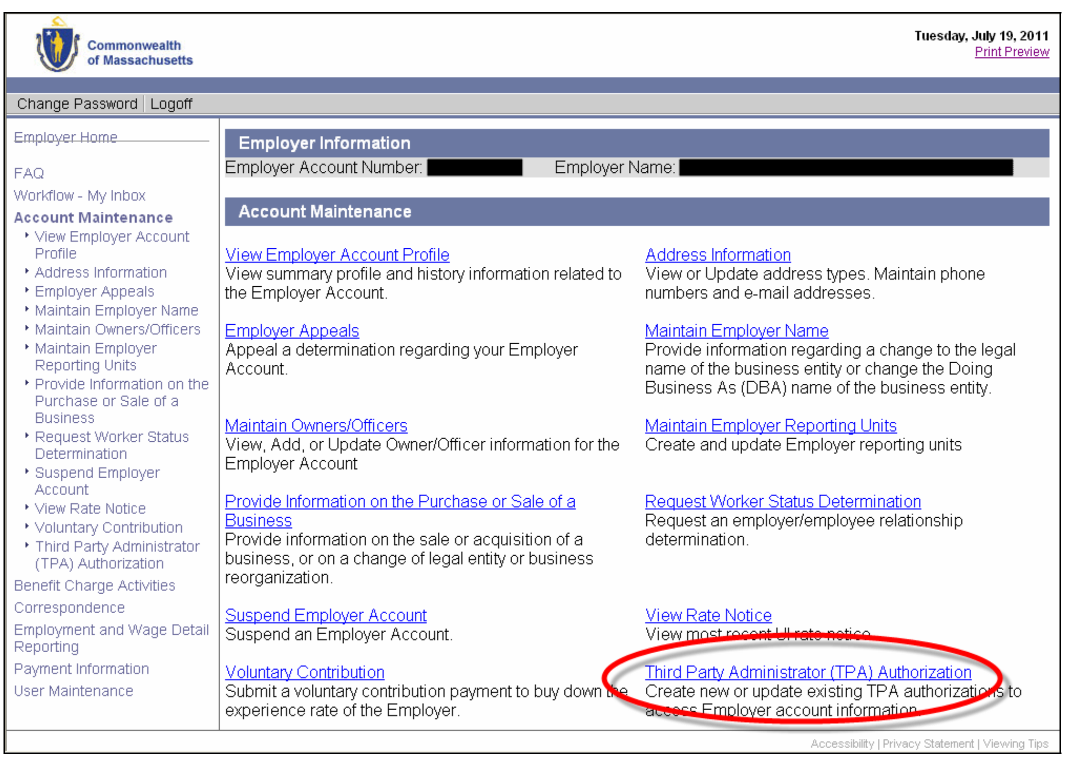
TPA AUTHORIZATION

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

Viewing the TPA Authorization Page

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

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

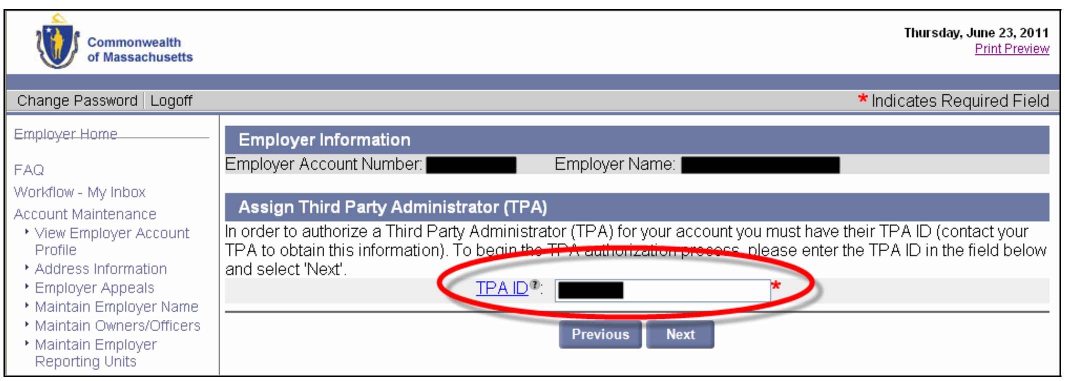


3. The **Third Party Administrator (TPA) Authorization** page appears.

Authorizing a TPA

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

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



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

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

IMPORTANT NOTES:

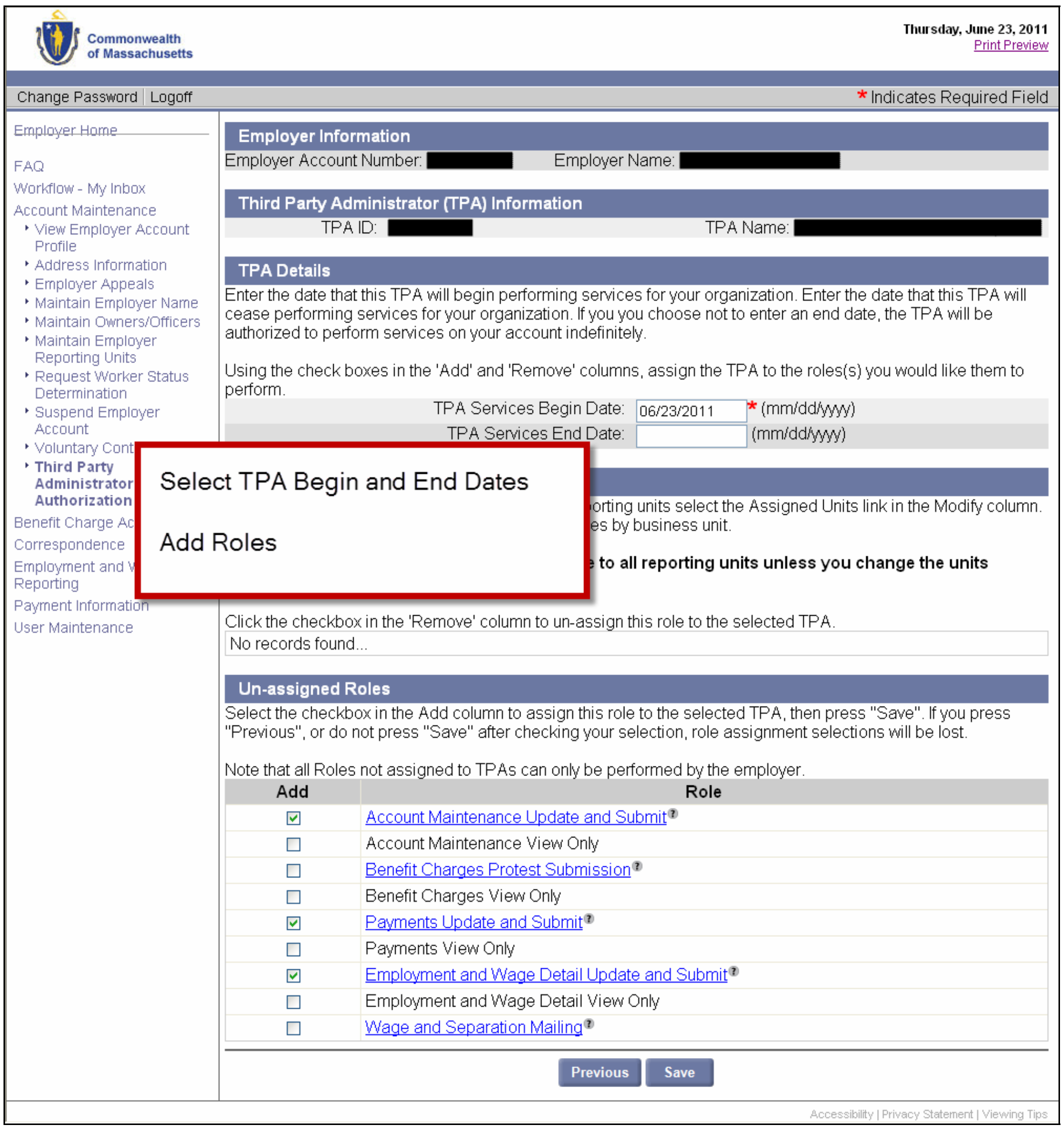
You cannot enter a **TPA Services Begin Date** that is prior to the current date, although once a TPA is authorized, they can perform TPA functions on data retroactively.

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

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

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

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



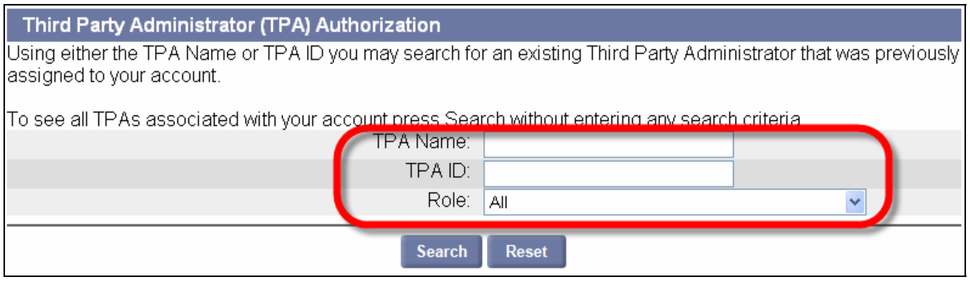
Displaying a List of Your Authorized TPAs

1. Perform the steps in *Viewing the TPA Authorization Page*.

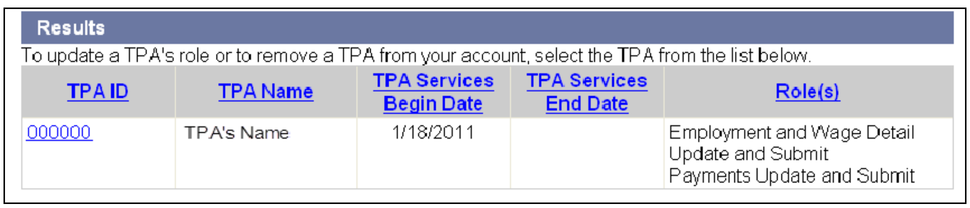
2. Configure search criteria:

   - To see all TPA(s) associated with your Employer account, leave the search criteria blank.
   - To limit your search to a specific TPA, enter the TPA name or ID in the search fields.

   Click **Search**.



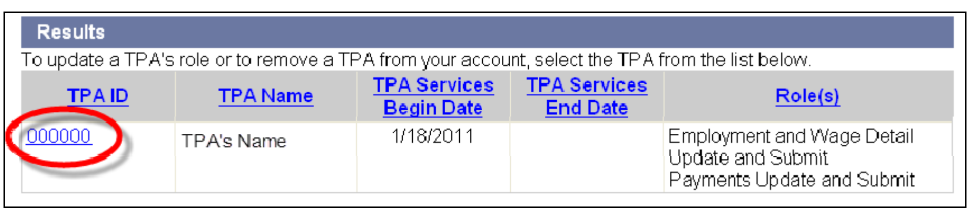
3. The search results appear in the same page, below the search grid.



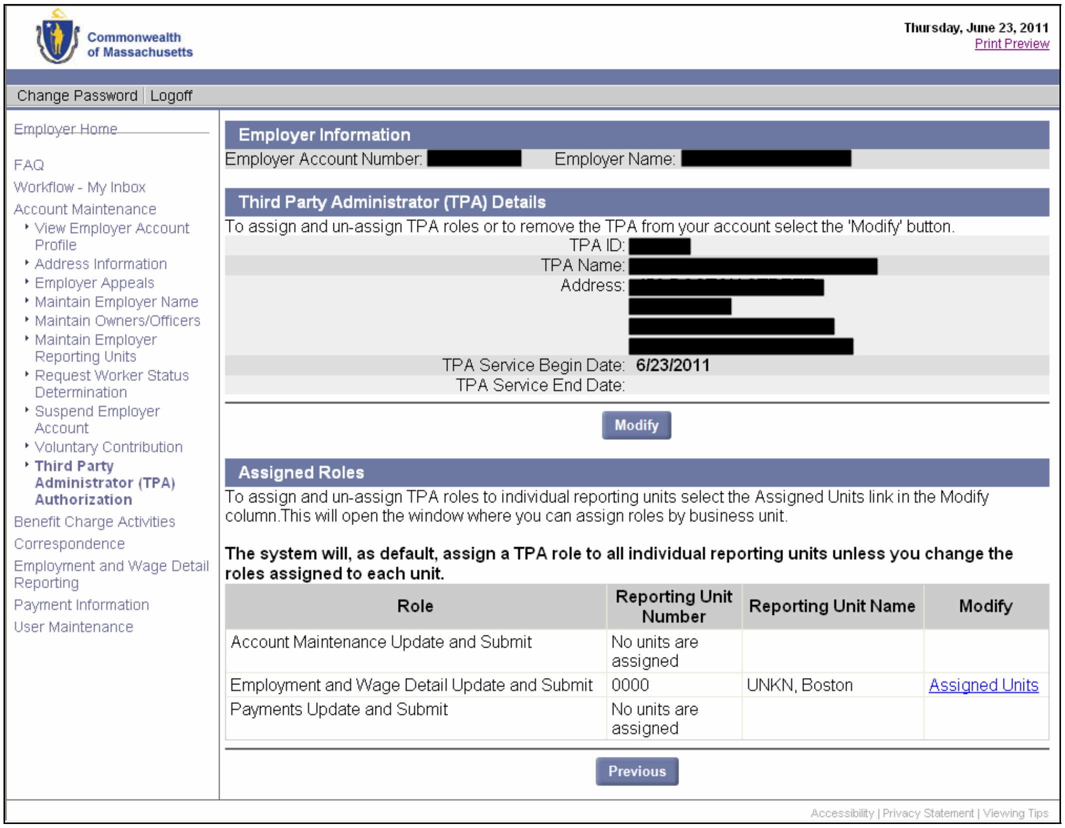
Viewing TPA Authorization Details

1. Perform the steps in *Displaying a List of Your Authorized TPAs*.

2. Click on a **TPA ID** to display authorization details.

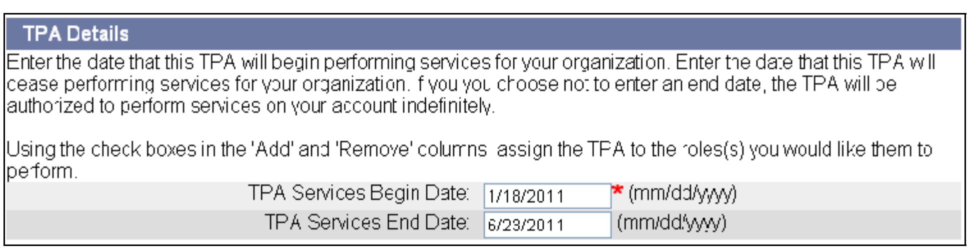


3. The **Third Party Administrator (TPA) Details** page appears.



Modifying a TPA's Service Dates

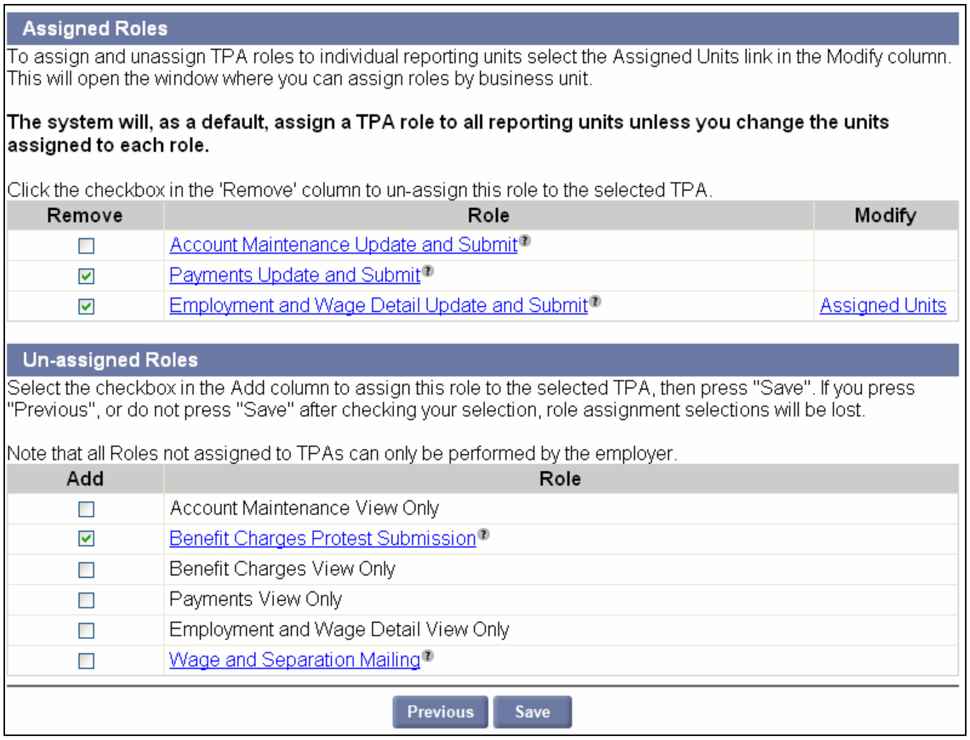
1. Perform the steps in *Viewing TPA Authorization Details*.
2. Click **Modify**.
3. In the **TPA Details** area, change the **TPA Service Start Date** and/or **TPA Service End Date**.



4. Click **Save**.

Adding or Removing TPA Role Assignments

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



Assigned Roles

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

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

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

Remove	Role	Modify
☐	Account Maintenance Update and Submit	
☑	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.

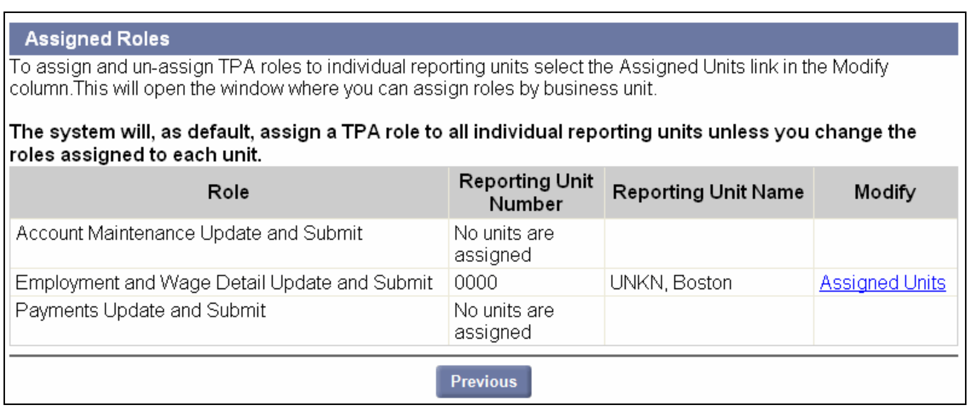
Add	Role
☐	Account Maintenance View Only
☑	Benefit Charges Protest Submission
☐	Benefit Charges View Only
☐	Payments View Only
☐	Employment and Wage Detail View Only
☐	Wage and Separation Mailing

Previous Save

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.

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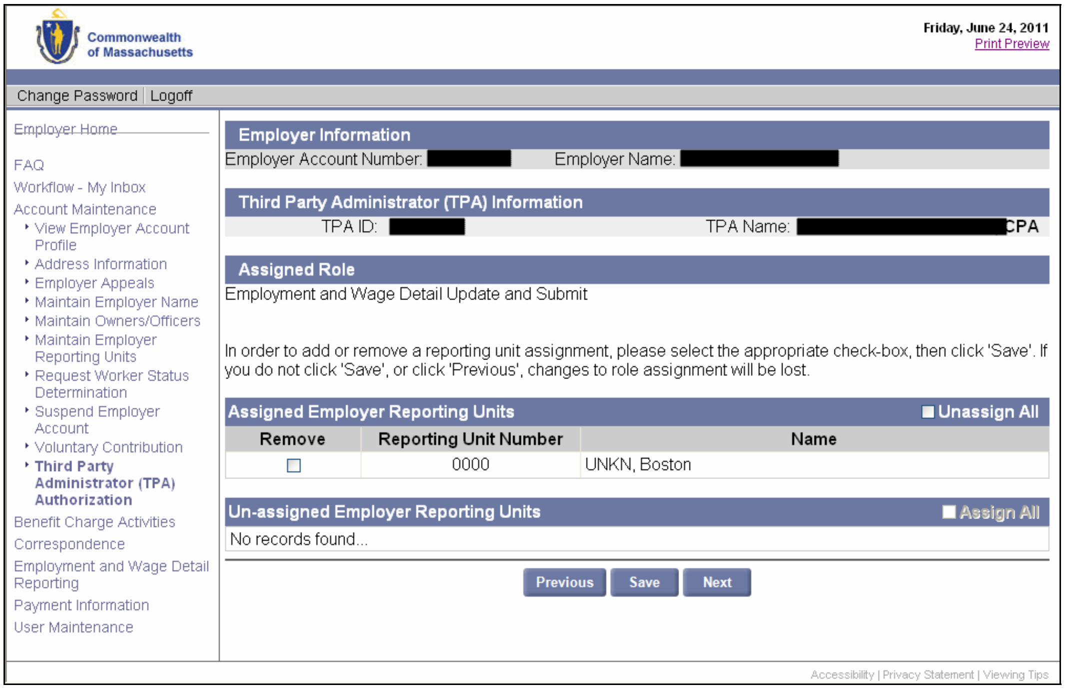
Role	Reporting Unit Number	Reporting Unit Name	Modify
Account Maintenance Update and Submit	No units are assigned		
Employment and Wage Detail Update and Submit	0000	UNKN, Boston	Assigned Units
Payments Update and Submit	No units are assigned		

Previous

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



Ending a TPA's Authorization

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

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

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