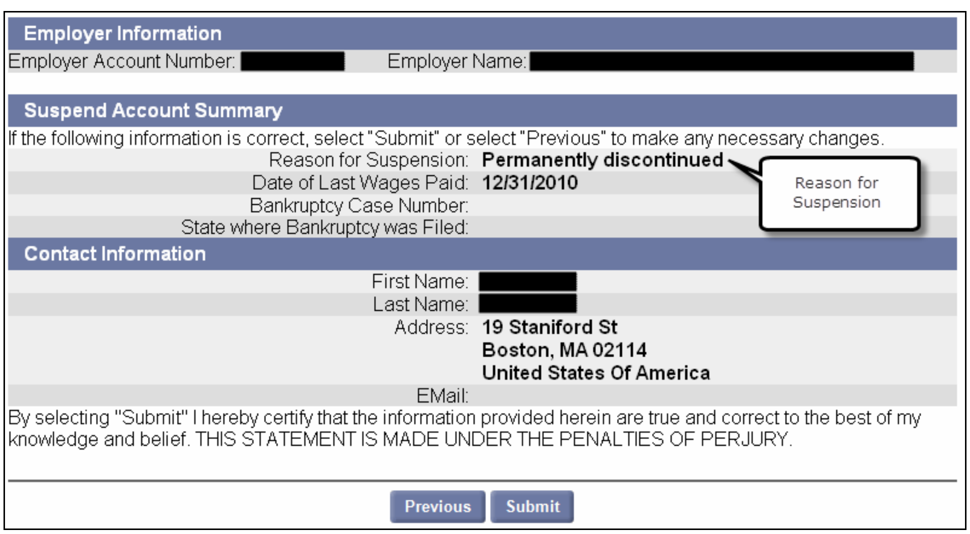
3. The **Suspend Account** page appears. Select the reason for suspension and provide other requested information. Click **Next**.



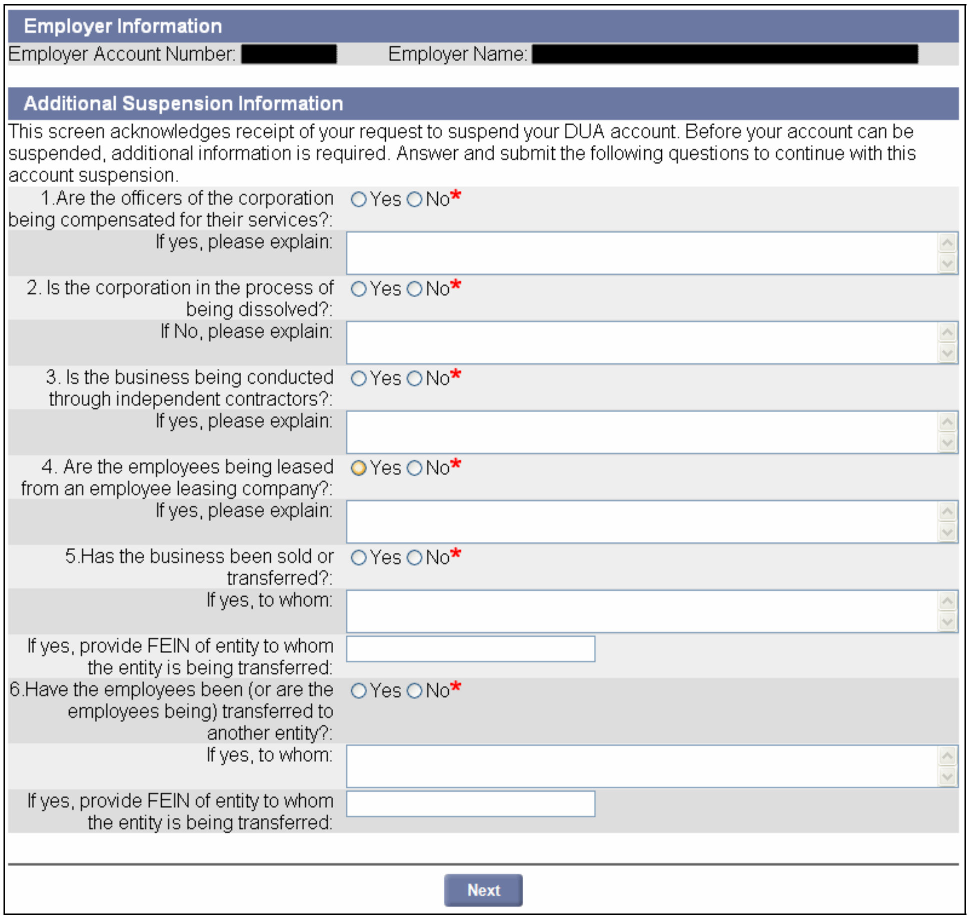
4. If the **Address Validation** page appears, select the address that is closest to your actual address. Click **Next**.

   NOTE: If applicable, select the address with the 9-digit extended Zip code (known as “Zip +4”).

5. The **Suspend Account Summary** page appears, displaying the reason for suspension. Review the information and click **Submit**.



6. If an **Additional Suspension Information** page appears, fill in the requested information and click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Additional Suspension Information

This screen acknowledges receipt of your request to suspend your DUA account. Before your account can be suspended, additional information is required. Answer and submit the following questions to continue with this account suspension.

1.Are the officers of the corporation being compensated for their services?:	Yes No*
If yes, please explain:	
2. Is the corporation in the process of being dissolved?:	Yes No*
If No, please explain:	
3. Is the business being conducted through independent contractors?:	Yes No*
If yes, please explain:	
4. Are the employees being leased from an employee leasing company?:	Yes No*
If yes, please explain:	
5.Has the business been sold or transferred?:	Yes No*
If yes, to whom:	
If yes, provide FEIN of entity to whom the entity is being transferred:	
6.Have the employees been (or are the employees being) transferred to another entity?:	Yes No*
If yes, to whom:	
If yes, provide FEIN of entity to whom the entity is being transferred:	

Next

7. If the request has been received but the system has not processed it completely, the **Request to Suspend Processing** page appears.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Request to Suspend Processing

Your request to suspend is being reviewed. You may be contacted by staff from this Agency for additional information. If you have indicated that you are suspending your account due to a bankruptcy, please contact this Agency at : 6176265050

If you need to send any documentation associated with this suspension request, please print this page, attach it to your documentation, and mail to this Agency at:

Division of Unemployment Assistance
19 Staniford Street
Charles F. Hurley Building
Boston, MA 02114

Home

8. Once processing is complete, the **Confirmation of Suspension of Account** page displays instead.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Confirmation of Suspension of Account

The Massachusetts UI Program records indicate that you suspended your UI account effective 4/1/2011

REPORTING REQUIREMENTS FOR SUSPENDED ACCOUNTS

You are responsible for filing quarterly employment and wage detail reports for all quarters in which you pay wages to any person working or living in Massachusetts. These reports are due on the last day of the month following the end of the calendar quarter.

If suspended mid-quarter and no continuing monies are to be reported to Department of Revenue (DOR), you may submit the employment and wage detail immediately after the effective suspension date.

Interest is assessed for any payments that are paid after the due date. To avoid assessment of interest, please submit your employment and wage detail reports on a timely basis until the suspension date, even if there are no wages to report.

REVIVAL OF ACCOUNT

If you resume operations again under the same legal entity, and again pay wages, you must reinstate your UI account. For information regarding revival with the Massachusetts UI Program, please refer to www.mass.gov

DEBT FOLLOWING SUSPENSION

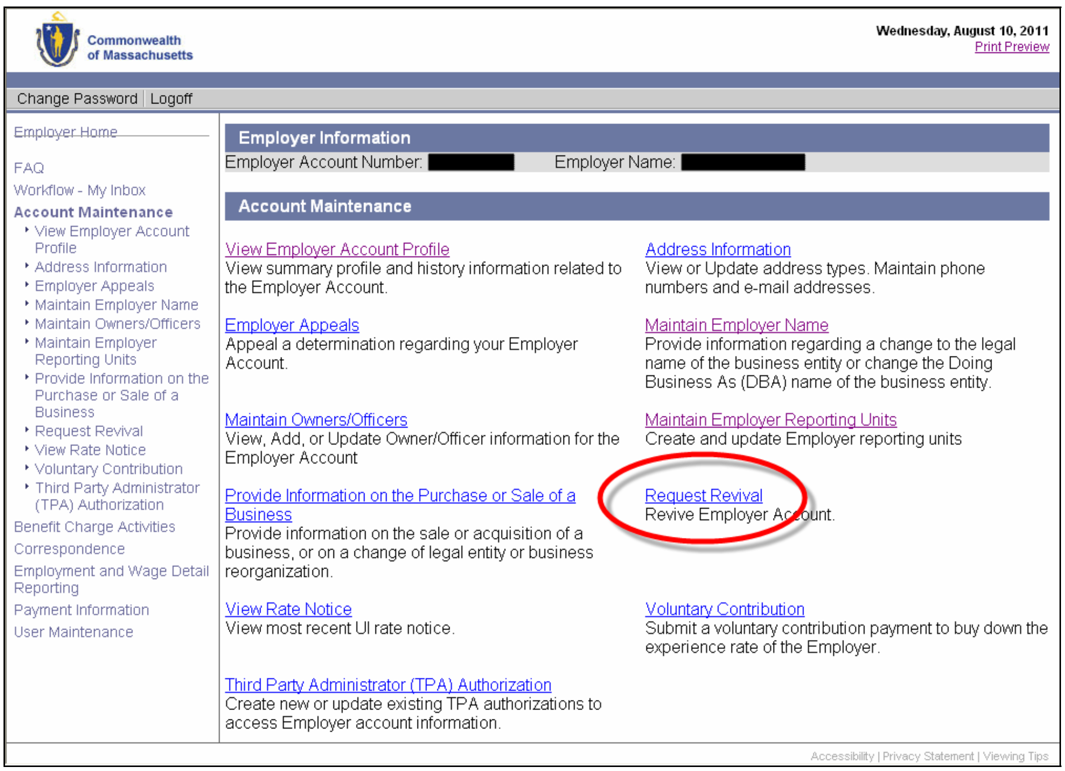
If this account has unpaid debt, that debt must be paid even though the account has been suspended. Interest will accrue until the debt has been paid.

REVIVE EMPLOYER ACCOUNT

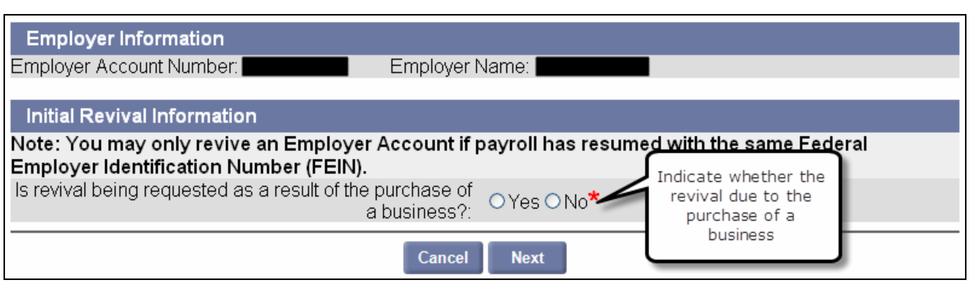
Introduction	This section describes how to revive an Employer account. The Employer account can be revived from a state of suspension, when an Employer elects to revive their account. Upon revival, tax rates will be calculated based on experience factors from the previously suspended account. If Revival request is due to purchase of a business, you will be prompted to complete the process – *Provide Information on the Purchase or Sale of a Business*.

Requesting an Account Revival

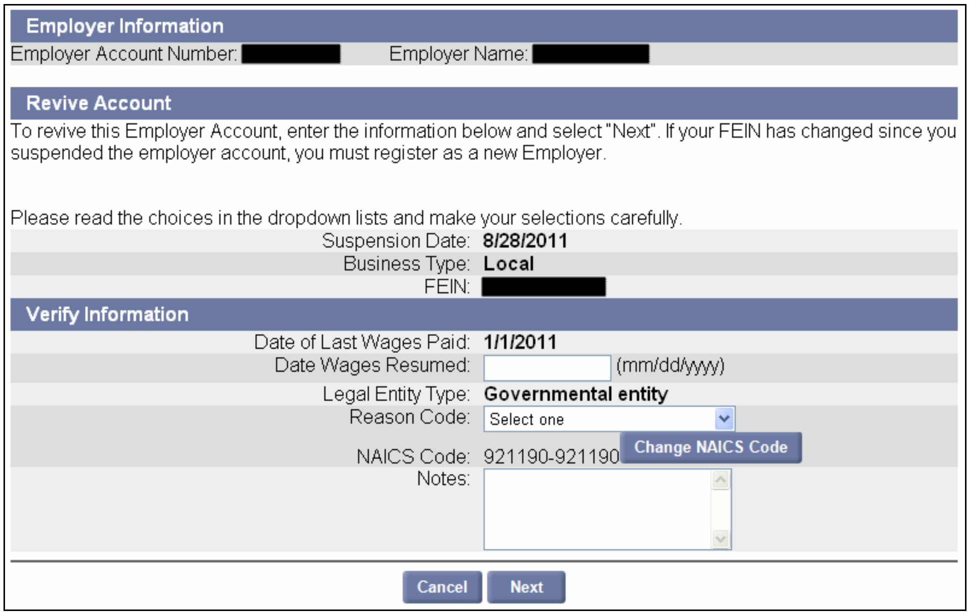
1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Request Revival** link.



3. The **Initial Revival Information** page appears. Click **Yes** or **No** where asked if the revival is being requested as a result of the purchase of a business. Click **Next**.



4. If the **Revive Account** page appears, enter the requested information and click **Next**.


Employer Information
Employer Account Number: [redacted] Employer Name: [redacted]

Revive Account
To revive this Employer Account, enter the information below and select "Next". If your FEIN has changed since you suspended the employer account, you must register as a new Employer.

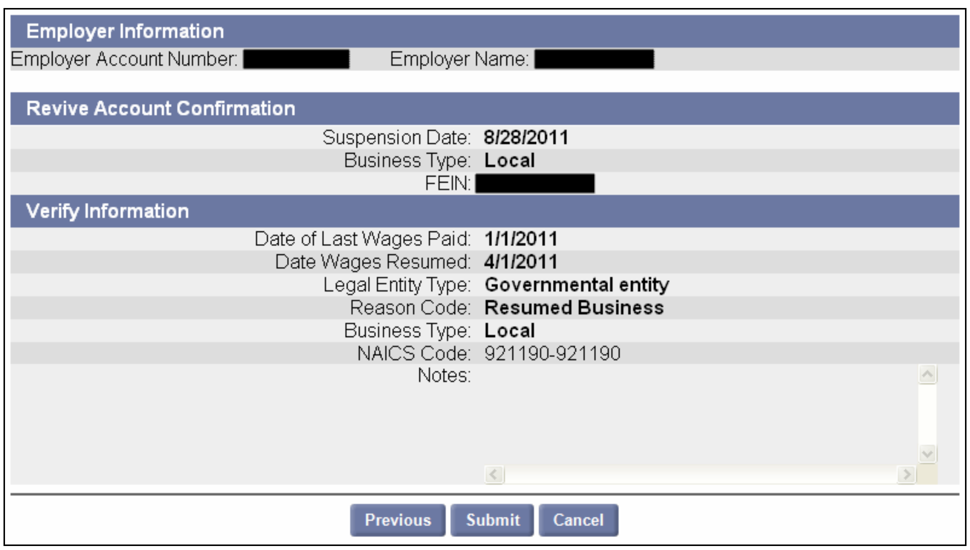
Please read the choices in the dropdown lists and make your selections carefully.

Suspension Date: **8/28/2011**
Business Type: **Local**
FEIN: [redacted]

Verify Information
Date of Last Wages Paid: **1/1/2011**
Date Wages Resumed: (mm/dd/yyyy)
Legal Entity Type: **Governmental entity**
Reason Code: Select one
NAICS Code: 921190-921190 Change NAICS Code
Notes:

Cancel Next

5. The **Revive Account Confirmation** page appears. Click **Submit**.

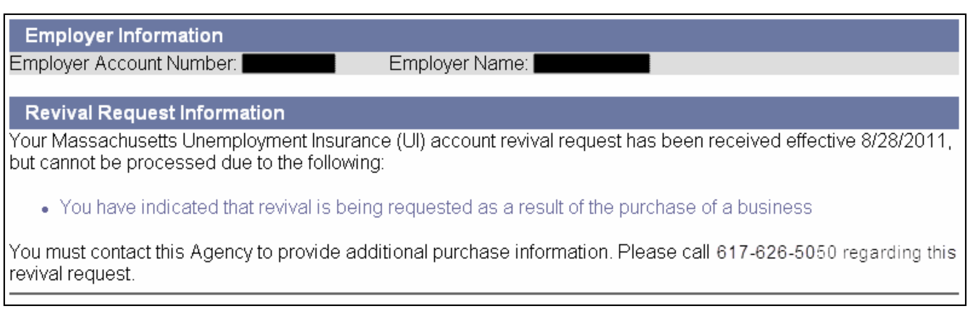

Employer Information
Employer Account Number: [redacted] Employer Name: [redacted]

Revive Account Confirmation
Suspension Date: **8/28/2011**
Business Type: **Local**
FEIN: [redacted]

Verify Information
Date of Last Wages Paid: **1/1/2011**
Date Wages Resumed: **4/1/2011**
Legal Entity Type: **Governmental entity**
Reason Code: **Resumed Business**
Business Type: **Local**
NAICS Code: 921190-921190
Notes:

Previous Submit Cancel

6. If you are reviving the account due to the purchase of a business you will be instructed to contact DUA.


Employer Information
Employer Account Number: [redacted] Employer Name: [redacted]

Revival Request Information
Your Massachusetts Unemployment Insurance (UI) account revival request has been received effective 8/28/2011, but cannot be processed due to the following:

- You have indicated that revival is being requested as a result of the purchase of a business

You must contact this Agency to provide additional purchase information. Please call 617-626-5050 regarding this revival request.

7. If you are reviving the account for a reason other than the purchase of a business, the **Notice of Revival** page appears.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Notice of Revival

Your request for revival for [redacted] has been processed with an effective date of 8/28/2011. Written confirmation of this determination will follow.
Note: Previously-created reporting units have been inactivated.

Quarterly Employment and Wage Detail Report Information

You will be required to submit quarterly employment and wage detail reports. Quarterly reports are due by the last day of the month following the end of the quarter. Please complete and submit the reports with your payments promptly. Interest charges are mandated by law on overdue contributions.

The information provided during your revival indicates that you are required to submit an employment and wage detail report for the following quarters.

Quarter/Year	Due Date	Status
2-2011	7/31/2011	Delinquent

Home

Benefit Charge Activities

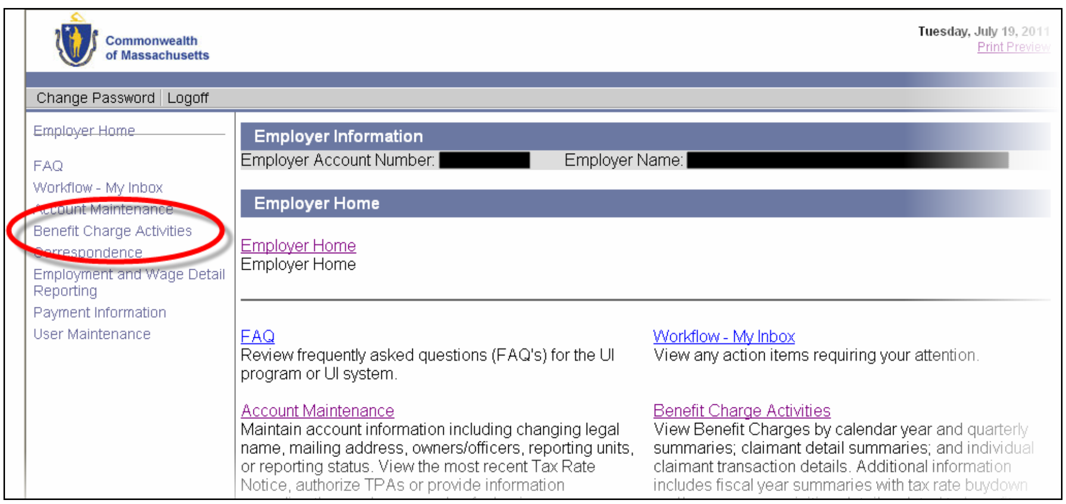
ABOUT BENEFIT CHARGE ACTIVITIES

Introduction	This section describes how to retrieve and view benefit charges on the Employer account. Benefit charges can be retrieved via: • Benefit Charges Search. • Calendar Year Summary and Detail. • Rated Year Summary.
Helpful Tip	Throughout the **Benefit Charge Activities** area, SSNs may display with the first 6 digits masked. If you are reviewing tables with multiple rows of data, it may be helpful if you sort the data by another column (for example, Employee Name or Date). If a table is sortable by a column, the column header appears in **bold blue underlined** text.

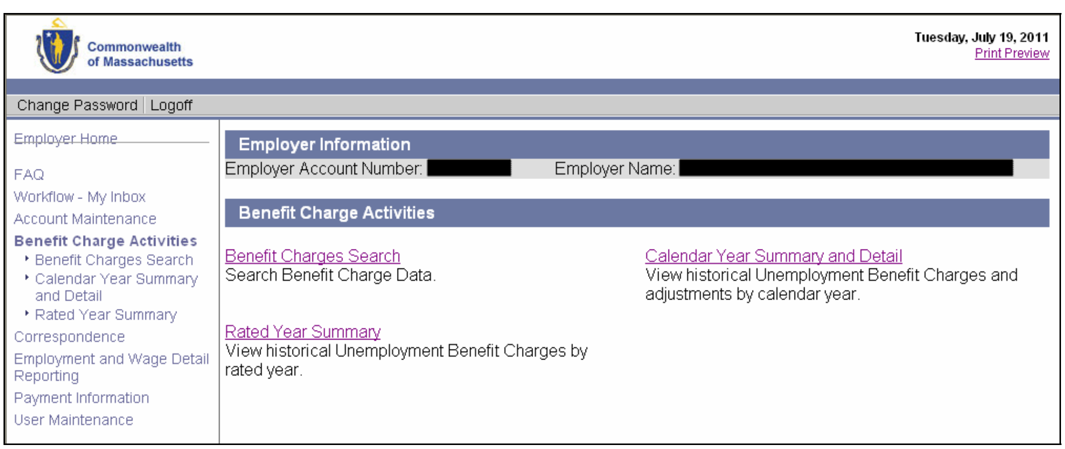
NAVIGATING TO BENEFIT CHARGE ACTIVITIES

To navigate to the **Benefit Charge Activities** page, perform the following steps:

1. Log in to QUEST. Click the **Benefit Charge Activities** link in the left pane (the link also appears on the main pane of the Employer Home page).



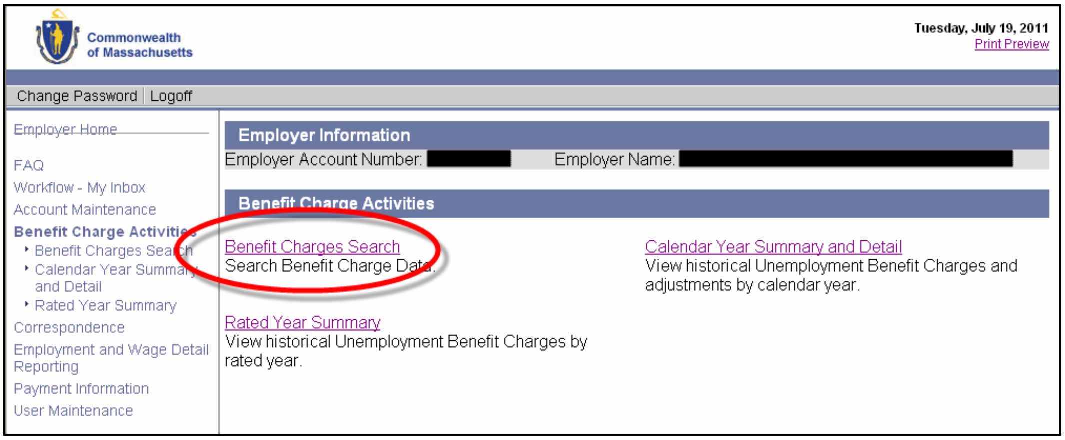
2. The **Benefit Charge Activities** page appears. Available benefit charge functions are listed in links in the left pane as well as the main pane. Click a link to access a function.



BENEFIT CHARGES SEARCH

This function allows the user to search for benefit charges data by the individual claimant name/SSN. The user also has the option to limit the search results to calendar year or rated year.

1. Follow the steps in the section, *Navigating to Benefit Charge Activities*.
2. Click **Benefit Charges Search**.



3. The **Benefit Charge Search** page appears. Enter search criteria (to see all charges, leave the criteria blank). Click **Search**.

4. The search results display under the search grid.

5. Click an **SSN** to display claimant details.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Claimant Account Summary Information

SSN	Last Name	First Name	Claim Effective Date	Dependency Allowance	Maximum Potential Benefits Allowed	Total Charges
000-00-0000	[redacted]	[redacted]	4/27/2008	$0.00	$562.86	$0.00

Individual Claimant Detail Information

Rows 1-10 of 36 ◄ 1 2 3 4 ► Page 1 of 4

Transaction Date	Week Paid	Unit	Activity	Benefit Charges	Dependency Allowance	Program	Total Benefits Charged
6/10/2008	6/7/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
6/16/2008	6/14/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
6/24/2008	6/21/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
7/1/2008	6/28/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
7/7/2008	7/5/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
7/14/2008	7/12/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
7/22/2008	7/19/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
7/28/2008	7/26/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
8/4/2008	8/2/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00
8/11/2008	8/9/2008	0	Payment	$0.00	$0.00	Regular Federal Benefits	$0.00

Rows 1-10 of 36 ◄ 1 2 3 4 ► Page 1 of 4

Previous

CALENDAR YEAR SUMMARY AND DETAIL

Use this function to view historical Unemployment Benefit Charges and adjustments by calendar year.

1. Follow the steps in the section, *Navigating to Benefit Charge Activities*.
2. Click **Calendar Year Summary and Detail**.
3. The **Benefit Charge Calendar Year Summary** page appears. Amounts listed on the page reflect the total benefit charges and adjustments made during each reporting period.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Benefit Charge Calendar Year Summary

Amounts listed below reflect the total benefit charges and adjustments made during each reporting period.

	Time Period					
Calendar Year	Begin	End	Contributory Charges	Reimbursable Charges	Dependency Allowance	Benefit Charges
2006	1-1-2006	12-31-2006	$0.00	$0.00	$0.00	$0.00
2008	1-1-2008	12-31-2008	$0.00	$0.00	$0.00	$0.00
2009	[illegible]	[illegible]	517.59	$0.00	$0.00	$517.59

Click to view breakdown by month

Previous

4. Click a year in the **Calendar Year** column to display a breakdown by month for the year.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Benefit Charge Monthly Summary

Annual breakdown of Benefit Charges.

Total Benefit Charges: **$517.59**

Month/Year	Contributory Charges	Reimbursable Charges	Dependency Allowance Charges	Benefit Charges
January 2009	$0.00	$0.00	$0.00	$0.00
February 2009	$0.00	$0.00	$0.00	$0.00
December 2009	$517.59	$0.00	$0.00	$517.59

Previous

5. Click an entry in the **Month / Year** column to display entries on the claimant level.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Benefit Charge Claimant Summary

The individual claimant details below lists Benefit Charges and Adjustments assigned to **December** of year **2009**

Select the SSN link to view all transactions, payments and adjustments, associated with this claimant.

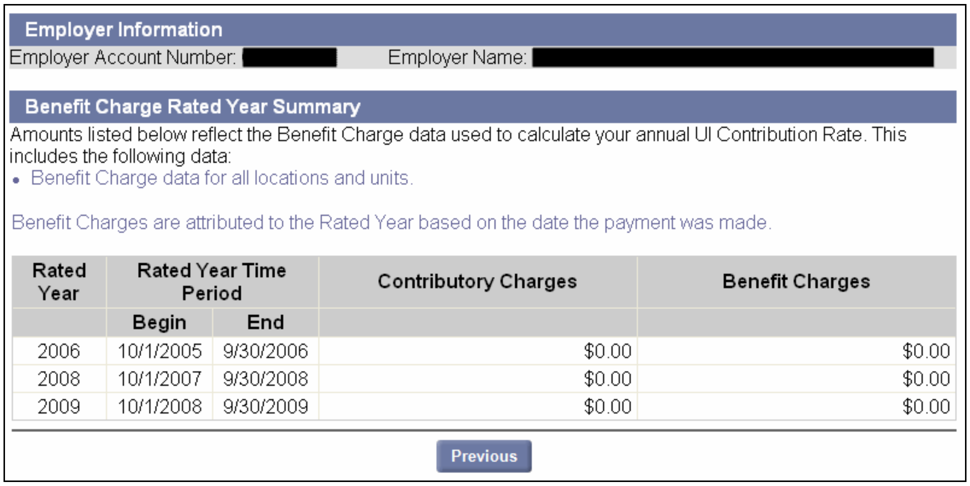
Total Monthly Charges **$517.59**

SSN	Last Name	First Name	Claim Effective Date	Week Paid End Date	Potential Benefit Charges	Remaining Potential Benefit Charges	Weekly Charge Amount
[redacted]	[redacted]	[redacted]	6/14/2009	12/19/2009	$669.87	$295.87	$374.00
[redacted]	[redacted]	[redacted]	6/14/2009	12/12/2009	$669.87	$152.28	$143.59

RATED YEAR SUMMARY

Use this function to view historical Unemployment Benefit Charges by rated year.

1. Follow the steps in the section, *Navigating to Benefit Charge Activities*.
2. Click **Rated Year Summary**.
3. The **Benefit Charge Rated Year Summary** page appears listing the benefit charges by rated year.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Benefit Charge Rated Year Summary

Amounts listed below reflect the Benefit Charge data used to calculate your annual UI Contribution Rate. This includes the following data:

- Benefit Charge data for all locations and units.

Benefit Charges are attributed to the Rated Year based on the date the payment was made.

Rated Year	Rated Year Time Period		Contributory Charges	Benefit Charges
	Begin	End		
2006	10/1/2005	9/30/2006	$0.00	$0.00
2008	10/1/2007	9/30/2008	$0.00	$0.00
2009	10/1/2008	9/30/2009	$0.00	$0.00

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Employment and Wage Detail Reporting

ABOUT EMPLOYMENT AND WAGE DETAIL REPORTING

Introduction

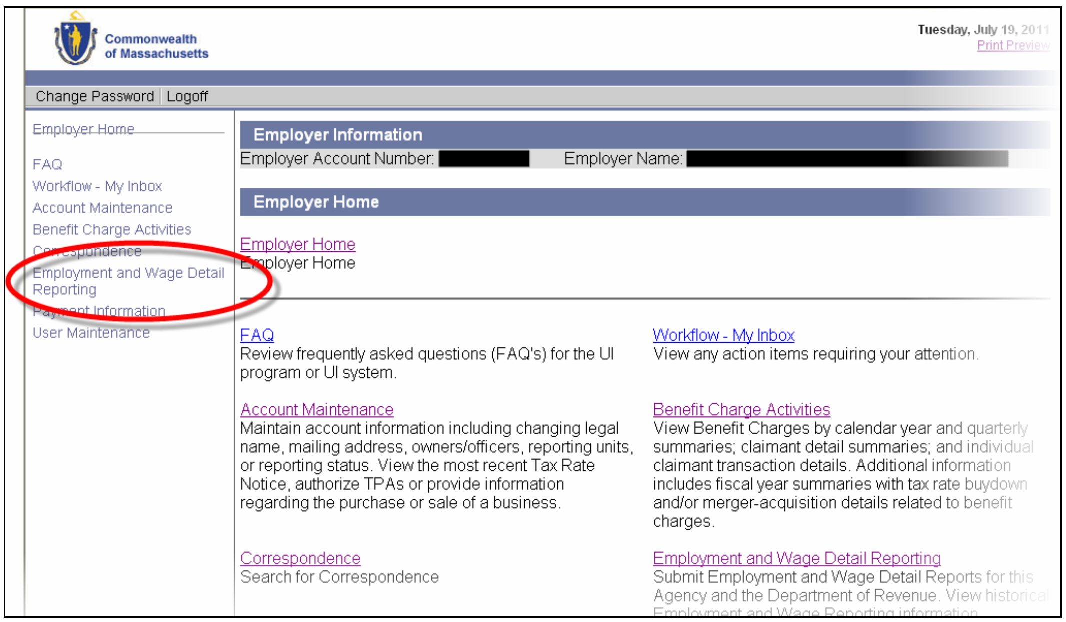
This section describes the activities that Employers perform related to Employment and Wage Detail reporting. Activities include:

- **Submitting** quarterly Employment and Wage Detail reports
- Submitting reports for quarters **prior to 2010**
- **Adjusting** previously submitted Employment and Wage Detail reports
- Viewing Employment and Wage Detail **calculation history**
- Viewing Employment and Wage Detail **history**
- Viewing the **submission history** of Employment and Wage Detail reports

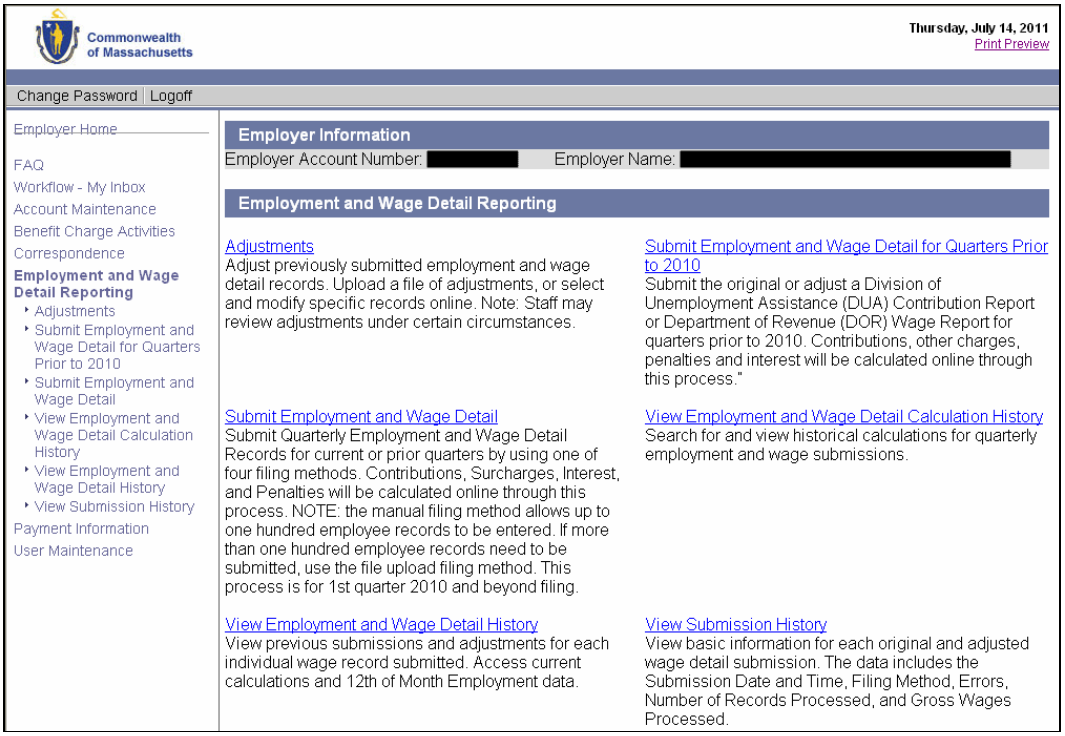
NAVIGATING TO EMPLOYMENT AND WAGE DETAIL REPORTING

To navigate to the **Employment and Wage Detail Reporting** page, perform the following steps:

1. Log in to QUEST. Click the **Employment and Wage Detail Reporting** link in the left pane (the link also appears on the main pane of the Employer Home page).



2. The **Employment and Wage Detail Reporting** page appears. Available functions are listed in links in the left pane as well as the main pane. The main pane also displays explanations of the functions. Click a link to access a function.

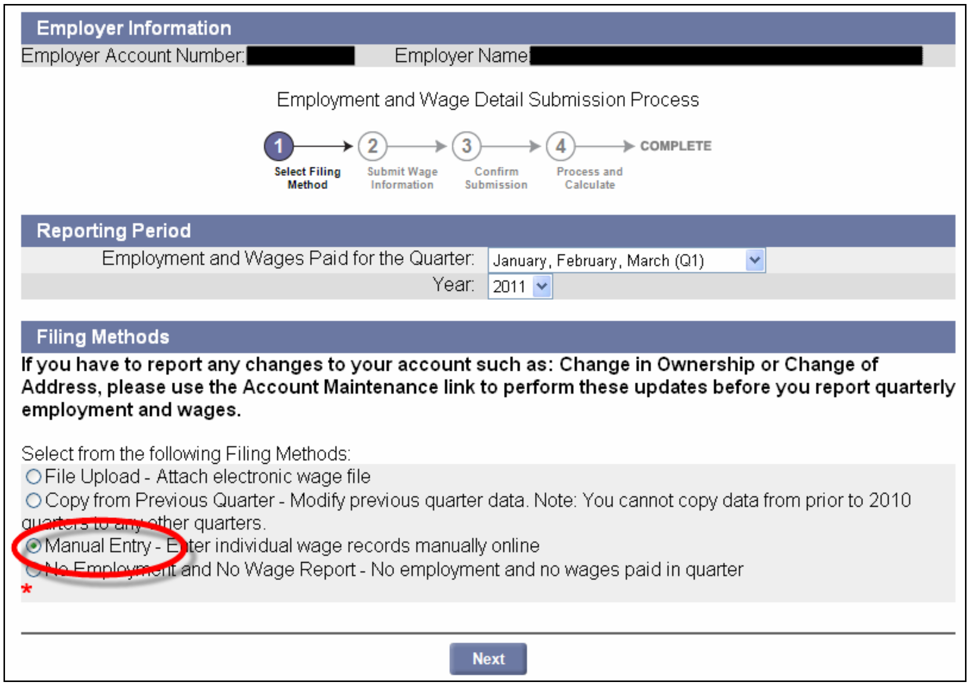


SUBMIT EMPLOYMENT AND WAGE DETAIL

Introduction	This section describes how to submit employment and wage detail information for Employer accounts for Q1 2010 and forward. **Employment and wage detail reports are due from Employers every quarter**. The employment and wage detail information can be submitted for current or prior quarters by using one of these filing methods. • Manual Entry • File Upload (real-time online) • No Employment/Wage Submission • Copy from Previous Quarter, and • FTP file upload. **NOTE**: If you wish to submit employment and wage detail for quarters prior to 2010, please see the section, *Submit Employment and Wage Detail for Quarters Prior to 2010*.
Helpful hints	• The **Manual Entry Method** allows up to one hundred employee records to be entered. If more than one hundred employee records need to be submitted, the **File Upload Method** should be used. • **FTP** file upload is required when Employers/TPA(s) submit more than 29,999 records per quarter. • It is not possible to submit an employment and wage detail report for future dates if the quarter is not open for filing. • The **Gross UI Wages** column applies to wages on which UI and/or UHI is calculated. Reimbursable Employers must also report Gross UI wages for calculating unemployment benefits. (Note that actual UI payment will be based on the first $14,000 each Employee earns in the calendar year.) • If you upload a file but you have not actually **submitted** it yet, its data <u>can</u> be re-uploaded in a corrected file and then submitted using either a **Merge** or **Overwrite** function. • It is not possible to submit an "original" employment and wage detail report more than once for any quarter or using more than one method. If a report was submitted incorrectly or incompletely, the adjustment function should be used to make corrections. (Contact DUA for wage transfers or removals.) • If you submit a report via File Upload, the first report for any quarter should be submitted with an Adjustment Reason Code of "0", indicating an "Original Submission". File Uploads with corrections should have an Adjustment Reason Code of 1 thru 8 to indicate it is an adjustment vs. an original submission. Once a File Upload with Adjustment Reason Code of 0 has been submitted to QUEST for a given quarter filing, QUEST will reject all subsequent filings for that quarter with an Adjustment Reason Code of 0. • **NOTE**: Depending on network or QUEST activity, and/or the size of file: o Your upload may be held for batch processing in "off peak" hours. o Your upload may be processed immediately, but the calculations for contributions, surcharges, interest, and penalties may be performed during "off peak" hours. If this happens, right after you submit the report you will see an on-screen message that notifies you that processing and/or calculations are pending.

Manual Entry Method

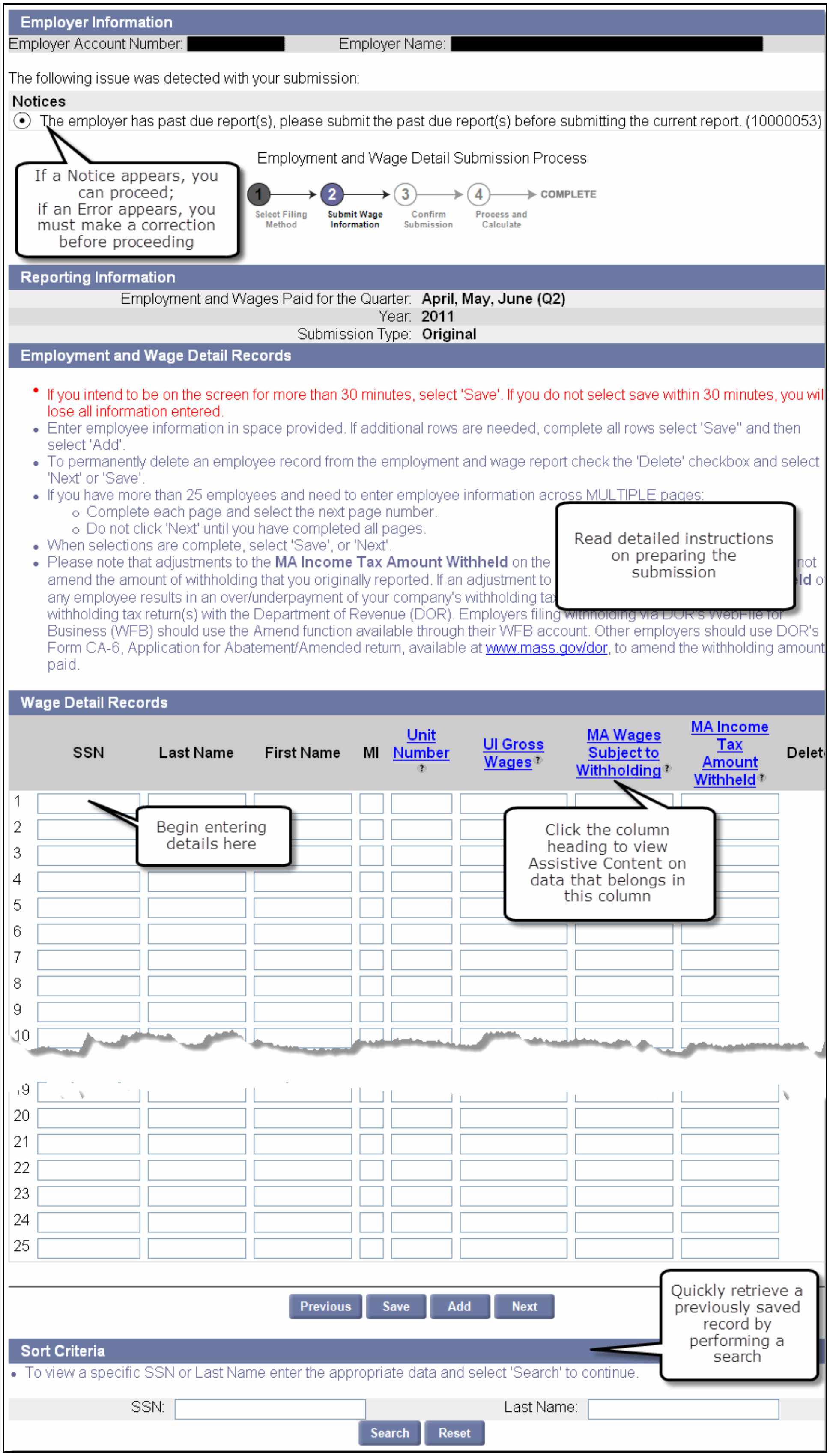
1. Click **Employment and Wage Detail Reporting**.
2. Click **Submit Employment and Wage Detail**. A page appears where you configure the report.



3. Select a **Quarter** and a **Year**. Click the radio button for **Manual Entry**. Click **Next**.
4. The **Wage Detail Records** page appears. Enter the wage detail information. (See the detailed instructions on filling in the wage detail records that appear onscreen.)

   NOTE: The maximum number of records that can be entered using manual entry is 100. The page will initially display 25 blank rows for wage detail entries. Upon reaching 25 records, you can add more records by clicking on **Add** at the end of the page.

   IMPORTANT NOTE: It is strongly recommended that you periodically save the information being entered manually. The system times out after 30 minutes. Unsaved data is lost if a timeout occurs.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

The following issue was detected with your submission:

Notices

The employer has past due report(s), please submit the past due report(s) before submitting the current report. (10000053)

If a Notice appears, you can proceed; if an Error appears, you must make a correction before proceeding

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter:	**April, May, June (Q2)**
Year:	**2011**
Submission Type:	**Original**

Employment and Wage Detail Records

- If you intend to be on the screen for more than 30 minutes, select 'Save'. If you do not select save within 30 minutes, you wil lose all information entered.
- Enter employee information in space provided. If additional rows are needed, complete all rows select 'Save" and then select 'Add'.
- To permanently delete an employee record from the employment and wage report check the 'Delete' checkbox and select 'Next' or 'Save'.
- If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
  - Complete each page and select the next page number.
  - Do not click 'Next' until you have completed all pages.
- When selections are complete, select 'Save', or 'Next'.
- Please note that adjustments to the **MA Income Tax Amount Withheld** on the ... not amend the amount of withholding that you originally reported. If an adjustment to ...ld o any employee results in an over/underpayment of your company's withholding tax ... withholding tax return(s) with the Department of Revenue (DOR). Employers filing ... Business (WFB) should use the Amend function available through their WFB account. Other employers should use DOR's Form CA-6, Application for Abatement/Amended return, available at www.mass.gov/dor, to amend the withholding amount paid.

Read detailed instructions on preparing the submission

Wage Detail Records

	SSN	Last Name	First Name	MI	Unit Number	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Delet
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
19									
20									
21									
22									
23									
24									
25									

Begin entering details here

Click the column heading to view Assistive Content on data that belongs in this column

Previous | Save | Add | Next

Quickly retrieve a previously saved record by performing a search

Sort Criteria

- To view a specific SSN or Last Name enter the appropriate data and select 'Search' to continue.

SSN: Last Name:

Search | Reset

5. Once you have entered all the information, click **Next** to proceed to the next step.

6. The **Employment and Wage Detail Records** page appears. Use the instructions on the page to complete the requested information. (Also see the 'HOURS WORKED GUIDELINE' in the Addendum for additional pointers.) Click **Next**.

   NOTE: Save frequently if you are making numerous data additions or changes, or if you want to leave the page and return in a later session.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **January, February, March (Q1)**
Year: **2011**
Submission Type: **Original**

Employment and Wage Detail Records

- The monthly employment data reported below should be a count of all full-time and part-time workers in covered employment(subject to Massachusett's Unemployment Compensation Law)who performed services during the payroll period which includes the 12th of the month.
  - If an employee was employed in the payroll period based on the definition above, select 'Yes'.
  - If no employment for an employee in the payroll period based on the definition above, select 'No'
- If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
  - Complete each page and select 'Save' before clicking on the next page number.
  - Do not click 'Next' until you have completed and saved all pages.
- When selections are complete, select 'Save', or 'Next'.

	SSN	Last Name	First Name	MI	Unit Number	Employment Month#1	Employment Month#2	Employment Month#3	Hours Worked	Owner/Officer
1	[redacted]	[redacted]	[redacted]		0					No

Previous | Save | Next

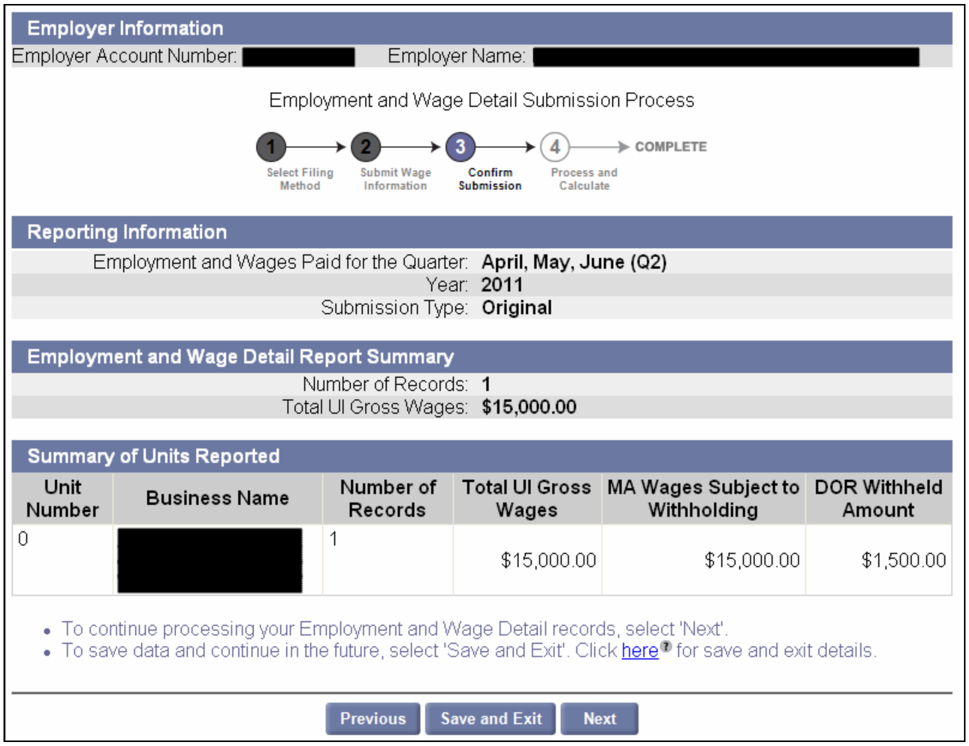
Sort Criteria

- To view a specific SSN or Last Name enter the appropriate data and select 'Search' to continue.

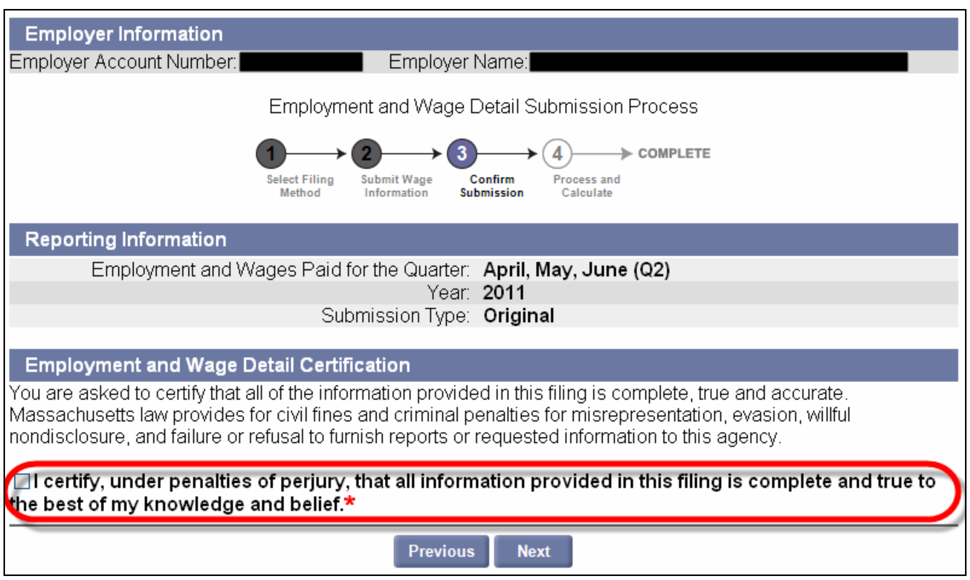
SSN: Last Name:

Search | Reset

7. The **Summary of Units Reported** page displays a summary of the gross wage detail information you entered. The information is tallied at the reporting unit level.

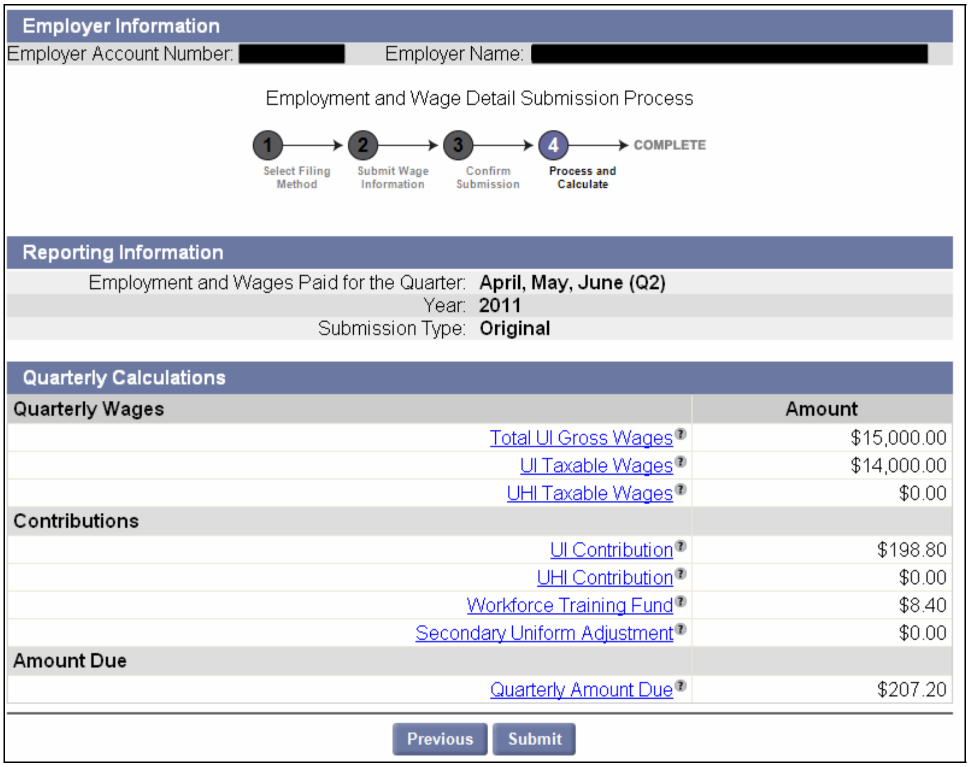


8. A **Certification** page appears. Check the box, and click **Next**.



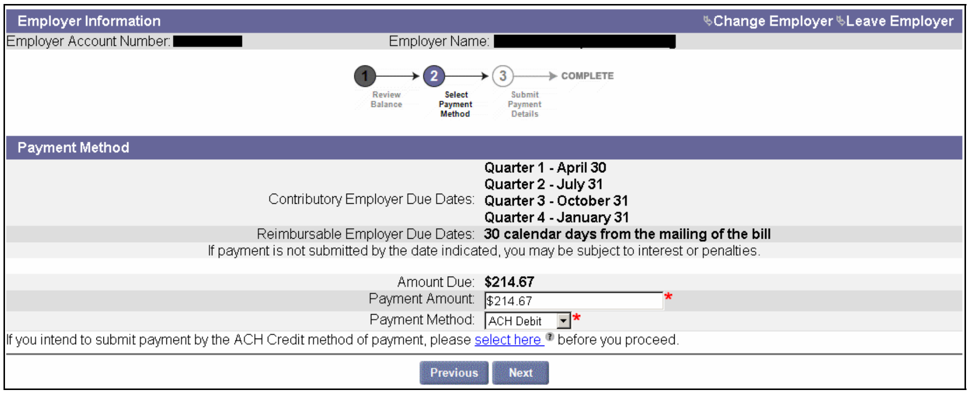
9. A **Quarterly Calculations** page appears, showing calculations and the quarterly contributions due. If you are ready to submit the wage detail report, click **Submit**.

   NOTE: If you need to correct any wage submission details at this point, click **Previous** to return to the **Employment and Wage Detail Records** page where you can edit your entries.



10. The **Employment and Wage Detail Report Submission Confirmation** page appears, indicating that the reporting process has been successful. Click **Make Payment**.

11. The **Payment Method** page appears. Select **Payment Amount** and **Payment Method**.



- If **Check** is selected as the payment method, a voucher displays onscreen. Print copies of the voucher, and send a copy to DUA along with the paper check when you make the payment.
- To use **ACH Credit**, you must have prior approval from DUA. You can click the link below the Payment Method selection for detailed information on seeking DUA approval.
- No prior approval is required for using **ACH Debit**.

NOTE: For more information on making payments, see the section, *Payment Information*.

File Upload Method

There are three file formats that can be used for file upload:

- ICESA,
- EFW2, and
- Delimited

File upload tips

Always use a file upload method when there are more than 100 records in the wage detail.

Upload files may contain fewer than 100 records.

Expect files of 300 records or more to be batch processed. When batch processed, the file upload is scheduled by the system for off-peak hours. Results will not appear onscreen until the processing is complete. You may see the following screen message:

Due to the size of the file Your_file.csv, the employment and wage detail will be processed in an overnight batch. Please check back tomorrow in View Submission History for results (634).

Files with more than 29,999 records must be uploaded using the File Transfer Protocol (FTP). Employers should consult with DUA staff to review file format and FTP a test file.

Preparing ICESA or EFW2 Files

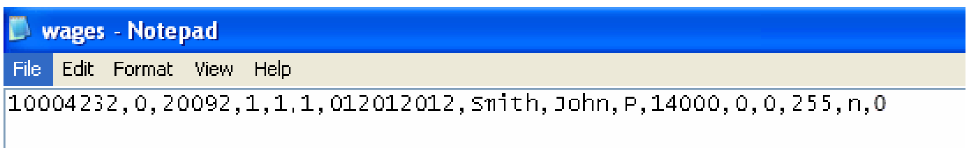
Some accounting packages output employment wage and detail reports in ICESA and EFW2 format. The ICESA file format that works with the QUEST file upload process includes only the “S” records, and has only 275 characters per record with the carriage return at space 275.

The EFW2 file format works only with “RS” records and has only 512 characters per record with the carriage return at space 512.

Preparing Delimited Files

Delimited files can be created and edited using readily available software.

Delimited files should be in a comma delimited text file format. The delimited file should look like the screen shot below (one record shown for a sample). There should be no header row.



The DUA provides a template with these fields. Its fields are formatted so the data uploads correctly. (Search for ‘delimited template’ from the DUA website at http://www.mass.gov/uima to locate the template.)

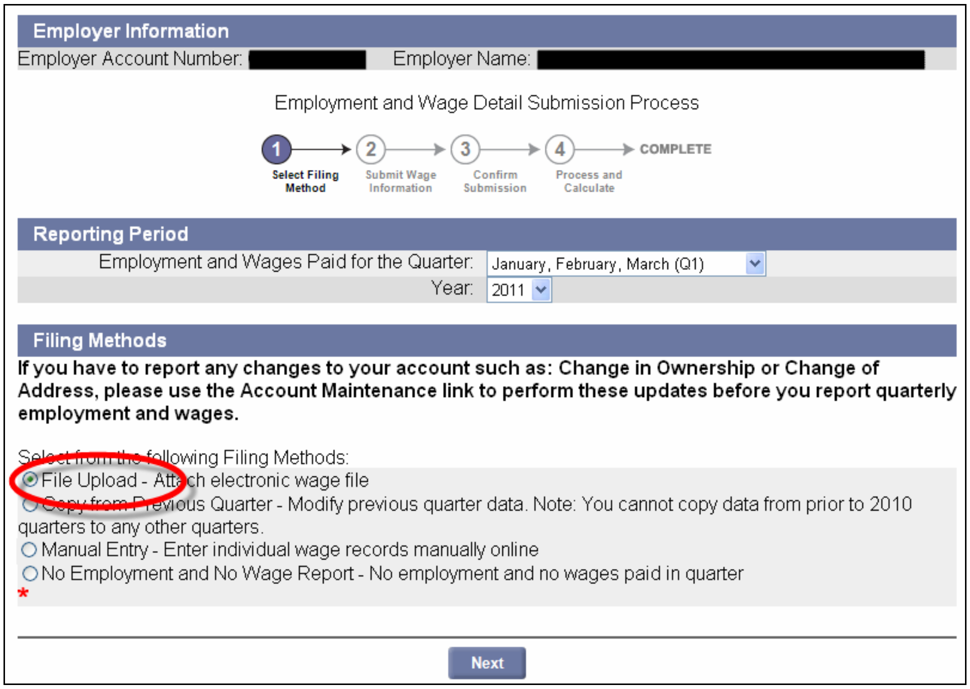
Pointers on using the delimited template

- Do not change any cell ‘Number Format’ in the file.
- Make sure that columns 1, 2, 4, 5, 6, and 15 are formatted as ‘Text.’
- Delete rows 1-4 (i.e., rows with template notes in them, the column headings, and the sample data).
- If using Microsoft Excel, before uploading the file, save it in ‘CSV (Comma delimited)’ format. (Use similar selections with other software packages.)
- If you ever open the saved output file, RESAVE it in ‘CSV (Comma delimited)’ format before uploading it.

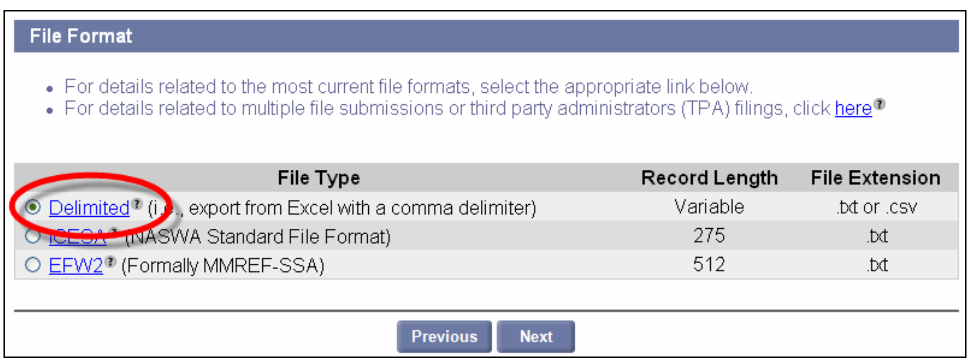
Performing a File Upload

These instructions show a delimited file upload, but they apply as well to ICESA and EFW2 files.

1. Click **Employment and Wage Detail Reporting**.
2. Click **Submit Employment and Wage Detail**.
3. Select a **Quarter** and a **Year**. Click the radio button for **File Upload**. Click **Next**.



4. In the **File Format** area, select a **File Type** (in this example, Delimited). Click **Next**.



5. In the **Select Wage Detail File** area, click **Browse**.

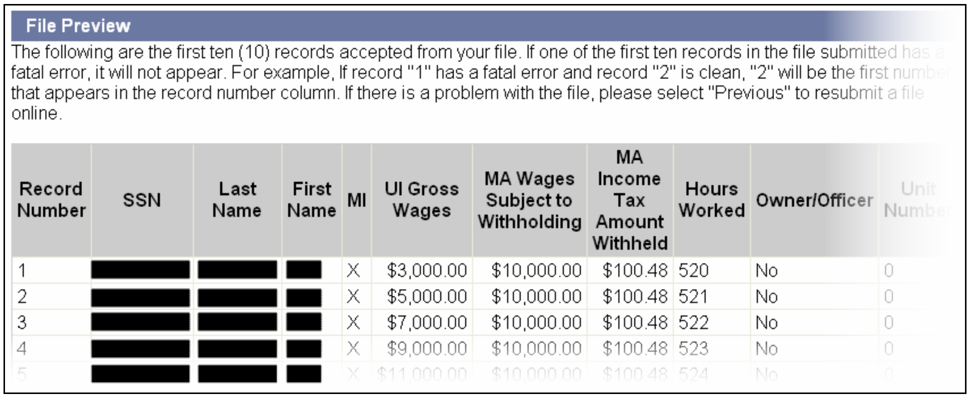
6. In the dialog box, choose a file, and click **Open**.

7. The file name displays in the **Select Wage Detail File** field. Click **Next**.

   NOTE: Typically files with 300 records or more are processed during off-peak hours in a batch. In this case, the following message will appear:

   Due to the size of the file Your_file.csv, the employment and wage detail will be processed in an overnight batch. Please check back tomorrow in View Submission History for results (634).

8. If you uploaded fewer than 300 records, a **File Preview** appears. Review the uploaded information and click **Next**.



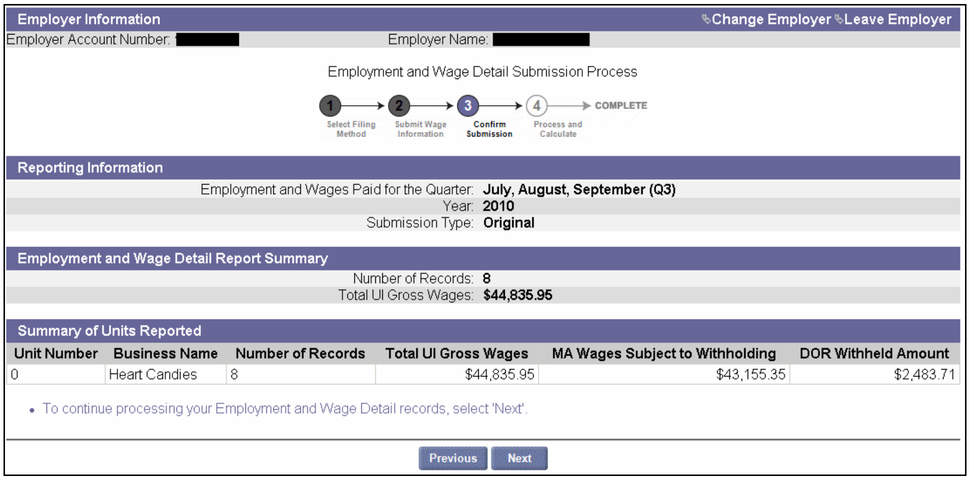
File Preview

The following are the first ten (10) records accepted from your file. If one of the first ten records in the file submitted has a fatal error, it will not appear. For example, If record "1" has a fatal error and record "2" is clean, "2" will be the first number that appears in the record number column. If there is a problem with the file, please select "Previous" to resubmit a file online.

Record Number	SSN	Last Name	First Name	MI	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Hours Worked	Owner/Officer	Unit Numbe
1	[redacted]	[redacted]	[redacted]	X	$3,000.00	$10,000.00	$100.48	520	No	0
2	[redacted]	[redacted]	[redacted]	X	$5,000.00	$10,000.00	$100.48	521	No	0
3	[redacted]	[redacted]	[redacted]	X	$7,000.00	$10,000.00	$100.48	522	No	0
4	[redacted]	[redacted]	[redacted]	X	$9,000.00	$10,000.00	$100.48	523	No	0
5	[redacted]	[redacted]	[redacted]	X	$11,000.00	$10,000.00	$100.48	524	No	0

NOTE: If errors are found in the file, the errors will be displayed. You can either correct the errors or ignore them. If you ignore the errors and a record contains a fatal error (e.g., a missing SSN), the system will reject the specific record. The system will accept records with non-fatal errors (e.g., hours worked missing). See the *Addendum* for a list of error messages, and for troubleshooting information.

9. Review the summary information about the upload and click **Next**.



Employer Information Change Employer Leave Employer

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

Reporting Information

Employment and Wages Paid for the Quarter: **July, August, September (Q3)**
Year: **2010**
Submission Type: **Original**

Employment and Wage Detail Report Summary

Number of Records: **8**
Total UI Gross Wages: **$44,835.95**

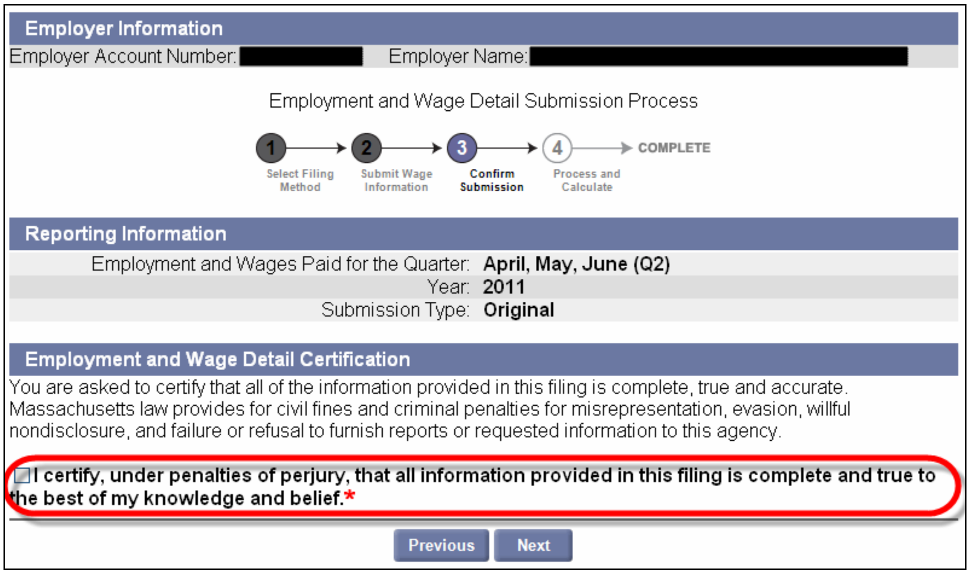
Summary of Units Reported

Unit Number	Business Name	Number of Records	Total UI Gross Wages	MA Wages Subject to Withholding	DOR Withheld Amount
0	Heart Candies	8	$44,835.95	$43,155.35	$2,483.71

- To continue processing your Employment and Wage Detail records, select 'Next'.

Previous Next

10. The **Employment and Wage Detail Certification** page appears. Check the box and click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 **Confirm Submission** → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter:	**April, May, June (Q2)**
Year:	**2011**
Submission Type:	**Original**

Employment and Wage Detail Certification

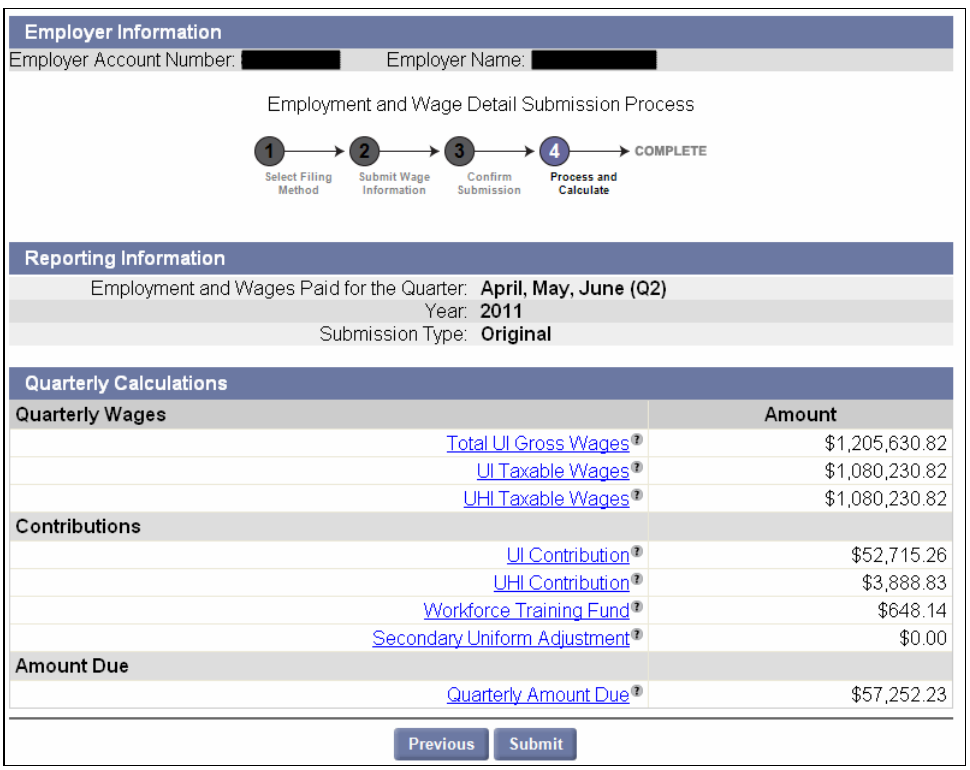
You are asked to certify that all of the information provided in this filing is complete, true and accurate. Massachusetts law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this agency.

☐ **I certify, under penalties of perjury, that all information provided in this filing is complete and true to the best of my knowledge and belief.***

Previous Next

11. Review the Quarterly Calculations and Amount Due.

IMPORTANT NOTE: If the uploaded data is incorrect, the file can be corrected and uploaded again without having to perform an Adjustment as long as you **do not click Submit** at this point. See *Performing a Merge or Overwrite*.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 **Process and Calculate** → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter:	**April, May, June (Q2)**
Year:	**2011**
Submission Type:	**Original**

Quarterly Calculations

Quarterly Wages	**Amount**
Total UI Gross Wages	$1,205,630.82
UI Taxable Wages	$1,080,230.82
UHI Taxable Wages	$1,080,230.82
Contributions	
UI Contribution	$52,715.26
UHI Contribution	$3,888.83
Workforce Training Fund	$648.14
Secondary Uniform Adjustment	$0.00
Amount Due	
Quarterly Amount Due	$57,252.23

Previous Submit

12. When you are satisfied that the data is correct, click **Submit**.

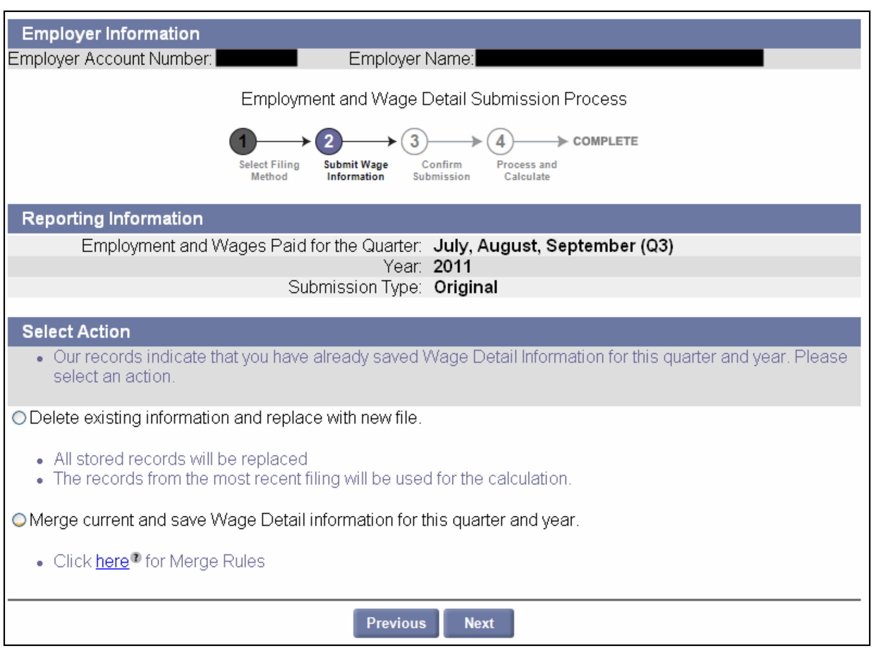
13. If the file upload is successful, the **Employment and Wage Detail Report Submission Confirmation** page appears. If desired, click **Make Payment**.

    NOTE: For more information on making payments, see the section, *Payment Information*.

Performing a Merge or Override

If at the point of submitting Employment Wage and Detail information via file upload, you realize that the data is incorrect, you can upload the data again without performing an Adjustment.

1. Do NOT click **Submit**.
2. Correct the file.
3. Click **Previous** on successive pages until you have returned to the **Browse for File** page.
4. Select the corrected file and click **Next** until you reach the **Select Action** page.



5. Select to either **delete** the records or **merge** them and click **Next** to continue with the upload. (See below for Merge Rules.)

Employer Merge Rules

Wage Detail Merge Rules:

When requested to merge, the System will merge distinct employee records at the unit level.

If an employee(s) exist within the same reporting unit while merging data for the same reporting unit the System will overwrite the previous employee data with the employee data from the latest filing. Please note: employee level merge (replace/add) has no ability to delete employees.

For example:

Employer user Jane saves an employment and wage detail file with the following reporting units:

- 0001
- 0003
- 0005
- 0007
- 0009

Employer user Bill follows Jane and uploads the following reporting units:

- 0000
- 0002
- 0004
- 0005
- 0006
- 0008
- 0009
- 0010

Jane and Bill have submitted two common units, 0005 and 0009. The System will keep Jane's units 0001, 0003, and 0007. The System will merge Jane's units 0005 and 0009 with Bill's 0005 and 0009 at the employee level. If the same employee(s) exist within unit 0005 and 0009 for both Jane and Bill's files, then the System will use the records from Bill's seeing that it is the latest filing.

The final submission will include the following units for calculation:

- 0000 (from Bill)
- 0001 (from Jane)
- 0002 (from Bill)
- 0003 (from Jane)
- 0004 (from Bill
- 0005 (from Bill)
- 0006 (from Bill)
- 0007 (from Jane)
- 0008 (from Bill)
- 0009 (from Bill)
- 0010 (from Bill)

If the employer does not report using units and Employee A is in both files, (File 1 being uploaded first and file 2 being uploaded subsequently), the System will overwrite the Employee A record from file 1 with the Employee A record from file 2.

If employees A, B, D, and E are in File 1; and C, F, G, H are in file 2; submit A, B, C, D, E, F, G, and H.

If A, B, and D are in File 1 and B, C, and E are in File 2. Submit A and D from file 1 and B, C and E from file 2.

Close

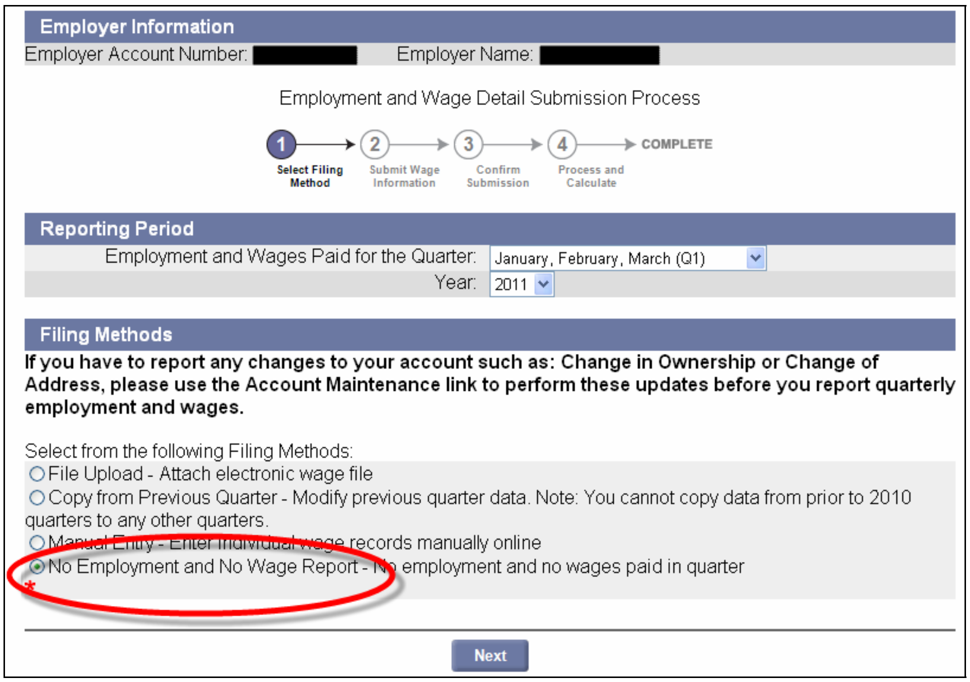
No Employment and No Wage Report

The **No Employment and No Wage Report** option can be used by Employers if they have no employees and no wages to report for a quarter.

NOTE: This filing method should not be used if the Employer **had employees** under employ who did not earn any wages during the quarter. In such cases, this information must be reported via one of the other filing methods, entering employee information with 0 wage information.

To file a No Employment and No Wage Report, perform these steps:

1. Follow the first 2 steps in *Manual Entry Method*.
2. Select **No Employment and No Wage Report** and click **Next**.



3. The **Section Header** page appears. Click **Submit**.

4. A **Confirmation** page appears.

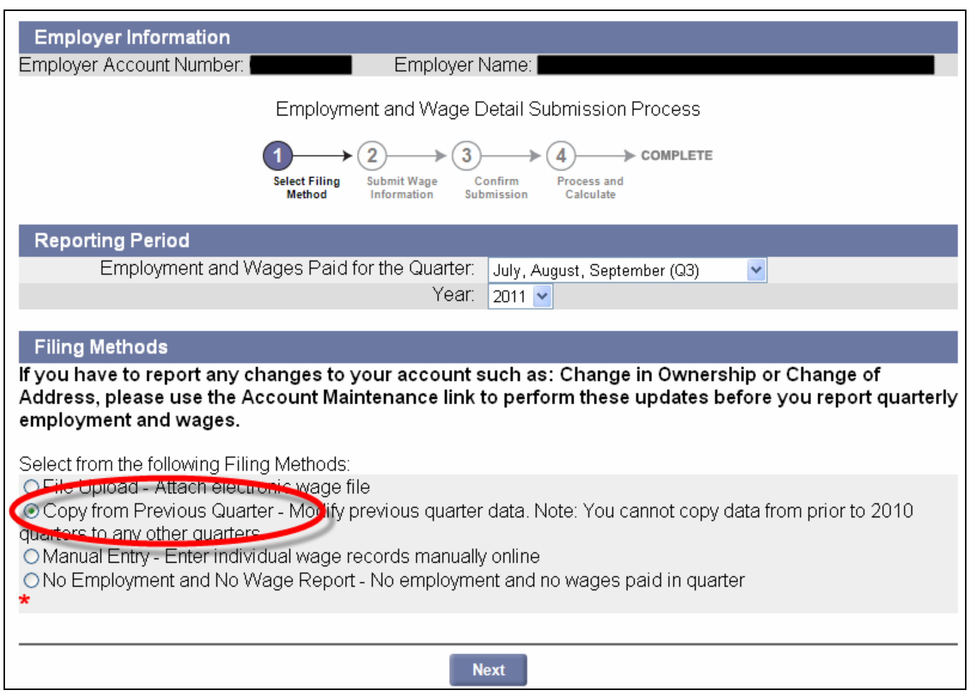
Copy from Previous Quarter

When this method is used, the employee details from a past quarter in calendar year 2010 or later (as specified by the user) are copied into the quarter for which you are filing, reducing the data entry time.

NOTE: Only the employee names and SSNs will be copied from the previous quarter. The wage data from each employee record will not be copied.

1. Click **Employment and Wage Detail Reporting**.

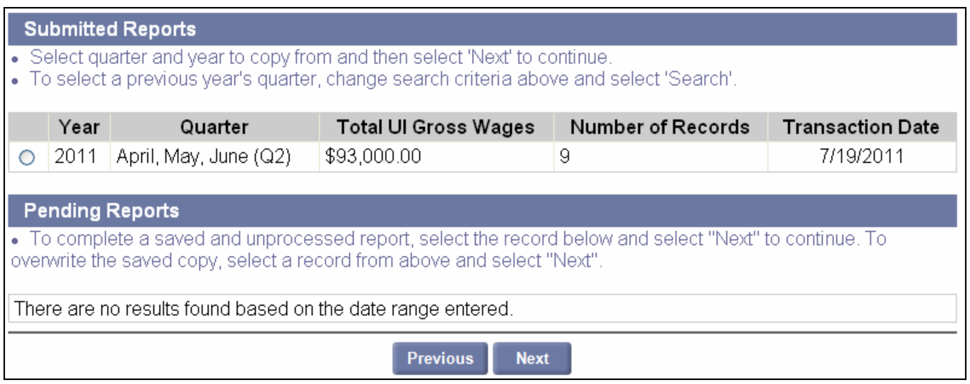
2. Click **Submit Employment and Wage Detail**. A page appears where you configure the report.



3. Select a **Quarter** and a **Year**. Click the radio button for **Copy from Previous Quarter**. Click **Next**.

4. The **Prior Quarter Search** page appears. Select the year and the quarter to copy from and click **Search**.

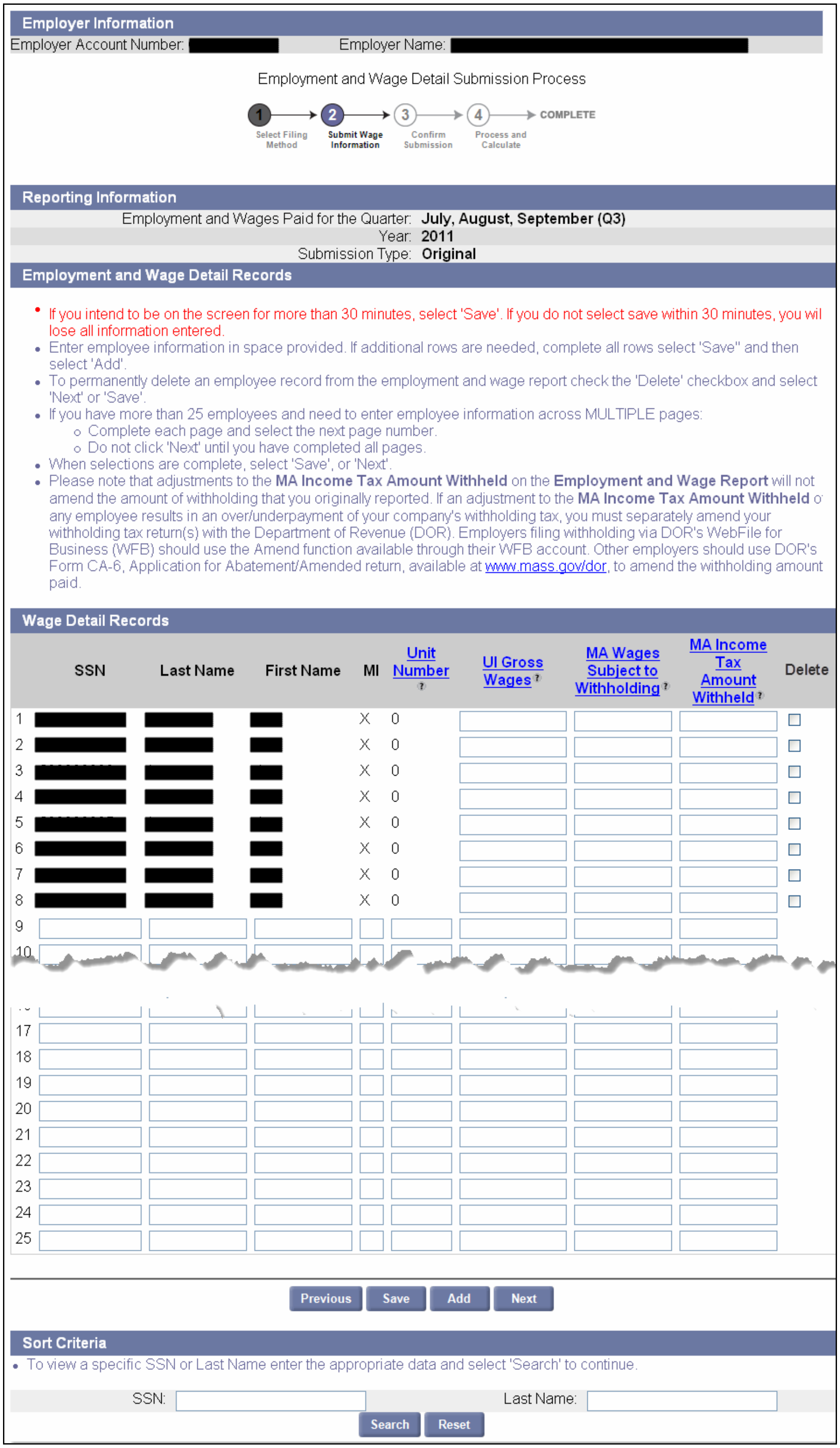
5. The quarter you specified appears below the search grid in the **Submitted Reports** area. Select the radio button for the quarter and click **Next**.



6. The page shown in the next page will appear. Only the name and SSN of the employee from the previous quarter are copied. Add wage information in the **Wage Detail Records** area. In addition:

   - If you use the **Copy from Previous Filing** method and you have entered the wage information but have not clicked on **Save** and **Next** to complete the filing, the only way to get back to the pending filing is to select **Manual Entry**. Then you can continue with the initial submission.
   - If you use the **Copy from Previous Filing** method you must fill in every field of every copied Employee for anything on the page to be saved. You must also fill in every field of any new record for anything on the page to be saved. **The system cannot save employee records with blank wage information.**
   - If you are deleting a record, check off the delete box and enter "0" for each wage field.

7. Once you have modified all the information as necessary, click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **July, August, September (Q3)**
Year: **2011**
Submission Type: **Original**

Employment and Wage Detail Records

- If you intend to be on the screen for more than 30 minutes, select 'Save'. If you do not select save within 30 minutes, you wil lose all information entered.
- Enter employee information in space provided. If additional rows are needed, complete all rows select 'Save'' and then select 'Add'.
- To permanently delete an employee record from the employment and wage report check the 'Delete' checkbox and select 'Next' or 'Save'.
- If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
  - Complete each page and select the next page number.
  - Do not click 'Next' until you have completed all pages.
- When selections are complete, select 'Save', or 'Next'.
- Please note that adjustments to the **MA Income Tax Amount Withheld** on the **Employment and Wage Report** will not amend the amount of withholding that you originally reported. If an adjustment to the **MA Income Tax Amount Withheld** o any employee results in an over/underpayment of your company's withholding tax, you must separately amend your withholding tax return(s) with the Department of Revenue (DOR). Employers filing withholding via DOR's WebFile for Business (WFB) should use the Amend function available through their WFB account. Other employers should use DOR's Form CA-6, Application for Abatement/Amended return, available at www.mass.gov/dor, to amend the withholding amount paid.

Wage Detail Records

	SSN	Last Name	First Name	MI	Unit Number	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Delete
1	[redacted]	[redacted]	[redacted]	X	0				☐
2	[redacted]	[redacted]	[redacted]	X	0				☐
3	[redacted]	[redacted]	[redacted]	X	0				☐
4	[redacted]	[redacted]	[redacted]	X	0				☐
5	[redacted]	[redacted]	[redacted]	X	0				☐
6	[redacted]	[redacted]	[redacted]	X	0				☐
7	[redacted]	[redacted]	[redacted]	X	0				☐
8	[redacted]	[redacted]	[redacted]	X	0				☐
9									
10									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Previous | Save | Add | Next

Sort Criteria

- To view a specific SSN or Last Name enter the appropriate data and select 'Search' to continue.

SSN: Last Name:

Search | Reset

8. From here on, the process is the same as the manual entry filing method. If required, refer to **Step 6** of the instructions for manual entry and continue to read from there.

VIEW EMPLOYMENT AND WAGE DETAIL HISTORY

This function allows you to view previously submitted employment and/or wage detail records for all quarters in a year or by individual quarters. You have the option to view original submissions and/or adjustments. You can also limit your search to a specific record by name/SSN. Additionally, the search can be limited to specific reporting units.

1. Click **Employment and Wage Detail Reporting**.

2. Click **View Employment and Wage Detail History**. The following page appears.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail History Search

Submission Type:	All
SSN:	
Last Name:	
First Name:	
Year:	2010
Quarter:	All
Unit Number:	
Detail Type:	UI Wages

Search Reset

3. Select a **Submission Type**, **Year**, **Quarter**, and **Detail Type**. Enter specific search criteria or leave blank to retrieve all records.

4. Click **Search**. The search results will appear as shown in the following examples. (Click **Reset** to clear the search results and the search criteria.)

Example 1: Search Results for Detail Type **UI Wages**.

Search Results

Transaction Date	Submission Type	Qtr	SSN	Last Name	First Name	MI	Unit	UI Gross Wages	UI Taxable Wages	UHI Taxable Wages
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	M	0	$730.00	$730.00	$730.00
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	P	0	$18,403.36	$0.00	$0.00
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	$18,705.26	$0.00	$0.00
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	$4,471.00	$1,818.15	$1,818.15
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	J	0	$5,200.00	$0.00	$0.00

Download Wage Details

Example 2: Search Results for Detail Type **DOR Wages**.

Search Results

Transaction Date	Submission Type	Qtr	SSN	Last Name	First Name	MI	Unit	MA Wages Subject to Withholding	MA Income Tax Amount Withheld
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	M	0	$730.00	$30.36
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	P	0	$18,403.36	$551.20
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	$18,705.26	$551.20
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	$4,471.00	$202.93
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	J	0	$5,200.00	$254.54

Download Wage Details

Example 3: Search Results for Detail Type **Employment**

Search Results

Transaction Date	Submission Type	Qtr	SSN	Last Name	First Name	MI	Unit	Month 1	Month 2	Month 3
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	M	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	P	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	J	0	Y	Y	Y

Download Wage Details

5. Click **Reset** to clear the search results and the search criteria.

   NOTE: The display is limited to the first 100 records. If you have more than 100 records, you can download them to a file on your computer using the steps in the next section.

Download Employment and Wage Detail History

This function allows you to download Employment and Wage Details retrieved in a search.

1. Perform the steps in: *View Employment and Wage Detail History*.
2. Click the **Download Wage Detail** link on the search results page.

Search Results

Transaction Date	Submission Type	Qtr	SSN	Last Name	First Name	MI	Unit	Month 1	Month 2	Month 3
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	M	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	P	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	R	0	Y	Y	Y
1/13/2011	Original	4	[redacted]	[redacted]	[redacted]	J	0	Y	Y	Y

Download Wage Details

3. Follow the onscreen download instructions.

VIEW EMPLOYMENT AND WAGE DETAIL CALCULATION HISTORY

This function allows you to view the calculations for contributions due for previously submitted employment and wage detail reports. This data is available for each quarter and is viewable by year. The calculations do not factor in payments applied. To view payment history, refer to the section on *Payment Information*.

1. Click **Employment and Wage Detail Reporting**.
2. Click **View Employment and Wage Detail Calculation History**. The following page will appear. Enter the year for which you wish to view calculation history and click **Search**.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Quarterly Calculations Search

Year: 2011

Search Reset

3. The search results will appear as shown below.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Quarterly Calculations Search

Year: 2010

Search Reset

Quarterly Calculations

This screen provides a historical view of quarterly employment and wage calculations. The calculations below do not factor in payments applied. To view payment history select the "Payment Information" link on the left hand navigation.

Quarterly Wages	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Total UI Gross Wages	$40,817.00	$44,624.21	$46,144.39	$60,815.21	$192,400.81
UI Taxable Wages	$40,817.00	$32,624.21	$15,519.43	$8,339.74	$97,300.38
UHI Taxable Wages	$40,817.00	$32,624.21	$15,519.43	$8,339.74	$97,300.38
Contributions					
UI Contribution	$514.29	$411.07	$195.54	$105.08	$1,225.98
UHI Contribution	$97.96	$78.30	$37.25	$20.02	$233.53
Workforce Training Fund	$24.49	$19.57	$9.31	$5.00	$58.37
Secondary Uniform Adjustment	$0.00	$0.00	$0.00	$0.00	$0.00
Amount Due					
Quarterly Amount Due	$636.74	$508.94	$242.10	$130.10	$1,517.88

VIEW SUBMISSION HISTORY

This function allows you to view the submission history for employment and wage detail records. You can filter search results by: Submission Type (Original/Adjustment), Quarter, Year, or Detail Type (UI Wages, DOR Wages, or Employment).

1. Click **Employment and Wage Detail Reporting**.
2. Click **View Submission History**.
3. The **Employment and Wage Detail Submission History Search** page appears. Enter your search criteria and click on **Search**.

Employer Information	
Employer Account Number: [redacted]	Employer Name: [redacted]

Employment and Wage Detail Submission History Search	
Submission Type:	All
Quarter:	All
Year:	2011
Detail Type:	UI Wages

Search Reset

The search results display below the search grid.

Example: Search results for Detail Type: **UI Wages**.

Search Results

Date	Year	Qtr	Type	Filing Method	Confirmation Number	Records	Total UI Gross Wages	Status	Record Errors	Submitter
1/13/2011	2010	4	Original	File Upload	0[redacted]1_ 011311101514	9	$60,815.21	Submitted		[redacted]
10/18/2010	2010	3	Original	Manual Entry	0[redacted]1_ 101810152136	9	$46,144.39	Submitted		[redacted]
7/20/2010	2010	2	Original	Manual Entry	0[redacted]1_ 072010100758	9	$44,624.21	Submitted		[redacted]
4/12/2010	2010	1	Original	Manual Entry	0[redacted]1_ 041210183232	8	$40,816.31	Submitted		[redacted]

4. If you searched by **UI Wages**, click a **Confirmation Number** to display Quarterly Calculations for that filing.
5. The **Quarterly Calculations** page appears.

Quarterly Calculations

QuarterlyWages	Amount
Total UI Gross Wages	$40,816.31
UI Taxable Wages	$40,816.31
UHI Taxable Wages	$40,816.31
Contributions	
UI Contribution	$514.29
UHI Contribution	$97.96
Workforce Training Fund	$24.49
Secondary Uniform Adjustment	$0.00
Amount Due	
Quarterly Amount Due	$636.74

Previous

ADJUSTMENTS

Introduction

This section describes how to adjust previously submitted employment and wage detail records. The adjustment function allows the user to modify/add/delete records as many times as required. There are 2 methods available to perform adjustments: **Upload a file** of adjustments, or select and **modify specific records online**. All completed adjustments can be viewed in employment and wage detail history. In some cases, an Employer-submitted adjustment may require staff review. A workflow item will be initiated and staff will approve or deny the adjustment, based on their review.

IMPORTANT NOTE: This link applies to adjustments to reports filed for Q1 2010 and forward. For instructions on adjusting reports filed for earlier quarters, see the section, *Submit Employment and Wage Detail for Quarters Prior to 2010*.

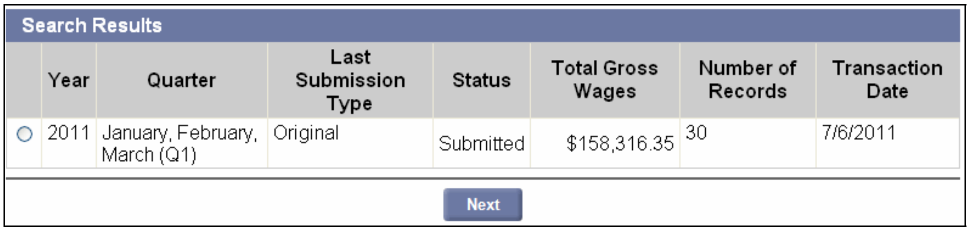
The reasons that an Employment and Wage Detail Report can be adjusted are as follows:

- Employment adjusted
- Employment and Wages adjusted because the workers performed services for a different business
- Employment and Wages adjusted because they were not taxable
- Employment and Wages adjusted because they were reported to the wrong state
- Employment and Wages adjusted for a non subject Employer
- Employment and Wages adjusted to correct computer system, data entry or accounting errors
- Other
- Wages adjusted because worker(s) were hired/terminated
- Name change
- SSN change

Manual Entry Method for Adjustments

1. Click **Employment and Wage Detail Reporting**.
2. Click **Adjustments**. The following page will appear. Select the prior quarter that needs an adjustment of wage details using the dropdown menu. Click **Search**.

3. The **Search Results** appear below the search grid. Select the quarter of your choice and click **Next**.

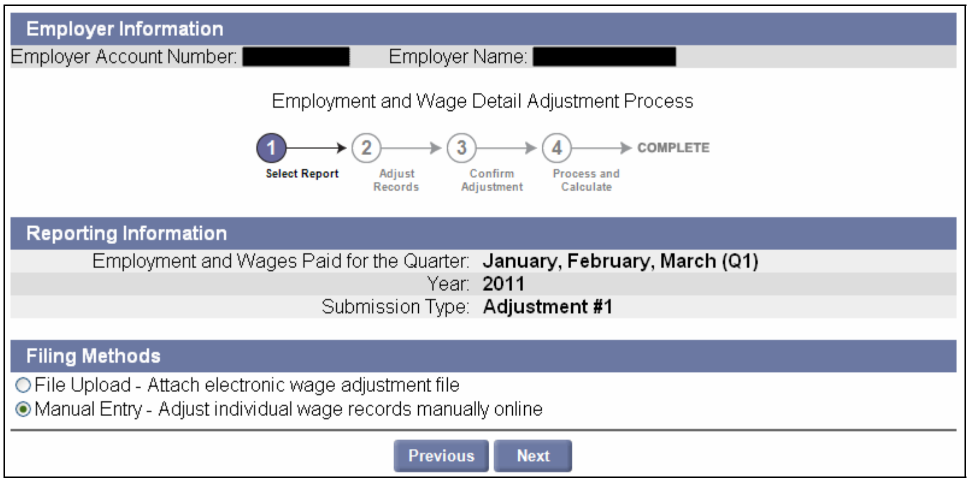


Search Results

	Year	Quarter	Last Submission Type	Status	Total Gross Wages	Number of Records	Transaction Date
○	2011	January, February, March (Q1)	Original	Submitted	$158,316.35	30	7/6/2011

Next

4. The **Filing Method** page appears. Select **Manual Entry** and click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Adjustment Process

1 Select Report → 2 Adjust Records → 3 Confirm Adjustment → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **January, February, March (Q1)**
Year: **2011**
Submission Type: **Adjustment #1**

Filing Methods

○ File Upload - Attach electronic wage adjustment file
◉ Manual Entry - Adjust individual wage records manually online

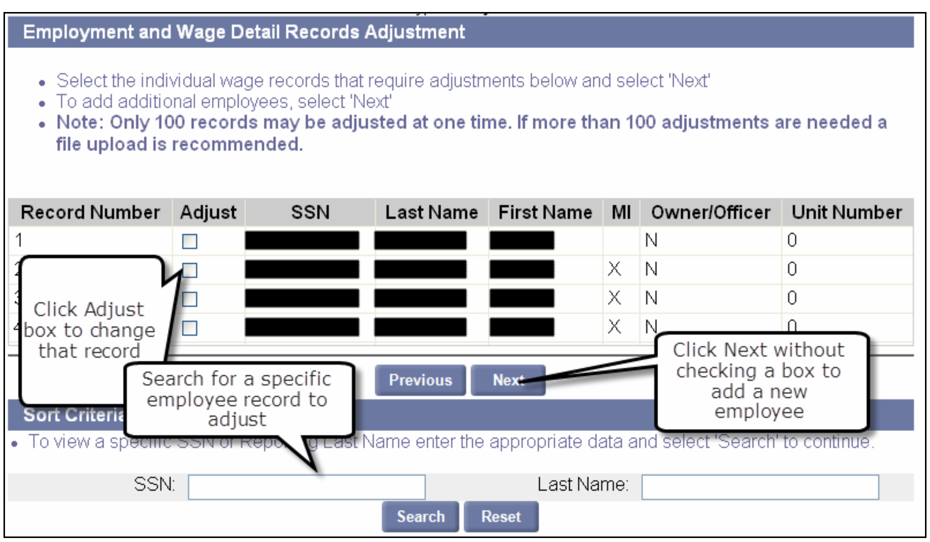
Previous Next

NOTE: If you have to adjust more than 100 records, the file upload method should be used.

5. The **Employment and Wage Detail Records Adjustment** page appears. Do one of the following:

- Click the **Adjust** box for a record requiring adjustment. (See onscreen instructions for details).
- Click **New** if you have no other adjustments to make and wish to add a new employee.

Then click **Next**.



Employment and Wage Detail Records Adjustment

- Select the individual wage records that require adjustments below and select 'Next'
- To add additional employees, select 'Next'
- **Note: Only 100 records may be adjusted at one time. If more than 100 adjustments are needed a file upload is recommended.**

Record Number	Adjust	SSN	Last Name	First Name	MI	Owner/Officer	Unit Number
1	☐	[redacted]	[redacted]	[redacted]		N	0
2	☐	[redacted]	[redacted]	[redacted]	X	N	0
3	☐	[redacted]	[redacted]	[redacted]	X	N	0
4	☐	[redacted]	[redacted]	[redacted]	X	N	0

Previous Next

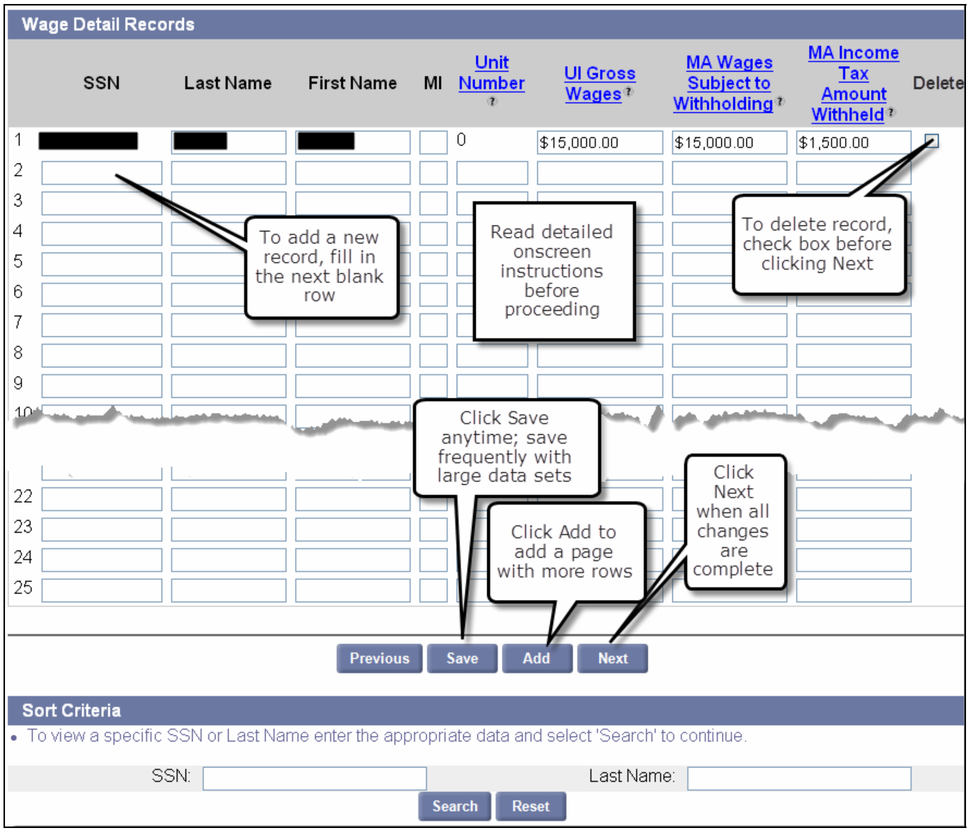
Sort Criteria

- To view a specific SSN or Reporting Last Name enter the appropriate data and select 'Search' to continue.

SSN: Last Name:

Search Reset

6. The **Wage Detail Records** page appears. Modify the wages details for each record that requires adjustment. Add or delete new employees. When all modifications are complete, click **Next**.



NOTE: Last Name, First Name, and Middle Initial are adjustable fields. If you need to correct the **SSN**, check the delete box, enter "0" wages, and, on the next row, enter the correct employee record and wage information.

7. You will be asked to provide information on 12th of the month employment data for each wage detail record on the next page. Upon completion, click **Next** to continue.

NOTE: If required, please refer to the 'HOURS WORKED GUIDELINE' in the Addendum.

8. The **Adjustment Confirmation Summary** page appears with the adjustment information. Review the page and click **Next**.

Adjustment Confirmation Summary

- Compare the previous Employment and Wage Detail Record with the adjusted records and/or verify new or deleted employee(s).
- If the adjustment is correct select 'Next' to continue. If not select 'Previous' to correct.

Employee Adjustment

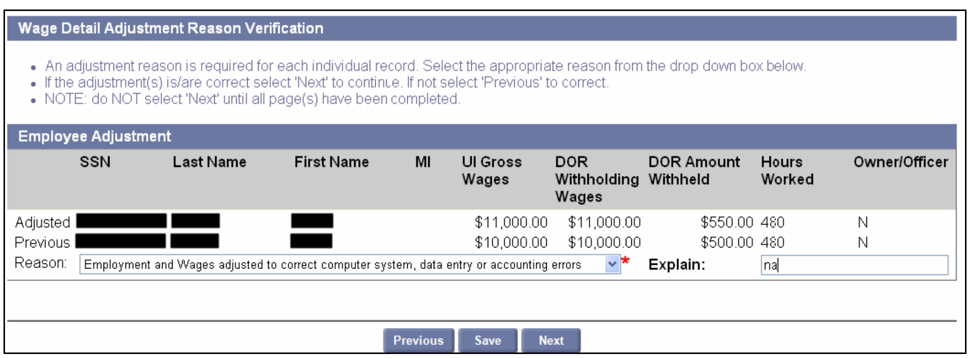
	SSN	Last Name	First Name	MI	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Month 1	Month 2	Month 3	Hours Worked	Owner/ Officer
Adjusted	[redacted]	[redacted]	[redacted]		$13,000.00	$13,000.00	$1,500.00	Y	Y	Y	450	N
Previous	[redacted]	[redacted]	[redacted]		$15,000.00	$15,000.00	$1,500.00	Y	Y	Y	450	N

- To continue processing your wage detail records, select 'Next'.

Previous Next

9. The **Wage Detail Adjustment Reason Verification** page appears. Select a reason for each adjustment. Click **Save** at any time. Click **Next** to continue to the next page.

NOTE: Save frequently if you are making numerous data additions or changes.



Wage Detail Adjustment Reason Verification

- An adjustment reason is required for each individual record. Select the appropriate reason from the drop down box below.
- If the adjustment(s) is/are correct select 'Next' to continue. If not select 'Previous' to correct.
- NOTE: do NOT select 'Next' until all page(s) have been completed.

Employee Adjustment

	SSN	Last Name	First Name	MI	UI Gross Wages	DOR Withholding Wages	DOR Amount Withheld	Hours Worked	Owner/Officer
Adjusted	[redacted]	[redacted]	[redacted]		$11,000.00	$11,000.00	$550.00	480	N
Previous	[redacted]	[redacted]	[redacted]		$10,000.00	$10,000.00	$500.00	480	N

Reason: Employment and Wages adjusted to correct computer system, data entry or accounting errors * **Explain:** na

Previous Save Next

10. The following page will appear displaying the recalculated contributions due after the adjustment. Click **Submit** to complete the wage details adjustment.

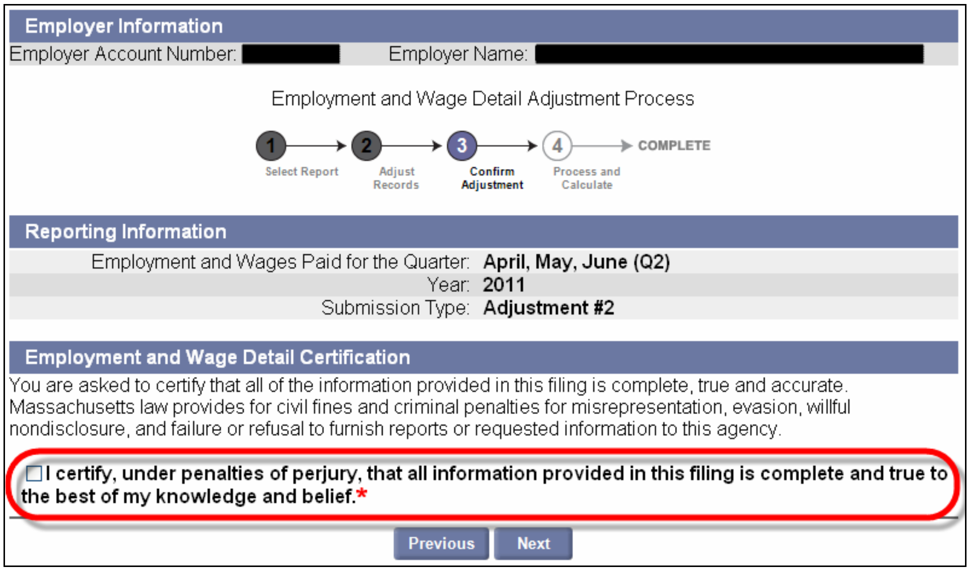
Employment and Wage Detail Adjustment Calculations

- The table below illustrates the adjustment's total affect by quarter
- Each line lists the most recently submitted amount, the adjusted submission amount and the difference
- IMPORTANT NOTE: The adjustment process recalculates the quarter adjusted and any subsequent quarters
- Calculations DO NOT include records pending UI staff review. These will be included in a new account statement

	Submission Type	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Amount
Quarterly Wages						
Total UI Gross Wages	Submitted	$0.00	$95,000.00			$95,000.00
	Adjusted	$0.00	$93,000.00			$93,000.00
	Difference	$0.00	($2,000.00)			($2,000.00)
UI Taxable Wages	Submitted	$0.00	$90,000.00			$90,000.00
	Adjusted	$0.00	$89,000.00			$89,000.00
	Difference	$0.00	($1,000.00)			($1,000.00)
UHI Taxable Wages	Submitted	$0.00	$90,000.00			$90,000.00
	Adjusted	$0.00	$89,000.00			$89,000.00
	Difference	$0.00	($1,000.00)			($1,000.00)
Contributions						
UI Contribution	Submitted	$0.00	$1,278.00			$1,278.00
	Adjusted	$0.00	$1,263.80			$1,263.80
	Difference	$0.00	($14.20)			($14.20)
UHI Contribution	Submitted	$0.00	$0.00			$0.00
	Adjusted	$0.00	$0.00			$0.00
	Difference	$0.00	$0.00			$0.00
Workforce Training Fund	Submitted	$0.00	$54.00			$54.00
	Adjusted	$0.00	$53.40			$53.40
	Difference	$0.00	($0.60)			($0.60)
Secondary Uniform Adjustment	Submitted	$0.00	$0.00			$0.00
	Adjusted	$0.00	$0.00			$0.00
	Difference	$0.00	$0.00			$0.00
Amount Due						
Quarterly Amount Due	Submitted	$0.00	$1,332.00			$1,332.00
	Adjusted	$0.00	$1,317.20			$1,317.20
	Difference	$0.00	($14.80)			($14.80)

Previous Submit

11. A **Certification** page appears. Check the box and click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Adjustment Process

1 Select Report → 2 Adjust Records → 3 Confirm Adjustment → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **April, May, June (Q2)**
Year: **2011**
Submission Type: **Adjustment #2**

Employment and Wage Detail Certification

You are asked to certify that all of the information provided in this filing is complete, true and accurate. Massachusetts law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this agency.

☐ **I certify, under penalties of perjury, that all information provided in this filing is complete and true to the best of my knowledge and belief.***

Previous Next

12. A **Confirmation** page appears, indicating that the process is complete. A confirmation number appears on the page.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Adjustment Process

1 Select Report → 2 Adjust Records → 3 Confirm Adjustment → 4 Process and Calculate → COMPLETE

Employment and Wage Detail Report Adjustment Confirmation

- Thank you for using our online Employment and Wage Detail Adjustment process. You have successfully adjusted an Employment and Wage Detail Report for Quarter April, May, June (Q2) of Year 2011.
- Your confirmation number is : 090[redacted]_07191109551. For future reference, this number is in View Submission History.
- If you would like to make a payment for amounts due select 'Make Payment' at the bottom of this page.
- If you are closing your business and this is your final Employment and Wage Detail Report Select 'Account Maintenance' then 'Suspend Account' from the left navigation and proceed with the prompts.

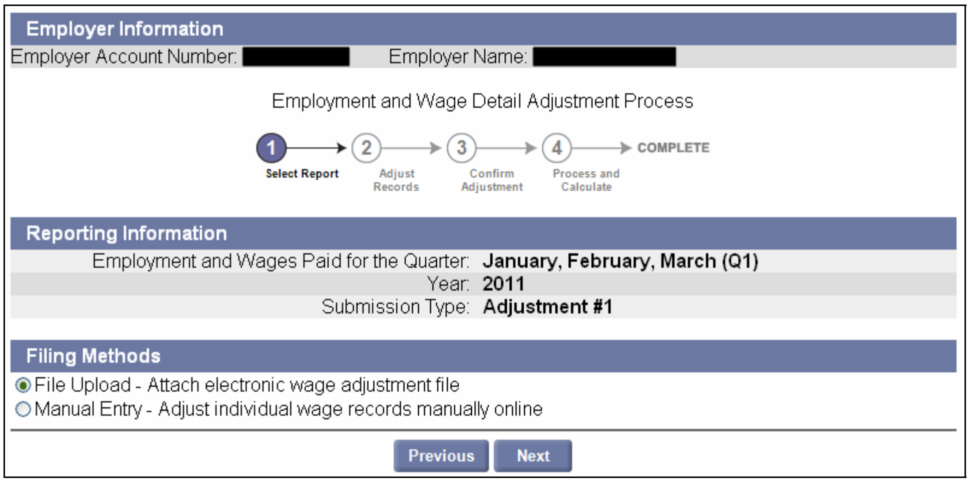
Make Payment

File Upload Method for Adjustments

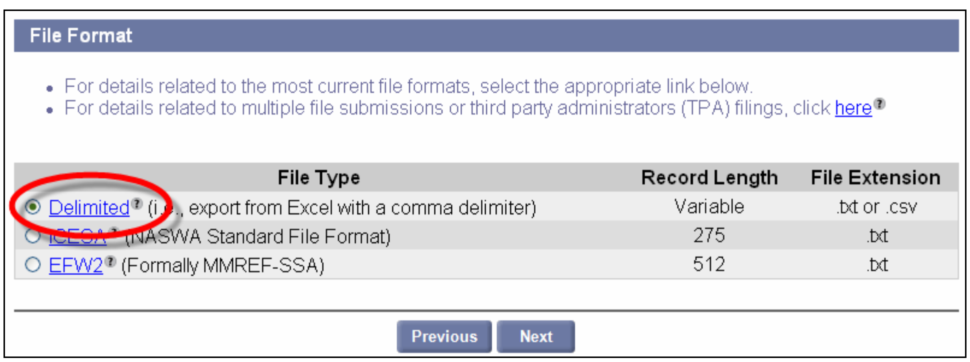
The file upload method should be used whenever there are more than 100 records to adjust. Using the file upload method, 3 options are available: ICESA, EFW2 and Delimited. This section describes the process for uploading a Delimited file, but the procedure is identical for ICESA and EFW2. For details on file formats, see the *Addendum*.

1. Follow the first 3 steps in the section, *Manual Entry Method for Adjustments*.

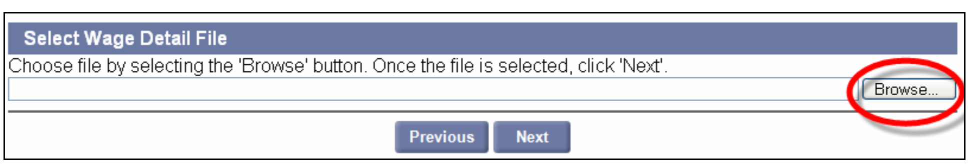
2. Choose **File Upload** as your method of adjustment. Click **Next**.



3. The **File Format** page appears. Select **Delimited** and click **Next**.



4. In the **Select Wage Detail File** area, click **Browse**.



5. In the dialog box, choose a file, and click **Open**.

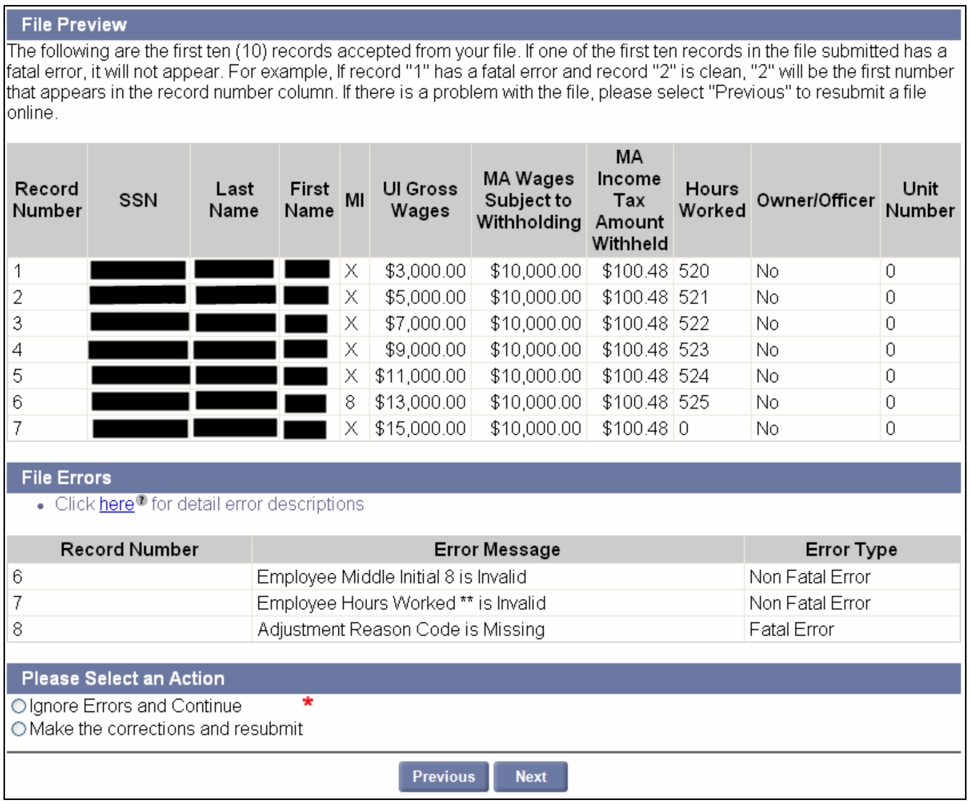
6. The file name displays in the **Select Wage Detail File** field. Click **Next**.

7. In the **File Preview** area, preview the uploaded information and click **Next**.

   NOTE: Typically files with 300 or more records are processed during off-peak hours in a batch. In this case, the following message will appear:

   *Due to the size of the file **Your_file.csv**, the employment and wage detail will be processed in an overnight batch. Please check back tomorrow in View Submission History for results (634).*

   NOTE: If errors are found in the file, the errors will be displayed. You can either correct the errors or ignore them. If you ignore the errors and a record contains a fatal error (e.g., a missing SSN), the system will reject the specific record. The system will accept records with non fatal errors (e.g., hours worked missing). See the *Addendum* for a list of error messages.



File Preview

The following are the first ten (10) records accepted from your file. If one of the first ten records in the file submitted has a fatal error, it will not appear. For example, If record "1" has a fatal error and record "2" is clean, "2" will be the first number that appears in the record number column. If there is a problem with the file, please select "Previous" to resubmit a file online.

Record Number	SSN	Last Name	First Name	MI	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Hours Worked	Owner/Officer	Unit Number
1	[redacted]	[redacted]	[redacted]	X	$3,000.00	$10,000.00	$100.48	520	No	0
2	[redacted]	[redacted]	[redacted]	X	$5,000.00	$10,000.00	$100.48	521	No	0
3	[redacted]	[redacted]	[redacted]	X	$7,000.00	$10,000.00	$100.48	522	No	0
4	[redacted]	[redacted]	[redacted]	X	$9,000.00	$10,000.00	$100.48	523	No	0
5	[redacted]	[redacted]	[redacted]	X	$11,000.00	$10,000.00	$100.48	524	No	0
6	[redacted]	[redacted]	[redacted]	8	$13,000.00	$10,000.00	$100.48	525	No	0
7	[redacted]	[redacted]	[redacted]	X	$15,000.00	$10,000.00	$100.48	0	No	0

File Errors

- Click here for detail error descriptions

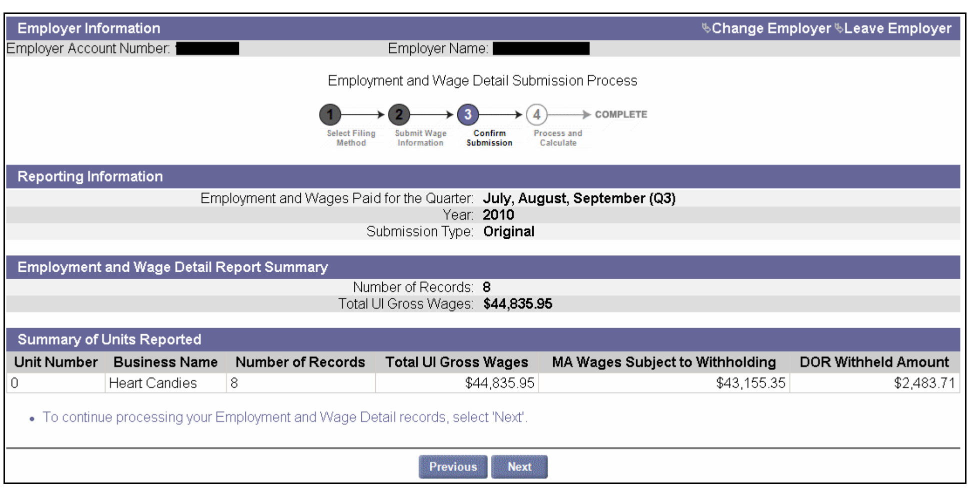
Record Number	Error Message	Error Type
6	Employee Middle Initial 8 is Invalid	Non Fatal Error
7	Employee Hours Worked ** is Invalid	Non Fatal Error
8	Adjustment Reason Code is Missing	Fatal Error

Please Select an Action

○ Ignore Errors and Continue *
○ Make the corrections and resubmit

Previous Next

8. Review the summary information about the upload and click **Next**.



Employer Information Change Employer Leave Employer

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **July, August, September (Q3)**
Year: **2010**
Submission Type: **Original**

Employment and Wage Detail Report Summary

Number of Records: **8**
Total UI Gross Wages: **$44,835.95**

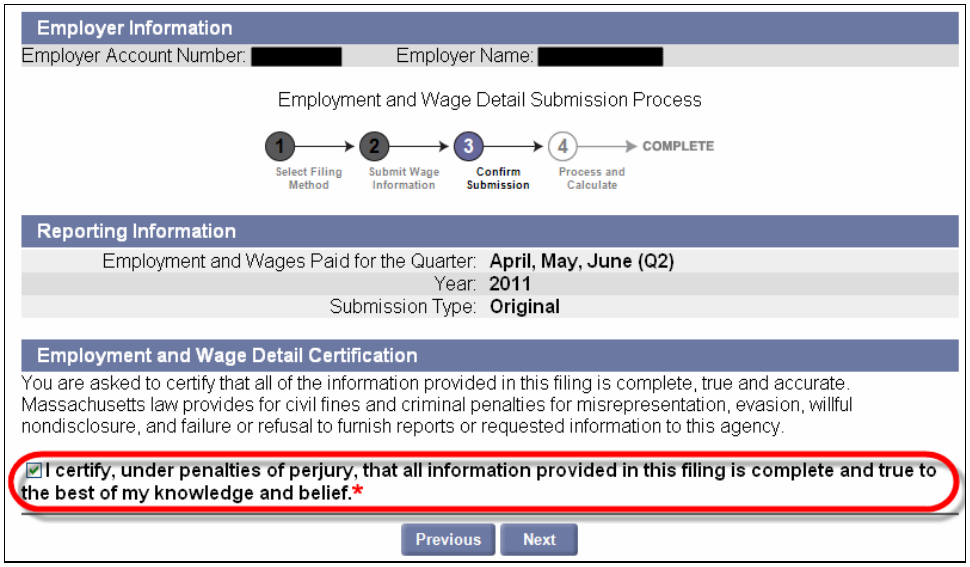
Summary of Units Reported

Unit Number	Business Name	Number of Records	Total UI Gross Wages	MA Wages Subject to Withholding	DOR Withheld Amount
0	Heart Candies	8	$44,835.95	$43,155.35	$2,483.71

- To continue processing your Employment and Wage Detail records, select 'Next'.

Previous Next

9. The **Employment and Wage Detail Certification** page appears. Check the box and click **Next**.



10. Review the Quarterly Calculations and Amount Due.

    IMPORTANT NOTE: If the data uploaded so far is incorrect, the file can be corrected and uploaded again without having to perform an Adjustment as long as you/the Employer **do not click Submit** at this point. See *Performing a Merge or Overwrite*.

Employment and Wage Detail Adjustment Calculations

- The table below illustrates the adjustment's total affect by quarter
- Each line lists the most recently submitted amount, the adjusted submission amount and the difference
- IMPORTANT NOTE: The adjustment process recalculates the quarter adjusted and any subsequent quarters
- Calculations DO NOT include records pending UI staff review. These will be included in a new account statement

	Submission Type	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Amount
Quarterly Wages						
Total UI Gross Wages	Submitted	$0.00	$15,000.00			$15,000.00
	Adjusted	$0.00	$95,000.00			$95,000.00
	Difference	$0.00	$80,000.00			$80,000.00
UI Taxable Wages	Submitted	$0.00	$14,000.00			$14,000.00
	Adjusted	$0.00	$90,000.00			$90,000.00
	Difference	$0.00	$76,000.00			$76,000.00
UHI Taxable Wages	Submitted	$0.00	$0.00			$0.00
	Adjusted	$0.00	$90,000.00			$90,000.00
	Difference	$0.00	$90,000.00			$90,000.00
Contributions						
UI Contribution	Submitted	$0.00	$198.80			$198.80
	Adjusted	$0.00	$1,278.00			$1,278.00
	Difference	$0.00	$1,079.20			$1,079.20
UHI Contribution	Submitted	$0.00	$0.00			$0.00
	Adjusted	$0.00	$0.00			$0.00
	Difference	$0.00	$0.00			$0.00
Workforce Training Fund	Submitted	$0.00	$8.40			$8.40
	Adjusted	$0.00	$54.00			$54.00
	Difference	$0.00	$45.60			$45.60
Secondary Uniform Adjustment	Submitted	$0.00	$0.00			$0.00
	Adjusted	$0.00	$0.00			$0.00
	Difference	$0.00	$0.00			$0.00
Amount Due						
Quarterly Amount Due	Submitted	$0.00	$207.20			$207.20
	Adjusted	$0.00	$1,332.00			$1,332.00
	Difference	$0.00	$1,124.80			$1,124.80

Previous | Submit

11. Click **Submit**. If the file upload is successful, a confirmation will be displayed along with the first 10 rows of data from the uploaded file.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Adjustment Process

1 Select Report → 2 Adjust Records → 3 Confirm Adjustment → 4 Process and Calculate → COMPLETE

Employment and Wage Detail Report Adjustment Confirmation

- Thank you for using our online Employment and Wage Detail Adjustment process. You have successfully adjusted an Employment and Wage Detail Report for Quarter April, May, June (Q2) of Year 2011.
- Your confirmation number is : 090[redacted]07191109551. For future reference, this number is in View Submission History.
- If you would like to make a payment for amounts due select 'Make Payment' at the bottom of this page.
- If you are closing your business and this is your final Employment and Wage Detail Report Select 'Account Maintenance' then 'Suspend Account' from the left navigation and proceed with the prompts.

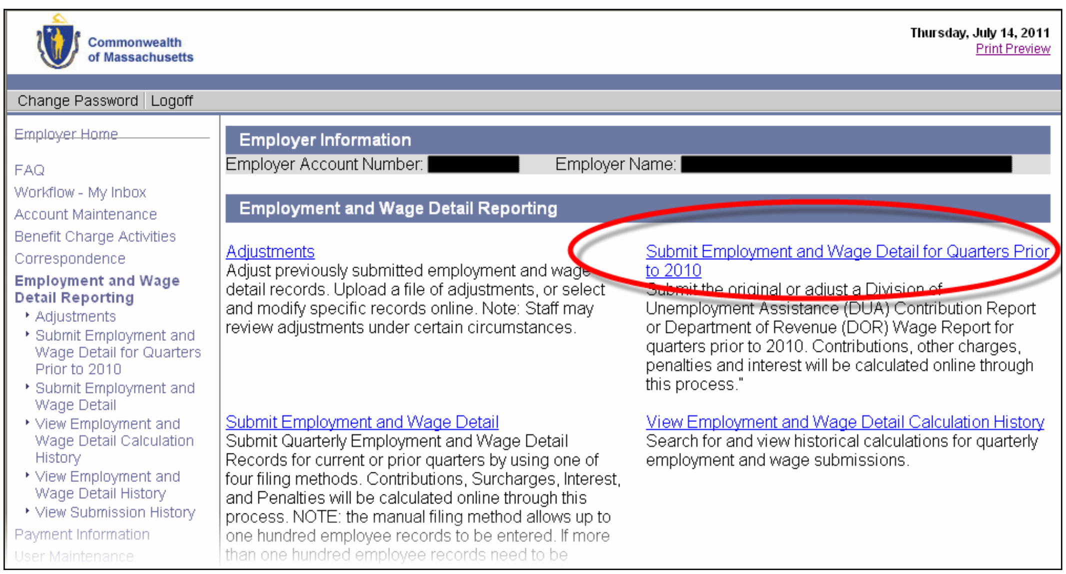
Make Payment

SUBMIT EMPLOYMENT AND WAGE DETAIL FOR QUARTERS PRIOR TO 2010

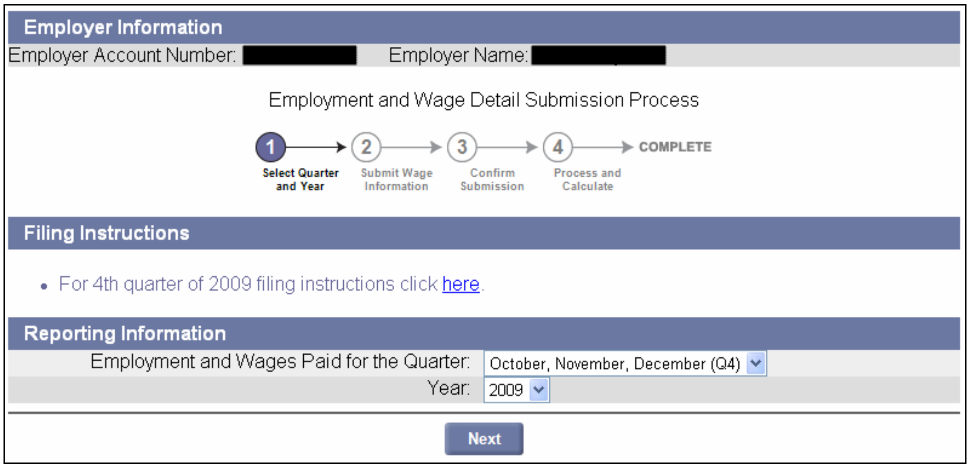
Introduction	This section describes how to submit an employment and wage detail report for quarters prior to 2010. Prior to 2010, Employers are responsible for two separate filings: DUA Contribution Report (i.e., DUA UI and UHI Gross Employment and Wages) and DOR Employment and Wage Detail. The data elements required for DUA filing are: Gross Wages, UI taxable wages, UHI taxable wages and gross 12th of the month employment data. The taxable wages submitted will be used to process and calculate the contribution due. For DOR filing, the user will submit wage detail at the employee level, but it will not be used in the calculation of UI contributions due. The user will be able to submit both original and adjustment submissions using this function. The user will first be required to provide the gross employment and wages (i.e., DUA Contribution Report) and will then be prompted to provide the detail employment and wage information (i.e., DOR Wage Report). The system will allow Employers to submit the employment and wage detail (i.e., DOR Wage Report) using the real-time online file upload or the manual entry filing method.

Manual Entry Method for Quarters Prior to 2010

1. Click **Employment and Wage Detail Reporting**.
2. Click **Submit Employment and Wage Detail for Quarters Prior to 2010**.



3. The **Reporting Information** page appears. Select a year and quarter to file wages for, and click **Next**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Quarter and Year → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Filing Instructions

- For 4th quarter of 2009 filing instructions click here.

Reporting Information

Employment and Wages Paid for the Quarter: October, November, December (Q4)

Year: 2009

Next

4. The **Reporting Information** page reappears, displaying the quarter and year information, the submission type (original or adjustment), and your filing status. Click **Next**.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Quarter and Year → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **October, November, December (Q4)**

Year: **2009**

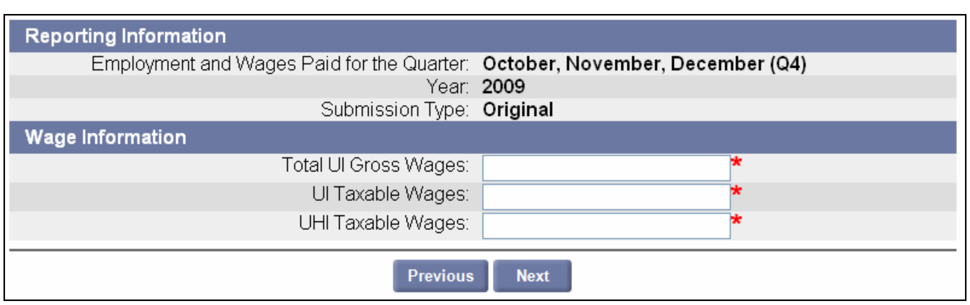
Submission Type: **Original**

Filing Status

You have not filed the DUA Contribution Report or the DOR Wage Report for Quarter 4 and Year 2009. You need to submit the original DUA Contribution Report and the DOR Wage Report

Previous Next

5. The **Wage Information** page appears. Enter Total UI Gross Wages, UI Taxable Wages, and UHI Taxable Wages. Click **Next**.



Reporting Information

Employment and Wages Paid for the Quarter: **October, November, December (Q4)**

Year: **2009**

Submission Type: **Original**

Wage Information

Total UI Gross Wages: *

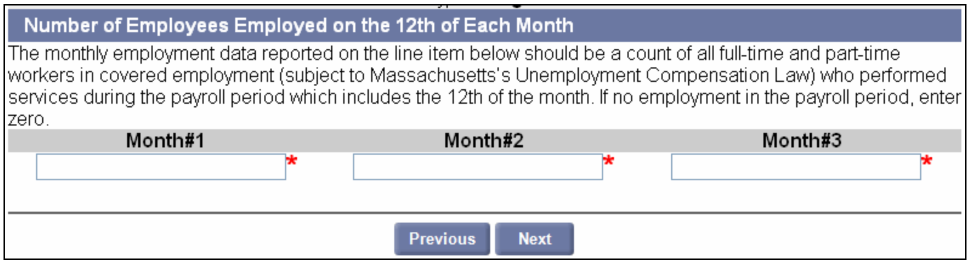
UI Taxable Wages: *

UHI Taxable Wages: *

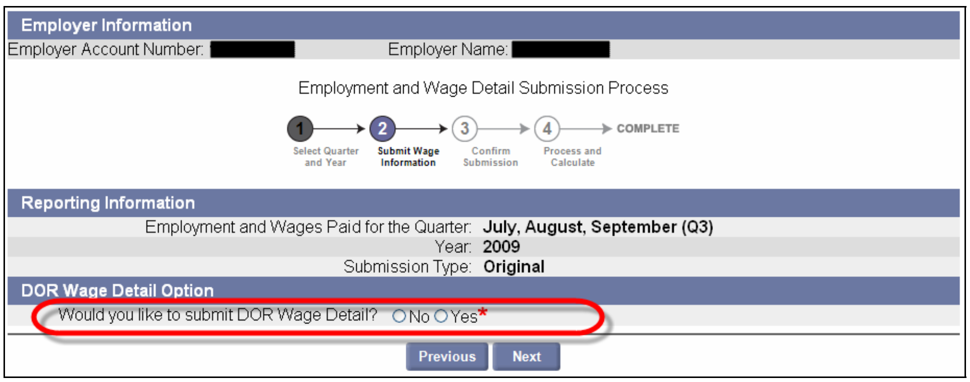
Previous Next

NOTE: If you had fewer than 6 employees on average for the quarter, enter **$0.00** for **UHI Taxable Wages**.

6. Enter the number of employees employed on the 12 of each month of the quarter, and click **Next**.



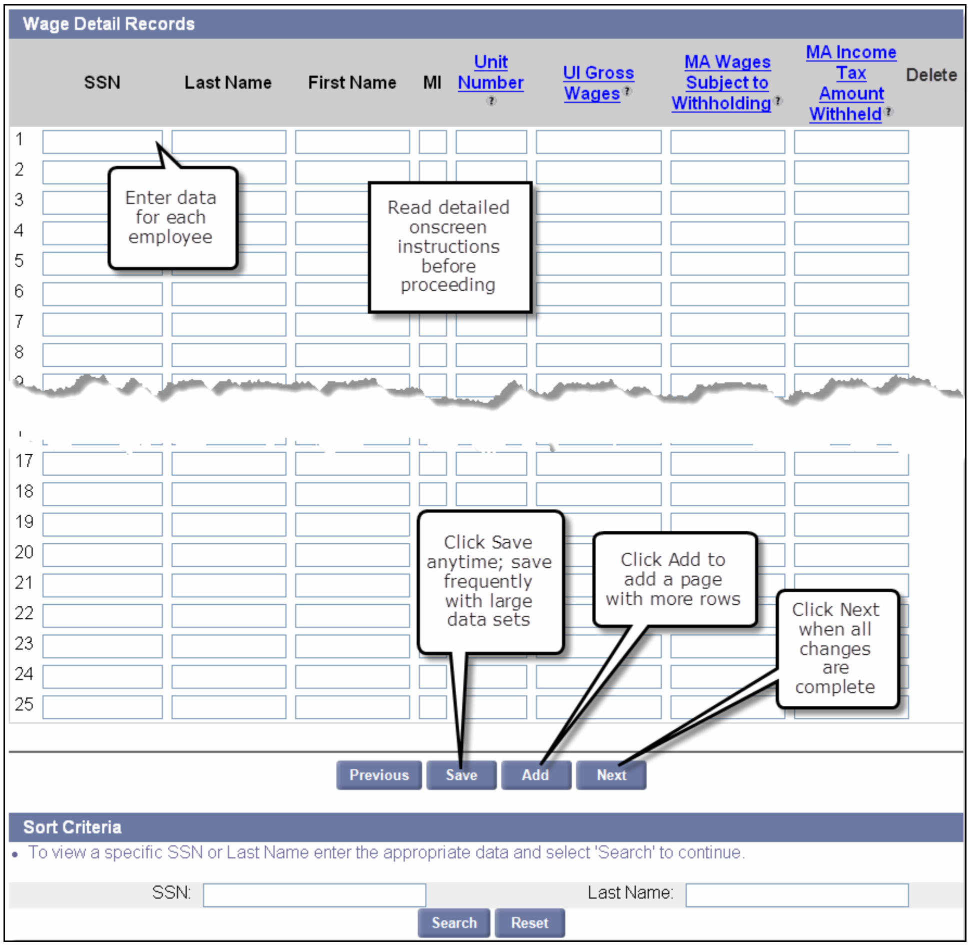
7. If you are filing for Q3 2009 or earlier, the **DOR Wage Detail Option** page appears. Select **Yes** or **No** and click **Next**.



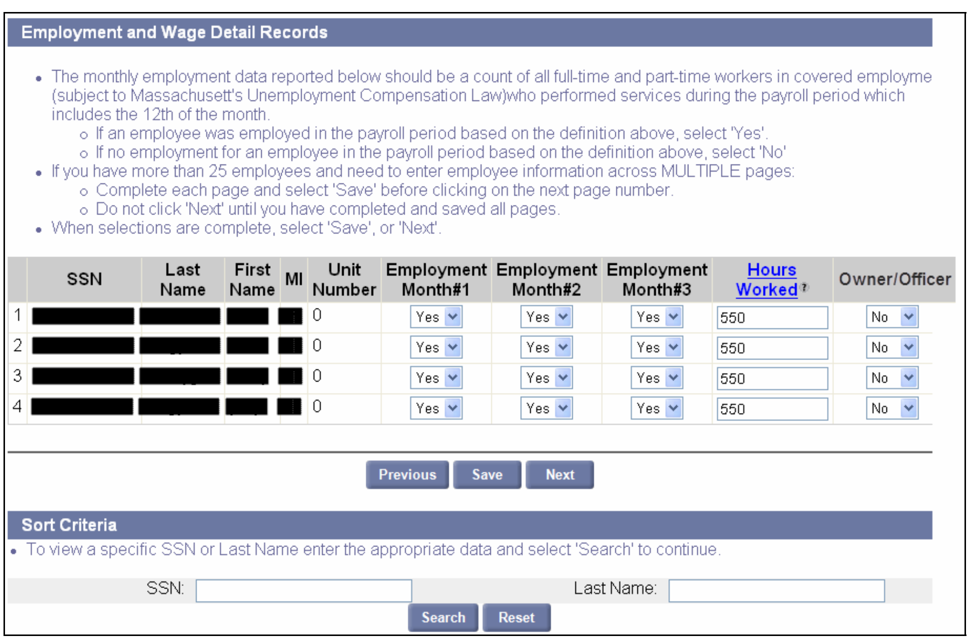
8. If you answered **No** in **Step 7**, skip to **Step 13**. If you answered **Yes** in **Step 7**, or if you are filing for Q4 2009, continue with **Step 9**.

9. The **Filing Method** page appears. Select **Manual Entry** and click **Next**.

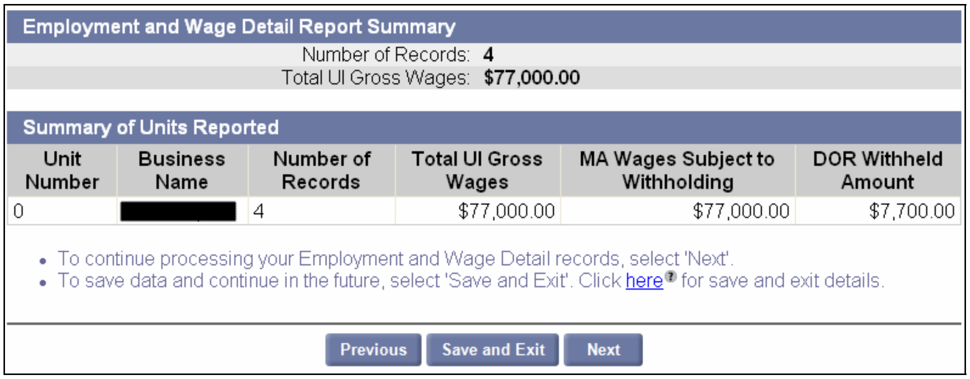
10. The **Wage Detail Records** page appears. Add information for each employee. Save frequently if you enter large amounts of data. Click **Next** to continue.



11. The **Employment and Wage Detail Records** page appears. Provide the requested information. Save frequently if you enter large amounts of data. Click **Next**.



12. The **Employment and Wage Detail Report Summary** page appears. Click **Next**.



Employment and Wage Detail Report Summary

Number of Records: **4**
Total UI Gross Wages: **$77,000.00**

Summary of Units Reported

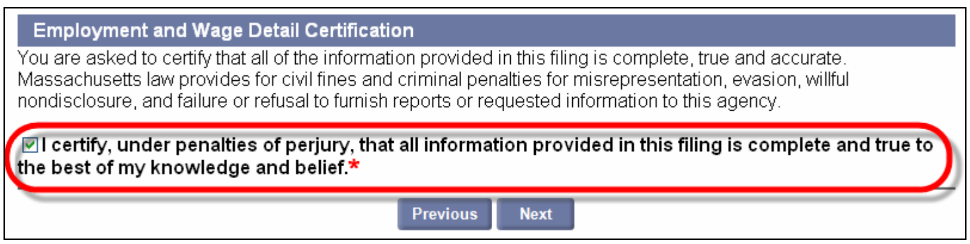
Unit Number	Business Name	Number of Records	Total UI Gross Wages	MA Wages Subject to Withholding	DOR Withheld Amount
0	[redacted]	4	$77,000.00	$77,000.00	$7,700.00

- To continue processing your Employment and Wage Detail records, select 'Next'.
- To save data and continue in the future, select 'Save and Exit'. Click here for save and exit details.

Previous | Save and Exit | Next

NOTE: The calculations shown here are based only on the gross wages entered in **Step 5**. The wage detail information is not used for this calculation.

13. The **Employment and Wage Detail Certification** page appears. Check the box and click **Next**.



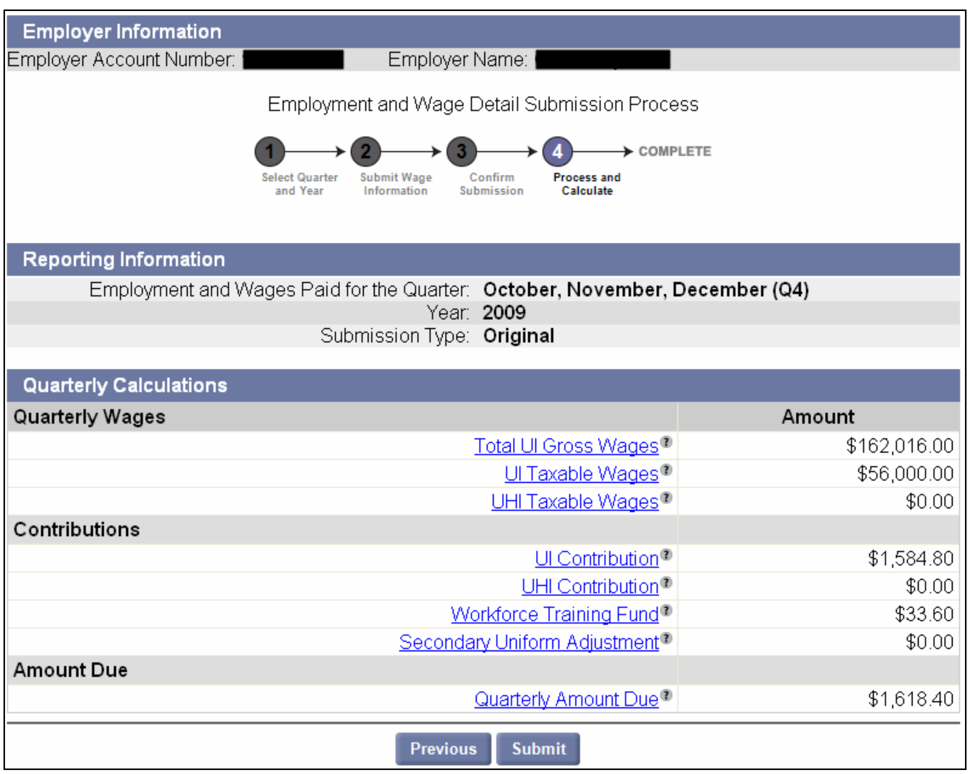
Employment and Wage Detail Certification

You are asked to certify that all of the information provided in this filing is complete, true and accurate. Massachusetts law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this agency.

☑ **I certify, under penalties of perjury, that all information provided in this filing is complete and true to the best of my knowledge and belief.***

Previous | Next

14. The **Quarterly Calculations** page displays. If you are satisfied with the calculations, click **Submit**.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

Reporting Information

Employment and Wages Paid for the Quarter: **October, November, December (Q4)**
Year: **2009**
Submission Type: **Original**

Quarterly Calculations

Quarterly Wages	Amount
Total UI Gross Wages	$162,016.00
UI Taxable Wages	$56,000.00
UHI Taxable Wages	$0.00
Contributions	
UI Contribution	$1,584.80
UHI Contribution	$0.00
Workforce Training Fund	$33.60
Secondary Uniform Adjustment	$0.00
Amount Due	
Quarterly Amount Due	$1,618.40

Previous | Submit

15. The **Employment and Wage Detail Report Submission Confirmation** page appears. Click **Make a Payment** to pay.

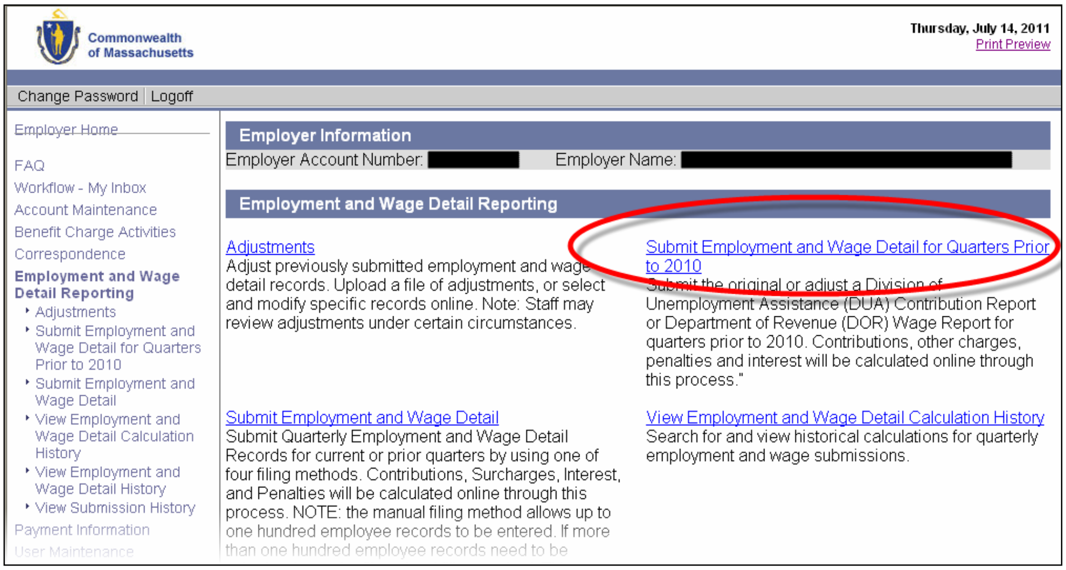
    NOTE: See the section, *Payment Information* for more information on making payments.

File Upload Method for Quarters Prior to 2010

NOTE: If you are preparing an Employment and Wage Detail Report for Q3 of 2009 or earlier, including wage detail in your report is optional. However, if you opt to NOT file wage detail, you cannot file using the file upload.

1. Click **Employment and Wage Detail Reporting**.

2. Click **Submit Employment and Wage Detail for Quarters prior to 2010**.



3. The **Reporting Information** page appears. Select a year and quarter to file wages for, and click **Next**.

4. The **Reporting Information** page reappears, displaying the quarter and year information, the submission type (original or adjustment), and your filing status. Click **Next**.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employment and Wage Detail Submission Process

1 Select Quarter and Year → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

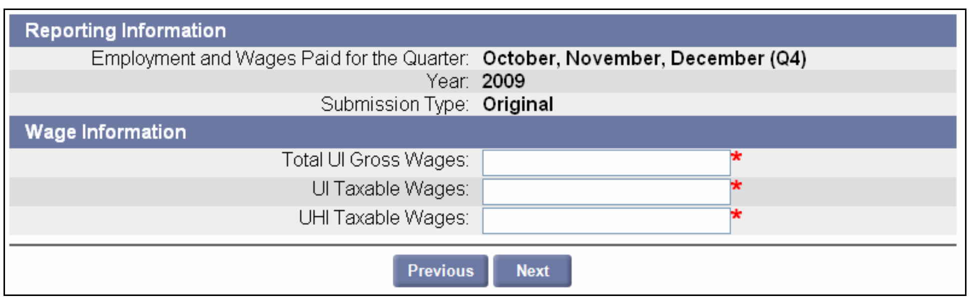
Employment and Wages Paid for the Quarter:	October, November, December (Q4)
Year:	2009
Submission Type:	Original

Filing Status

You have not filed the DUA Contribution Report or the DOR Wage Report for Quarter 4 and Year 2009. You need to submit the original DUA Contribution Report and the DOR Wage Report

Previous Next

5. The **Wage Information** page appears. Enter Total UI Gross Wages, UI Taxable Wages, and UHI Taxable Wages. Click **Next**.



Reporting Information

Employment and Wages Paid for the Quarter:	October, November, December (Q4)
Year:	2009
Submission Type:	Original

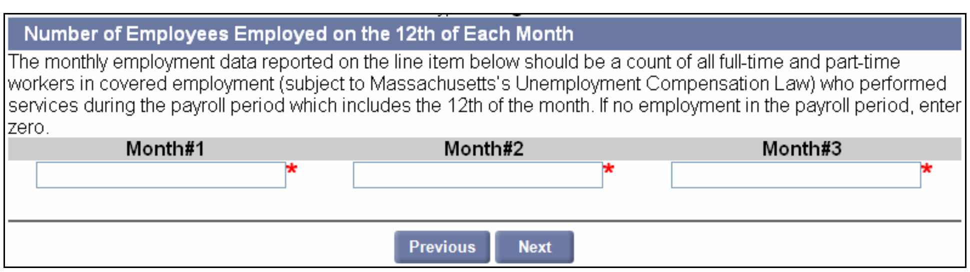
Wage Information

Total UI Gross Wages:	*
UI Taxable Wages:	*
UHI Taxable Wages:	*

Previous Next

NOTE: If you had fewer than 6 employees on average for the quarter, enter **$0.00** for **UHI Taxable Wages**.

6. On the next page, enter the number of employees employed on the 12 of each month of the quarter, and click **Next**.



Number of Employees Employed on the 12th of Each Month

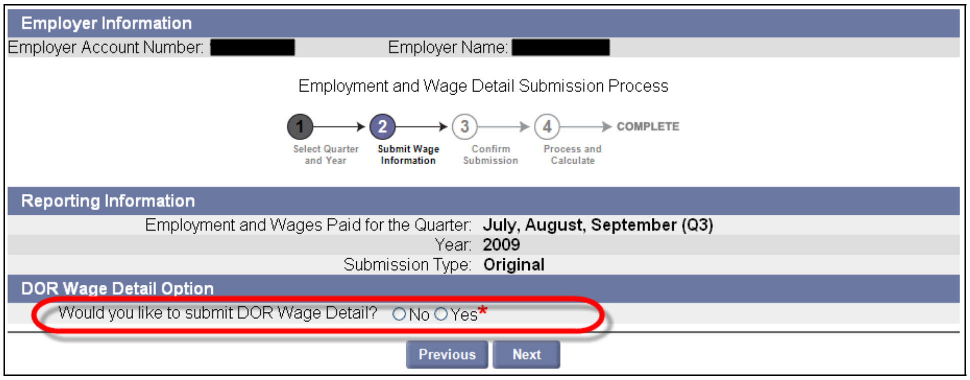
The monthly employment data reported on the line item below should be a count of all full-time and part-time workers in covered employment (subject to Massachusetts's Unemployment Compensation Law) who performed services during the payroll period which includes the 12th of the month. If no employment in the payroll period, enter zero.

Month#1	Month#2	Month#3
*	*	*

Previous Next

7. If you are filing for Q3 2009 or earlier, the **DOR Wage Detail Option** page appears. Select **Yes** and click **Next**.

   NOTE: If you answer **No** in **Step 7**, you cannot submit the Employment and Wage Detail Report in a file upload.



8. The **Filing Method** page appears. Select **File Upload** and click **Next**.

9. Finish the process by following the instructions starting at **Step 4** on page 124 (in the section, *Performing a File Upload*, under *Submit Employment and Wage Detail*).

Payment Information

ABOUT PAYMENT INFORMATION

Introduction

This section describes the functions that are available from the Payment Information area. From Payment Information, you can:

- Access the **Payment Account Summary** area, from which you can **make payments**; and **view information** about transactions, contributions, balances, payments, charges, debt, interest, and penalties.
- Search payments
- Cancel a payment
- Request for 940 Certification
- Request a payment plan

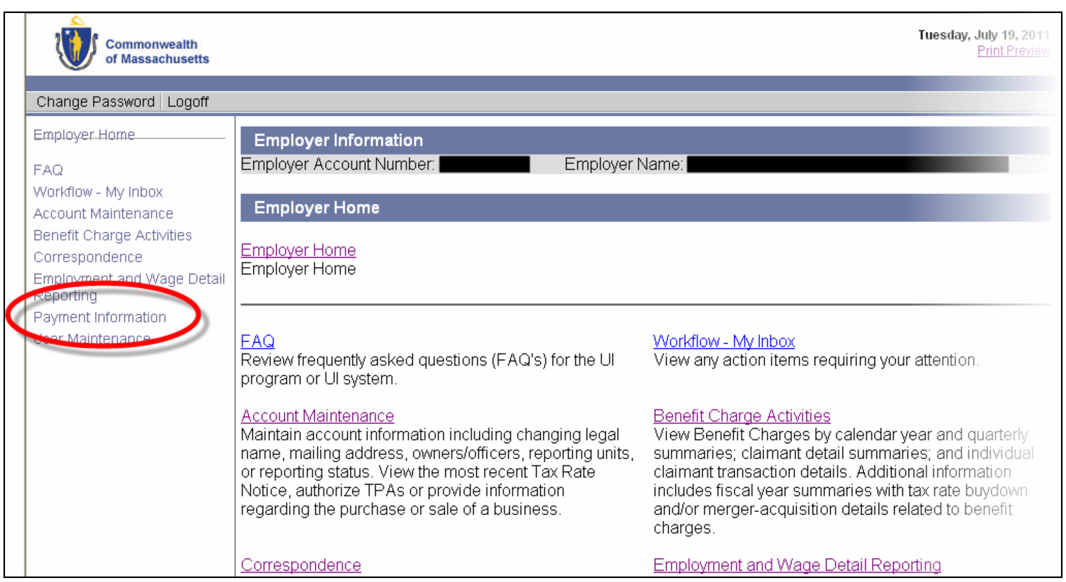
NOTE: Payments made for UI, UHI, and WTF are held by law in separate fiduciary accounts. Credits are reviewed, approved, and remitted strictly separately as well. Do not underpay UI, UHI, or WTF obligations on the assumption that a possible credit for one obligation will offset the underpayment of another.

NOTE: Voluntary Contributions are initiated from the **Account Maintenance** area. See the section, *Making a Voluntary Contribution* for information.

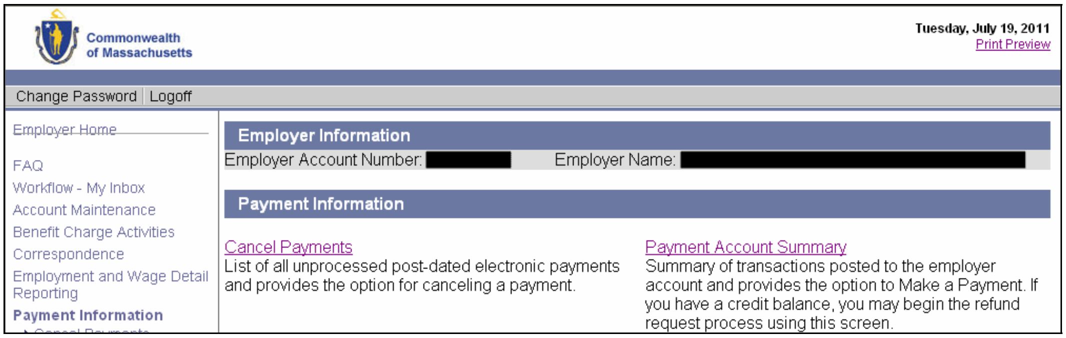
NAVIGATING TO PAYMENT INFORMATION

To navigate to the **Payment Information** page, perform the following steps:

1. Log in to QUEST. Click the **Payment Information** link in the left pane (the link also appears on the main pane of the Employer Home page).



2. The **Payment Information** page appears.



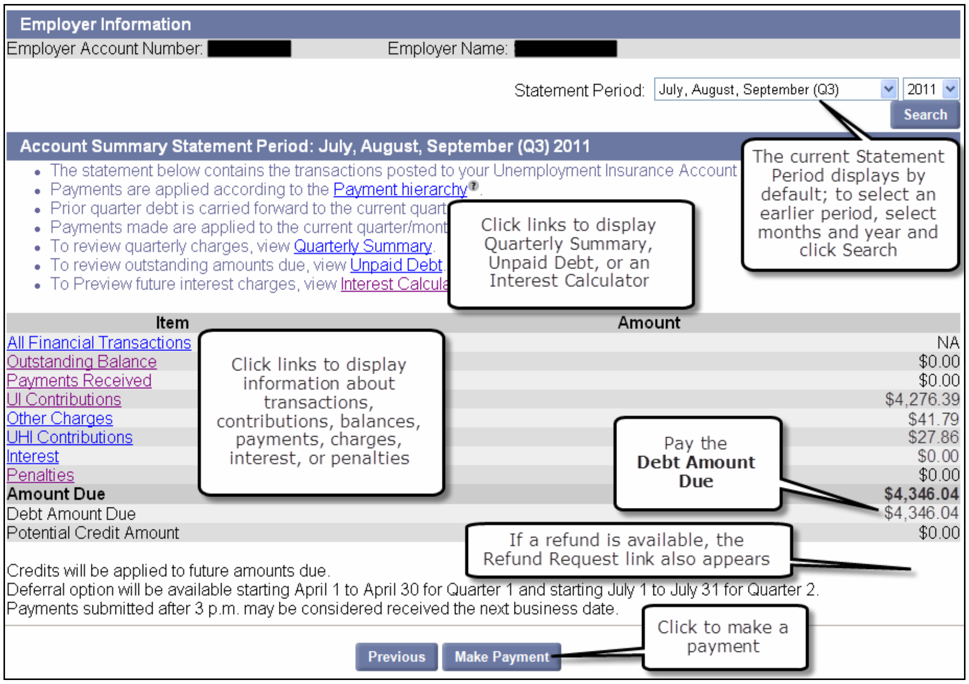
PAYMENT ACCOUNT SUMMARY

Introduction	You can perform the following actions from the **Payment Account Summary** page: • Make a payment • Make a refund request The **Payment Account Summary** page also displays the following summary information for the selected **Statement Period**. (Most of these items can be clicked for greater detail as well): • All Financial Transactions • Outstanding Balance • Payments Received • UI Contributions • Other Charges • UHI Contributions • Interest • Penalties • Amount Due • Debt Amount Due • Potential Credit Amount The page also has the following links to click for additional information: • Quarterly Summary • Unpaid Debt • Interest Calculator **NOTE**: By default, the **current** Statement Period displays on the Payment Account Summary page. Keep this Statement Period to display information about the most recently completed transactions. (The outstanding balance that comes due in the current Statement Period is incurred up to the end of the previous Statement period.) **NOTE**: ACH Credit payments are not made using the QUEST software. If you wish to setup payments using the ACH Credit method, see the section, *Applying to DUA to Make Payments Using ACH Credit.*
Helpful Hint	Payments are applied according to a prescribed payment hierarchy. Click the **Payment hierarchy** assistive content link on the Payments Account Summary page to view detailed information.

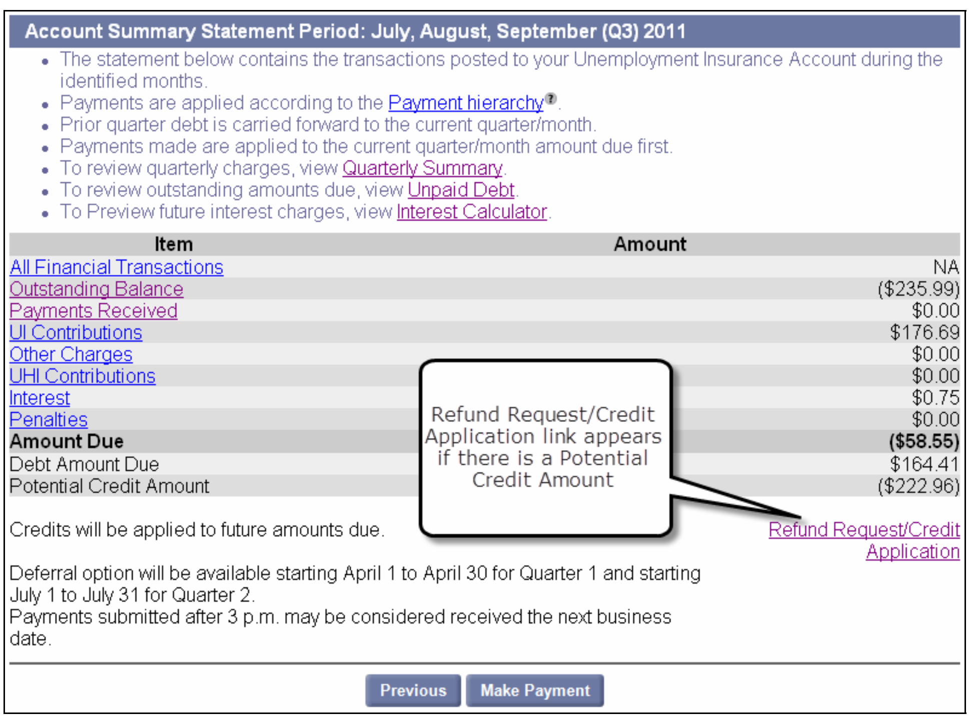
Navigating to Payment Account Summary

1. Follow the steps in the section, *Navigating to Payment Information*.
2. Click **Payment Account Summary**. By default, a summary for the current Statement Period displays.

Example 1: Payment Account Summary with **Debt Amount Due**



Example 2: Payment Account Summary page displays a **Refund Request** link if a Potential Credit is available.



3. Select a different Statement Period using drop-down lists for months and/or year, and click **Search**.

4. Click a link to view the Payment Hierarchy, a Quarterly Summary, Unpaid Debt, or an Interest Calculator, or more details about transactions, balance, payments, contributions, charges, interest, or penalties.

Example 1: The Quarterly Summary page. This page provides a summary view of contributions, payments, etc. due for **chosen quarter only**. It does not include balances due from previous quarters.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Quarterly History Detail Search

Quarter: April, May, June (Q2) 2011

Search

Quarterly History Detail

Quarterly Wages	Amount Due		
Total UI Gross Wages	$80,648.00		
UI Taxable Wages	$69,648.00		
UHI Taxable Wages	$69,648.00		
Debt	**Amount Due**	**Amount Paid**	**Amount Remaining**
UIContribution	$4,276.39	$0.00	$4,276.39
Reimbursable	$0.00	$0.00	$0.00
UHIContribution	$27.86	$0.00	$27.86
Workforce Training Fund	$41.79	$0.00	$41.79
Uniform Secondary Adjustment	$0.00	$0.00	$0.00
Interest	**Amount Due**	**Amount Paid**	**Amount Remaining**
Interest	$0.00	$0.00	$0.00
Totals	**Amount Due**	**Amount Paid**	**Amount Remaining**
Totals	$4,346.04	$0.00	$4,346.04

Payments Applied To Quarter

Payments may be applied across multiple quarters. Select links below to review each payments.

No records found...

Example 2: The Unpaid Debt page. This page provides a breakdown of unpaid amounts.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Unpaid Debt

Date Established	Date Due	Debt Type	Description	Original Amount	Amount Unpaid
7/18/2011	7/31/2011	UHI Contribution Principal	2011 - Quarter 2 UHI Contributions	$27.86	$27.86
7/18/2011	7/31/2011	UI Contributions Principal	2011 - Quarter 2 Wage Detail Report Filing	$4,276.39	$4,276.39
7/18/2011	7/31/2011	WTF Principal	2011 - Quarter 2 Workforce Training Fund	$41.79	$41.79
			Total:	**$4,346.04**	**$4,346.04**

Previous

Example 3: The Interest Calculator page. Use this page to calculate the interest due on all outstanding balances. (Interest cannot be calculated for a past date or for a date for which contribution calculations do not yet exist).

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Future Calculation End Date: 8/15/2011 * (mm/dd/yyyy)

Enter a future date through which interest should be calculated

Calculation Details - UI

Year	Month/Quarter	Program	Principal	Interest	Total
2009	Q3	UI	$632.68	$135.83	$768.51
2009	Q1	UI	$862.79	$237.42	$1,100.21
2009	Q4	UI	$325.78	$60.08	$385.86
2009	Q2	UI	$905.50	$221.79	$1,127.29
				Total:	$3,381.87
2008	Q2	UI	$676.86	$247.01	$923.87
2008	Q4	UI	$501.79	$152.76	$654.55
2008	Q1	UI	$471.80	$186.45	$658.25
				Total:	$2,236.67
2007	Q4	UI	$470.09	$199.68	$669.77
2007	Q1	UI	$244.37	$125.97	$370.34
2007	Q2	UI	$206.77	$100.34	$307.11
				Total:	$1,347.22

Calculation Details - WTF

Year	Month/Quarter	Program	Principal	Interest	Total
2009	Q1	WTF	$16.43	$4.52	$20.95
2009	Q2	WTF	$17.25	$4.22	$21.47
2009	Q3	WTF	$12.05	$2.59	$14.64
2009	Q4	WTF	$6.21	$1.14	$7.35
				Total:	$64.41
2008	Q2	WTF	$12.05	$4.40	$16.45
2008	Q4	WTF	$8.93	$2.72	$11.65
2008	Q1	WTF	$8.40	$3.32	$11.72
				Total:	$39.82
2007	Q1	WTF	$4.02	$2.08	$6.10
2007	Q4	WTF	$7.73	$3.29	$11.02
2007	Q2	WTF	$3.40	$1.65	$5.05
				Total:	$22.17

Program Totals

Total Interest	$1,697.26
Total UI Debt:	$5,298.43
Total UHI Debt:	$0.00
Total WTF Debt:	$96.47
Total Reimbursable Debt:	$0.00
Total Uniform Secondary Adjustment Debt:	$0.00
Total Conversion Surcharge Debt:	$0.00
Total State/Federal Extended Benefits Debt:	$0.00
Total Workshare Principal Debt:	$0.00
Total Penalties:	$0.00
Total Liability:	$7,092.16
Potential Credits:	$0.00
Amount Due:	$7,092.16

Our records indicate you have not submitted a employment and wage report (* indicates the quarter has been assessed)

Year	Quarters
2007	3, 4
2010	1, 2, 3, 4
2011	1

Unfiled Quarters

The information displayed does not include any potential penalties or future liabilities.

Click Calculate

Previous | Make Payment | Calculate

MAKING A PAYMENT

There are three methods of payment: **Paper check**, **ACH Debit**, and **ACH Credit**. Only the instructions for paying by paper check or ACH Debit are included below.

Making an ACH Credit payment is not performed using the QUEST software. However instructions for accessing the application to pay by ACH Credit are also provided below.

Applying to DUA to Make Payments Using ACH Credit

If you wish to use the ACH Credit method of payment, follow the instructions below to access the application.

1. Navigate to www.mass.gov/uima.
2. Click the **Forms** link under the **Our Organization** area, and click **ACH Credit**.
3. Fill out and submit the application according to the instructions.

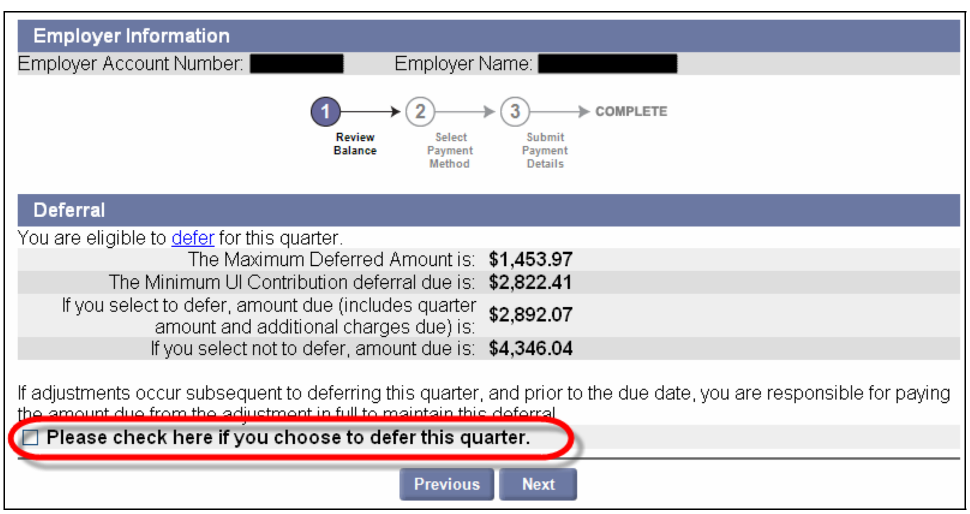
   NOTE: A sample form also appears in the Addendum to this document.

Making a Payment with a Paper Check

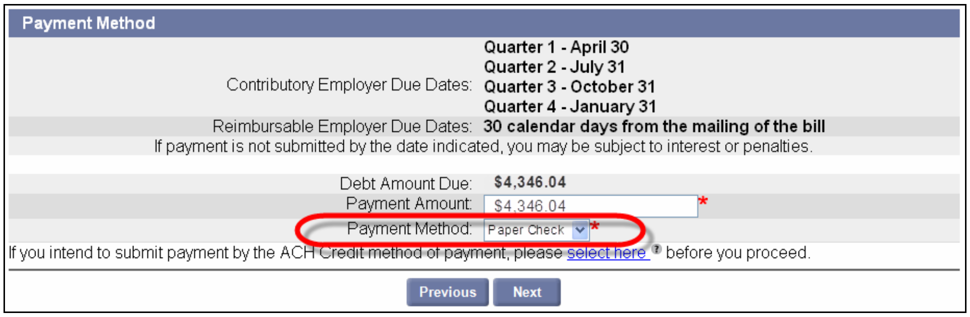
NOTE: Even if a TPA is performing this procedure on an Employer's behalf, **the check must issued by the Employer, not the TPA**.

1. Click **Payment Information**.
2. Click **Payment Account Summary**.
3. Click **Make Payment**.
4. If you are eligible for the deferral option, the **Deferral** page appears showing amounts due with or without deferral. Check the box if you wish to use a deferral. Click **Next**.

   NOTE: The Deferral page only appears if you are eligible to defer some of your payment.

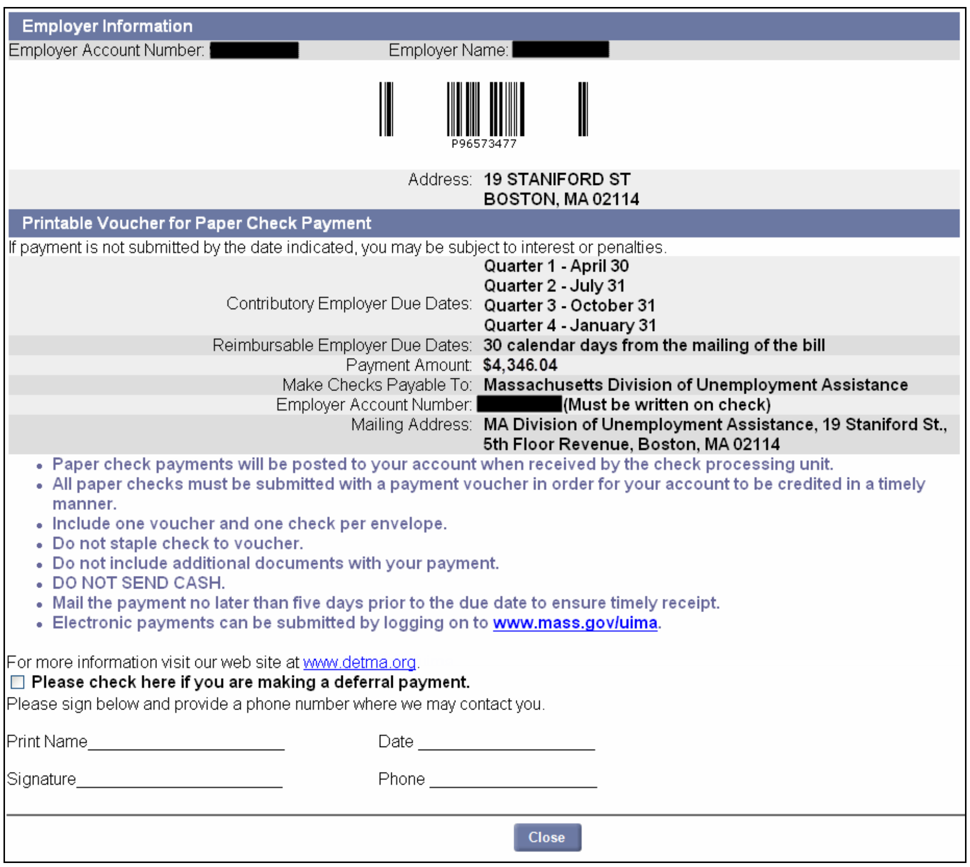


5. In the **Payment Method** page, enter a **Payment Amount**. Select **Paper Check**. Click **Next**.



6. The **Printable Voucher for Paper Check Payment** page appears. Print this voucher and include it with your paper check. (See the instructions on the voucher for detailed instructions). Click **Close**.

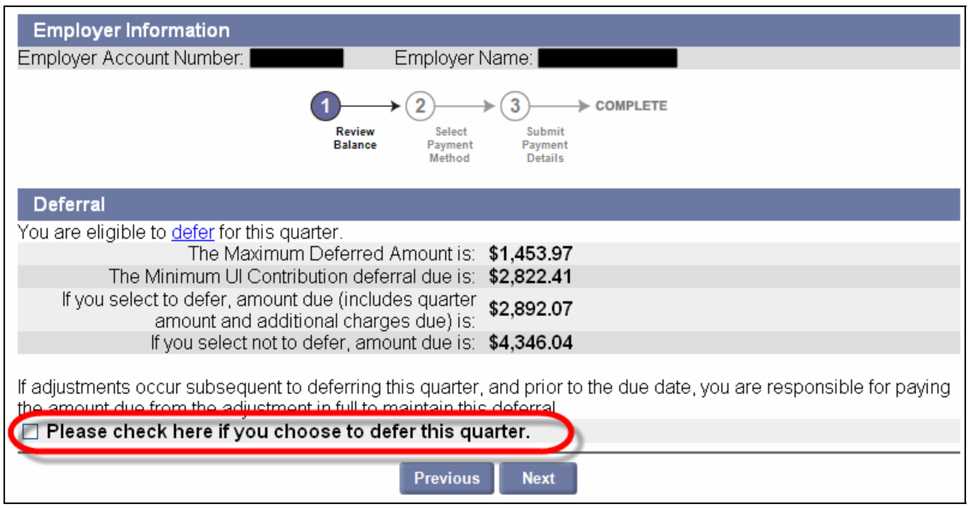
NOTE: Paper check payments will be posted to your account when received by the check processing unit.



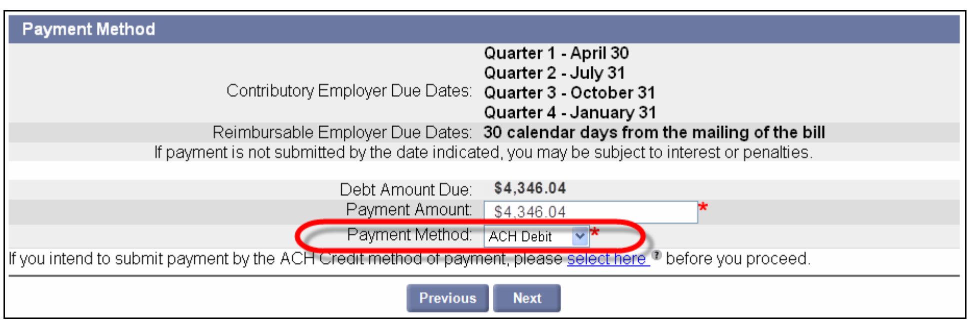
Making a Payment Using ACH Debit

1. Click **Payment Information**.
2. Click **Payment Account Summary**.
3. Click **Make Payment**.
4. If you are eligible for the deferral option, the **Deferral** page appears showing amounts dues due with or without deferral. Check the box if you wish to use a deferral. Click **Next**.

   NOTE: The Deferral page only appears if you are eligible to defer some of your payment.



5. In the **Payment Method** page, enter a **Payment Amount**. Select **ACH Debit**. Click **Next**.



6. The **ACH Payment** page appears. Enter the **Routing Transit Number** and **Bank Account Number**, select the **Account Type**, and enter the **Payment Effective Date**. Click **Next**.

ACH Payment

Contributory Employer Due Dates:	**Quarter 1 - April 30** **Quarter 2 - July 31** **Quarter 3 - October 31** **Quarter 4 - January 31**
Reimbursable Employer Due Dates:	**30 calendar days from the mailing of the bill**

If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Debt Amount Due:	**$4,346.04**
Payment Amount:	$4,346.04 *
Routing Transit Number:	* Select other bank account
Bank Account Number:	*
Account Type:	Checking *
Payment Effective Date:	8/27/2011 * (mm/dd/yyyy)

Your Routing Transit Number and Bank Account Number are located on the paper checks provided by your bank.

Previous | Next

IMPORTANT NOTE: The Routing Transit Number and the Bank Account Number are NOT retained in the QUEST system, as a security measure. Enter the numbers each time you submit a payment.

NOTE: If you have a previous outstanding balance, Payment Effective Date cannot be later than the current date.

7. The **Payment Verification** page appears. Review the information and click **Submit**.

Payment Verification

Contributory Employer Due Dates:	**Quarter 1 - April 30** **Quarter 2 - July 31** **Quarter 3 - October 31** **Quarter 4 - January 31**
Reimbursable Employer Due Dates:	**30 calendar days from the mailing of the bill**

If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Total Payment Amount:	**$4,346.04**
Routing Transit Number:	**XXXXX0138**
Bank Account Number:	**1**
Account Type:	**Checking**
Payment Effective Date:	**8/27/2011**

By paying your Division of Unemployment Assistance bill by way of this online service, you are authorizing Division of Unemployment Assistance to charge your checking account for the amount you submitted.

Previous | Cancel | Submit

8. The **Payment Confirmation** page appears, displaying your payment confirmation number. The payment confirmation number can be used for future reference.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

1 Review Balance → 2 Select Payment Method → 3 Submit Payment Details → COMPLETE

Payment Confirmation

Employer Name:	[redacted]	Employer Account Number:	[redacted]
Effective Date:	**8/27/2011**	Payment Confirmation #:	[redacted]
Transaction Date:	**8/27/2011**	Payment Method:	**ACH Debit**
Transaction Time:	**10:07 AM**		
Remaining Balance:	**$0.00**	Total Payment Amount:	**$4,346.04**

If you have a remaining balance you may make another payment by selecting "Make Payment"

ABOUT DEFERRALS

Introduction

Deferral eligibility is given to private Contributory and non-profit 501(c)(3) Contributory Employers.

To qualify for deferral, the Employer must:

- Have timely filed their current Employment and Wage Detail Report
- Be making a timely payment
- Make the entire payment using a single ACH Debit payment, or a single paper check payment

The option to defer is available in the month of April for Quarter 1 filing or July for Quarter 2 filing. All deferrals become due by the Quarter 3 due date (Oct. 31). Deferrals can only be performed by Employers (not TPAs making bulk payments).

NOTE: Deferral is not a requirement.

In the first quarter, the Employer may defer up to 34% of the UI contribution due.

In the second quarter, the Employer may defer up to 34% of both the UI contribution due and the previous quarter deferral amount.

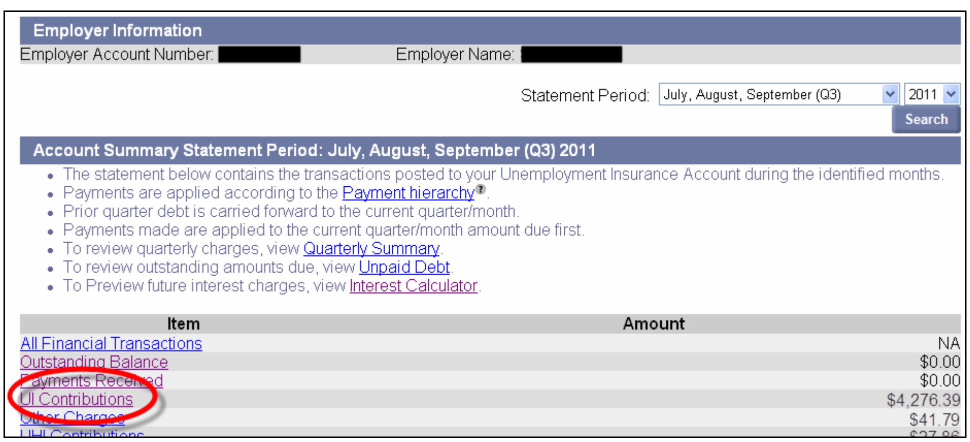
In the third or fourth quarter, the Employer cannot defer any portion of the UI contribution due.

NOTE: Deferrals do not apply to the Workforce Training Fund (WTF) or the Unemployment Health Insurance (UHI) amounts due. **Employers should pay their WTF and UHI amounts due in full each quarter**, regardless of whether they apply deferrals to the amount of UI they owe each quarter.

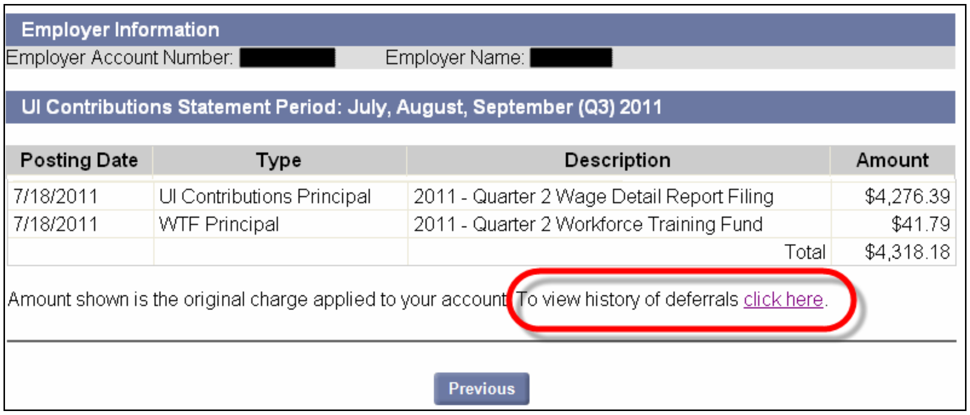
The Deferral Option page appears automatically during the window for Q1 and Q2 payments, **if you are eligible**. The instructions for deferring payments appear in the section, *Making a Payment*.

Viewing a Deferral

1. Click **Payment Information**.
2. Click **Payment Account Summary**.
3. Click **UI Contributions**.



4. The **UI Contributions Statement Period** page appears. Click the "click here" link to view a history of deferrals.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

UI Contributions Statement Period: July, August, September (Q3) 2011

Posting Date	Type	Description	Amount
7/18/2011	UI Contributions Principal	2011 - Quarter 2 Wage Detail Report Filing	$4,276.39
7/18/2011	WTF Principal	2011 - Quarter 2 Workforce Training Fund	$41.79
		Total	$4,318.18

Amount shown is the original charge applied to your account. To view history of deferrals click here.

Previous

5. The **Deferral History** page appears.

Deferral History

Posting Date	Type	Description	Status	Original Amount	Deferred Amount
7/18/2011	UI Contributions Principal	2011 - Quarter 2 Wage Detail Report Filing	Deferred	$4,276.39	$1,453.97

To review quarterly changes, view Quarterly Summary.

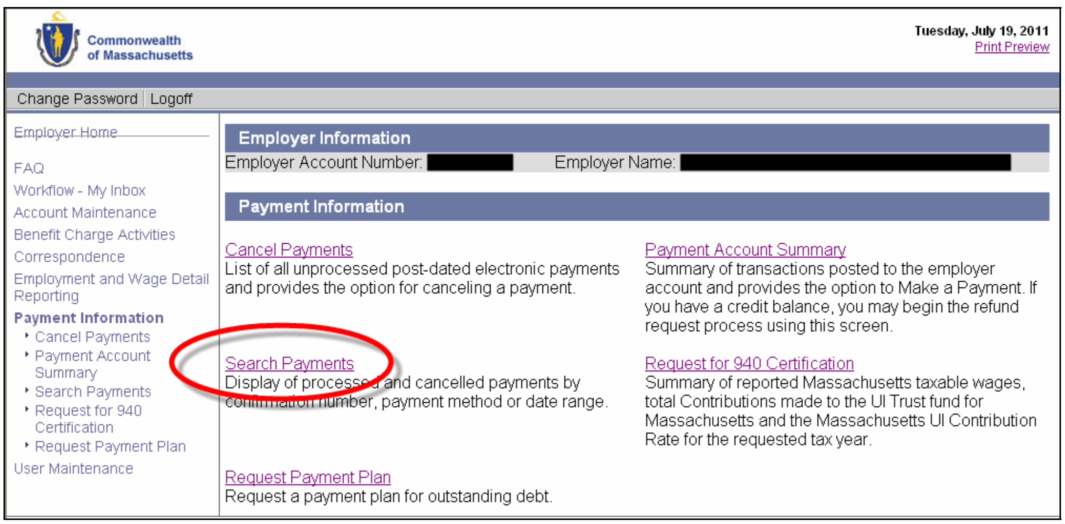
Previous

SEARCH PAYMENTS

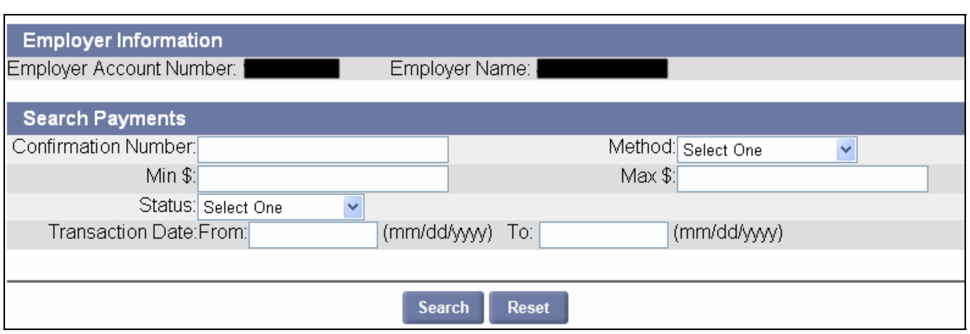
Introduction	This section describes how to search for and view all payments, the payment status, and details associated with the Employer account. **NOTE**: Any payment made by an Employer will appear in the search results when an Employer searches payments. If an Employer uses a TPA and the TPA includes the Employer's payment in a bulk payment to the DUA, then the Employer's payment does not appear in the search results when an Employer searches payments. However, an Employer can view all payment information for a specific Statement Period from the **Payment Account Summary** page by clicking the **Received Payments** link.

1. Follow the steps in the section, *Navigating to Payment Information*.

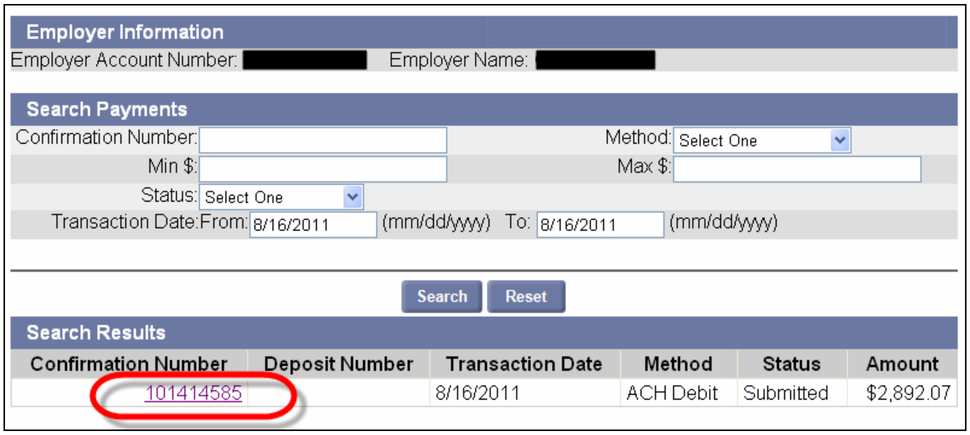
2. Click **Search Payments**.



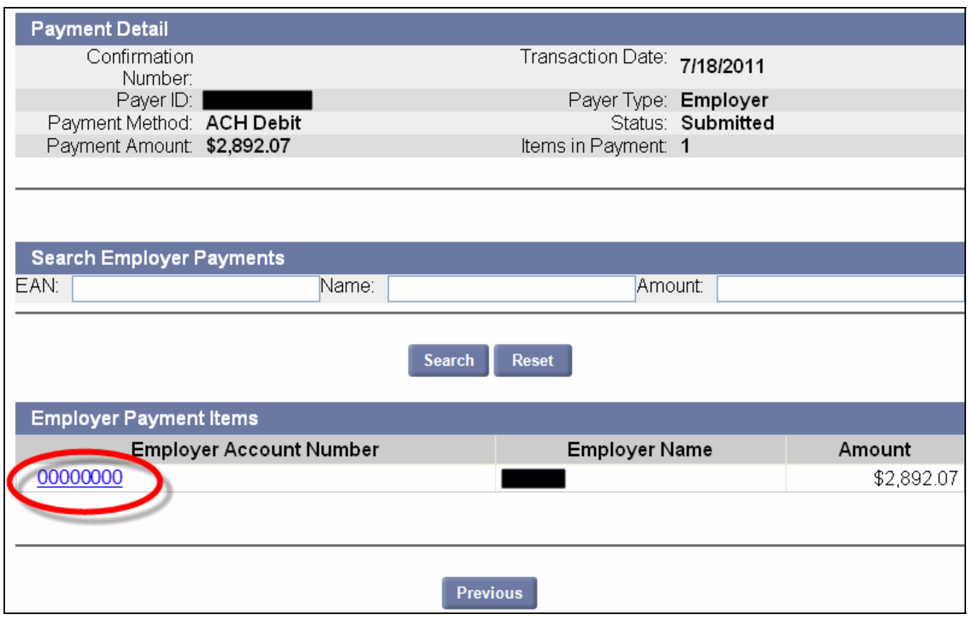
3. The **Search Payments** page appears. Select a **Status** and a **Method**. Enter other search criteria, or leave fields blank to return all applicable payments. Click **Search**.



4. The search results appear below the search grid. Click on the **Confirmation Number** of a submitted payment to view the payment details.



5. The **Payment Detail** page displays. Click on an **Employer Account Number** in the **Employer Payment Items** area to view the payment distribution.



6. The **Payment Distribution** area displays the Debt Posting Date, Sub-Account, Period, and Amount Applied for the payment.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Payment Detail

Confirmation Number	Receipt Date	Posting Date	Method	Description	Amount
101414585	8/16/2011		ACH Debit	Account XXXX45 Paid by Employer	$2,892.07

Payment Distribution

View Redistribution History

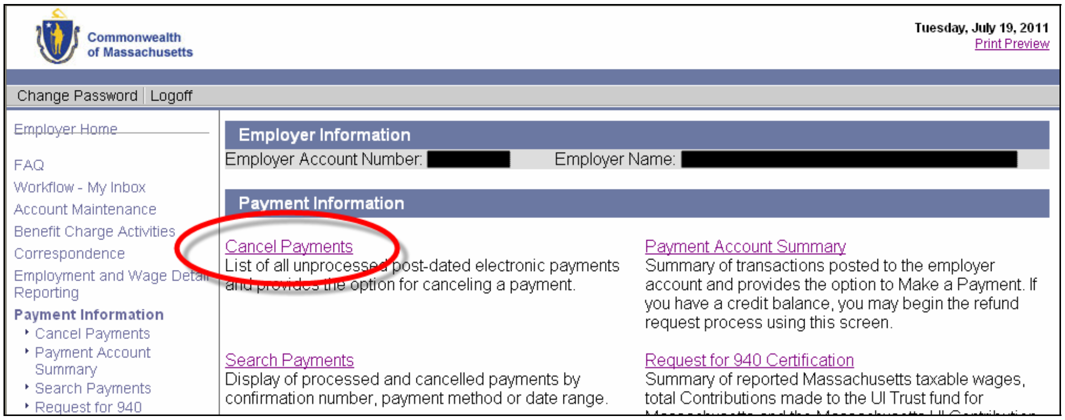
Debt Posting Date	Sub-Account	Period	Amount Applied
8/16/2011	UI Contributions Principal	2011 - Quarter 3 Wage Detail Report Filing	$2,892.07
		Total:	$2,892.07

Previous

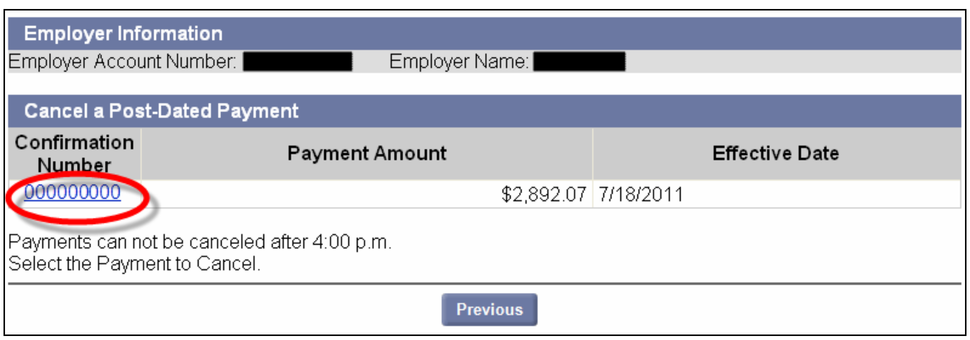
CANCEL PAYMENT

Introduction	This section describes how to cancel a payment in progress. Only payments that have not been processed completely can be canceled, i.e., the status of a payment must be **Submitted** for it to be canceled. If a payment has already been processed it cannot be cancelled. **NOTE**: Payments cannot be canceled after 4:00 PM.

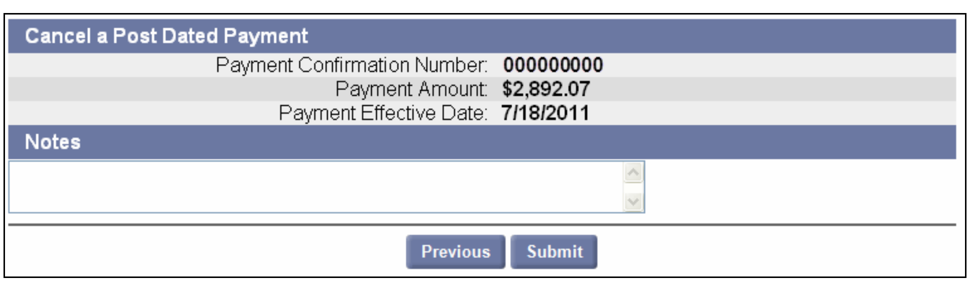
1. Follow the steps in the section, *Navigating to Payment Information*.
2. Click **Cancel Payments**.



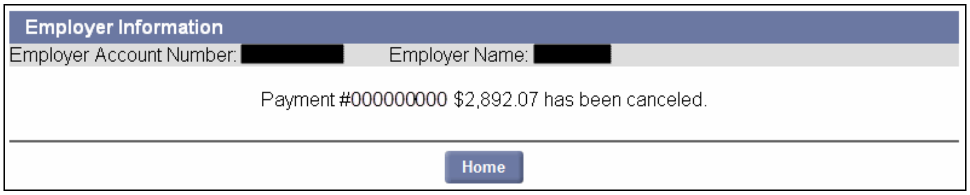
3. The **Cancel a Post-Dated Payment** page appears, listing all unprocessed payments eligible for cancellation. Click on the **Confirmation Number**.



4. Enter notes about the cancellation and click **Submit**.



5. An information page appears confirming that the cancellation is complete.



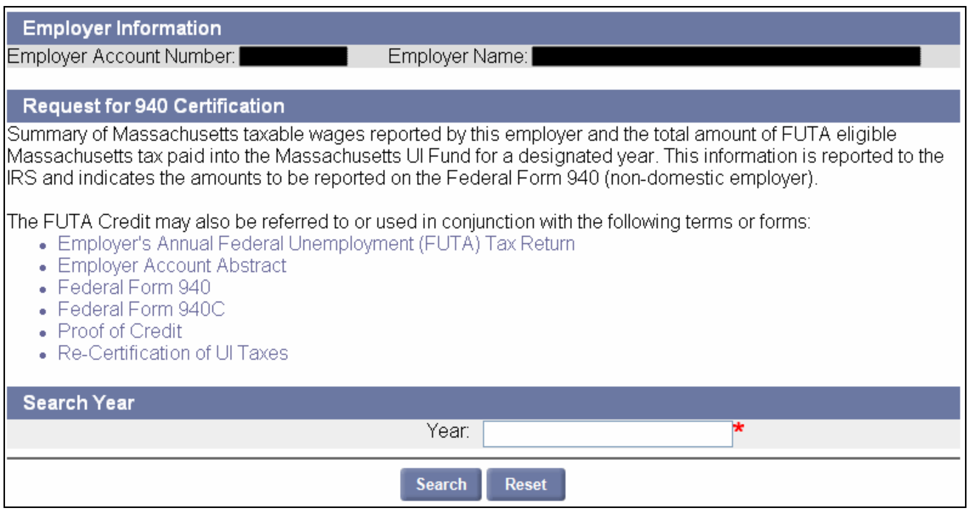
REQUEST FOR 940 CERTIFICATION

Introduction

This section describes how to request for 940 Certification for an Employer account. 940 Certification provides a summary of Massachusetts taxable wages reported by an Employer and the total amount of FUTA eligible Massachusetts tax paid into the Massachusetts UI Fund for a designated year. This information is used to report to the IRS and the system provides the capability of running this report on demand.

NOTE: Governmental Entities are not subject to FUTA and cannot request FUTA certification.

1. Follow the steps in the section, *Navigating to Payment Information*.
2. Click **Request for 940 Certification**. The following page appears.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Request for 940 Certification

Summary of Massachusetts taxable wages reported by this employer and the total amount of FUTA eligible Massachusetts tax paid into the Massachusetts UI Fund for a designated year. This information is reported to the IRS and indicates the amounts to be reported on the Federal Form 940 (non-domestic employer).

The FUTA Credit may also be referred to or used in conjunction with the following terms or forms:

- Employer's Annual Federal Unemployment (FUTA) Tax Return
- Employer Account Abstract
- Federal Form 940
- Federal Form 940C
- Proof of Credit
- Re-Certification of UI Taxes

Search Year

Year: *

Search Reset

3. Enter the **Year** the 940 information is requested for. Click **Search**.
4. The **940 Certification Search Results** page appears, displaying the summary of Massachusetts taxable wages reported by the Employer for the designated year.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Request for 940 Certification

Summary of Massachusetts taxable wages reported by this employer and the total amount of FUTA eligible Massachusetts tax paid into the Massachusetts UI Fund for a designated year. This information is reported to the IRS and indicates the amounts to be reported on the Federal Form 940 (non-domestic employer).

The FUTA Credit may also be referred to or used in conjunction with the following terms or forms:

- Employer's Annual Federal Unemployment (FUTA) Tax Return
- Employer Account Abstract
- Federal Form 940
- Federal Form 940C
- Proof of Credit
- Re-Certification of UI Taxes

Search Year

Year: 2010 *

Search Reset

940 Certification Search Results

Subject Date:	1/1/1983
Suspense Date:	
Date of Recertification:	7/18/2011
Year of Recertification:	2010
State:	Massachusetts
Employer Name:	[redacted]
Address:	[redacted]
Employer Account Number (EAN):	[redacted]
Federal Employer Identification Number (FEIN):	[redacted]
2010 Massachusetts UI Taxable Wages :	$97,300.38
2010 Massachusetts Taxable Wage Base (effective 1/1/2010):	$14,000.00
Massachusetts UI Contribution Rate:	1.26%
Taxes Paid Prior To 2/1/2011:	$1,225.98
Taxes Paid 2/1/2011 to 2/10/2011:	$0.00
Taxes Paid After 2/10/2011:	$0.00

For an unofficial copy of this re-certification, print this screen. If you have any questions about these results, contact DUA at (617)-626-6896.

Next

5. Print this page if you want an unofficial copy before the request is complete. Click **Next**.

   NOTE: The only address that prints on the unofficial copy is the Employer address on file. You can add additional addresses for the official mailing in **Step 6**.

6. Enter additional addresses to which the official 940 Certification correspondence should be sent (if any). Put a check in the **Mail to** box for each address, and click **Submit**.

940 Certification Search Results

Subject Date:	1/1/1983
Suspense Date:	
Date of Recertification:	7/18/2011
Year of Recertification:	2010
State:	Massachusetts
Employer Name:	[redacted].
Address:	[redacted]
Employer Account Number (EAN):	[redacted]
Federal Employer Identification Number (FEIN):	[redacted]
2010 Massachusetts UI Taxable Wages :	$97,300.38
2010 Massachusetts Taxable Wage Base (effective 1/1/2010):	$14,000.00
Massachusetts UI Contribution Rate:	1.26%
Taxes Paid Prior To 2/1/2011:	$1,225.98
Taxes Paid 2/1/2011 to 2/10/2011:	$0.00
Taxes Paid After 2/10/2011:	$0.00

Addresses

An official copy of the re-certification will be sent to the employer's mailing address. To send additional official copies of the re-certification enter the address information below:

☐ Mail to:

Attention:	
Address Line 1:	
Address Line 2:	
City:	
State:	MA - Massachusetts
Zip Code:	

☐ Mail to:

Attention:	
Address Line 1:	
Address Line 2:	
City:	
State:	MA - Massachusetts
Zip Code:	

Previous Submit

7. A confirmation appears. The request is complete.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Confirmation

The official re-certification correspondence has been submitted.

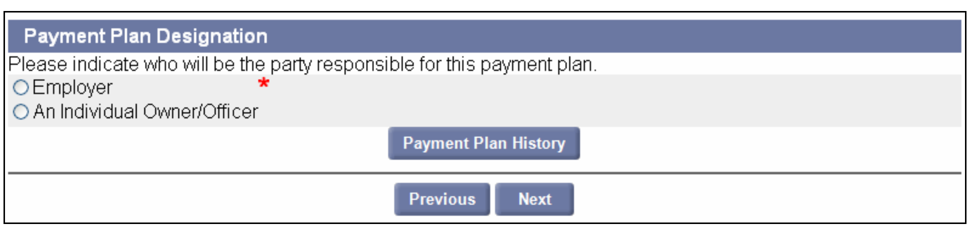
REQUEST PAYMENT PLAN

Introduction	This section describes how to submit a request for a payment plan. If an Employer has outstanding debt and is unable to pay the full amount due, the Employer can request for a payment plan. This will allow the Employer to pay the debt in installments, though interest will continue to accrue. Upon submission of the request, authorized DUA staff will review the payment plan and approve or deny the request and you will be notified of the decision. **NOTE**: If you participate in a payment plan, you **cannot** use the deferral option.

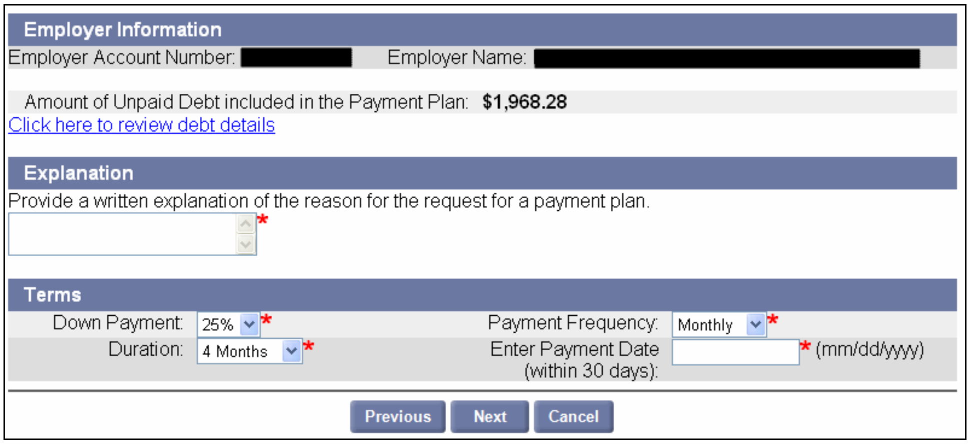
Requesting a Payment Plan

1. Follow the steps in the section, *Navigating to Payment Information*.
2. Click **Request Payment Plan**.
3. The **Payment Plan History** page appears. Click **New**.

4. The **Payment Plan Designation** page appears. Select the party responsible for the payment plan, and click **Next**.



5. The **Explanation** page appears. Enter an explanation for the payment plan request and specify the payment terms. Click **Next**.


Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Amount of Unpaid Debt included in the Payment Plan: **$1,968.28**

Click here to review debt details

Explanation

Provide a written explanation of the reason for the request for a payment plan.

*

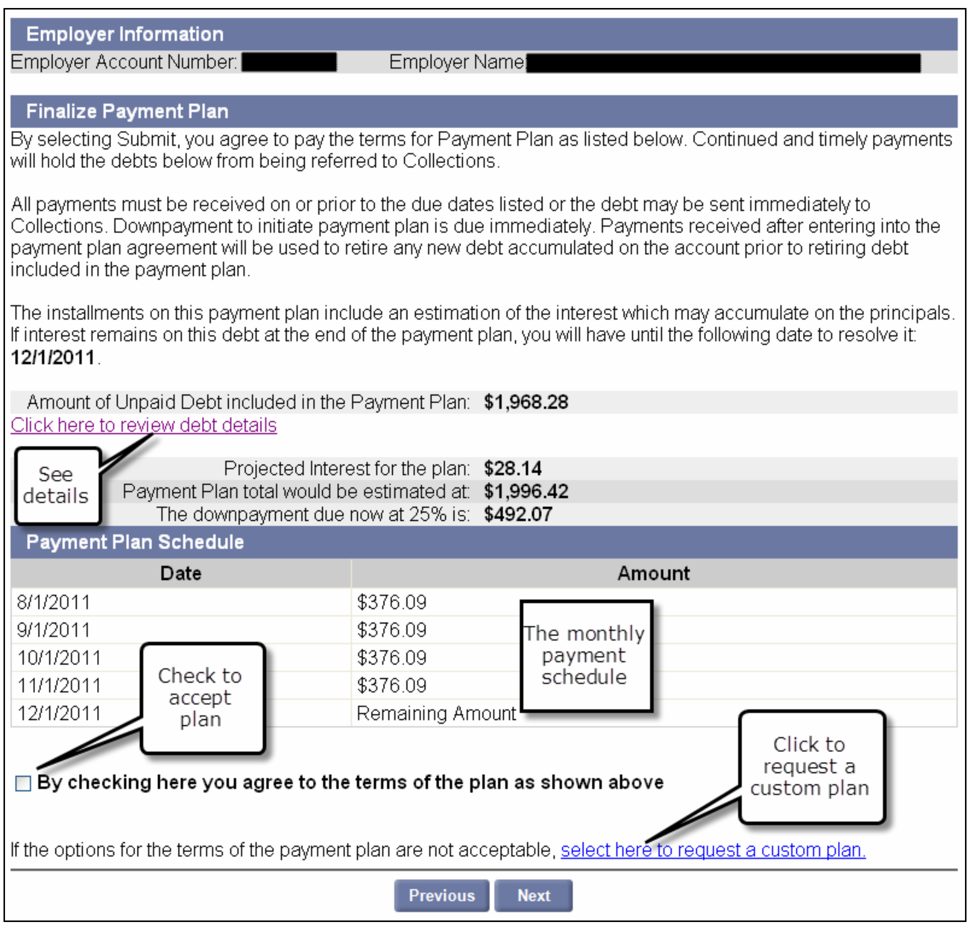
Terms

Down Payment: 25% * Payment Frequency: Monthly *

Duration: 4 Months * Enter Payment Date (within 30 days): * (mm/dd/yyyy)

Previous Next Cancel

6. The **Payment Plan** page appears. To accept the plan, check the box and click **Next**. To request a custom plan, click the **custom plan** link.


Employer Information

Employer Account Number: [redacted] Employer Name [redacted]

Finalize Payment Plan

By selecting Submit, you agree to pay the terms for Payment Plan as listed below. Continued and timely payments will hold the debts below from being referred to Collections.

All payments must be received on or prior to the due dates listed or the debt may be sent immediately to Collections. Downpayment to initiate payment plan is due immediately. Payments received after entering into the payment plan agreement will be used to retire any new debt accumulated on the account prior to retiring debt included in the payment plan.

The installments on this payment plan include an estimation of the interest which may accumulate on the principals. If interest remains on this debt at the end of the payment plan, you will have until the following date to resolve it: **12/1/2011**.

Amount of Unpaid Debt included in the Payment Plan: **$1,968.28**

Click here to review debt details

Projected Interest for the plan: **$28.14**

Payment Plan total would be estimated at: **$1,996.42**

The downpayment due now at 25% is: **$492.07**

Payment Plan Schedule

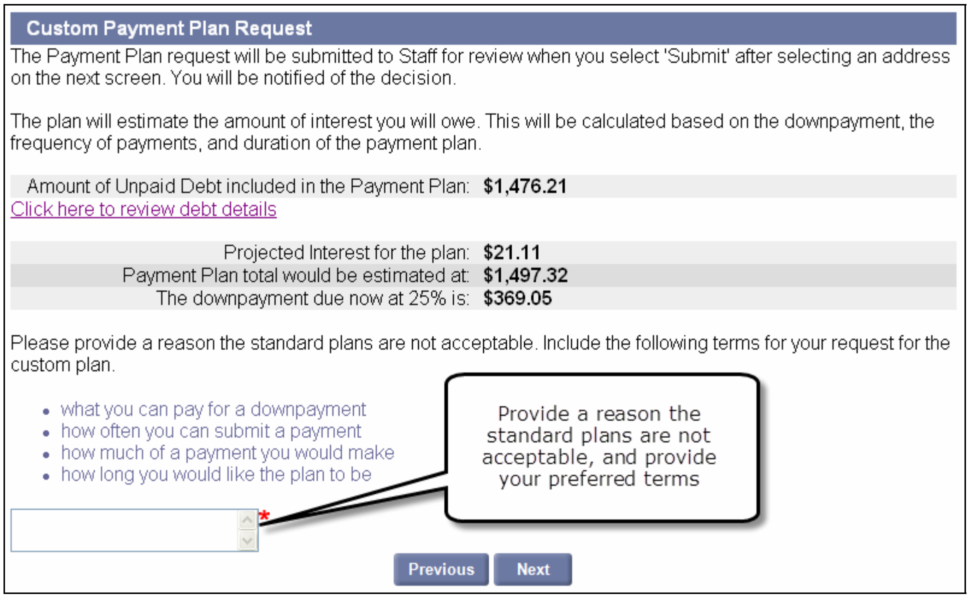
Date	Amount
8/1/2011	$376.09
9/1/2011	$376.09
10/1/2011	$376.09
11/1/2011	$376.09
12/1/2011	Remaining Amount

By checking here you agree to the terms of the plan as shown above

If the options for the terms of the payment plan are not acceptable, select here to request a custom plan.

Previous Next

7. If you requested a standard plan, skip to **Step 8**. If you requested a custom plan, the **Custom Payment Plan Request** page appears. Provide a reason that the standard plans are not acceptable, and detail your terms. Click **Next**.



8. The **Address Details** page appears displaying the Legal and Physical addresses. Add any additional addresses to which the Payment Plan Agreement should be mailed. Click the radio button for each address. Click **Submit**.

9. The **Payment Plan Request Confirmation** page appears. Proceed according to whether you requested a standard or a custom plan.

   Standard Plan: Click **Make Payment**. See the section, *Making a Payment* for instructions.

Payment Plan Request Confirmation

Payment Plan Request Number 522 has been submitted. To activate the payment plan the downpayment must be received. Based upon completion of the plan requirements the following terms will apply.

Date Requested:	7/19/2011	Requested By:	[redacted]
Payment Plan first payment:	8/1/2011	Payment Plan first payment:	$376.09
Payment Plan completion:	12/1/2011	Downpayment amount:	$492.07

To activate the payment plan, the downpayment must be paid. Please select 'MAKE PAYMENT' now.

Make Payment

   Custom Plan: No **Make a Payment** button appears. Wait until you have been contacted by DUA to make a payment.

Payment Plan Request Confirmation

Payment Plan Request Number 523 has been submitted. To activate the payment plan the downpayment must be received. Based upon completion of the plan requirements the following terms will apply.

Date Requested:	7/19/2011	Requested By:	[redacted]
Payment Plan first payment:	8/1/2011	Payment Plan first payment:	$282.07
Payment Plan completion:	12/1/2011	Downpayment amount:	$369.05

Staff will review your request and notify you of a decision.

Viewing a Payment Plan History

1. Follow the steps in the section, *Navigating to Payment Information*.
2. Click **Request Payment Plan**.
3. The **Payment Plan History** page appears. Click a **Payment Plan Number**.

Employer Information

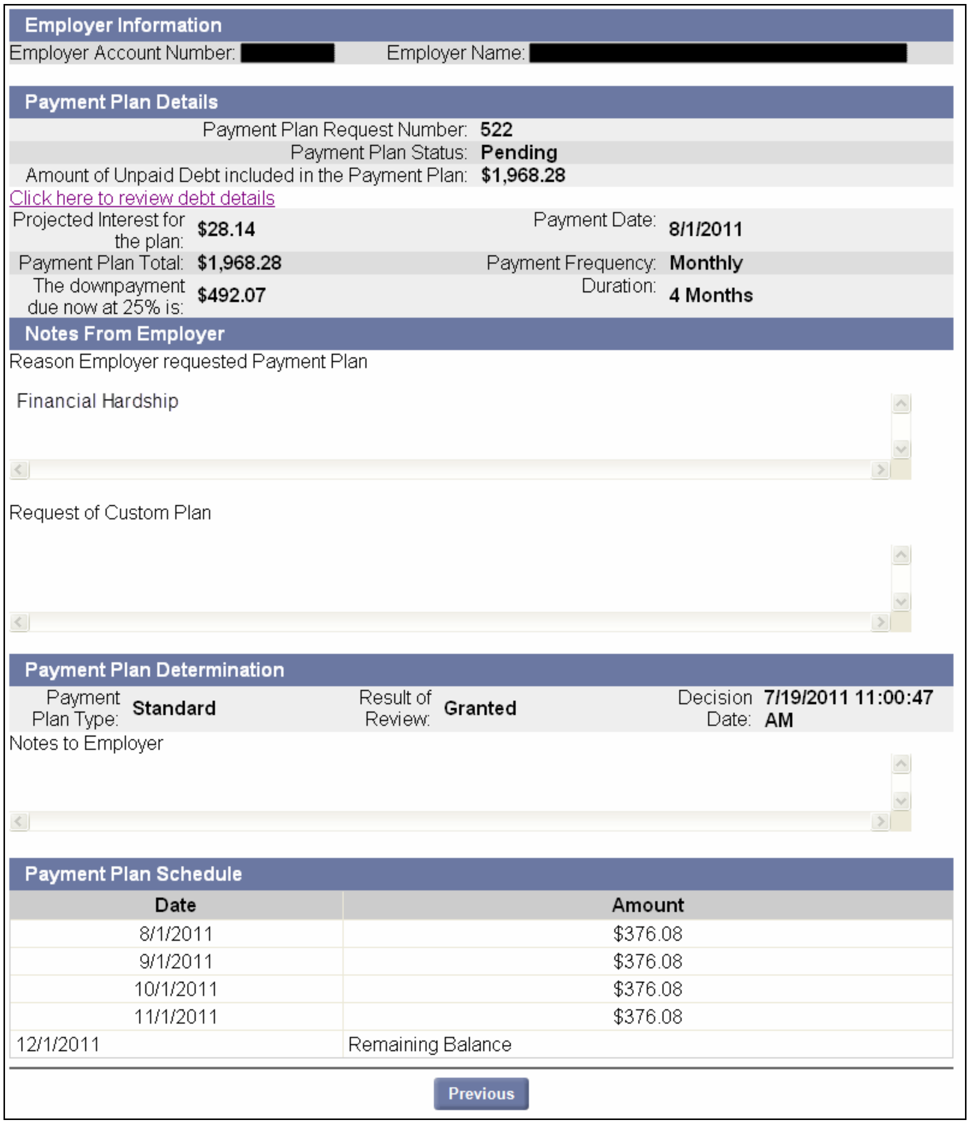
Employer Account Number: [redacted] Employer Name: [redacted]

Payment Plan History

Payment Plan Number	Payment Plan Request Date	Requested By	Payment Plan Type	Result of Review	Decision Date	Amount	Payment Plan Status
523	7/19/2011	[redacted]	Custom	In Review	7/19/2011	$1,476.21	In Review
522	7/19/2011	[redacted]	Standard	Granted	7/19/2011	$1,968.28	Revised

Previous New

4. The **Payment Plan Details** page appears. The page displays information including status, interest projections, due date, notes, and a schedule.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Payment Plan Details

Payment Plan Request Number: **522**

Payment Plan Status: **Pending**

Amount of Unpaid Debt included in the Payment Plan: **$1,968.28**

Click here to review debt details

Projected Interest for the plan:	**$28.14**	Payment Date:	**8/1/2011**
Payment Plan Total:	**$1,968.28**	Payment Frequency:	**Monthly**
The downpayment due now at 25% is:	**$492.07**	Duration:	**4 Months**

Notes From Employer

Reason Employer requested Payment Plan

Financial Hardship

Request of Custom Plan

Payment Plan Determination

Payment Plan Type:	**Standard**	Result of Review:	**Granted**	Decision Date:	**7/19/2011 11:00:47 AM**

Notes to Employer

Payment Plan Schedule

Date	Amount
8/1/2011	$376.08
9/1/2011	$376.08
10/1/2011	$376.08
11/1/2011	$376.08
12/1/2011	Remaining Balance

Previous

User Maintenance

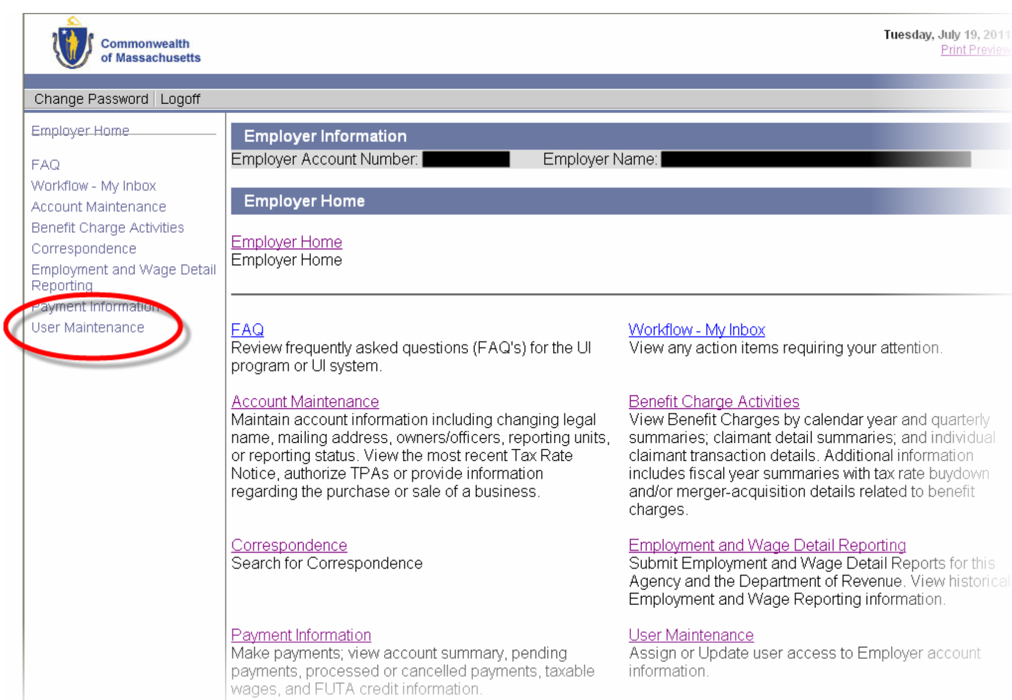
ABOUT USER MAINTENANCE

Introduction	This section describes how **Employer System Administrators** can manage user access to the Employer account. The person who completes the Employer Registration or Account Activation is assigned the Employer System Administrator role by default. This user receives login credentials to access the QUEST self – service account during the registration or activation session. The system administrator can in turn create accounts for other users and assign roles to those users. Role assignments dictate which functions users can perform. The activities that are described in this section include: • Creating a new user • Searching for user details • Modifying user information • Assigning user roles • Resetting user passwords • Inactivating a user account • Reinstating a user account

NAVIGATING TO USER MAINTENANCE

To navigate to **User Maintenance**, perform the following steps:

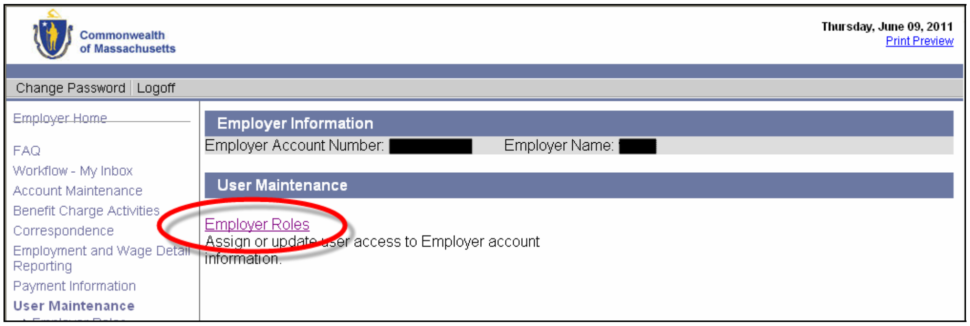
1. Log in to QUEST. Click the **User Maintenance** link in the left pane (the link also appears on the main pane of the Employer Home page).



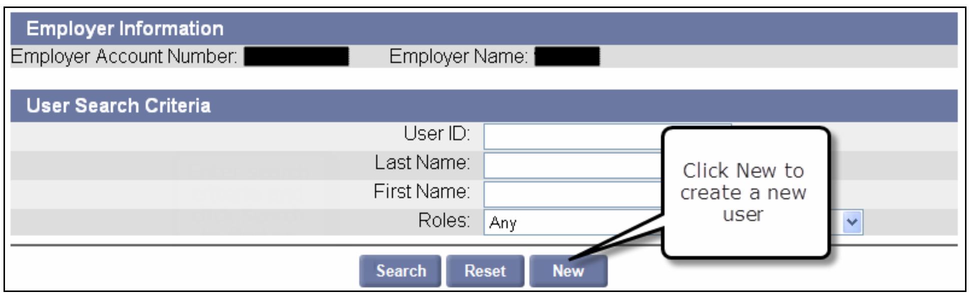
2. The **User Maintenance** page appears.

CREATING A NEW USER

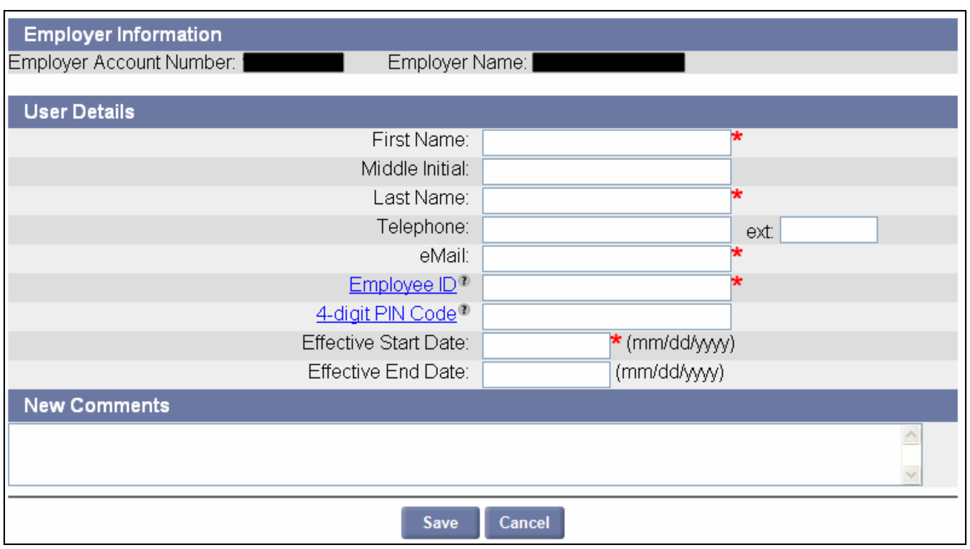
1. Click **User Maintenance**.
2. Click **Employer Roles**.



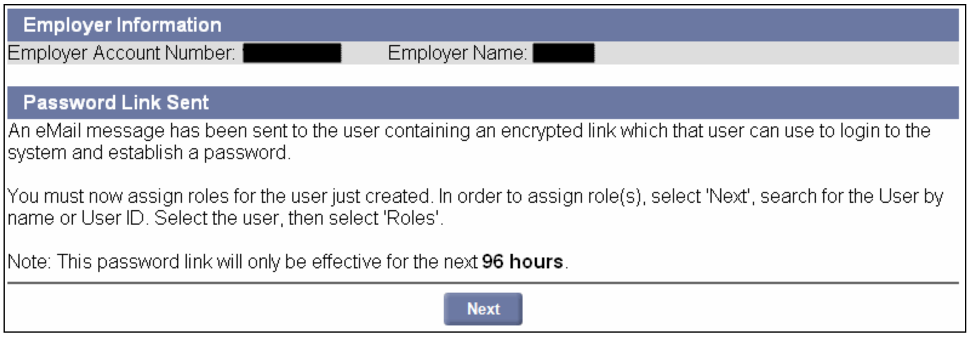
3. The **User Search Criteria** page appears. Click **New**.



4. The **User Details** page appears. Enter information about the user. Fields with an asterisk are required. Click **Save**.



5. The **Password Link Sent** page appears. Click **Next** to return to the **User Search Criteria** page.



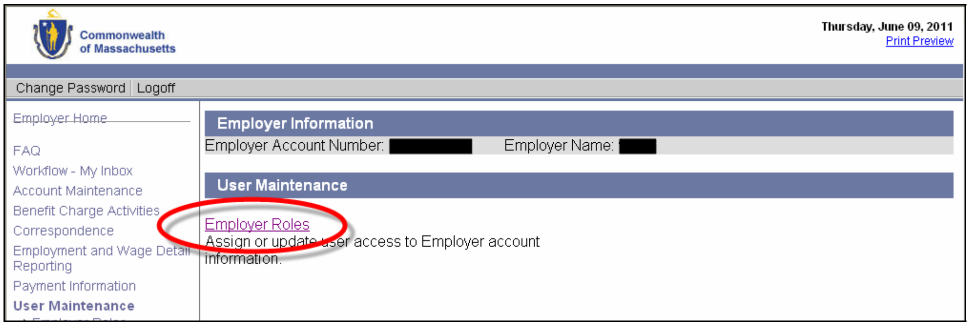
NOTE: When you create a new user, the system generates an email message to that user. The message contains a link. When the user clicks the link, a browser launches with a special login page. The user enters a Password of their choosing, selects a security question, answers the security question, and sets a PIN from this page.

6. Before the user can access any functions in QUEST, you must assign them roles. See the section, *Assigning User Roles*.

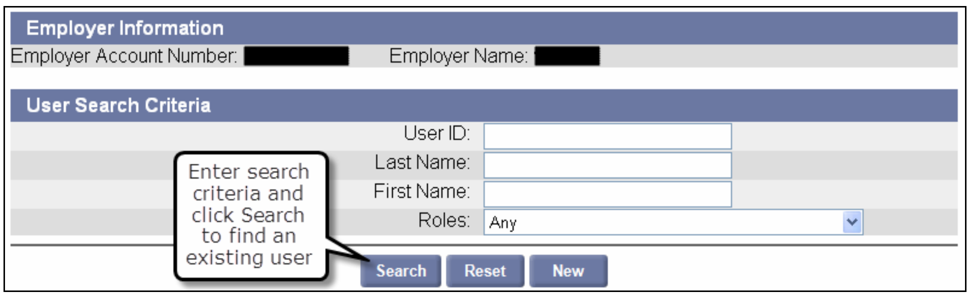
SEARCHING FOR USER DETAILS

1. Click **User Maintenance**.

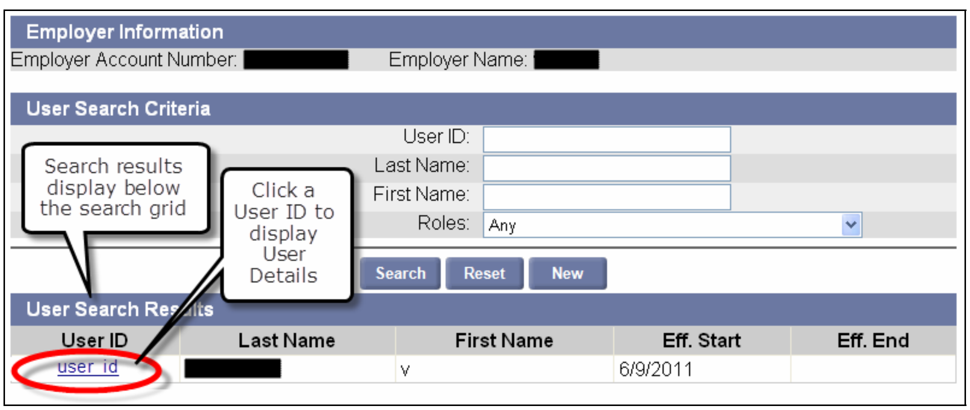
2. Click **Employer Roles**.



3. The **User Search Criteria** page appears. Enter search criteria (or leave blank to return all users) and click **Search**.



4. The search results display below the search grid. Click a **User ID** to display user details.



5. The **User Details** page appears.

Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

User Details

User Type:	**Employer**
User ID:	[redacted]
First Name:	[redacted]
Middle Initial:	
Last Name:	[redacted]
Telephone:	[redacted]
eMail:	[redacted]
Employee ID	[redacted]
PIN Code	**1234**
Effective Start Date:	**8/2/2011**
Effective End Date:	
Last Logged On:	**8/10/2011**
Incorrect Password Attempts:	**0**
Account Status:	**Active**
Security Question:	**What is your father's middle name?**
Security Answer:	**Fred**

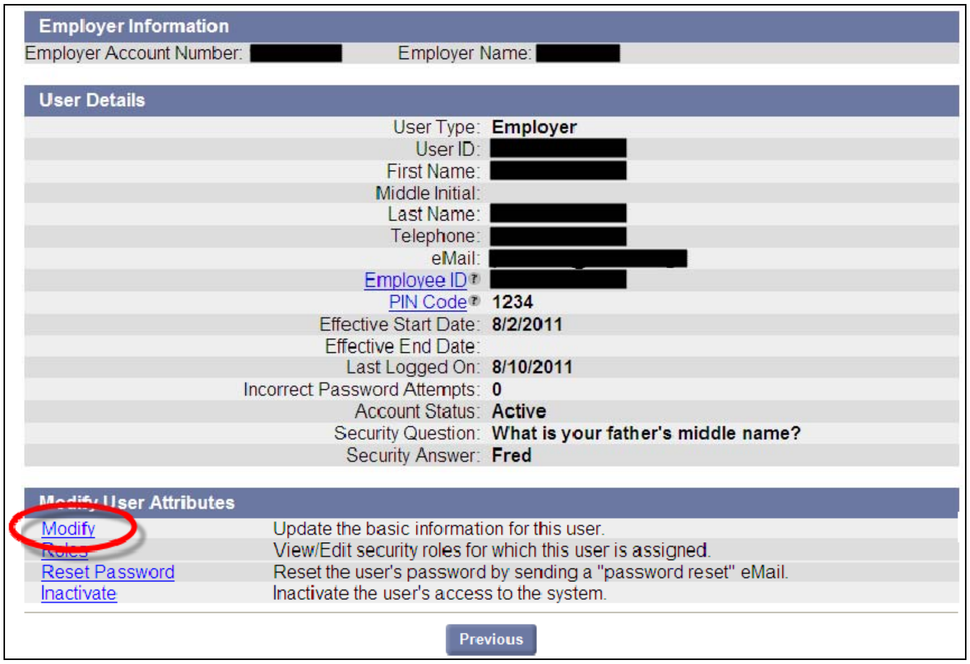
Modify User Attributes

Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.

Previous

MODIFYING USER INFORMATION

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Modify**.


Employer Information
Employer Account Number: [redacted] Employer Name: [redacted]

User Details

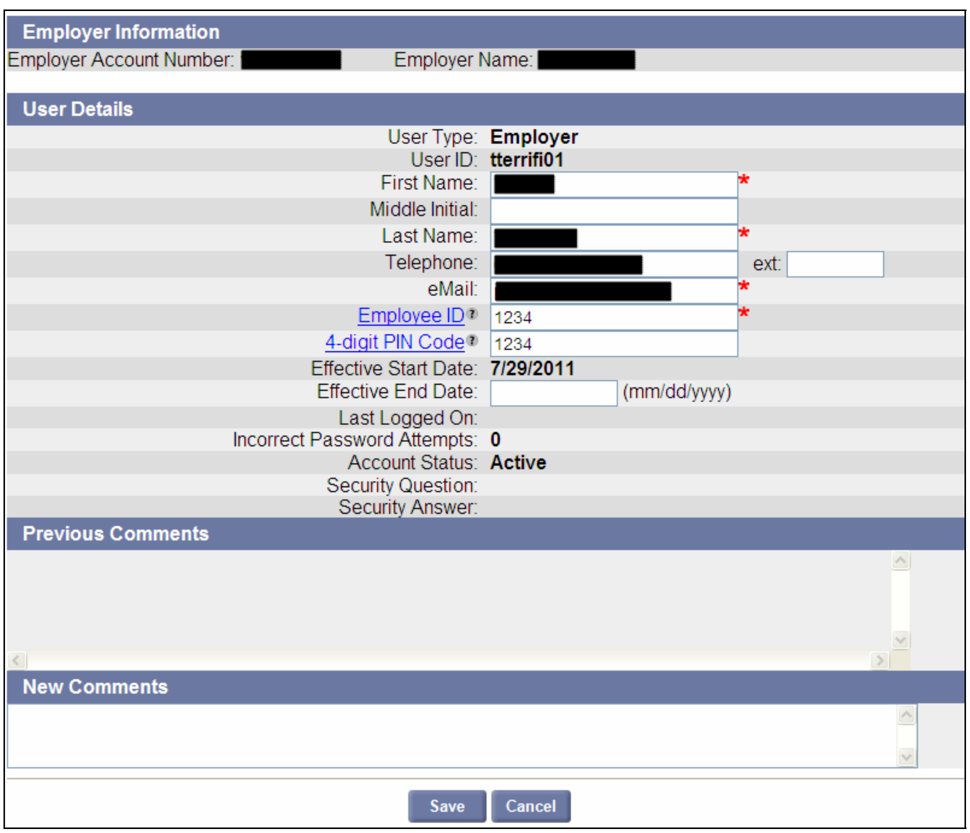
User Type:	Employer
User ID:	[redacted]
First Name:	[redacted]
Middle Initial:	
Last Name:	[redacted]
Telephone:	[redacted]
eMail:	[redacted]
Employee ID	[redacted]
PIN Code	1234
Effective Start Date:	8/2/2011
Effective End Date:	
Last Logged On:	8/10/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Fred

Modify User Attributes

Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.

Previous

3. An editable version of the **User Details** page appears. Add or edit information and click **Save**.


Employer Information
Employer Account Number: [redacted] Employer Name: [redacted]

User Details

User Type:	Employer
User ID:	tterrifi01
First Name:	[redacted] *
Middle Initial:	
Last Name:	[redacted] *
Telephone:	[redacted] ext:
eMail:	[redacted] *
Employee ID	1234 *
4-digit PIN Code	1234
Effective Start Date:	7/29/2011
Effective End Date:	(mm/dd/yyyy)
Last Logged On:	
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	
Security Answer:	

Previous Comments

New Comments

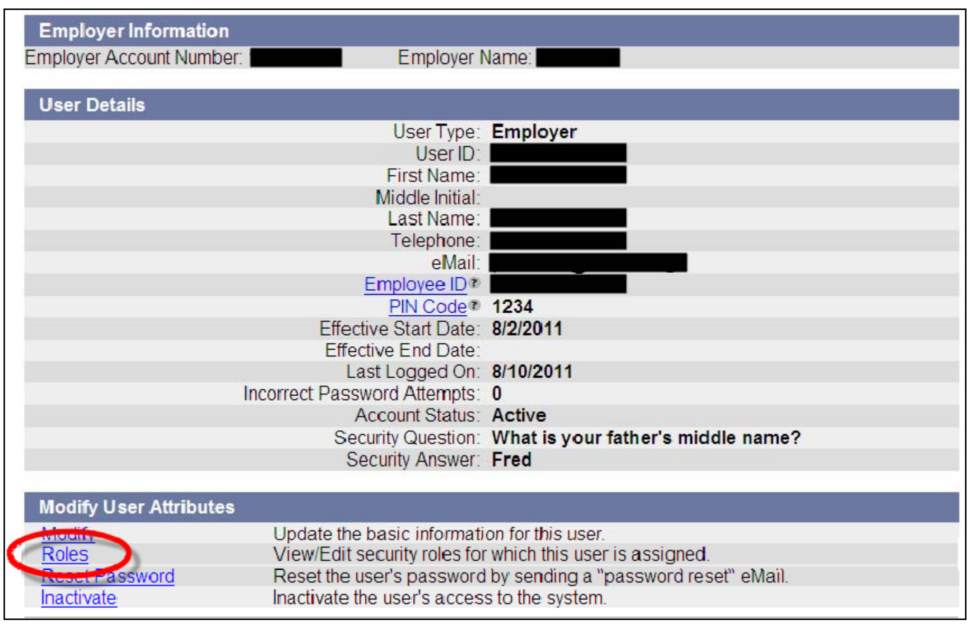
Save Cancel

ASSIGNING USER ROLES

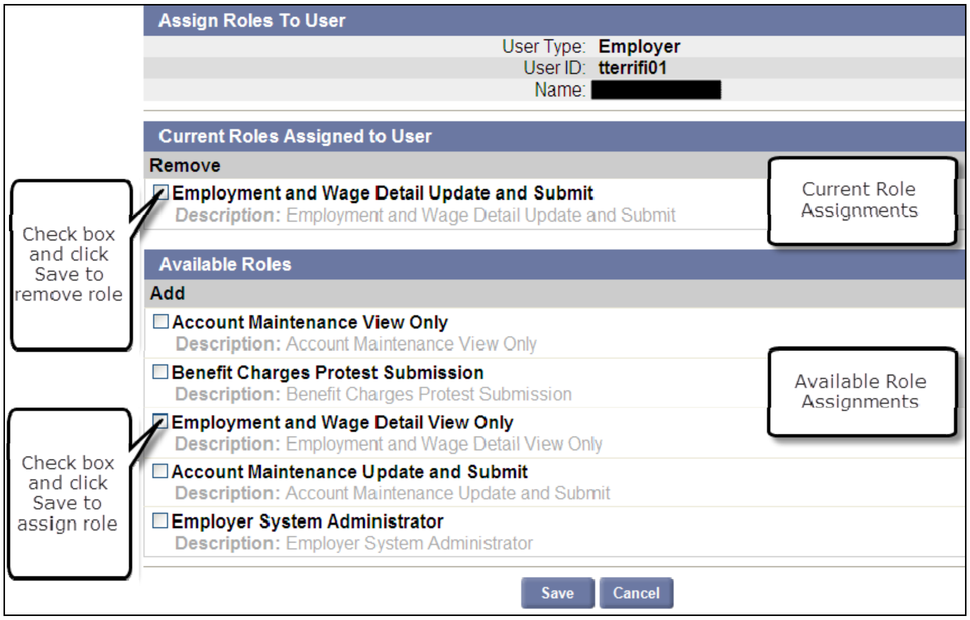
Introduction	The specific functions a user can perform are dictated by the user's role assignments. For example, a user with the role **Employment and Wage Detail View Only** can view employment and wage detail transactions, but cannot submit employment and wage detail reports. Roles assignments include: • Account Maintenance Update and Submit • Account Maintenance View Only • Benefit Charges Protest Submission • Benefit Charge View Only • Employment and Wage Detail Update and Submit • Employment and Wage Detail View Only • Employer System Administrator

To assign or change role assignments, follow these steps.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Roles**.



3. The **Assign Roles** page appears. Check roles in the **Current Roles Assigned to User** area to flag them for removal. Check roles in the **Available Roles** area to flag them for assignment. Click **Save**.



RESETTING USER PASSWORDS

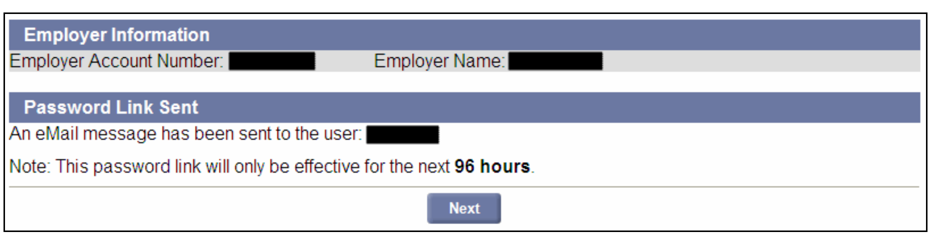
When you a user's password, an email message is automatically sent to the user. The message contains a link; when the user clicks the link, a browser is launched in which the user can reset the password.

Follow these steps to begin the reset password process.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Reset Password**.

3. The **Reset Password** page appears, requesting confirmation that you wish to reset the password. Click **Confirm** to continue.

4. The **Password Link Sent** page appears. Click **Next** to return to the **User Details** page.



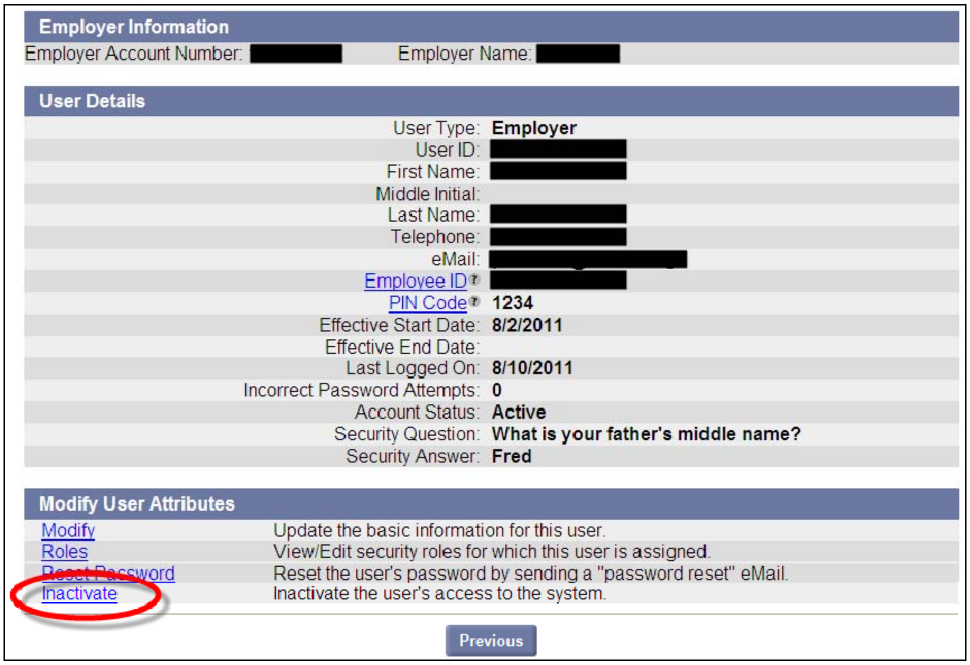
NOTE: Until the user follows the link to reset their password, their account access remains blocked.

NOTE: The password link is only active for 96 hours.

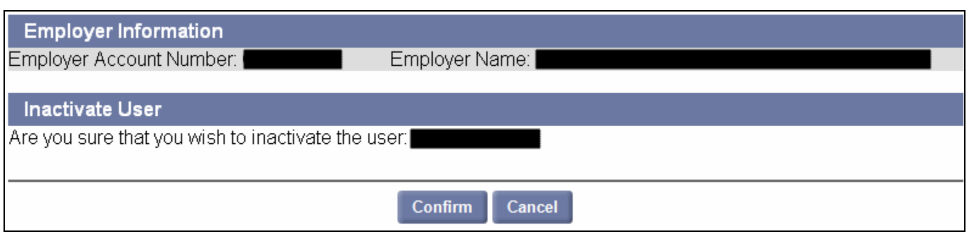
INACTIVATING A USER ACCOUNT

Follow these steps to inactivate a user's account.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Inactivate**.



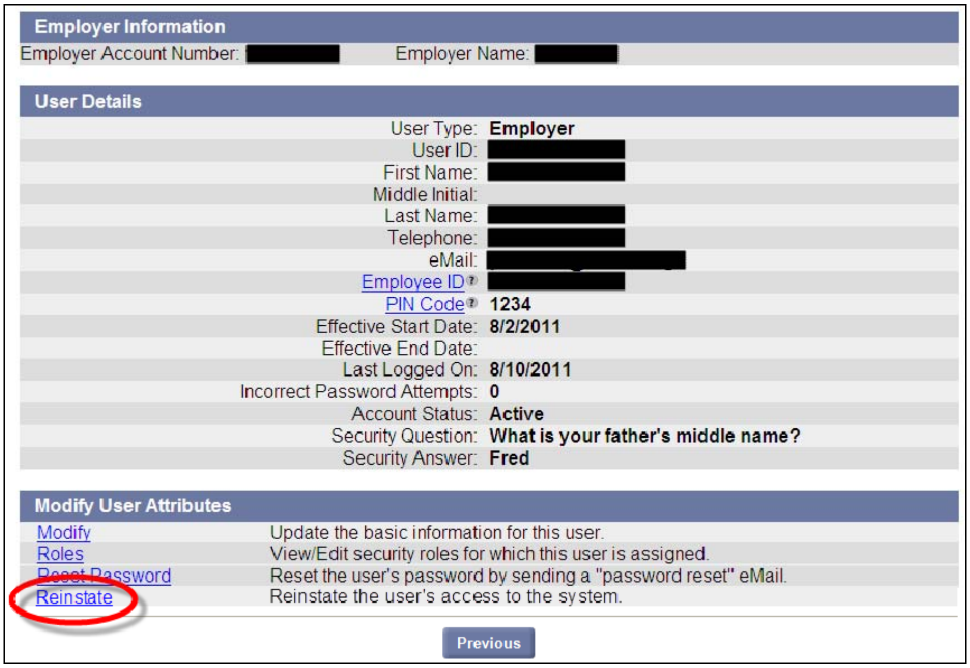
3. The **Inactivate User** page appears. Click **Confirm**.



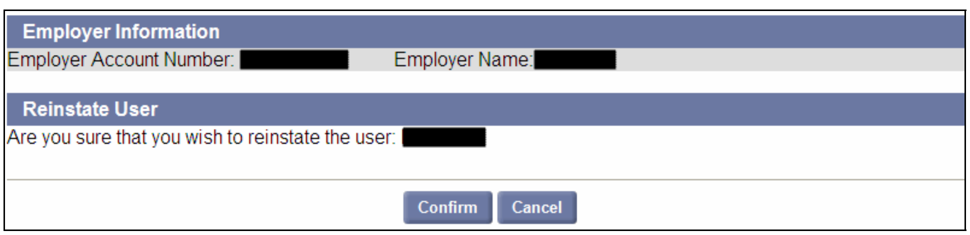
REINSTATING A USER ACCOUNT

Follow these steps to reinstate a user's account.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Reinstate**.



3. The **Reinstate User** page appears. Click **Confirm**.



Correspondence

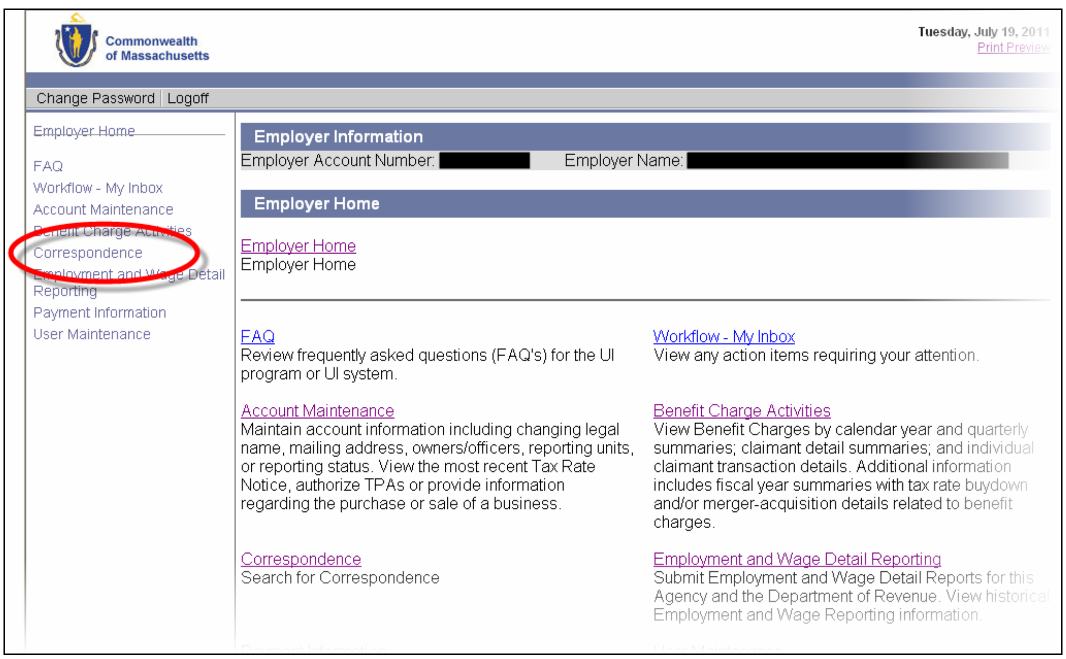
ABOUT CORRESPONDENCE

Introduction	This section describes how to search for and view correspondence sent from DUA to the Employer account on the QUEST system. **NOTE**: There are two methods of correspondence available: **Email** and **US Mail**. You will be able to search for and view correspondence sent to your account in QUEST, regardless of your chosen correspondence preference method. If your preference is Email, you will receive a notification to your email address that a correspondence is available for your review. You must login to the QUEST system to view the correspondence. **NOTE**: To set up your preference for correspondence method see the section, *Viewing or Modifying Correspondence Preference* (in the *Address Information* section of the *Account Maintenance* chapter). **NOTE**: You must have Adobe Reader software installed to view the correspondence. This software can be downloaded for free from www.adobe.com

NAVIGATING TO CORRESPONDENCE

To navigate to **Correspondence**, perform the following steps:

1. Log in to QUEST. Click the **Correspondence** link in the left pane (the link also appears on the main pane of the Employer Home page).

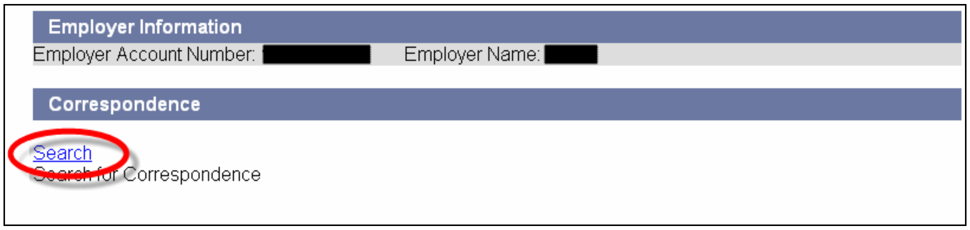


2. The **Correspondence** page appears.

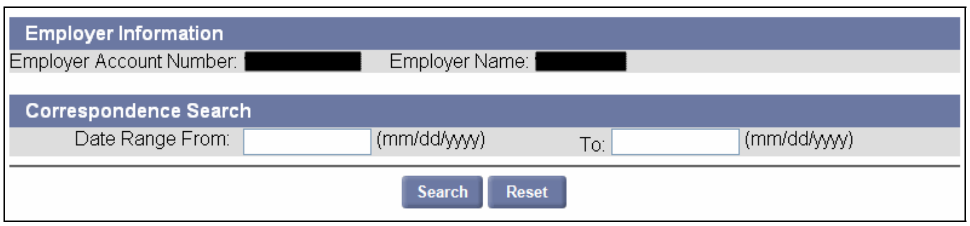
SEARCHING FOR CORRESPONDENCE

Search for correspondence by performing the following steps:

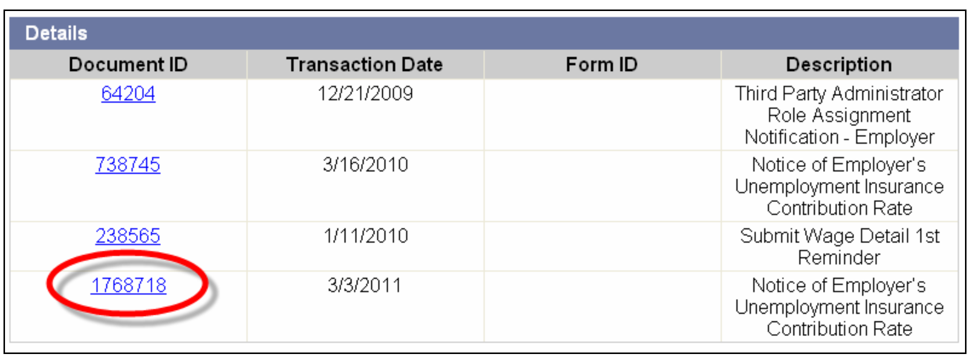
1. Log in to QUEST and click **Correspondence**.
2. Click **Search**.



3. The **Correspondence Search** page appears. Enter **Date Range From** and **To** dates. Click **Search**.



4. The search results appear in the **Details** area below the search grid. Click a **Correspondence Number** to display a PDF version of the actual correspondence in Acrobat Reader.



Details

Document ID	Transaction Date	Form ID	Description
64204	12/21/2009		Third Party Administrator Role Assignment Notification - Employer
738745	3/16/2010		Notice of Employer's Unemployment Insurance Contribution Rate
238565	1/11/2010		Submit Wage Detail 1st Reminder
1768718	3/3/2011		Notice of Employer's Unemployment Insurance Contribution Rate

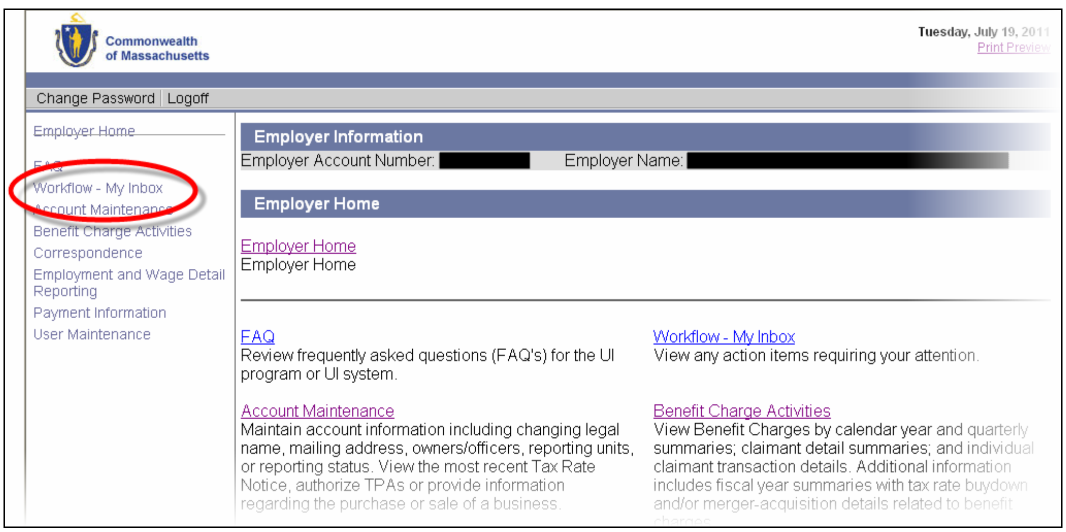
Workflow

ABOUT WORKFLOW - MY INBOX

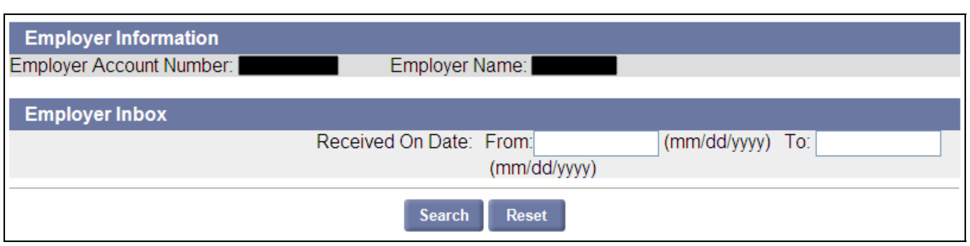
Introduction	The **Workflow - My Inbox** feature allows you to view and respond to Questionnaires sent to you by the DUA. In certain cases, the DUA may choose to send you a questionnaire to seek additional information from you. For example, if you have filed an appeal, DUA may need additional information to process your appeal and will send you a questionnaire. If your correspondence method is **Email**, you will receive a questionnaire in your **QUEST inbox**. This section of the document describes how to view and respond to the questionnaires received on QUEST.

NAVIGATING TO WORKFLOW - MY INBOX

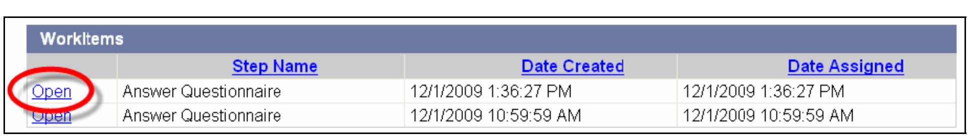
1. Log on to QUEST. Click the **Workflow – My Inbox** link in the left pane (the link also appears on the main pane of the Employer Home page).



2. The **Employer Inbox** page appears. Enter **Received On Date From** and **To** dates. Click **Search**.

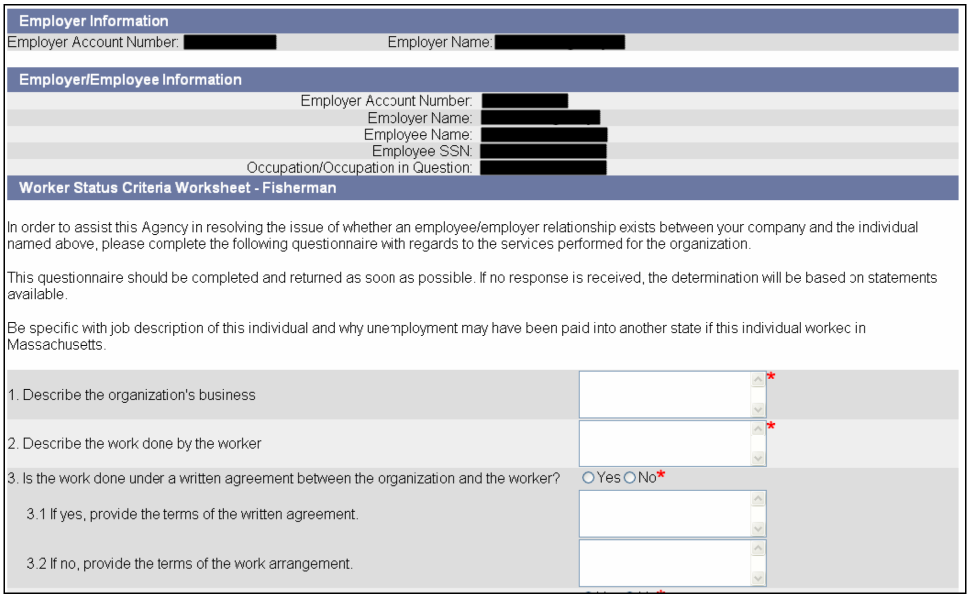


3. The search results appear below the search grid in the **Workitems** area. Click the **Open** link for a specific **Step Name** item to access the questionnaire.



4. The questionnaire appears. Provide your responses and click **Submit.** Your response will be sent to DUA.

Questionnaire Example: Worker Status Criteria Worksheet – Fisherman.



Employer Information

Employer Account Number: [redacted] Employer Name: [redacted]

Employer/Employee Information

Employer Account Number: [redacted]
Employer Name: [redacted]
Employee Name: [redacted]
Employee SSN: [redacted]
Occupation/Occupation in Question: [redacted]

Worker Status Criteria Worksheet - Fisherman

In order to assist this Agency in resolving the issue of whether an employee/employer relationship exists between your company and the individual named above, please complete the following questionnaire with regards to the services performed for the organization.

This questionnaire should be completed and returned as soon as possible. If no response is received, the determination will be based on statements available.

Be specific with job description of this individual and why unemployment may have been paid into another state if this individual worked in Massachusetts.

1. Describe the organization's business *
2. Describe the work done by the worker *
3. Is the work done under a written agreement between the organization and the worker? Yes No *
   3.1 If yes, provide the terms of the written agreement.
   3.2 If no, provide the terms of the work arrangement.

Abbreviations

DUA	Department of Unemployment Assistance
DOR	Department of Revenue
FEIN	Federal Employer Identity Number
LLC	Limited Liability Company
MA	Massachusetts
QUEST	Quality Unemployment System Transformation
SSN	Social Security Number
TPA	Third Party Administrator
UI	Unemployment Insurance
UHI	Unemployment Health Insurance

Addendum

A. HOURS WORKED GUIDELINE

How do I report hours worked? General Rule:

1. If the Employer knows the actual number of hours worked, the Employer should report that figure.

2. If the Employer does not know the actual number of hours worked, the Employer should:

A. for full-time employees use 40 hours per week.

B. for part-time employees, Employer should estimate the number of hours.

C. for full-time plus, Employer should use 40 hours per week plus an estimate.

Overtime:

The Employer should report the number of hours actually worked for which overtime pay or compensatory time is paid without regard for the overtime pay rate. Compensatory time should be reported when taken, not when earned.

Fractions of hours:

If the employee's total number of hours in a quarter results in a fractional amount, the total figure should be rounded to the nearest whole hour. If the fraction is "1/2 hour" or more it should be rounded up to the next whole hour, and if it's less than a 1/2 hour, it should be rounded down.

Vacation / sick / holiday pay:

The actual number of hours for which an employee receives vacation, sick or holiday pay should be reported. Vacations, sick days and Holidays without pay should not be counted as hours worked.

On call:

Hours in which the employee is carrying a pager, or is otherwise "on call" should not be included in the "hours worked" calculation.

Employees not paid by the hour:

These include salaried workers and those paid by commission. Also included are workers who are paid by the mile, by piecework, by the acre, by the payload, by reductions in rent, or other non-hourly rates. When the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at the rate of 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Wages paid less than once per quarter:

This will occur most often with corporate officers who are paid only once or twice a year. The Employer should report the number of hours worked in any quarter in which no wages were paid, along with $0 wages. Then, when wages or salaries are finally paid, only the hours worked in that specific quarter should be reported. If the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Faculty members of colleges and universities (includes technical and community colleges):

If the faculty member is considered to be a full-time employee, 40 hours per week paid should be reported. If the faculty member is considered to be part-time, an estimate of the actual hours worked should be made.

School teachers

When teachers or other staff work nine months but are paid over 12 months, their hours should be reported in the quarters that they actually work. For part-time faculty, coaches, etc., if hours are not known, Employers may establish an hourly rate of pay and divide that into quarterly gross wages to obtain an estimate of hours.

Volunteer Firefighters:

Employers can establish an hourly rate of pay and divide that amount into the quarterly gross wages to obtain an estimate of hours.

B. EMPLOYMENT AND WAGE DATA SUBMISSION GUIDELINES AND INFORMATION

This is a document available at the DUA QUEST website, providing extensive detail for processing Employment and Wage data through the new QUEST System. This document focuses on process flows, key business rules and changes, and provides Employers and TPAs the contact information necessary to make the necessary preparations for change. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

C. ICESA FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating ICESA Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

D. EFW2 FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating EFW2 Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

E. DELIMITED FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating Delimited Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

F. WAGE DETAIL FILE UPLOAD TROUBLESHOOTING

Use these general pointers if you are having trouble uploads, or data from uploads does not seem to be handled correctly by the system.

- •When wage detail information seems to have imported or calculated incorrectly, many times it is due to an incorrect employee SSN in a wage filing.
  - Always check for typos in SSNs first when reviewing data for problems.
  - For delimited file uploads, always verify that the cells in the delimited file had the right number format. Many cells are formatted as 'Text' expressly to handle data (like SSNs and zip codes) beginning with '0'.
- •File uploads are rejected outright if:
  - The Employer Account Number (EAN) is not included in the file name.
  - 25% or more of the errors with the file are fatal errors.

G. LIST OF ERRORS DURING EMPLOYMENT AND WAGE DETAIL UPLOAD

Element: Scenario Description	**Record:** *Specific Line within a File*	**Edit/Error Message:**	**Error Code**	**Notes/Business Rules**
Employer Account Number: Missing Account Number in Employer or TPA Submission	Fatal	Missing Employer Account Number	error.missing.ean	If a file is submitted without an employer account number or an invalid account number, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to the non filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number -	Fatal	Invalid Employer Number – Quarter/Year Not Open	error.invalid.ean	If a file is submitted with an EAN for an employer and the quarter and year for the submission is prior to the subjectivity date for that employer, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to a non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).

Element: Scenario Description	**Record:** *Specific Line within a File*	**Edit / Error Message:**	**Error Code**	**Notes / Business Rules**
Employer Account Number: Invalid Employer Account Number (this includes alphanumeric invalidity) in Employer or TPA Submission	Fatal	Invalid Employer Number – incorrect format	error.invalid.ean	If a file is submitted with an invalid account number, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number – Does not Exist in Employer or TPA Submission	Fatal	Invalid Employer Number – Does not Exist	error.invalid.ean	If a file is submitted with an employer account number that does not exist, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number – Not Authorized to submit for EAN for TPA submissions	Fatal	Invalid Employer Number -– Not Authorized to submit for EAN	error.invalid.ean	Based on TPA Submissions: If a file is submitted with an employer account number for which the TPA is not authorized to submit, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to them and authorize the TPA for the 'submit' functional role; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
TPA ID: Not Authorized – TPA has Delinquent Debt	Fatal	Invalid TPA ID – Not Authorized – TPA has Delinquent Debt	Error.invalid.TPA.DelinquentDebt	The System must reject employment and wage detail submitted by TPAs on behalf of employers if the TPA has delinquent debt of $1,000 or more (See use case: Establish Delinquent Debt).
TPA ID: Not Authorized – TPA has delinquent employment and wage reports	Fatal	Invalid TPA ID - Not Authorized – TPA has delinquent employment and wage reports	Error.invalid.TPA.DelinquentEmploymentandWageReports	The System must reject employment and wage detail submitted by TPAs on behalf of employers if the TPA is delinquent in filing their employment and wage report for two or more consecutive quarters.

Element: Scenario Description	**Record:** *Specific Line within a File*	**Edit / Error Message:**	**Error Code**	**Notes / Business Rules**
Invalid File – 25% or more record errors	Fatal	Invalid File – 25% or more record errors	Error.invalid.file	The System will reject a file where 25% or greater of the total records have fatal record errors.
Employer Unit ID: Missing Unit Identifier in TPA or Employer Submission	Non-Fatal	Missing Unit Number	error.missing.unitid	The records will be identified as an error, but the employer could note to "Ignore the Errors" and proceed to "Process and Calculate for the online file upload process. System will assign records to the Parent. System will display error message: Missing Reporting Unit on line {0}. If Reporting Unit is not reported, employee data will be processed and associated with the Parent. For FTP the records will be identified as an error and assigned to the Parent.
Employer Unit ID: Invalid Unit Identifier in TPA or Employer Submission	Non-Fatal	Invalid Unit Number	error.invalid.unitid	Invalid records are considered those that do not match the employer's recorded units or include alpha characters. The records will be identified as an error, but the employer could note to "Ignore the Errors" and proceed to "Process and Calculate for the online file upload process. System will assign records to the Parent. For FTP the records will be identified as an error and assigned to the Parent.
SSN: Missing SSN in TPA or Employer Submission, all other information included.	Fatal	Missing Social Security Number	error.missing.ssn	SSN is required field. Records without a SSN will be rejected and not included in calculations.
SSN: Invalid SSN in TPA or Employer Submission, all other information included.	Fatal	Invalid Social Security Number	error.invalid.ssn	Invalid SSNs include alpha-submissions or System identified invalid SSNs. These include: 123456789, 987654321, 000000000, 111111111, 222222222, 333333333, 444444444, 555555555, 666666666, 777777777, 888888888, 999999999, or SSNs with the last four digits as 0000. Must be 9 digits. Records without a valid SSN will be rejected and not included in calculations.
SSN: Duplicate SSN within Unit-EAN in TPA or Employer Submission, all other information included.	Fatal	Duplicate Social Security Number within Unit	error.duplicate.ssn	Duplicate SSN within unit will be rejected and not included in calculations.

Element: Scenario Description	Record: *Specific Line within a File*	Edit / Error Message:	Error Code	Notes / Business Rules
First Name: Missing First Name, all other data available.	Non-Fatal	Missing First Name	error.missing.firstname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed
First Name: Invalid First Name, all other data available.	Non-Fatal	Invalid First Name	error.invalid.firstname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed, and message, "Invalid first name on line {0}. Record contained numeric characters. Names must be alpha. The record will be processed and included in calculations. Missing names may create benefit issues for the employee."
Last Name: Missing Last Name, all other data available.	Non-Fatal	Missing Last Name	error.missing.lastname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed.
Last Name: Invalid Last Name, all other data available.	Non-Fatal	Invalid Last Name	error.invalid.lastname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed and message, "Invalid last name on line {0}. Record contained numeric characters. Names must be alpha. The record will be processed and included in calculations. Missing names may create benefit issues for the employee."
Last Name and First Name: Missing both First and Last Name, but SSN is available.	Non-Fatal	Missing First and Last Name	error.missing.lastname error.missing.firstname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed.
Middle Initial: Invalid/Numeric	Non-Fatal	Numeric Middle Initial	error.invalid.middleinitial	Must be alpha. Or display error message: Invalid middle initial on line {0}. Record contained numeric characters. Names must be alpha. The record will be processed and included in calculations. Missing names may create benefit issues for the employee.
UI Gross Wages: Missing Records within Employer or TPA Submission.	Fatal	Missing Gross Wages	error.missing.grosswages	Gross Wages must include at least a "0" and must be a positive numeric value. Records without Gross Wages will not (can not) be included for calculations. Employer can submit "0" hours and "0" wages.

Element: Scenario Description	**Record:** *Specific Line within a File*	**Edit/Error Message:**	**Error Code**	**Notes/Business Rules**
UI Gross Wages: Records include comma separating hundreds and thousands within Employer or TPA submission.	Fatal	Gross Wages Contain Commas	error.commas.grosswages	No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For TPAs, if all other Employer records are correct, other records will be processed. **NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.**
UI Gross Wages--: Invalid records/non-numeric in employer or TPA submission.	Fatal	Gross Wages Contain Non-Numeric Values	error.invalid.grosswages	No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For Employers, individual records would be rejected, but if all or most records contained this error the file would be rejected. **NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.**
MA Wages Subject to Withholding: Missing Records within Employer or TPA Submission	Fatal	MA Wages Subject to Withholding Missing	error.missing.DORwithholding wages	MA Wages Subject to Withholding must include at least a "0" and must be a positive numeric value. Records without **MA Wages Subject to Withholding** will not (can not) be included for calculations
MA Wages Subject to Withholding : Invalid Records within Employer or TPA Submission	Fatal	MA Wages Subject to Withholding Invalid	error.invalid.DORwithholding wages	MA Wages Subject to Withholding must include at least a "0" and must be a positive numeric value. Records without **MA Wages Subject to Withholding** will not (can not) be included for calculations. No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For TPAs, if all other Employer records are correct, other records will be processed. **NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.**
MA Income Tax Amount Withheld: Missing Records within Employer or TPA Submission	Fatal	MA Income Tax Amount Withheld Missing	error.missing.DORAmount Withheld	MA Income Tax Amount Withheld must include at least a "0" and must be a positive numeric value. Records without **MA Income Tax Amount Withheld** will not (can not) be included for calculations
MA Income Tax Amount Withheld Invalid Records within Employer or TPA Submission	Fatal	MA Income Tax Amount Withheld Invalid	error.invalid.DORAmount Withheld	MA Income Tax Amount Withheld must include at least a "0" and must be a positive numeric value. Records without **MA Income Tax Amount Withheld** will not (can not) be included for calculations No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For TPAs, if all other Employer records are

Element: Scenario Description	**Record:** *Specific Line within a File*	**Edit/Error Message:**	**Error Code**	**Notes/Business Rules**
				correct, other records will be processed. **NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.**
Hours Worked: Missing Hours Worked within Employer or TPA Submission	Non-Fatal	Missing Hours Worked	error.missing.hoursworked	Missing hours will default to zero
Hours Worked: Invalid/Non-Numeric, Negative, and/or Larger than Possible.	Non-Fatal	Invalid Hours Worked	error.invalid.hoursworked	Negative or non-numeric hours will default to zero. Hours in excess of 999 will default to 999.
Officer Code: Invalid	Non-Fatal	Invalid Officer Codes	error.invalid.officercode	Default to "No" if invalid. Error would be produced. If missing, system will default to "No" without an error being produced.
Employment (1-2-3): Missing Data	Fatal	Missing 12th of Month Data	error.missing.month12	If the field is left blank, the system will reject the record and provide error message.
Employment (1-2-3): Invalid - Non-Numeric Data	Fatal	Invalid/Non-Numeric 12th of Month Data	error.invalid.month12	If the field is invalid, the system will reject the record and provide error message.
Quarter/Year: Missing quarter/year	Fatal	Missing quarter and year	error.missing.quarteryear	Quarter/year layout: Delimited – yyyyq (Quarter 1 2004 = '20041') ICESA – mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004') EFW2 - mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004')
Quarter/Year: Invalid quarter/year	Fatal	Invalid quarter and year format	error.invalid.quarteryear	Quarter/year layout: Delimited – yyyyq (Quarter 1 2004 = '20041') ICESA – mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004') EFW2 - mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004')
Quarter/Year: Quarter/year for record does not match quarter/year select for online file upload by employer	Fatal	Invalid quarter and year – does not match quarter/year selected	error.invalid.quarteryear	If the quarter/year for the record does not match the quarter/year selected by the employer for the online file upload process, the System will produce a fatal error.

Element: Scenario Description	**Record:** *Specific Line within a File*	**Edit/Error Message:**	**Error Code**	**Notes/Business Rules**
Quarter/Year: Quarter/year for record is prior to 2010	Fatal	Invalid quarter and year – prior to 2010	error.invalid.quarteryear	If a record has a quarter/year <2010 and the filing is intended for the > Q4 2009 wage detail process, the system will reject the record. If a record has a quarter year > Q4 2009 and the filing is intended for the Prior to 2010 process, the system will reject the record. Wage records with qtr/yr prior to 2010 should not be mixed with > Q4 2009 records. **NOTE: Prior to 2010 wage detail is indicated by the user selecting the Prior to 2010 link. For FTP filers a separate folder will be set up for prior to 2010 wage files.**

H. ACH CREDIT APPLICATION

(See the following page.)

THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF UNEMPLOYMENT ASSISTANCE

REGISTRATION TO PAY DUA TAXES VIA ACH CREDIT

Company Name: ____

*DUA Employer Account Number: ____

Federal Identification Number: ____

Street: ______________________________ City: ___________________ State: _________ Zip: _______________

**Agent/Professional Tax Preparer/Third Party? ID Number: ____

Contact Person: ____

Email: ____

(Please print clearly – you will only receive confirmation via email)

Phone: _______________________________________ Fax: ____

Mail form to: Department of Unemployment Assistance
Attention: Employer Reports Unit, Revenue Service, 2nd Floor
19 Staniford Street
Boston, MA 02114

OR

Fax form to: (617) 626-6850

Note: After submittal of this registration, if approved, you will be provided via email with the DUA mandated ACH credit record layout and DUA bank account and routing transit numbers.

*Employers must have a DUA Employer Account Number (EAN) to apply.

**Agent/Professional Tax Preparer/Third Party computing their client's amount owed and/or filing this form on behalf of their clients must register with DUA UI Online system as a TPA and receive a TPA ID number. This TPA ID number must be included on this form as part of the registration for ACH Credit Processing. To apply for a TPA ID number, go to: www.mass.gov/uima, and click on: Third Party Administrator (TPA) UI Online login.

If you want to pay online, please register for UI Online and pay via ACH Debit.

5/2018