TPA-Employer Relationship Mini Guide
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2. INTRODUCTION

This document is a reference for understanding the TPA-Employer Relationship functions, which includes the following:

- Assign and maintain a TPA
- Update user access to TPA account
- End TPA relationship
3. TPA-EMPLOYER RELATIONSHIP FUNCTIONS

This section will provide information on the TPA-Employer Relationship functionality. It documents the steps to perform the following:

- Assign and Maintain TPA
- Update User Access to TPA Account

3.1 Assign and Maintain TPA

This sub-section describes the actions necessary to authorize a TPA to access an employer account. To assign access, the TPA must be registered in CONNECT and have been assigned an ID number.

This sub-section documents the steps necessary to perform the following:

- View and maintain TPA access
- Authorize and assign a TPA

View and Maintain TPA Access

To view and maintain TPA access for an employer account, please follow the below steps:

Step-by-Step Instructions

1. Select ‘Assign and Maintain TPA’ from the left-hand menu on the Employer Homepage.

2. The Third Party Administrator (TPA) Authorization section lists all of the TPAs authorized to access the employer account.

3. Select the TPA ID hyperlink to view the TPA profile.

4. In the ‘Assigned Roles’ section there is a list of all the access roles assigned to the TPA.

5. Select ‘Modify’ to change assigned roles.
6. In the ‘Assigned Roles’ section, check boxes will appear next to each assigned role to the TPA. Select the appropriate check boxes to remove those roles.

7. In the ‘Roles Not Assigned’ section, check boxes will appear next to each role not assigned to the TPA. Select the appropriate check boxes to add those roles.

8. Select ‘Save’ to update all roles for the TPA.
Authorize and Assign a TPA

To authorize and assign a TPA, please follow the below steps:

**Step-by-Step Instructions**

1. Select ‘New’ to assign a TPA.

2. Enter the TPA ID.

3. Select ‘Next’ to assign the TPA.

4. Enter TPA Services Begin and End Dates.

5. Select the appropriate check box to assign roles to the TPA.

6. Select ‘Save.’
3.2 Update User Access to TPA Account

This sub-section describes the actions necessary to update user access to a TPA account. To update user access, the TPA must be assigned the proper role by the employer in CONNECT.

To update user access to a TPA account, please follow the below steps:

1. Select ‘User Maintenance’ from the left-hand menu.

2. Select ‘Third Party Administrator Roles.’

3. Select the checkbox next to ‘Assign all roles for all employers.’

4. Select ‘Save’ to update roles.

The TPA will not be able to perform certain tasks unless the appropriate role has been assigned by the employer.
3.3 End TPA Relationship

This sub-section describes the actions necessary to end a TPA relationship.

To end a TPA relationship, please follow the below steps:

1. Select ‘Assign and Maintain TPA’ from the left-hand menu.

2. Select the TPA ID hyperlink to view the TPA profile.
3. Select ‘Modify’ to view TPA details.

4. Enter the desired TPA Services End Date.

5. Select ‘Save’ and the TPA Relationship will cease on the desired date.