



TPA Self Service User Guide

DUA QUEST Project

Department of Unemployment Assistance (DUA)

Commonwealth of Massachusetts

TABLE OF CONTENTS

ABBREVIATIONS	6
UI ONLINE QUICK START	7
HOW TO START WITH UI ONLINE	8
<i>For Regular Users</i>	<i>8</i>
<i>For Administrators</i>	<i>8</i>
GETTING SUPPORT FROM DUA	9
UI ONLINE REQUIREMENTS.....	11
SYSTEM OVERVIEW	12
ACCESSING UI ONLINE	13
<i>First Time Account Access with Emailed Link</i>	<i>13</i>
<i>Logging In</i>	<i>13</i>
<i>Logging Off</i>	<i>14</i>
NAVIGATION AND SOFTWARE TIPS	15
<i>TPA Home Page</i>	<i>15</i>
<i>System Timeout</i>	<i>16</i>
<i>Helpful Hints – Assistive Content</i>	<i>16</i>
<i>Additional Tips.....</i>	<i>16</i>
FORGOTTEN PASSWORD	17
CHANGING A PASSWORD	18
TPA REGISTRATION	19
ABOUT TPA REGISTRATION.....	20
TPA REGISTRATION	20
<i>First Time Login After Registration</i>	<i>23</i>
ACCOUNT MAINTENANCE	25
ABOUT ACCOUNT MAINTENANCE	26
NAVIGATING TO ACCOUNT MAINTENANCE	26

TPA ACCOUNT PROFILE	27
<i>Modifying the TPA Account Profile</i>	<i>27</i>
TPA ADDRESS INFORMATION	28
<i>Navigating to the Address Information Page.....</i>	<i>28</i>
<i>Viewing or Modifying an Address.....</i>	<i>29</i>
<i>Viewing Address History</i>	<i>30</i>
<i>Viewing or Modifying Your Email Address</i>	<i>30</i>
EMPLOYMENT AND WAGE DETAIL REPORTING.....	31
ABOUT EMPLOYMENT AND WAGE DETAIL REPORTING.....	32
NAVIGATING TO EMPLOYMENT AND WAGE DETAIL REPORTING	33
SUBMIT EMPLOYMENT AND WAGE DETAIL FILE.....	34
<i>Performing a Merge or Overwrite</i>	<i>38</i>
SUBMIT EMPLOYMENT AND WAGE DETAIL FILE FOR QUARTERS PRIOR TO 2010	40
VIEW SUBMISSION HISTORY	43
VIEW EMPLOYER HISTORY	45
PAYMENT INFORMATION	47
ABOUT PAYMENT INFORMATION	48
ABOUT DEFERRALS.....	48
NAVIGATING TO PAYMENT INFORMATION	49
DOWNLOAD PAYMENT DUE FILE	50
<i>Downloading the Payment Due File</i>	<i>50</i>
<i>Reading the Payment Due File Format</i>	<i>51</i>
<i>Editing the Payment Due File to Use as the Payment File</i>	<i>51</i>
<i>Uploading the Payment File</i>	<i>52</i>
PAYMENT OPTIONS.....	53
<i>Navigating to the Payment Options Page.....</i>	<i>53</i>
<i>Paying -- Making Full Payment for All Assigned Employers</i>	<i>54</i>

<i>Paying -- Manually Entering Payment Information Online Per Employer</i>	<i>55</i>
<i>Paying -- Making Payment Based on File Upload/Edits</i>	<i>58</i>
<i>Paying – Acting as a Single Employer</i>	<i>60</i>
<i>Applying to DUA to Make Payments Using ACH Credit.....</i>	<i>62</i>
SEARCH PAYMENTS	63
<i>Searching for Payments.....</i>	<i>63</i>
REVIEW EMPLOYER ACCOUNTS/PAYMENT ACCOUNT SUMMARY	655
USER MAINTENANCE.....	677
ABOUT USER MAINTENANCE	68
NAVIGATING TO USER MAINTENANCE	68
CREATING A NEW USER.....	69
SEARCHING FOR USER DETAILS	711
MODIFYING USER INFORMATION.....	733
ASSIGNING USER ROLES.....	744
RESETTING USER PASSWORDS	766
INACTIVATING A USER ACCOUNT	78
REINSTATING A USER ACCOUNT.....	79
ASSIGN EMPLOYERS AND ROLES.....	80
CORRESPONDENCE	822
ABOUT CORRESPONDENCE	833
NAVIGATING TO CORRESPONDENCE.....	833
SEARCHING FOR CORRESPONDENCE	844
SEARCHES - EMPLOYER ACCOUNT ACCESS.....	855
ABOUT SEARCHING TO ACCESS EMPLOYER ACCOUNT HOME	866
NAVIGATING INTO THE EMPLOYER ACCOUNT	866
VIEWING EMPLOYER-ASSIGNED TPA ROLES.....	88
PERFORMING FUNCTIONS AS AN EMPLOYER.....	88

SEARCHES – CLIENT RATE DOWNLOAD	89
ABOUT CLIENT RATE DOWNLOADS	900
SEARCHING TO RETRIEVE A CLIENT RATE DOWNLOAD FILE	900
CLIENT/RATE INFORMATION	922
<i>Format for the Client Rate Download</i>	922
<i>Employer Medical Assistance Contribution Rates</i>	922
<i>Unemployment Insurance Contribution Rate</i>	922
<i>Workforce Training Fund Contribution</i>	922
ADDENDUM	944
A. HOURS WORKED GUIDELINE.....	944
B. EMPLOYMENT AND WAGE DATA SUBMISSION GUIDELINES AND INFORMATION	955
C. ICESA FILE FORMAT SPECIFICATIONS	955
D. EFW2 FILE FORMAT SPECIFICATIONS.....	955
E. DELIMITED FILE FORMAT SPECIFICATIONS	966
F. WAGE DETAIL FILE UPLOAD TROUBLESHOOTING	966
G. LIST OF ERRORS DURING EMPLOYMENT AND WAGE DETAIL UPLOAD	966
H. REGISTRATION TO PAY DUA TAXES VIA ACH CREDIT	1022

Abbreviations

DUA	Department of Unemployment Assistance
DOR	Department of Revenue
EMAC	Employer Medical Assistance Contribution, formerly Unemployment Health Insurance (UHI) prior to January 1, 2014
LLC	Limited Liability Corporation
MA	Massachusetts
SSN	Social Security Number
TPA	Third Party Administrator
UHI	Unemployment Health Insurance
UI	Unemployment Insurance
UI Online	Unemployment Insurance Online
WTF	Workforce Training Fund

UI Online Quick Start

HOW TO START WITH UI Online

Introduction

How you start with UI Online depends on whether you are a **regular user** or an **Administrator** who is **registering** (setting up) and/or configuring the UI Online system so it can be used.

For Regular Users

Regular users can start using UI Online once they are notified that their account is ready. Start with these sections to get up and running:

- *UI Online Requirements*
- *Accessing UI Online*
- *Navigation and Software Tips*

For Administrators

Before regular users can use UI Online, an Administrator must register the TPA with DUA, and create user accounts. In addition, someone at your organization must coordinate with each of your client Employers to authorize you via UI Online to act on their behalf.

Register (Set Up) UI Online

A user who is trusted with administrative access must **REGISTER** the organization with the DUA. Registration is performed from the UI Online area of the DUA website. For detailed instructions, see the section, *TPA Registration*.

IMPORTANT NOTE: If you are a TPA operating with employees who work or live within Massachusetts, then before you can register as a TPA, you must first either **register as an Employer** with the DUA (if you are new Employer) or **activate your account** (if you conducted business with DUA before December 7, 2009). The instructions for Employer Registration and Account Activation are both found in the *UI Online Employer Self Service User Guide*. This document can be found on the DUA website: www.mass.gov/uima.

Create Additional UI Online Users

The person who completes the TPA Registration is assigned the TPA System Administrator role by default. This user receives login credentials to access the UI Online self – service account during the registration.

This user can in turn add additional users to the UI Online Account. Users can be assigned either the TPA System Administrator role, or a TPA User role. For detailed instructions, see the section, *User Maintenance*.

Get Authorization and Role Assignments from your Client Employers

Before you as TPA can conduct business with the DUA on behalf of your client Employers, you must coordinate with each of them to:

- Authorize you as their TPA in UI Online.
- Assign you the Employer Roles in UI Online that allow you to perform the functions you are contracted to perform.

Detailed instructions can be found in the *UI Online Employer Self Service User Guide*.

GETTING SUPPORT FROM DUA

Revenue Service Information Line

617-626-5075

Option 1: Passwords for Employers and TPAs

Password Reset (for permanent passwords only)

Problems with User ID (delete or add new users)

Other issues accessing previously activated or registered account

Option 2: Business Transfers

Change of Ownership

Purchase, sale or transfer of business

Change in organizational type

Reporting new Federal Tax ID number

Option 3: Employer Liability

New Account Registration

Closing an Account

Address change

Method of Payment

Third Party Administrator Update

Account Activation

Temporary User ID Password

Option 4: Employment and Wage Reporting

How to file employment and wage detail reports

How to make payments

Employment and Wage Detail adjustments

Refunds

Payment information

Out of State Wage Detail Credits

ACH Credit Applications

FUTA Certifications

Option 5: Benefit Charges Protest and Submission

Contributory Benefit Charges

Reimbursable Benefit Charges

Bills/Charge Reviews

Seasonal Employer Certification

Option 6: Revenue Collections and Enforcement

Payment Plan

Notice and demand for payments

Tax Liens and Bankruptcy

Tax Intercept

Certificate of Compliance

UI ONLINE - TPA User Guide

Option 7: Revenue Audit in Boston area

Revenue Audit Western Region 413-452-4725

Option 8: Tax Rates

Experience Rating Information
Voluntary Contribution Program
Annual Rate Notice

Wage Processing 617-626-5039

Employers with claims/wage questions
Employer EAN corrections (EIRP)
Applicants requesting alternate base periods
Applicants for missing/incorrect wages or monetary determinations (W-2, pay stubs, Not3xWBA)
Status investigations: Status of Base Period Employer (ie: Employer not Liable, Ceased, Suspended),
Section 2 (form 1099), Section 3, Section 6
Monetary Appeal questions (prior to being referred to Hearings)
Extended Base period

Claimant Overpayment Recovery 617-626-6300

Mass Career Information System 617-626-5718

24-Hour Fraud Hotline 800-354-9927

Hearings Department

Greater Boston Regional Hearings Office 617-626-5200
Northeast Regional Hearings Office (Lawrence) 978-738-4400
Southeast Regional Hearings Office (Brockton) 508-894-4777
West/Central Regional Hearings Office (Springfield) 413-452-4700

Web Address: www.mass.gov/uima

UI Online REQUIREMENTS

To run the UI Online software the following are required:

A connection to the Internet

Web browser software. Any of the following browsers are recommended:

- Microsoft Internet Explorer, versions 6, 7, 8, 9.
- Mozilla Firefox, versions 1, 2.
- Apple Safari, versions 2, 3.
- Netscape Navigator, versions 8, 9.

Adobe Acrobat Reader, versions 7, 8.

IMPORTANT BROWSER SETTINGS:

- Add <https://uionline.detma.org> to the list of Trusted Sites.
- Disable pop-up blockers.

SYSTEM OVERVIEW

Introduction to UI Online	<p>UI Online (Unemployment Insurance Online) is the system that currently provides Employers and Third Party Administrators (TPAs) with a fast, interactive web-enabled way to transact business with the Department of Unemployment Assistance (DUA). These transactions involve in large part the processing of Employer contributions to the Massachusetts UI system. These contributions are part of the revenue from which Claimants who qualify for Unemployment Insurance may be paid. This Revenue system was rolled out in December of 2009. UI Online</p> <p>This user guide is limited to the Revenue System and is intended for use by TPAs accessing UI Online. TPAs should also refer to the <i>UI Online Employer Self Service User Guide</i>; it can be accessed at www.mass.gov/uima.</p>
REVENUE System	<p>The DUA UI Online Revenue System automates the Registration, Wage and Employment Reporting, Tax Calculation and Payment Processes with the following time-saving improvements:</p> <ul style="list-style-type: none">• TPAs and Employers can get complete up-to-date account information and access and maintain their accounts online, via self service.• Employment and Wage Detail reporting including UI, WTF, and EMAC Tax filings can be completed in a single process.• TPAs and Employers can use online processing for quarterly tax filing and either manually enter data, or upload files for larger submissions.• TPAs can process multiple Employer filings at the same time using file uploads.• Employers and Third Party Administrators can make secure online payments.
Disclaimer:	<p>The purpose of this user guide is to help TPAs navigate the UI Online system. It should not be used as a reference for Unemployment Insurance Program policies and procedures. Please refer to the DUA website at www.mass.gov/dua for Unemployment Insurance Program Policies and Procedures.</p>

ACCESSING UI Online

Introduction

This section describes how to access the UI Online system.

- **Most new users** typically access UI Online **for the first time** by clicking the link in an email they receive. See the section, *First Time Account Access with Emailed Link*.
- **After their first time** accessing UI Online, **all users** can log in from the DUA website. See the section, *Logging In*.

IMPORTANT NOTE: The **System Administrator** who registers (sets up) the TPA account accesses UI Online **for the first time** using a special login process that is described in the section on TPA Registration. See the section, *First Time Login After Registration*.

First Time Account Access with Emailed Link

When your System Administrator creates an account for you, the UI Online system automatically generates an email message containing a link.

1. Click the link in the email message to launch a browser with a special login page.
2. Enter a Password of your choosing, select a security question, answer the security question, set a PIN, and click **Save**.

Logging In

If you have previously logged into UI Online, you can log in using the following steps.

1. Navigate to the DUA – UI Online webpage at www.mass.gov/uima.
2. Scroll to the UI Online area of the page. Click **Agent 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 **TPA Login** page, enter the User ID and Password. Click **Login**.

4. When the **TPA Home** page appears you have successfully logged into the UI Online system.

Logging Off

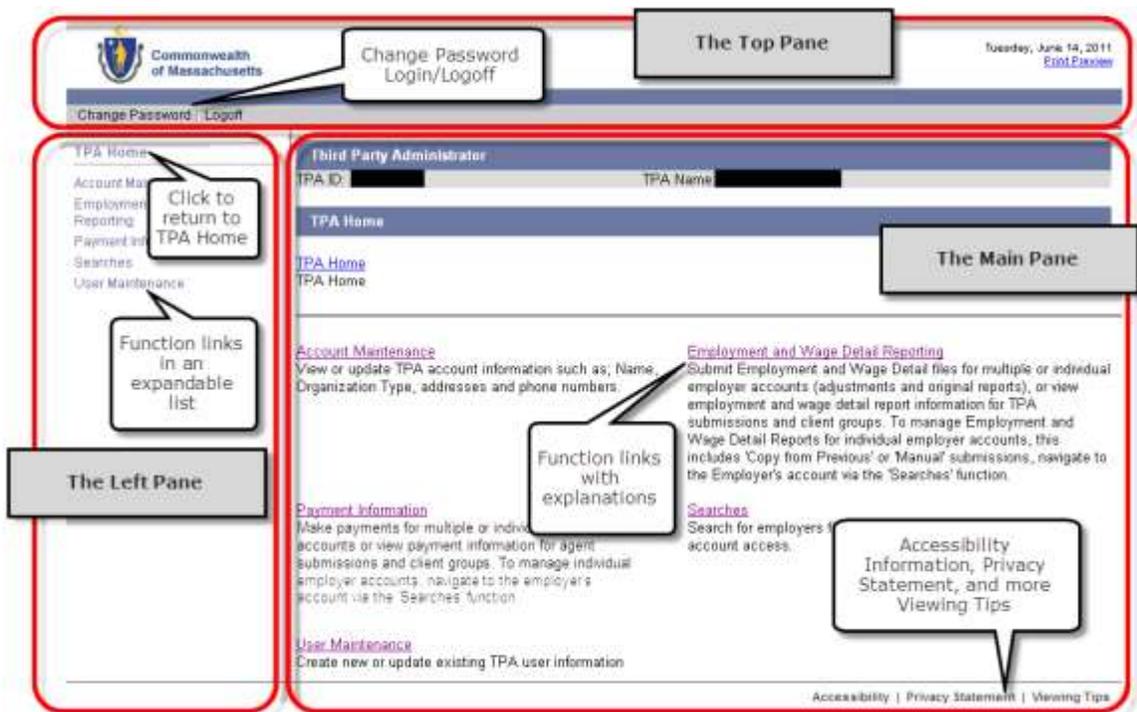
Click **Logout** to end your UI Online session.

NAVIGATION AND SOFTWARE TIPS

Introduction	<p>This section provides tips on navigating and using the UI Online software:</p> <ul style="list-style-type: none"> • The TPA Home page • System Timeout • Helpful Hints – Assistive Content • Additional Tips
--------------	---

TPA Home Page

The first page that appears after you log in to the system is the **TPA Home** page.



The **TPA Home** page has three panes: the **top pane**, the **left pane**, and the **main pane**.

- The **top pane** has links to **Change Password**, **Login**, and **Logoff**.
- The **left pane** has links you can click to bring up the main UI Online **functions**. When you click function links in UI Online, the list in the left pane expands to show the additional functions that are available under the main functions. The left pane also has the **TPA Home** link. Click this link at any time to return to the TPA Home page.
- The **main pane** initially displays the same links to TPA functions as the left pane. It also provides explanations about each function.

If you click a function link, the main pane displays information and controls that are specific to the function.

IMPORTANT NOTE: Not all functions will be accessible all users. The TPA System Administrator at your place of business has configured which function links you can use when you use UI Online.

System Timeout

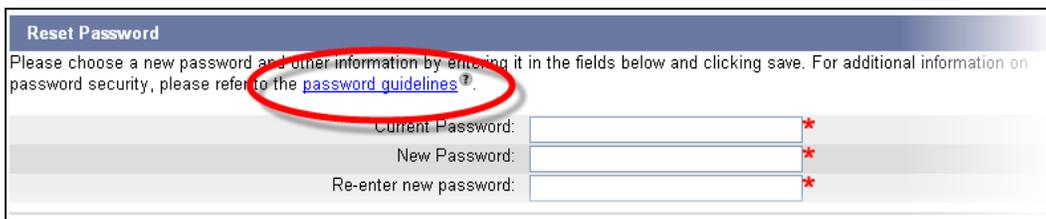
The UI Online system times out after 30 minutes. If you are entering detailed data, save frequently; otherwise if a timeout does occur, the data may be lost. (Save by clicking the **Save** button or by navigating to the next page and then returning to the previous page.)

Helpful Hints – Assistive Content

Most pages in UI Online provide helpful hints about using the software right on screen. In addition, there are links that you can click to bring up a separate window with more in-depth information about a topic. This information is known as **Assistive Content** in UI Online.

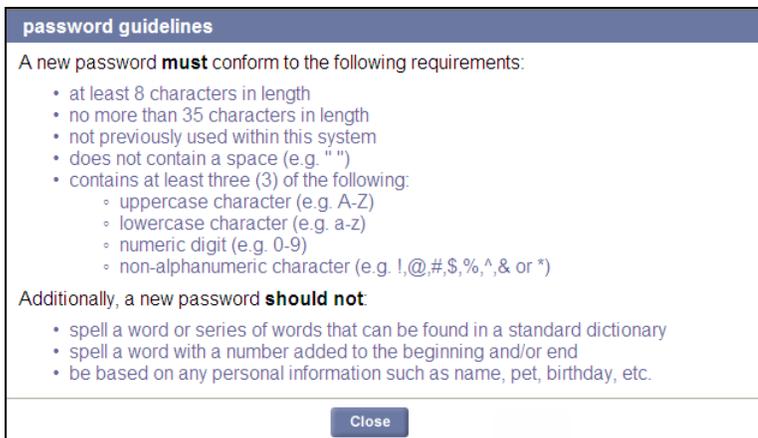
Assistive Content links are blue and underlined, with a small question mark to the right.

An example of an assistive content link for **password guidelines**:



The screenshot shows a 'Reset Password' form with three input fields: 'Current Password', 'New Password', and 'Re-enter new password'. Each field has a red asterisk to its right. A red circle highlights the text 'password guidelines' in the instructions, which is a blue and underlined link with a question mark.

Click the Assistive Content link to display information about the phrase in a separate window.



The screenshot shows a window titled 'password guidelines'. It contains the following text: 'A new password **must** conform to the following requirements:' followed by a bulleted list of requirements. Below this, it says 'Additionally, a new password **should not**' followed by another bulleted list of things to avoid. A 'Close' button is at the bottom.

- at least 8 characters in length
- no more than 35 characters in length
- not previously used within this system
- does not contain a space (e.g. " ")
- contains at least three (3) of the following:
 - uppercase character (e.g. A-Z)
 - lowercase character (e.g. a-z)
 - numeric digit (e.g. 0-9)
 - non-alphanumeric character (e.g. !,@,#,\$,%,& or *)

Additionally, a new password **should not**

- spell a word or series of words that can be found in a standard dictionary
- spell a word with a number added to the beginning and/or end
- be based on any personal information such as name, pet, birthday, etc.

Click **Close** to close the Assistive Content window.

Additional Tips

Do not use your browser's **Back** or **Forward** buttons to navigate in UI Online. Click the **Previous** or **Next** (or Save or Submit) buttons that are provided right on each UI Online page.

Use the **TPA Home** link to return to the top-level TPA Home page at any time.

Data in some **tables in UI Online can be sorted** by column. Columns that can be used for sorting have a **bold blue underlined** column heading. Click the column heading to sort data in the table by that column.

FORGOTTEN PASSWORD

NOTE: If you need to change your password because it has been forgotten, follow these instructions.

1. Navigate to www.mass.gov/uima, and click **Agent Login**.
2. The **Login** page appears. Click **Forgot Password**.

Commonwealth of Massachusetts
Tuesday, June 14, 2011
[Print Preview](#)

Logon * Indicates Required Field

TPA Registration
System Availability
User Guide

Massachusetts Division of Unemployment Assistance : Third Party Administrator Account (TPA)
Login

To access Third Party Administrator (TPA) account information, enter your User Name and Password. For purposes of authentication, using your Password is considered the same as using your signature.

User ID: *

Password: *

3. The **User ID** page appears. Enter your **User ID** and click **Next**.

User ID

In order to reset your password, you need to provide your User ID:

User ID: *

4. The **Verify Alternate Credentials** page appears. Enter Last Name, FEIN, Employee ID, 4-digit PIN Code, and your Security Answer. Click **Submit**.

- Employee ID: The Employee ID is a numeric entry containing a maximum of 8 characters. The Employee ID is an alternate "User" credential which is manually assigned/created by the administrator of the users account. This information is requested for authentication purposes when the user indicates they have forgotten their password.
- 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.

Verify Alternate Credentials

In order to reset your password, please provide the following information:

User ID:

Last Name: *

FEIN: *

Employee ID: *

4 digit PIN Code: *

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

Security Answer: *

NOTE: If you are the user that **registered** the TPA, your Employee ID is the same as the TPA ID. All other users should get their Employee ID from their System Administrator.

5. The **Reset Password** page appears. Enter a new password two times, and re-enter the security answer and the PIN Code. Click **Save**.

• 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](#).

New Password:	<input type="text"/>	*
Re-enter new password:	<input type="text"/>	*
Security Question:	<input type="text" value="What is your father's middle name?"/>	▼ *
Security Answer:	<input type="text"/>	*
4-digit PIN Code:	<input type="text"/>	*

CHANGING A PASSWORD

If you wish to change your password while you are logged in to UI Online, click the **Change Password** link in the upper left corner.

Enter your old password, a new password, security answer, and PIN. Click **Save**.

TPA Registration

ABOUT TPA REGISTRATION

Introduction

If you are an agent authorized to conduct business on behalf of an Employer who is registered with the DUA, you must register your business with the DUA as a **Third Party Administrator (TPA)** using the UI Online system. Registration is required, even if you are an existing TPA already conducting business with the DUA.

The following information is required to register as a TPA:

- Federal Identification Number (FEIN)
- Massachusetts Employer Account Number (EAN) if you have employees who work or live within Massachusetts

IMPORTANT NOTE: If you are a TPA operating with employees who work or live within Massachusetts, then before you can register as a TPA, you must **first** either **register as an Employer with the DUA** (if you are new Employer) **or activate your account** (if you conducted business with DUA before December 7, 2009). The instructions for Employer Registration and Account Activation are both found in the *UI Online Employer Self Service User Guide*. This document can be found on the DUA website: www.mass.gov/uima.

Once your Employer account is registered/activated, return to these instructions to complete the TPA registration. Note that the User ID and Password you use to access your Employer account are distinct from the User ID and Password you use to log in as a TPA.

IMPORTANT NOTE: The person who registers the account is actually creating a user who is assigned the TPA System Administrator role by default. This user has access to all information in the TPA's account and is able to make changes, perform transactions, add additional users to the account, and choose what permissions those users get. This user can also perform functions directly within Employers' accounts. Therefore, the person chosen to register the account should be a highly trusted employee.

TPA REGISTRATION

1. Navigate to the DUA – UI Online webpage at www.mass.gov/uima.
2. Scroll to the UI Online area of the page. Click **Agent 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.

- In the **TPA Login** page, click the **TPA Registration** link in the left pane.

Commonwealth of Massachusetts

Tuesday, June 14, 2011 [Print Preview](#)

TPA Registration

Massachusetts Division of Unemployment Assistance : Third Party Administrator Account (TPA) Login

To access Third Party Administrator (TPA) account information, enter your User Name and Password. For purposes of authentication, using your Password is considered the same as using your signature.

User ID: *

Password: *

Login Forgot Password

- The **Register as a Third Party Administrator** page appears. Enter the requested information. Fields with a red asterisk (*) are required. Click **Next** to continue.

Register as a Third Party Administrator (TPA) - (For Agents/TPA Only)

Enter information to register as a TPA and to obtain login information. This will allow the TPA to act on behalf of another employer after the employer has granted access rights; the employer will have to update their account with the TPA ID code and assign the TPA access to specific employer functions before a TPA may perform those functions.

If you are attempting to register as a Fiscal Intermediary (FI), please contact UI Staff.

If you exit this application prior to submission your information will not be saved.

TPA Name: *

Attention: *

Address Line 1: *

Address Line 2: *

City: *

State:

Zip Code:

Country: *

Phone: ext:

Fax:

E-Mail: *

Organization Type: *

Enter Initial User Information

As initial user, please enter your first and last name:

First Name: *

Last Name: *

Enter Federal Employer Identification Number

Enter the Federal Employer Identification Number (FEIN).

TPA FEIN: *

Enter Employer Account Number

If you are currently registered as a Massachusetts (MA) employer please enter your MA Employer Account Number(EAN).

MA Employer Account Number:

Next

- The **Confirm TPA Registration** page appears. If you need to change any information, click **Modify** to return the previous page. Otherwise, click **Submit**.

Confirm TPA Registration

Please review the following information. Select the Previous button to make any updates to the record.

If no changes are required choose the Submit button.

Please print this page for your own records.

TPA Name:	[REDACTED]
Address:	[REDACTED]
Phone:	[REDACTED]
E-Mail:	[REDACTED]
Organization Type:	[REDACTED]

Initial User

First Name:	[REDACTED]
Last Name:	[REDACTED]

Employer Account Number

MA Employer Account Number:	[REDACTED]
TPA FEIN:	[REDACTED]

Address Information

All correspondence from the Division will be mailed to the above address. Once the account has been established the address may be modified or additional addresses added by logging in to the account and selecting the Account Maintenance.

- The **Login Information** page displays, showing your **User ID**, a system-generated **Temporary Password**, and your **TPA ID**. The registration process is complete. You can log in immediately by clicking **Login**, or close your browser and login later. See the section, *First Time Login After Registration* for instructions.

Login Information

You have successfully registered as a Third Party Administrator in this system.

You will need to provide your TPA ID to employers to gain access to their assigned functions.

User ID:	[REDACTED]
Password:	[REDACTED]
TPA ID:	[REDACTED]

Additional Information

If you did not enter a valid email address during registration, you will not receive file upload confirmations.

Activation Complete

Thank you for providing this information. You have successfully initiated your online, self-service account. Please click the Login button to perform system functions, including the following:

- Create your permanent password
- View existing account information
- Manage account(e.g. enter additional addresses, assign roles, create units)

NOTE: Print the page or write down the information about your User ID, Temporary Password, and TPA ID.

First Time Login After Registration

This section applies only if you are logging in as a TPA for the **first time** after **registering as a TPA**. It describes how to change the UI Online-generated password and establish your security question and PIN.

(If you have previously logged in using these instructions, then you should follow the regular log in procedure in the section: *Logging In.*)

1. If you just registered your TPA account and you just clicked **Home**, skip to **Step 3**.

If you closed your browser before logging in, navigate to the DUA – UI Online webpage at www.mass.gov/uima.

2. Scroll to the UI Online area of the page. Click **Agent 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.

Employer Login **Agent Login**

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.

3. In the **TPA Login** page, enter the User ID and Password you received on screen when you completed account registration. Click **Login**.



Commonwealth of Massachusetts Tuesday, June 16, 2011 [Print Page](#)

Lagon * Indicates Required Field

TPA Registration
System Availability
User Guide

Massachusetts Division of Unemployment Assistance : Third Party Administrator Account (TPA) Login

To access Third Party Administrator (TPA) account information, enter your User Name and Password. For purposes of authentication, using your Password is considered the same as using your signature.

User ID: *

Password: *

- The **Reset Password** page appears. Enter the current password and a new password, select a security question, answer the question, and enter a 4-digit PIN code. Click **Save** to continue.

Third Party Administrator

TPA ID: XXXXXXXXXX TPA Name: XXXXXXXXXX

- 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: *

4-digit PIN Code: *

- When the **TPA Home** page appears you have successfully logged into the UI Online system.


Commonwealth of Massachusetts
Tuesday, June 14, 2011
[Print Page](#)

[Change Password](#) | [Logout](#)

[TPA Home](#)

[Account Maintenance](#)

[Employment and Wage Detail Reporting](#)

[Payment Information](#)

[Searches](#)

[User Maintenance](#)

Third Party Administrator

TPA ID: XXXXXXXXXX TPA Name: XXXXXXXXXX

TPA Home

[TPA Home](#)
TPA Home

[Account Maintenance](#)
View or update TPA account information such as, Name, Organization Type, addresses and phone numbers.

[Payment Information](#)
Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function.

[User Maintenance](#)
Create new or update existing TPA user information

[Employment and Wage Detail Reporting](#)
Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function.

[Searches](#)
Search for employers for which the TPA has been assigned account access.

[Accessibility](#) | [Privacy Statement](#) | [Helping You](#)

Account Maintenance

ABOUT ACCOUNT MAINTENANCE

Introduction

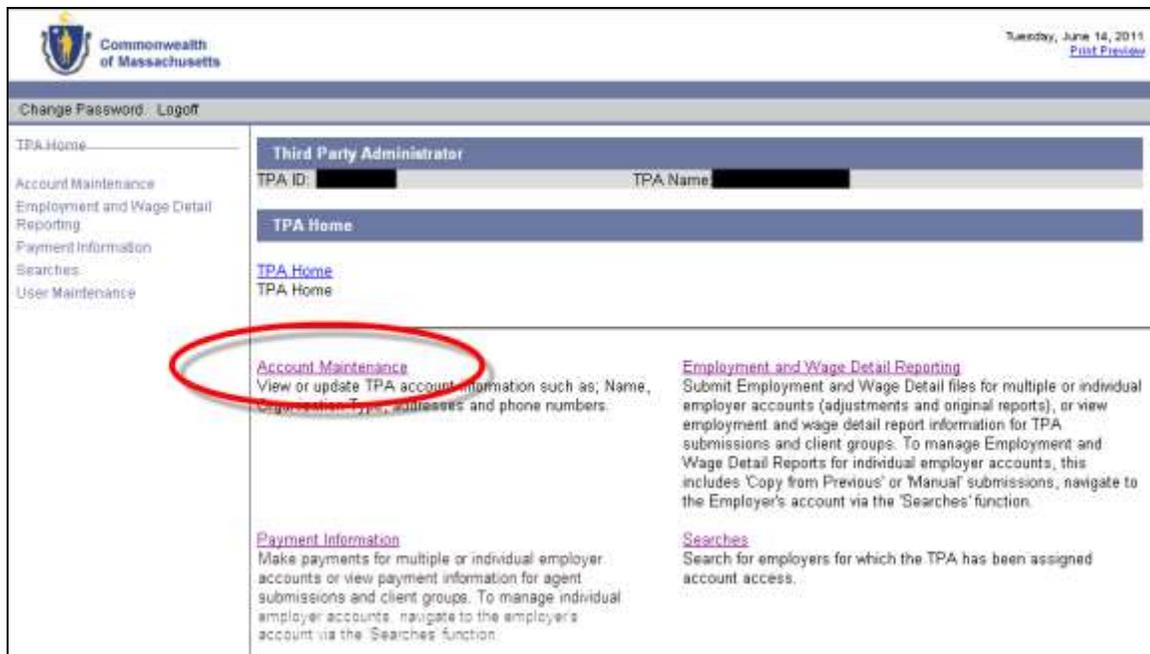
This section describes how to use the functions available from the Account Maintenance page. Functions include:

- Account Profile
- Address Information

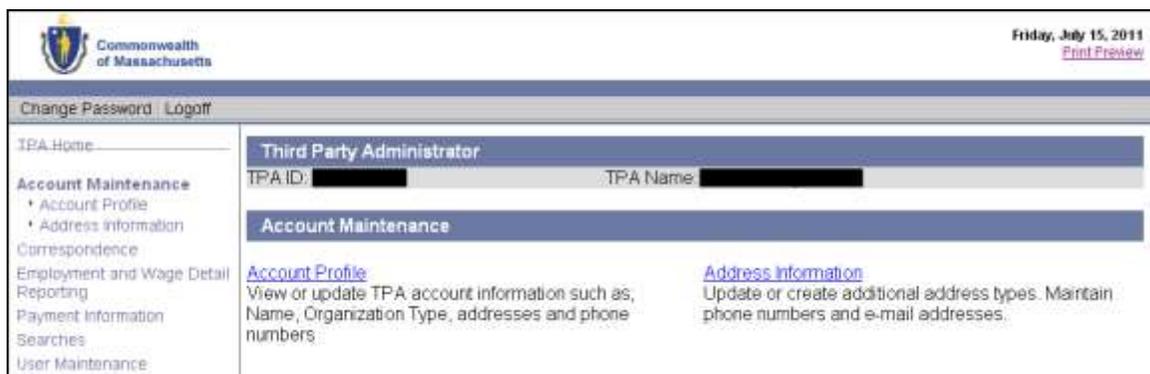
NAVIGATING TO ACCOUNT MAINTENANCE

To navigate to Account Maintenance, perform the following steps:

1. Log in to UI Online. Click the **Account Maintenance** link (the link appears in the left pane and the main pane of the TPA Home page).



2. The **Account Maintenance** page appears. Available account maintenance functions are listed in links in the left pane as well as the main pane. The main pane also displays explanations of the functions. Click a link to access a function.



TPA ACCOUNT PROFILE

Introduction

The **TPA Account Profile** page displays the following information about a TPA Account:

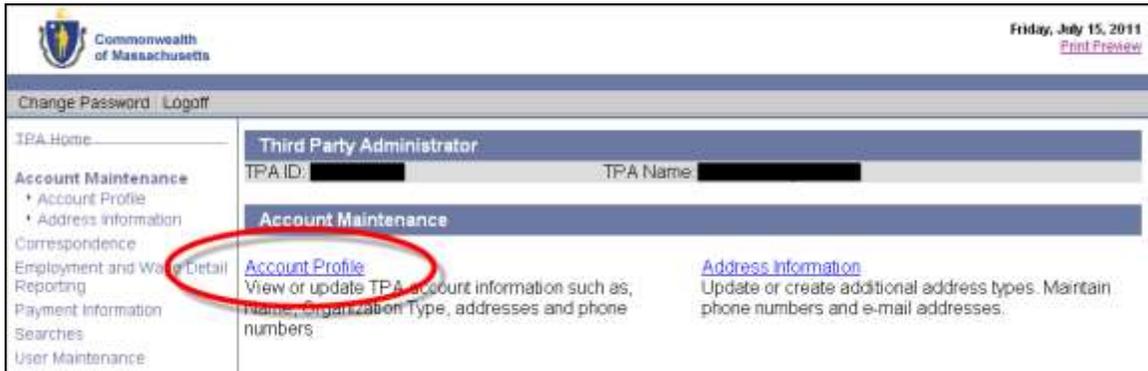
- TPA ID
- TPA Name
- Employer Account Number (EAN)
- Federal Employer Identification Number (FEIN)
- Organization Type

The account profile elements that can be modified under this maintenance activity are: **TPA Name** and **Organization Type**.

Modifying the TPA Account Profile

Navigate to the **Account Profile** page by performing the following steps:

1. Log in to UI Online and click **Account Maintenance**.
2. Click the **Account Profile** link.



3. The **Account Profile** page appears. Revise the **TPA Name** or the **Organization Type**. Click **Save**.

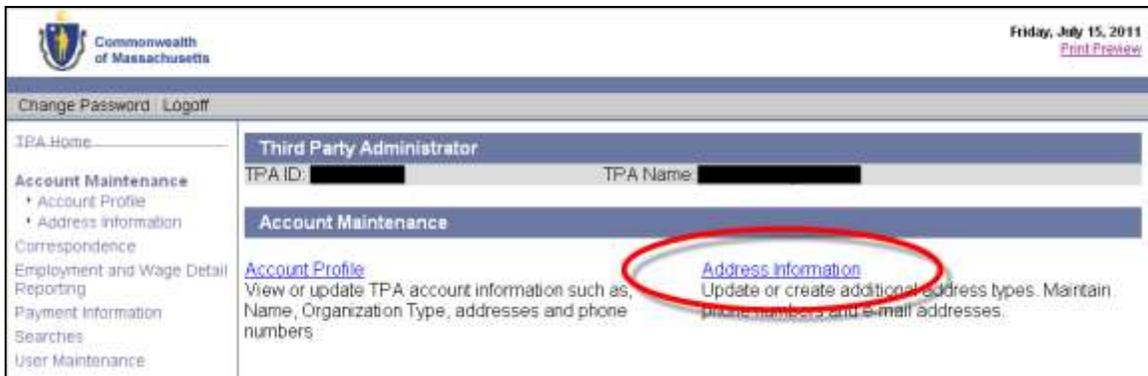
A screenshot of the 'Account Profile' form. The form is titled 'Third Party Administrator' and contains the following fields: 'TPA ID:' followed by a blacked-out value, and 'TPA Name:' followed by a blacked-out value. Below this is the 'Account Profile' section with the following fields: 'TPA ID:' followed by a blacked-out value, 'TPA Name:' followed by a text input field containing a blacked-out value, 'Employer Account Number:' followed by a text input field containing a blacked-out value, 'FEIN:' followed by a blacked-out value, and 'Organization Type:' followed by a dropdown menu with 'Other' selected. A 'Save' button is located at the bottom center of the form.

TPA ADDRESS INFORMATION

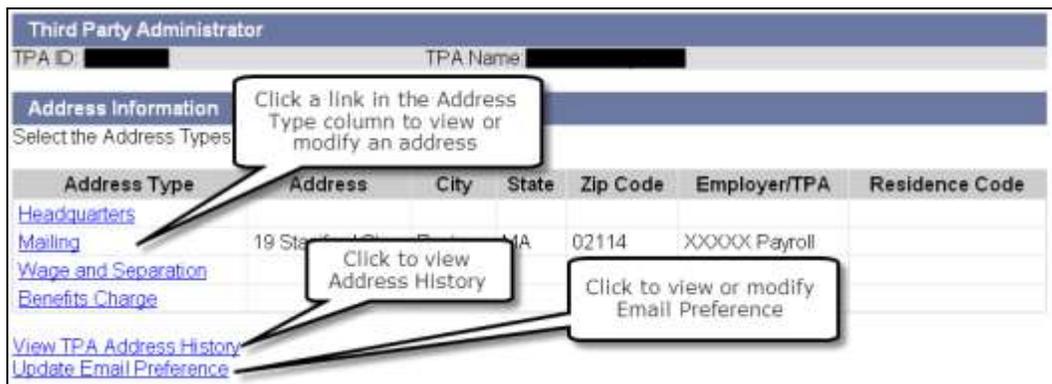
Introduction	<p>This section describes how to:</p> <ul style="list-style-type: none"> View and modify the primary address information on a TPA account. View TPA address history. View and modify your primary email address.
Additional Information	<p>A TPA account can have up to four different types of addresses:</p> <ul style="list-style-type: none"> Headquarters Mailing Wage & Separation Benefits Charge

Navigating to the Address Information Page

1. Log in to UI Online and click **Account Maintenance**.
2. Click the **Address Information** link.



3. The **Address Information** page appears. The page has links that allow you to:
 - View and modify each type of address
 - View an address history with list events associated with address changes in the past.
 - View or modify Email Preferences



Viewing or Modifying an Address

1. Display the **Address Information** page using the instructions in the previous section.
2. Click one of the links in the **Address Type** column to display details for that address type (if any).
3. On the **Modify Address** page, make changes as necessary and click **Save**.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Modify Address

Enter address information below and click 'Save'.

Address Type: Mailing

Attention: [REDACTED]

Address Line 1: [REDACTED]

Address Line 2: [REDACTED]

City: Boston

State: MA - Massachusetts

Zip Code: 02114

Country: [REDACTED]

Phone: [REDACTED] ext: [REDACTED]

Fax: [REDACTED]

E-Mail: [REDACTED]

Previous Save

4. On the **Address Validation** page, select the closest address match. If applicable, select the address with the 9-digit extended Zip code (known as "Zip +4"). Click **Next**.
5. Review the changes (if any) displayed in the **Confirm Address** area.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Confirm Address

Please confirm the address you have provided. If you would like to change the information you have provided, please select 'Previous'. To associate additional address types with the address you have provided, you may choose from the address types below and select 'Submit'.

Address Type: Mailing

Address: [REDACTED]

Phone: [REDACTED]

E-Mail: [REDACTED]

Update Additional Addresses

Select applicable address types that should have the same address as listed above.

Headquarters

Benefits Charge

Wage and Separation

Previous Submit Cancel

6. Optional: update other addresses with the same information by checking an additional address box.
7. Click **Submit** to save the changes. (Click **Previous** to return to the **Modify Address** page. Click **Cancel** to return to the **Address Information** page.)

Viewing Address History

1. Perform the steps in the section, *Navigating to the Address Information Page*.
2. Click **View Employer Address History**.
3. The **Address Historical Information** page appears. Select an **Address Type** and click **Search**.

4. View the search results displayed below the search grid.

Search Results						
Address Type	Attention	Address	Phone	Email	Modified On	Modified By
Headquarters		19 Staniford St Boston MA 02114			7/15/2011	
Mailing		19 Staniford St Boston MA 02114			7/15/2011	
Mailing		19 Staniford St Boston MA 02114			7/15/2011	

NOTE: If you need to clear the results and the search parameters click **Reset**. To return to the **Address Information** page click **Previous**.

Viewing or Modifying Your Email Address

1. Perform the steps in the section, *Navigating to the Address Information Page*.
2. Click **Update Email Preference**.
3. The **Email Preference** page appears. Enter your email address in the **Contact Email** field.

4. Click **Submit**.

Employment and Wage Detail Reporting

ABOUT EMPLOYMENT AND WAGE DETAIL REPORTING

Introduction

TPAs can submit Employment and Wage Detail via **file upload** for multiple or individual Employer accounts (adjustments and original reports) from the **Employment and Wage Detail Reporting** function via the **TPA Home** page.

The submission procedure changed starting in 2010. This section includes both procedures:

- Submit Employment and Wage Detail File (for 2010 and forward)
- Submit Employment and Wage Detail File for Quarters Prior to 2010

In addition, this section describes how to view employment and wage detail report information for TPA submissions and client groups:

- View Submission History
- View Employer History

NOTE: TPAs can also navigate into an **individual** Employer account to file a "No Employment and Wage Detail Report," to "Copy from Previous" (Quarter,) or to manually submit employment and wage detail. TPAs navigate into the Employer's account via the **Search** function. See the section, *Searches - Employer Account Access*, for instructions. See the *UI Online Employer Self Service User Guide* for instructions on using Employer functions for employment and wage detail reporting.

NOTE: Paper reports and paper checks issued by TPAs will not be accepted by DUA.

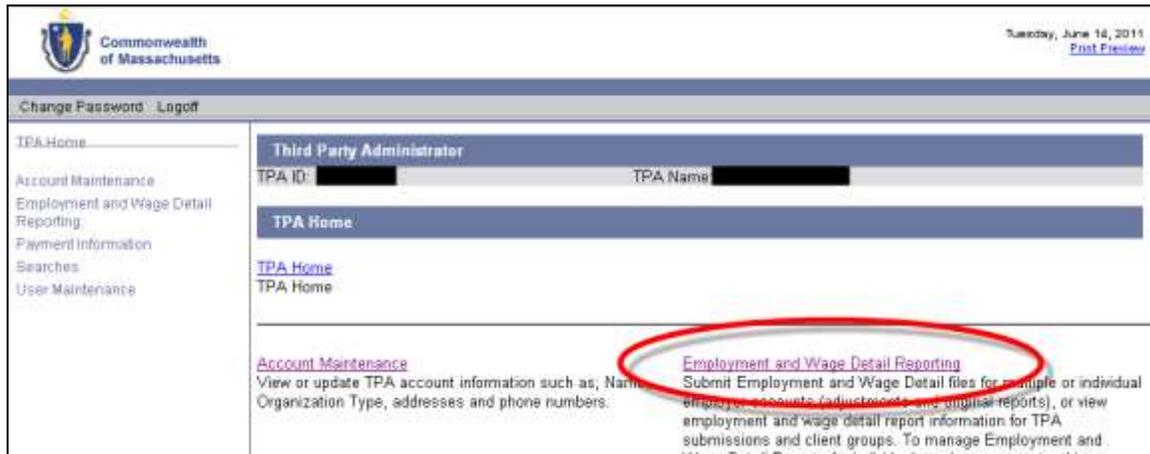
NOTE: If a TPA has more than \$1,000 in debt to the DUA on their own Employer Account, they are not allowed to file employment and wage detail reports for their clients.

IMPORTANT NOTE: Your TPA account must have the required roles before you can submit employment and wage detail reports for each assigned Employer account. Coordinate with each Employer to get required roles assigned to you.

NAVIGATING TO EMPLOYMENT AND WAGE DETAIL REPORTING

To navigate to the **Employment and Wage Detail Reporting** page, perform the following steps:

1. Log in to UI Online. Click the **Employment and Wage Detail Reporting** link (the link appears in the left pane and the main pane of the **TPA Home** page).



2. The **Employment and Wage Detail Reporting** page appears. Available functions are listed in links in the left pane as well as the main pane. The main pane also displays explanations of the functions. Click a link to access a function.

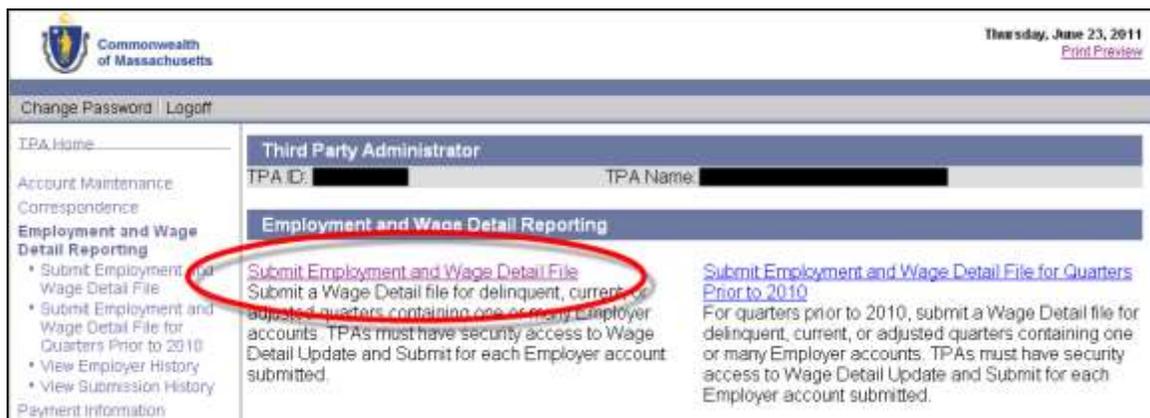


SUBMIT EMPLOYMENT AND WAGE DETAIL FILE

<p>Introduction</p>	<p>This section describes how to submit employment and wage detail files for assigned Employer accounts, for 2010 and forward. Note that only the File Upload method can be used from the TPA Home page, whether for one or multiple Employers. (If you wish to submit employment and wage detail reports using any other method from the individual Employer account, see the <i>Employment and Wage Detail Reporting</i> section of the <i>UI Online Employer Self Service User Guide</i>.)</p> <p>NOTE: If you wish to submit employment and wage details for quarters prior to 2010, see the section, <i>Submit Employment and Wage Detail File for Quarters Prior to 2010</i>.</p>
<p>File Upload method:</p>	<p>Three different file types can be used with the file upload method: ICESA, EFW2 and Delimited. Key facts about file upload method are:</p> <ul style="list-style-type: none"> • The file upload method can be used to process up to 29,999 records. If you have 30,000 or more records, please contact DUA at 617-626-5075, Option 4. • The uploaded wage detail files will be processed immediately if your file contains up to 299 records. If you have 300 or more records, your file will be processed as part of an overnight scheduled batch. You should be able to view the status of your submission the following day, using the View Submission History link. • The process for uploading ICESA, EFW2 or Delimited files is identical, even though the file formats are different. • For information about the ICESA, EFW2, or Delimited file formats, see the document: <i>Employment and Wage Detail Guidelines and Information</i>. To locate the document go to the main website, http://www.mass.gov/uima, and click the Quarterly Employment and Wage Submission link under the Key Resources topic.

Perform these steps to submit the employment and wage detail file:

1. Click **Employment and Wage Detail Reporting**.
2. Click **Submit Employment and Wage Detail File**.



- The **File Format** page appears. Select **Delimited**, **ICESA**, or **EFW2** and click **Next**.

NOTE: This example shows a file upload for a Delimited file, but the procedure is the same for the other two formats as well.

The screenshot shows the 'Third Party Administrator' interface. At the top, there are fields for 'TPA ID' and 'TPA Name'. Below this is a progress bar for the 'Employment and Wage Detail Submission Process' with three steps: 1. Submit Wage Information, 2. Confirm Submission, and 3. Process and Calculate, leading to 'COMPLETE'. The main section is titled 'File Format' and contains two bullet points: 'For details related to the most current file formats, select the appropriate link below.' and 'For details related to multiple file submissions or third party administrators (TPA) filings, click [here](#)'. Below the text is a table with three columns: 'File Type', 'Record Length', and 'File Extension'. The 'Delimited' option is selected with a radio button and circled in red. The table lists three options: 'Delimited' (Variable record length, .bt or .csv extension), 'ICESA' (275 record length, .bt extension), and 'EFW2' (512 record length, .bt extension). A 'Next' button is located at the bottom of the page.

File Type	Record Length	File Extension
<input checked="" type="radio"/> Delimited [?] (i.e., export from Excel with a comma delimiter)	Variable	.bt or .csv
<input type="radio"/> ICESA [?] (NASWA Standard File Format)	275	.bt
<input type="radio"/> EFW2 [?] (Formally MMREF-SSA)	512	.bt

- The **Select Wage Detail File** page appears. Click **Browse**. Navigate to and select the upload file. Click **Next** to process the file.

The screenshot shows the 'Third Party Administrator' interface. At the top, there are fields for 'TPA ID' and 'TPA Name'. Below this is a progress bar for the 'Employment and Wage Detail Submission Process' with three steps: 1. Submit Wage Information, 2. Confirm Submission, and 3. Process and Calculate, leading to 'COMPLETE'. The main section is titled 'Select Wage Detail File' and contains the instruction: 'Choose file by selecting the 'Browse' button. Once the file is selected, click 'Next''. Below the text is a file selection input field with a 'Browse...' button. At the bottom of the page are 'Previous' and 'Next' buttons.

- If there are no errors, the **Summary of Units Reported** page appears listing wage detail by Employer Account Number and reporting unit. Click **Next** to continue with the wage detail submission. Click **Save and Exit** if you wish to return later.

Third Party Administrator

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

Employment and Wage Detail Submission Process

Summary of Units Reported

Employer Account Number	Unit Number	Business Name	Year	Quarter	Total UI Gross Wages	Number of Records	Month #1	Month #2	Month #3
[REDACTED]	0	[REDACTED]	2010	October, November, December (Q4)	\$210,047.27	27	27	27	27
[REDACTED]	0	[REDACTED]	2010	October, November, December (Q4)	\$210,047.27	27	27	27	27

Previous
Save and Exit
Next

NOTE: If your file contains at least 300 records, it will not be processed immediately. You will get a message stating that the records will be processed in an overnight batch. To view the status of your submission, click **View Submission History** on the **Employment and Wage Detail** page on the next business day.

Third Party Administrator

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

The following issue was detected with your submission:

Notices

- Due to the size of the file delimited_template101969.csv, the employment and wage detail will be processed in an overnight batch. Please check back tomorrow in View Submission History for results (634)

Employment and Wage Detail Submission Process

Select Wage Detail File

Choose file by selecting the 'Browse' button. Once the file is selected, click 'Next'.

- The **Employment and Wage Detail Certification** page appears. Check the certification box and click **Next**.

Third Party Administrator

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

Employment and Wage Detail Submission Process

1 →
 2 →
 3 → COMPLETE

Submit Wage
Information

Confirm
Submission

Process and
Calculate

Employment and Wage Detail Certification

You are asked to certify that all of the information provided in this filing is 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.

I certify, under penalties of perjury, that all information provided in this filing is complete and true to the best of my knowledge and belief.*

Previous
Next

- The **Quarterly Calculations** page appears, displaying the quarterly contributions due for each Employer. Review the data.

NOTE: To review the data in detail, click the **Quarterly Amount Due** for a specific Employer. Details display on **Reporting Information** for the Employer, from within the Employer account. The page displays differently, according to whether the submission is original, or an adjustment.

Third Party Administrator

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

Employment and Wage Detail Submission Process

1 →
 2 →
 3 → COMPLETE

Submit Wage
Information

Confirm
Submission

Process and
Calculate

Quarterly Calculations

Employer Account Id	Year	Quarter	Submission Type	Total UI Gross Wages	Quarterly Amount Due
[REDACTED]	2010	October, November, December (Q4)	Adjustment #2	\$210,047.27	\$6,070.37
[REDACTED]	2010	October, November, December (Q4)	Original	\$210,400.00	\$10,257.12
[REDACTED]	2010	October, November, December (Q4)	Adjustment	\$210,047.27	\$7,628.00

Click Quarterly Amount Due to view details

Previous
Submit

- If the data uploaded so far is **incorrect**, the file can be corrected and uploaded again without having to perform an Adjustment as long as you **do not click Submit** at this point. See *Performing a Merge or Overwrite*.
- If the data uploaded so far is correct, click **Submit** to continue.

8. The Employment and Wage Detail Report Submission Confirmation appears. If desired, click **Make Payment**. See *Payment Information* for Payment Options and procedures.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Employment and Wage Detail Submission Process

1 → 2 → 3 → COMPLETE
Submit Wage Information Confirm Submission Process and Calculate

Employment and Wage Detail Report Submission Confirmation

- Thank you for using our online Employment and Wage Detail Submission process. You have successfully submitted an Employment and Wage Detail Report for Quarter 2 of Year 2011.
- Your confirmation number is **06231116023**. For future reference, this number is in View Submission History.
- If you would like to make a payment for amounts due select 'Make Payment' at the bottom of this page.
- If you are closing your business and this is your final Employment and Wage Detail Report Select 'Account Maintenance' then 'Suspend Account' from the left navigation and proceed with the prompts.

Make Payment

Performing a Merge or Overwrite

If at the point of submitting Employment Wage and Detail information via file upload, you realize that the data is incorrect, you can upload the data again without performing an Adjustment.

1. Do NOT click **Submit**.
2. Correct the file.
3. Click **Previous** on successive pages until you have returned to the **Browse for file** page.
4. Select the corrected file and click **Next** until you reach the **Select Action** page.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Employment and Wage Detail Submission Process

1 → 2 → 3 → COMPLETE
Submit Wage Information Confirm Submission Process and Calculate

Select Action

- Our records indicate that you have already saved Wage Detail information for this quarter and year. Please select an action.

Delete existing information and replace with new file.

- All stored records will be replaced
- The records from the most recent filing will be used for the calculation

Merge current and save Wage Detail information for this quarter and year.

- Click [here](#) for Merge Rules

Previous **Next**

5. Select to either **delete** the records or **merge** them and click **Next** to continue with the upload. (See below for Merge Rules.)

Employer Merge Rules

Wage Detail Merge Rules:

When requested to merge, the System will merge distinct employee records at the unit level.

If an employee(s) exist within the same reporting unit while merging data for the same reporting unit the System will overwrite the previous employee data with the employee data from the latest filing. Please note: employee level merge (replace/add) has no ability to delete employees.

For example:

Employer user Jane saves an employment and wage detail file with the following reporting units:

- 0001
- 0003
- 0005
- 0007
- 0009

Employer user Bill follows Jane and uploads the following reporting units:

- 0000
- 0002
- 0004
- 0005
- 0006
- 0008
- 0009
- 0010

Jane and Bill have submitted two common units, 0005 and 0009. The System will keep Jane's units 0001, 0003, and 0007. The System will merge Jane's units 0005 and 0009 with Bill's 0005 and 0009 at the employee level. If the same employee(s) exist within unit 0005 and 0009 for both Jane and Bill's files, then the System will use the records from Bill's seeing that it is the latest filing.

The final submission will include the following units for calculation:

- 0000 (from Bill)
- 0001 (from Jane)
- 0002 (from Bill)
- 0003 (from Jane)
- 0004 (from Bill)
- 0005 (from Bill)
- 0006 (from Bill)
- 0007 (from Jane)
- 0008 (from Bill)
- 0009 (from Bill)
- 0010 (from Bill)

If the employer does not report using units and Employee A is in both files, (File 1 being uploaded first and file 2 being uploaded subsequently), the System will overwrite the Employee A record from file 1 with the Employee A record from file 2.

If employees A, B, D, and E are in File 1; and C, F, G, H are in file 2; submit A, B, C, D, E, F, G, and H.

If A, B, and D are in File 1 and B, C, and E are in File 2. Submit A and D from file 1 and B, C and E from file 2.

Close

SUBMIT EMPLOYMENT AND WAGE DETAIL FILE FOR QUARTERS PRIOR TO 2010

Introduction

This section describes how to submit an employment and wage detail file for one or multiple Employer accounts for quarters prior to 2010. The instructions here are applicable only if you are using the 'File Upload method.' If you wish to submit employment and wage detail reports using any other method from the individual Employer account, please refer to the *Employment and Wage Detail Reporting* section of the *UI Online Employer Self Service User Guide*.

IMPORTANT NOTE: TPAs should use the old bulk file format specifications for creating separate files for UI and EMAC submissions. See the Key Resources / *Quarterly Employment & Wage Submission / Wage Detail File Format - 2009 and Prior*, available on www.mass.gov/uima.

The file format for uploading UI Gross wages and EMAC gross wages has not changed, when you are submitting these reports for quarters prior to 2010. At the same time, please note that you will not be able to use this method for Quarters beginning 2010.

1. Click **Employment and Wage Detail Reporting**.
2. Click **Submit Employment and Wage Detail File for Quarters Prior to 2010**.



3. The **Upload UI and EMAC Files** page appears.
 - Click **Browse** under the **Select UI** Tax Transmission Report File area. Navigate to and select your **UI Wage Detail** file.
 - Click **Browse** under the **Select EMAC** Tax Transmission Report File area. Navigate to and select your **UHI Wage Detail** file.
 - Click **Next**.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Upload UI and UHI Files	
<ul style="list-style-type: none">• For 4th quarter of 2009 filing instructions click here.• To upload the necessary UI and UHI files choose file by selecting the 'Browse' button. Once files are selected, click 'Next'.• If you have already uploaded a UI and/or UHI file and would like to upload a wage detail file only, select 'Next'.• File names are limited to a maximum of 35 characters, excluding the file extension.• Uploaded files will be processed in an overnight batch. Please check back next day to view submission details.	
Select UI Tax Transmission Report File	
File Name must start with UI.	<input type="text"/> <input type="button" value="Browse..."/>
Select UHI Tax Transmission Report File	
File Name must start with UHI.	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Next"/>	

4. Both the UI file and EMAC file will be uploaded to UI Online and will be processed by a batch process that runs daily. After the upload is complete, the **DOR Wage Detail Option** page appears, asking if you wish to submit the DOR wage detail files. Select **Yes** or **No** and click **Next**.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
DOR Wage Detail Option	
Would you like to submit DOR Wage Detail? <input type="radio"/> No <input type="radio"/> Yes*	
<input type="button" value="Previous"/> <input type="button" value="Next"/>	

5. If you selected **Yes** in **Step 4**, skip to **Step 6**. If you selected **No**, the **Employment and Wage Detail Report Submission Confirmation** page appears. The submission process is complete. Either click **Exit**, or click **Make Payment** and see the section *Payment Information* for instructions. (Do not perform the rest of the steps in this section.)

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Employment and Wage Detail Report Submission Confirmation	
<ul style="list-style-type: none">• You have successfully submitted an Employment and Wage Detail file.• If you would like to make a payment for amounts due, select 'Make Payment' at the bottom of this page.	
<input type="button" value="Exit"/> <input type="button" value="Make Payment"/>	

- If you selected **Yes** in **Step 4**, the **File Format** page appears. Select **Delimited**, **ICESA**, or **EFW2** and click **Next**.

Third Party Administrator

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

Employment and Wage Detail Submission Process

File Format

- For details related to the most current file formats, select the appropriate link below.
- For details related to multiple file submissions or third party administrators (TPA) filings, click [here](#)

File Type	Record Length	File Extension
<input type="radio"/> Delimited (i.e., export from Excel with a comma delimiter)	Variable	.txt or .csv
<input type="radio"/> ICESA (NASWA Standard File Format)	275	.txt
<input type="radio"/> EFW2 (Formally MMREF-SSA)	512	.txt

- The **Select Wage Detail File** page appears. Click **Browse**. Navigate to and select the upload file. Click **Next** to process the file.

Third Party Administrator

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

Employment and Wage Detail Submission Process

Select Wage Detail File

Choose file by selecting the 'Browse' button. Once the file is selected, click 'Next'.

- The **Employment and Wage Detail Report Submission Confirmation** page appears. The submission process is complete. Either click **Exit**, or click **Make Payment** and see the section *Payment Information* for instructions.

Third Party Administrator

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

Employment and Wage Detail Report Submission Confirmation

- You have successfully submitted an Employment and Wage Detail file.
- If you would like to make a payment for amounts due, select 'Make Payment' at the bottom of this page.

NOTE: When you are filing for a quarter prior to 2010, the DOR wage detail file you upload will not be used to calculate the Quarterly contributions due for the Employer account.

VIEW SUBMISSION HISTORY

Introduction

This section describes how to view employment and wage detail submission history. You can view submission history by date range for original and adjusted wage detail reports. The data displayed includes the Submission Date and Time, Confirmation Number, Filing Method, and error information. You can also view the Employer Account Number and the summary of wage details specific to the submission, by clicking on the Details for each submission.

1. Click **Employment and Wage Detail Reporting**.
2. Click **View Submission History**.

The screenshot shows the 'Third Party Administrator' interface. 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' and 'Logout'. The main content area is titled 'Employment and Wage Detail Reporting' and contains several links: 'Submit Employment and Wage Detail File', 'Submit Employment and Wage Detail File for Quarters Prior to 2010', 'View Employer History', and 'View Submission History'. The 'View Submission History' link is circled in red. Below the links, there are descriptions for each, including details about submitting files and viewing submission history by date range.

3. The **Wage Detail Submission History Search** page appears. Enter a date range for the history to retrieve in the search. Click **Search**.

The screenshot shows the 'Wage Detail Submission History Search' page. It features a header 'Third Party Administrator' and fields for 'TPA ID' and 'TPA Name'. Below these is a section titled 'Wage Detail Submission History Search' with a date range input field: 'From: [] (mm/dd/yyyy) To: [] (mm/dd/yyyy)'. At the bottom, there are two buttons: 'Search' and 'Reset'.

- The Search Results display below the search grid. Click the **details** link for any submission to view details. Click the **errors** link to view error information.

Search Results							
Rows 1-10 of 15				◀ 1 2 ▶		Page 1 of 2	
Submission Date	Submission Time	Confirmation Number	Filing Method	Records	User ID	Employer Details	Record Errors
1/25/2011	12:05 AM	012411234906	File Upload	7	██████	details	errors
10/27/2010	9:02 PM	102710204652	File Upload	6	██████	details	errors
8/27/2010	11:49 AM		File Upload	6	██████		
8/27/2010	11:40 AM	082710113949	File Upload	6	██████	details	
7/29/2010	7:49 PM	072910194933	File Upload	1	██████	details	
7/29/2010	7:44 PM	072910194433	File Upload	4	██████	details	
7/28/2010	9:04 PM	072810210156	File Upload	10	██████	details	errors
4/29/2010	4:46 PM	042910164600	File Upload	3	██████	details	
4/21/2010	7:42 PM	042110193959	File Upload	5	██████	details	errors
2/16/2010	8:32 PM	021610202134	File Upload	1	██████	details	
Rows 1-10 of 15				◀ 1 2 ▶		Page 1 of 2	

- Details appear showing EAN, Employer Name, Year/Quarter, Submission Type, Confirmation Number, Number of Records, Total UI Gross Wages, and MA Wages Subject to Withholding.

Search Results							
Employer Account Number	Employer Name	Year/Quarter	Submission Type	Confirmation Number	Number of Records	Total UI Gross Wages	MA Wag Subject Withhold
██████	████████████████████	2010/4	Original	012411234906	3	\$30,599.99	\$29,957.19
██████	████████████████████	2010/4	Original	012411234906	210	\$528,277.92	\$528,277.22
██████	████████████████████	2010/4	Original	012411234906	1	\$12,692.28	\$12,692.93
██████	████████████████████	2010/4	Original	012411234906	2	\$20,382.32	\$19,192.42

- Errors are shown by Line Number, Error Message, and Error Type.

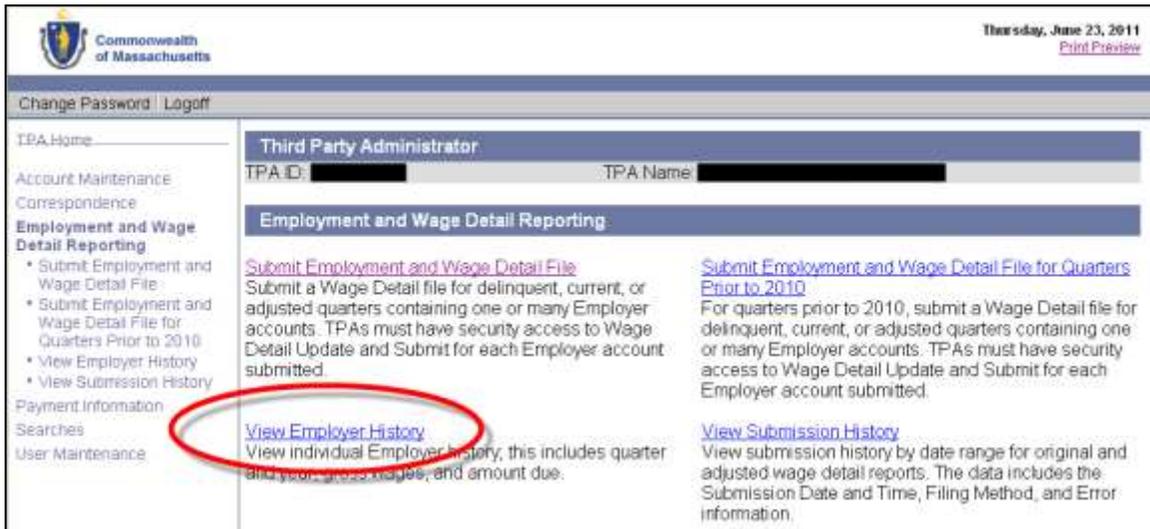
Search Results		
Rows 11-20 of 39		◀ 1 2 3 4 ▶
		Page 2 of 4
Line Number	Error Message	Error Type
348	Employer Account Number 00000000 is Invalid	Fatal Error
368	Employee Last Name VWXYZ, JR is Invalid	Non Fatal Error
849	TPA Not Authorized to submit for EAN	Fatal Error
402	Employee Last Name ABCDEFG, SR. is Invalid	Non Fatal Error
849	TPA Not Authorized to submit for EAN	Fatal Error
Rows 11-20 of 39		◀ 1 2 3 4 ▶
		Page 2 of 4

VIEW EMPLOYER HISTORY

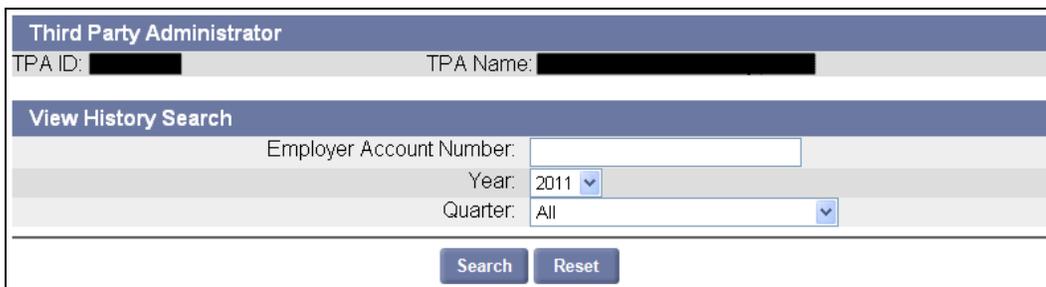
Introduction

This section describes how to view the summary of employment and wage detail history by Employer accounts. You can view the employment and wage detail summary for each assigned Employer account for a chosen quarter. The search results will include the Employer Account Number, Employer Name, Year/Quarter, Total UI Gross Wages, amounts due, and wages withheld.

1. Click **Employment and Wage Detail Reporting**.
2. Click **View Employer History**.



3. The **View History Search** page appears. Enter an Employer Account Number, and select a year and quarter. Click **Search**.



4. The Search Results display below the search grid.

Third Party Administrator							
TPA ID: [REDACTED]		TPA Name: [REDACTED]					
View History Search							
Employer Account Number: [REDACTED]							
Year: 2010							
Quarter: All							
<input type="button" value="Search"/> <input type="button" value="Reset"/>							
Search Results							
Employer Account Number	Employer Name	Year	Quarter	Total UI Gross Wages	Quarterly Amount Due	MA Wages Subject to Withholding	MA Income Tax Amount Withheld
[REDACTED]	[REDACTED]	2010	4	\$528,277.92	\$6,007.91	\$528,277.92	\$16,473.52
[REDACTED]	[REDACTED]	2010	3	\$456,005.69	\$6,921.24	\$456,005.69	\$14,343.18
[REDACTED]	[REDACTED]	2010	2	\$507,169.72	\$9,235.26	\$507,169.72	\$15,538.40
[REDACTED]	[REDACTED]	2010	1	\$445,703.00	\$8,334.66	\$445,704.12	\$12,613.59

Payment Information

ABOUT PAYMENT INFORMATION

Introduction

This section describes the functions that are available from the **Payment Information** area. From Payment Information, TPAs can:

- Review, modify, and **make payments** for multiple or individual Employer accounts
- Cancel payments
- Search payments
- Review Employer accounts
- Download payment due files
- View payment information for agent submissions and client groups

NOTE: In order to manage the Employer account **individually** and perform other payment related functions on behalf of the Employer, you must navigate into the Employer's account. Access the Employer's account via the **Search** function. See the section, *Searches - Employer Account Access* for instructions. In addition, consult the *UI Online Employer Self Service User Guide* for detailed instructions on performing Employer payment functions.

NOTE: Paper checks issued by TPAs will not be accepted by DUA.

IMPORTANT NOTE: Your TPA account must have the required roles before you can submit payments for each assigned Employer account. Coordinate with each Employer to get required roles assigned to you.

ABOUT DEFERRALS

Deferral eligibility will be given to private Contributory and non-profit 501(c)(3) Contributory Employers. The option to defer will be provided in the month of April for Quarter 1 filing and July for Quarter 2 filing.

The option to defer is provided for a quarter only after the current quarter has been filed timely. All deferrals become due by Quarter 3 due date (Oct. 31). All deferrals must be done manually from within an Employer account.

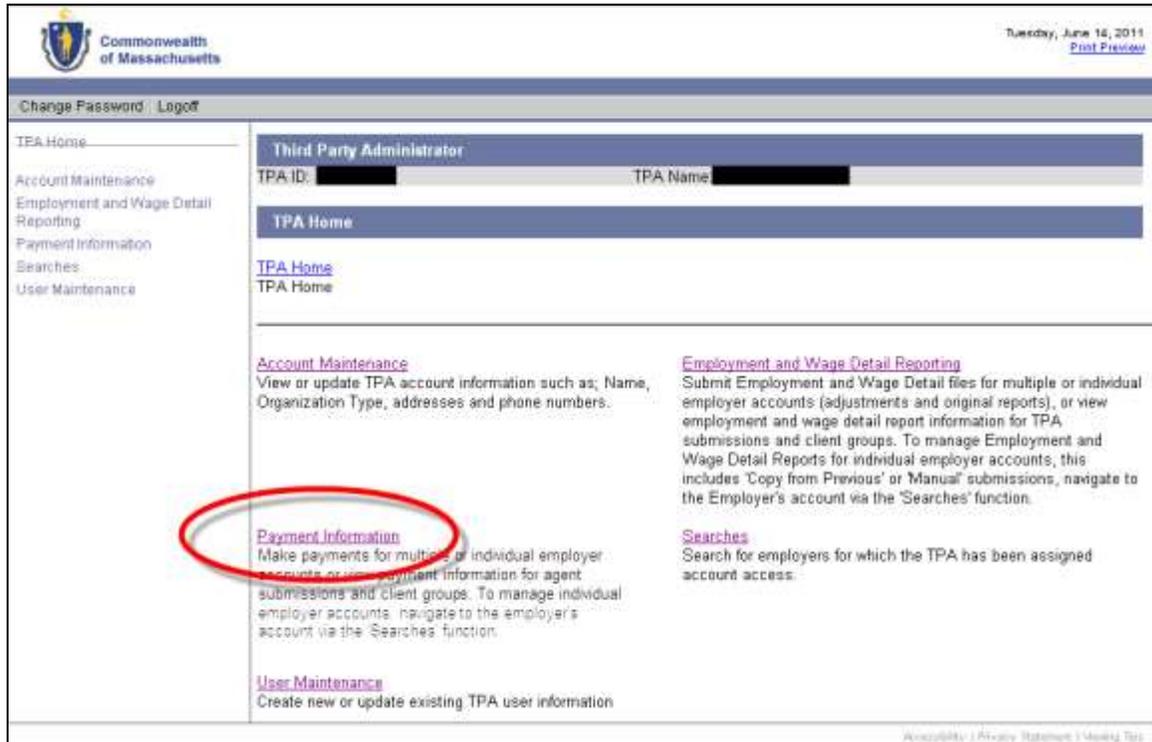
Please remember that deferral is not a requirement and that Employer Medical Assistance Contribution (EMAC) and Workforce Training Fund (WTF) contributions cannot be deferred.

IMPORTANT NOTE: Deferrals can only be performed for an assigned Employer when the TPA navigates into the individual Employer's Account Home and makes a deferred payment specifically on that Employer's behalf. **Deferrals cannot be performed as part of any bulk payment activities.** For more information see the UI Online Employer Self Service User Guide.

NAVIGATING TO PAYMENT INFORMATION

To navigate to the **Payment Information** page, perform the following steps:

1. Log in to UI Online. Click the **Payment Information** link in the left pane (the link also appears on the main pane of the TPA Home page).



2. The **Payment Information** page appears.



DOWNLOAD PAYMENT DUE FILE

Introduction

The **Payment Due** file lists all Employers assigned to the TPA account, and the corresponding amounts they each owe. This file is provided by DUA and is available using the **Download Payment Due File** function. Use this file to review Employer obligations, and to create a Payment File that can be uploaded as a payment statement when you make payments towards multiple Employer accounts at once. This section describes specifically how to:

- Download the **Payment Due** file via the UI Online system.
- Read the Payment Due **file format**.
- Edit the Payment Due file to create the Payment File to upload.
- **Upload** the Payment File.

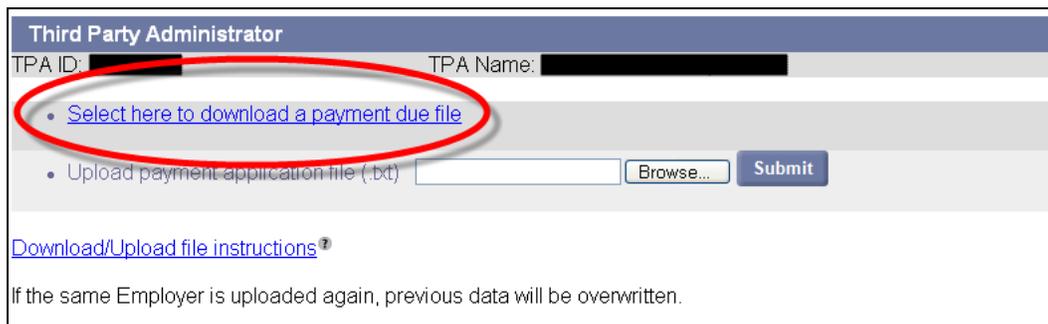
NOTE: For instructions on making a payment using an uploaded Payment File, see the section, *Paying – Making Payment Based on File Upload/Edits*.

Downloading the Payment Due File

1. Click **Payment Information**.
2. Click **Download Payment Due File**.



3. The following page appears. Click the link, **Select here to download a payment due file**.



4. The **File Download** pop-up window appears. Click **Save** and follow the prompts to download and save the file to your local folder.

Reading the Payment Due File Format

The file layout of the downloaded bulk payment file is as follows:

TPA ID, Download Date, Record Count, Total Amount Due, Current Quarter Due (*header row*)

Employer Account Number, Total Amount Due, Current Quarter Due, Employer Name (*Record 1*)

Employer Account Number, Total Amount Due, Current Quarter Due, Employer Name (*Record 2*)....and so on.

Sample File Downloaded:

```
000001,08302011,3,914.58,885.75
00000001,54.06,25.23,Employer Name 1
00000002,0.00,0,Employer Name 2
00000003,860.52,860.52,Employer Name 3
```

Editing the Payment Due File to Use as the Payment File

Edit the **Payment Due** file so it can be used as a **Payment File**, using these steps:

1. Use the file you downloaded using the steps in the section, *Downloading the Payment Due File*.
2. Open the file and update the second value (Total Amount Due) for each record with the correct payment amount to be applied to the Employer account associated. Change the value to 0 for Employers for whom no payment is being included.
3. Save the file to your local computer.

NOTE: Only 1,000 records in an upload file will be reported with your payment. If there are over 1,000 Employers in your download file, you should divide the records between multiple upload files, each having 1,000 or fewer records. Be sure to customize the header row in each file to reflect its actual record count and its sum of Total Payment Amount fields.

You may also consider applying to DUA to pay via ACH Credit.

NOTE: You cannot have a negative payment amount in the Payment File.

NOTE: The upload file will not be saved by the system. Data will be uploaded, and it can be reviewed online after successful upload.

Sample File Edited:

```
000001,08302011,3,700.52,885.75
00000001,0,25.23,Employer Name 1
00000002,0.00,0,Employer Name 2
00000003,700.52,860.52,Employer Name 3
```

Uploading the Payment File

1. Navigate to the **Download Payment Due File** area.
2. The following page appears. Click **Browse** near the **Upload payment application file** field.

The screenshot shows a web interface for a Third Party Administrator. At the top, there is a header 'Third Party Administrator' and fields for 'TPA ID' and 'TPA Name'. Below this, there are two bullet points: 'Select here to download a payment due file' and 'Upload payment application file (.txt)'. The 'Upload payment application file (.txt)' section includes a text input field, a 'Browse...' button (circled in red), and a 'Submit' button. Below the input field, there is a link 'Download/Upload file instructions' and a note: 'If the same Employer is uploaded again, previous data will be overwritten.'

3. Navigate to and select the Payment file in your local folder.
4. When the file path and name appear in the field to the left of the Browse button, click **Submit**.

NOTE: The file will be processed with errors being displayed on the same page or on a separate page. Errors on the same page prevent the file from being processed. Errors on the **Rejected File Transactions** page can be ignored and the remaining records can be processed, or the file can be fixed for the errors listed and reloaded to the system. Printing the page(s) of errors is recommended.

5. The **Upload Complete** page appears. Click **Confirm Payment**.

The screenshot shows the 'Upload Complete' page. It features a header 'Third Party Administrator' and fields for 'TPA ID' and 'TPA Name'. Below this, there is a section titled 'Upload Complete' with the following data: 'Successful Records: 3', 'Payment Amount: \$6,900.00', 'Rejected Records: 0', 'File Size: 144 bytes', 'Upload Date: 6/23/2011', and 'Upload Time: 4:28:21 PM EST'. At the bottom of the page, there is a 'Confirm Payment' button.

NOTE: When you click **Confirm Payment** the data is uploaded but the payment is not processed. To complete the payment, perform the steps in the section, *Paying -- Making Payment Based on File Upload/Edits*.

PAYMENT OPTIONS

Introduction

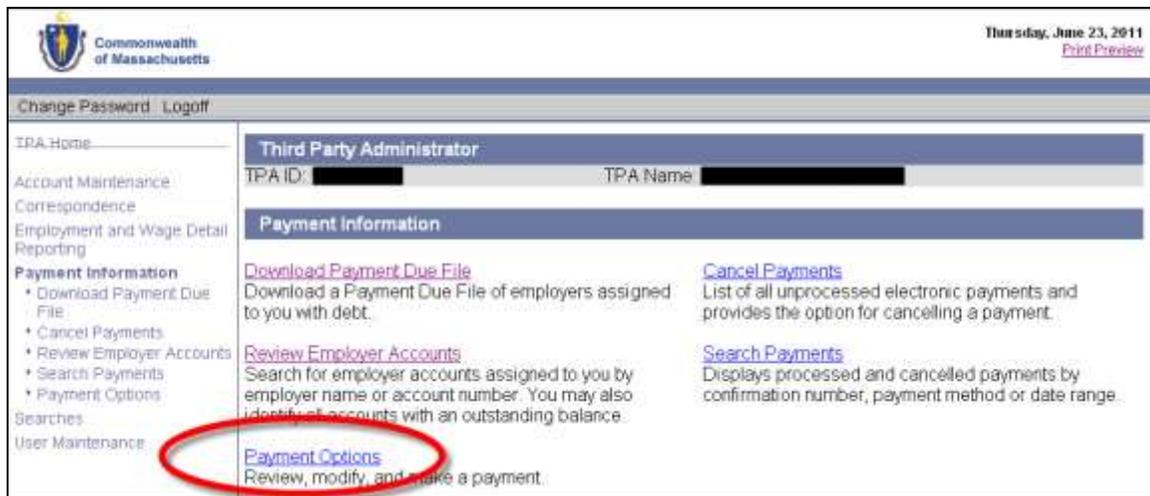
This section describes the options TPAs have when making payments on behalf of their assigned Employer accounts. Options include:

- **Making full payment for all assigned Employers**
Pay all debt for all Employers in full without downloading/uploading a file or editing the system-calculated amounts. Only payment via ACH Debit is allowed.
- **Manually entering payment information online per Employer**
View the list of all Employers and edit their payment amounts manually. Only payment via ACH Debit is allowed.
- **Making Payment based on file upload/edits**
Using the Payment Due file downloaded in the previous section, upload the edited data to make a payment. Only payment via ACH Debit is allowed.
- **Acting as a single Employer**
Navigate into the Employer area, and process an individual Employer payment. Only payment via ACH Debit is allowed if the TPA issues the payment. Paper checks are only accepted **if the check is issued by the Employer**.
- **Paying via ACH Credit**
ACH Credit payments are made separately from the UI Online software. TPAs must apply with DUA to use ACH Credit. See the section, *Applying to DUA to Make Payments Using ACH Credit*.

Navigating to the Payment Options Page

Perform these steps to navigate to the **Payment Options** page.

1. Click **Payment Information**.
2. Click **Payment Options**.



3. The **Payment Options** page appears, with links for all applicable payment options. The page also displays links to edit or delete any previously entered payment details that are in progress (if any).

Example 1: Payment Options page when no file has been uploaded, and no information has been saved. The only options are for paying in full, or entering payment information per Employer.

The screenshot shows the 'Third Party Administrator' header with TPA ID and TPA Name fields. Below is the 'Payment Options' section with two links: 'Make full payment for all assigned employers for all debt \$61,000.00' and 'View all employers and enter payment information online per employer (including current quarter)'.

Example 2: Payment Options page when a Payment File has been uploaded in preparation for making a payment.

The screenshot shows the 'Third Party Administrator' header with TPA ID and TPA Name fields. Below is the 'Payment Options' section with four links: 'Make full payment for all assigned employers for all debt \$61,000.00', 'Make payment based on file uploads/edits \$9,000.00; 3 employers', 'Edit previously saved information', and 'Delete previously saved information'. Below this is the 'Recent Payment Application File Submission History' table.

Date	Submission Medium	Status
7/18/2011	File Upload	New

Paying -- Making Full Payment for All Assigned Employers

Use this method to make the full payment due on all your assigned Employer accounts. You will not be able to make any changes to the payment amounts or remove any of the Employer accounts.

1. Click **Payment Information**.
2. Click **Payment Options**.
3. Click **Make full payment for all assigned employers for all debt**.

The screenshot shows the 'Third Party Administrator' header with TPA ID and TPA Name fields. Below is the 'Payment Options' section with two links: 'Make full payment for all assigned employers for all debt \$9000' (circled in red) and 'View all employers and enter payment information online per employer (including current quarter)'.

4. Continue with **Step 5** of the section, *Paying -- Manually Entering Payment Information Online Per Employer*, to complete this procedure.

Paying -- Manually Entering Payment Information Online Per Employer

1. Click **Payment Information**.
2. Click **Payment Options**.
3. Click **View all employers and enter payment information online per employer**.

Third Party Administrator

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

Payment Options

- [Make full payment for all assigned employers for all debt \\$61,000.00](#)
- [View all employers and enter payment information online per employer \(including current quarter\)](#)

4. The **Search Employers** page appears, listing up to 100 Employer accounts associated with your TPA account, and their payments due.

Third Party Administrator

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

Search Employers

Employer Name:

Employer Account Number:

Employer Account Status:

Display Accounts With Amount Due Only:

Display Accounts With Payment Amount Errors (overpaid):

Download Payment Due File to see all employers

Edit Assigned Employer Accounts

First 100 records are shown. To edit specific employers, search above.

Employer Name	Employer Account Number	Employer Current Quarter/Month Amount Due	Employer Total Amount Due	Employer Debt Amount	Payment Amount
[REDACTED]	[REDACTED]	\$0.00	\$8,000.00	\$8,000.00	\$0.00
[REDACTED]	[REDACTED]	\$16,468.57	\$35,000.00	\$35,000.00	\$16,468.57
[REDACTED]	[REDACTED]	\$0.00	\$18,000.00	\$18,000.00	\$0.00
[REDACTED]	[REDACTED]	\$0.00	(\$6,090.35)	\$0.00	\$0.00

Out of 4 Employers assigned to you a payment submitted now would total \$0.00 for 0 employers.

[Enter Current Quarter/Month Amount Due for all Employers](#)
[Enter Total Amount Due for all Employers](#)
[Clear All Employer Payment Amounts](#)

Select "Previous" to return to payment options.
 Select "Save" to update the total payment amount above and per Employer.
 Select "Submit" to continue with payment submission.

- Enter all the Payment Amounts in the **Edit Assigned Employer Accounts** area.
- Use the links on the page to enter or clear all Employer Payment Amounts if desired.
- Click **Save** frequently if you are entering custom Payment Amounts for each Employer.
- Click **Submit** when all information is complete.

NOTE: Only 100 Employers are displayed on the screen with paging to move through them. To display other Employers, or a specific Employer, enter criteria in the search grid and click **Search**.

NOTE: Payments made for UI, EMAC, and WTF are held by law in separate fiduciary accounts. Credits are reviewed, approved, and remitted strictly separately as well. Do not underpay UI, EMAC, or WTF obligations on the assumption that a possible credit for one obligation will offset the underpayment of another.

5. The **Payment Method** page appears, displaying information about the payment you are about to make. Click **Next**.

Third Party Administrator

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

1 → 2 → 3 → COMPLETE

Review Balance **Select Payment Method** Submit Payment Details

Payment Method

Contributory Employer Due Dates: **Quarter 1 - April 30**
Quarter 2 - July 31
Quarter 3 - October 31
Quarter 4 - January 31

Reimbursable Employer Due Dates: **30 calendar days from the mailing of the bill**

If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Debt Amount Due: **\$26,000.00**
Payment Amount: **\$26,000.00**
Payment Method: ACH Debit *

If you intend to submit payment by the ACH Credit method of payment, please [select here](#) before you proceed.

NOTE: The only payment method available on this page is ACH Debit. For information on paying using ACH Credit, click on the link at the bottom of the page.

- The **ACH Payment** page appears. Enter the **Routing Transit Number** and **Bank Account Number**, select the **Account Type**, and enter the **Payment Effective Date**. Click **Next**.

Third Party Administrator

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

1 →
 2 →
 3 → COMPLETE

Review
Balance

Select
Payment
Method

Submit
Payment
Details

ACH Payment

	Quarter 1 - April 30
	Quarter 2 - July 31
Contributory Employer Due Dates:	Quarter 3 - October 31
	Quarter 4 - January 31
Reimbursable Employer Due Dates:	30 calendar days from the mailing of the bill
If payment is not submitted by the date indicated, you may be subject to interest or penalties.	
Debt Amount Due:	\$26,000.00
Payment Amount:	\$26,000.00
Routing Transit Number:	<input style="width: 100%;" type="text" value=""/>
Bank Account Number:	<input style="width: 100%;" type="text" value=""/>
Account Type:	Checking *
Payment Effective Date:	7/18/2011

Your [Routing Transit Number](#) and [Bank Account Number](#) are located on the paper checks provided by your bank.

Previous
Next

IMPORTANT NOTE: The Routing Transit Number and the Bank Account Number are NOT retained in the UI Online system, as a security measure. Enter the numbers each time you submit a payment.

- The **Payment Verification** page appears. Click **Submit** to complete the payment.

Third Party Administrator

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

1 →
 2 →
 3 → COMPLETE

Review
Balance

Select
Payment
Method

Submit
Payment
Details

Payment Verification

	Quarter 1 - April 30
	Quarter 2 - July 31
Contributory Employer Due Dates:	Quarter 3 - October 31
	Quarter 4 - January 31
Reimbursable Employer Due Dates:	30 calendar days from the mailing of the bill
If payment is not submitted by the date indicated, you may be subject to interest or penalties.	
Total Payment Amount:	\$26,000.00
Routing Transit Number:	[REDACTED]
Bank Account Number:	[REDACTED]
Account Type:	Checking
Payment Effective Date:	7/18/2011

By paying your Division of Unemployment Assistance bill by way of this online service, you are authorizing Division of Unemployment Assistance to charge your checking account for the amount you submitted.

Previous
Cancel
Submit

8. The **Payment Confirmation** page appears, displaying the confirmation number for the payment.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
1 → 2 → 3 → COMPLETE Review Balance Select Payment Method Submit Payment Details	
Payment Confirmation	
Agent Name: [REDACTED]	Agent Account Number: [REDACTED]
Effective Date: 7/18/2011	Payment Confirmation #: [REDACTED]
Transaction Date: 7/18/2011	Payment Method: ACH Debit
Transaction Time: 3:21 PM	
Remaining Balance: \$0.00	Total Payment Amount: \$26,000.00
If you have a remaining balance you may make another payment by selecting "Make Payment"	

Paying -- Making Payment Based on File Upload/Edits

TPAs have the option of downloading a Payment Due file from DUA that they can edit (if applicable) and then upload as their payment report when making payments. See the section, *Downloading Payments Due File*, for instructions on:

- Downloading the **Payment Due** file via the UI Online system.
- Reading the Payment Due file format.
- Editing the Payment Due file to create the Payment File to upload.
- Uploading the Payment File

Once you upload the file, you have the option of:

- Making a payment based on data that was uploaded from the Payment File.
- Editing the uploaded data before making the payment.
- Deleting uploaded data ('deleting the previously saved information')

Then continue with the instructions that follow to actually make the payment using the upload file.

Making a payment based on uploaded data

1. Click the **Make payment based on file uploads/edits** link.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Payment Options

- [Make full payment for all assigned employers for all debt \\$61,000.00](#)
- [Make payment based on file uploads/edits \\$9,000.00; 3 employers](#)
- [Edit previously saved information](#)
- [Delete previously saved information](#)

Recent Payment Application File Submission History

Date	Submission Medium	Status
7/18/2011	File Upload	New

2. Continue with **Step 5** of the section, *Paying -- Manually Entering Payment Information Online Per Employer*, to complete this procedure.

Editing the Uploaded Data Before Making the Payment

1. Click the **Edit previously saved information** link.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Payment Options

- [Make full payment for all assigned employers for all debt \\$61,000.00](#)
- [Make payment based on file uploads/edits \\$9,000.00; 3 employers](#)
- [Edit previously saved information](#)
- [Delete previously saved information](#)

Recent Payment Application File Submission History

Date	Submission Medium	Status
7/18/2011	File Upload	New

2. Continue with **Step 4** of the section, *Paying -- Manually Entering Payment Information Online Per Employer*, to complete this procedure.

Deleting Previously Saved Information

1. Click the **Delete previously saved information** link.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

Payment Options

- [Make full payment for all assigned employers for all debt](#) \$61,000.00
- [Make payment based on file uploads/edits](#) \$9,000.00; 3 employers
- [Edit previously saved information](#)
- [Delete previously saved information](#)

Recent Payment Application File Submission History

Date	Submission Medium	Status
7/18/2011	File Upload	New

2. A **Warning** page appears. Click **Delete** to continue.

Third Party Administrator
TPA ID: [REDACTED] TPA Name: [REDACTED]

WARNING:

You are about to delete all unsubmitted payment detail uploads and edits previously saved.

Select 'Cancel' to abort this deletion.
Select 'Delete' to proceed with deletion.

3. A **Confirmation** page appears, indicating that information has been deleted.

NOTE: Once uploaded data has been deleted, only two links are available from the Payment Options page (see Example 1 in *Navigating to the Payment Options Page.*)

Paying – Acting as a Single Employer

This section briefly describes how to navigate into the Employer account and make a payment for the Employer. More detailed instructions on making the payment are available in the *UI Online Employer Self Service User Guide*.

1. Click **TPA Home**.
2. Click **Searches**.
3. Click **Employer Searches**.

- The **Employer Search** page appears. Enter search criteria for the Employer in the Employer Name, Employer Account Number, and/or FEIN fields. Select a **Role**. Click **Search**.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Employer Search	
Employer Name:	<input type="text"/>
Employer Account Number:	<input type="text"/>
FEIN:	<input type="text"/>
Role:	All <input type="button" value="v"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>	

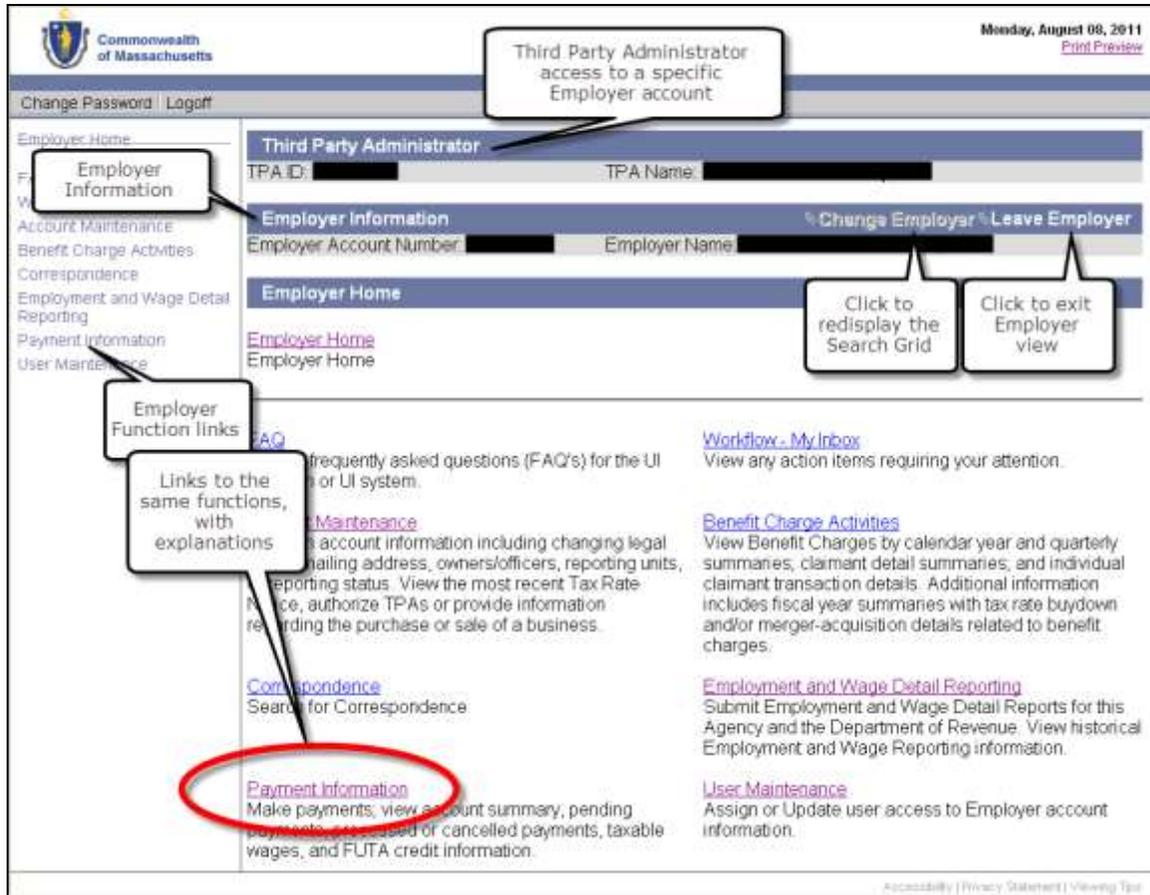
- The **Search Results** appear below the search grid on the Employer Search page. Click the **Employer Name** link corresponding to the **Payments Update and Submit** Role.

Search Results					
Employer Name	FEIN	EAN	Role	Services Begin Date	Services End Date
Employer XYZ	[REDACTED]	[REDACTED]	Account Maintenance Update and Submit	8/18/2010	
Employer XYZ	[REDACTED]	[REDACTED]	Payments Update and Submit	8/18/2010	
Employer XYZ	[REDACTED]	[REDACTED]	Employment and Wage Detail Update and Submit	8/18/2010	

Select Link for [Role Definitions](#) [Download Employer Details](#)

NOTE: If the TPA is authorized to perform multiple roles for the Employer, the Search Results will list the same Employer once for each role assignment. Click the **Employer Name** link corresponding to the Payments Update and Submit Role.

- The TPA view of the **Employer Home** page appears. From this page you can perform functions on the Employer account, much as the Employer can. Click **Payment Information**.



7. Click **Payment Account Summary**, and click **Make Payment**. For detailed instructions, see the *UI Online Employer Self Service User Guide*.
8. Click **Leave Employer** to exit the Employer account when finished.

Applying to DUA to Make Payments Using ACH Credit

If you wish to use the ACH Credit method of payment, follow the instructions below to access the application.

1. Navigate to www.mass.gov/uima.
2. Click the **Forms** link under the **Our Organization** area, and click **ACH Credit**.
3. Fill out and submit the application according to the instructions.

NOTE: A sample form also appears in the Addendum to this document.

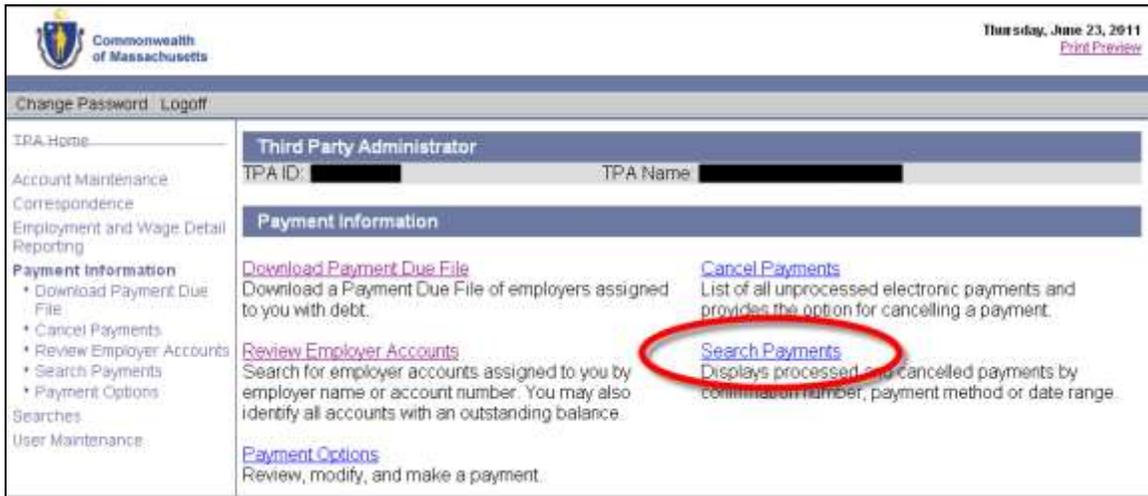
SEARCH PAYMENTS

Introduction

This section describes how to search for payments and view payment status. Processed and cancelled payments can be viewed by confirmation number, payment method, or date range.

Searching for Payments

1. Click **Payment Information**.
2. Click **Search Payments**.



3. The **Search Payments** page appears. Enter search criteria and click **Search**.

The screenshot shows the 'Search Payments' form. The 'Third Party Administrator' header is at the top. Below it are fields for 'TPA ID' and 'TPA Name'. The 'Search Payments' section contains the following fields: 'Confirmation Number' (text input), 'Method' (dropdown menu), 'Min \$' (text input), 'Max \$' (text input), 'Status' (dropdown menu), and 'Transaction Date: From' and 'To' (text inputs with date format '(mm/dd/yyyy)'). At the bottom are 'Search' and 'Reset' buttons.

4. The **Search Results** appear below the search grid on the **Search Payments** page. Click the **Confirmation Number** link to view payment details.

Search Results					
Confirmation Number	Deposit Number	Transaction Date	Method	Status	Amount
101053667		7/18/2011	ACH Debit	Submitted	\$9,000.00
100957390		6/23/2011	ACH Debit	Submitted	\$6,900.00

- The **Payment Detail** page appears. Click on an **Employer Account Number** to view additional payment details from within the Employer Account.

Third Party Administrator		
TPA ID:	██████████	TPA Name: ██████████
Payment Detail		
Confirmation Number:	██████████	Transaction Date: 6/23/2011
Payer ID:	██████████	Payer Type: Agent
Payment Method: ACH Debit		Status: Submitted
Payment Amount: \$6,900.00		Items in Payment: 2
Search Employer Payments		
EAN:	<input type="text"/>	Name: <input type="text"/> Amount: <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>		
Employer Payment Items		
Employer Account Number	Employer Name	Amount
00000000	██████████	\$6,000.00
00000001	██████████	\$10,900.00
<input type="button" value="Previous"/>		

- The **Payment Detail** page of the Employer account displays.

Third Party Administrator						
TPA ID:	██████████	TPA Name:	██████████			
Employer Information				Change Employer Leave Employer		
Employer Account Number:	██████████	Employer Name:	██████████			
Payment Detail						
Confirmation Number	Receipt Date	Posting Date	Method	Description	Amount	
██████████	11/20/2009		ACH Debit	Account ██████████ Paid by Agent	\$100.00	
<input type="button" value="Transfer"/>						
Payment Distribution						
Debt Posting Date	Sub-Account	Quarter / Year	Amount Applied			
7/31/2009	UI Contributions Principal	3/2009	\$100.00			
		Total	\$100.00			
<input type="button" value="Previous"/>						

REVIEW EMPLOYER ACCOUNTS/PAYMENT ACCOUNT SUMMARY

Introduction

This section describes how to search for and review the Payment Account Summary of a specific Employer account.

NOTE: For more information on the Employer Payment Account Summary, see the *UI Online Employer Self Service User Guide*.

1. Click **Payment Information**.
2. Click **Review Employer Accounts**.



3. The **Search Employers** page appears. Enter search criteria or leave blank to return all values, and click **Search**.
4. The search results display below the search grid, in the **Review Assigned Employer Accounts** area. The results display the Employer, EAN, Current Amount Due, Total Amount Due, and Status. Click the **Employer Name** to view additional details on the payments due.



- The **Account Summary** page for the specific Employer appears.

NOTE: By default, the **current** Statement Period displays on the Payment Account Summary page. Keep this Statement Period to display information about the most recently completed transactions. (The outstanding balance that comes due in the current Statement Period is incurred up to the end of the previous Statement period.)

NOTE: For more information on the **Payment Account Summary**, see the *UI Online Employer Self Service User Guide*. (Note that the TPA's view of the Employer's Payment Account Summary does not include the Quarterly Summary, or the Interest Rate Calculator.)

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Employer Information Change Employer Leave Employer	
Employer Account Number: [REDACTED]	Employer Name: [REDACTED]
Statement Period: <input type="text" value="July, August, September (Q3)"/> <input type="text" value="2011"/>	
<input type="button" value="Search"/>	
Account Summary Statement Period: July, August, September (Q3) 2011	
<ul style="list-style-type: none"> The statement below contains the transactions posted to your Unemployment Insurance Account during the identified months. Payments are applied according to the Payment hierarchy. Prior quarter debt is carried forward to the current quarter/month. Payments made are applied to the current quarter/month amount due first. To review quarterly charges, view Quarterly Summary. To review outstanding amounts due, view Unpaid Debt. To Preview future interest charges, view Interest Calculator. 	
Item	Amount
All Financial Transactions	NA
Outstanding Balance	\$10.24
Payments Received	(\$60.24)
UI Contributions	\$1,345.89
Other Charges	\$0.00
UHI Contributions	\$276.93
Interest	\$12.73
Penalties	\$0.00
Amount Due	\$1,585.55
Debt Amount Due	\$1,585.55
Potential Credit Amount	\$0.00
<p>Credits will be applied to future amounts due. Deferral option will be available starting April 1 to April 30 for Quarter 1 and starting July 1 to July 31 for Quarter 2. Payments submitted after 3 p.m. may be considered received the next business date.</p>	
<input type="button" value="Previous"/>	

- Click **Leave Employer** to exit the Employer's account. Click **Change Employer** to bring up the search grid again, where you can enter different criteria for a new search.

User Maintenance

ABOUT USER MAINTENANCE

Introduction

This section describes how **TPA System Administrators** can manage user access to the TPA account. The person who completes the TPA Registration is assigned the TPA System Administrator role by default. This user receives login credentials to access the UI Online self – service account during the registration.

The system administrator can in turn create accounts for other users and assign roles to those users. Role assignments dictate which functions users can perform.

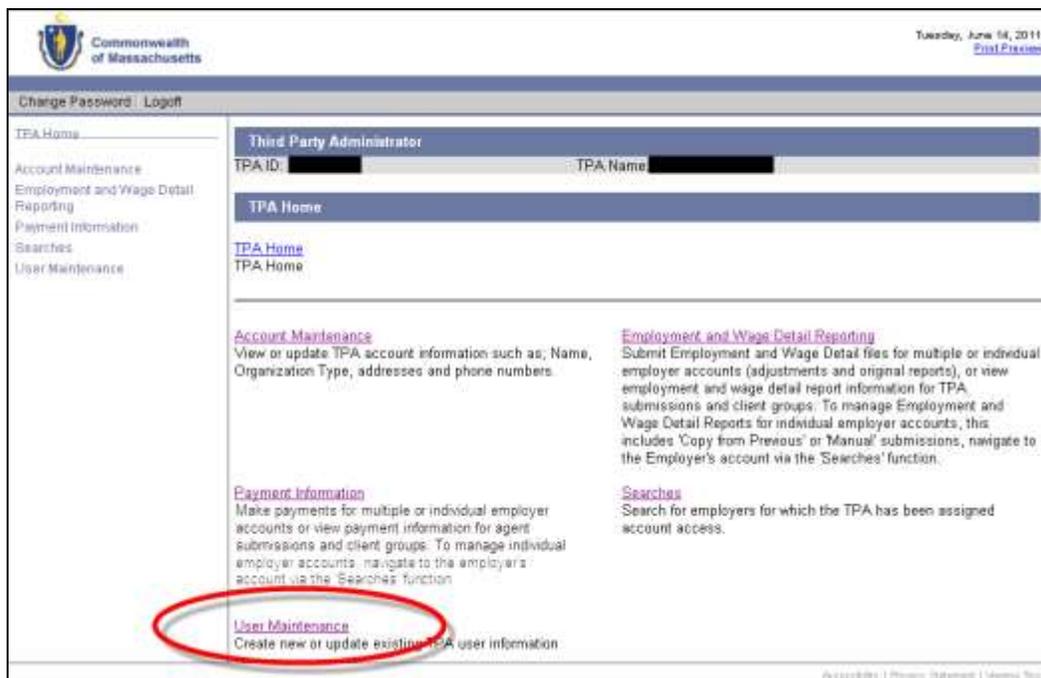
The administrative activities that are described in this section include:

- Creating a new user
- Searching for user details
- Modifying user information
- Assigning user roles
- Resetting user passwords
- Inactivating Reinstating a user account
- a user account
- Assign Employers and Roles

NAVIGATING TO USER MAINTENANCE

To navigate to **User Maintenance**, perform the following steps:

1. Log in to UI Online. Click the **User Maintenance** link in the left pane (the link also appears on the main pane of the Employer Home page).



2. The **User Maintenance** page appears.

CREATING A NEW USER

1. Click **User Maintenance**.
2. Click **Third Party Administrator Roles**.

The screenshot shows the 'Third Party Administrator' header with 'TPA ID' and 'TPA Name' fields. Below is the 'User Maintenance' section. A link for 'Third Party Administrator Roles' is circled in red. Below this link is the text: 'Assign or update user access to TPA accounting information.'

3. The **User Search Criteria** page appears. Click **New**.

The screenshot shows the 'User Search Criteria' section with various input fields: 'User ID', 'Last Name', 'First Name', 'Location' (dropdown), 'Contractor' (checkboxes for 'Non-contract' and 'Contract'), 'Inactivated Users' (checkboxes for 'Active' and 'Inactive'), and 'Roles' (dropdown). At the bottom are 'Search', 'Reset', and 'New' buttons. A callout box points to the 'New' button with the text: 'Click New to create a new user'.

4. The **User Details** page appears. Enter information about the user. Fields with an asterisk are required. Click **Save**.

The screenshot shows the 'User Details' section with the following fields: 'First Name', 'Middle Initial', 'Last Name', 'Telephone' (with an 'ext' field), 'eMail', 'Employee ID', and '4-digit PIN Code'. Each of these fields has a red asterisk to its right, indicating they are required. Below these fields are 'Effective Start Date' and 'Effective End Date' fields with date format instructions: '(mm/dd/yyyy)'. At the bottom is a 'New Comments' text area and 'Save' and 'Cancel' buttons.

IMPORTANT NOTE: By default, the user who registers the TPA account is assigned an Employee ID that is identical to the TPA ID. **All other users must be assigned an Employee ID by the user who creates their account.** (An Employee ID is needed by any user for them to use the Forgotten Password feature.)

5. The **Password Link Sent** page appears. Click **Next** to return to the **User Search Criteria** page.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
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.	
You must now assign roles for the user just created. In order to assign role(s), select 'Next', search for the User by name or User ID. Select the user, then select 'Roles'.	
Note: This password link will only be effective for the next 96 hours .	
<input type="button" value="Next"/>	

NOTE: When you create a new user, the system generates an email message to that user. The message contains a link. When the user clicks the link, a browser launches with a special login page. The user enters a Password of their choosing, selects a security question, answers the security question, and sets a PIN from this page.

6. Before the user can access any functions in UI Online, you must assign them roles. See the section, *Assigning User Roles*.

SEARCHING FOR USER DETAILS

1. Click **User Maintenance**.
2. Click **Third Party Administrator Roles**.

Third Party Administrator
 TPA ID: [REDACTED] TPA Name: [REDACTED]

User Maintenance
[Third Party Administrator Roles](#)
 Assign or update user access to TPA accounting information.

3. The **User Search Criteria** page appears. Enter search criteria (or leave blank to return all users) and click **Search**.

Third Party Administrator
 TPA ID: [REDACTED] TPA Name: [REDACTED]

User Search Criteria

User ID:
 Last Name:
 First Name:
 Location: Any
 Contractor: Non-contractor Contractor*
 Inactivated Users: Active Inactive*
 Roles: Any

4. The search results display below the search grid. Click a **User ID** to display user details.

Third Party Administrator
 TPA ID: [REDACTED] TPA Name: [REDACTED]

User Search Criteria

User ID:
 Last Name:
 First Name:
 Location: Any
 Contractor: Non-contractor Contractor*
 Inactivated Users: Active Inactive*
 Roles: Any

User Search Results

User ID	Last Name	First Name	Eff. Start	Eff. End
userabc	abc	user	8/5/5011	
userxyz	xyz	user	8/1/2011	

5. The **User Details** page appears.

Third Party Administrator		Change Agent	Leave Agent
TPA ID:	[REDACTED]	TPA Name:	[REDACTED]
User Details			
User Type:	Agent		
User ID:	[REDACTED]		
First Name:	[REDACTED]		
Middle Initial:	[REDACTED]		
Last Name:	[REDACTED]		
Telephone:	[REDACTED]		
eMail:	[REDACTED]		
Employee ID †	[REDACTED]		
PIN Code †	[REDACTED]		
Department Code:	Select one		
Effective Start Date:	1/26/2010		
Effective End Date:	[REDACTED]		
Last Logged On:	7/27/2016		
Incorrect Password Attempts:	0		
Account Status:	Active		
Security Question:	What was the name of your first pet?		
Security Answer:	[REDACTED]		
Comments:	[REDACTED]		
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.		
Employer Roles	View/Edit the roles that this user is assigned to for an employer.		
Previous			

MODIFYING USER INFORMATION

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Modify**.

Third Party Administrator Change Agent | Leave Agent

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

User Details

User Type: **Agent**

User ID: [REDACTED]

First Name: [REDACTED]

Middle Initial: [REDACTED]

Last Name: [REDACTED]

Telephone: [REDACTED]

eMail: [REDACTED]

Employee ID: [REDACTED]

PIN Code: [REDACTED]

Department Code: **Select one**

Effective Start Date: **1/26/2010**

Effective End Date: [REDACTED]

Last Logged On: **7/27/2016**

Incorrect Password Attempts: **0**

Account Status: **Active**

Security Question: **What was the name of your first pet?**

Security Answer: [REDACTED]

Comments: [REDACTED]

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.

Employer Roles View/Edit the roles that this user is assigned to for an employer.

[Previous](#)

3. An editable version of the **User Details** page appears. Add or edit information and click **Save**.

Third Party Administrator

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

User Details

User Type: **Agent**

User ID: [REDACTED]

First Name: [REDACTED] *

Middle Initial: [REDACTED]

Last Name: [REDACTED] *

Telephone: [REDACTED] ext: [REDACTED]

eMail: [REDACTED] *

Employee ID: [REDACTED] *

4-digit PIN Code: [REDACTED] *

Effective Start Date: **8/1/2011**

Effective End Date: [REDACTED] (mm/dd/yyyy)

Last Logged On: **8/8/2011**

Incorrect Password Attempts: **0**

Account Status: **Active**

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

Security Answer: [REDACTED]

Previous Comments

[REDACTED]

New Comments

[REDACTED]

[Save](#) [Cancel](#)

ASSIGNING USER ROLES

Introduction

The specific functions a user can perform are dictated by the user's role assignments.

Roles include:

- TPA System Administrator – Users assigned this role can:
 - use all functions in the TPA system, including User Maintenance;
 - use any function in an assigned Employer's account for which the Employer has assigned the appropriate role to the TPA.
- TPA User – Users assigned this role can:
 - use all functions in the TPA system, except User Maintenance;
 - use any function in an assigned Employer's account for which the Employer has assigned the appropriate role to the TPA.

To assign or change role assignments, follow these steps.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Roles**.

Third Party Administrator Change Agent | Leave Agent

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

User Details

User Type: **Agent**

User ID: [REDACTED]

First Name: [REDACTED]

Middle Initial: [REDACTED]

Last Name: [REDACTED]

Telephone: [REDACTED]

eMail: [REDACTED]

Employee ID*: [REDACTED]

PIN Code*: [REDACTED]

Department Code: **Select one**

Effective Start Date: **1/26/2010**

Effective End Date: [REDACTED]

Last Logged On: **7/27/2016**

Incorrect Password Attempts: **0**

Account Status: **Active**

Security Question: **What was the name of your first pet?**

Security Answer: [REDACTED]

Comments: [REDACTED]

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.
Employer Roles	View/Edit the roles that this user is assigned to for an employer.

[Previous](#)

- The **Assign Roles** page appears. Check roles in the **Current Roles Assigned to User** area to flag them for removal. Check roles in the **Available Roles** area to flag them for assignment. Click **Save**.

The screenshot shows a web interface for assigning roles to a user. It is divided into several sections:

- Third Party Administrator**: Fields for TPA ID and TPA Name, both redacted with black boxes.
- Assign Roles To User**: Fields for User Type (Agent), User ID, and Name, with User ID and Name redacted.
- Current Roles Assigned to User**: A section with a **Remove** header. It contains one role: **TPA User** with the description "User". A callout box points to the checkbox next to this role, stating: "Check box and click Save to remove role".
- Available Roles**: A section with an **Add** header. It contains one role: **TPA System Administrator** with the description "TPA System Administrator". A callout box points to the checkbox next to this role, stating: "Check box and click Save to assign role".

At the bottom right of the form are two buttons: **Save** and **Cancel**.

RESETTING USER PASSWORDS

NOTE: When you perform a password reset for a user, an email message is automatically sent to that user. The message contains a link; when the user clicks the link, a browser is launched in which the user can reset their own password.

Follow these steps to begin the reset password process.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Reset Password**.

Third Party Administrator Change Agent Leave Agent

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

User Details

User Type: **Agent**
 User ID: [REDACTED]
 First Name: [REDACTED]
 Middle Initial: [REDACTED]
 Last Name: [REDACTED]
 Telephone: [REDACTED]
 eMail: [REDACTED]
 Employee ID*: [REDACTED]
 PIN Code*: [REDACTED]
 Department Code: **Select one**
 Effective Start Date: **1/26/2010**
 Effective End Date: [REDACTED]
 Last Logged On: **7/27/2016**
 Incorrect Password Attempts: **0**
 Account Status: **Active**
 Security Question: **What was the name of your first pet?**
 Security Answer: [REDACTED]
 Comments: [REDACTED]

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.
Employer Roles	View/Edit the roles that this user is assigned to for an employer.

[Previous](#)

3. The **Reset Password** page appears, requesting confirmation that you wish to reset the password. Click **Confirm** to continue.

Third Party Administrator

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

Reset Password

Are you sure that you wish to reset the password for: [REDACTED]
 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](#)

4. The **Password Link Sent** page appears. Click **Next** to return to the **User Details** page.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Password Link Sent	
An eMail message has been sent to the user: [REDACTED]	
Note: This password link will only be effective for the next 96 hours .	
<input type="button" value="Next"/>	

NOTE: Until the user follows the link to reset their password, their account access is blocked.

NOTE: The password link is only active for 96 hours.

INACTIVATING A USER ACCOUNT

Follow these steps to inactivate a user's account.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Inactivate**.

Third Party Administrator		Change Agent	Leave Agent
TPA ID:	[REDACTED]	TPA Name:	[REDACTED]
User Details			
User Type:	Agent		
User ID:	[REDACTED]		
First Name:	[REDACTED]		
Middle Initial:	[REDACTED]		
Last Name:	[REDACTED]		
Telephone:	[REDACTED]		
eMail:	[REDACTED]		
Employee ID #	[REDACTED]		
PIN Code #	[REDACTED]		
Department Code:	Select one		
Effective Start Date:	1/26/2010		
Effective End Date:	[REDACTED]		
Last Logged On:	7/27/2016		
Incorrect Password Attempts:	0		
Account Status:	Active		
Security Question:	What was the name of your first pet?		
Security Answer:	[REDACTED]		
Comments:	[REDACTED]		
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.		
Employer Roles	View/Edit the roles that this user is assigned to for an employer.		
Previous			

3. The **Inactivate User** page appears. Click **Confirm**.

Third Party Administrator	
TPA ID:	[REDACTED]
TPA Name:	[REDACTED]
Inactivate User	
Are you sure that you wish to inactivate the user: [REDACTED]	
Confirm Cancel	

REINSTATING A USER ACCOUNT

Follow these steps to reinstate a user's account.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Reinstate**.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
User Details	
User Type:	Agent
User ID:	[REDACTED]
First Name:	[REDACTED]
Middle Initial:	[REDACTED]
Last Name:	[REDACTED]
Telephone:	[REDACTED]
eMail:	[REDACTED]
Employee ID [?] :	[REDACTED]
PIN Code [?] :	[REDACTED]
Effective Start Date:	8/1/2011
Effective End Date:	
Last Logged On:	8/8/2011
Incorrect Password Attempts:	0
Account Status:	Active
Security Question:	What is your father's middle name?
Security Answer:	Test
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.
Reinstate	Inactivate the user's access to the system.
<input type="button" value="Previous"/>	

3. The **Reinstate User** page appears. Click **Confirm**.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Reinstate User	
Are you sure that you wish to reinstate the user: [REDACTED]	
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

ASSIGN EMPLOYERS AND ROLES

Follow these steps to assign employers and roles to a TPA User ID.

1. Display the **User Details** page for the user by performing the steps in *Searching for User Details*.
2. Click **Employer Roles**.

Third Party Administrator Change Agent Leave Agent

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

User Details

User Type: **Agent**
User ID: [REDACTED]
First Name: [REDACTED]
Middle Initial: [REDACTED]
Last Name: [REDACTED]
Telephone: [REDACTED]
eMail: [REDACTED]
[Employee ID](#) † [REDACTED]
[PIN Code](#) † [REDACTED]
Department Code: **Select one**
Effective Start Date: **1/26/2010**
Effective End Date: [REDACTED]
Last Logged On: **7/27/2016**
Incorrect Password Attempts: **0**
Account Status: **Active**
Security Question: **What was the name of your first pet?**
Security Answer: [REDACTED]
Comments: [REDACTED]

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.
Employer Roles	View/Edit the roles that this user is assigned to for an employer.

[Previous](#)

3. The **Assign Employers and Roles** page appears.

Third Party Administrator Change Agent Leave Agent

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

Assign Employers and Roles

A user must be assigned to an employer in order for the user to perform the function on behalf of the employer. To assign all employers to a user select the 'assign all employers' checkbox below and select 'Save'. To assign a single employer to a user, use the search function below to locate the employer, click the 'assign' check box and select 'Save'. To remove an employer from a user, uncheck the 'assigned' check box and select 'Save'. To view all employers assigned to the user select 'Yes' from the 'Assigned' dropdown and select 'Search'.

User Information

Type: **Agent**
User ID: [REDACTED]
Name: [REDACTED]

Assign All Employers

Assign all roles for all employers:

Save

Employer Search

Employer Name: [REDACTED]
Employer Account Number: [REDACTED]
FEIN: [REDACTED]
Role: All
Assigned: All

Search **Reset**

4. To assign all employers to a user select the **Assign all employers** checkbox below and select **Save**.
5. To assign a single employer to a user, use the search function below to locate the employer, click the **Assign** check box and select **Save**.
6. To remove an employer from a user, uncheck the **Assigned** check box and select **Save**.

Correspondence

ABOUT CORRESPONDENCE

Introduction

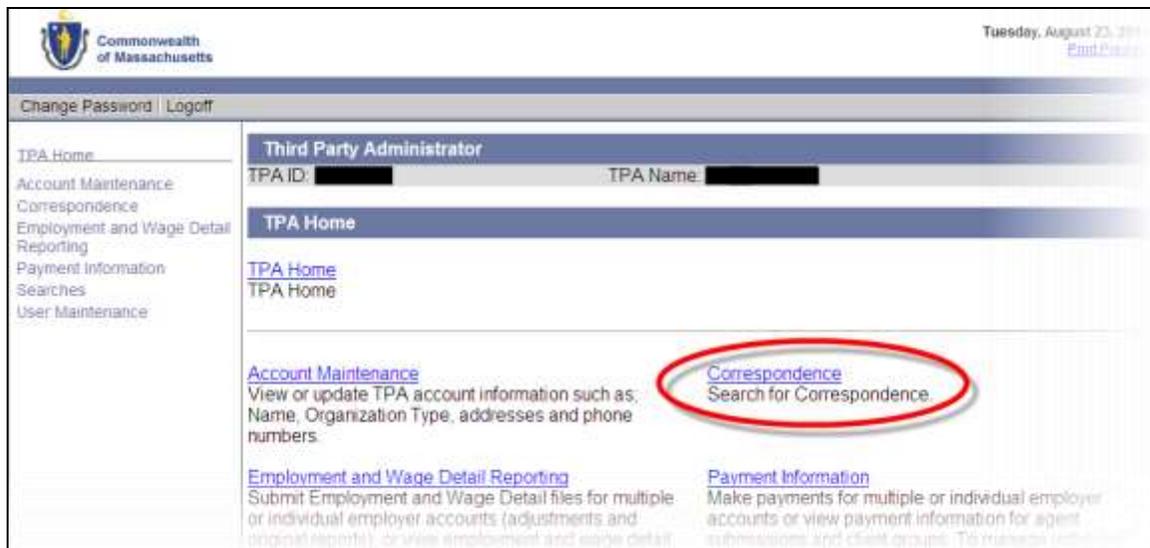
This section describes how to view correspondence sent from DUA to the TPA account on the UI Online system. All correspondence will be sent to your UI Online account except for ad-hoc and registration correspondences. You will be notified via email when a correspondence is sent to your account. You must login to the UI Online system to view the correspondence. You can set up your preferred email address to receive notifications using the instructions provided in the *Address Information* section of this user guide.

NOTE: You must have Adobe Reader software installed to view the correspondence. This software can be downloaded free from www.adobe.com.

NAVIGATING TO CORRESPONDENCE

To navigate to **Correspondence**, perform the following steps:

1. Log in to UI Online. Click the **Correspondence** link in the left pane or the main pane of the Employer Home page.



2. The **Correspondence** page appears.

SEARCHING FOR CORRESPONDENCE

Search for correspondence by performing the following steps:

1. Log in to UI Online and click **Correspondence**.
2. The **Correspondence Search** page appears. Enter **Date Range From** and **To** dates. Click **Search**.

Third Party Administrator	
TPA ID: [REDACTED]	TPA Name: [REDACTED]
Correspondence Search	
Date Range From: [] (mm/dd/yyyy)	To: [] (mm/dd/yyyy)
<input type="button" value="Search"/> <input type="button" value="Reset"/>	

3. The search results appear in the **Details** area below the search grid. Click a **Document ID** number to display a PDF version of the actual correspondence in Acrobat Reader.

Third Party Administrator			
TPA ID: [REDACTED]	TPA Name: [REDACTED]		
Correspondence Search			
Date Range From: 5/1/2011 (mm/dd/yyyy)	To: 8/1/2011 (mm/dd/yyyy)		
<input type="button" value="Search"/> <input type="button" value="Reset"/>			
Details			
Rows 1-10 of 11	◀ 1 2 ▶	Page 1 of 2	
Document ID	Transaction Date	Form ID	Description
1343941	6/14/2010		Third Party Administrator Role Assignment Notification
1895479	6/15/2011		Third Party Administrator Role Assignment Notification
1889386	6/2/2011		Third Party Administrator Role Assignment Notification
1895513	6/15/2011		Third Party Administrator Role Assignment Notification
Rows 1-10 of 11	◀ 1 2 ▶	Page 1 of 2	

Searches - Employer Account Access

ABOUT SEARCHING TO ACCESS EMPLOYER ACCOUNT HOME

Introduction

This section describes how search for and navigate into the individual Employer Home pages of assigned Employers. Once at the Employer Home page, TPAs can perform Employer functions on behalf of the Employer. Note that the roles assigned to you by the Employer determine which functions you can perform, and which links appear. See the *UI Online Employer Self Service User Guide* for complete information on all the functions performed from an Employer account.

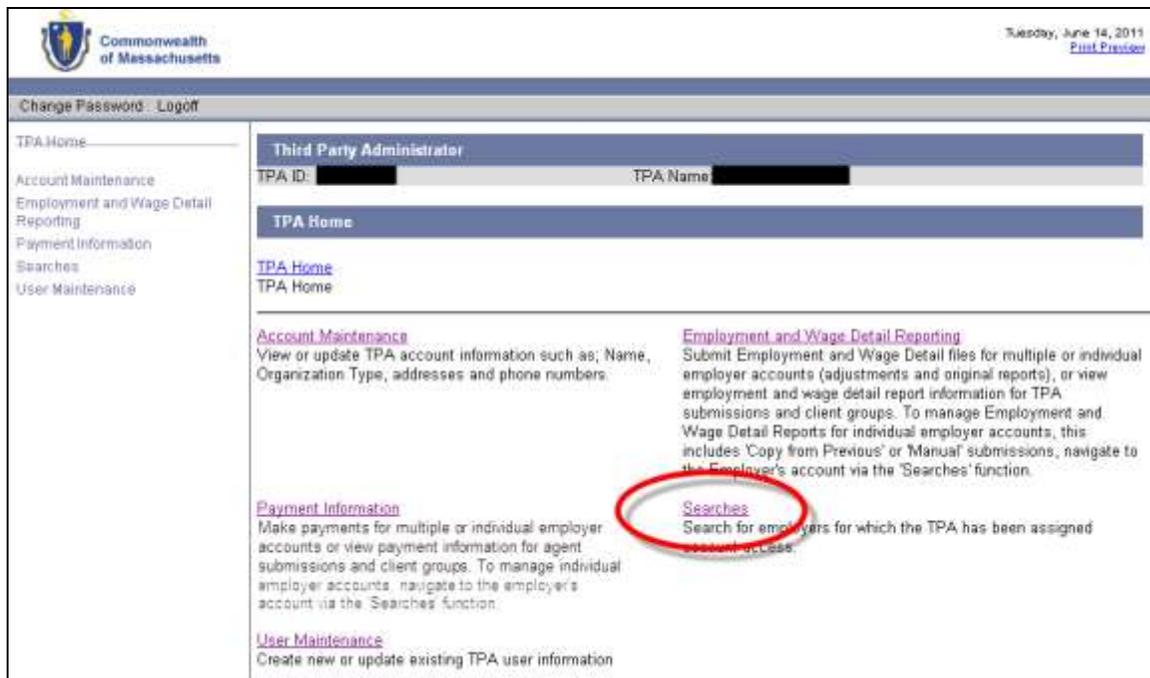
Coordinate with the Employer you are servicing to gain access to roles you require.

NOTE: The Search function can also be used to display TPA role assignments for a specific Employer without navigating into the Employer account.

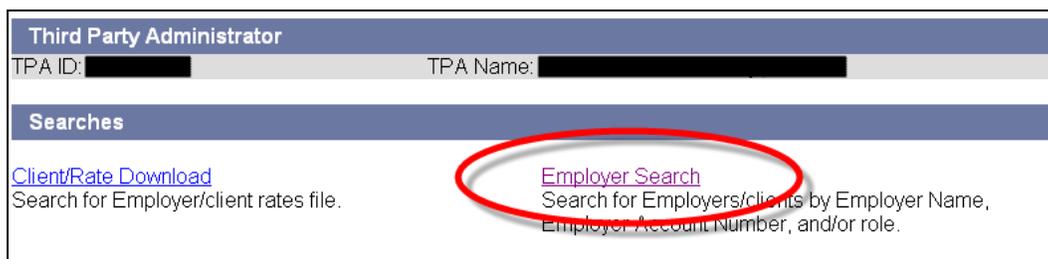
NAVIGATING INTO THE EMPLOYER ACCOUNT

To navigate into an Employer account, perform the following steps:

1. Log in to UI Online. Click the **Searches** link (the link appears in the left pane and the main pane of the TPA Home page).



2. The **Searches** page appears. Click **Employer Search**.



- The **Employer Search** page appears. Enter search criteria, select a **Role**, and click **Search**.

- The **Search Results** appear below the search grid on the **Employer Search** page. Click the **Employer Name** link corresponding to Role that grants access to the functions and/or information you are seeking.

Search Results					
Employer Name	FEIN	EAN	Role	Services Begin Date	Services End Date
Employer XYZ	██████	██████	Account Maintenance Update and Submit	8/18/2010	
Employer XYZ	██████	██████	Payments Update and Submit	8/18/2010	
Employer XYZ	██████	██████	Employment and Wage Detail Update and Submit	8/18/2010	

Select Link for [Role Definitions](#) [Download Employer Details](#)

- The TPA view of the **Employer Home** page appears. From this page you can perform functions on the Employer account, much as the Employer can.

- Click **Leave Employer** to return to the TPA Home page. Click **Change Employer** to redisplay the search grid, where you search for and then navigate into a different Employer account.

VIEWING EMPLOYER-ASSIGNED TPA ROLES

Follow **steps 1** through **3** of the previous section, *Navigating into the Employer Account*. In the search results that display, each Employer-assigned role is listed separately on the page.

Search Results					
Employer Name	FEIN	EAN	Role	Services Begin Date	Services End Date
Employer XYZ	██████	██████	Account Maintenance Update and Submit	8/18/2010	
Employer XYZ	██████	██████	Payments Update and Submit	8/18/2010	
Employer XYZ	██████	██████	Employment and Wage Detail Update and Submit	8/18/2010	

Select Link for [Role Definitions](#) [?] [Download Employer Details](#)

PERFORMING FUNCTIONS AS AN EMPLOYER

For detailed instructions on performing functions from within the Employer account, see the *UI Online Employer Self Service User Guide*.

Searches – Client Rate Download

ABOUT CLIENT RATE DOWNLOADS

Introduction

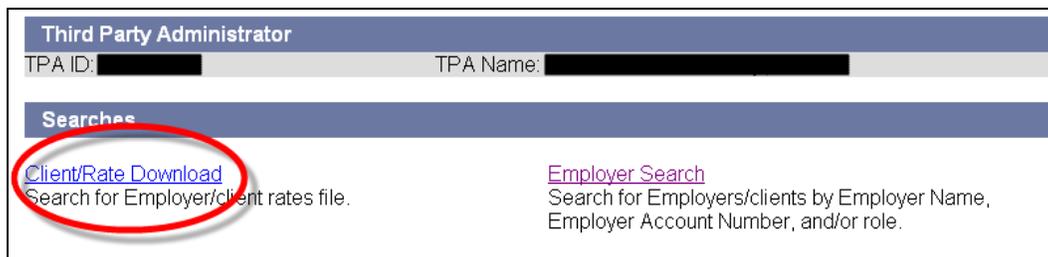
Client Rates for assigned Employers are available for download using the UI Online system. This section describes how TPAs can retrieve client rates using the Search function.

SEARCHING TO RETRIEVE A CLIENT RATE DOWNLOAD FILE

1. Log in to UI Online. Click the **Searches** link (the link appears in the left pane and the main pane of the TPA Home page).



2. The **Searches** page appears. Click **Client/Rate Download**.



- The **Client/Rate Download** page appears. Enter **Date Range From** and **To** values, and click **Search**.

Third Party Administrator

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

Client/Rate Download

Enter dates to search for all rate files created between 'From' and 'To' dates.

Date Range From: (mm/dd/yyyy) To: (mm/dd/yyyy)

- Available download files are listed by **File Id** and **Create Date** in the **Details** area. Click a **File Id** and follow the prompts to save the file to your local drive.

Third Party Administrator

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

Client/Rate Download

Enter dates to search for all rate files created between 'From' and 'To' dates.

Date Range From: (mm/dd/yyyy) To: (mm/dd/yyyy)

[Rate Download File Format](#)[?]

Details

File Id	Create Date
100669	3/25/2010
100669	6/30/2010
100669	10/2/2010
100669	1/5/2011

CLIENT/RATE INFORMATION

The following information is provided in this section:

- Format for the Client Rate Download
- EMAC Contribution Rates
- UI Contribution Rate
- Workforce Training Fund Rate
- USA Surcharge Rate

Format for the Client Rate Download

Header record:

TPA ID, Date Time the Rate File was posted, Rate Year, Average Construction Rate for current year, New Employer Rate for current year, Workforce Training Fund Rate, UI Wage Base, EMAC Wage Base

For each of the Employer Records:

Employer Account Number, Employer Name, Employer UI Contribution Rate, Employer EMAC/UHI rate, USA Surcharge Rate, Employer account balance (debit or credit)

Example for 2016:

```
1000XX,7/2/2016 12:00:00 AM,2016,6.73,1.87,0.056,15000,15000
99999999,ABC INC,7.34,0.34,0,0
99999998,XYZ INC,1.67,0.34,0,{-1974.75}
99999997,ABC LLC,1.56,0.34,0,532.21
99999996,XYZ LLC,11.13,0.34,0,56322.60
```

NOTE: Employer records are displayed in numerical order by Employer Account Number.

Employer Medical Assistance Contribution Rates

The health insurance contribution rate is a flat rate of **0.34 percent** for calendar year 2016 for all subject employers – except for those meeting the exempt or reduced rate criteria. (Employers operating in the 1st two calendar years are exempt as “newly subject” status, and employers in their 3rd and 4th year pay rates of **0.12** percent and **0.24** percent respectively.)

Unemployment Insurance Contribution Rate

Experience rates assigned to Employers are from Schedule C for calendar year 2016. Taxable wage base for contributions is \$15,000 for the year 2016.

Workforce Training Fund Contribution

The flat rate Workforce Training Contribution is **0.056 percent** of the taxable wages in calendar year 2016.

UI ONLINE - TPA User Guide

This payment, which is in addition to the Unemployment Insurance contribution payment, is deposited in the Workforce Training Fund which is used to award grants to companies to provide workforce training and education programs for incumbent workers.

NOTE: Workforce Training Fund and EMAC contributions are not added to an employer's account balance for experience rating purposes, nor can they be deferred.

Addendum

A. HOURS WORKED GUIDELINE

How do I report hours worked? General Rule:

1. If the employer knows the actual number of hours worked, the employer should report that figure.
2. If the employer does not know the actual number of hours worked, the employer should:
 - A. for full-time employees use 40 hours per week.
 - B. for part-time employees, employer should estimate the number of hours.
 - C. for full-time plus, employer should use 40 hours per week plus an estimate.

Overtime:

The employer should report the number of hours actually worked for which overtime pay or compensatory time is paid without regard for the overtime pay rate. Compensatory time should be reported when taken, not when earned.

Fractions of hours:

If the employee's total number of hours in a quarter results in a fractional amount, the total figure should be rounded to the nearest whole hour. If the fraction is "1/2 hour" or more it should be rounded up to the next whole hour, and if it's less than a 1/2 hour, it should be rounded down.

Vacation/sick/holiday pay:

The actual number of hours for which an employee receives vacation, sick or holiday pay should be reported. Vacations, sick days and Holidays without pay should not be counted as hours worked.

On call:

Hours in which the employee is carrying a pager, or is otherwise "on call" should not be included in the "hours worked" calculation.

Employees not paid by the hour:

These include salaried workers and those paid by commission. Also included are workers who are paid by the mile, by piecework, by the acre, by the payload, by reductions in rent, or other non-hourly rates. When the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at the rate of 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Wages paid less than once per quarter:

This will occur most often with corporate officers who are paid only once or twice a year. The employer should report the number of hours worked in any quarter in which no wages were paid, along with \$0 wages. Then, when wages or salaries are finally paid, only the hours worked in that specific quarter should be reported. If the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Faculty members of colleges and universities (includes technical and community colleges):

If the faculty member is considered to be a full-time employee, 40 hours per week paid should be reported. If the faculty member is considered to be part-time, an estimate of the actual hours worked should be made.

School teachers

When teachers or other staff work nine months but are paid over 12 months, their hours should be reported in the quarters that they actually work. For part-time faculty, coaches, etc., if hours are not known, employers may establish an hourly rate of pay and divide that into quarterly gross wages to obtain an estimate of hours.

Volunteer Firefighters:

Employers can establish an hourly rate of pay and divide that amount into the quarterly gross wages to obtain an estimate of hours.

B. EMPLOYMENT AND WAGE DATA SUBMISSION GUIDELINES AND INFORMATION

This is a document available at the DUA UI Online website, providing extensive detail for processing Employment and Wage data through the new UI Online System. This document focuses on process flows, key business rules and changes, and provides employers and TPAs the contact information necessary to make the necessary preparations for change. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

C. ICESA FILE FORMAT SPECIFICATIONS

This is a document available at the DUA UI Online website, providing extensive detail with key information, data definitions, and formatting instructions for generating ICESA Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

D. EFW2 FILE FORMAT SPECIFICATIONS

This is a document available at the DUA UI Online website, providing extensive detail with key information, data definitions, and formatting instructions for generating EFW2 Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

E. DELIMITED FILE FORMAT SPECIFICATIONS

This is a document available at the DUA UI Online website, providing extensive detail with key information, data definitions, and formatting instructions for generating Delimited Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

F. WAGE DETAIL FILE UPLOAD TROUBLESHOOTING

Use these general pointers if you are having trouble uploads, or data from uploads does not seem to be handled correctly by the system.

- When wage detail information seems to have imported or calculated incorrectly, many times it is due to an incorrect employee SSN in a wage filing.
 - Always check for typos in SSNs first when reviewing data for problems.
 - For delimited file uploads, always verify that the cells in the delimited file had the right number format. Many cells are formatted as 'Text' expressly to handle data (like SSNs and zip codes) beginning with '0'.
- File uploads are rejected outright if:
 - The Employer Account Number (EAN) is not included in the file name.
 - 25% or more of the errors with the file are fatal errors.

G. LIST OF ERRORS DURING EMPLOYMENT AND WAGE DETAIL UPLOAD

Element: Scenario Description	Record: Specific Line within a File	Edit/Error Message:	Error Code	Notes/Business Rules
Employer Account Number: Missing Account Number in Employer or TPA Submission	Fatal	Missing Employer Account Number	error.missing.ean	If a file is submitted without an employer account number or an invalid account number, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to the non filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number -	Fatal	Invalid Employer Number - Quarter/Year Not Open	error.invalid.ean	If a file is submitted with an EAN for an employer and the quarter and year for the submission is prior to the subjectivity date for that employer, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to a non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered,

UI ONLINE - TPA User Guide

Element: Scenario Description	Record: <i>Specific Line within a File</i>	Edit/Error Message:	Error Code	Notes/Business Rules
				active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number (this includes alphanumeric invalidity) in Employer or TPA Submission	Fatal	Invalid Employer Number – incorrect format	error.invalid.ean	If a file is submitted with an invalid account number, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number – Does not Exist in Employer or TPA Submission	Fatal	Invalid Employer Number – Does not Exist	error.invalid.ean	If a file is submitted with an employer account number that does not exist, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to the TPA; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
Employer Account Number: Invalid Employer Account Number – Not Authorized to submit for EAN for TPA submissions	Fatal	Invalid Employer Number -- Not Authorized to submit for EAN	error.invalid.ean	Based on TPA Submissions: If a file is submitted with an employer account number for which the TPA is not authorized to submit, the information for that specific set of records will not be accepted. All sub-records (units and wages) will be rejected. If not corrected, the employer will be subject to non-filer penalty and interest on late contribution due. If TPAs do not have employer account numbers, the employer must provide this to them and authorize the TPA for the 'submit' functional role; or, the TPA/employer must register the employer online (UI Staff will not process data without pre-registered, active/valid employer account numbers.).
TPA ID: Not Authorized – TPA has Delinquent Debt	Fatal	Invalid TPA ID – Not Authorized – TPA has Delinquent Debt	Error.invalid.TPA.Deli nquentDebt	The System must reject employment and wage detail submitted by TPAs on behalf of employers if the TPA has delinquent debt of \$1,000 or more (See use case: Establish Delinquent Debt).

UI ONLINE - TPA User Guide

Element: Scenario Description	Record: <i>Specific Line within a File</i>	Edit/Error Message:	Error Code	Notes/Business Rules
TPA ID: Not Authorized – TPA has delinquent employment and wage reports	Fatal	Invalid TPA ID - Not Authorized – TPA has delinquent employment and wage reports	Error.invalid.TPA.DelinquentEmployment andWageReports	The System must reject employment and wage detail submitted by TPAs on behalf of employers if the TPA is delinquent in filing their employment and wage report for two or more consecutive quarters.
Invalid File – 25% or more record errors	Fatal	Invalid File – 25% or more record errors	Error.invalid.file	The System will reject a file where 25% or greater of the total records have fatal record errors.
Employer Unit ID: Missing Unit Identifier in TPA or Employer Submission	Non-Fatal	Missing Unit Number	error.missing.unitid	<p>The records will be identified as an error, but the employer could note to "Ignore the Errors" and proceed to "Process and Calculate for the online file upload process. System will assign records to the Parent. System will display error message:</p> <p>Missing Reporting Unit on line {0}. If Reporting Unit is not reported, employee data will be processed and associated with the Parent.</p> <p>For FTP the records will be identified as an error and assigned to the Parent.</p>
Employer Unit ID: Invalid Unit Identifier in TPA or Employer Submission	Non-Fatal	Invalid Unit Number	error.invalid.unitid	<p>Invalid records are considered those that do not match the employer's recorded units or include alpha characters.</p> <p>The records will be identified as an error, but the employer could note to "Ignore the Errors" and proceed to "Process and Calculate for the online file upload process. System will assign records to the Parent.</p> <p>For FTP the records will be identified as an error and assigned to the Parent.</p>
SSN: Missing SSN in TPA or Employer Submission, all other information included.	Fatal	Missing Social Security Number	error.missing.ssn	SSN is required field. Records without a SSN will be rejected and not included in calculations.
SSN: Invalid SSN in TPA or Employer Submission, all other information included.	Fatal	Invalid Social Security Number	error.invalid.ssn	Invalid SSNs include alpha-submissions or System identified invalid SSNs. These include: 123456789, 987654321, 000000000, 111111111, 222222222, 333333333, 444444444, 555555555, 666666666, 777777777, 888888888, 999999999, or SSNs with the last four digits as 0000. Must be 9 digits. Records without a valid SSN will be rejected and not included in calculations.

UI ONLINE - TPA User Guide

Element: Scenario Description	Record: Specific Line within a File	Edit/Error Message:	Error Code	Notes/Business Rules
SSN: Duplicate SSN within Unit-EAN in TPA or Employer Submission, all other information included.	Fatal	Duplicate Social Security Number within Unit	error.duplicate.ssn	Duplicate SSN within unit will be rejected and not included in calculations.
First Name: Missing First Name, all other data available.	Non-Fatal	Missing First Name	error.missing.firstname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed
First Name: Invalid First Name, all other data available.	Non-Fatal	Invalid First Name	error.invalid.firstname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed, and message, "Invalid first name on line {0}". Record contained numeric characters. Names must be alpha. The record will be processed and included in calculations. Missing names may create benefit issues for the employee."
Last Name: Missing Last Name, all other data available.	Non-Fatal	Missing Last Name	error.missing.lastname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed.
Last Name: Invalid Last Name, all other data available.	Non-Fatal	Invalid Last Name	error.invalid.lastname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed and message, "Invalid last name on line {0}". Record contained numeric characters. Names must be alpha. The record will be processed and included in calculations. Missing names may create benefit issues for the employee."
Last Name and First Name: Missing both First and Last Name, but SSN is available.	Non-Fatal	Missing First and Last Name	error.missing.lastname error.missing.firstname	Must be alpha. Error will be produced for each missing record, but if all other data is available, record will be processed.
Middle Initial: Invalid/Numeric	Non-Fatal	Numeric Middle Initial	error.invalid.middleinitial	Must be alpha. Or display error message: Invalid middle initial on line {0}. Record contained numeric characters. Names must be alpha. The record will be processed and included in calculations. Missing names may create benefit issues for the employee.

Element: Scenario Description	Record: Specific Line within a File	Edit/Error Message:	Error Code	Notes/Business Rules
UI Gross Wages: Missing Records within Employer or TPA Submission.	Fatal	Missing Gross Wages	error.missing.grosswages	Gross Wages must include at least a "0" and must be a positive numeric value. Records without Gross Wages will not (can not) be included for calculations. Employer can submit "0" hours and "0" wages.
UI Gross Wages: Records include comma separating hundreds and thousands within Employer or TPA submission.	Fatal	Gross Wages Contain Commas	error.commas.grosswages	No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For TPAs, if all other Employer records are correct, other records will be processed. NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.
UI Gross Wages--: Invalid records/non-numeric in employer or TPA submission.	Fatal	Gross Wages Contain Non-Numeric Values	error.invalid.grosswages	No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For Employers, individual records would be rejected, but if all or most records contained this error the file would be rejected. NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.
MA Wages Subject to Withholding: Missing Records within Employer or TPA Submission	Fatal	MA Wages Subject to Withholding Missing	error.missing.DORwithholding wages	MA Wages Subject to Withholding must include at least a "0" and must be a positive numeric value. Records without MA Wages Subject to Withholding will not (can not) be included for calculations
MA Wages Subject to Withholding : Invalid Records within Employer or TPA Submission	Fatal	MA Wages Subject to Withholding Invalid	error.invalid.DORwithholding wages	MA Wages Subject to Withholding must include at least a "0" and must be a positive numeric value. Records without MA Wages Subject to Withholding will not (can not) be included for calculations. No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For TPAs, if all other Employer records are correct, other records will be processed. NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.
MA Income Tax Amount Withheld: Missing Records within Employer or TPA Submission	Fatal	MA Income Tax Amount Withheld Missing	error.missing.DORAmount Withheld	MA Income Tax Amount Withheld must include at least a "0" and must be a positive numeric value. Records without MA Income Tax Amount Withheld will not (can not) be included for calculations

Element: Scenario Description	Record: Specific Line within a File	Edit/Error Message:	Error Code	Notes/Business Rules
MA Income Tax Amount Withheld Invalid Records within Employer or TPA Submission	Fatal	MA Income Tax Amount Withheld Invalid	error.invalid.DORAmount Withheld	MA Income Tax Amount Withheld must include at least a "0" and must be a positive numeric value. Records without MA Income Tax Amount Withheld will not (can not) be included for calculations No commas will be accepted, but the decimal for cents will be accepted. If commas are included, for delimited files, the entire file may be off-sync and could create a fatal file error. For TPAs, if all other Employer records are correct, other records will be processed. NOTE: Need to ensure that the system does not move the decimal over two spaces to the left if the decimal is given. For example 5000.00 should read as five thousand not fifty dollars.
Hours Worked: Missing Hours Worked within Employer or TPA Submission	Non-Fatal	Missing Hours Worked	error.missing.hoursworked	Missing hours will default to zero
Hours Worked: Invalid/Non-Numeric, Negative, and/or Larger than Possible.	Non-Fatal	Invalid Hours Worked	error.invalid.hoursworked	Negative or non-numeric hours will default to zero. Hours in excess of 999 will default to 999.
Officer Code: Invalid	Non-Fatal	Invalid Officer Codes	error.invalid.officercode	Default to "No" if invalid. Error would be produced. If missing, system will default to "No" without an error being produced.
Employment (1-2-3): Missing Data	Fatal	Missing 12th of Month Data	error.missing.month12	If the field is left blank, the system will reject the record and provide error message.
Employment (1-2-3): Invalid - Non-Numeric Data	Fatal	Invalid/Non-Numeric 12th of Month Data	error.invalid.month12	If the field is invalid, the system will reject the record and provide error message.
Quarter/Year: Missing quarter/year	Fatal	Missing quarter and year	error.missing.quarteryear	Quarter/year layout: Delimited - yyyyq (Quarter 1 2004 = '20041') ICESA - mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004') EFW2 - mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004')
Quarter/Year: Invalid quarter/year	Fatal	Invalid quarter and year format	error.invalid.quarteryear	Quarter/year layout: Delimited - yyyyq (Quarter 1 2004 = '20041') ICESA - mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004') EFW2 - mmyyyy (last month in the quarter being filed and year, for example Quarter 1 2004 = '032004')

Element: Scenario Description	Record: <i>Specific Line within a File</i>	Edit/Error Message:	Error Code	Notes/Business Rules
Quarter/Year: Quarter/year for record does not match quarter/year select for online file upload by employer	Fatal	Invalid quarter and year – does not match quarter/year selected	error.invalid.quarteryear	If the quarter/year for the record does not match the quarter/year selected by the employer for the online file upload process, the System will produce a fatal error.
Quarter/Year: Quarter/year for record is prior to 2010	Fatal	Invalid quarter and year – prior to 2010	error.invalid.quarteryear	<p>If a record has a quarter/year <2010 and the filing is intended for the > Q4 2009 wage detail process, the system will reject the record.</p> <p>If a record has a quarter year > Q4 2009 and the filing is intended for the Prior to 2010 process, the system will reject the record.</p> <p>Wage records with qtr/yr prior to 2010 should not be mixed with > Q4 2009 records.</p> <p>NOTE: Prior to 2010 wage detail is indicated by the user selecting the Prior to 2010 link. For FTP filers a separate folder will be set up for prior to 2010 wage files.</p>

H. REGISTRATION TO PAY DUA TAXES VIA ACH CREDIT

(See the following page.)



**THE COMMONWEALTH OF MASSACHUSETTS EXECUTIVE OFFICE
OF LABOR AND WORKFORCE DEVELOPMENT DEPARTMENT OF
UNEMPLOYMENT ASSISTANCE**

REGISTRATION TO PAY DUA TAXES VIA ACH CREDIT

Company Name: _____

*DUA Employer Account Number: _____

Federal Identification Number: _____

Street: City: _____ State: _____ Zip: _____

**Agent/Professional Tax Preparer/ Third Party ID Number: _____

Contact Person: _____

Email: _____

(Please print clearly – you will only receive confirmation via email)

Telephone Number: _____ Fax: _____

Mail Form To: Department of Unemployment Assistance
Attn.: Revenue Service, Employer Reports Unit, 3rd Floor
19 Staniford Street
Boston, MA 02114

Or

Email Form To: EmployerReport@MassMail.State.MA.US

Note: After submittal of this registration, if approved, you will be provided via email with the DUA mandated ACH credit record layout and DUA bank account and routing transit numbers.

*Employers must have a DUA Employer Account Number (EAN) to apply.

**Agent/Professional Tax Preparer/Third Party computing their client's amount owed and/ or filing this form on behalf of their clients, must register with the UI Online system as a TPA and receive a TPA ID number. This TPA ID number must be included on this form as part of the registration for ACH Credit Processing. To apply for a TPA ID number, go to: www.mass.gov/uima and click on: Agent Login – TPA Registration.

If you want to pay online, please register with UI Online and pay via ACH Debit.