

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.

The screenshot shows the QUEST Employer User Guide interface. At the top right, it displays the date "Tuesday, July 19, 2011" and a "Print Preview" link. Below the header, there are navigation links for "Change Password" and "Logoff". The main content area is divided into two columns. The left column contains a sidebar with various menu items, including "Employer Home", "FAQ", "Workflow - My Inbox", "Account Maintenance" (with sub-items like "View Employer Account Profile", "Address Information", "Employer Appeals", etc.), "Benefit Charge Activities", "Correspondence", "Employment and Wage Detail Reporting", "Payment Information", and "User Maintenance". The right column displays the "Employer Information" and "Account Maintenance" sections. The "Account Maintenance" section lists several links: "View Employer Account Profile", "Address Information", "Employer Appeals", "Maintain Employer Name", "Maintain Owners/Officers", "Provide Information on the Purchase or Sale of a Business", "Request Worker Status Determination", "Suspend Employer Account", "Voluntary Contribution", and "Third Party Administrator (TPA) Authorization". The "Third Party Administrator (TPA) Authorization" link is circled in red. At the bottom right of the page, there are links for "Accessibility", "Privacy Statement", and "Viewing Tips".

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**.

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'. The main content area is titled 'Third Party Administrator (TPA) Authorization' and contains the following text: '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.' Below this text are input fields for 'TPA Name', 'TPA ID', and 'Role' (set to 'All'). There are 'Search' and 'Reset' buttons. Below the search fields, there is a link for 'Role Definitions' and a note: 'Select Link for Role Definitions. Select 'New' to assign a new TPA to your account. In order to assign a new TPA to your account, you must have their TPA ID (contact your TPA to get this information).' At the bottom of the page, there are 'Home' and 'New' buttons, with the 'New' button circled in red.

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'. The main content area is titled 'Assign Third Party Administrator (TPA)' and contains the following text: 'In order to authorize a Third Party Administrator (TPA) for your account you must have their TPA ID (contact your TPA to obtain this information). To begin the TPA authorization process, please enter the TPA ID in the field below and select 'Next'.' Below this text is a text input field labeled 'TPA ID' with a red asterisk indicating it is a required field. The field contains a blacked-out value. There are 'Previous' and 'Next' buttons below the input field. The 'TPA ID' field is circled in red.

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.

Commonwealth of Massachusetts
Thursday, June 23, 2011
Print Preview

Change Password | Logoff * 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 role(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

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

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**.

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 page, below the search grid.

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.

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.

The screenshot shows the 'Third Party Administrator (TPA) Details' page. At the top, it displays the Commonwealth of Massachusetts logo and the date 'Thursday, June 23, 2011'. Below the logo is a navigation menu with options like 'Change Password', 'Logoff', 'Employer Home', 'FAQ', 'Workflow - My Inbox', 'Account Maintenance', 'Benefit Charge Activities', 'Correspondence', 'Employment and Wage Detail Reporting', 'Payment Information', and 'User Maintenance'. The main content area is divided into three sections: 'Employer Information', 'Third Party Administrator (TPA) Details', and 'Assigned Roles'. The 'Employer Information' section shows 'Employer Account Number' and 'Employer Name'. The 'Third Party Administrator (TPA) Details' section includes instructions on how to assign and un-assign TPA roles, and displays fields for 'TPA ID', 'TPA Name', 'Address', 'TPA Service Begin Date' (6/23/2011), and 'TPA Service End Date'. A 'Modify' button is located below this section. The 'Assigned Roles' section includes instructions on how to assign roles to individual reporting units and a table with columns for 'Role', 'Reporting Unit Number', 'Reporting Unit Name', and 'Modify'. The table lists three roles: 'Account Maintenance Update and Submit', 'Employment and Wage Detail Update and Submit', and 'Payments Update and Submit'. The 'Employment and Wage Detail Update and Submit' role is assigned to reporting unit '0000' with the name 'UNKN, Boston'. A 'Previous' button is located at the bottom of the table. At the very bottom of the page, there are links for 'Accessibility', 'Privacy Statement', and 'Viewing Tips'.

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**.

This is a close-up of the 'TPA Details' form. It contains the following text: '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.' Below this text is another instruction: 'Using the check boxes in the 'Add' and 'Remove' columns assign the TPA to the roles(s) you would like them to perform.' At the bottom of the form, there are two date input fields: 'TPA Services Begin Date: 1/18/2011 * (mm/dd/yyyy)' and 'TPA Services End Date: 6/23/2011 (mm/dd/yyyy)'. The asterisk indicates that the end date is required.

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
<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 [?]

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

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

Commonwealth of Massachusetts
Friday, June 24, 2011
[Print Preview](#)

Change Password | Logoff

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 Contribution
 ▶ **Third Party Administrator (TPA) Authorization**
Benefit Charge Activities
Correspondence
Employment and Wage Detail 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] 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...

Accessibility | Privacy Statement | Viewing Tips

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

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