Commonwealth
of Massachusetts

`

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.

CONTENTS

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.

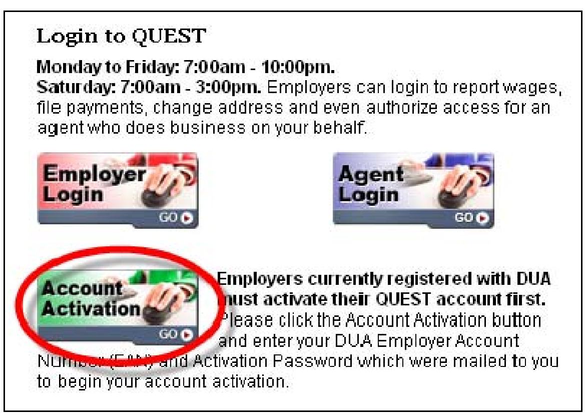
Note that if you stop before your new User ID and Password display on screen, your activation **will not be complete**.

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.

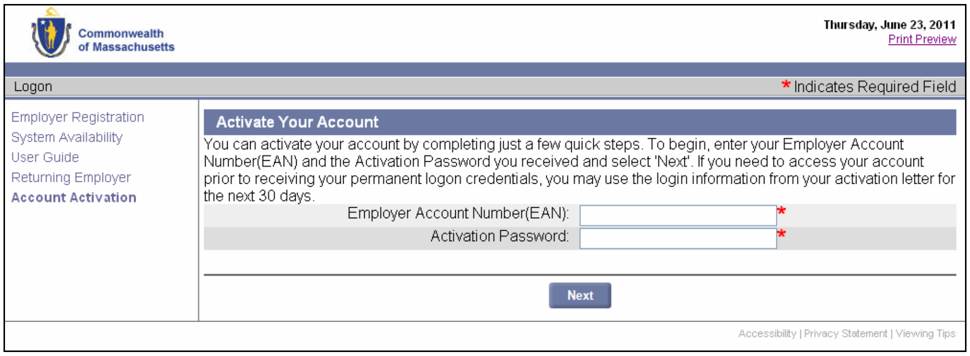
IMPORTANT NOTE: The person who activates the account is actually creating a user who is assigned the System Administrator role by default. This user has access to all information in the Employer's account and is able to make changes, perform transactions, add additional users to the account, and choose 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.

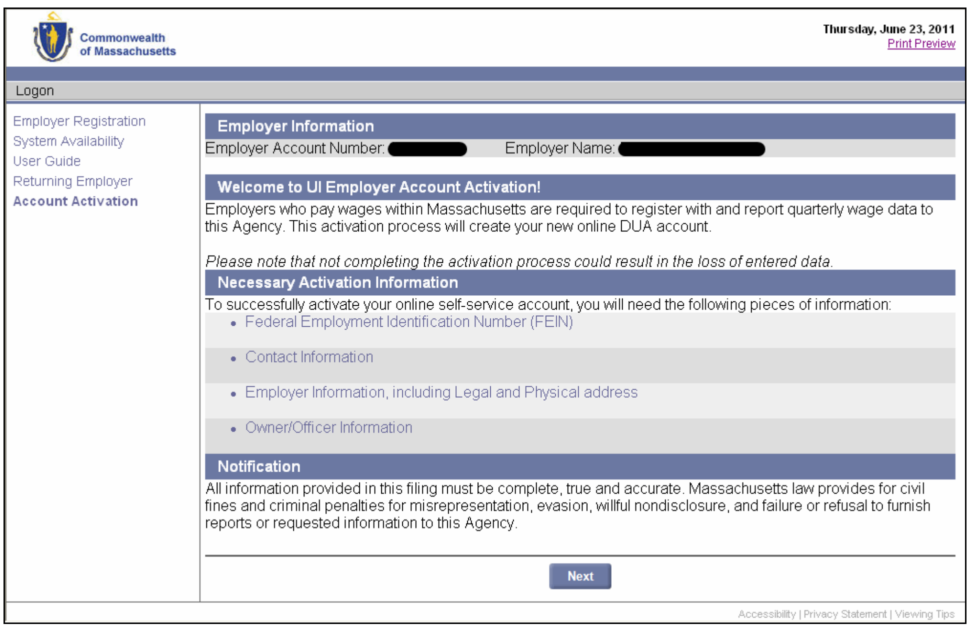


3. The **Activate Your Account** page appears. Enter your **Employer Account Number** without dashes. Enter the **Activation Password** that was provided to you. Click **Next** to continue.

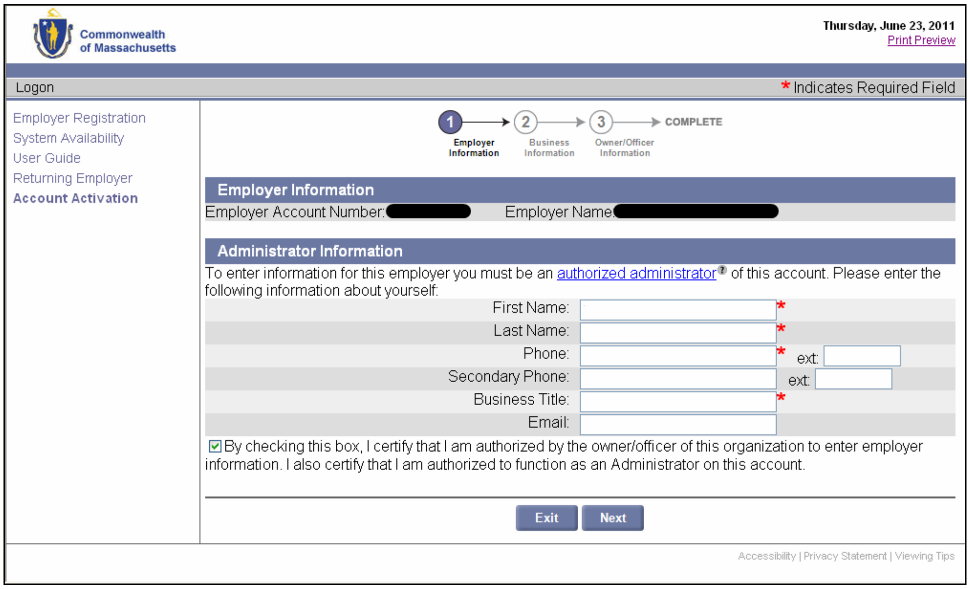
   NOTE: You may know the Employer Account Number as your DUA Employer ID or your State Unemployment Insurance (SUI) Number.



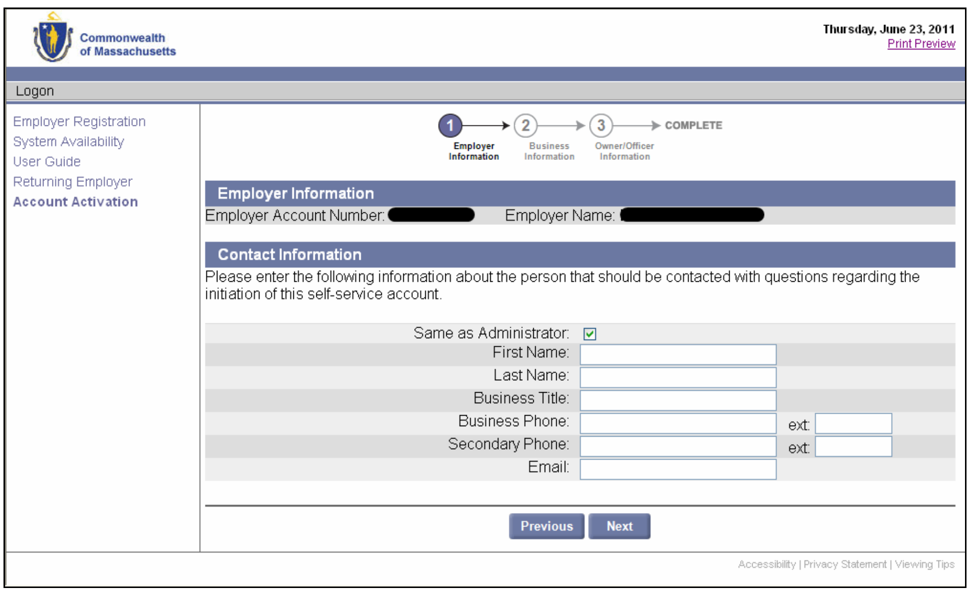
4. The **Welcome** page appears. Your **Employer Account Number** and **Employer Name** display at the top of the page. Read the information on the page and click **Next** to continue.



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



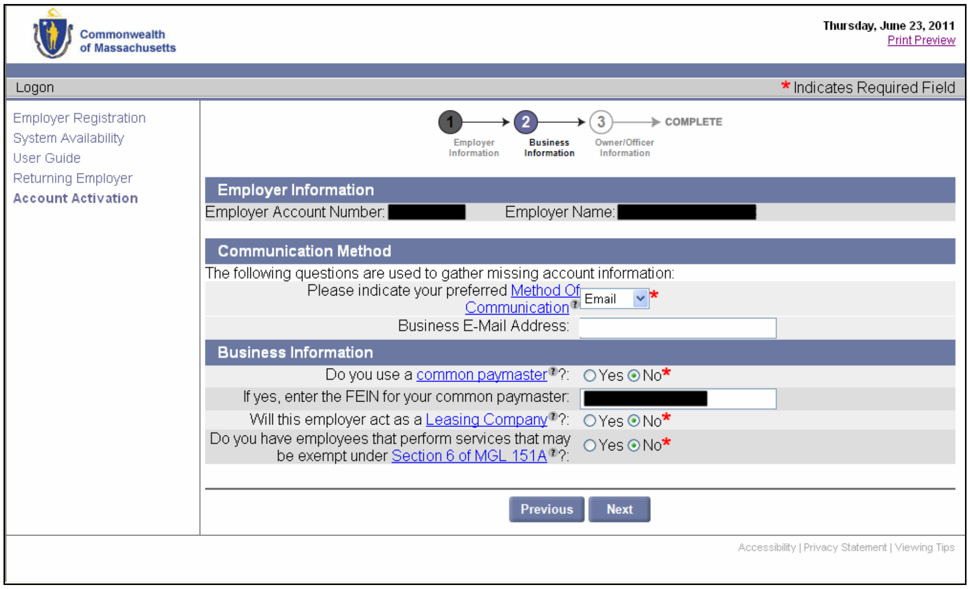
6. The **Contact Information** page appears. Enter the requested information **or** put a check next to **Same as Administrator**. Click **Next** to continue.



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**.

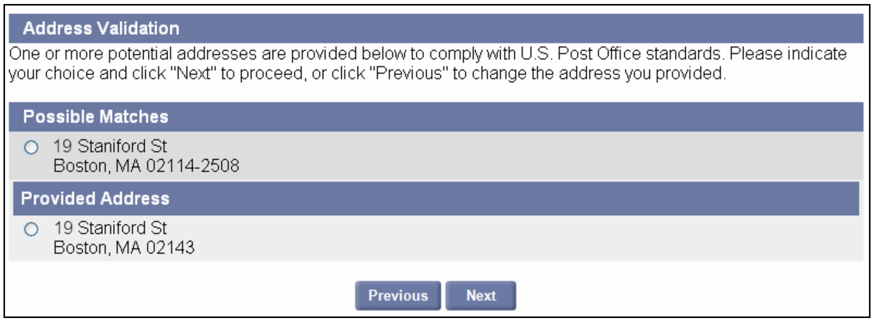
   IMPORTANT NOTE: The Communication Method you choose at this point determines the default method for all official communications to you from DUA.

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



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 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

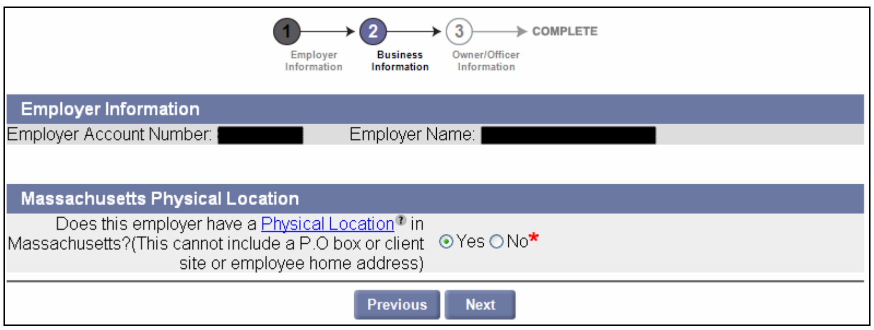
19 Staniford St
Boston, MA 02114-2508

Provided Address

19 Staniford St
Boston, MA 02143

Previous | Next

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

Employer Information

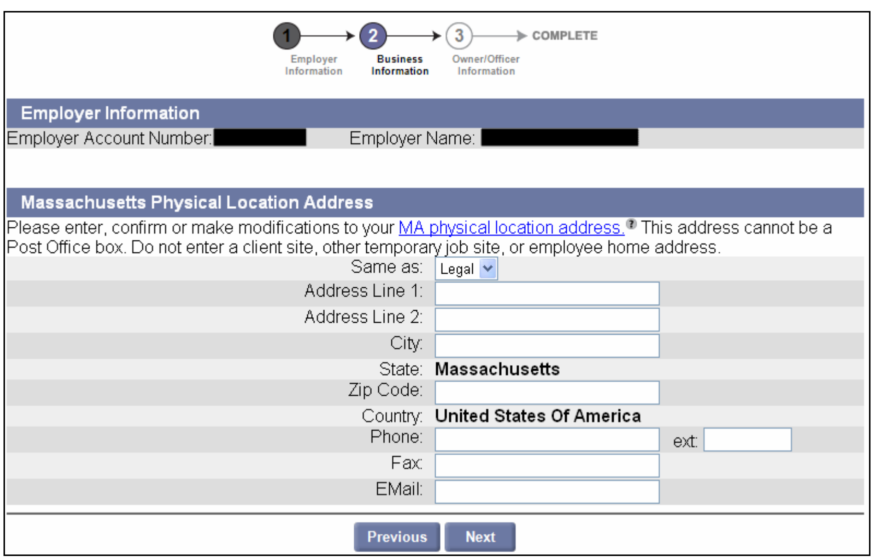
Employer Account Number: [redacted] Employer Name: [redacted]

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*

Previous | Next

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

Employer Information

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

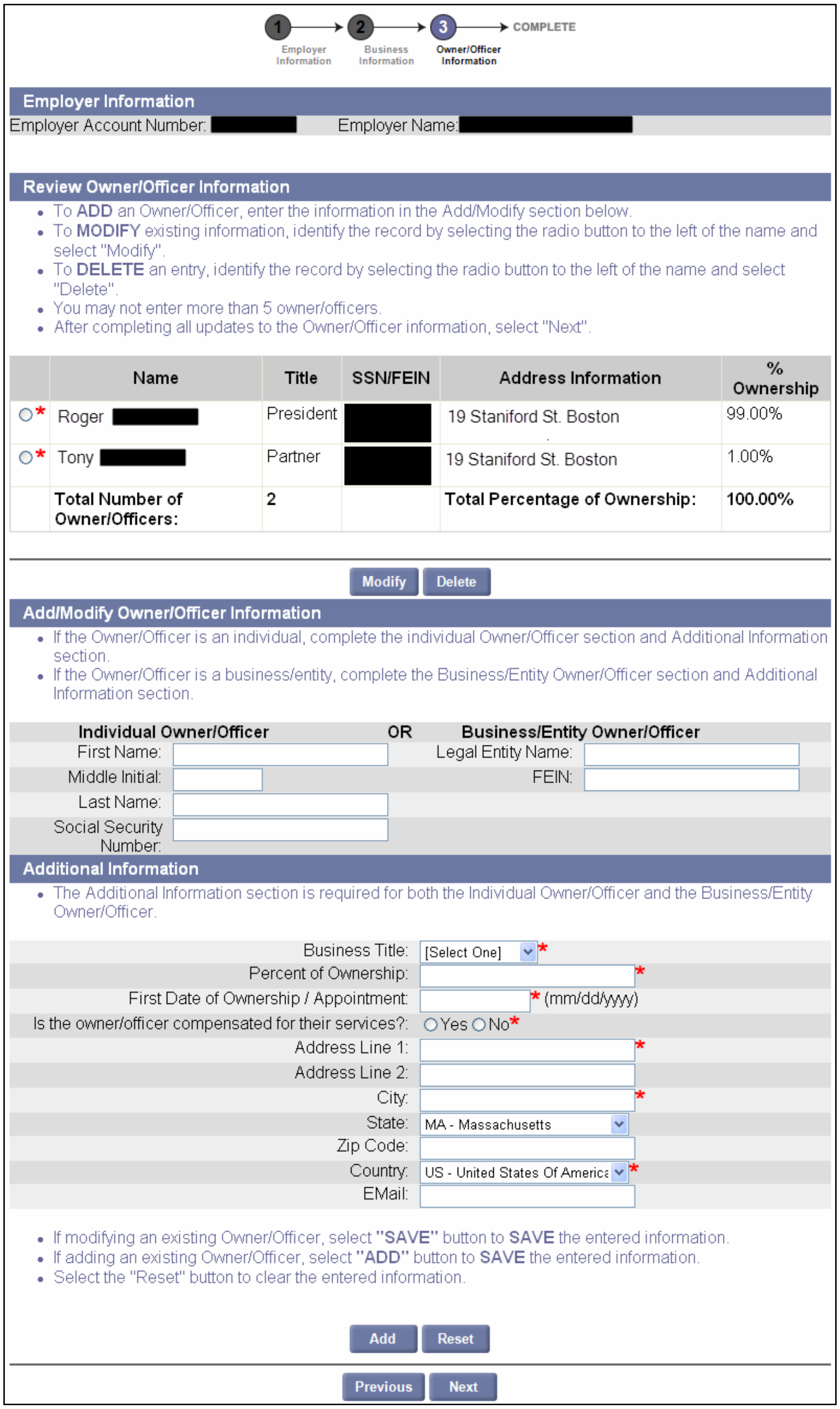
Massachusetts Physical Location Address

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: Legal
Address Line 1:
Address Line 2:
City:
State: Massachusetts
Zip Code:
Country: United States Of America
Phone: ext:
Fax:
EMail:

Previous | Next

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



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

- 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:

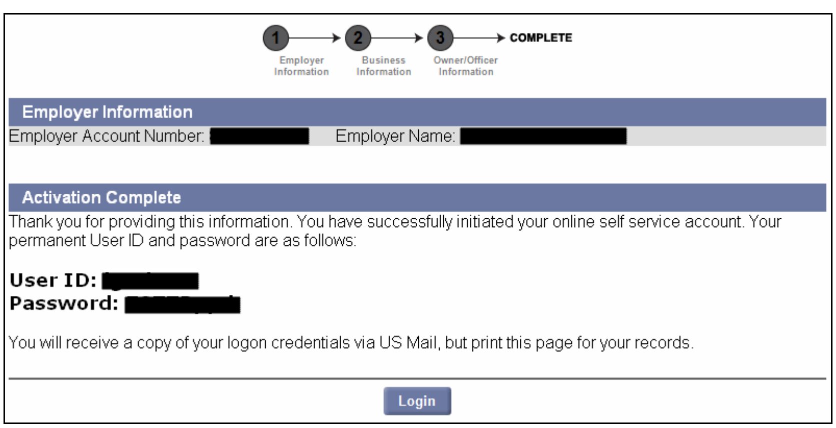
  Information about an Owner/Officer in the **Add/Modify Owner/Officer Information** area should *either* go under **Individual Owner/Officer** (left column) *or* **Business Entity Owner/Officer** (right column). Do not put information in both columns.

  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.



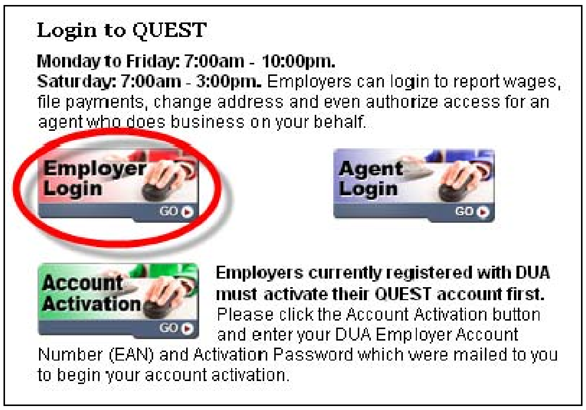
LOGGING IN

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.

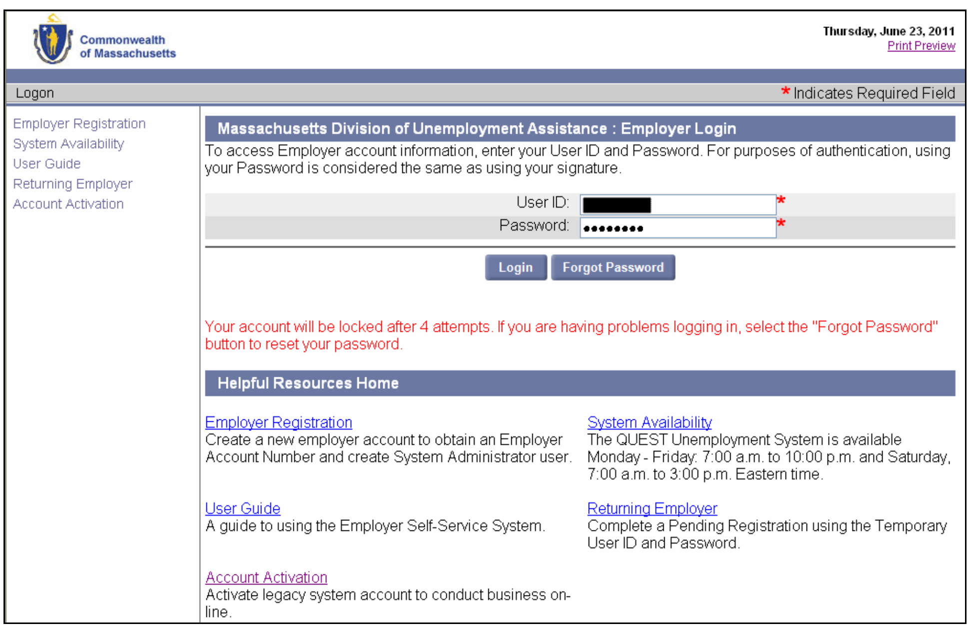
NOTE: If you just completed your account activation without closing the browser, start at **Step 3**.

1. If necessary, navigate to the DUA – QUEST webpage at www.mass.gov/uima.

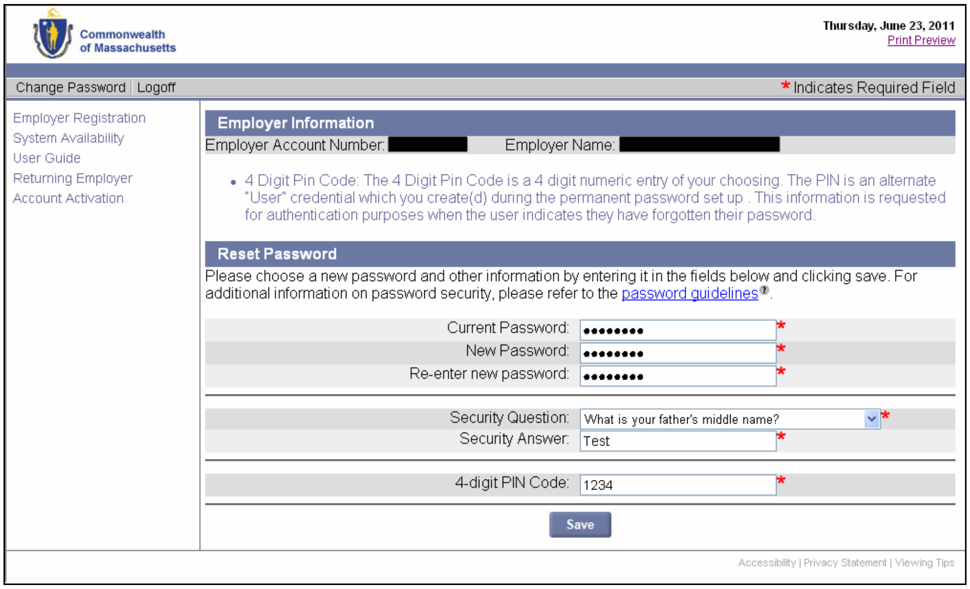
2. Scroll to the QUEST area of the page. Click **Employer Login**.



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



4. 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.


Commonwealth of Massachusetts

Thursday, June 23, 2011
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: •••••••• *
New Password: •••••••• *
Re-enter new password: •••••••• *

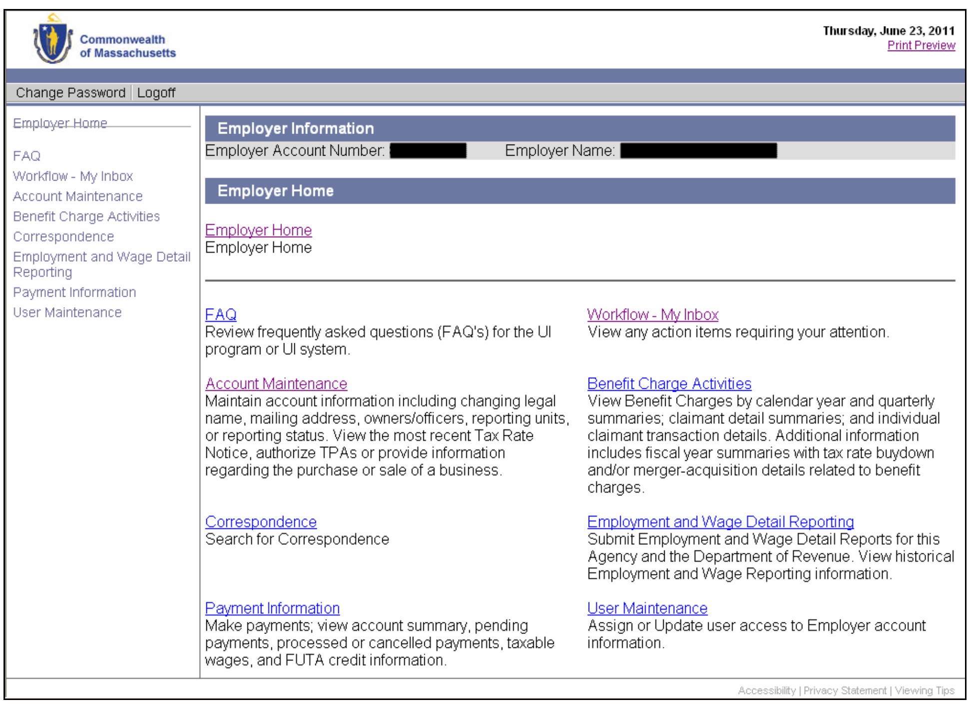
Security Question: What is your father's middle name? *
Security Answer: Test *

4-digit PIN Code: 1234 *

Save

Accessibility | Privacy Statement | Viewing Tips

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


Commonwealth of Massachusetts

Thursday, June 23, 2011
Print Preview

Change Password | Logoff

Employer Home
FAQ
Workflow - My Inbox
Account Maintenance
Benefit Charge Activities
Correspondence
Employment and Wage Detail Reporting
Payment Information
User Maintenance

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.

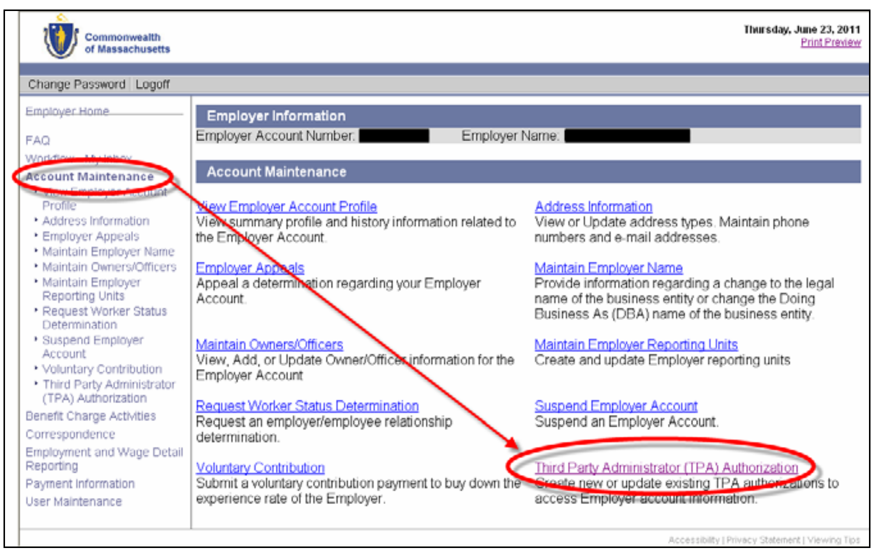
IMPORTANT NOTE: You will need to enter a TPA ID for each TPA you authorize. If necessary, contact your TPA(s) for their current TPA ID(s) before you begin.

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

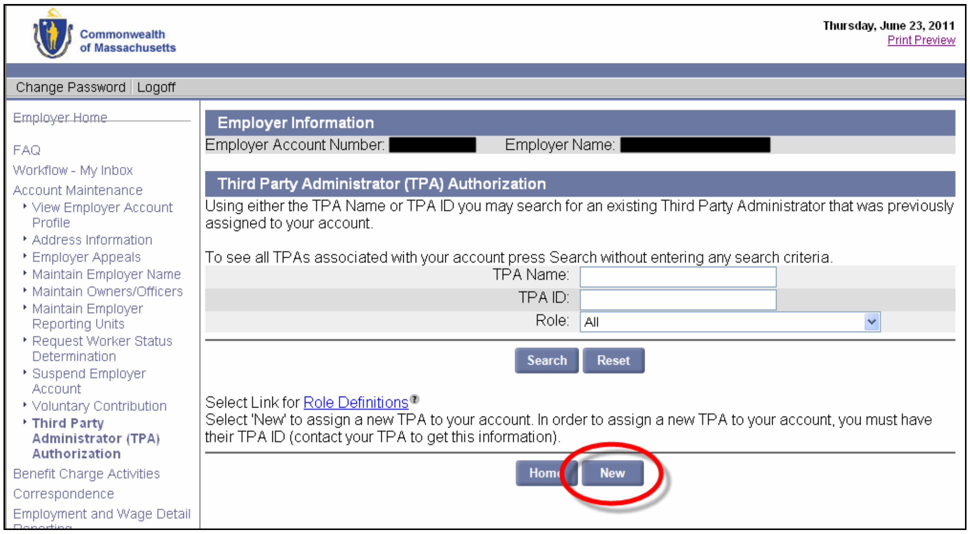
1. Log in to your QUEST Employer Account.
2. Click the **Account Maintenance** link in the left pane.
3. Click the **Third Party Administrator (TPA) Authorization** link.



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

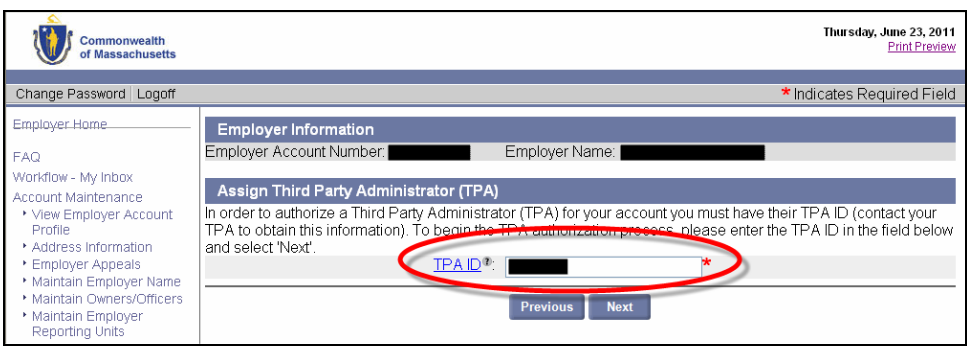
Authorizing a TPA

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



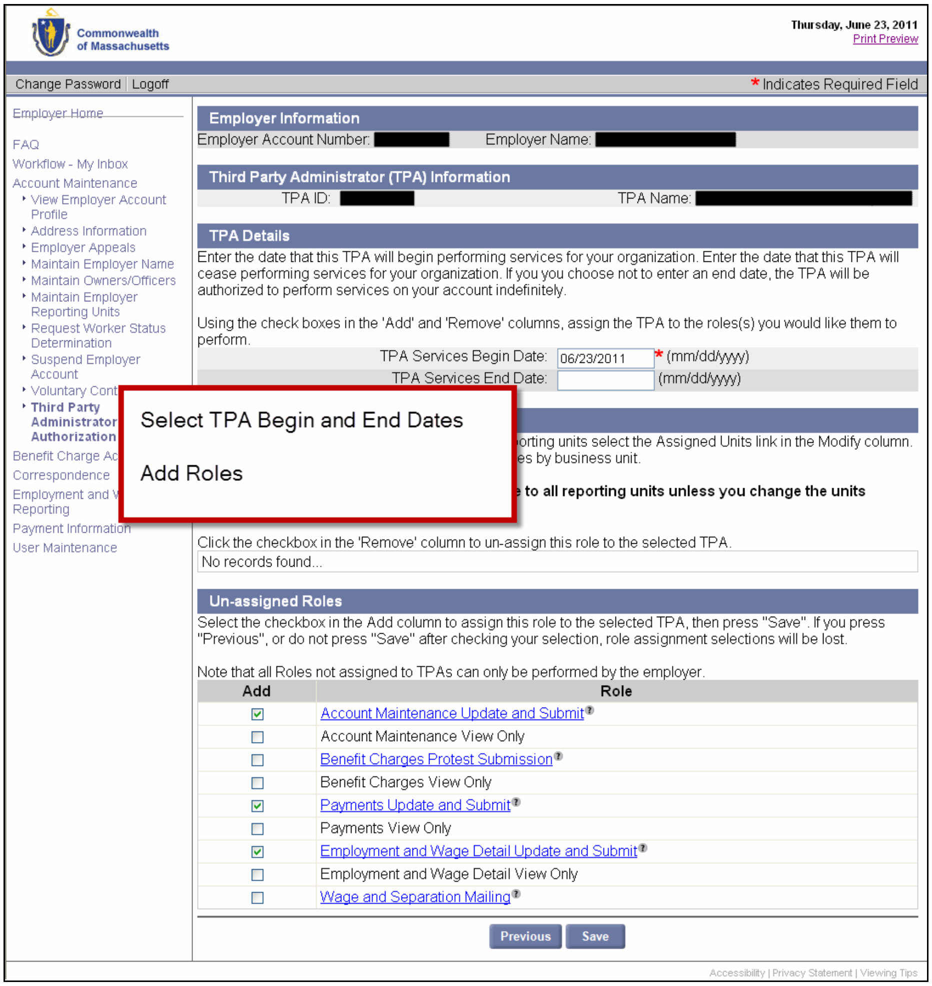
NOTE: Click the **Role Definitions** link on this page for details about TPA roles.

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



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.



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.

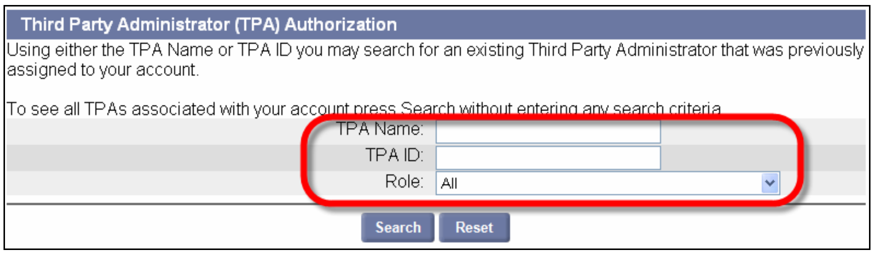
Any role(s) not assigned to a TPA must be performed by the Employer.

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.

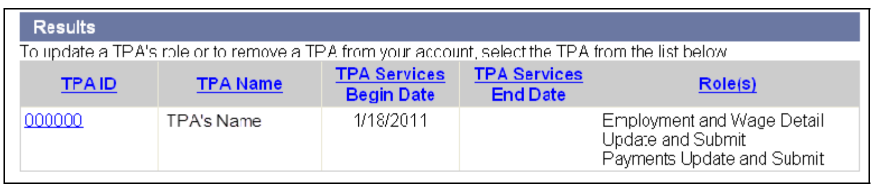
TPA Name:

TPA ID:

Role: All

Search Reset

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

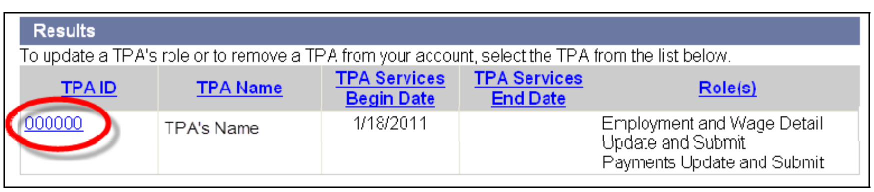

Results

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

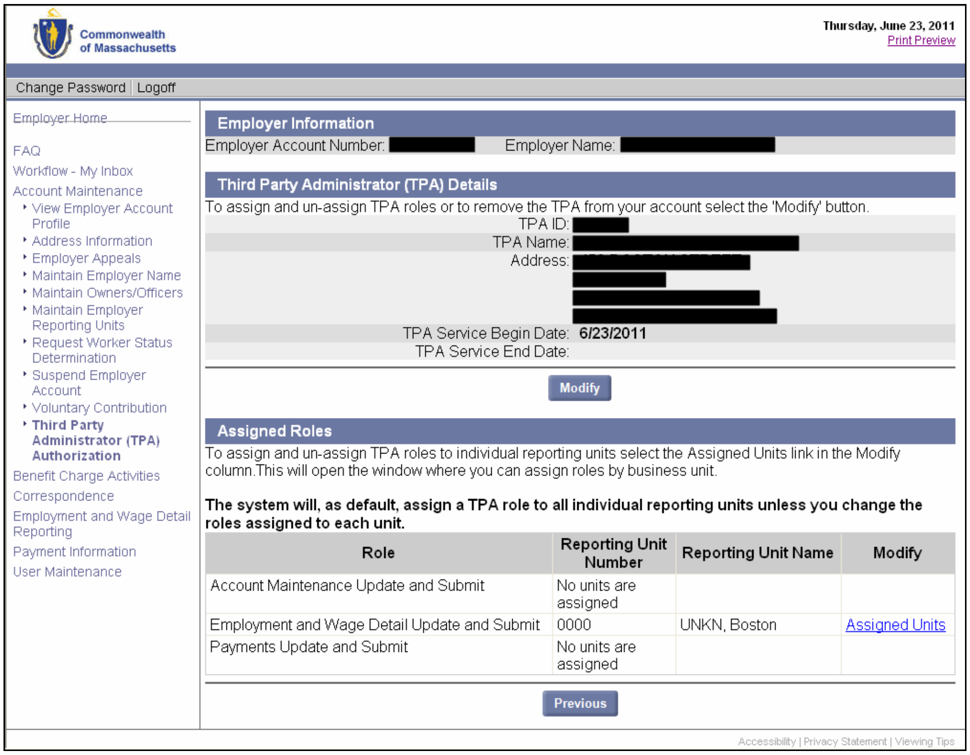
1. Perform the steps in: *Displaying a List of Your Authorized TPAs*.
2. Click on a TPA ID to display authorization details.


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.

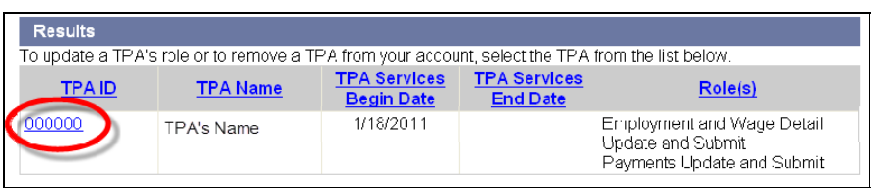


Modifying a TPA's Service Dates

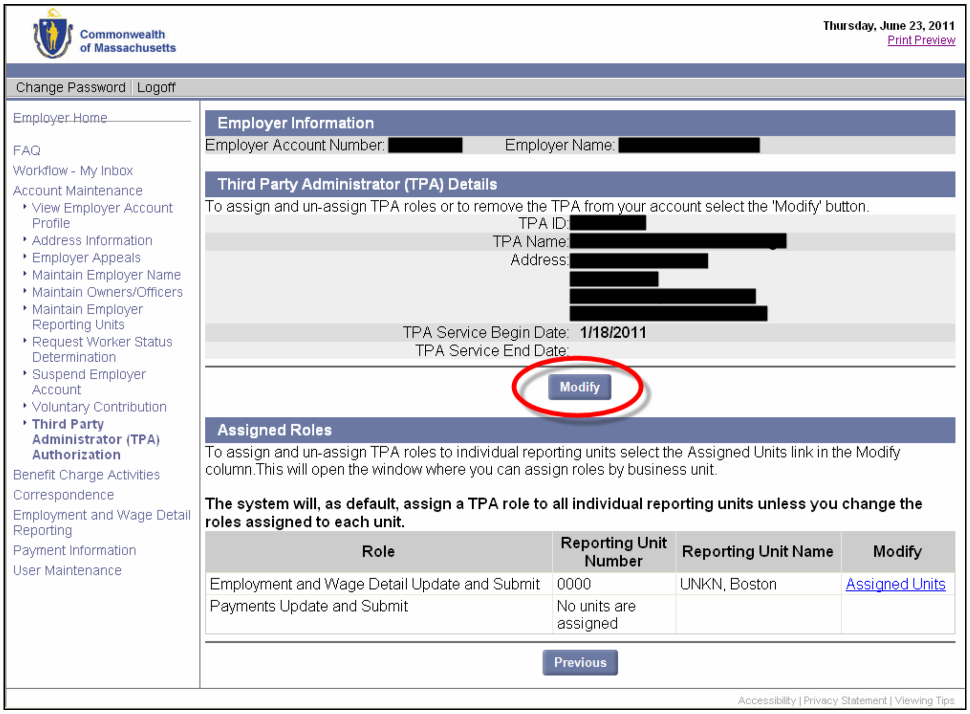
1. View the TPA Authorization page by clicking the **Account Maintenance** link in the left pane, and then clicking the **Third Party Administrator (TPA) Authorization** link.

2. Display a list of your authorized TPAs by clicking **Search**.

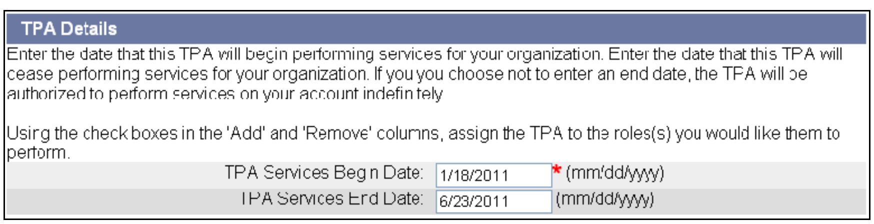
3. Click on a TPA ID to display authorization details.



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



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

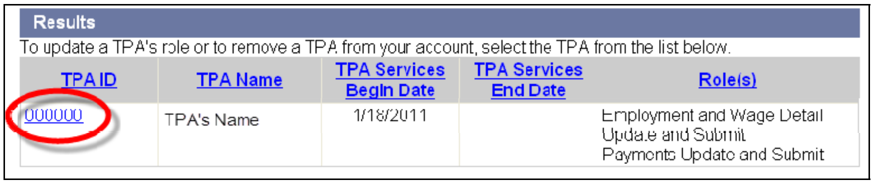


NOTE: The **Begin Date** you enter cannot be prior to the current date. The **End Date** can be blank.

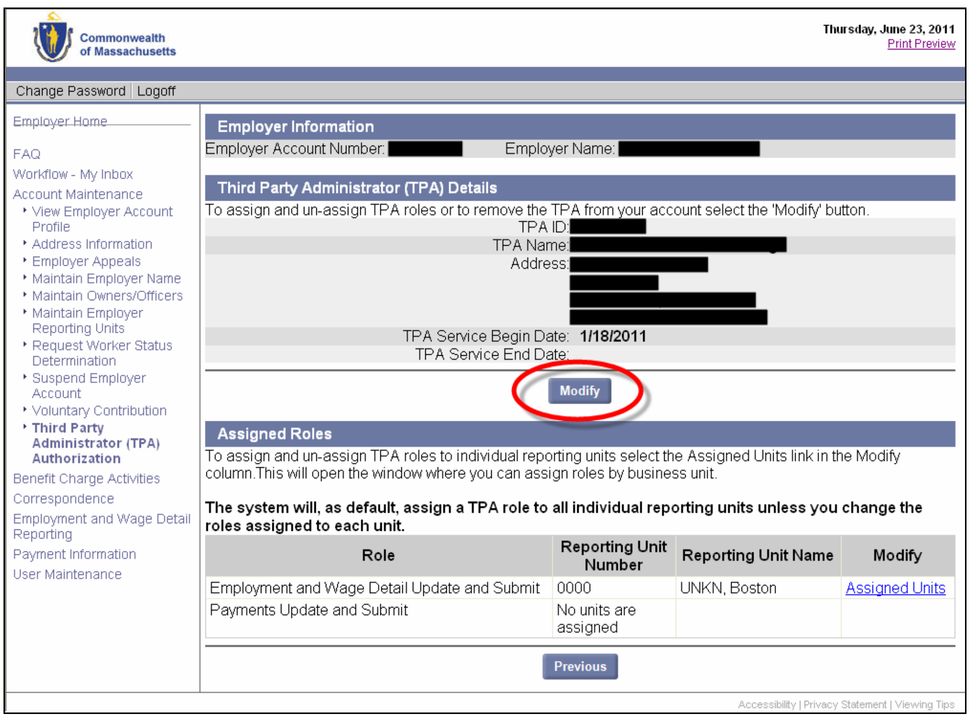
6. Click **Save**.

Adding or Removing TPA Role Assignments

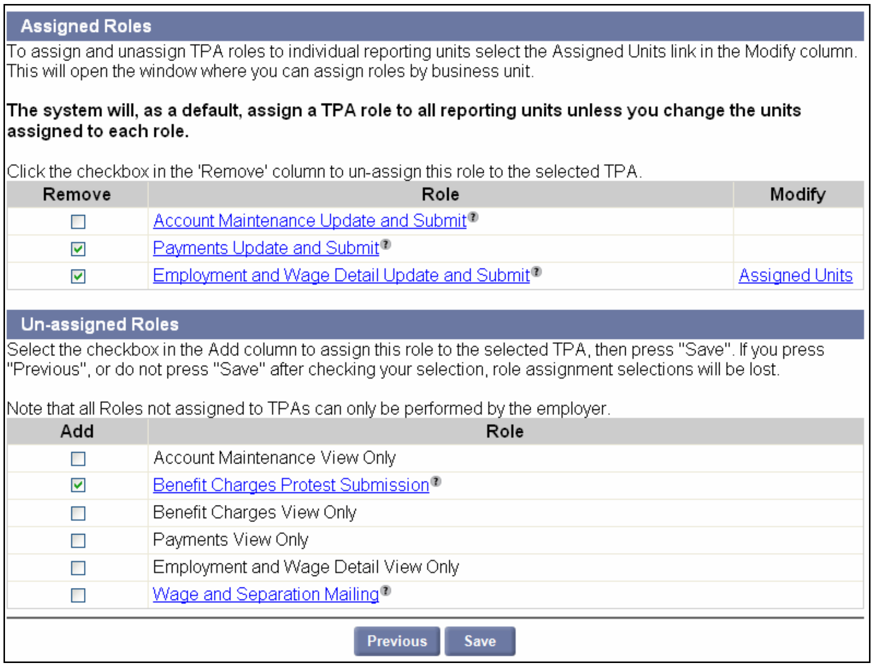
1. View the TPA Authorization page by clicking the **Account Maintenance** link in the left pane, and then clicking the **Third Party Administrator (TPA) Authorization** link.
2. Display a list of your authorized TPAs by clicking **Search**.
3. Click on a TPA ID to display authorization details.



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



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
☐	Account Maintenance Update and Submit	
☑	Payments Update and Submit	
☑	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
☑	Benefit Charges Protest Submission
☐	Benefit Charges View Only
☐	Payments View Only
☐	Employment and Wage Detail View Only
☐	Wage and Separation Mailing

Previous Save

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

7. Click **Save**.

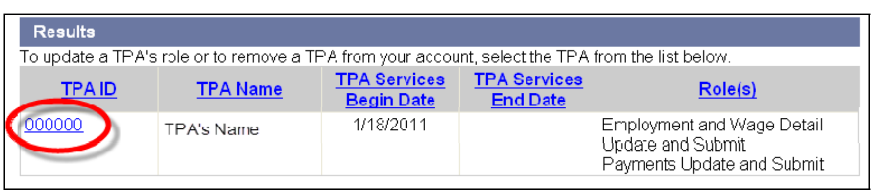
Assigning TPA Roles by Reporting Unit

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.

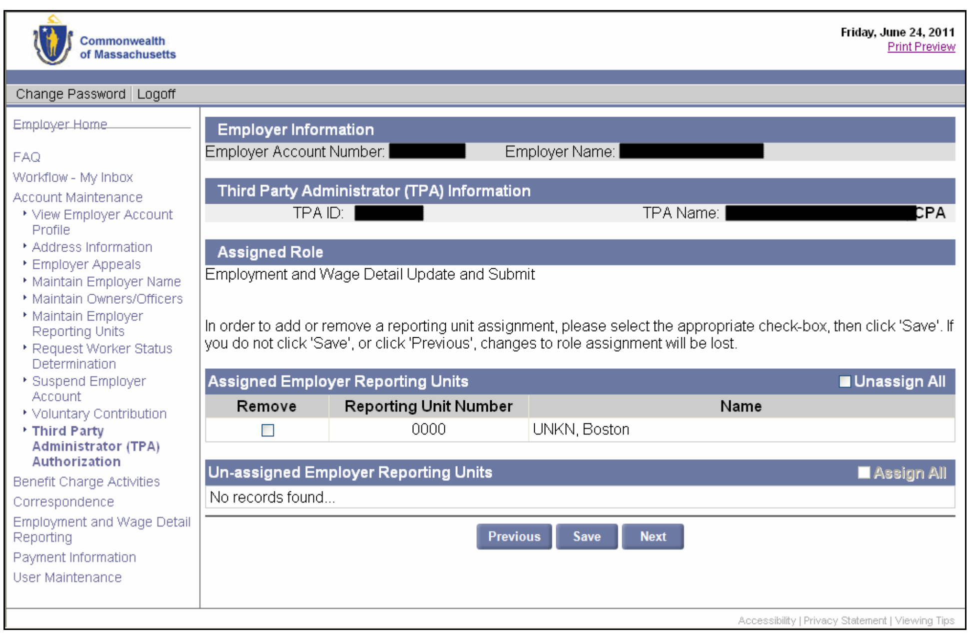

Results

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

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

5. 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.

- 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.