


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.

Welcome to the Employer Self-Service Portal



Employer Home

Employer Information

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

Unread Messages

No records to display.

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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

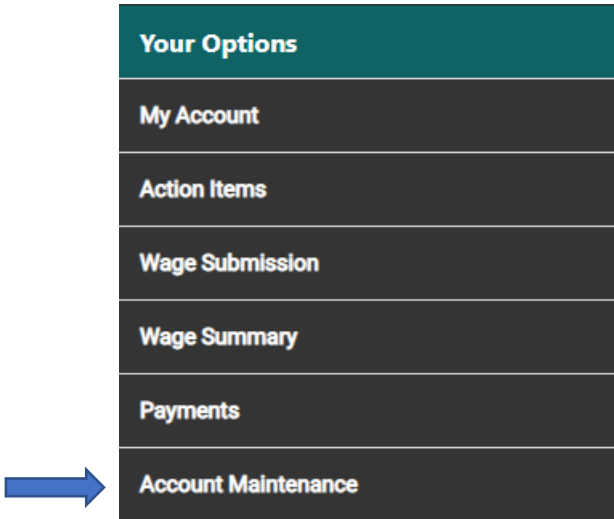
Quick Actions

- [Change Address/Phone](#)
- [Change Communication Preference](#)
- [Agent Assignment](#)
- [Request Account Information](#)

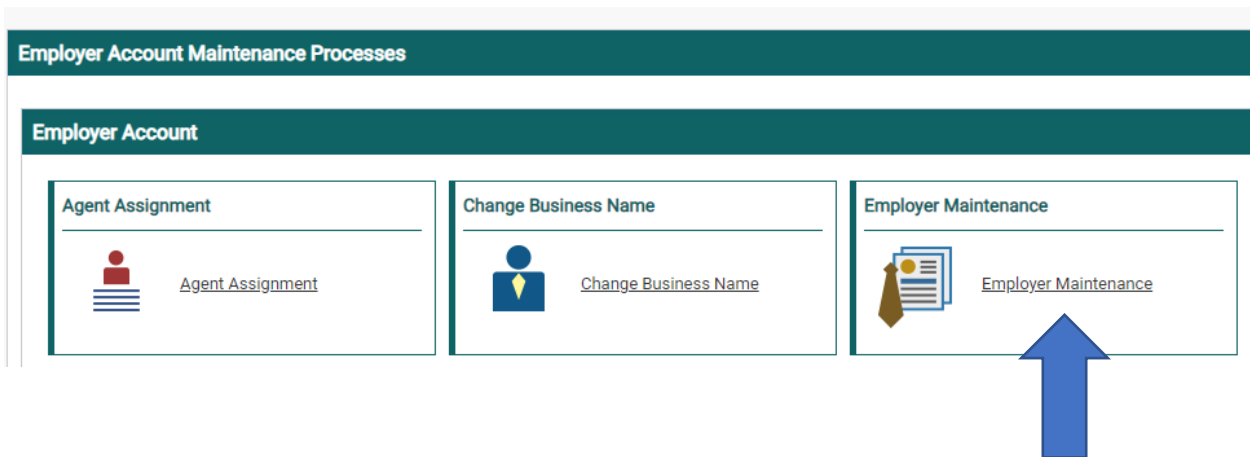
Benefit Charges

No recent benefit charges found.

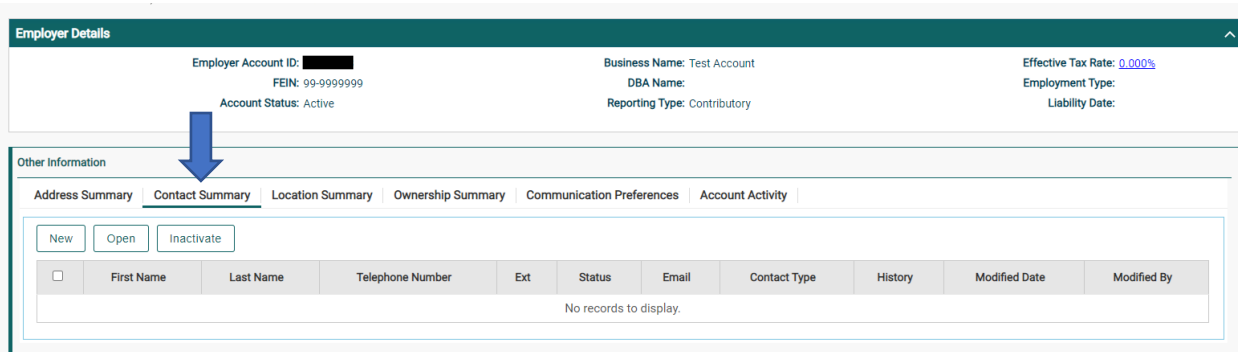
Step 2: Click on the Account Maintenance option located on the left-hand side of the screen, under Your Options:



Step 3: Click on the Employer Maintenance link:



Step 4: Click on the Contact Summary tab:



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

The screenshot shows the 'Employer Details' section with the following information:

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

The 'Other Information' section is expanded, showing tabs for Address Summary, Contact Summary, Location Summary, Ownership Summary, Communication Preferences, and Account Activity. Below the tabs are buttons for 'New', 'Open', and 'Inactivate'. A blue arrow points to the 'New' button. Below the buttons is a table with columns: First Name, Last Name, Telephone Number, Ext, Status, Email, Contact Type, History, Modified Date, and Modified By. The table is currently empty with the text '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.

The screenshot shows the 'Contact Information' section. A dropdown menu for 'Contact Type Code' is open, displaying a list of options: Accounting, Benefits, CPA, Human Resources, Legal, Other, Payroll, and Tax Consultant. A blue arrow points to the 'Benefits' option. The form includes fields for First Name, Address Line 1, City, ZIP/Postal Code, Email, Telephone Number, and Ext. There is also a 'Validate Address' button. On the right side, there are fields for Last Name, Address Line 2, State (set to South Carolina), Country (set to United States of America), and Alternate Telephone Number. A 'Save' button is located at the top left.

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

The screenshot shows the 'Contact Information' section with red asterisks next to the required fields: First Name, Address Line 1, City, ZIP/Postal Code, Email, Telephone Number, Last Name, Address Line 2, State, and Country. Blue arrows point to each of these fields. The 'Contact Type Code' dropdown is now closed. The 'Save' button is at the top left.

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

The screenshot shows the 'Contact Information' section of a form. The 'Validate Address' button is highlighted with a blue arrow pointing to it from the left. The form contains the following fields:

- 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: [Empty]
- Last Name: DEW
- Address Line 2: [Empty]
- State: South Carolina
- Country: United States of America
- Alternate Telephone Number: [Empty]

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

The screenshot shows a pop-up window titled 'Address Suggestions'. It contains a table with the following data:

Address1	Address2	City	IblnFirstRecord	State	Zip
1550 Gadsden St		Columbia	true	SC	29202

A blue arrow points to the highlighted address '1550 Gadsden St' in the first row of the table. The pop-up also includes a close button (X) and a header 'Choose address from below recommendations'. Below the table, there is an 'Email' field with the value 'SCDEW@TestAccount.com'.

Step 10: Click Save

The screenshot shows the 'Contact Information' section of the form, identical to the one in Step 8. A blue arrow points to the 'Save' button located at the top left of the form.

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

Employer Details

Employer Account ID: [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	Active	SCDEW@TestAccount.com	Tax Consultant		09/21/2021	[REDACTED]

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

Employer Details

Employer Account ID: [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 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:

Employer Details

Employer Account ID: [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	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: [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](#)

<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	History	09/21/2021	[REDACTED]

