



New Mexico Department of Workforce Solution (NMDWS)

Assign a Third Party Administrator Guide

uFacts Instructions

Assign a Third Party Administrator Guide

A new self-service account has been created for existing businesses that are currently registered with the New Mexico Department of Workforce Solutions (NMDWS). Existing employers should have received a letter from NMDWS listing their User ID and password, and they must activate their account before they can login to the new Unemployment Insurance Tax System to assign a third party agent.

The UI Tax System self-service portal can be accessed from www.dws.state.nm.us/dws-uitax.html.

If you are having trouble with this link, you can access the NMDWS UI Tax webpage from the NMDWS homepage at www.dws.state.nm.us under the “Business Section.”

To access your employer account, you will need your User ID and password. If you do not know your User ID or password contact us at uitax.support@state.nm.us or dws.statusunit@state.nm.us You will need to provide your existing six (6) digit Employers Account Number, FEIN, employer name and address.

To authorize a Third Party Administrator (TPA) to act on your behalf you must have their nine (9) digit TPA ID. If you do not know their nine (9) digit TPA ID, contract your TPA to obtain.

Assign a Third Party Administrator Guide

Create a New Agent Relationship

Login to Unemployment Insurance Tax System

The screenshot shows a web browser window with the URL 'MSN.com'. The page title is 'New Mexico Department of Workforce Solutions'. The date is 'Wednesday, June 22, 2011'. The page is titled 'Logon' and includes a navigation menu on the left with links: 'Employer Registration', 'System Availability', 'User Guide', 'Returning Employer', and 'Account Activation'. The main content area is titled 'New Mexico Department of Workforce Solutions : Employer Login' and contains the following text: 'To access Employer account information, enter your User ID and Password. For purposes of authentication, using your Password is considered the same as using your signature.' Below this text are two input fields: 'User ID:' and 'Password:', both marked with a red asterisk to indicate they are required. There are 'Login' and 'Forgot Password' buttons below the input fields. A red warning message states: 'Your account will be locked after 4 attempts. If you are having problems logging in, select the "Forgot Password" button to reset your password.' Below the warning is a 'Helpful Resources Home' section with four links: 'Employer Registration' (Create a new employer account to obtain an Employer Account Number and create System Administrator user.), 'System Availability' (Check routine and special system downtimes), 'User Guide' (A guide to using the Employer Self-Service System.), and 'Returning Employer' (Complete a Pending Registration using the Temporary User ID and Password.). There is also a link for 'Account Activation' (Activate legacy system account to conduct business on-line.). The footer contains 'Accessibility | Privacy Statement | Viewing Tips'.

From the employer home page select the 'Account Maintenance' link

The screenshot shows the 'Employer Home' page. The page title is 'New Mexico Department of Workforce Solutions'. The date is 'Wednesday, June 22, 2011'. The page is titled 'Change Password | Logoff'. The main content area is titled 'Employer Information' and contains the following text: 'Employer Account Number: 00280446' and 'Employer Name: John's DBA Name: JOHN'S GARAGE'. Below this is an 'Employer Home' section with links: 'Employer Home' and 'Employer Home'. There are four sections of links: 'FAQ' (Review frequently asked questions (FAQ's) for the UI program or UI system.), 'Account Maintenance' (Maintain account information including changing legal name, mailing address, owners/officers, reporting units, or reporting status. View the most recent Tax Rate Notice, authorize TPAs or provide information regarding the purchase or sale of a business.), 'Benefit Charge Activities' (Available in the spring of 2012), 'Correspondence' (Available in the spring of 2012), 'Employment and Wage Detail Reporting' (Submit Employment and Wage Detail Reports for this Agency and the Department of Revenue. View historical Employment and Wage Reporting information.), 'Payment Information' (Available in the spring of 2012), and 'User Maintenance' (Assign or Update user access to Employer account information.). The footer contains 'Accessibility | Privacy Statement | Viewing Tips'.

Assign a Third Party Administrator Guide

Select the Third Party Administrator (TPA) Authorization Link

The screenshot shows the UT Online portal interface. The top navigation bar includes 'Change Password' and 'Logoff'. The left sidebar contains a menu with 'Employer Home', 'FAQ', 'Account Maintenance', 'Benefit Charge Activities', 'Correspondence', 'Employment and Wage Detail Reporting', 'Payment Information', and 'User Maintenance'. The 'Account Maintenance' section is expanded, showing links for 'View Employer Account Profile', 'Address Information', 'Maintain Employer Name', 'Maintain Owners/Officers', 'Reporting Units', and 'Third Party Administrator (TPA) Authorization'. The main content area displays 'Employer Information' with 'Employer Account Number: 00280446' and 'Employer Name: John's DBA Name: JOHN'S GARAGE'. Below this, there are sections for 'Account Maintenance', 'View Employer Account Profile', 'Address Information', 'Maintain Employer Name', 'Maintain Owners/Officers', and 'Third Party Administrator (TPA) Authorization'. The 'Third Party Administrator (TPA) Authorization' link is highlighted in blue.

From this page, you can create a new TPA relationship or manage existing TPA's. To add a Third Party Administrator (TPA), select 'New.'

The screenshot shows the 'Third Party Administrator (TPA) Authorization' section of the UT Online portal. The left sidebar is the same as in the previous screenshot, but the 'Third Party Administrator (TPA) Authorization' link is now selected and highlighted. The main content area displays the 'Third Party Administrator (TPA) Authorization' section with the following text: 'Using either the TPA Name or TPA ID you may search for an existing Third Party Administrator that was previously assigned to your account. To see all TPAs associated with your account select 'Search' without entering any search criteria.' Below this text are input fields for 'TPA Name', 'TPA ID', and 'Role' (set to 'All'). There are 'Search' and 'Reset' buttons. Below the input fields, there is a link for 'Role Definitions' and a note: 'Select 'New' to assign a new TPA to your account. In order to assign a new TPA to your account, you must have their TPA ID (contact your TPA to get this information).' At the bottom of the section are 'Home' and 'New' buttons.

Assign a Third Party Administrator Guide

Enter the 'TPA ID' and select 'Next.'

UT Online

New Mexico Department of WORKFORCE SOLUTIONS

Wednesday, June 22, 2011 [Print](#)

Change Password | [Logoff](#) * Indicates Required Field

[Employer Home](#)

FAQ

Account Maintenance

- View Employer Account Profile
- Address Information
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Third Party Administrator (TPA) Authorization**

Benefit Charge Activities

Correspondence

Employment and Wage Detail Reporting

Payment Information

User Maintenance

Employer Information

Employer Account Number: **00280446** Employer Name: **John's**
DBA Name: **JOHN'S GARAGE**

Assign Third Party Administrator (TPA)

In order to authorize a Third Party Administrator (TPA) for your account you must have their TPA ID (contact your TPA to obtain this information). To begin the TPA authorization process, enter the TPA ID in the field below and select 'Next'.

TPA ID*:

[Previous](#) [Next](#)

Assign a Third Party Administrator Guide

The TPA information page is displayed with no roles assigned to the TPA.

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization, if an end date is known. If you choose not to enter an end date, the TPA will be authorized to perform services on your account until an end date is entered.

TPA Services Begin Date (mm/dd/yyyy)

TPA Services End Date (mm/dd/yyyy)

Using the check boxes in the 'Add' column, assign the TPA to the roles(s) you would like the TPA to perform.

Select 'Save'

The screenshot shows the 'Assign a Third Party Administrator' page in the Workforce Solutions uFacts system. The page is divided into several sections:

- Employer Information:** Employer Name: John's, DBA Name: JOHN'S GARAGE, Employer Account Number: 00280446.
- Third Party Administrator (TPA) Information:** TPA ID: 2000027, TPA Name: Payroll Inc.
- TPA Details:** Fields for TPA Services Begin Date (7/1/2011) and TPA Services End Date.
- Assigned Roles:** A section with instructions on how to assign and remove roles to individual reporting units. It states: "The System will, as default, assign a TPA role to all reporting units unless you change the reporting units assigned to each role." Below this is a table with columns 'Add' and 'Role'.
- Un-assigned Roles:** A section with instructions on how to assign roles to a selected TPA.

Add	Role
<input type="checkbox"/>	Account Maintenance Update and Submit*
<input type="checkbox"/>	Account Maintenance View Only
<input type="checkbox"/>	Benefit Charges Protest Submission*
<input type="checkbox"/>	Benefit Charges View Only
<input type="checkbox"/>	Payments Update and Submit*
<input type="checkbox"/>	Payments View Only
<input type="checkbox"/>	Employment and Wage Detail Update and Submit*
<input type="checkbox"/>	Employment and Wage Detail View Only
<input type="checkbox"/>	Claims Forms Mailing*

If an employer has more than one reporting unit, they can assign TPA roles to individual reporting units. The system will, as a default, assign a TPA role to all reporting units unless you change reporting units assigned to each role.

Assign a Third Party Administrator Guide

Select the 'Assigned Units' link in the 'Modify' column in the 'Assigned Roles' section to open the window where you can assign roles by business reporting unit.

Employer Information
Employer Account Number: 00280446
Employer Name: John's
DBA Name: JOHN'S GARAGE

Third Party Administrator (TPA) Information
To assign and un-assign TPA roles or to remove the TPA from your account select the 'Modify' button.
TPA ID: 2000027
TPA Name: Payroll Inc
Attention: Jane Doe
Address Line 1: 123 Main St
Address Line 2:
City: Albuquerque
State: New Mexico
ZIP/Postal Code: 87001
Country: US
TPA Service Begin Date: 7/1/2011
TPA Service End Date:

Assigned Roles
To assign and un-assign TPA roles to individual reporting units select the 'Assigned Units' link in the Modify column. This will open the window where you can assign roles by business unit.
The system will, as default, assign a TPA role to all individual reporting units unless you change the roles assigned to each unit.

Role	Reporting Unit Number	Reporting Unit Name	Modify
Employment and Wage Detail Update and Submit	No units are assigned		Assigned Units
Payments Update and Submit	No units are assigned		

Check the 'Add' box to select the 'Reporting Unit' assignment.

Select 'Save.'

Employer Information
Employer Account Number: 00280446
Employer Name: John's
DBA Name: JOHN'S GARAGE

Third Party Administrator (TPA) Information
TPA ID: 2000027
TPA Name: Payroll Inc

Assigned Role
Employment and Wage Detail Update and Submit

In order to add or remove a reporting unit assignment, please select the appropriate checkbox, then select 'Save'. If you do not select 'Save', or select 'Previous', changes to role assignments will be lost.

Assigned Employer Reporting Units Unassign All
No records found...

Un-assigned Employer Reporting Units Assign All

Add	Reporting Unit Number	Name
<input type="checkbox"/>	0001	JOHN'S GARAGE, TAOS

Assign a Third Party Administrator Guide

Manage an Existing Relationship

Select the 'Third Party Administrator (TPA) Authorization' link from the employer 'Account Maintenance' page.

To view existing relationships select the 'Search' button. The system will provide a list of all TPA's associated with your account. You can narrow your search by entering in specific search criteria.

Enter in the 'TPA ID' you are searching for and select 'Search.'

The screenshot shows a web browser window with the URL <http://www.dws.state.nm.u...> and the page title "uFacts Online". The page is dated "Wednesday, June 29, 2011". The main content area is titled "Employer Information" and displays the following details:

Employer Account Number: 00280446	Employer Name: John's
	DBA Name: JOHN'S GARAGE

Below this is the "Third Party Administrator (TPA) Authorization" section. It contains the following text:

Using either the TPA Name or TPA ID you may search for an existing Third Party Administrator that was previously assigned to your account. To see all TPAs associated with your account select 'Search' without entering any search criteria.

The search form includes:

- TPA Name:
- TPA ID:
- Role:

Buttons for "Search" and "Reset" are located below the form. Below the search form, there is a link for "Role Definitions" and instructions: "Select 'New' to assign a new TPA to your account. In order to assign a new TPA to your account, you must have their TPA ID (contact your TPA to get this information)." Buttons for "Home" and "New" are located at the bottom of the section.

The left sidebar contains a navigation menu with the following items:

- Employer Home
- FAQ
- Account Maintenance
 - View Employer Account Profile
 - Address Information
 - Maintain Employer Name
 - Maintain Owners/Officers
 - Maintain Employer Reporting Units
 - Third Party Administrator (TPA) Authorization**
- Benefit Charge Activities
- Correspondence
- Employment and Wage Detail Reporting
- Payment Information
- User Maintenance

Assign a Third Party Administrator Guide

The search results are displayed in the 'Results' section of the page. To access the TPA information, select the corresponding 'TPA ID' link.

The screenshot shows the New Mexico Department of Workforce Solutions uFacts portal. The page title is "New Mexico Department of Workforce Solutions". The date is "Wednesday, June 29, 2011". The user is logged in as "UT Online".

The main content area is divided into two sections: "Employer Information" and "Third Party Administrator (TPA) Authorization".

Employer Information:

- Employer Account Number: 00280446
- Employer Name: John's
- DBA Name: JOHN'S GARAGE

Third Party Administrator (TPA) Authorization:

Using either the TPA Name or TPA ID you may search for an existing Third Party Administrator that was previously assigned to your account. To see all TPAs associated with your account select 'Search' without entering any search criteria.

Search criteria:

- TPA Name:
- TPA ID: 2000027
- Role: All

Buttons: Search, Reset

Results:

To update a TPA's role or to remove a TPA from your account, select the TPA from the list below.

TPA ID	TPA Name	TPA Services Begin Date	TPA Services End Date	Role(s)
2000027	Payroll Inc	7/1/2011		Employment and Wage Detail Update and Submit

Select Link for [Role Definitions](#)[®]

Select 'New' to assign a new TPA to your account. In order to assign a new TPA to your account, you must have their TPA ID (contact your TPA to get this information).

Buttons: Home, New

Footer: Accessibility | Privacy Statement | Viewing Tips

Assign a Third Party Administrator Guide

Select 'Modify' in the 'Third Party Administrator (TPA) Information' section.

The screenshot shows the 'Workforce Solutions' web application interface. The browser window title is 'NM Department of Workforc... UT Online'. The page header includes the logo and the date 'Friday, July 01, 2011'. The navigation menu on the left includes options like 'Employer Home', 'FAQ', 'Account Maintenance', and 'Third Party Administrator (TPA) Authorization'. The main content area is divided into three sections:

- Employer Information:** Displays 'Employer Account Number: 00280446' and 'Employer Name: John's DBA Name: JOHN'S GARAGE'.
- Third Party Administrator (TPA) Information:** Contains a 'Modify' button and a list of TPA details:
 - TPA ID: 2000027
 - TPA Name: Payroll Inc
 - Attention: Jane Doe
 - Address Line 1: 123 Main St
 - Address Line 2:
 - City: Albuquerque
 - State: New Mexico
 - ZIP/Postal Code: 87001
 - Country: US
 - TPA Service Begin Date: 7/1/2011
 - TPA Service End Date:
- Assigned Roles:** Contains a 'Previous' button and a table with the following data:

Role	Reporting Unit Number	Reporting Unit Name	Modify
Employment and Wage Detail Update and Submit	No units are assigned		Assigned Units

Assign a Third Party Administrator Guide

Modify Roles as needed.

Change Password | Logoff * Indicates Required Field

Employer Information
Employer Account Number: 00280446 Employer Name: John's
DBA Name: JOHN'S GARAGE

Third Party Administrator (TPA) Information
TPA ID: 2000027 TPA Name: Payroll Inc

TPA Details
Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.
Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the role(s) would like them to perform.
TPA Services Begin Date: 7/1/2011* (mm/dd/yyyy)
TPA Services End Date: (mm/dd/yyyy)

Assigned Roles
To assign and remove TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business reporting unit.
The System will, as default, assign a TPA role to all reporting units unless you change the reporting units assigned to each role.
Click the checkbox in the 'Remove' column to un-assign this role to the selected TPA.

Remove	Role	Modify
<input type="checkbox"/>	Employment and Wage Detail Update and Submit*	Assigned Units

Un-assigned Roles
Select the checkbox in the Add column to assign this role to the selected TPA, then press 'Save'. If you press 'Previous', or do not press 'Save' after checking your selection, role assignment selections will be lost.
Note that all Roles not assigned to TPAs can only be performed by the employer.

Add	Role
<input type="checkbox"/>	Account Maintenance Update and Submit*
<input type="checkbox"/>	Account Maintenance View Only
<input type="checkbox"/>	Benefit Charges Protest Submission*
<input type="checkbox"/>	Benefit Charges View Only
<input type="checkbox"/>	Payments Update and Submit*
<input type="checkbox"/>	Payments View Only
<input type="checkbox"/>	Employment and Wage Detail View Only
<input type="checkbox"/>	Claims Forms Mailing*

Select 'Save.'

Assign a Third Party Administrator Guide

Modify Reporting Units as needed.

Select 'Save.'

The screenshot shows the 'Assign a Third Party Administrator' page in the uFacts system. The page is titled 'Assign a Third Party Administrator' and includes a navigation menu on the left with options like 'Employer Home', 'FAQ', 'Account Maintenance', 'View Employer Account Profile', 'Address Information', 'Maintain Employer Name', 'Maintain Owners/Officers', 'Maintain Employer Reporting Units', 'Third Party Administrator (TPA) Authorization', 'Benefit Change Activities', 'Correspondence', 'Employment and Wage Detail Reporting', 'Payment Information', and 'User Maintenance'. The main content area is divided into several sections: 'Employer Information' (Employer Account Number: 00280446, Employer Name: John's, DBA Name: JOHN'S GARAGE), 'Third Party Administrator (TPA) Information' (TPA ID: 2000027, TPA Name: Payroll Inc), 'Assigned Role' (Employment and Wage Detail Update and Submit), and 'Assigned Employer Reporting Units' (No records found...). Below this is a table for 'Un-assigned Employer Reporting Units' with columns for 'Add', 'Reporting Unit Number', and 'Name'. The table contains one entry: a checkbox, '0001', and 'JOHN'S GARAGE, TAOS'. At the bottom of the page are 'Previous', 'Save', and 'Next' buttons.

Add	Reporting Unit Number	Name
<input type="checkbox"/>	0001	JOHN'S GARAGE, TAOS

If an employer has more than one reporting unit, they can assign TPA roles to individual reporting units. The system will, as a default, assign a TPA role to all reporting units unless you change reporting units assigned to each role.

Assign a Third Party Administrator Guide

Agent Account Maintenance Roles

The ability to establish a relationship and assign roles to a TPA is now available. The TPA Account Maintenance roles will be effective immediately. Other roles will become effective with the second phase of our new self-service system currently scheduled for implementation in March 2012.

The following is a synopsis of the functionality associated with each role:

'Account Maintenance Update and Submit' role provides the following account maintenance related functions (this functionality became available in March 2011):

- Employer Address Maintenance
- TPA Role Maintenance
- Suspend/Terminate/Reactivate Account (available in April 2012)
- Owner/Officer Information Maintenance
- Reporting Units Maintenance
- View Employer Account History
- Employer Name Maintenance

'Account Maintenance View Only' roles allows authorized individuals access to view the following types of data:

- Employer Address
- TPA Role Assignment
- Account Status (active, suspended, terminated)
- Owner/Officer Information
- Reporting Unit Information
- Account History Information
- Employer Name Information

'Benefit Charges Protest Submission' role provides the following benefit charge-related functions:

- Receive quarterly statement of benefit charges
- Protest charges assessed against the account of both contributory and reimbursing Employers
- Receive annual rate notice

'Benefit Charges View Only' role provides the following benefit charge related functions:

- View Benefit Charge Detail Information

Assign a Third Party Administrator Guide

'Claims Forms Mailing' role provides the following benefit and claim-related functions:

- Receive notice of claim filing
- Receive request for separation information
- Submit response to request for separation information online

'Payments Update and Submit' role provides the following payment related functions::

- Schedule electronic tax payments for both contributory and reimbursable employers
- Submit electronic tax payments for both contributory and reimbursable employers
- Print a payment voucher to submit with a paper check payment
- Calculate voluntary contributions
- Request a refund of overpaid contributions.

'Payments View Only' role provides the following payment related functions:

- View payment details

'Submit Employment and Wage Detail Update and Submit' role provides the following Employment and Wage Detail-related functions:

- Submit Employer Employment and Wage Details (original reports)
- Submit Employer Employment and Wage Detail Adjustments

'Submit Employment and Wage Detail View Only' role provides the following employment and wage detail related functions:

- View Employer Employment and Wage Submission Details