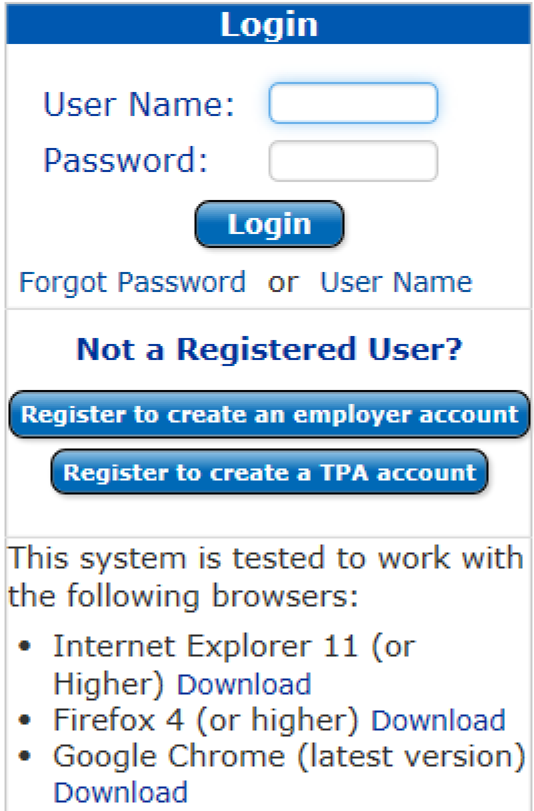
NHUIS

AN EMPLOYER'S GUIDE TO USING THE BENEFITS SYSTEM.

This system is available on line. To sign in or sign up please go to https://nhuis.nh.gov/employer/



BACKGROUND

Welcome to the **IMPROVED** Employer Home Page! The Employer Home page allows you, the employer and the Third Party Adminstrator (TPA), to see your important notices right up front with a quick glimpse of pending items and charges that have been accrued since your last monthly statement. The Adminstrator now has the ability to set preferences on how department requests are sent, via US Mail or electronically with an email alert. You can now respond to E-Response and Employer Wage Intake documents as well as manage WorKShare plans with a single sign-on. There is also easy access to WebTax and New Hire reporting.

The objective of this booklet is to provide you with some instructions on how to navigate through these new screens and functions. We have also installed an on-line Help Text. Should you still need further assistance, please contact the department.

System Problems: Please call 603-223-6100

General questions: email NHES_Employer.Assist@NHES.NH.GOV

WorkShare: email NHES_WorkShare@NHES.NH.GOV

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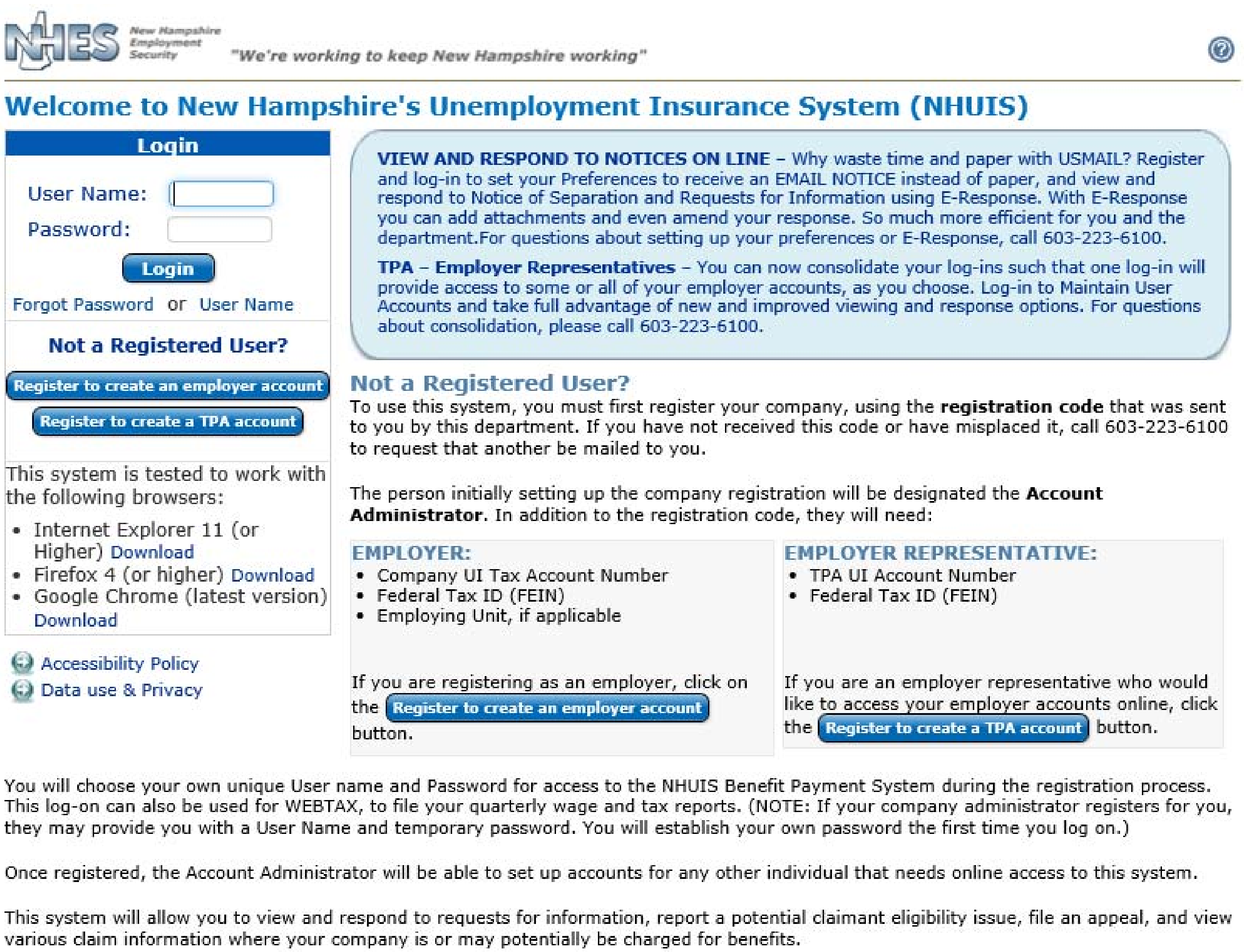
LOG-IN PAGE

Welcome to the Login Page. This page provides some basic information about NHUIS and is used to register, log-in and access your employer or TPA account. Even if you choose to continue receiving correspondence via US Mail, you can access your account here. Protecting your NH Employment UI Account is one of our top priorities; this is a secure way to manage activity and notices regarding claims for unemployment benefits.

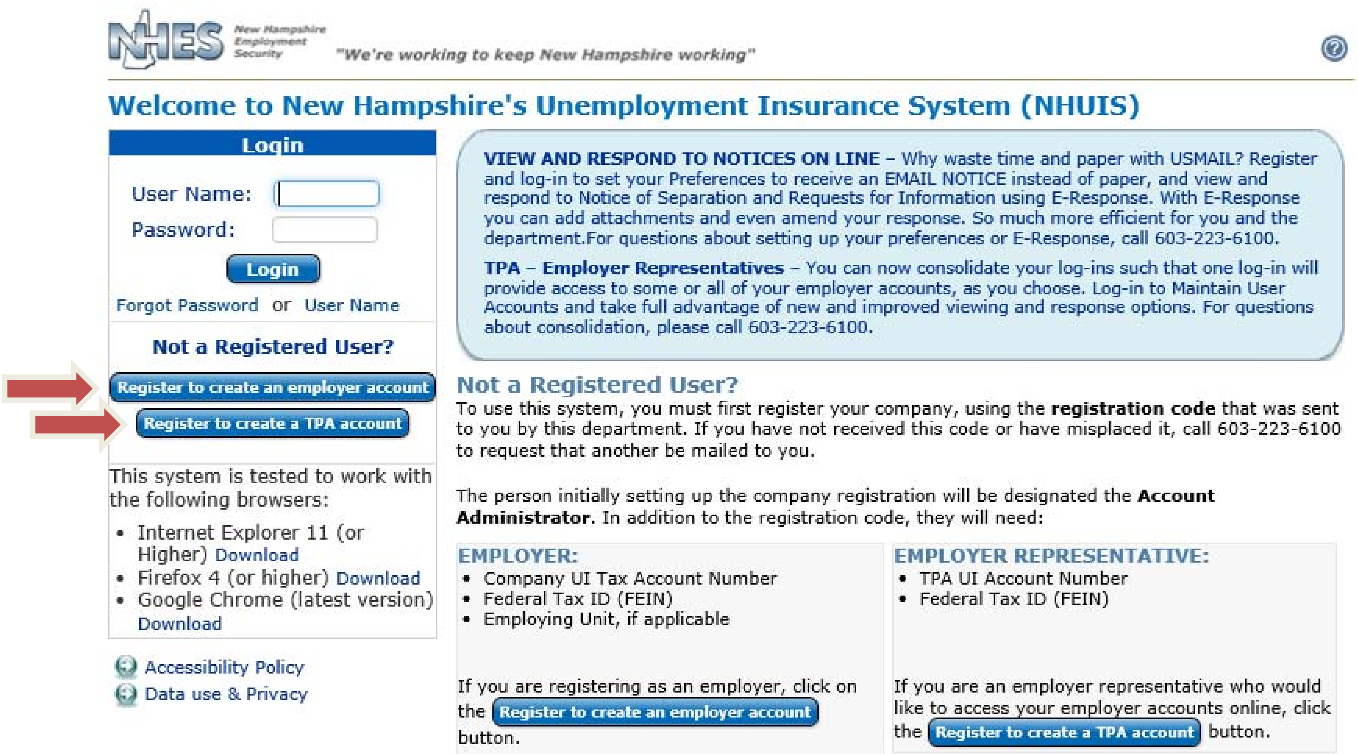
- If your company has never registered to use NHUIS, please follow the steps on page 5 of this booklet to establish an account Administrator.
- If your company has an existing Administrator, please contact them to log-in and create a General User or Administrator User Name and temporary Password for you.
- If your company's only Administrator is no longer employed, please contact the department for assistance to deactivate the account so that you may establish a new Administrator.
- If you are already registered but cannot remember your Password or your User Name, please refer to pages 8 and 9 for instructions.



Registering and Creating an Administrator for the first time

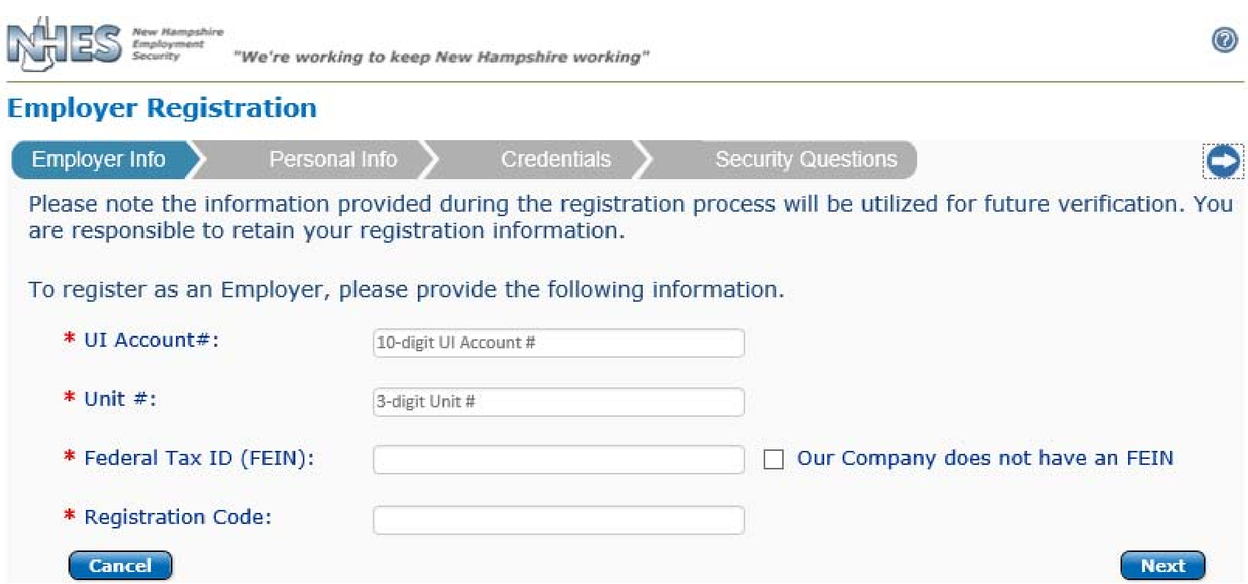
The employer registration is a 4-step process that allows the department to gather contact and authentication information. These 4-steps are for your security. Please do not share your User Name or Password.

Choose the appropriate button - Register to create an employer account or Register to create a TPA account.



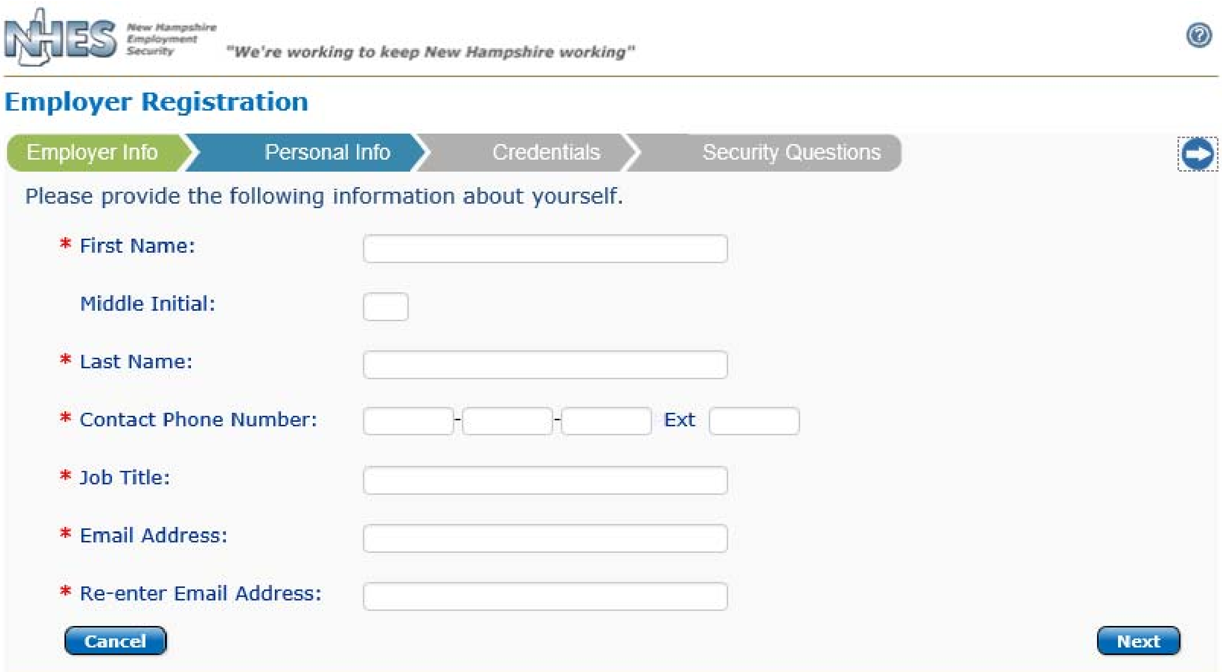
Step 1: Company or TPA specific information

The Unit # will default to 000 if your account does not have documented Units. The Registration Code is supplied by NHES. If you do not have a Registration Code, please contact the department at NHES_Employer.Assist@NHES.NH.GOV or 603-223-6100. Once completed, the Next button or Forward Arrow icon can be used to move to the next page.



Step 2: Contact information

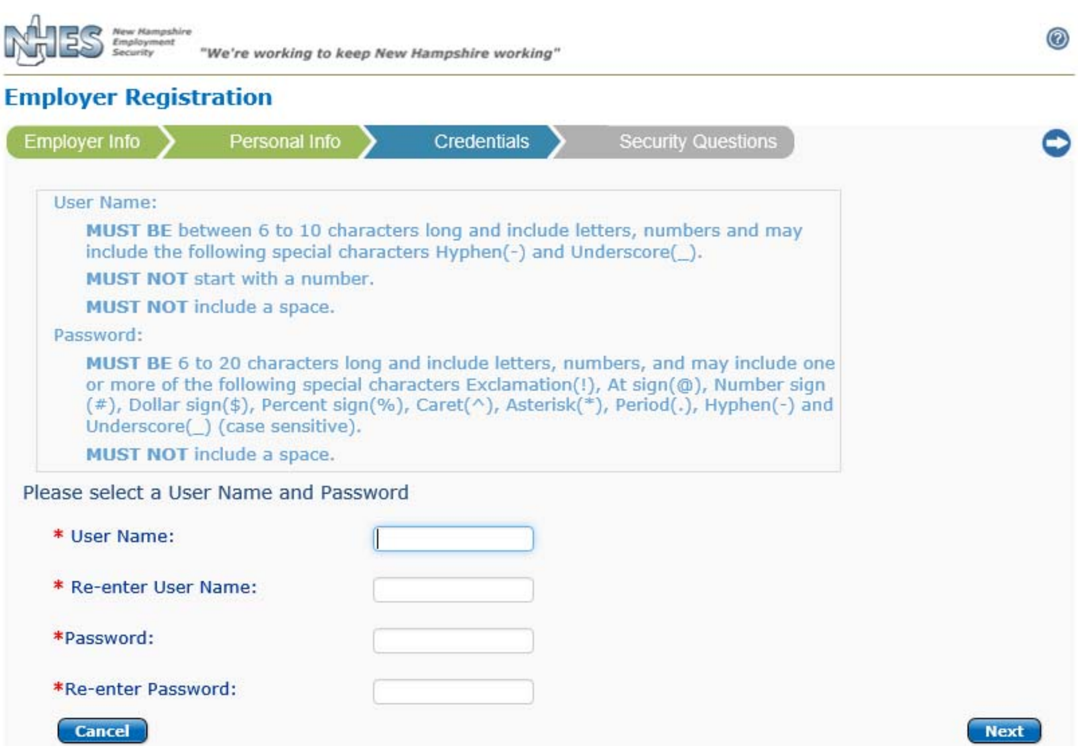
Once completed, the Next button or Forward Arrow icon can be used to move to the next page.



Step 3: Create a User Name and Password

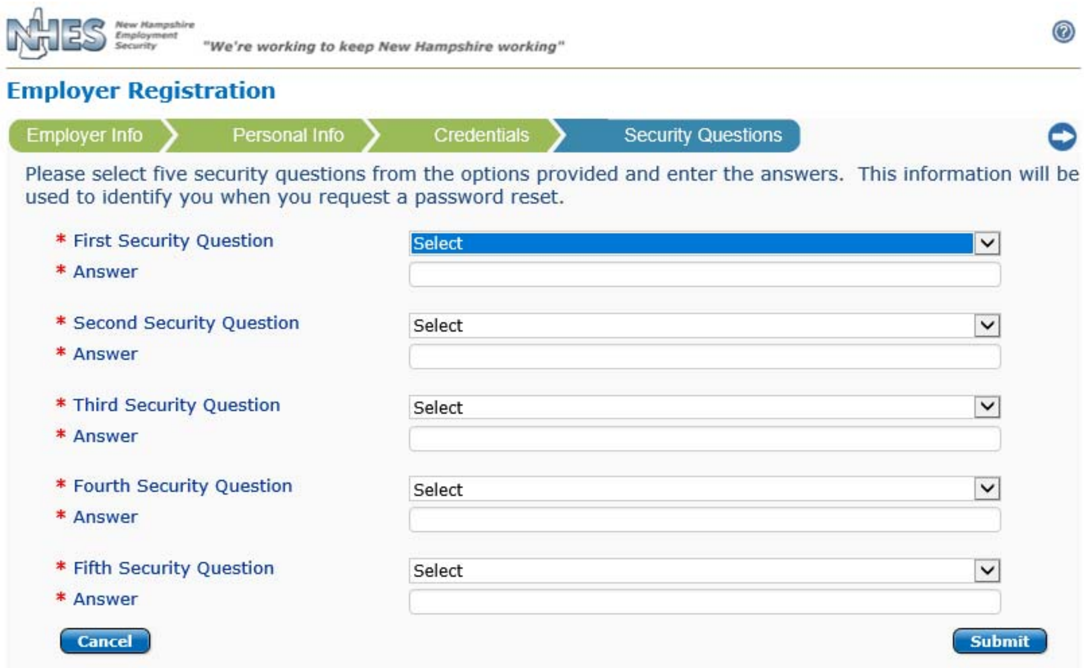
This section allows you to create a User Name and Password that is unique to you. Once completed, the Next button or Forward Arrow icon can be used to move to the next page.

NOTE: If the User Name already exists in our system, you will receive a validation to choose a different name.



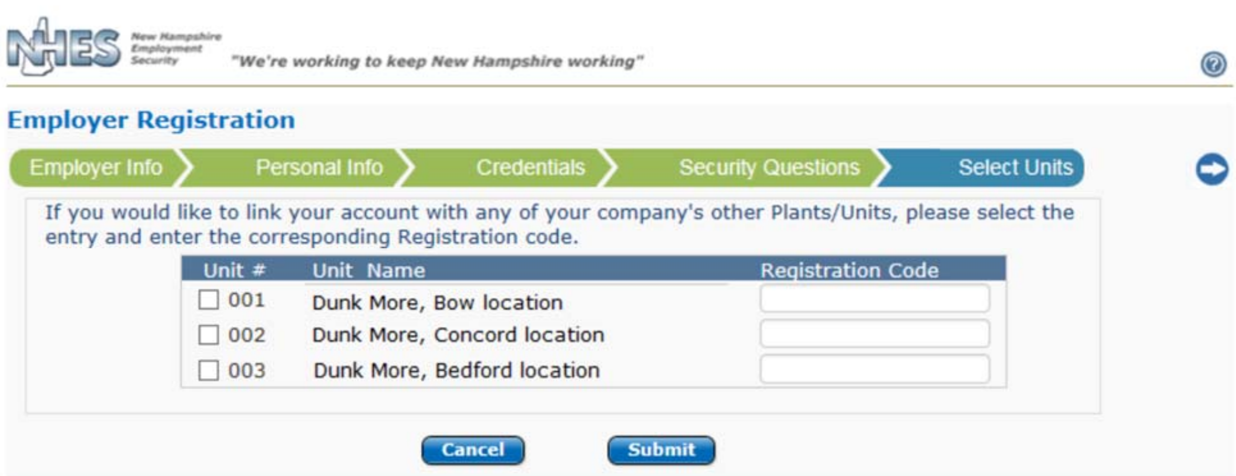
Step 4: Set Security Questions

You will be required to choose and provide responses to five (5) different security questions. These responses are used for authentication and security purposes. Once completed, the Next button or Forward Arrow icon can be used to move to the next page.



<u>Same Account Number with Multiple Units?</u>

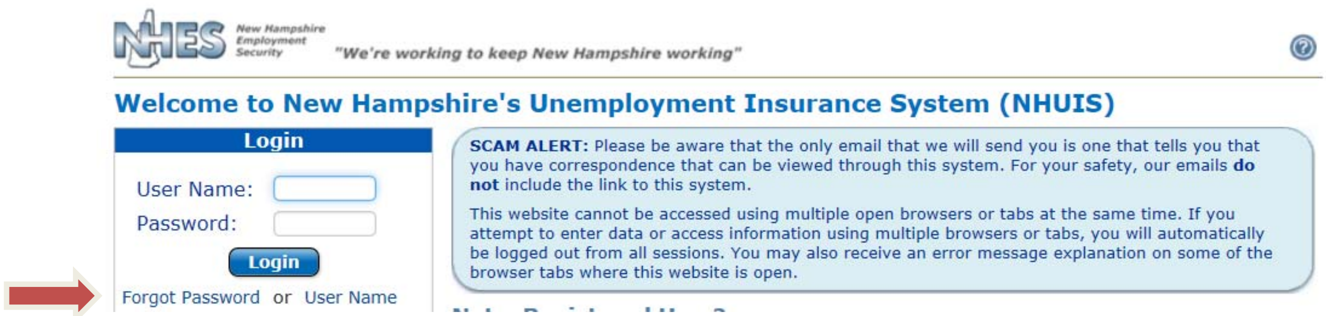
If your account has multiple units associated to your UI account number, you can register each account with a different Administrator using the individual Registration Codes provided by NHES, and/or connect one or more units to the same User Name. You will only be presented with this screen if your company has multiple unit locations documented with NHES. If one or more units has an established Administrator, "Already Registered" will be displayed. Once completed, click Submit.



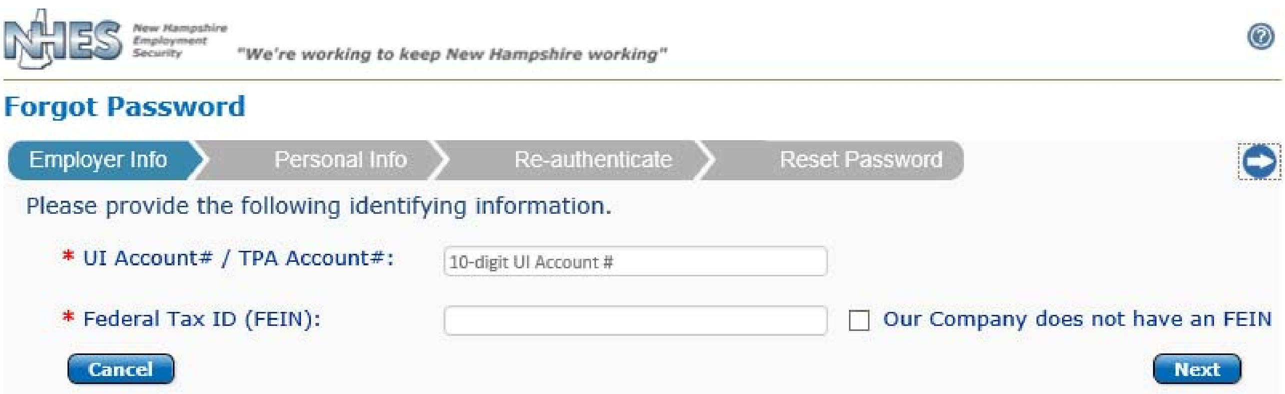
Once you have completed the registration process, you will be able to sign in anytime to view and respond to notices about claims filed that involve your company or review charges accrued.

Cannot Remember your Credentials?

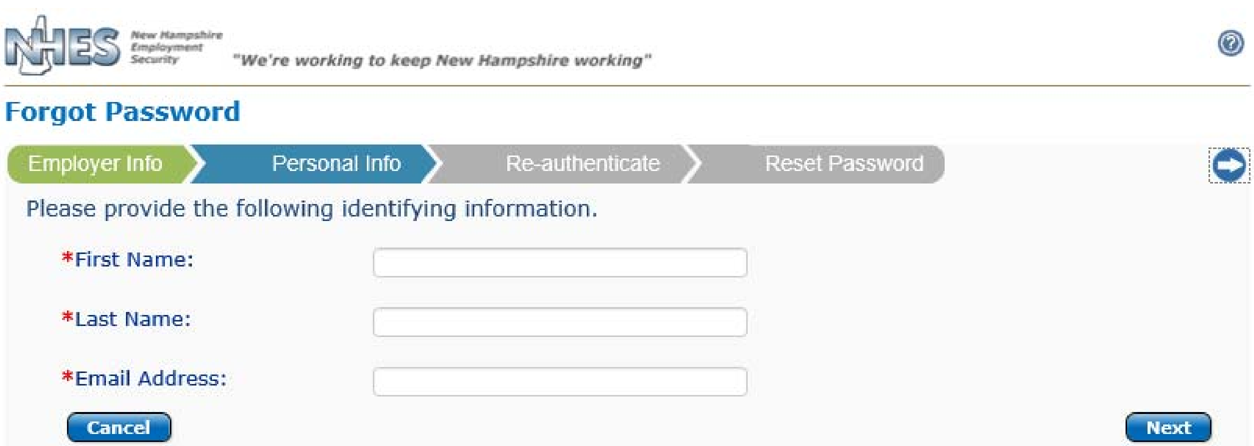
Password Assistance:



If you cannot remember your Password but can remember your User name, simply enter your User Name and click “Forgot Password”. Enter your company specific information and click “Next” or the Forward Arrow icon.



You must enter the information in the Personal Info section exactly as you originally provided to the department when you registered or last updated it. If you need assistance, please contact the department. Choose “Next” or the Forward Arrow icon to move forward. Once this screen has passed authentication, you will be randomly presented with 3 of the 5 security questions you previously established. If answered correctly, you will be presented with a temporary password. After logging in with the temporary password, you will be required to choose a new password.



NOTE: The temporary password is only good for the day it is issued.

Creating a New Password:

When you need to create a new password, the system will require specific characters be a part of the password. Below is a picture of the helpful hints that can be found on the create a password page in the system.

Password:

MUST BE 6 to 20 characters long and include letters, numbers, and may include one or more of the following special characters Exclamation(!), At sign(@), Number sign(#), Dollar sign($), Percent sign(%), Caret(^), Asterisk(*), Period(.), Hyphen(-) and Underscore(_) (case sensitive).

MUST NOT include a space.

For Security Reasons:

Passwords will expire every 90 days and will need to changed. To change your password, click on the "Forgot Password" link and follow the prompts.

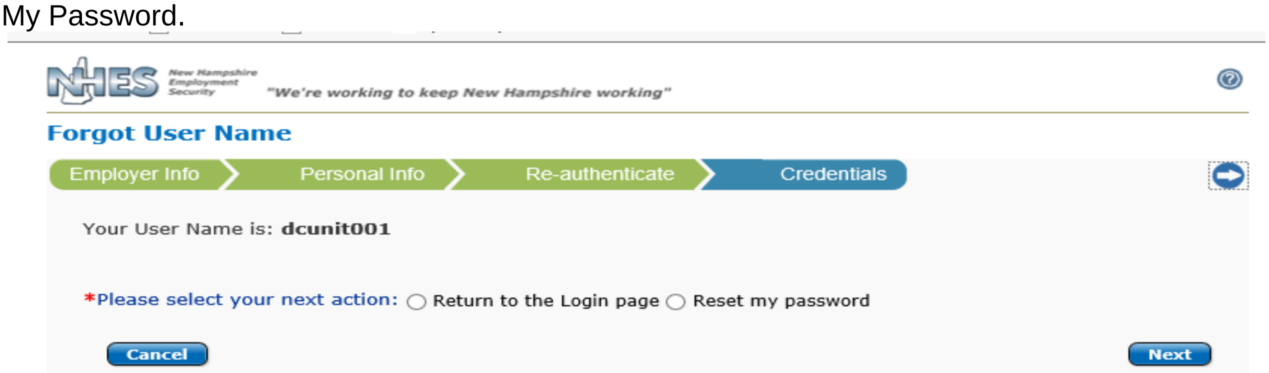
Passwords expire every 90 days.
3 failed attempts will lock out the sign-on
and require call to 603-223-6100 to reset password.

User Name Assistance:

If you cannot remember your User Name, simply click on "User Name". Enter your company specific information and click "Next" or the Forward Arrow icon.

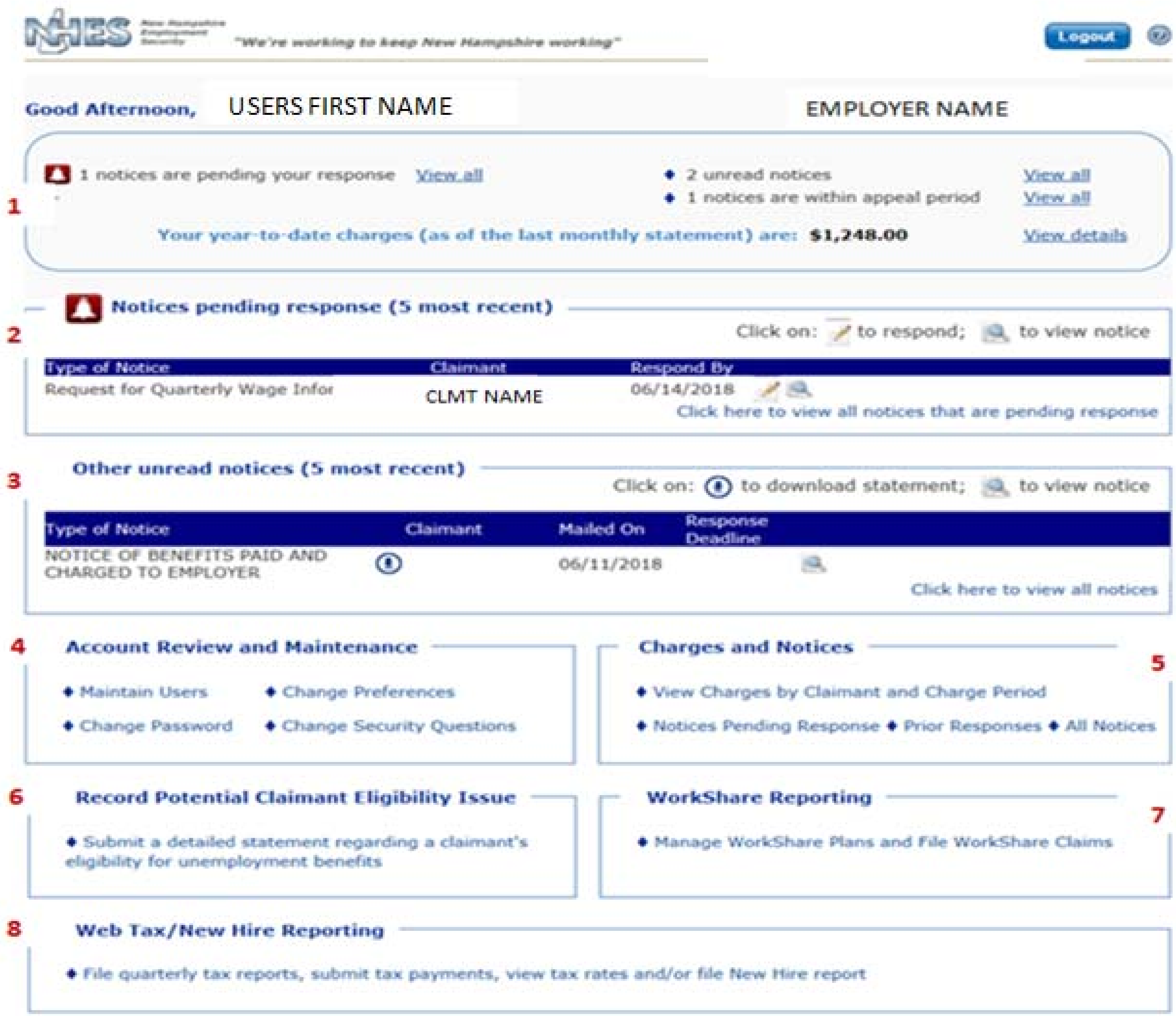
SEE **Password Assistance** instruction on previous page – the initial steps for retrieving your User Name are the same as resetting your Password. You will need to enter your NH UI Account # or TPA Account # and Federal FEIN, then your Personal Information, and then answer 3 of your 5 established Security Questions.

If authenticated, you will be presented with your User Name and the choice to Return to the Login Page or also Reset My Password.



Home Page

Welcome to the NEW Home Page (aka Main Menu). It has many new features and things have been moved around based on feedback we have received. This booklet will breakdown each section by the numbered sections below.



Sections 1, 2, and 3 are a quick glimpse of pending and unread correspondences as well as year-to-date charges as of the last monthly statement.

Section 4 allows the Administrator to maintain all User accounts and change the employer's preference of how they would like to receive documents from the department.

Section 5 provides an opportunity to view more details about charges or credits to your account and access all notices – read or unread, pending or completed, archived or not.

Section 6 allows you to report potential eligibility issues to the department regarding a specific individual that may be filing for benefits.

Section 7 is allows you to submit a new WorkShare Plan or maintain an existing Plan.

Section 8 allows you to connect to WebTax and report quarterly taxes and new hires.

Reviewing Charges

There are 4 different options available for viewing charges and credits to your account. Choose View Details link in Section 1 or View Charges by Claimant and Charge Period link in Section 5 to access the page with the 4 option links.

View Year-to-Date Charge Summary by Month

To review the charge statement, click on View Monthly Statement link for the appropriate Month to be presented with a PDF of the statement. Only the current year statements are offered on this page.

View Monthly Charge Statements

You will be presented with the ALL NOTICES page, sorted by Notice Type: Monthly Charge Statements, where you can access any Monthly Statement for which there exists a charge or credit to your account. See page 21 of this booklet for details about using the All Notices page.

View Charge Details by Claimant Benefit Year

Enter the specific claimant's SSN and click List Benefit Years button. Choose the Benefit Year you would like to view charges for (if more than one year is offered). Click View Charges button and details will be presented.


"We're working to keep New Hampshire working"

Logout

Charge Details by Claimant Benefit Year   Employer: EMPLOYER NAME   User: USER NAME

Charges for Employer: UI Account #:

Lookup Claimant Benefit Year

*Step1. Enter Claimant's SSN: List Benefit Years

*Step2. Select Benefit Year End Date:

View Charges

Claimant: Jane Doe   Claim Effective Date: 5/14/2017   Weekly Benefit Amount: $427.00

Total Potential Charges: $ 5,551.00   Total Charges to-date: $827.00

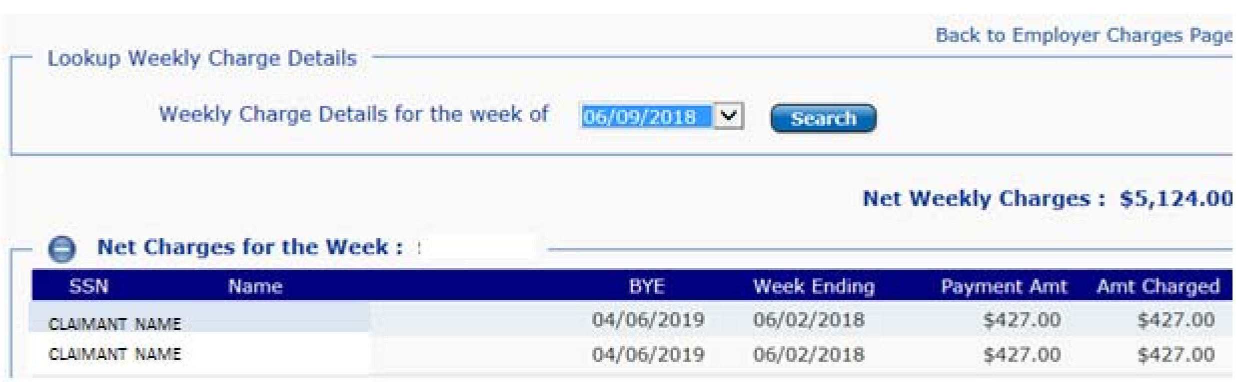
Weekly Payment and Charge History

Week Ending Date	Status	Date Paid	Gross Amount Payable	Amount Paid	Amount Charged	Amount Credited	Net Amount Charged
05/20/2017	Denied		$0.00	$0.00	$0.00	$0.00	$0.00
05/27/2017	Denied		$0.00	$0.00	$0.00	$0.00	$0.00
06/03/2017	Denied		$0.00	$0.00	$0.00	$0.00	$0.00
10/04/2017	Waiting Week		$0.00	$0.00	$0.00	$0.00	$0.00
10/21/2017	Paid	10/26/2017	$427.00	$427.00	$427.00	$0.00	$427.00
10/28/2017	Paid	11/03/2017	$427.00	$400.00	$400.00	$0.00	$400.00
11/04/2017	Denies/Overpaid	11/13/2017	$427.00	$427.00	$427.00	$427.00	$0.00

Done

View Charge Details by Week (for the current month only)

The dropdown will be defaulted to the last completed calendar week of the current month. Only weeks that have not yet been included on a Monthly Charge Statement will be presented.


Back to Employer Charges Page

Lookup Weekly Charge Details

Weekly Charge Details for the week of 06/09/2018   Search

Net Weekly Charges : $5,124.00

Net Charges for the Week :

SSN	Name	BYE	Week Ending	Payment Amt	Amt Charged
CLAIMANT NAME		04/06/2019	06/02/2018	$427.00	$427.00
CLAIMANT NAME		04/06/2019	06/02/2018	$427.00	$427.00

Notices – Correspondence from this Department

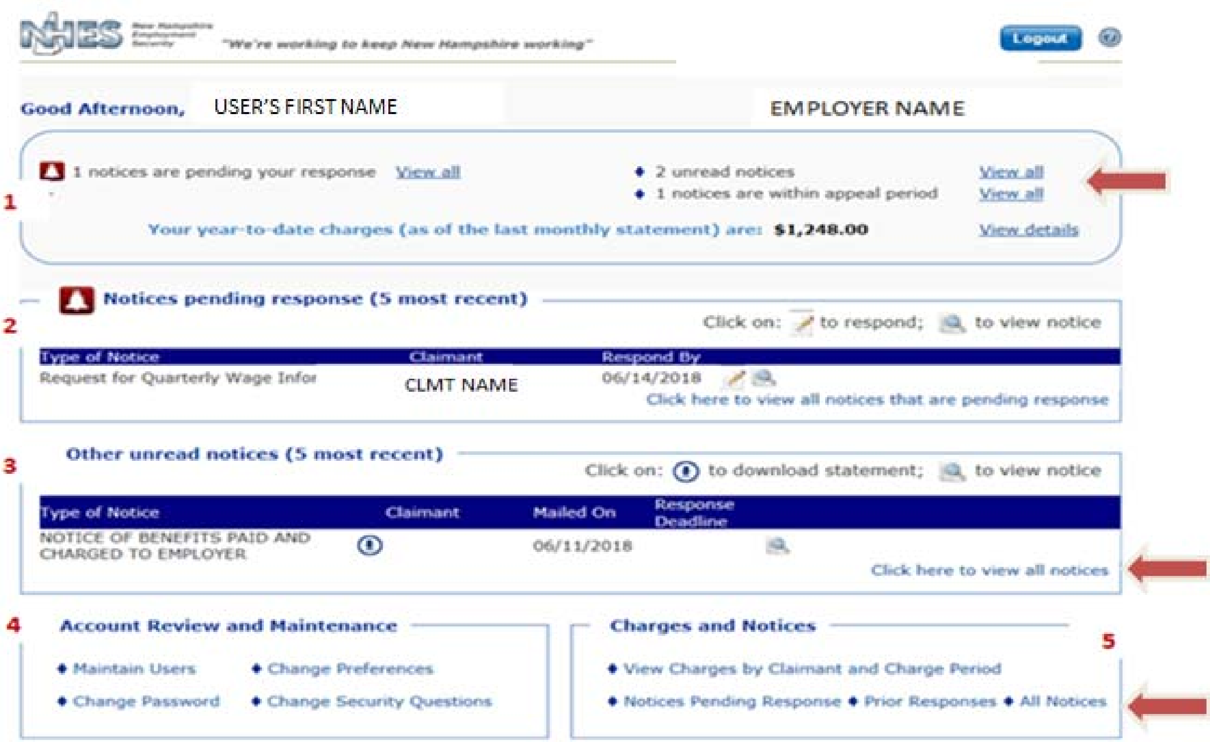
The Home Page offers a high-level summary of notices that might require your attention as well as links to respond to pending notices and access all read or unread, pending or completed correspondence, whether archived or active.

Pending notices in Sections 1 and 2 are those which require a response and have a deadline attached. In Section 2, you can respond to the notice using the pencil icon next to the Respond By date. You can view the document using the magnifying glass icon. **NOTE:** Pending notices are time sensitive and require a prompt response to allow the department to properly determine benefit eligibility and charging. Once the deadline has passed, these documents are no longer available as Pending. See next page for details about responding to various notices.

Unread notices in Section 1 are those other than Pending.

Notices within appeal period in Section 1 are Determinations of Eligibility or Appeal Decisions for which the appeal deadline has not passed.

Access the detailed All Notices page for a list of documents and access to view or respond to them by using the various "View" links in Sections 1, 3 or 5. See page 21 of this booklet for additional details about the All Notices page.



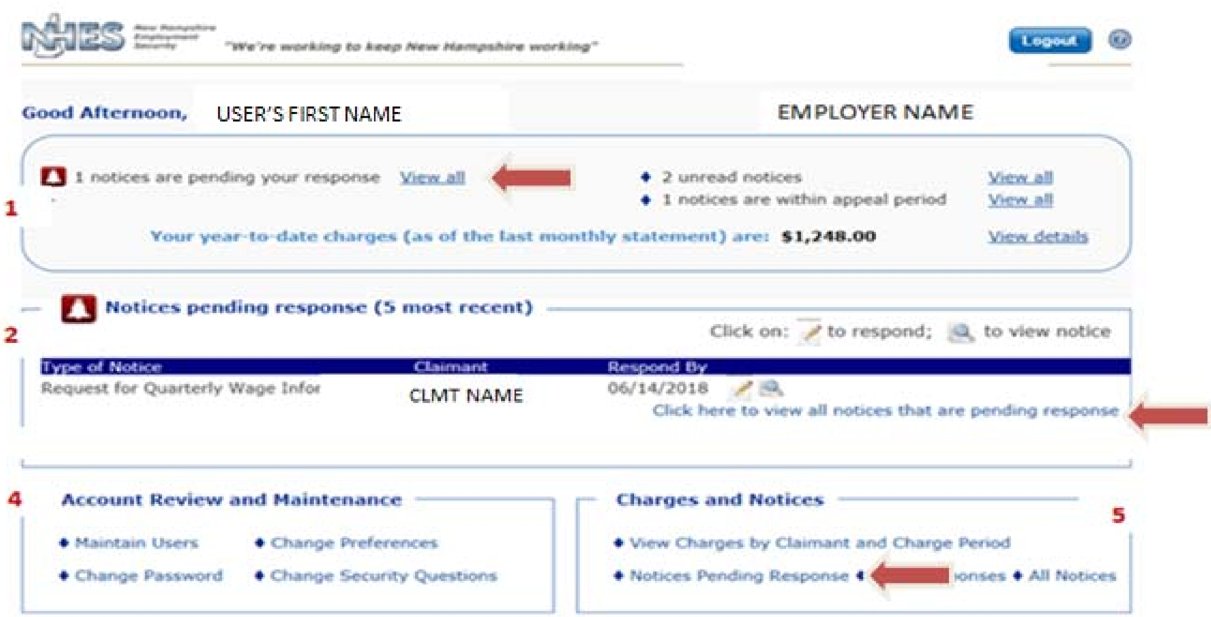
Responding to Pending Notices

Depending on the type of request you are responding to, you will be presented with various screens. You can also access all notices pending a response by using the “View” links in Section 1, 2 or 5.

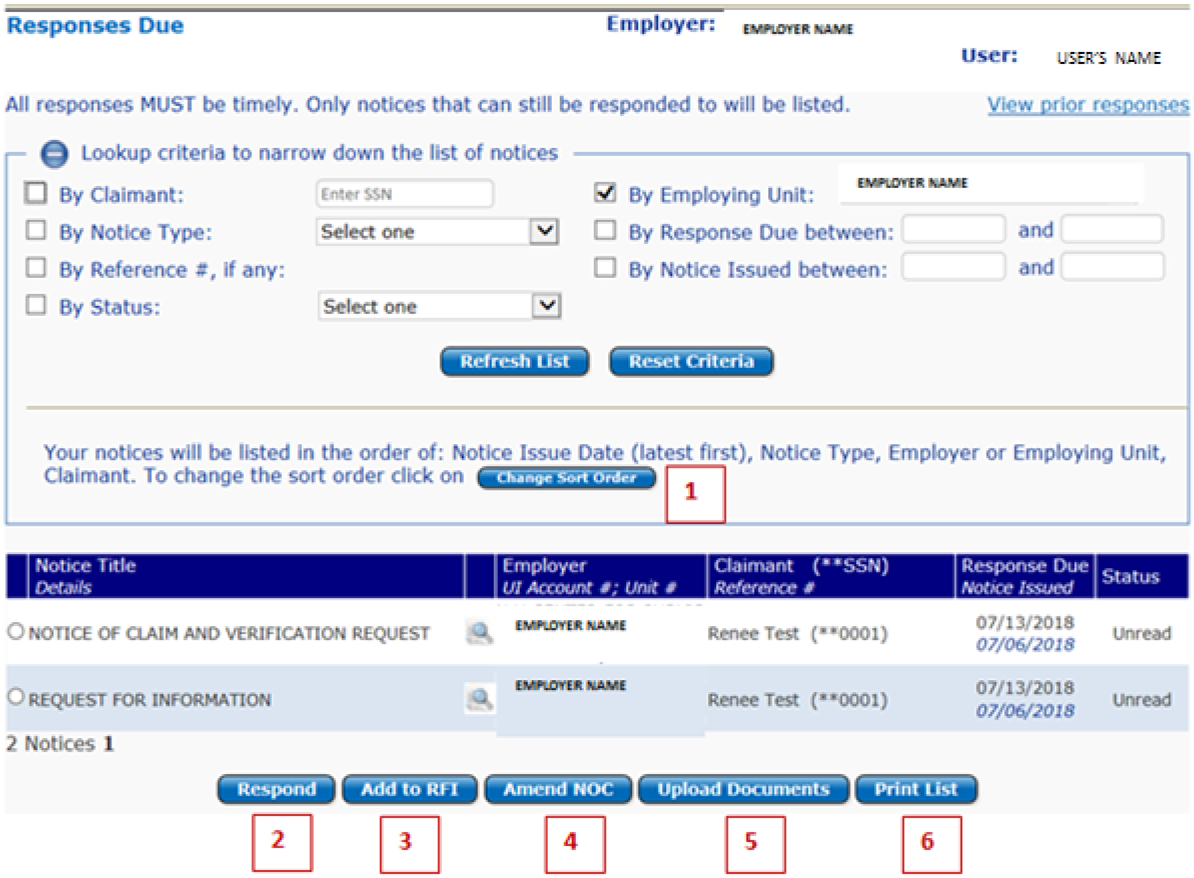
If you utilize the pencil icon on the Home Page, you will be taken directly to input screens.

If you utilize the “View” links, you will be presented with the Responses Due page, where a list is presented and you can choose to view the PDF (using the magnifying glass icon), respond to the notice, add or amend information for certain notices, and upload PDF documents to the department. (See details of using Responses Due page on the next page of this booklet.)

If you choose to respond to the notice from the Responses Due page, you will be presented with the same input screens as you would have using the pencil icon on the Home Page.

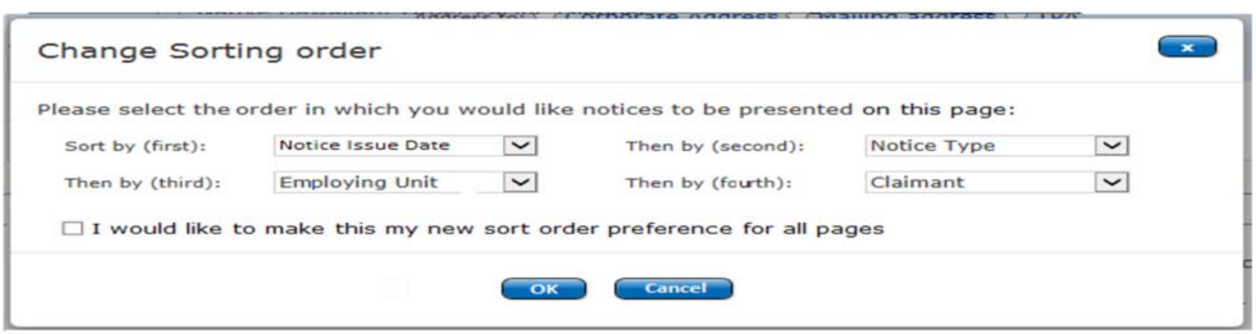


Responses Due Page



1. **Change Sort Order Pop-Up**

   If you would like to change the sort order of this page based on display, simply click on the Change Sort Order Button and complete the follow screen. Once you have completed this process, click "OK".



2. **Respond**

   To respond to the request, radio button the document that you want to complete and click Respond button. You will be taken to the input screen(s) specific to the request.

3. **Add to RFI (Request for Information)**

   If you have already responded to a RFI document, you can add more information as long as the deadline has not passed. If the deadline has passed and you would like to review what you have submitted, you can go to View Prior Responses or All Notices to search for the specific notice.

4. Amend NOC (Notice of Claim & Verification Request)

If you have already responded to an NOC via E-Response and the deadline has not passed, you can amend the document if you need to change anything that you previously provided.

NOTE: You can only amend an NOC that was submitted via E-Response. If you are not currently responding via E-Response, please go to the Change Preferences link on your Home Page and select the radio button for "I would like to use E-Response" under the Corporate Preferences for Response to Request for Separation Information section at the bottom of the page.

Please contact the department for additional questions or assistance.

5. Upload Documents

When responding to any of the documents listed on the Responses Due page, you can also upload documents to support your response. NHUIS only accepts PDF documents. Example of things to upload:

- Check Stubs, Payroll Records or Time Cards
- Company Policies, Warnings, Reports

See page 20 of this booklet for details on uploading documents.

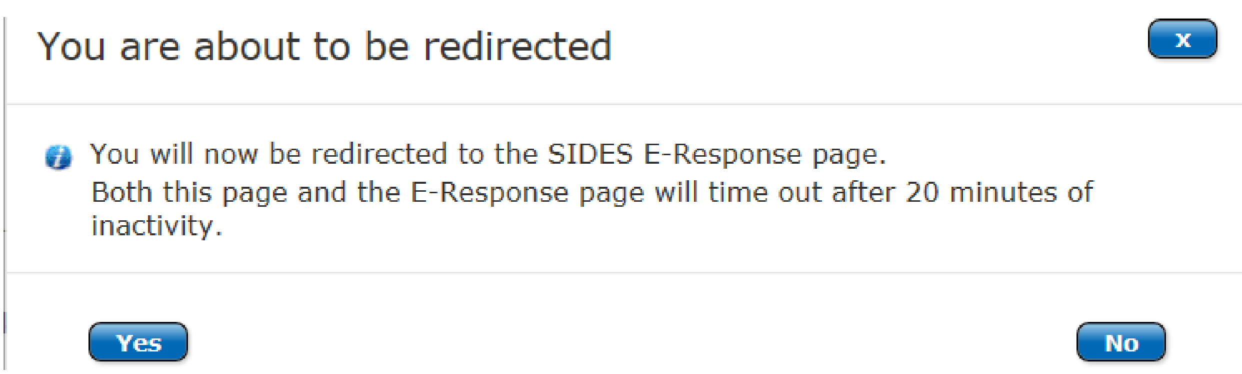
6. Print List

If you need to print the list of documents that are pending for your records, click on the Print List button and it will print a Word Document of the information that is listed on the page at the time it is printed.

<u>RESPONSE INPUT SCREENS</u>

<u>Responding to the Notice of Claim & Verification Request (known as NOC or Request for Separation Information)</u>

In most cases, you will be redirected to SIDES E-Response screens for collection of separation information including dates of employment, reason and details about separation and separation pay. If you have answered questions via E-Response about separation and separation pay, you do not need to separately answer same or similar questions via a Request for Information document. \



NOTE: When you click Yes button, you should receive a page that has the following header.

If you are not redirected to SIDES E-Response, you will be required to separately respond to the NOC and any other Requests for Information that reference the separation or separation pay.


NHES "We're working to keep New Hampshire working"

Notice Of Claim & Verification Request

Employer: EMPLOYER NAME
Form Id Number : 5514274
UI Account Number : UI ACCOUNT #
Claimant Name INDIVIDUAL'S NAME **SSN** INDIVIDUAL'S SSN **BYE** 09/09/2017

*1. Is the address and/or account number reported for you above correct? Yes No
If the address is incorrect, please contact the Contributions Unit at 603-228-4142 to request an update to your address.
If the account number is incorrect or blank, please provide your NH unemployment tax liability account number.
(This is a Ten Digit number. Fill in leading zeroes. Example 45214 should be entered as 0000045214.
*2. Did this individual work for you? Yes No
3. First date worked provided by claimant is 06/27/2016. If not correct, please enter the correct date.
4. Last date worked provided by claimant is 09/14/2016. If not correct, please enter the correct date.
5. Claimant's stated reason for separation was: **Fired/No reason given**
* Do you agree with the reason for separation the claimant provided? Yes No
If you do not agree, please choose one reason from the following list that most closely matches why the claimant was separated.
Reason: Select one
Sub-Reason: Select one
6. If you have paid or will pay this claimant monies other than for hours actually worked due to this separation, please complete all applicable fields in the following table. This includes, but is not limited to, severance, separation pay, wages-in-lieu of notice, vacation, holiday, sick, PTO (personal time off), pension, or retirement, and bonus pay.

	Hours	Gross $$ Amount	Date of Holiday
SEVERANCE/WAGES-IN-LIEU		$	
VACATION		$	
SICK		$	
PTO (Personal Time Off)		$	
1st HOLIDAY		$	

If you are not redirected to SIDES E-Response, please go to the Change Preferences link on your Home Page and select the radio button for "I would like to use E-Response" under the Corporate Preferences for Response to Request for Separation Information section at the bottom of the page.

Please contact the department for additional questions or assistance.

Responding to Request for Information (known as RFI)

The Request for Information, also known as the RFI or Fact-Finding, contains specific questions that the department needs answered to assist in determining an individual's eligibility. Choose the radio button in front of each Type of Issue and choose the Respond button to be presented with the questions specific to that issue.

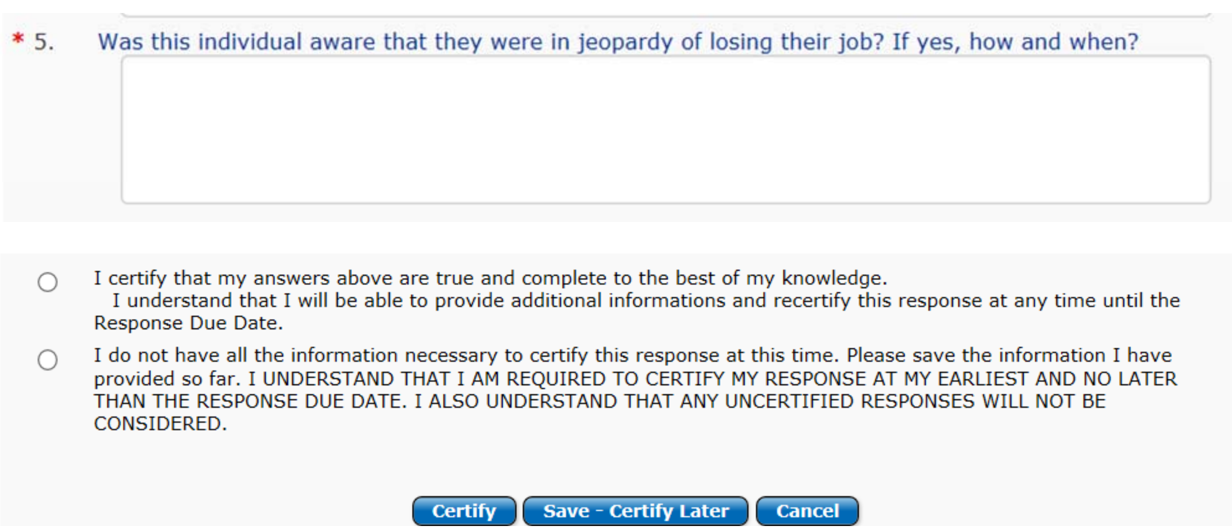
If you have already responded to the Request for Information and wish to add more information to the certified response, click "Add to Response". This is only accessible if the due date has not yet passed.

Please answer all questions presented as thoroughly as possible, which may eliminate the need for the adjudicator to contact you directly.

Note: If you see a duplicate item listed, this may be because the individual has listed this item more than once on their application. You only have to respond to one of the duplicate requests.

The Questions screen allows the user to certify their responses as complete or save and certify at a later date. You must certify your answers on or before the deadline.

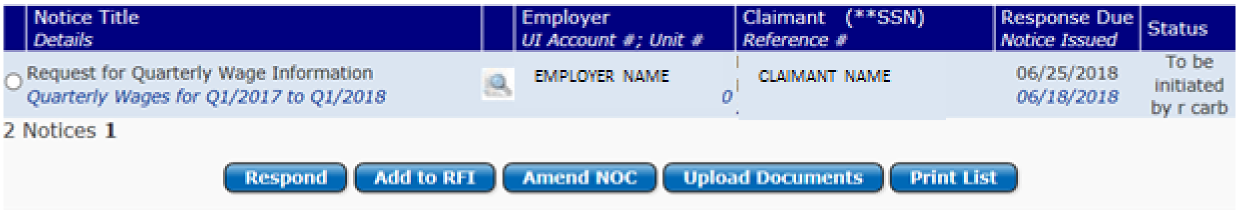
IMPORTANT: If you do not certify your answers by the deadline, all information will be discarded. The department is not provided with uncertified responses.



Responding the Wage Requests

There are 4 types of Wage Requests that you may receive. There are specific input screens for each request.

Request for Quarterly Wage Information



Notice Title / *Details*	Employer / *UI Account #; Unit #*	Claimant (**SSN) / *Reference #*	Response Due / *Notice Issued*	Status
Request for Quarterly Wage Information / *Quarterly Wages for Q1/2017 to Q1/2018*	EMPLOYER NAME / *0*	CLAIMANT NAME	06/25/2018 / *06/18/2018*	To be initiated by r carb

These types of requests are sent to either verify quarterly wages reported or because the claim is potentially missing quarterly wages based on the dates of employment provided by the claimant. It is important to have correct wage information to determine monetary eligibility. All other non-monetary eligibility criteria must be met before any payment is made to the claimant.

Request for Gross Wages for Recent Qualifying Weeks Response

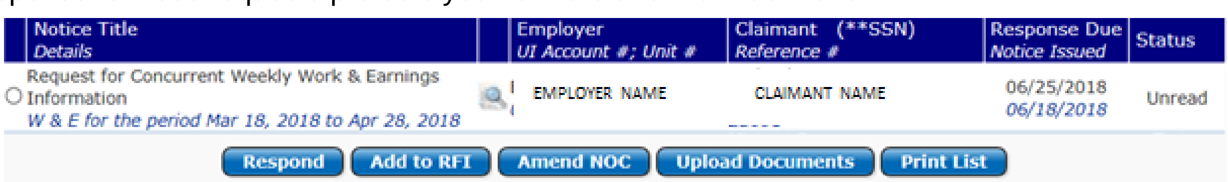
These types of requests are sent to verify the claimant's gross weekly earnings. These are generally sent because the claimant has a potential disqualification and may requalify due to your employment. Completing this request does not automatically make you a chargeable employer or determine eligibility for benefits.

Notice Title / *Details*	Employer / *UI Account #; Unit #*	Claimant (**SSN) / *Reference #*	Response Due on / *Notice Issue Date*	Status
Request for Gross Wages for Recent Qualifying Weeks / *Gross Wages for recent qualifying weeks*	EMPLOYER NAME	CLAIMANT NAME	11/17/2017 / *10/19/2017*	To be Initiated

Responding to the Request for Concurrent Weekly Work & Earnings Information and/or Weekly Work & Earnings Request (W & E)

These types of requests may ask for any number of weeks of hours worked and wages earned information. If a "Concurrent" request, the information is used to determine if your account should or should not be charged based on concurrent employment with another employer. If the request is not "Concurrent", it is from our Benefit Payment Control unit and is being requested to ensure that benefits were not paid to an individual while they were also working.

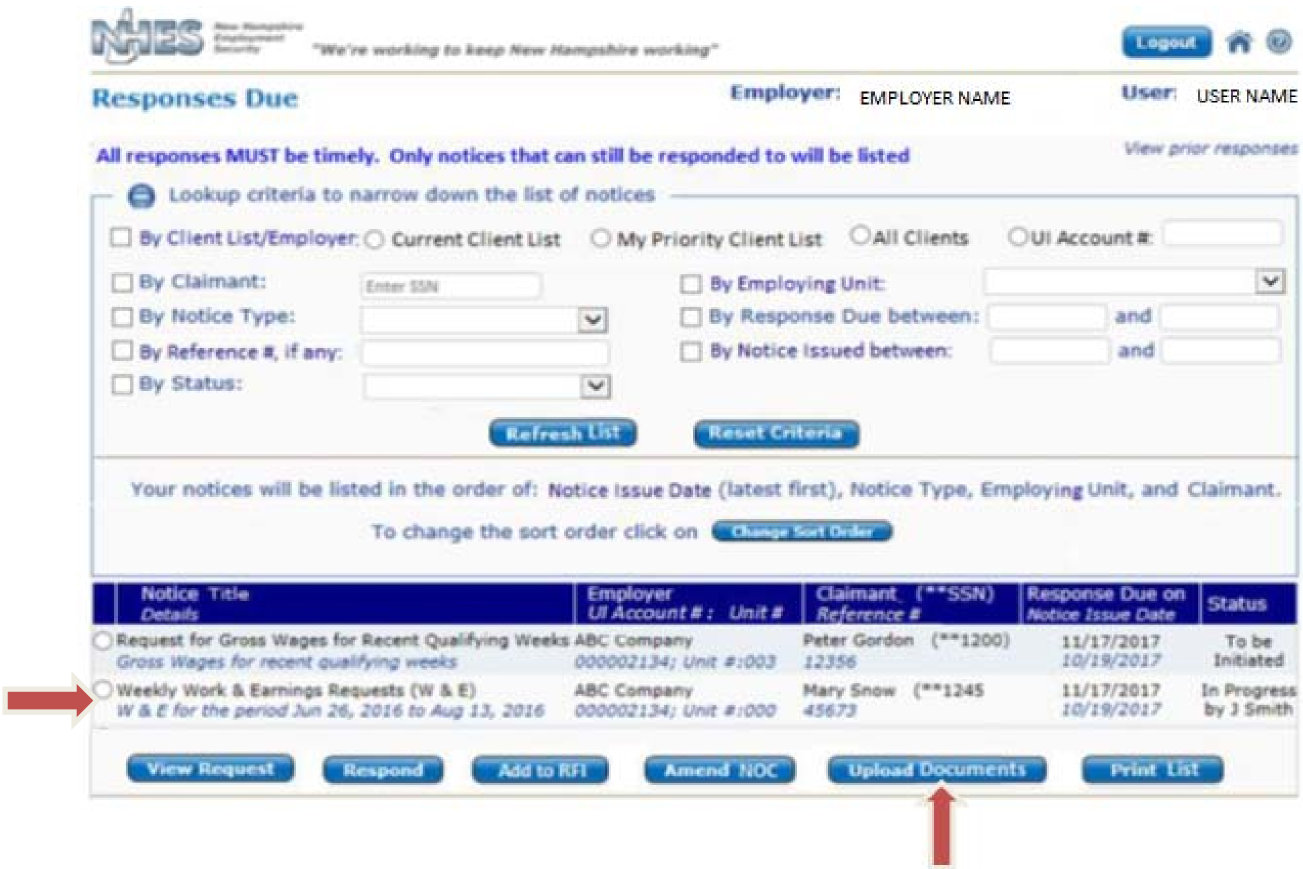
Your response to these requests protects your tax rate and the Trust Fund.



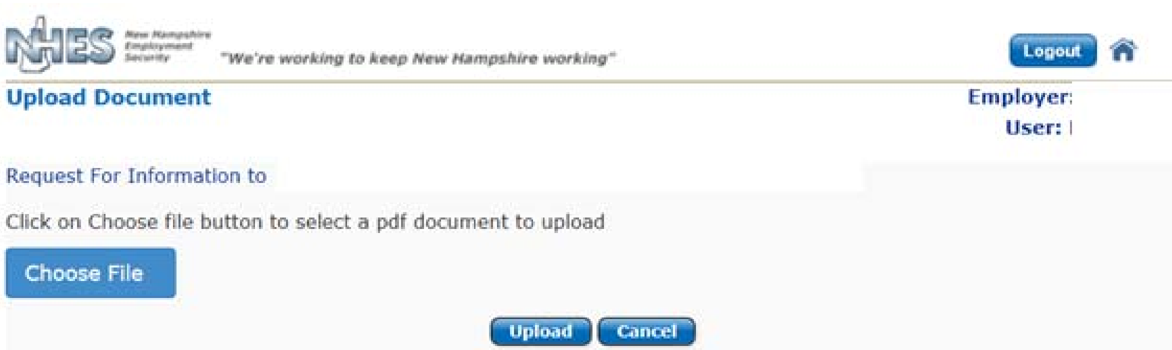
Notice Title / *Details*	Employer / *UI Account #; Unit #*	Claimant (**SSN) / *Reference #*	Response Due / *Notice Issued*	Status
Request for Concurrent Weekly Work & Earnings Information / *W & E for the period Mar 18, 2018 to Apr 28, 2018*	EMPLOYER NAME	CLAIMANT NAME	06/25/2018 / *06/18/2018*	Unread

Uploading Documents

Documents for upload could be items such as check stubs, payroll records, warnings or any supporting documents you feel that the department needs to properly determine eligibility for benefits. The department only accepts PDF documents.



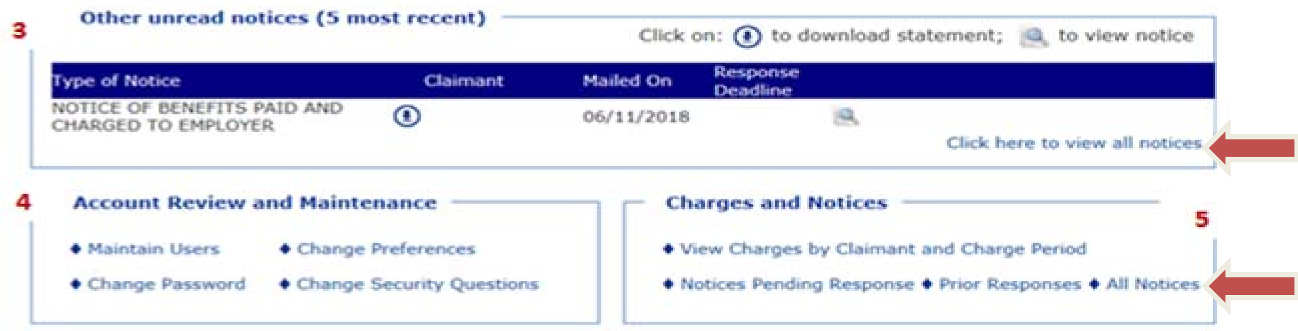
To upload an Adobe PDF document, choose the radio button for the Notice Type that the document is for, click on the "Upload Documents" button and follow the prompts.



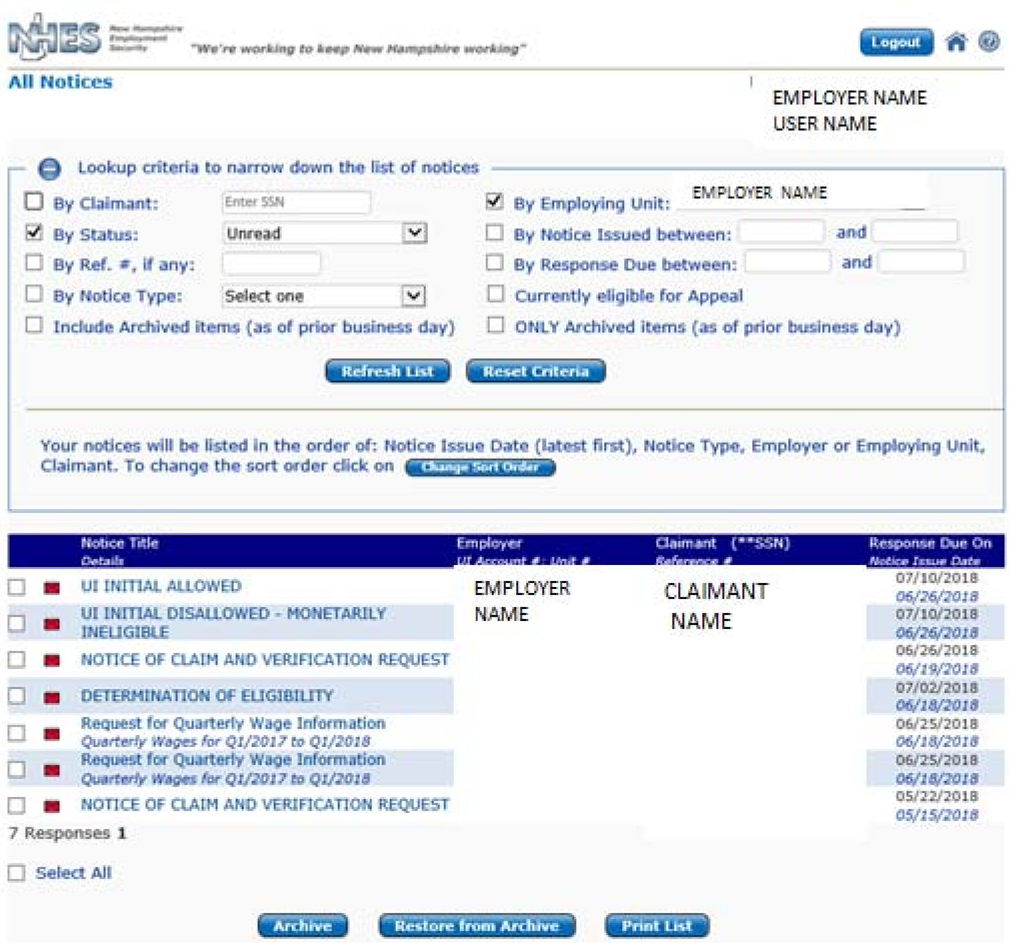
IMPORTANT: Any document uploaded will NOT be available to NHES staff nor in your list of uploaded documents until the document is certified to be free of any virus. If successfully passed virus check, the document name will be in your list of uploaded documents the day after you have uploaded it.

Accessing ALL Notices

All Notices, read or unread, pending or completed, archived or not, can be accessed using the “View” links in Section 3 or 5 of the Home Page.



The All Notices page offers a wide variety of options to filter and sort the presentation of documents.

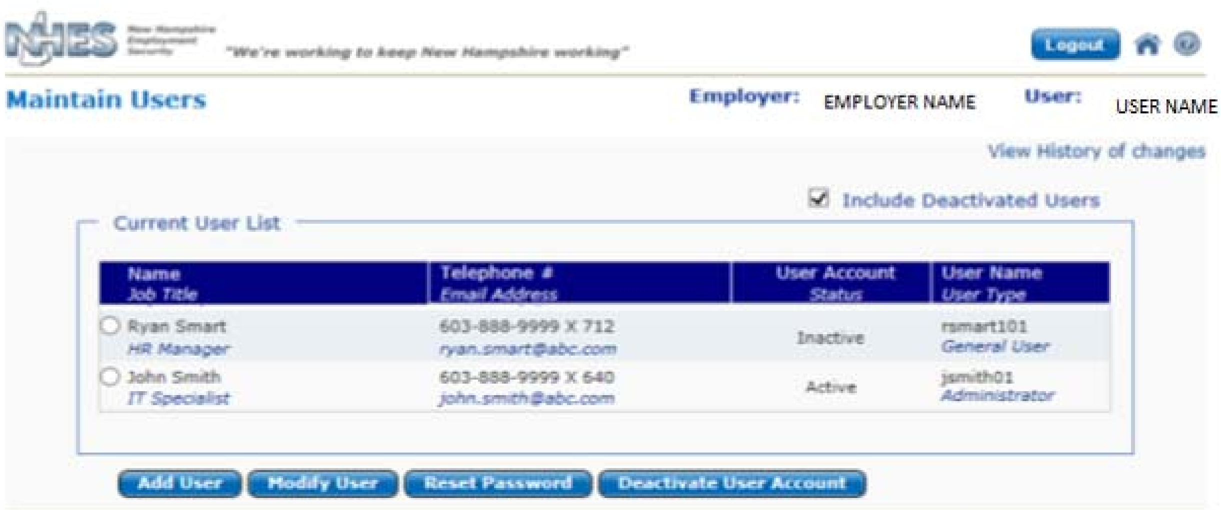


Account Review and Maintenance

In Section 4 of the Home Page, your NHUIS account Administrator can manage the employers account as well as their own individual account. If a General User, Section 4 will not offer the Maintain Users functions.

Maintain Users

Only Administrators are permitted to use this section. This allows the Administrator to add, modify or deactivate users.



Add User – Using this function allows you to create a new user and to identify this individual as an Adminstrator or a General User.

Modify User – Change the Personal Information of the User or their status to/from Administrator to General User. (Note: the User Name cannot be modified)

Reset Password – Reset the specific User's password to a new temporary password (good for that day only).

Deactivate User Account – Deactivate the User account.

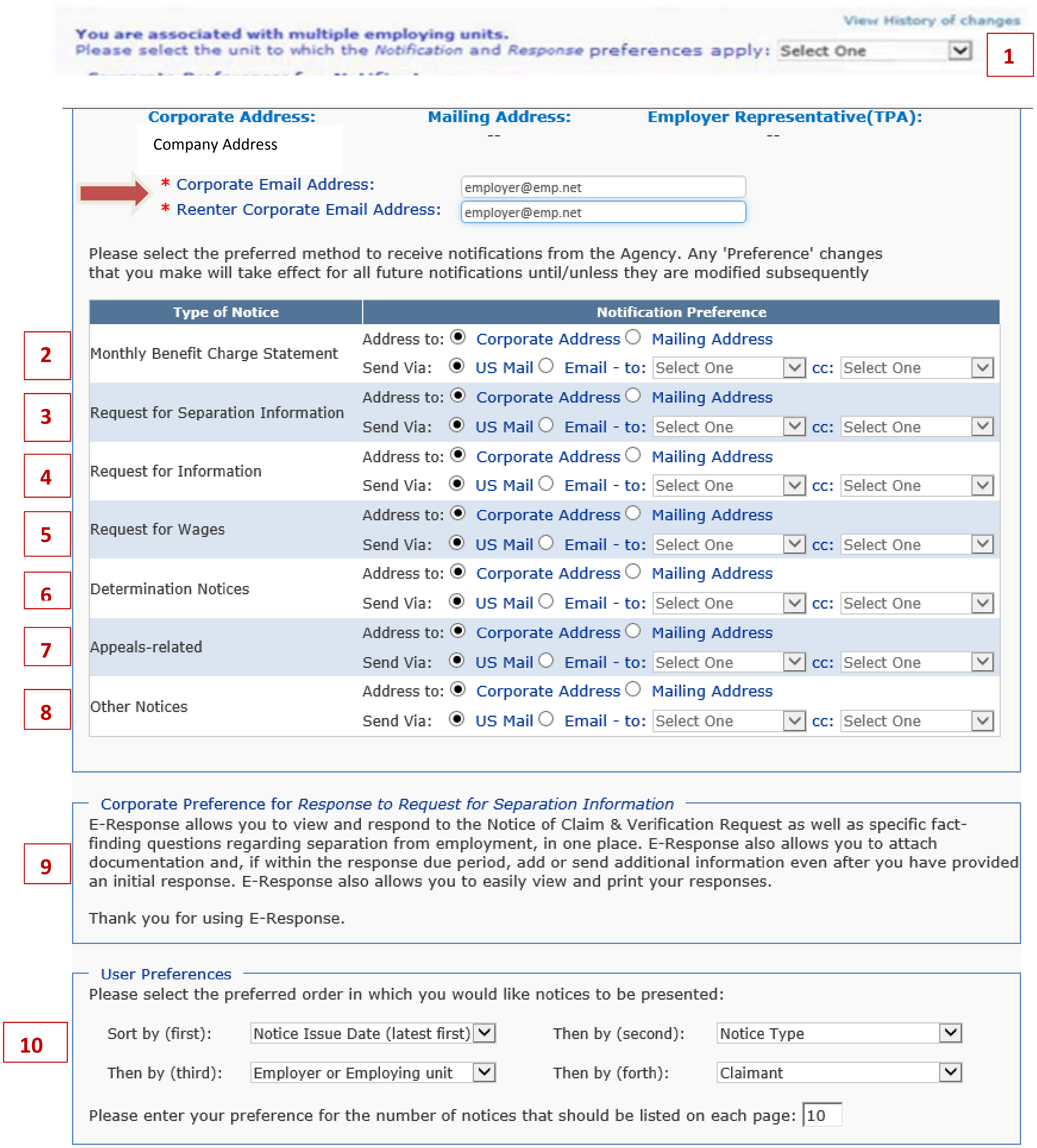
Please note: There is no reactivation function. If a User is deactivated, that individual can be added again as a new user, but they cannot be reactivated.

You can also view the history of changes made on the employer's account, including staff changes made based on the employer's request.

Change Preferences

The Preferences page allows authorized Users to view and alter the employer's/employing unit's/TPA's, preferred methods to receive different types of notifications and set the preference for responding to requests for separation info.

Note: if you want to modify this page, a corporate email address must be entered. If your company does not have a general email address, please enter your email address.



View History of changes

You are associated with multiple employing units.
Please select the unit to which the *Notification* and *Response* preferences apply: Select One

1

Corporate Address: Company Address

Mailing Address: --

Employer Representative(TPA): --

* Corporate Email Address: employer@emp.net

* Reenter Corporate Email Address: employer@emp.net

Please select the preferred method to receive notifications from the Agency. Any 'Preference' changes that you make will take effect for all future notifications until/unless they are modified subsequently

	Type of Notice	Notification Preference
2	Monthly Benefit Charge Statement	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One
3	Request for Separation Information	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One
4	Request for Information	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One
5	Request for Wages	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One
6	Determination Notices	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One
7	Appeals-related	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One
8	Other Notices	Address to: Corporate Address / Mailing Address Send Via: US Mail / Email - to: Select One cc: Select One

9

Corporate Preference for *Response to Request for Separation Information*

E-Response allows you to view and respond to the Notice of Claim & Verification Request as well as specific fact-finding questions regarding separation from employment, in one place. E-Response also allows you to attach documentation and, if within the response due period, add or send additional information even after you have provided an initial response. E-Response also allows you to easily view and print your responses.

Thank you for using E-Response.

10

User Preferences

Please select the preferred order in which you would like notices to be presented:

Sort by (first): Notice Issue Date (latest first) Then by (second): Notice Type

Then by (third): Employer or Employing unit Then by (forth): Claimant

Please enter your preference for the number of notices that should be listed on each page: 10

1. If you have multiple units associated with your sign-on, a special dropdown will be presented so that you can change the preferences for each of those unit locations separately.

You can choose to have different documents sent to your company in different ways – US Mail or Email notification to one or more email addresses; using the corporate, mailing or TPA address. We encourage electronic communication. The categories of documents you might receive from NHES are as follows:

2. Monthly Charge Statements are the documents that are generated on the first Friday of the month, if you have accrued any charges or credits during the prior calendar month.

3. Request for Separation Information also known as a Notice of Claim & Verification Request (NOC), is the notification that a specific individual has filed a claim and indicated that they worked for you. The department must verify dates of employment, employment status and separation reason, and if the individual will receive any monies due to this separation. For more information on how to respond to the NOC, see page 16 of this booklet.

4. Request for Information (RFI) also known as fact-finding are sent because the department is in need of more information to determine eligibility. Completing these documents in a complete and timely fashion may help protect your tax rate.

5. Request for Wages is sent because the claim is missing wage information or there is a need for verification of hours worked and wages earned for specific weeks.

6. Determination Notices are sent to Interested Parties on a claim, such as the chargeable employer or the employer associated to the decision. These notices contain information about monetary and/or non-monetary eligibility for benefits.

7. Appeal Related Notices are correspondence sent to all Interested Parties to notify them when an appeal is filed, what has been appealed, who has appealed it, when it will be scheduled for a hearing and the outcome of the appeal hearings.

8. Other Notices are any notices that do not fit into another category. This could be the Registration Code Letter or a notice relative to the establishment or severance of a relationship between an employer and a TPA.

9. Corporate Preference for Response to Separation Information. The majority of employers use SIDES E-Response (see page 16 of this booklet for details). If your company does not use E-Response, we encourage you to do so. If your company is represented by a TPA, this section will not be displayed.

10. User Preferences is where the signed in User can change how they want their notices presented to them on the All Notice page (see page 21 of this booklet for details).

<u>Change Password and Change Security Questions</u>

The individual User logged on may utilize these options to change their Password, change their Security Questions or Answers.

Reporting a Potential Eligibility Issue

Section 6 allows employers to report potential misrepresentation or issues to the department. To protect your tax rate and help protect the Trust Fund, we ask that you notify the department as soon as you become aware of a new issue or new information that may impact an individual's eligibility.

You will be asked a series of questions that will alert the department to start an investigation or to question the individual filing for benefits. You are one of our best defenses against fraud.

WorkShare

Section 7 provides access to the WorkShare application. An employer can file a new WorkShare plan or manage an existing Plan. If you do not have an existing plan with the department and want to know more, please contact the WorkShare department via email at WorkShare@NHES.NH.GOV.

Web Tax and New Hire Reporting

Section 8 provides access to the WebTax application. An employer can file their quarterly taxes and report New Hires electronically to the department.

Creating a Priority Client List – TPA's only

You can create a set list of your priority clients or assign specific clients to specific Users to help your company assign work. Each User can created their own list and, once created, it can be easily Viewed or Altered, saved for future use or only for the current work session.

After you have clicked on Create a Priority Client List you will be presented with the following screen. You can filter this list and chose all or some of the clients. This will then allow the authorized user to maintain these assigned clients.

Using the radio button options and the SEARCH button, you can present the entire list of companies you represent, checkbox those you wish to make part of your My Priority Client list and click DONE to save.

If you want to change your established Priority Client list, choose "Alter List" as indicated below on your Home Page.