



Getting Started with QUEST

For Pre-QUEST Employers

Department of Unemployment Assistance (DUA)

Commonwealth of Massachusetts

July 5, 2011

Who Should Use this Booklet?

This booklet has been created specifically for Employers who started conducting business with the Massachusetts Department of Unemployment Assistance (DUA) before the QUEST system was rolled out on December 7, 2009. These **Pre-QUEST Employers** should follow the special instructions in this booklet to get up and running with QUEST.

Almost every Employer who was already conducting business with DUA before December 2009 was automatically set up with an account in QUEST. However, **before you can use that account, you must activate it.**

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. However, if you were in business before December 7, 2009, and you use a TPA, you still need to **activate** your account.

If you are an Employer that uses a TPA you must also **verify that the TPA is authorized** to conduct business with the DUA on your behalf. You can easily check, and if necessary, **set TPA authorizations**, within your QUEST Employer account. If you do not give your TPA authorization, they will no longer be able to conduct business on your behalf.

Using this Booklet

This booklet describes how to activate your account, log into QUEST, change your password, and authorize your TPAs (if any) to conduct business with the DUA on your behalf.

Additional Resources

For detailed instructions on all the Employer functions that can be performed with the QUEST system – including filing wage reports, making payments, adding users, and much more – you can view or print the online Employer User Guide. Navigate to www.mass.gov/uima and click the Employer User Guide Link.

If you need telephone support for any of these procedures, contact the DUA at 617-626-5075.

About the QUEST System

QUEST (Quality Unemployment System Transformation) is the system that provides Employers and Third Party Administrators (TPAs) with a fast, interactive web-enabled way to transact business with the Department of Unemployment Assistance (DUA).

For Employers and TPAs, QUEST automates the wage and employment reporting, tax calculation, and payment processing, and provides these time-saving improvements over the pre-QUEST system:

- 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.
- Large Employers and/or TPAs can file electronically and process multiple records at the same time.
- Smaller Employers can use online processing for quarterly tax filing and upload documents using specified formats.
- Employers and TPAs can make secure online payments.

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ACCOUNT ACTIVATION

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 user name** and **temporary password**. (Call 617-626-5075 if this information is no longer available.)

The temporary user name 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**. During account activation, this number is referred to as your 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.

Note that if you stop before your new User ID and Password display on screen, your activation **will not be complete**.

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 what permissions those users get. Therefore, the person chosen by the Employer to activate the account should be a highly trusted employee.

1. Go to www.mass.gov/uima.
2. Scroll to the QUEST area of the page. Click the **Account Activation** button.

Login to QUEST
Monday to Friday: 7:00am - 10:00pm.
Saturday: 7:00am - 3:00pm. Employers can login to report wages, file payments, change address and even authorize access for an agent who does business on your behalf.

 **Account Activation** Employers currently registered with DUA must activate their QUEST account first. Please click the Account Activation button and enter your DUA Employer Account Number (EAN) and Activation Password which were mailed to you to begin your account activation.

Getting Started with QUEST

- The **Activate Your Account** page appears. Enter your **Employer Account Number** without dashes. Enter the **Activation Password** that was provided to you. Click **Next** to continue.

NOTE: You may know the Employer Account Number as your DUA Employer ID or your State Unemployment Insurance (SUI) Number.

The screenshot shows the 'Activate Your Account' page. At the top left is the Commonwealth of Massachusetts logo. At the top right, it says 'Thursday, June 23, 2011' with a 'Print Preview' link. Below the header is a navigation menu with 'Logon' selected and a note '* Indicates Required Field'. On the left is a sidebar with links: 'Employer Registration', 'System Availability', 'User Guide', 'Returning Employer', and 'Account Activation'. The main content area has a blue header 'Activate Your Account' followed by instructions: 'You can activate your account by completing just a few quick steps. To begin, enter your Employer Account Number(EAN) and the Activation Password you received and select 'Next'. If you need to access your account prior to receiving your permanent logon credentials, you may use the login information from your activation letter for the next 30 days.' Below this are two input fields: 'Employer Account Number(EAN):' and 'Activation Password:', both with red asterisks indicating they are required. A 'Next' button is at the bottom center. At the bottom right, there are links for 'Accessibility | Privacy Statement | Viewing Tips'.

- 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.

The screenshot shows the 'Welcome to UI Employer Account Activation!' page. At the top left is the Commonwealth of Massachusetts logo. At the top right, it says 'Thursday, June 23, 2011' with a 'Print Preview' link. Below the header is a navigation menu with 'Logon' selected and a note '* Indicates Required Field'. On the left is a sidebar with links: 'Employer Registration', 'System Availability', 'User Guide', 'Returning Employer', and 'Account Activation'. The main content area has a blue header 'Employer Information' followed by 'Employer Account Number: [redacted]' and 'Employer Name: [redacted]'. Below this is a blue header 'Welcome to UI Employer Account Activation!' followed by text: 'Employers who pay wages within Massachusetts are required to register with and report quarterly wage data to this Agency. This activation process will create your new online DUA account.' A note follows: 'Please note that not completing the activation process could result in the loss of entered data.' Below this is a blue header 'Necessary Activation Information' followed by text: 'To successfully activate your online self-service account, you will need the following pieces of information:' and a bulleted list: '• Federal Employment Identification Number (FEIN)', '• Contact Information', '• Employer Information, including Legal and Physical address', and '• Owner/Officer Information'. Below this is a blue header 'Notification' followed by text: 'All information provided in this filing must be 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.' A 'Next' button is at the bottom center. At the bottom right, there are links for 'Accessibility | Privacy Statement | Viewing Tips'.

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

The screenshot shows the 'Administrator Information' page. At the top left is the Commonwealth of Massachusetts logo and the date 'Thursday, June 23, 2011'. A navigation bar includes 'Logon' and '* Indicates Required Field'. A progress indicator shows three steps: 1. Employer Information (active), 2. Business Information, and 3. Owner/Officer Information, leading to 'COMPLETE'. The page contains a sidebar with links: 'Employer Registration', 'System Availability', 'User Guide', 'Returning Employer', and 'Account Activation'. The main content area has a header 'Employer Information' with fields for 'Employer Account Number' and 'Employer Name'. Below is the 'Administrator Information' section, which includes a certification statement: 'To enter information for this employer you must be an authorized administrator® of this account. Please enter the following information about yourself:'. This section contains input fields for 'First Name', 'Last Name', 'Phone', 'Secondary Phone', 'Business Title', and 'Email', each with a red asterisk indicating it is required. There are also 'ext.' fields for both phone numbers. A checkbox is checked, with the text: 'By checking this box, I certify that I am authorized by the owner/officer of this organization to enter employer information. I also certify that I am authorized to function as an Administrator on this account.' At the bottom are 'Exit' and 'Next' buttons. A footer link reads 'Accessibility | Privacy Statement | Viewing Tips'.

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

The screenshot shows the 'Contact Information' page. It features the same header and navigation as the previous page. The progress indicator shows step 1 completed and step 2, 'Business Information', as the current step. The sidebar and 'Employer Information' section are identical to the previous page. The 'Contact Information' section begins with the instruction: 'Please enter the following information about the person that should be contacted with questions regarding the initiation of this self-service account.' It includes a checkbox labeled 'Same as Administrator' which is checked. Below this are input fields for 'First Name', 'Last Name', 'Business Title', 'Business Phone', 'Secondary Phone', and 'Email'. There are also 'ext.' fields for the business and secondary phone numbers. 'Previous' and 'Next' buttons are at the bottom. The footer link 'Accessibility | Privacy Statement | Viewing Tips' is also present.

Getting Started with QUEST

- 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.

NOTE: You may still enter an email address even if your communication preference is US Mail.

The screenshot shows the 'Communication Method / Business Information' page of the QUEST system. The page header includes the Commonwealth of Massachusetts logo and the date 'Thursday, June 23, 2011'. A navigation bar shows a progress indicator with three steps: 1. Employer Information, 2. Business Information (current step), and 3. Owner/Officer Information, leading to 'COMPLETE'. A legend indicates that an asterisk (*) denotes a required field. The page is divided into three main sections: 'Employer Information' with fields for 'Employer Account Number' and 'Employer Name'; 'Communication Method' with a dropdown menu for 'Method Of Communication' (set to 'Email') and a 'Business E-Mail Address' field; and 'Business Information' with three questions: 'Do you use a common paymaster?', 'If yes, enter the FEIN for your common paymaster.', 'Will this employer act as a Leasing Company?', and 'Do you have employees that perform services that may be exempt under Section 6 of MGL 151A?'. Each question has radio button options for 'Yes' and 'No'. At the bottom, there are 'Previous' and 'Next' buttons. A footer contains links for 'Accessibility | Privacy Statement | Viewing Tips'.

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

Getting Started with QUEST

9. The **Address Validation** page appears. Select the radio button to the left of the address that is closest to your actual address and click **Next** to continue.

Address Validation

One or more potential addresses are provided below to comply with U.S. Post Office standards. Please indicate your choice and click "Next" to proceed, or click "Previous" to change the address you provided.

Possible Matches

19 Staniford St
Boston, MA 02114-2508

Provided Address

19 Staniford St
Boston, MA 02143

10. The **Massachusetts 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**.)

1 → 2 → 3 → COMPLETE
Employer Information Business Information Owner/Officer Information

Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Massachusetts Physical Location

Does this employer have a [Physical Location](#)® in Massachusetts?(This cannot include a P.O box or client site or employee home address) Yes No*

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

1 → 2 → 3 → COMPLETE
Employer Information Business Information Owner/Officer Information

Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Massachusetts Physical Location Address

Please enter, confirm or make modifications to your [MA physical location address](#).® This address cannot be a Post Office box. Do not enter a client site, other temporary job site, or employee home address.

Same as:

Address Line 1:

Address Line 2:

City:

State: **Massachusetts**

Zip Code:

Country: **United States Of America**

Phone: ext:

Fax:

E-Mail:

12. The **Owner/Officer** page appears.

1 →
 2 →
 3 → COMPLETE
Employer Information Business Information Owner/Officer Information

Employer Information

Employer Account Number: ██████████ Employer Name: ██████████

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
<input type="radio"/> *	Roger ██████████	President	██████████	19 Staniford St. Boston	99.00%
<input type="radio"/> *	Tony ██████████	Partner	██████████	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: <input style="width: 90%;" type="text"/>		Legal Entity Name: <input style="width: 90%;" type="text"/>
Middle Initial: <input style="width: 80%;" type="text"/>		FEIN: <input style="width: 80%;" type="text"/>
Last Name: <input style="width: 90%;" type="text"/>		
Social Security Number: <input style="width: 90%;" type="text"/>		

Additional Information

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

Business Title:	<input style="width: 80%;" type="text" value="[Select One]"/>
Percent of Ownership:	<input style="width: 80%;" type="text"/>
First Date of Ownership / Appointment:	<input style="width: 80%;" type="text"/> (mm/dd/yyyy)
Is the owner/officer compensated for their services?:	<input type="radio"/> Yes <input type="radio"/> No
Address Line 1:	<input style="width: 90%;" type="text"/>
Address Line 2:	<input style="width: 90%;" type="text"/>
City:	<input style="width: 90%;" type="text"/>
State:	<input style="width: 90%;" type="text" value="MA - Massachusetts"/>
Zip Code:	<input style="width: 90%;" type="text"/>
Country:	<input style="width: 90%;" type="text" value="US - United States Of America"/>
E-Mail:	<input style="width: 90%;" type="text"/>

- 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

Getting Started with QUEST

- Review Owner/Officer entries (if any) in the **Review Owner/Officer Information** area.
 - To 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**.
- Add Owner/Officer entries if necessary:
 - 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.
- 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.
- When finished, click **Next**.

IMPORTANT NOTES:

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.

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

13. The **Activation Complete** page appears. It provides a permanent **User ID** and a **Password**. Print this information and keep in a safe place.

At this point you can continue by clicking **Login**, or stop and continue later. In either case, follow the instructions in the section *Logging In*.

IMPORTANT NOTE: Make sure to print or otherwise record your User ID and Password.

1 → 2 → 3 → COMPLETE
Employer Information Business Information Owner/Officer Information

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

Activation Complete
Thank you for providing this information. You have successfully initiated your online self service account. Your permanent User ID and password are as follows:
User ID: [REDACTED]
Password: [REDACTED]

You will receive a copy of your logon credentials via US Mail, but print this page for your records.

Login

LOGGING IN

If you are logging in for the **first time after completing your account activation** you will be prompted to change the QUEST-generated password and establish your security question and PIN.

NOTE: If you just completed your account activation without closing the browser, start at **Step 3**.

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

Login to QUEST
Monday to Friday: 7:00am - 10:00pm.
Saturday: 7:00am - 3:00pm. Employers can login to report wages, file payments, change address and even authorize access for an agent who does business on your behalf.



Employers currently registered with DUA must activate their QUEST account first. Please click the Account Activation button and enter your DUA Employer Account Number (EAN) and Activation Password which were mailed to you to begin your account activation.

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

Commonwealth of Massachusetts Thursday, June 23, 2011
[Print Preview](#)

Logon * Indicates Required Field

Employer Registration
System Availability
User Guide
Returning Employer
Account Activation

Massachusetts Division of Unemployment Assistance : Employer Login

To access Employer account information, enter your User ID and Password. For purposes of authentication, using your Password is considered the same as using your signature.

User ID: *

Password: *

Your account will be locked after 4 attempts. If you are having problems logging in, select the "Forgot Password" button to reset your password.

Helpful Resources Home

Employer Registration Create a new employer account to obtain an Employer Account Number and create System Administrator user.	System Availability The QUEST Unemployment System is available Monday - Friday, 7:00 a.m. to 10:00 p.m. and Saturday, 7:00 a.m. to 3:00 p.m. Eastern time.
User Guide A guide to using the Employer Self-Service System.	Returning Employer Complete a Pending Registration using the Temporary User ID and Password.
Account Activation Activate legacy system account to conduct business online.	

Getting Started with QUEST

- If the **Reset Password** page appears (for first time login), 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.

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[Print Preview](#)

Change Password | Logoff * Indicates Required Field

Employer Registration
System Availability
User Guide
Returning Employer
Account Activation

Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

- 4 Digit Pin Code: The 4 Digit Pin Code is a 4 digit numeric entry of your choosing. The PIN is an alternate "User" credential which you create(d) during the permanent password set up. This information is requested for authentication purposes when the user indicates they have forgotten their password.

Reset Password

Please choose a new password and other information by entering it in the fields below and clicking save. For additional information on password security, please refer to the [password guidelines](#).

Current Password: [REDACTED] *

New Password: [REDACTED] *

Re-enter new password: [REDACTED] *

Security Question: What is your father's middle name? *

Security Answer: Test *

4-digit PIN Code: 1234 *

[Save](#)

Accessibility | Privacy Statement | Viewing Tips

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

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Thursday, June 23, 2011
[Print Preview](#)

Change Password | Logoff

Employer Home

Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Employer Home

[Employer Home](#)
Employer Home

[FAQ](#)
Review frequently asked questions (FAQ's) for the UI program or UI system.

[Workflow - My Inbox](#)
View any action items requiring your attention.

[Account Maintenance](#)
Maintain account information including changing legal name, mailing address, owners/officers, reporting units, or reporting status. View the most recent Tax Rate Notice, authorize TPAs or provide information regarding the purchase or sale of a business.

[Benefit Charge Activities](#)
View Benefit Charges by calendar year and quarterly summaries; claimant detail summaries; and individual claimant transaction details. Additional information includes fiscal year summaries with tax rate buydown and/or merger-acquisition details related to benefit charges.

[Correspondence](#)
Search for Correspondence

[Employment and Wage Detail Reporting](#)
Submit Employment and Wage Detail Reports for this Agency and the Department of Revenue. View historical Employment and Wage Reporting information.

[Payment Information](#)
Make payments; view account summary, pending payments, processed or cancelled payments, taxable wages, and FUTA credit information.

[User Maintenance](#)
Assign or Update user access to Employer account information.

Accessibility | Privacy Statement | Viewing Tips

TPA AUTHORIZATION

This section explains how you as an Employer can authorize Third Party Administrators (TPAs) to conduct business with the DUA on your behalf. The functions that TPAs can be authorized to perform are designated with specific role assignments. TPAs can be assigned one, several, or all available roles. Multiple TPAs can be authorized as well; however, no role can be assigned to more than one TPA. **Beginning 10/1/2011**, TPAs will no longer be able to act on your behalf unless you have authorized them in QUEST.

To quickly perform a basic TPA authorization, perform the steps in these two sections:

- **Viewing the TPA Authorization Page.**
- **Authorizing a TPA.** This includes instructions on setting TPA Services begin and end dates, and assigning roles to the TPA.

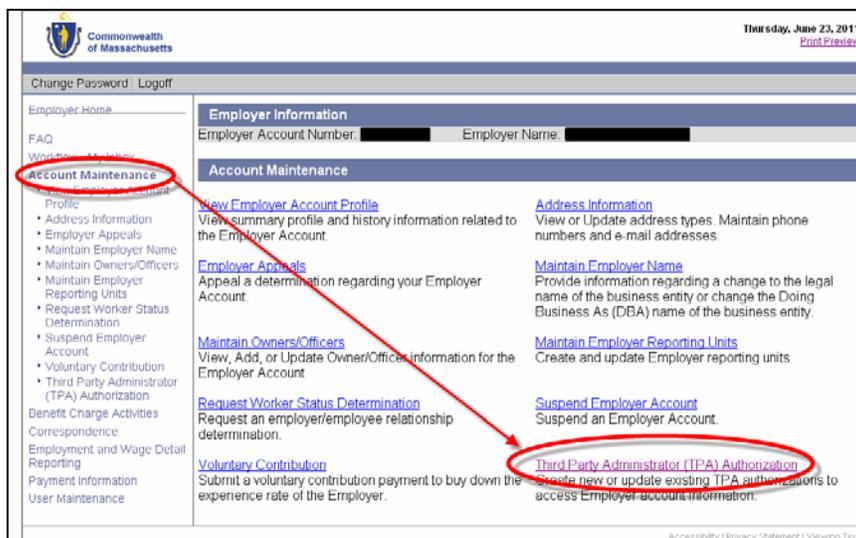
IMPORTANT NOTE: You will need to enter a TPA ID for each TPA you authorize. If necessary, contact your TPA(s) for their current TPA ID(s) before you begin.

For more information on viewing and changing the TPA authorization, see these sections as well:

- 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

Viewing the TPA Authorization Page

1. Log in to your QUEST Employer Account.
2. Click the **Account Maintenance** link in the left pane.
3. Click the **Third Party Administrator (TPA) Authorization** link.



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

Authorizing a TPA

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

The screenshot shows the 'Third Party Administrator (TPA) Authorization' page. The page header includes the Commonwealth of Massachusetts logo and the date 'Thursday, June 23, 2011'. A navigation menu on the left lists various account management options, with 'Third Party Administrator (TPA) Authorization' highlighted. The main content area has a section for 'Employer Information' with fields for 'Employer Account Number' and 'Employer Name'. Below this is the 'Third Party Administrator (TPA) Authorization' section, which includes instructions on how to search for existing TPAs and a form with fields for 'TPA Name', 'TPA ID', and 'Role'. At the bottom of this section, there are 'Search' and 'Reset' buttons. A link for 'Role Definitions' is provided. Below the 'Role Definitions' link, there is a section for assigning a new TPA, with a 'New' button circled in red. The 'Home' button is also visible.

NOTE: Click the **Role Definitions** link on this page for details about TPA roles.

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

The screenshot shows the 'Assign Third Party Administrator (TPA)' page. The page header includes the Commonwealth of Massachusetts logo and the date 'Thursday, June 23, 2011'. A navigation menu on the left lists various account management options, with 'Assign Third Party Administrator (TPA)' highlighted. The main content area has a section for 'Assign Third Party Administrator (TPA)' with instructions on how to authorize a TPA. Below the instructions, there is a form with a 'TPA ID' field circled in red. The 'TPA ID' field is marked with an asterisk to indicate it is a required field. Below the 'TPA ID' field, there are 'Previous' and 'Next' buttons.

4. The Third Party Administrator Information page appears.
 - Enter the **TPA Services Begin Date**. (This date cannot be prior to the current date.)
 - Enter a **TPA Services End Date** or leave blank.
 - Check each role in the **Add** column that applies to this TPA.
 - Click **Save** to complete the authorization.

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Print Preview

Change Password | Logout * Indicates Required Field

Employer Home

FAQ

Workflow - My Inbox

Account Maintenance

- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Request Worker Status Determination
- Suspend Employer Account
- Voluntary Cont...
- Third Party Administrator Authorization**

Benefit Charge Ac...

Correspondence

Employment and V...

Reporting

Payment Information

User Maintenance

Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Third Party Administrator (TPA) Information

TPA ID: [REDACTED] TPA Name: [REDACTED]

TPA Details

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.

Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the roles(s) you would like them to perform.

TPA Services Begin Date: 06/23/2011 * (mm/dd/yyyy)

TPA Services End Date: (mm/dd/yyyy)

Select TPA Begin and End Dates

Add Roles

Reporting units select the Assigned Units link in the Modify column. es by business unit.

to all reporting units unless you change the units

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

No records found...

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
<input checked="" type="checkbox"/>	Account Maintenance Update and Submit ®
<input type="checkbox"/>	Account Maintenance View Only
<input type="checkbox"/>	Benefit Charges Protest Submission ®
<input type="checkbox"/>	Benefit Charges View Only
<input checked="" type="checkbox"/>	Payments Update and Submit ®
<input type="checkbox"/>	Payments View Only
<input checked="" type="checkbox"/>	Employment and Wage Detail Update and Submit ®
<input type="checkbox"/>	Employment and Wage Detail View Only
<input type="checkbox"/>	Wage and Separation Mailing ®

Previous Save

Accessibility | Privacy Statement | Viewing Tips

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.

Click a role name in the Role list for details about activities a TPA with that role can perform.

A role assignment can only be actively applied to one TPA at a time. If you have **two active TPAs** and you are changing role assignments between them, you must unassign a role from one TPA and assign it to another **on the date the reassignment should take place.**

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 TPA ID in the search fields.

Click **Search**.

Third Party Administrator (TPA) Authorization
Using either the TPA Name or TPA ID you may search for an existing Third Party Administrator that was previously assigned to your account.
To see all TPAs associated with your account press Search without entering any search criteria

TPA Name:
TPA ID:
Role: All

3. The search results appear in the same screen, 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.

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Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Third Party Administrator (TPA) Details

To assign and un-assign TPA roles or to remove the TPA from your account select the 'Modify' button.

TPA ID: [REDACTED]
 TPA Name: [REDACTED]
 Address: [REDACTED]
 [REDACTED]
 [REDACTED]

TPA Service Begin Date: 6/23/2011
 TPA Service End Date:

[Modify](#)

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		

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Modifying a TPA's Service Dates

1. View the TPA Authorization page by clicking the **Account Maintenance** link in the left pane, and then clicking the **Third Party Administrator (TPA) Authorization** link.
2. Display a list of your authorized TPAs by clicking **Search**.
3. 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

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- In the Third Party Administrator (TPA) Details page, click **Modify**.

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Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Third Party Administrator (TPA) Details

To assign and un-assign TPA roles or to remove the TPA from your account select the 'Modify' button.

TPA ID: [REDACTED]

TPA Name: [REDACTED]

Address: [REDACTED]

TPA Service Begin Date: 1/18/2011

TPA Service End Date: [REDACTED]

Modify

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
Employment and Wage Detail Update and Submit	0000	UNKN, Boston	Assigned Units
Payments Update and Submit	No units are assigned		

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- In the TPA Details area, change the **TPA Service Begin Date** and/or **TPA Service End Date**.

TPA Details

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.

Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the roles(s) you would like them to perform.

TPA Services Begin Date: 1/18/2011 * (mm/dd/yyyy)

TPA Services End Date: 6/23/2011 (mm/dd/yyyy)

NOTE: The **Begin Date** you enter cannot be prior to the current date. The **End Date** can be blank.

- Click **Save**.

Adding or Removing TPA Role Assignments

1. View the TPA Authorization page by clicking the **Account Maintenance** link in the left pane, and then clicking the **Third Party Administrator (TPA) Authorization** link.
2. Display a list of your authorized TPAs by clicking **Search**.
3. 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

4. In the Third Party Administrator (TPA) Details page, click **Modify**.


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Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Third Party Administrator (TPA) Details

To assign and un-assign TPA roles or to remove the TPA from your account select the 'Modify' button.

TPA ID: [REDACTED]

TPA Name: [REDACTED]

Address: [REDACTED]

TPA Service Begin Date: 1/18/2011

TPA Service End Date: [REDACTED]

[Modify](#)

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
Employment and Wage Detail Update and Submit	0000	UNKN, Boston	Assigned Units
Payments Update and Submit	No units are assigned		

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5. Scroll to the area where **Assigned Roles** and **Unassigned Roles** are listed.

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
<input type="checkbox"/>	Account Maintenance Update and Submit [®]	
<input checked="" type="checkbox"/>	Payments Update and Submit [®]	
<input checked="" type="checkbox"/>	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	
<input type="checkbox"/>	Account Maintenance View Only	
<input checked="" type="checkbox"/>	Benefit Charges Protest Submission [®]	
<input type="checkbox"/>	Benefit Charges View Only	
<input type="checkbox"/>	Payments View Only	
<input type="checkbox"/>	Employment and Wage Detail View Only	
<input type="checkbox"/>	Wage and Separation Mailing [®]	
<input type="button" value="Previous"/> <input type="button" value="Save"/>		

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

Assigning TPA Roles by Reporting Unit

NOTE: The use of a reporting unit provides a DUA tax filer with an option to characterize employee wages as originating in a division within an EAN (e.g., product manufacturing, sales force or service department) or at a branch location of the employer (e.g., downtown office, uptown branch, west side branch etc.). Unless otherwise designated by the submitter, reported wages default to the main reporting unit 0000.

1. View the TPA Authorization page by clicking the **Account Maintenance** link in the left pane, and then clicking the **Third Party Administrator (TPA) Authorization** link.
2. Display a list of your authorized TPAs by clicking **Search**.
3. 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

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- In the Third Party Administrator (TPA) Details page, click **Assigned Units** in the row for the Role you want to reassign by reporting unit.

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Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Third Party Administrator (TPA) Details

To assign and un-assign TPA roles or to remove the TPA from your account select the 'Modify' button.

TPA ID: [REDACTED]
 TPA Name: [REDACTED]
 Address: [REDACTED]

TPA Service Begin Date: 1/18/2011
 TPA Service End Date: [REDACTED]

[Modify](#)

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
Employment and Wage Detail Update and Submit	0000	UNKN, Boston	Assigned Units
Payments Update and Submit	No units are assigned		

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

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Employer Information

Employer Account Number: [REDACTED] Employer Name: [REDACTED]

Third Party Administrator (TPA) Information

TPA ID: [REDACTED] TPA Name: [REDACTED] CPA

Assigned Role

Employment and Wage Detail Update and Submit

In order to add or remove a reporting unit assignment, please select the appropriate check-box, then click 'Save'. If you do not click 'Save', or click 'Previous', changes to role assignment will be lost.

Assigned Employer Reporting Units [Unassign All](#)

Remove	Reporting Unit Number	Name
<input type="checkbox"/>	0000	UNKN, Boston

Un-assigned Employer Reporting Units [Assign All](#)

No records found...

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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.

- Entering the current date ends the association **immediately**.
- Entering a future date will cause the authorization to end on that date.

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