

# USER MAINTENANCE

## Introduction

This section of the document will explain how an authorized user can create new or modify existing TPA user accounts. Within each TPA user account, role assignment allows you to specify the level of access for the TPA user account.

## Step-by-Step Instructions:

### CREATE TPA USER ACCOUNT:

1. Navigate to the TPA home page/splash page. If required, please refer to the section on 'Navigating to TPA Home page/Splash Page'.
2. Click on the link 'Third Party Administrator Roles'. The following page will appear.

The screenshot shows the 'Third Party Administrator Roles' page. At the top, there are links for 'Change Password' and 'Logoff'. Below that is a navigation menu with 'Third Party Administrator Roles' selected. The main content area shows 'Third Party Administrator' with 'TPA ID: 1001' and 'TPA Name: XXXX'. Under 'User Search Criteria', there are input fields for 'User ID', 'Last Name', and 'First Name', and a dropdown for 'Roles' set to 'Any'. At the bottom are 'Search', 'Reset', and 'New' buttons. Two callout boxes are present: one pointing to the 'Search' button with the text 'Enter search parameters and click here to view/modify existing account.', and another pointing to the 'New' button with the text 'Click here to create new user account.'

3. Click on 'New'. The following page will appear. Enter the required information and click on 'Save'

The screenshot shows the 'Third Party Administrator Roles' page for creating a new user. At the top, there are links for 'Change Password' and 'Logoff', and a note '\* Indicates Required Field'. Below that is a navigation menu with 'Third Party Administrator Roles' selected. The main content area shows 'Third Party Administrator' with 'TPA ID: 1001' and 'TPA Name: XXXX'. Under 'User Details', there are input fields for 'First Name', 'Middle Initial', 'Last Name', 'Telephone', 'eMail', 'Employee ID', '4-digit PIN Code', 'Effective Start Date', and 'Effective End Date'. Red asterisks indicate that 'First Name', 'Last Name', 'eMail', 'Employee ID', '4-digit PIN Code', and 'Effective Start Date' are required fields. There is also an 'ext.' field next to the 'Telephone' field. At the bottom are 'Save' and 'Cancel' buttons.

- The new user account will be created and the login credentials will be emailed to the email address provided in step 3. The following page will appear confirming the same.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator Roles

**Third Party Administrator**

TPA ID: 100 TPA Name: XXXX

**Password Link Sent**

An eMail message has been sent to the user containing an encrypted link which that user can use to login to the system and establish a password.

Note: This password link will only be effective for the next **2 hours**.

Next

- Please refer to the section below, for instructions to assign roles to the newly created TPA user account. This step is required; otherwise, the user will not be able to perform any functions using the newly created account.

**MODIFY TPA USER ACCOUNT:**

- Follow the first two steps outlined in the instructions to create a new TPA account.
- Click on 'Search', after entering search parameters. The following page will appear with the search results. Click on the user ID to continue.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator Roles

**Third Party Administrator**

TPA ID: 100 TPA Name: XXXX

**User Search Criteria**

User ID: tk501

Last Name:

First Name:

Roles: Any

Search Reset New

**User Search Results**

User ID	Last Name	First Name	Eff. Start	Eff. End
<a href="#">tk501</a>	K	Tom	11/19/2009	

Click here to view/modify this user account.

- The following page will appear, providing a list of account modification options.

Change Password | Logoff

TPA Home

Account Maintenance  
Assign TPA Role  
Employment and Wage Detail Reporting  
Payment Information  
Searches  
User Maintenance  
Third Party Administrator Roles

**Third Party Administrator**  
TPA ID: 100 TPA Name: XXXX

**User Details**

User Type: **Agent**  
User ID: **tk501**  
First Name: **Tom**  
Middle Initial:  
Last Name: **K**  
Telephone:  
eMail:  
[Employee ID](#) <sup>?</sup>  
[PIN Code](#) <sup>?</sup> **2135**  
Effective Start Date: **11/19/2009**  
Effective End Date:  
Last Logged On: **11/22/2009**  
Incorrect Password Attempts: **0**  
Account Status: **Active**  
Security Question: **What was the name of the street you grew up on?**  
Security Answer: **s**

List of account modification options - with brief descriptions.

**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

- Modify: Click on 'Modify' in step 3. The following page will appear. Enter your changes and click 'Save' to confirm the changes.

Change Password | Logoff \* Indicates Required Field

TPA Home

Account Maintenance  
Assign TPA Role  
Employment and Wage Detail Reporting  
Payment Information  
Searches  
User Maintenance  
Third Party Administrator Roles

**Third Party Administrator**  
TPA ID: 100 TPA Name: XXXX

**User Details**

User Type: **Agent**  
User ID: **tk501**  
First Name: Tom \*  
Middle Initial:   
Last Name: k \*  
Telephone:  ext:   
eMail:  \*  
[Employee ID](#) <sup>?</sup>  \*  
[4-digit PIN Code](#) <sup>?</sup> 2135  
Effective Start Date: **11/19/2009**  
Effective End Date:   
Last Logged On: **11/22/2009**  
Incorrect Password Attempts: **0**  
Account Status: **Active**  
Security Question: **What was the name of the street you grew up on?**  
Security Answer: **s**

**Previous Comments**

**New Comments**

Save Cancel

5. Click on 'Roles' in step 3. The following page will appear. Use the checkboxes to assign available roles/remove existing roles. Click on 'Save' to confirm the changes.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator Roles

**Third Party Administrator**

TPA ID: 1001 TPA Name: XXXX

**Assign Roles To User**

User Type: Agent  
User ID: tk501  
Name: Tom K

**Current Roles Assigned to User**

**Remove**

TPA User  
Description: TPA User

System Administrator  
Description: TPA System Administrator

**Available Roles**

No records found...

Save Cancel

6. Click on 'Reset Password' in step 3. The following page will appear. A warning message will be displayed indicating that you are about to reset the password. Click on 'Confirm' to continue. An email message will be sent to the user with the instructions to reset the password.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator Roles

**Third Party Administrator**

TPA ID: 100 TPA Name: XXXX

**Reset Password**

Are you sure that you wish to reset the password for: tk501  
This action will cause the system to send a secure link to the user's eMail address for the user to click and create a new password.

Confirm Cancel

7. Click on 'Inactivate' in step 3. The following page will appear. A warning message will be displayed that you are about to inactivate the account. Click 'Confirm' to proceed.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator Roles

**Third Party Administrator**

TPA ID: 100 TPA Name: XXXX

**Inactivate User**

Are you sure that you wish to inactivate the user: tk501

Confirm Cancel

8. The following page will be displayed. The account status will read – ‘User Inactivated’. If you wish to revive the account in the future, click on ‘Reactivate’ and follow the prompts to re-activate the account.

Change Password | Logoff

IPA Home

- Account Maintenance
- Assign TPA Role
- Employment and Wage Detail Reporting
- Payment Information
- Searches
- User Maintenance
  - Third Party Administrator Roles

Third Party Administrator	
TPA ID: <b>100</b>	TPA Name: XXXX
User Details	
User Type:	<b>Agent</b>
User ID:	<b>xx505</b>
First Name:	X
Middle Initial:	
Last Name:	X
Telephone:	
eMail:	@detma.org
Employee ID *:	2135
PIN Code *:	2135
Effective Start Date:	11/22/2009
Effective End Date:	11/22/2009
Last Logged On:	
Incorrect Password Attempts:	0
Account Status:	<b>User inactivated</b>
Security Question:	
Security Answer:	
Modify User Attributes	
<a href="#">Modify</a>	Update the basic information for this user.
<a href="#">Roles</a>	View/Edit security roles for which this user is assigned.
<a href="#">Reset Password</a>	Reset the user's password by sending a "password reset" eMail.
<a href="#">Reinstate</a>	Reinstate the user's access to the system.

[Previous](#)

In the future, click here to re-activate the account if required.