



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

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:

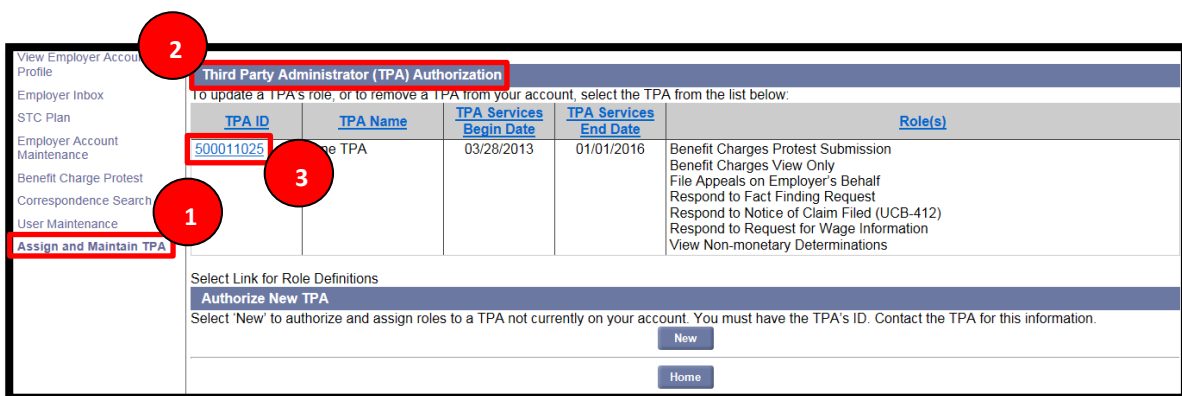
- View and maintain TPA access
- Authorize and assign a TPA

View and Maintain TPA Access

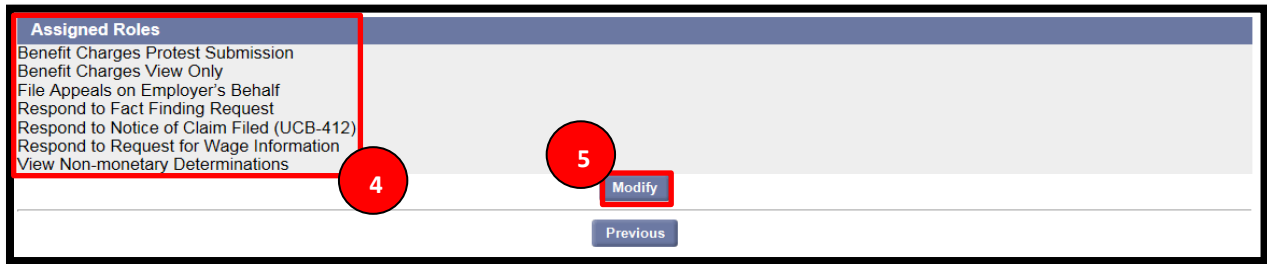
To view and maintain TPA access for an employer account, please follow the below steps:

Step-by-Step Instructions

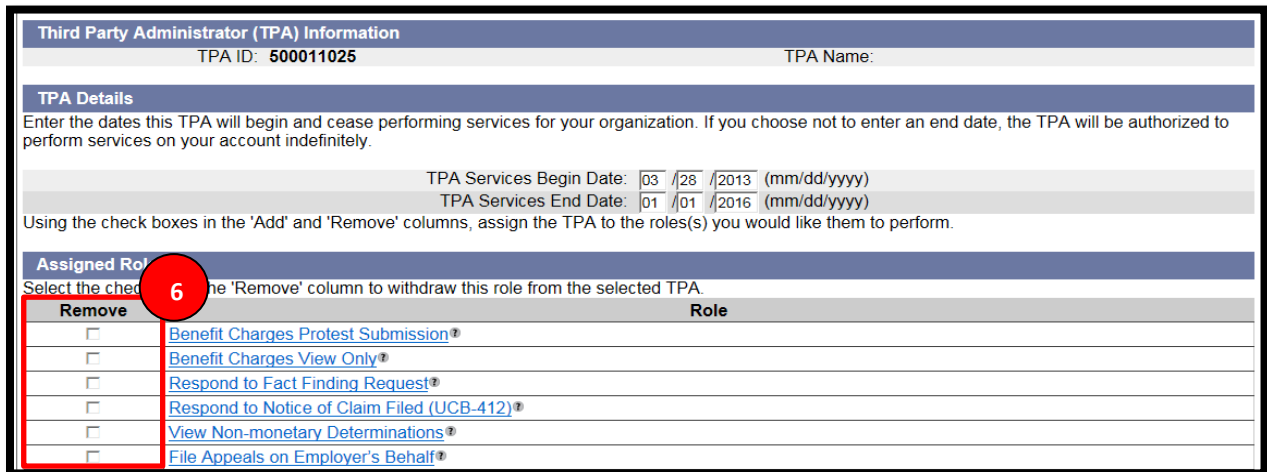
1. Select 'Assign and Maintain TPA' from the left-hand menu on the Employer Homepage.
2. The Third Party Administrator (TPA) Authorization section lists all of the TPAs authorized to access the employer account.
3. Select the TPA ID hyperlink to view the TPA profile.



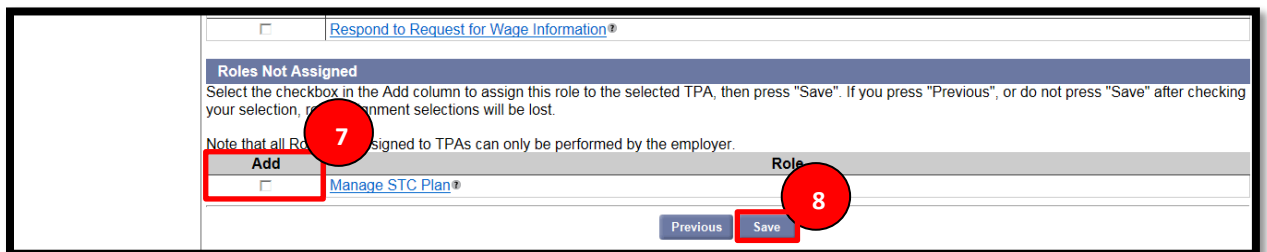
4. In the 'Assigned Roles' section there is a list of all the access roles assigned to the TPA.
5. Select 'Modify' to change assigned roles.



- 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.



- 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.



- 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.

This screenshot shows the 'Assign and Maintain TPA' menu. The 'Authorize New TPA' option is highlighted in blue. A red circle with the number '1' is placed over the 'New' button. Below the menu, there is a 'Home' button.

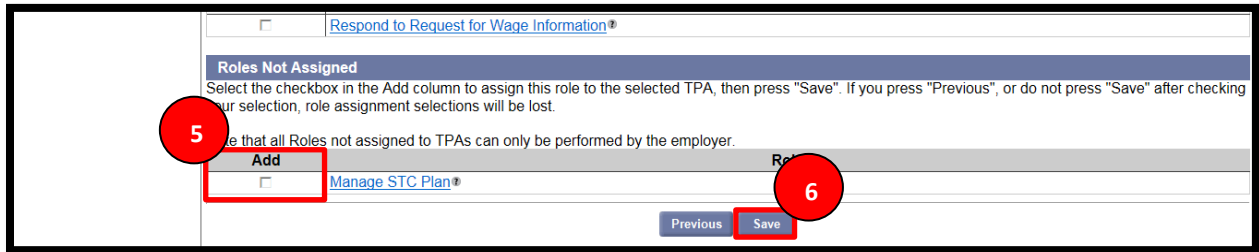
2. Enter the TPA ID.
3. Select 'Next' to assign the TPA.

This screenshot shows the 'Assign Third Party Administrator (TPA)' form. The 'TPA ID' field is highlighted with a red box, and a red circle with the number '2' is placed over it. The 'Next' button is also highlighted with a red box, and a red circle with the number '3' is placed over it. The form contains instructions and a 'Previous' button.

4. Enter TPA Services Begin and End Dates.

This screenshot shows the 'Third Party Administrator (TPA) Information' form. The 'TPA ID' is 500000026. The 'TPA Name' field is empty. The 'TPA Details' section is highlighted, and a red circle with the number '4' is placed over the 'TPA Services Begin Date' and 'TPA Services End Date' fields. The 'Assigned Roles' section shows 'No records found...'. The 'Roles Not Assigned' section contains instructions and a 'Save' button.

5. Select the appropriate check box to assign roles to the TPA.
6. Select 'Save.'



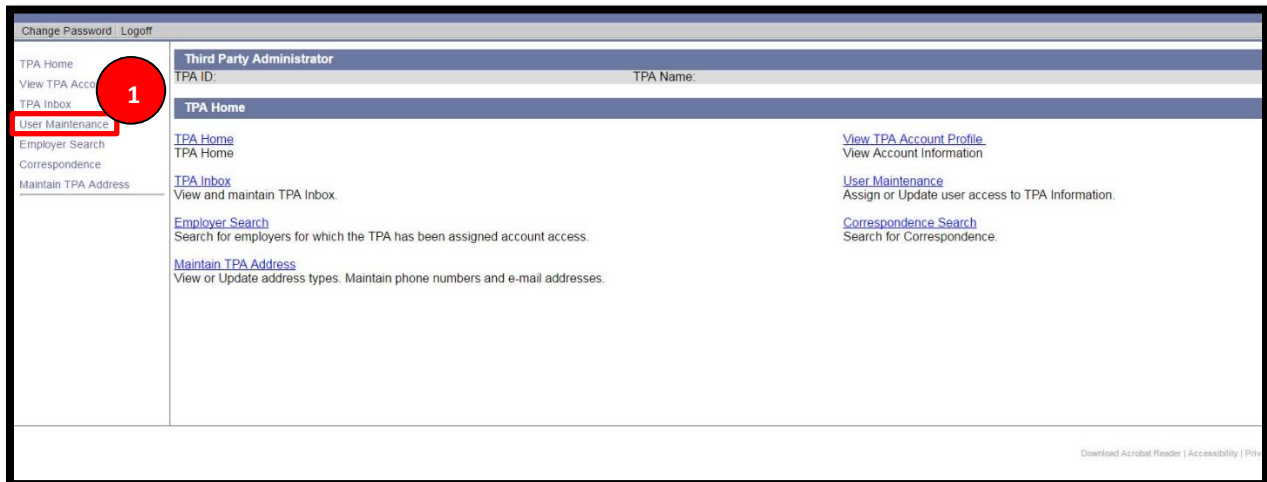
The TPA will not be able to perform certain tasks unless the appropriate role has been assigned by the employer.

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 screenshot displays the TPA interface with the following elements:

- Navigation Menu (Left):** Includes links for Change Password, Logout, TPA Home, TPA Inbox, User Maintenance, **Third Party Administrator Roles** (highlighted with a red circle and '2'), Employer Search, Correspondence, and Maintain TPA Address.
- Header:** Shows 'Third Party Administrator ID: 2017' and 'TPA Name: Employers Edge'.
- Notices:** A message states: 'Your search returned more than 100 results. Only the first 100 results will be displayed. Please select "Reset" and refine the search criteria for specific results.'
- User Information:** Lists 'Type: Agent', 'User ID: tead0011', and 'Name: DEO Test'.
- Employer Search Form:** Contains fields for Employer Name, Employer Account Number, FEIN, Role, and Assigned. A red circle and '3' highlight the 'Assign All Employers' section, which includes a checkbox for 'Assign all roles for all employers:'.
- Employer Search Results Table:** A table with columns: Assigned, Employer Name, FEIN, EAN, and Role. It lists 10 employers with their respective roles. A red circle and '4' highlight the 'Save' button at the bottom of the table.

Assigned	Employer Name	FEIN	EAN	Role
<input checked="" type="checkbox"/>	MEDI-CAR SYSTEMS INC	591996927	0554023	File Appeals on Employer's Behalf
<input checked="" type="checkbox"/>	JIMMES FIRESTONE & SERVICE CENTER INC	592795651	1109040	Benefit Charges Protest Submission
<input checked="" type="checkbox"/>	JIMMES FIRESTONE & SERVICE CENTER INC	592795651	1109040	Respond to Notice of Claim Filed (UCB-412)
<input checked="" type="checkbox"/>	JIMMES FIRESTONE & SERVICE CENTER INC	592795651	1109040	File Appeals on Employer's Behalf
<input checked="" type="checkbox"/>	VOLT MANAGEMENT CORP	133568039	1448706	File Appeals on Employer's Behalf
<input checked="" type="checkbox"/>	ABM JANITORIAL SERVICES - SOUTHEAST LLC	580949708	2028515	Benefit Charges Protest Submission
<input checked="" type="checkbox"/>	ABM JANITORIAL SERVICES - SOUTHEAST LLC	580949708	2028515	View Non-monetary Determinations
<input checked="" type="checkbox"/>	WREST 10 LLC	300720538	3076111	Benefit Charges Protest Submission
<input checked="" type="checkbox"/>	WREST 10 LLC	300720538	3076111	Respond to Fact Finding Request
<input checked="" type="checkbox"/>	PWD-ORLANDO INC	271521352	2933690	Respond to Notice of Claim Filed (UCB-412)