







## Adding or Modifying a Contact

Step 1: Login to your Employer Self-Service portal .

**Employers:** When you login, you will automatically be on the landing page

**Agents:** Once you are logged into your Agent Self-Service Portal, you will need to navigate to your client's self-service portal. This can be done by clicking on the Employer Lookup tab, entering the employer's ID, and click search. Click on the EIN, which will be hyperlinked, and you will be navigated to the Employer Self-Service portal.

Welcome to the Employer Self-Service Portal      

Employer Home

Employer Information

Employer Account ID:	Business Name:
	Test Account
Effective Tax Rate:	EIN:
0.000%	99-9999999
DBA Name:	Employment Type:
Account Status:	Reporting Type:
Active	Contributory
Liability Date:	

Unread Messages

No records to display.

VIEW MORE

Wages Filing and Payment

Year	Filing	UI Payment
Q2-2021		
Q1-2021		
Q4-2020		
Q3-2020		
Q2-2020		

Estimated

No Action

Past Due

Not Liable

Due Approaching

FILE WAGES

Total Unpaid UI Taxes and Amount Due

UI/Charge Taxes:	Interest
\$0.00	\$0.00
Penalty	Total Due
\$0.00	\$0.00

Your most recent payment was received on: for \$0.00

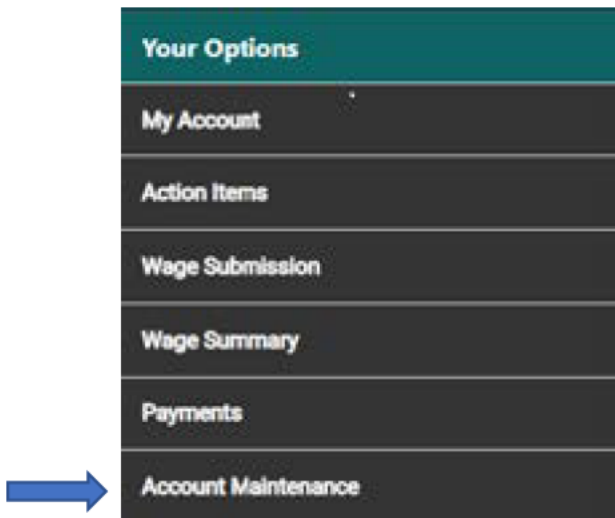
Quick Actions

- Change Address/Phone
- Change Communication Preference
- Agent Assignment
- Request Account Information

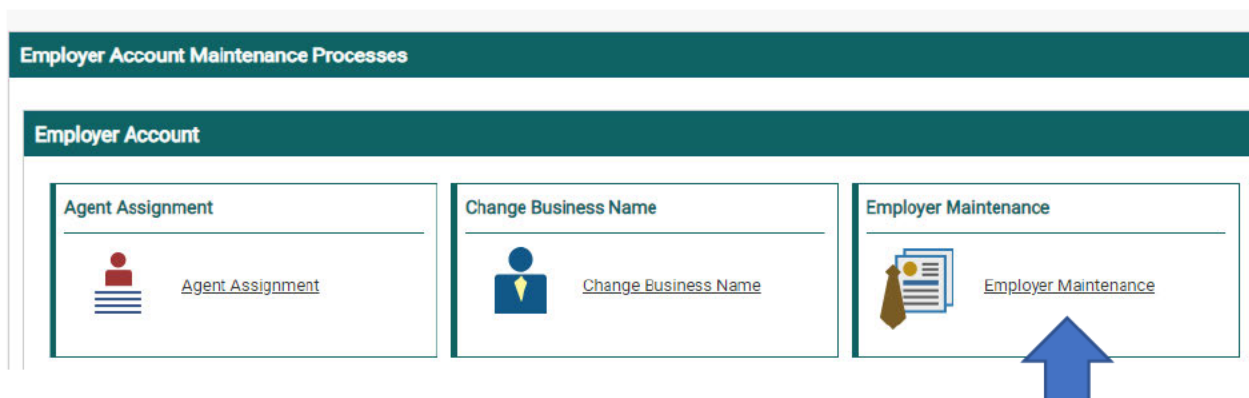
Benefit Charges

No recent benefit charges found.

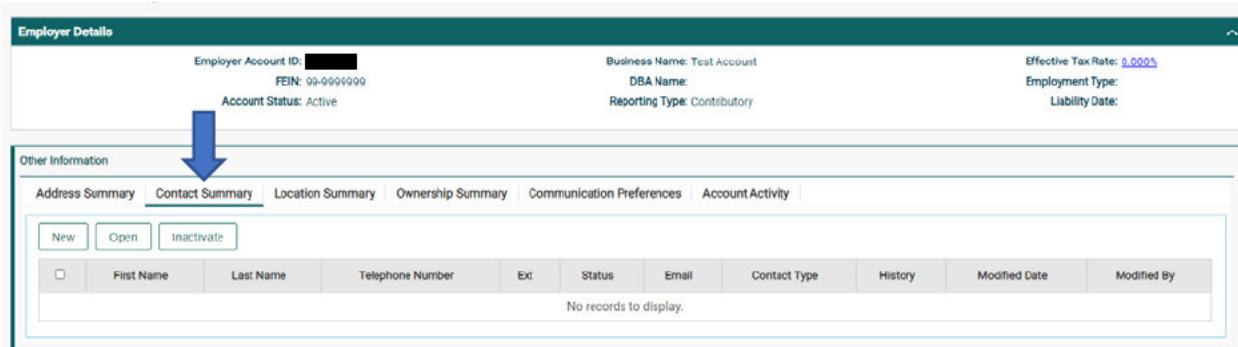
Step 2: Click on the Account Maintenance option located on the left-hand side of the screen, under Your Options.



Step 3: Click on the Employer Maintenance link.



Step 4: Click on the Contact Summary tab.



Step 5: Click on **New** to add a new contact to the account.

The screenshot shows the 'Employer Details' section with fields for Employer Account ID, FEIN, Account Status, Business Name, DBA Name, Reporting Type, Effective Tax Rate, Employment Type, and Liability Date. Below this is the 'Other Information' section with tabs for Address Summary, Contact Summary, Location Summary, Ownership Summary, Communication Preferences, and Account Activity. The 'Contact Summary' tab is active, showing a table with columns: First Name, Last Name, Telephone Number, Ext, Status, Email, Contact Type, History, Modified Date, and Modified By. A blue arrow points to the 'New' button above the table.

Step 6: Select the **Contact Type Code** from the list provided. To receive Benefits information, please select contact type code **Benefits**.

The screenshot shows the 'Contact Information' section. The 'Contact Type Code' dropdown menu is open, displaying a list of options: Accounting, Benefits, CNA, Human Resources, Legal, Other, Payroll, and Tax Consultant. A blue arrow points to the 'Benefits' option. Other fields include First Name, Address Line 1, City, ZIP/Postal Code, Email, Telephone Number, Ext, Last Name, Address Line 2, State, Country, and Alternate Telephone Number. A 'Validate Address' button is at the bottom left.

Step 7: Fill in the required information in blanks with a red asterisk next to the box.

The screenshot shows the 'Contact Information' section with all fields now filled out. Blue arrows point to the required fields marked with a red asterisk: First Name, Address Line 1, City, ZIP/Postal Code, Email, Telephone Number, Last Name, Address Line 2, State, and Country. The 'Contact Type Code' is set to 'Benefits'. A 'Validate Address' button is at the bottom left.

Step 8: Once the new information is entered, click on **Validate Address**.

**Employer Details**

Employer Account ID: [REDACTED] Business Name: Test Account Effective Tax Rate: 0.000%

FEIN: 99-9999999 DBA Name: Employment Type: [REDACTED]

Account Status: Active Reporting Type: Contributory Liability Date: [REDACTED]

**Contact Information**

Contact Type Code: Tax Consultant

First Name: SC

Address Line 1: 1550 Gadsden St

City: Columbia

ZIP/Postal Code: 29202

Email: SCDEW@TestAccount.com

Telephone Number: (803) 737-2400 Ext: [REDACTED]

If you selected Other, describe:

Last Name: DEW

Address Line 2: [REDACTED]

State: South Carolina

Country: United States of America

Alternate Telephone Number: [REDACTED]

**Validate Address**

Step 9: The address Validation box will pop up, and you may click on the blue hyperlink address:

**Address Suggestions**

Choose address from below recommendations

Please select first highlighted row of the grid as current entered address above.

Address1	Address2	City	IblnFirstRecord	State	Zip
<a href="#">1550 Gadsden St</a>		Columbia	true	SC	29202

Email: SCDEW@TestAccount.com

Step 10: Click **Save**.

**Save**

**Employer Details**

Employer Account ID: [REDACTED] Business Name: Test Account Effective Tax Rate: 0.000%

FEIN: 99-9999999 DBA Name: Employment Type: [REDACTED]

Account Status: Active Reporting Type: Contributory Liability Date: [REDACTED]

**Contact Information**

Contact Type Code: Tax Consultant

First Name: SC

Address Line 1: 1550 Gadsden St

City: Columbia

ZIP/Postal Code: 29202

Email: SCDEW@TestAccount.com

Telephone Number: (803) 737-2400 Ext: [REDACTED]

If you selected Other, describe:

Last Name: DEW

Address Line 2: [REDACTED]

State: South Carolina

Country: United States of America

Alternate Telephone Number: [REDACTED]

**Validate Address**

Step 11: All saved changes will appear. You may need to refresh the screen for changes to appear.

The screenshot shows the 'Employer Details' page. At the top, there are three columns of information: Employer Account ID (redacted), Business Name (Test Account), and Effective Tax Rate (0.000%). Below this, there are FEIN (99-9999999), DBA Name, and Employment Type. The Account Status is Active, and the Reporting Type is Contributory. The Liability Date is also shown. Below this, there is a section for 'Other Information' with tabs for Address Summary, Contact Summary, Location Summary, Ownership Summary, Communication Preferences, and Account Activity. The Contact Summary tab is selected. Below the tabs are buttons for New, Open, and Inactivate. A table lists contacts with columns for First Name, Last Name, Telephone Number, Ext, Status, Email, Contact Type, History, Modified Date, and Modified By. The first contact is SC (redacted), DEW, (803)737-2400, 0, Active, SCDEW@TestAccount.com, Tax Consultant, and Modified Date 09/21/2021. The Modified By field is redacted.

	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
<input type="checkbox"/>	SC	DEW	(803)737-2400	0	Active	SCDEW@TestAccount.com	Tax Consultant		09/21/2021	[Redacted]

Step 12: To update an existing contact, check the box to the left of it and click Open.

This screenshot is identical to the previous one, but with a blue arrow pointing to the 'Open' button and another blue arrow pointing to the checkbox next to the first contact in the table.

	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
<input checked="" type="checkbox"/>	SC	DEW	(803)737-2400	0	Active	SCDEW@TestAccount.com	Tax Consultant		09/21/2021	[Redacted]

Step 13: Follow above steps 7 – 11.

Step 14: To inactivate an existing contact, check the box next to the contact that you wish to inactivate and click the Inactivate button.

This screenshot is identical to the previous one, but with a blue arrow pointing to the 'Inactivate' button and another blue arrow pointing to the checkbox next to the first contact in the table.

	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
<input checked="" type="checkbox"/>	SC	DEW	(803)737-2400	0	Active	SCDEW@TestAccount.com	Tax Consultant		09/21/2021	[Redacted]

Step 15: The status of the contact will be updated to inactive.

**Employer Details**

Employer Account ID: 100 [REDACTED] Business Name: Test Account Effective Tax Rate: 0.000%  
FEIN: 99-9999999 DBA Name: Employment Type:  
Account Status: Active Reporting Type: Contributory Liability Date:

**Other Information**

Address Summary | **Contact Summary** | Location Summary | Ownership Summary | Communication Preferences | Account Activity

New Open Inactivate

<input type="checkbox"/>	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
<input type="checkbox"/>	SC	DEW	(803)737-2400	0	Inactive	SCDEW@TestAccount.com	Tax Consultant	<a href="#">History</a>	09/21/2021	Har [REDACTED]

### Update Communication Preferences

To update Communication Preferences, follow Steps 1-3 above, then click on **Communication Preferences**.

**Other Information**

Address Summary | Contact Summary | Location Summary | Notes | NAICS Summary | Ownership Summary | **Communication Preferences** | Account Activity

New

<input type="checkbox"/>	Address	City	State	ZIP	Address type	History	Modified Date	Modified By
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Click on **New** to add Communication Preference. Click **Inactivate** to cancel an existing Communication Preference.

Address Summary | Contact Summary | Location Summary | Notes | NAICS Summary | Ownership Summary | **Communication Preferences** | Account Activity

New Inactivate

<input type="checkbox"/>	Business Area	Contact Level	Communication Preference	Email	Status	Phone Number
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Select the appropriate Business Area.

**Communication Preference**

Business Area: \* Benefit

Contact Level: \*

How would you like to receive your communication? \* Select One

Note: Electronic communication is only available in English at this time.

Save

Select the appropriate Contact Level.

**Communication Preference**

Business Area: \* Benefit

Contact Level: \* Primary

How would you like to receive your communication? \* Select One

Note: Electronic communication is only available in English at this time.

Save

Select the appropriate field for “How you would like to receive communication?” Enter the current contact information for whichever method selected and click **Save** to see updated list.

Communication Preference

Business Area: \* 

Benett

Contact Level: \* 

Primary

How would you like to receive your communication? \* 

Email

Email Address: \*

Note: Electronic communication is only available in English at this time.

Save

Other Information

Address Summary

Contact Summary

Location Summary

Notes

NAICS Summary

Ownership Summary

Communication Preferences

Account Activity

New

Inactivate

	Business Area	Contact Level	Communication Preference	Email	Status	Phone Number
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						