Adding and/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.

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

Your Options

My Account

Action Items

Wage Submission

Wage Summary

Payments

Account Maintenance
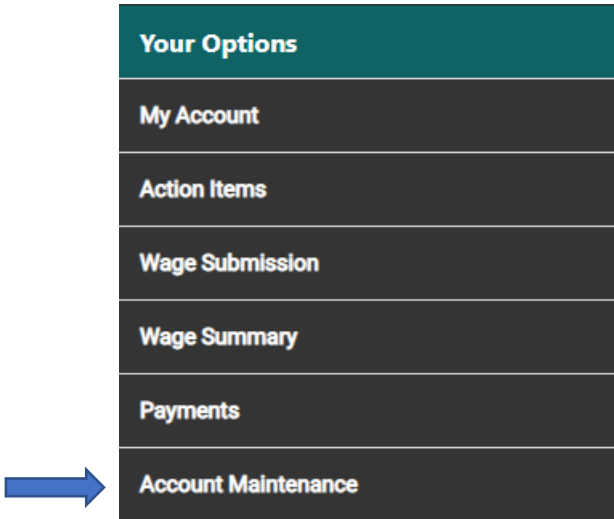
Step 3: Click on the Employer Maintenance link:

Employer Account Maintenance Processes

Employer Account

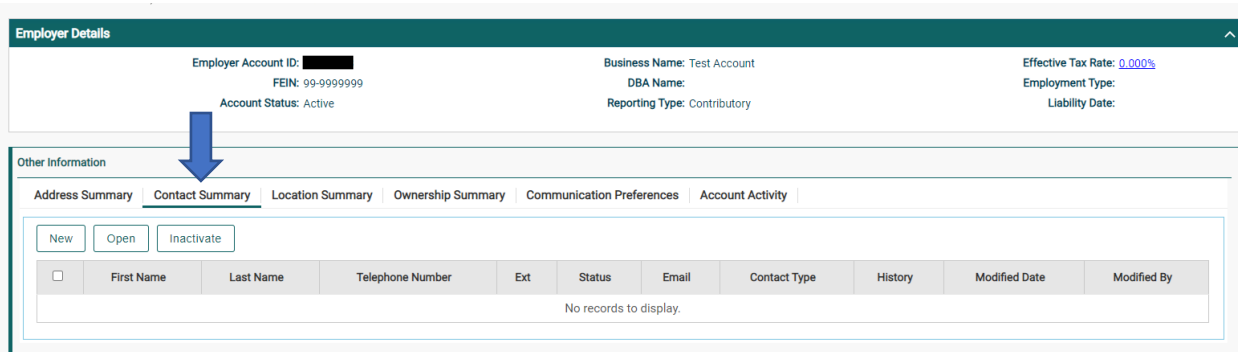| Agent Assignment	Change Business Name	Employer Maintenance
Agent Assignment	Change Business Name	Employer Maintenance
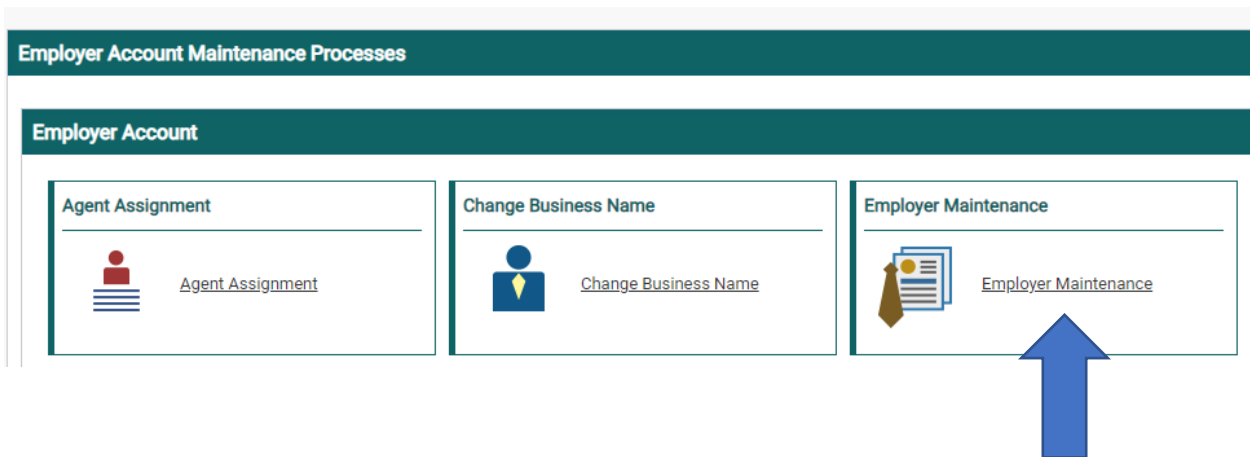
Step 4: Click on the Contact Summary tab:

Employer Details

Employer Account ID:	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

	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
					No records to display.					

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

Employer Details

Employer Account ID:	**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

	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
				No records to display.						

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

Save

Employer Details

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

Contact Information

Contact Type Code:		**If you selected Other, describe:**	
First Name: *		**Last Name:** *	
Address Line 1: *	Accounting / Benefits / CPA / Human Resources / Legal / Other / Payroll / Tax Consultant	**Address Line 2:**	
City: *		**State:** *	South Carolina
ZIP/Postal Code: *		**Country:** *	United States of America
Email: *		**Alternate Telephone Number:**	
Telephone Number: *	Ext		

Validate Address

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

Save

Employer Details

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

Contact Information

Contact Type Code:		**If you selected Other, describe:**	
First Name: *		**Last Name:** *	
Address Line 1: *		**Address Line 2:**	
City: *		**State:** *	South Carolina
ZIP/Postal Code: *		**Country:** *	United States of America
Email: *		**Alternate Telephone Number:**	
Telephone Number: *	Ext		

Validate Address

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

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

Step 10: Click Save

Step 11: All Saved Changes will appear; you may have to refresh the screen:

Step 12: To update an existing contact, check the box next to the contact that you wish update and click Open:

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:

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

Employer Details

Employer Account ID: ▮	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

☐	First Name	Last Name	Telephone Number	Ext	Status	Email	Contact Type	History	Modified Date	Modified By
☐	SC	DEW	(803)737-2400	0	Inactive	SCDEW@TestAccount.com	Tax Consultant	History	09/21/2021	▮