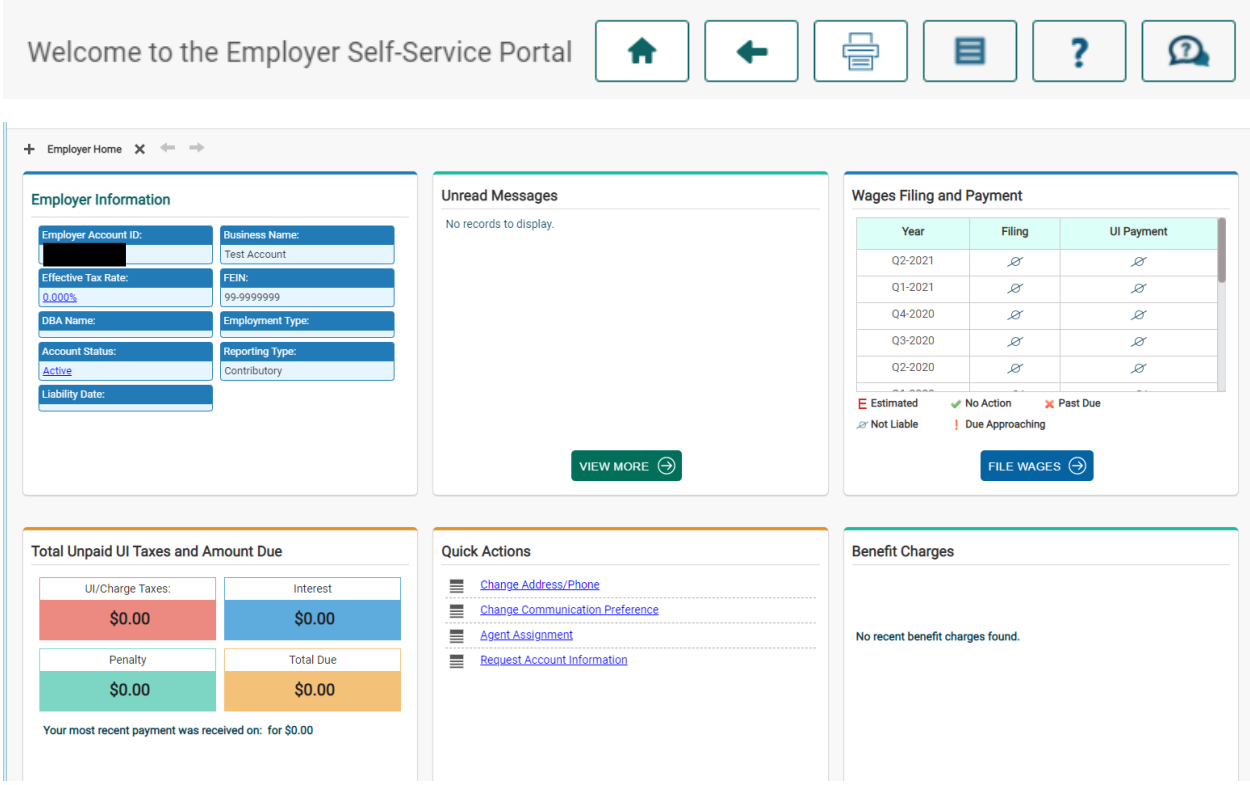
Adding and/or Modifying a Contact

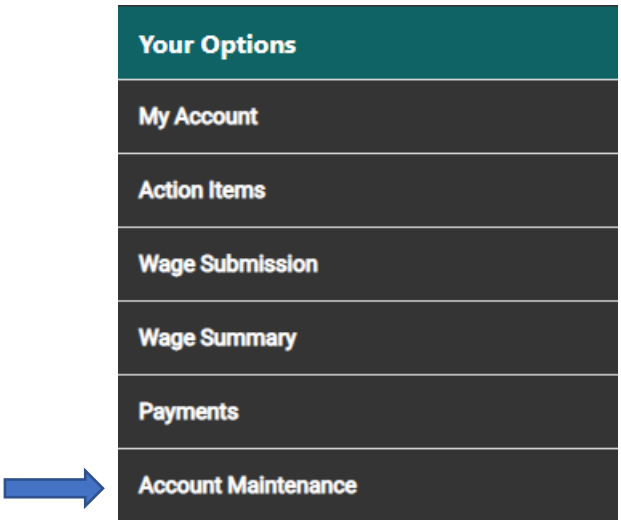
Step 1: Login to your Employer Self-Service portal

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

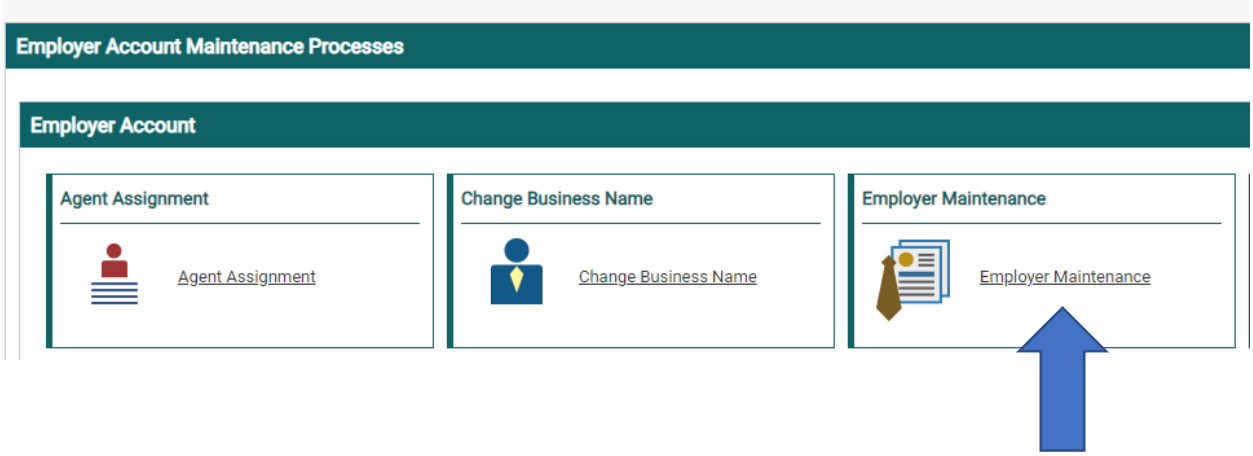
Agents: Once you are logged into your Agent Self-Service Portal, you will need to navigate to your client's self-service portal. This can be done by clicking on the Employer Lookup tab, entering the employer's ID, and click search. Click on the EIN, which will be hyperlinked, and you will be navigated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



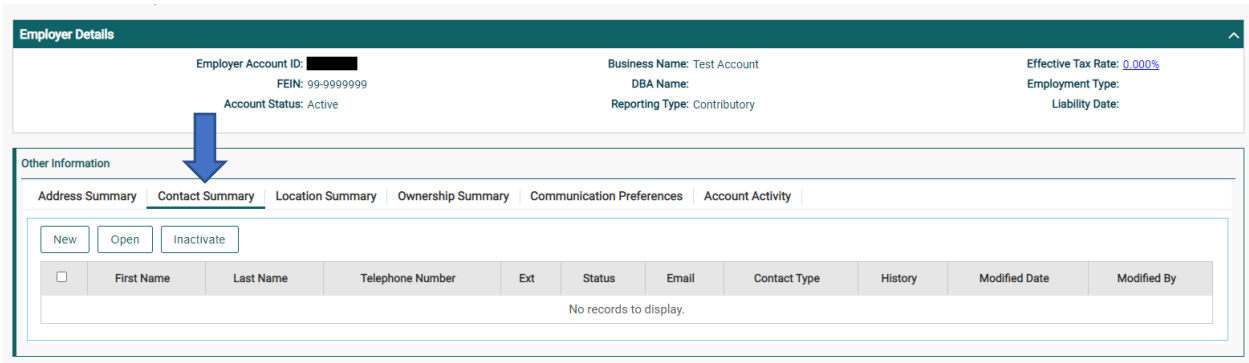
Step 2: Click on the Account Maintenance option located on the left-hand side of the screen, under Your Options:



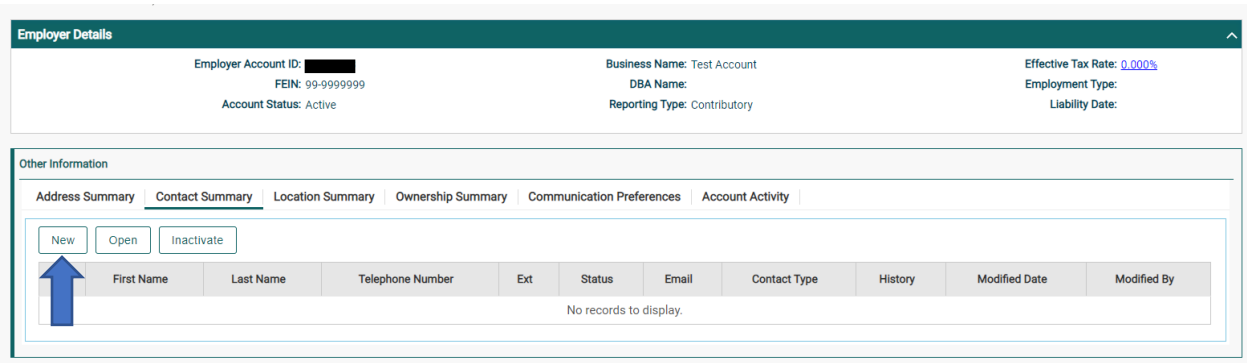
Step 3: Click on the Employer Maintenance link:



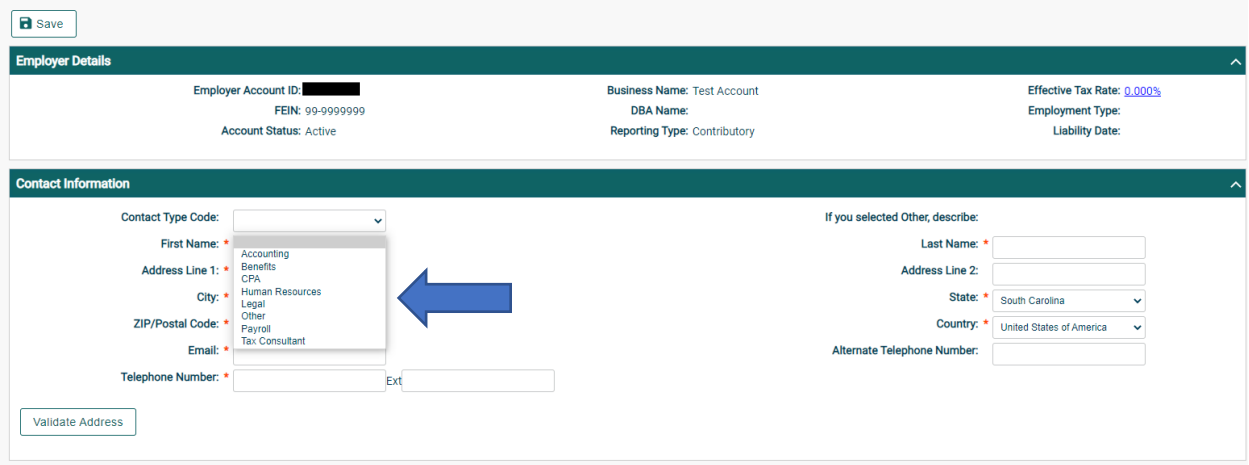
Step 4: Click on the Contact Summary tab:



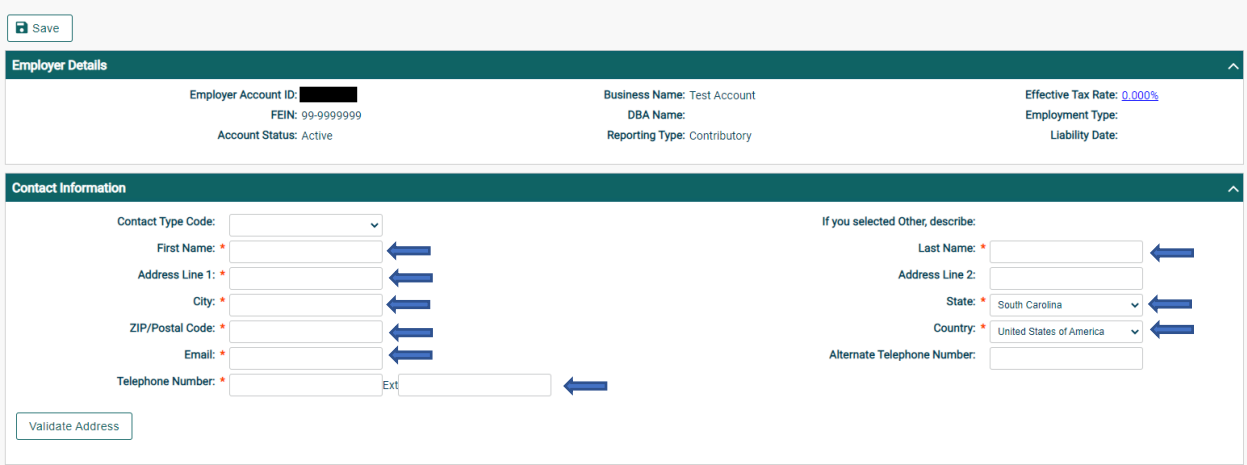
Step 5: Click on the New button to add a new contact to the account:



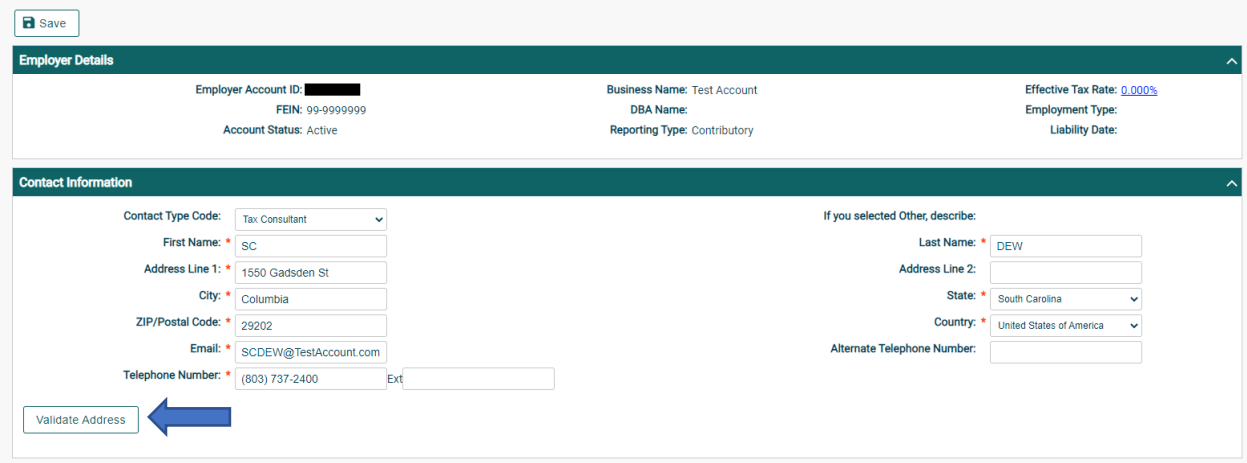
Step 6: Select the Contact Type Code from the list provided. To receive Benefit's information, please select contact type code Benefits.



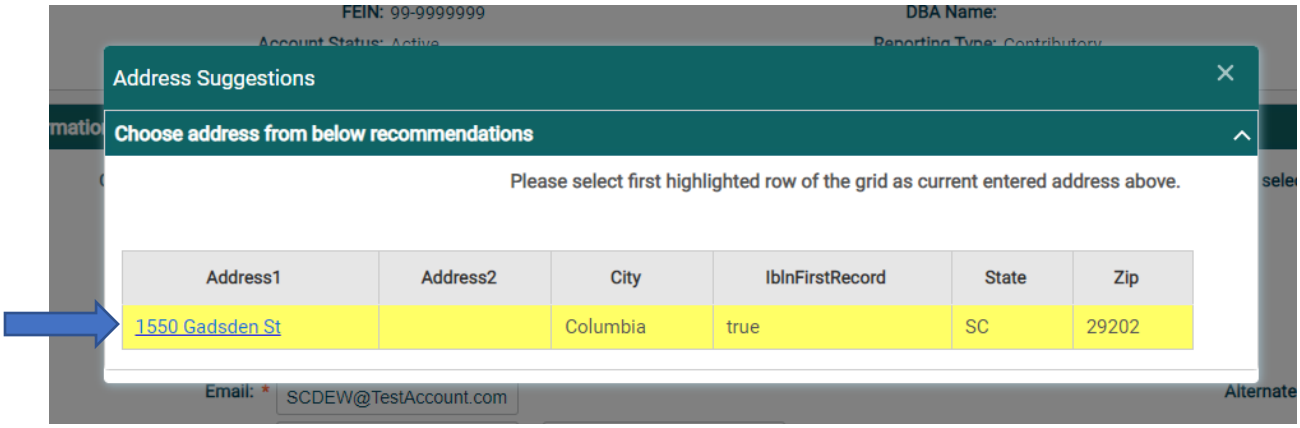
Step 7: Fill in the required information with a red asterisk next to the box.



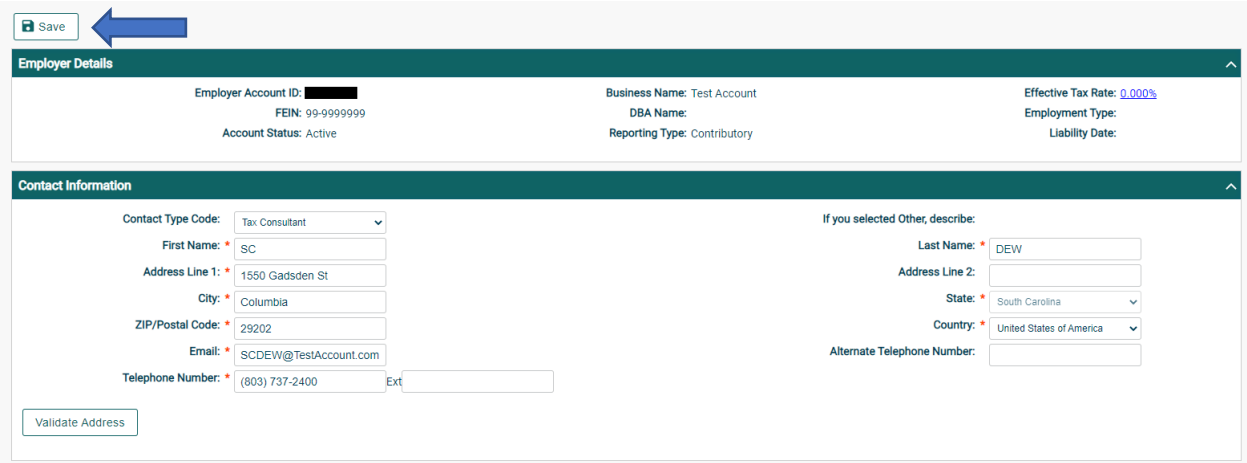
Step 8: Once the new information is entered, click on Validate Address:



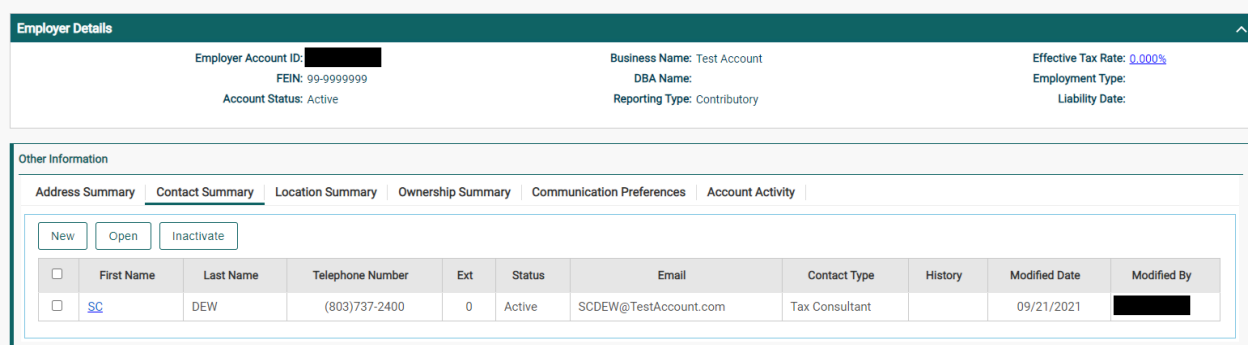
Step 9: The address Validation box will pop up, and you may click on the blue hyperlink address:



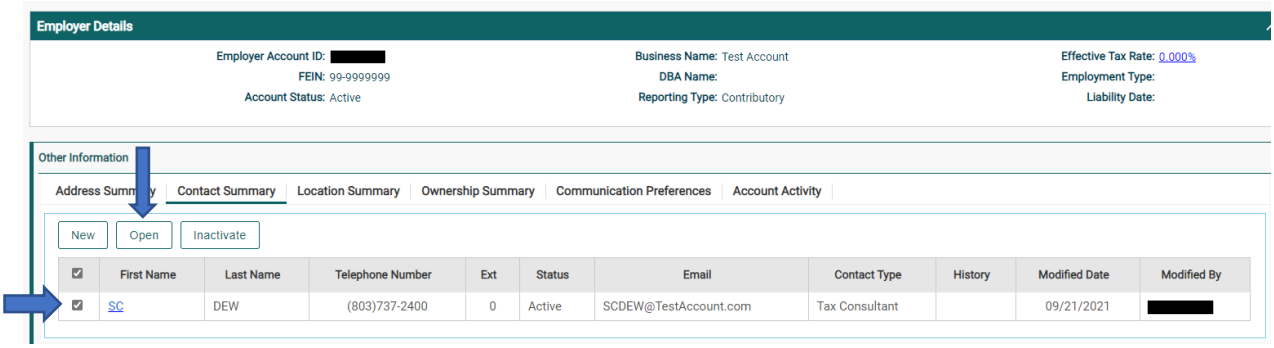
Step 10: Click Save



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

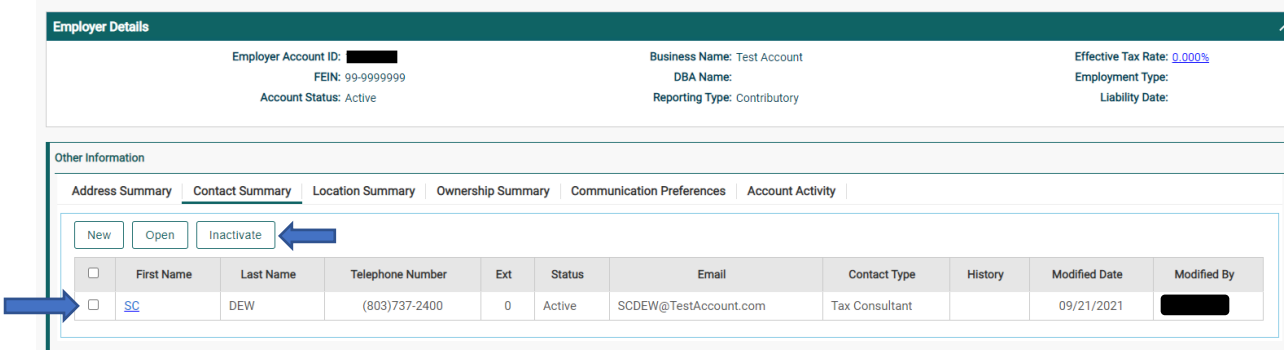
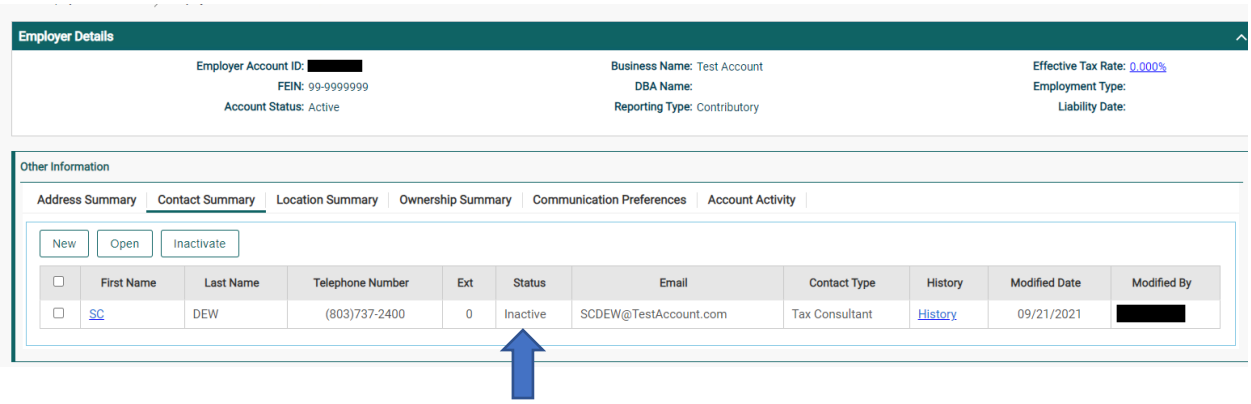


Step 12: To update an existing contact, check the box next to the contact that you wish update and click Open:



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: