Third Party Administrator (TPA)

Guide to CONNECT

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1.   INTRODUCTION

This document is a reference for navigating system functions as a Third Party Administrator (TPA) in CONNECT.

1.1 Guide Instructions

You will find step-by-step instructions, and this red circle icon: **1** indicates the step number on the screenshot. These are to help you follow along in the guide as you complete the steps yourself on the CONNECT Web site. Please note that the steps are listed before the image.

Sometimes, links or special features of a screen are highlighted with a red rectangle ▭ to make it easier for you to find it on your screen as you follow along.

Helpful hints, tips, and reminders are indicated with a pointed hand symbol and text box.

> *Please note that this icon is where you will find helpful hints, tips, and reminders.*

1.2 CONNECT System Overview

The purpose of the System Overview is to provide a high-level overview of the CONNECT system. It will cover applications and features of CONNECT, users of CONNECT, how to access CONNECT, and how CONNECT benefits claimants, employers, and TPAs.

1.2.1   What is a TPA?

A TPA is a third party entity who performs reemployment assistance benefit activities on behalf of an employer. You must register with DEO as a TPA. Once registered, an employer must then grant a TPA access to the specific functions for which the TPA is responsible. Employers can do this in CONNECT from the Employer Homepage.

1.2.2   What is CONNECT?

CONNECT is a claims management system that claimants use to apply for benefits. Claimants, employers and third parties access information about filed claims, and communicate with DEO Staff through CONNECT.

1.2.3 Where can I access CONNECT?

CONNECT is a Web based system, meaning that anyone with internet access and user credentials can access it. TPAs can access CONNECT by typing or copying the following link into a browser address bar: https://connect.myflorida.com/Agent/Core/Login.ASPX

Users must register for a user identification (ID) and password in order to access CONNECT. The steps to register for a TPA account are covered in Section 2.1., 'Register for a TPA Account.'

1.2.4 What are the benefits of CONNECT?

CONNECT provides easy, online access to all claim related information that TPAs and other users can access anywhere, at any time. CONNECT makes it easier and faster to apply for benefits, resolve issues, and provide information. It provides better processes, systems, and service for claimants, employers, third parties, and DEO Staff, and a stronger connection between RA and Workforce for quicker reemployment. Using CONNECT means:

- Less paperwork
- Less filing
- Faster response time

1.2.5 Who can use CONNECT?

CONNECT is a central system that is accessed by six types of users: claimants, employers, DEO staff, Third Party Representatives (TPRs), Third Party Administrators and Other State and Federal Agencies.

- Claimants – Claimants use CONNECT to apply for benefits, file an appeal, and view and send correspondence
- Employers – Employers use CONNECT to file appeals, and view and send correspondence
- DEO Staff – DEO Staff use CONNECT to evaluate information, authorize payments, adjudicate issues, and maintain data
- Third Party Representatives (TPRs) – TPR's use CONNECT to search and view information about claimants that have provided access to the TPR
- Third Part Administrators (TPAs) – TPAs perform reemployment assistance benefit activities on behalf of an employer, and the employers provide the TPA access to specific information
- Other State and Federal Agencies – Other state and federal agencies have contracts that outline the specific information that they can access in CONNECT

2.   NAVIGATE CONNECT AS A TPA

This section covers all of the steps required to login to CONNECT as a TPA, and covers the following topics:

- Register for a TPA Account
- Log in to a TPA Account
- Navigate TPA Functions in CONNECT

2.1   Register for a TPA Account

This section provides instructions on how to register for a new agent account in CONNECT. This section documents the steps necessary to perform the following:

- Identify required information to create new TPA account
- Register for a TPA Agent Account
- Obtain an TPA Agent ID and password

Step-by-Step Instructions:

To register for a TPA Account, please follow the following steps:

1. Type or copy the CONNECT URL into your browser address bar:
   https://connect.myflorida.com/Agent/Core/Login.ASPX
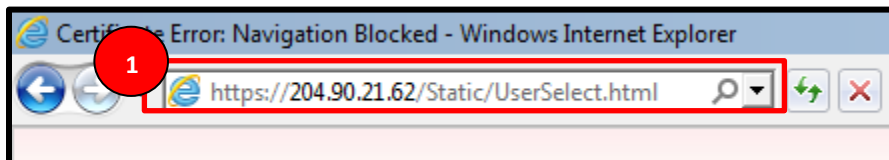
2. Add the CONNECT link to your favorites by selecting the 'Star' icon
3. Select 'Add to favorites…'
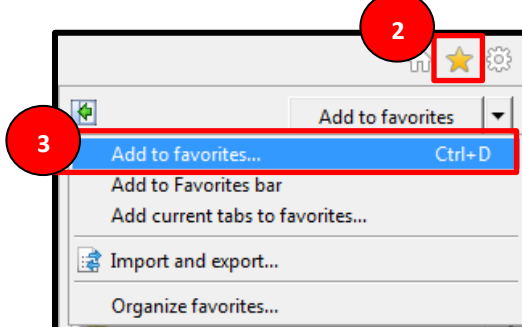
4. Type 'CONNECT Login Page' into the 'Name' field.
5. Select 'Add.'
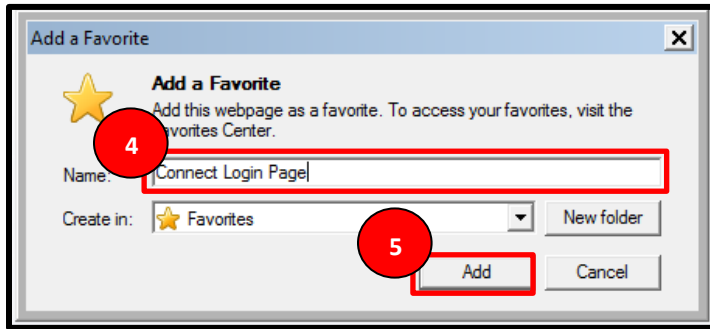
6. On the TPA Login Page, select the 'TPA Registration' link from the left-hand menu or the 'Helpful Resources' section at the bottom of the screen.

7. Review the TPA registration information.
8. Enter address information.
9. Select correspondence type.
10. Enter user information.
11. Enter the Federal Employer Identification Number (FEIN) for your associated employer.
12. Select 'Next.'

13. Confirm your address by selecting the radio button next to the appropriate possible match, or use the address you entered by selecting the radio button next to the address in the 'User Entered Address' section.
14. Select 'Next.'

15. Review your TPA Registration information.
16. Confirm your FEIN information.
17. Select 'Submit.'

18. View your TPA ID.

☞ Write down your TPA ID, your User ID, and your Password so that you don't forget it.

19. Activation is complete – select Login to create your permanent password and manage your account information

2.2   Log in to a TPA Account

This section covers the steps required to log in to a TPA Account for the first time, and covers the below topics:

- Set TPA User ID and Password
- Navigate the TPA Home Page

2.2.1   Set TPA User ID and Password

This section describes the necessary actions to login to your TPA account, and documents the steps necessary to perform the following:

- Enter your User ID and Password
- Set your permanent password
- Resolve password issues

Step-by-Step Instructions:

To login to your TPA account, please follow the steps below:

1. Enter your User ID and Password that was provided when you registered as a TPA.
2. Select 'Login.'

> ☞   After four unsuccessful login attempts, your account will be locked.

3. Select the 'password guidelines' hyperlink for more information about creating a permanent password.
4. Enter the required data fields in the 'Reset Password' section.
   a. Enter your new password.
   b. Enter your security questions and answers.
   c. Enter a 4-digit PIN code.
5. Select 'Save.'

6. Once you have set up your password and security questions, you will use this information to login to your CONNECT TPA Account.
7. If you forget the password that you set up, you have the option to select 'Forgot Password' from the CONNECT Login Page.

8. You will need to reset your password on the next screen.
9. Enter the required fields, and respond to your security questions.
10. Select 'Submit' to reset your password.

2.2.2 Navigate the TPA Home Page

This section describes the features and functions of the TPA Homepage, documents the steps necessary to perform the following:

- Navigate the left-hand menu
- Log out of the TPA account

> The links that you see on these screens may not be visible to you depending on the access that the employer provided you.

Step-by-Step Instructions

To navigate the TPA Homepage, please follow the steps below:

1. Select 'View TPA Account Profile' to view the TPA account profile.
2. Select 'TPA Inbox' to view the TPA Inbox.
3. Select 'User Maintenance' to update user access to your TPA account.
4. Select 'Employer Search' to search and view employer information.
5. Select 'Correspondence Search' to search and view DEO correspondence.
6. Select 'Logoff' to log out of your account.
7. Select 'Change Password' to change your password.

8. Select 'Print Preview' to view the Web page information into a print-ready format.
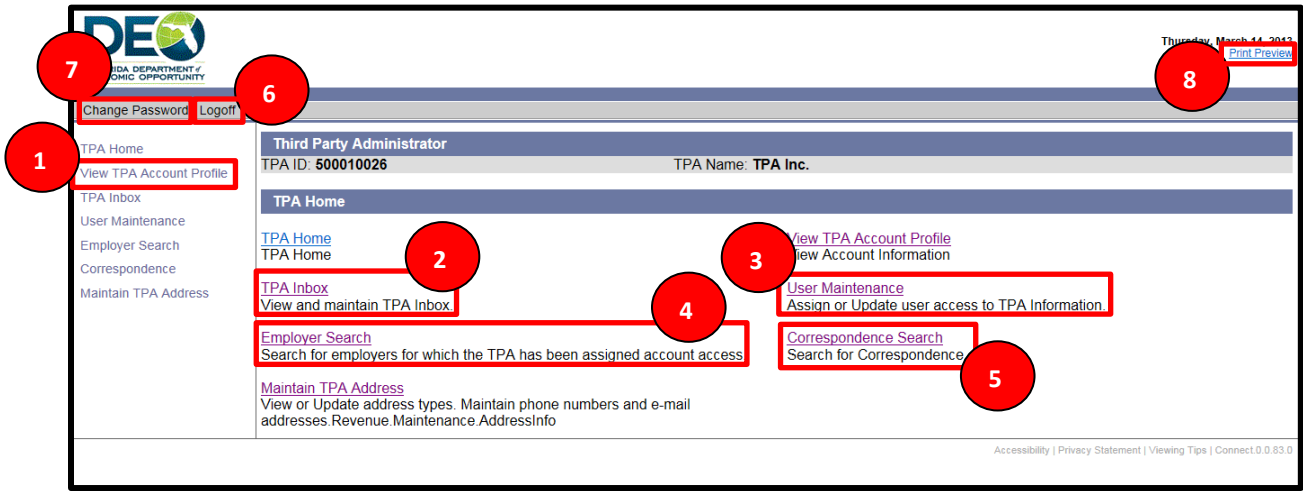
2.3   Navigate TPA Functions in CONNECT

This section will cover the CONNECT functions that a TPA can access and use in CONNECT, and covers the following topics:

- Access the TPA Inbox
- Perform Employer Searches
- Maintain TPA CONNECT Account Users
- Maintain TPA Address
- Manage TPA Correspondence

2.3.1   Access the TPA Inbox

Step-by-Step Instructions

To access the TPA Inbox, follow the below steps:

1. Select 'TPA Inbox' from the TPA Homepage left-hand menu.
2. Select the EAN from the drop-down menu.
3. Enter the 'Action Due Date' or 'Created on Date' in the necessary fields.
4. Select the Subject from the drop-down menu, and select 'Search.'
5. View the results in the 'Search Results' section.
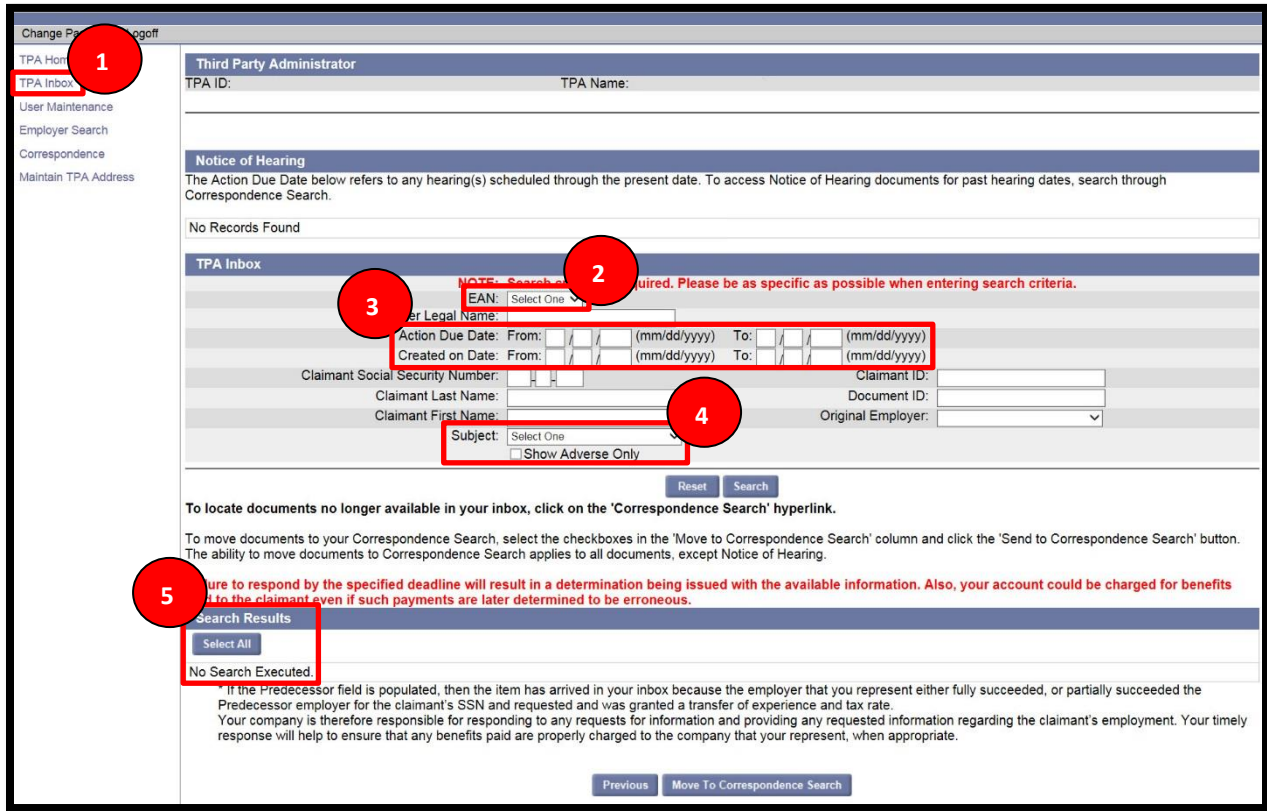
2.3.2 Search for Employers

This section covers the steps to search for employers and access an individual employer's CONNECT profile.

Step-by-Step Instructions

To search for employer information, follow the below steps:

1. Select 'Employer Search' from the left-hand menu on the TPA Homepage.
2. Enter the Employer data fields.
   a. Enter Name into the first data field.
   b. Enter the Employer Account Number (EAN) into the second data field.
   c. Enter the Employer FEIN (Federal Employer Identification Number) into the third data field.
   d. Select the appropriate role from the 'Role' drop-down menu.
3. Select 'Search.'
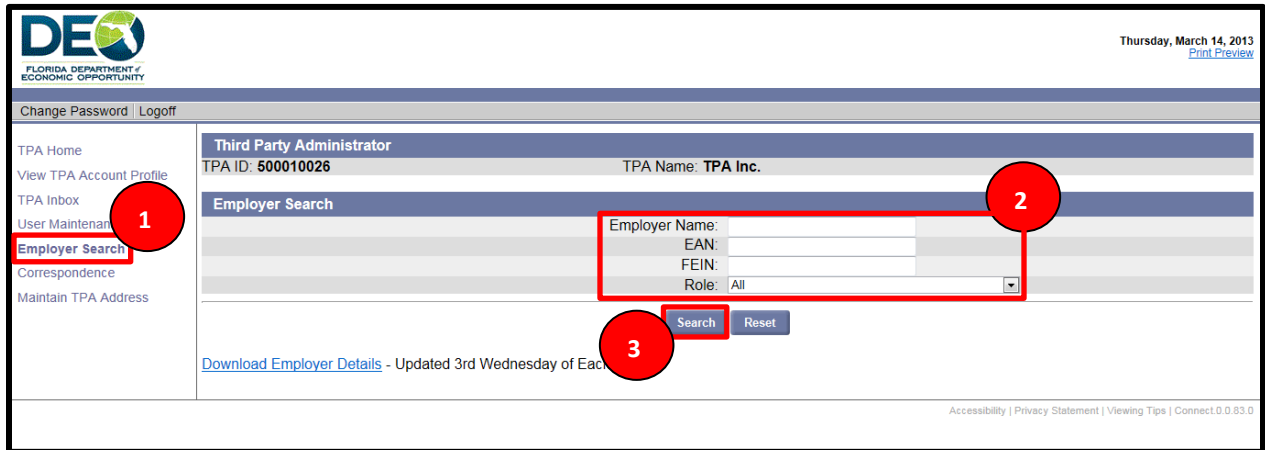
4. The search results will populate with employers that match the search fields you entered.
5. Next to the employer name, you will see the Role(s) that the employer assigned to your TPA Account.
6. For definitions of what these roles can complete, select the 'Role Definitions' hyperlink in the lower left-hand corner of the screen.
7. Select an employer from the search results by clicking on the Employer Name hyperlink.
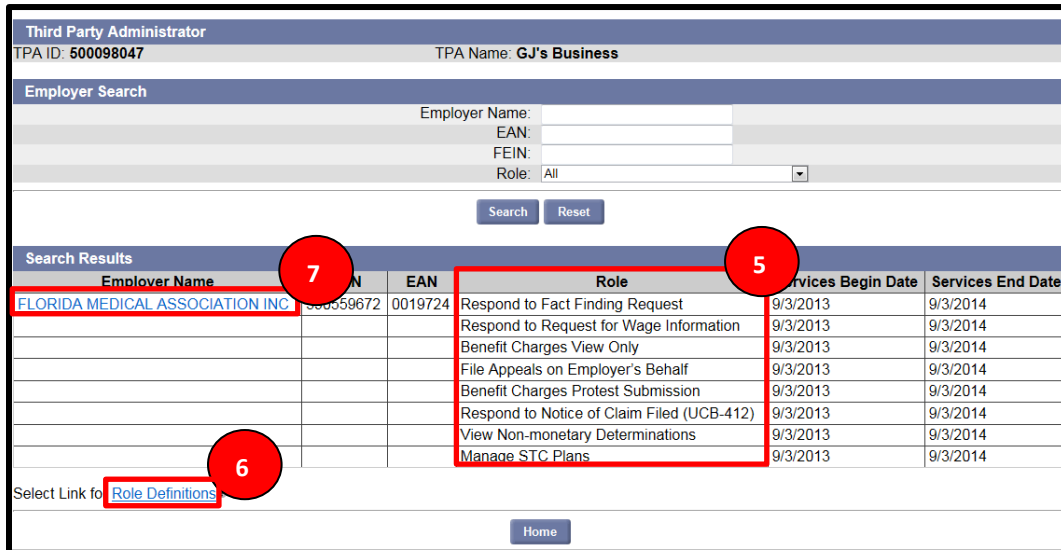
8. The following screen will appear with the Employer information.
9. Here, you can select 'Short Time Compensation' to manage or add an STC Plan for an employer.
10. Or, you can select 'Benefit Charge Protest' to protest benefit charges for an employer.
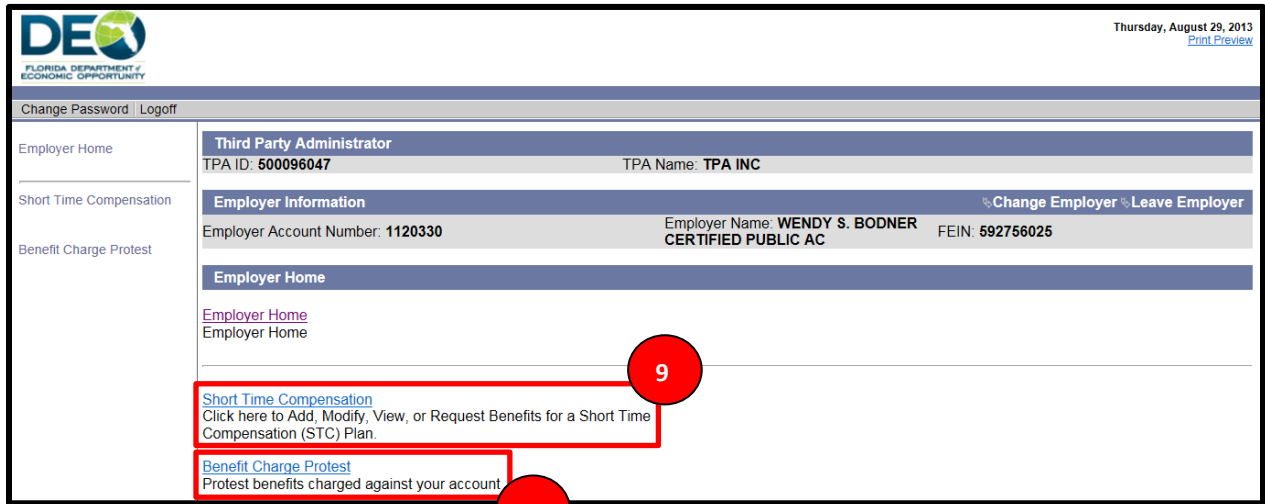
2.3.3 Maintain a TPA Account

This section covers the information that TPA users will need to maintain their accounts, and includes information on how to update a mailing address and view address history, and update correspondence preference.

Step-by-Step Instructions

To maintain a TPA Account, follow the below steps:

1. Select 'Maintain TPA Address' from the TPA Homepage left-hand menu.
2. View address information.
3. Select 'Update Mailing Address' to update mailing address.
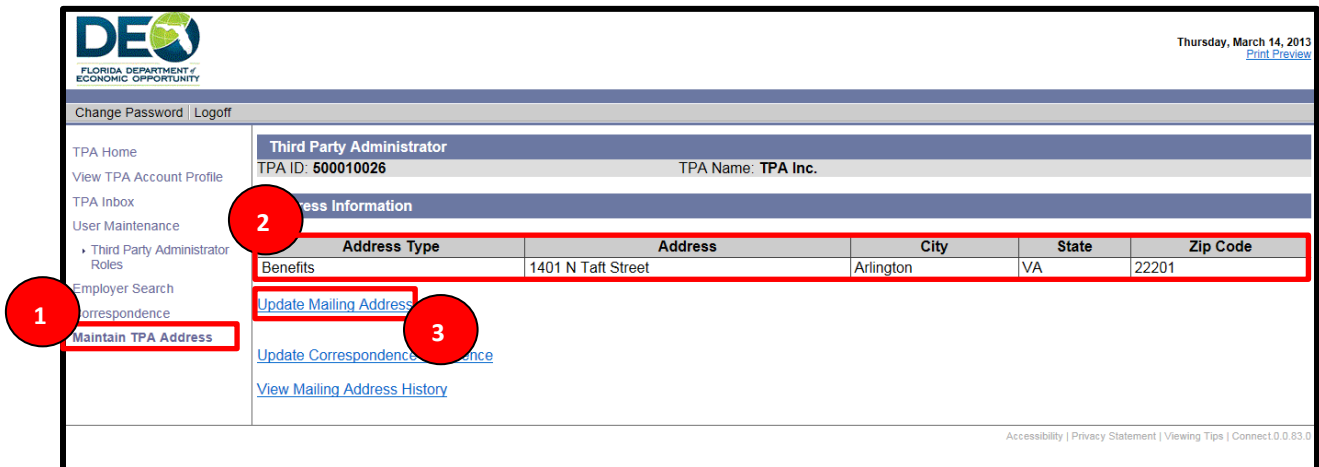
4. Enter address information into the data fields.
5. Select 'Next.'

6. Select 'Update Correspondence Preference' to change the method that you receive correspondence from DEO.

7. Select the radio button next to your preferred correspondence type.
8. Select 'US Mail' if you prefer to receive DEO notifications in the mail. By selecting 'US Mail' you will receive only your Action Item Notices via mail.
9. Select 'Electronic' if you prefer to receive DEO notifications via email. By selecting 'Electronic' you will receive only your Action Item Notices via the email.
10. If you select 'Electronic,' enter your email address.
11. Select 'Next.'

☞   A mandate went into effect on April 25, 2016 requiring that all responses to DEO requests be made electronically.

12. Select 'View Address History' to view the Address History information.

13. All of the addresses registered in CONNECT in the past will be listed.

2.3.4 Maintain TPA Account Users

Step-by-Step Instructions

To maintain the access of users assigned to your TPA Account, follow the below steps:

1. Select 'User Maintenance' from the left-hand menu.
2. Select the 'Third Party Administrator Roles' link.
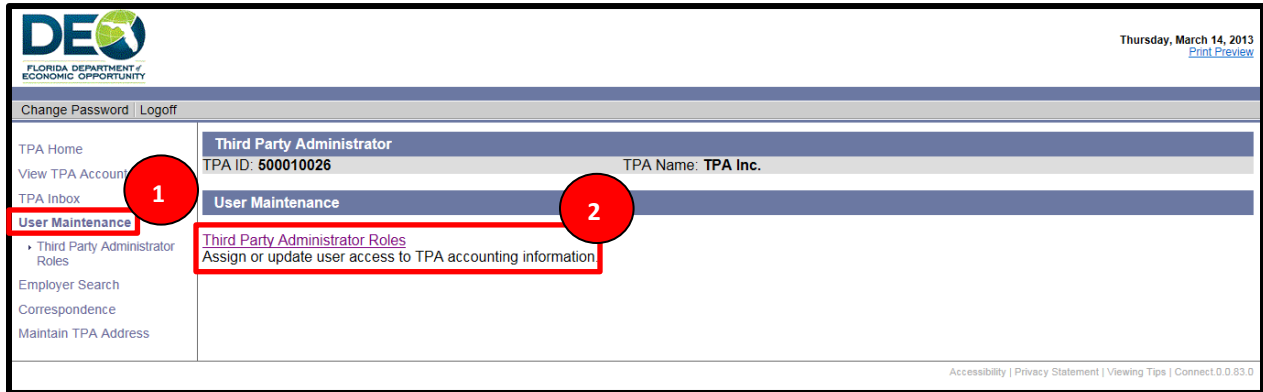
3. Search for users by entering information into the data fields:
   a. Enter User ID.
   b. Enter Last Name.
   c. Enter First Name.
   d. Select roles from the drop-down menu.
4. Select 'Search.'
5. If you need to add a new user, select 'New.'
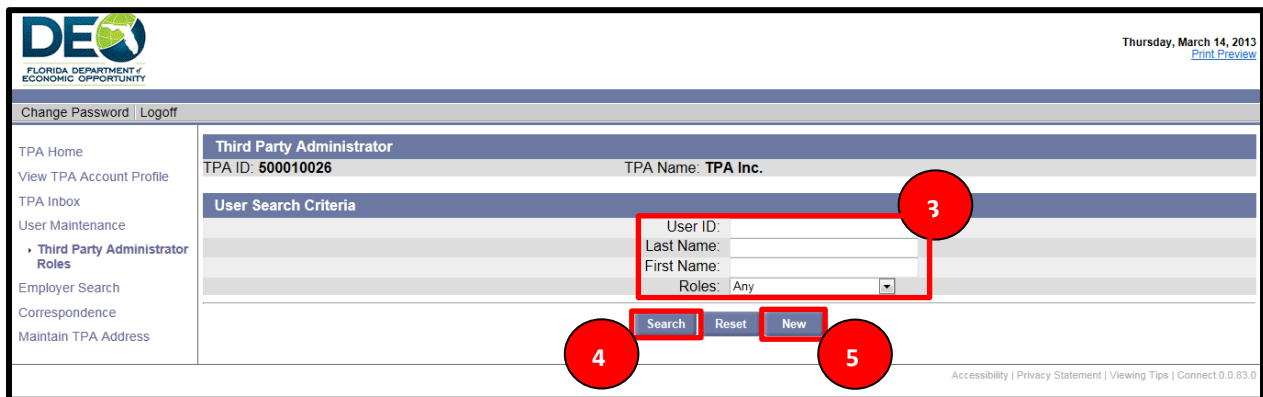
6. Enter the user details, and select 'Save.'
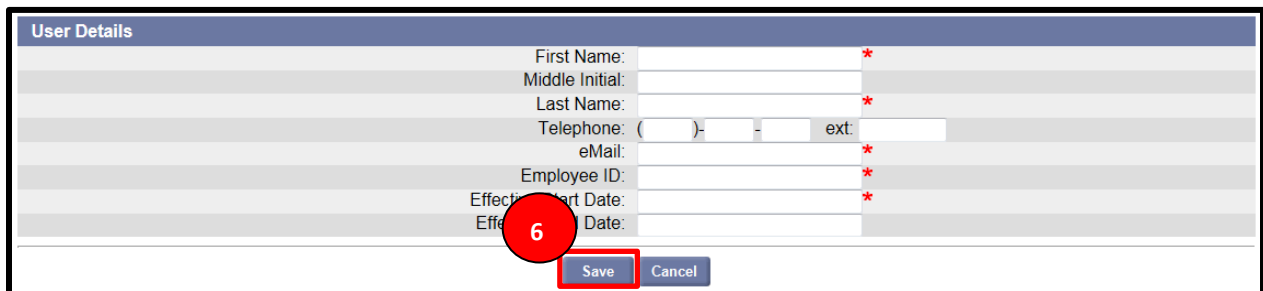
7. The next screen will give you the option to modify the new user's access to the system.
8. Select 'Modify' to update the basic information about the user.
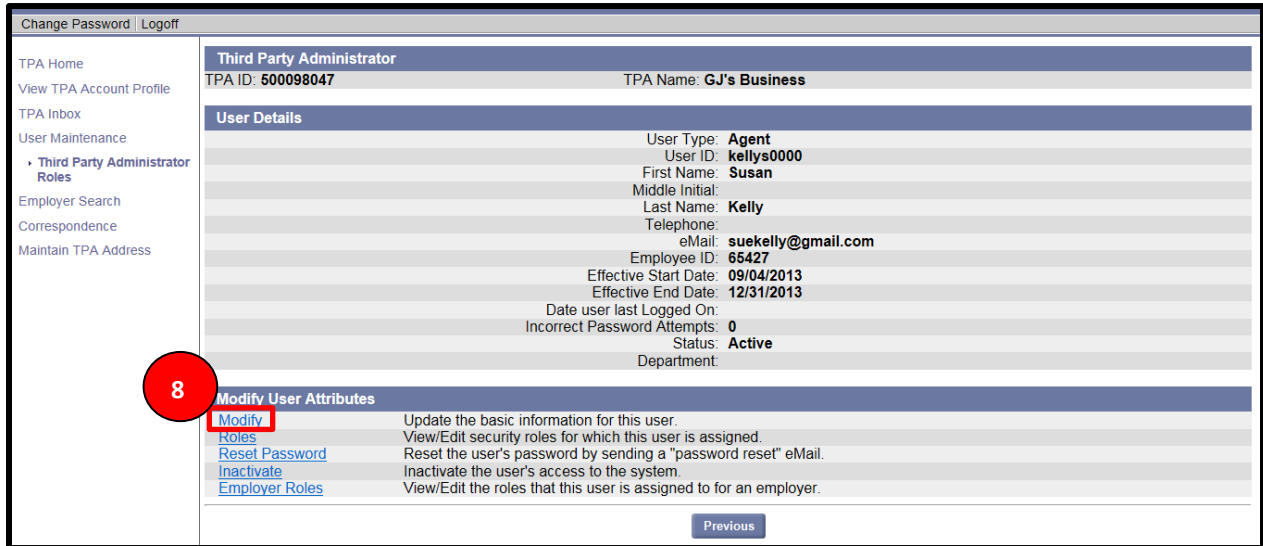
9. On the modify screen, you can update user information and also enter comments or view previous comments.
10. After updating the information, select 'Save' or 'Cancel' to cancel the information and return to the previous screen.
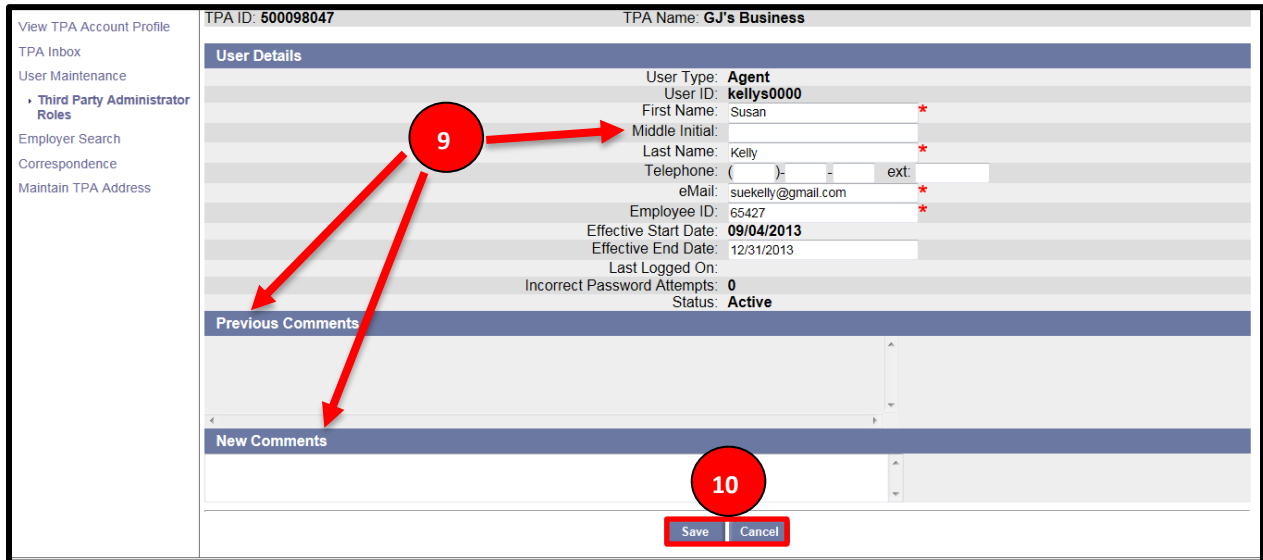
11. Select 'Roles' to view or edit the security roles for the user.
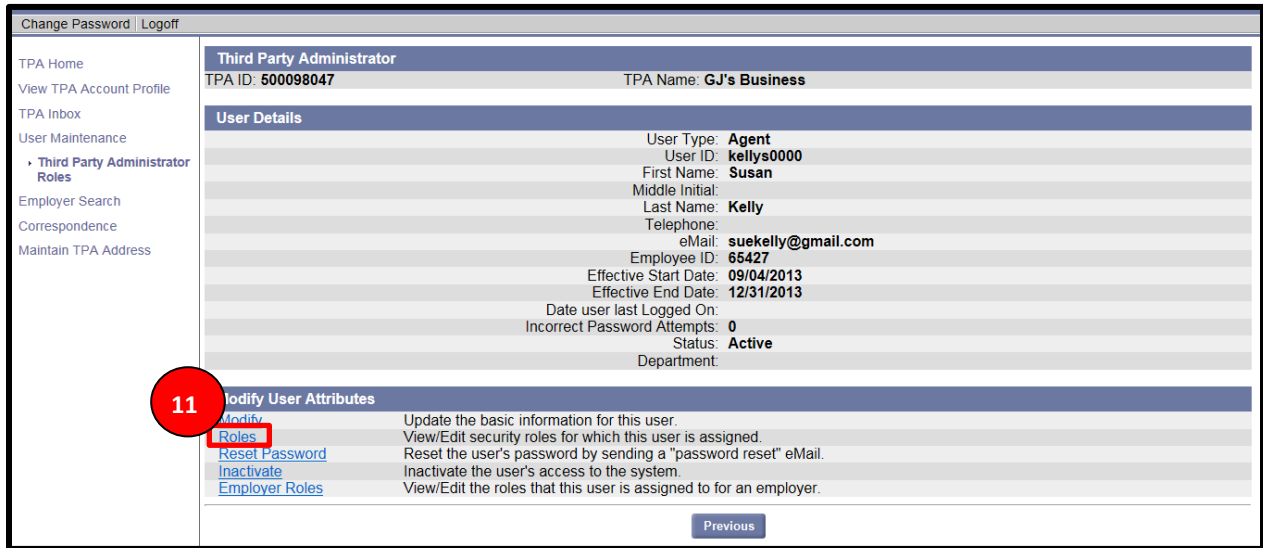
12. As an administrator, you can assign security roles to a user or make a user an administrator.
13. Select the radio button next to the role type.
14. Select 'Save' to save the role type or 'Cancel' to cancel the task and return to the previous screen.
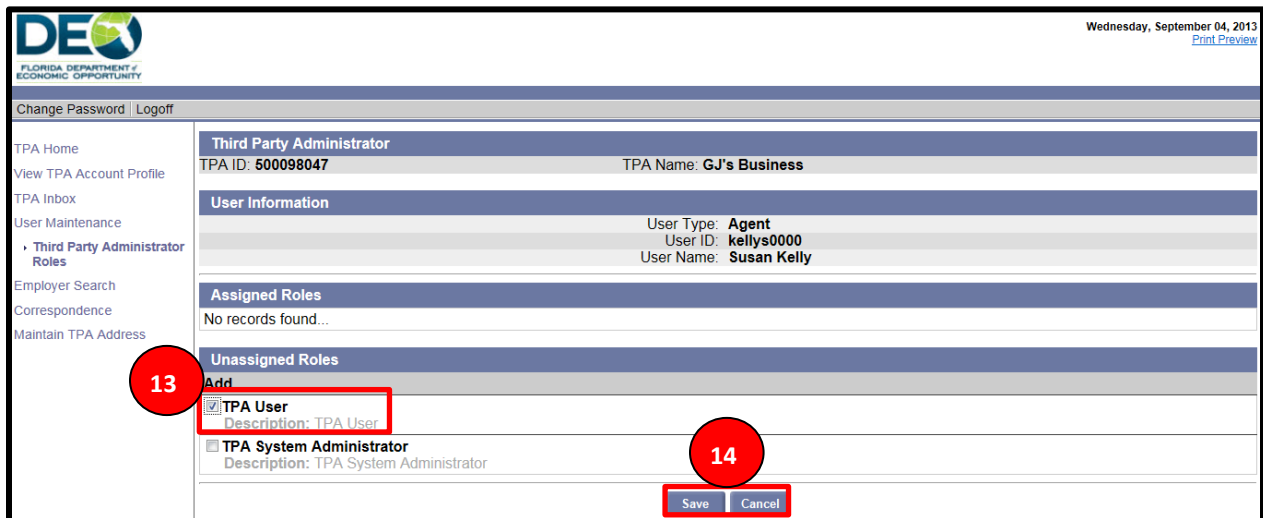
15. Select 'Reset Password' to send a password reset email to a user.

16. On the next screen, you will see a notification that a password reset email will be sent to the user with a link to reset their password – select 'Confirm' to proceed with the password reset action or select 'Cancel' to cancel the action and return to the previous screen.

17. Select 'Inactivate' to inactivate a user.

☞ Please verify that the email address listed on the Reset Password screen is correct before selecting 'Confirm' and sending the secure link.

18. You will see a notification that the user will be inactivated – select 'Confirm' to complete the action, or select 'Cancel' to return to the previous screen.

19. Select 'Employer Roles' to assign employer and role access to a user.

20. Search for the employer by entering one or more of the following:
    a. Employer Name
    b. Employer Account Number
    c. FEIN
21. You may search by role from the Role drop down menu, where you will see all eligible employer roles.

Role:	All	21
Assigned:	All	
	Employer System Administrator	
	TPA User	
Search	TPA System Administrator	
	Account Maintenance Update and Submit	
	Account Maintenance View Only	
	Benefit Charges Protest Submission	
FEI	Benefit Charges View Only	
5905596	Payments Update and Submit	W:
5905596	Payments View Only	R
	Employment and Wage Detail Update and Submit	
5905596	Employment and Wage Detail View Only	ern
5905596	Wage and Separation Mailing	er's
	Benefit Charges View Only	
5905596	Respond to Fact Finding Request	Su
5905596	Respond to Notice of Claim Filed (UCB-412)	
	View Non-monetary Determinations	
5905596	File Appeals on Employer's Behalf	nly
	Respond to Request for Wage Information	
5905596	Manage STC Plans	aim

22. You may search employers from the Assigned drop down menu, where you will have the option to see only Assigned employers, or only Unassigned employers.

Assigned:	All
	All
Search	Assigned Only
	Unassigned Only
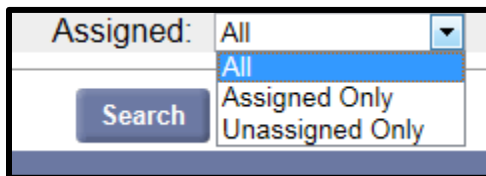
23. Select 'Search' and the results will appear.
24. Select the radio button next to the employer(s) and associated role(s) that you would like to assign to the user.
25. Select 'Save' or select 'Cancel' to return to the previous screen.

2.3.5 Access TPA Correspondence

This section covers the information required to access and view TPA correspondence.

Step-by-Step Instructions

To view all TPA correspondence, follow the below steps:

1. Select 'Correspondence' from the left-hand menu on the TPA Homepage.
2. Leave all data fields blank to view all correspondence, or enter one or more of the following data fields:
   a. Created On Date
   b. Document ID
   c. Employer Account Number
   d. Social Security Number
   e. Last Name
   f. First Name
   g. Subject
3. Select 'Search.'

> Please note that if you choose to search all correspondence by leaving the data fields blank, only 100 correspondence items will populate in the search results.

4. View all correspondence in the 'Search Results' section at the bottom of the page.
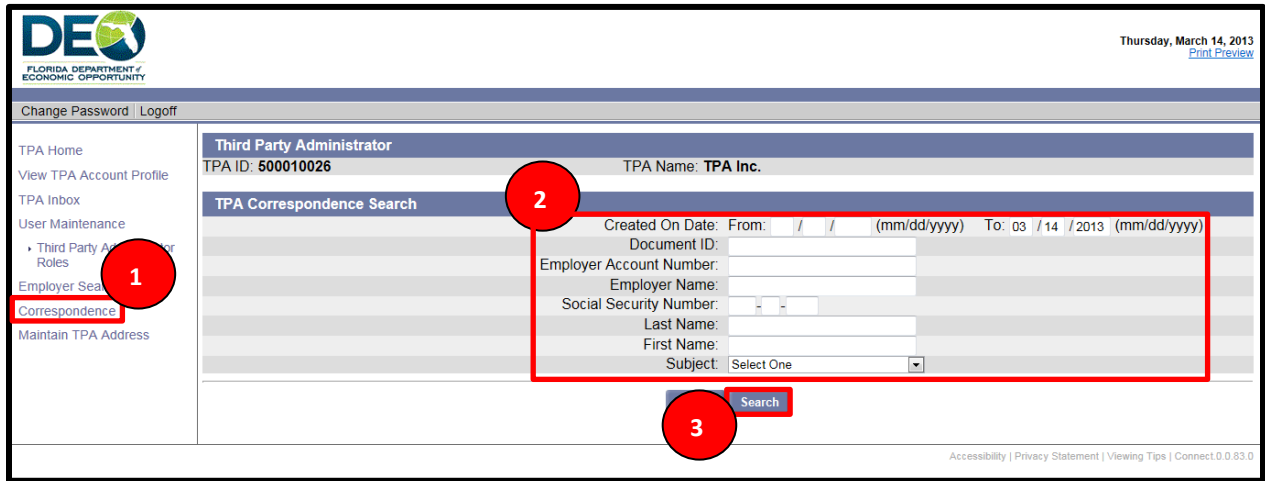
5. To view a specific type of correspondence, select the type from the 'Subject' drop down menu, then select 'Search.'
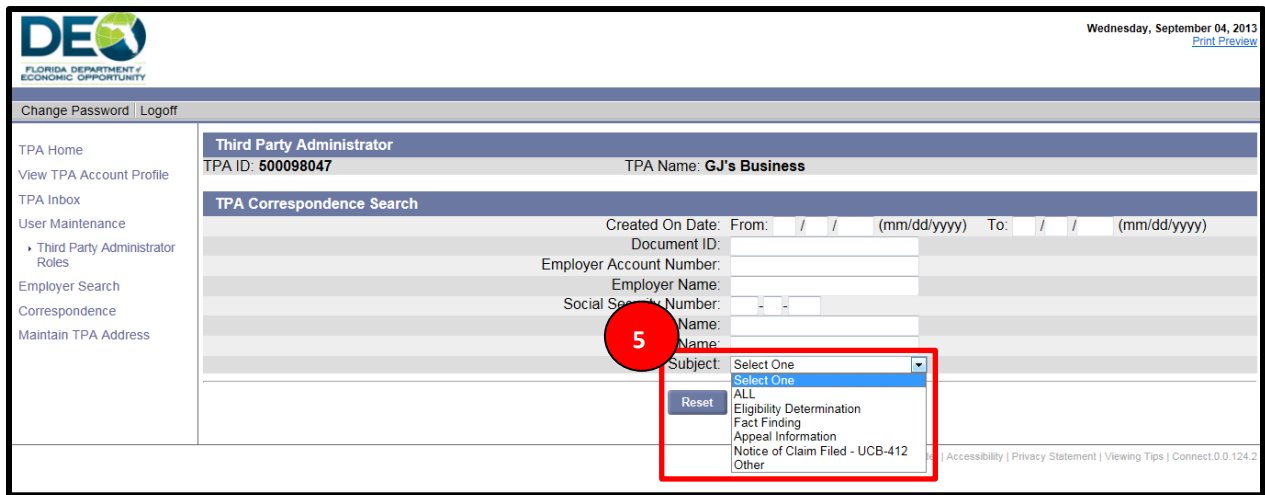
2.4 Manage TPA Action Items

This section covers the Action Items that a TPA may handle in CONNECT, and how to complete action items. It covers the below topics:

- Respond to UCB-412/Notice of Claim Filed
- Respond to Fact Finding
- Protest Benefit Charges

2.4.1 Respond to UCB-412/Notice of Claim Filed

Step-by-Step Instructions

To respond to a UCB-412/Notice of Claim filed, please follow the below steps:

1. Select the EAN or enter the Employer Legal Name.
2. Select the UCB-412/Notice of Claim filed from the 'Subject' drop-down menu.
3. Select 'Search' to view all UCB-412/Notice of Claim Filed.
4. Select the 'Item' hyperlink from the Search Results section.

5. Review the pre-populated information on the next screen.
6. Respond to the questions in the 'Response' section.
   a. Select 'Yes' or 'No' to indicate if claimant worked for you.
   b. Enter period of employment.
   c. Enter earnings.
   d. Enter reason for separation.
   e. Enter any post-employment payments.

You must enter remarks if you indicated that the claimant did not work for the employer.

7. Upload any relevant attachments.
8. Enter contact information.
9. Select 'Submit.'

2.4.2 Respond to Fact Finding

Step-by-Step Instructions

To respond to Fact Finding, follow the steps below:

1. Select 'Fact Finding' from the drop-down menu.
2. Select 'Search.'
3. Select the 'Item' hyperlink from the search results to open the fact-finding questionnaire.

4. Read through information.

5. Complete questions in Section 1.
6. Scroll down to complete questions in Section 2.

7. Complete contact information.
8. Select 'Submit.'

You are encouraged to save your work periodically by selecting the 'Save' button at the bottom of the screen.

2.4.3 Protest Benefit Charges

Step-by-Step Instructions

To protest benefit charges, please follow the below steps:

1. Search for the employer as described in the previous section.
2. Select the employer name hyperlink from the search results.

3. The employer home screen will populate.
4. Select 'Protest Benefit Charges' from the employer home screen.

5. Read through the information.
6. Select 'Protest Benefit Charges.'

7. Enter the Protest Benefit Charge information:
   a. Statement Mail Date.
   b. Claimant SSN.
   c. Claimant Last Name.
   d. Claimant's Last Day of Work.
8. Enter the Reasons for Protest (select all that apply).
9. Provide additional comments.
10. Select 'Submit.'

3. FREQUENTLY ASKED QUESTIONS

This section covers Frequently Asked Questions.

3.1 Common Questions

3.1.1 How do I obtain a copy of information that I entered into CONNECT?

Select 'Print Preview' from the upper right-hand corner of the screen and follow the instructions to print the page.

3.1.2 CONNECT will not allow me to advance to the next screen – how do I fix this?

Likely, you have missed a required field – these fields are marked with a red asterisk, and you will receive an error message at the top of the screen if you left one blank or entered an incorrect response. Double-check your data fields and re-submit or select 'Next' to move on.

3.2 Other Questions

For other questions, please see the FAQ section of the DEO Web site at
http://www.floridajobs.org/frequently-asked-questions-directory