Agent- User Guide

The Minnesota Unemployment Insurance (UI) Program produced this step-by-step user guide to assist agents manage both their account and their clients' accounts online.

For details about agents and unemployment insurance, refer to the Minnesota Unemployment Insurance Web site at **www.uimn.org** and click on **Agent Information**.

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Agent Registration

The first step to gaining secure access to your clients' Minnesota Unemployment Insurance (UI) Employer Self-Service account information is to complete the agent registration process.

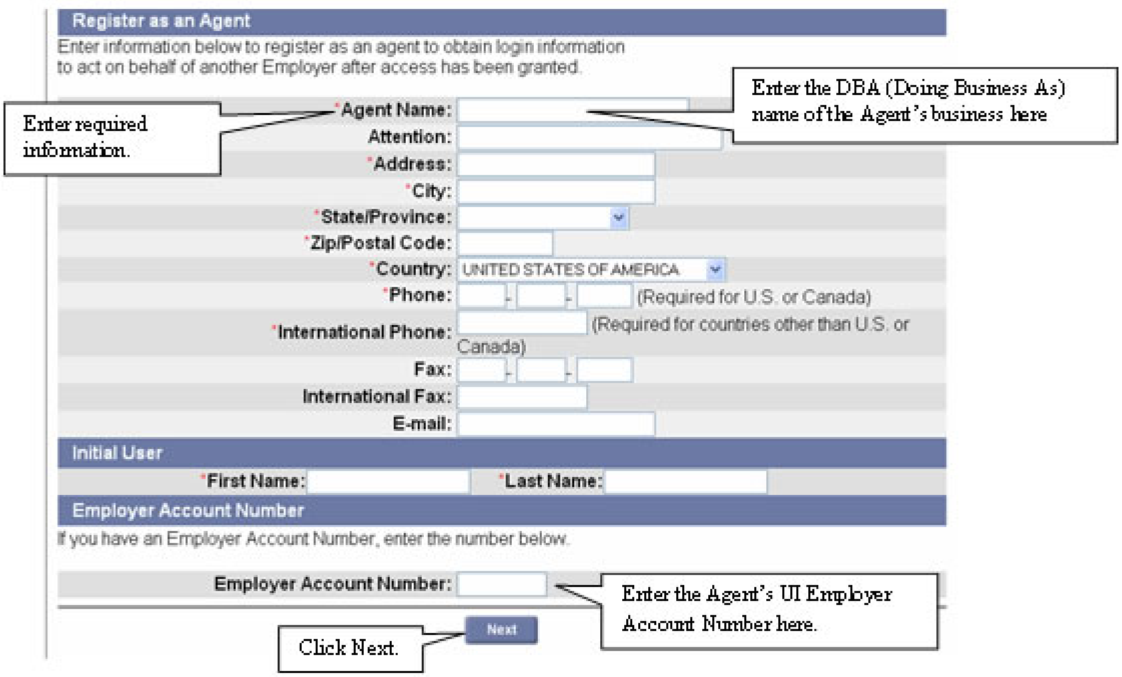
NOTE: Agents must register:

- **as an agent** with the Minnesota UI Program, to do business on behalf of their client.
- **for a UI Employer Account**, if they have employees in Minnesota.

Step-by-step instructions to register as an agent:

1. Go to the Minnesota Unemployment Insurance Web site at: **www.uimn.org**
2. Click on **Agent Login**.
3. Click on **Agent Registration**.
4. Fill in requested information on the *Register as an Agent* screen, click **Next**. *(See example # 1)*

   NOTE: Agents who have an employer account number should enter the number in the box provided.



Example #1

System Administrator

The person completing the registration process for an Unemployment Insurance (UI) agent account automatically becomes the System Administrator for the agent. The System Administrator:

- can create user IDs for other agent users.
- will have secure access (along with any other agent users created) to the account information of all clients who have authorized access and assigned the proper role(s) to your agent ID.

Once registered for an agent account, the next step is to have your client(s) authorize you as their agent. Step-by-step instructions to provide to your client(s) are available in the *Agent Authorization/Assign User Roles* section of the Employer Self-Service System User Guide.

NOTE: Agents **should** log in to their agent account to conduct UI business on behalf of their client(s); they **should not** log in to their client's employer account to conduct such business.

Agent Login

To log in to the Minnesota Unemployment Insurance (UI) online Employer Self-Service System as an agent, you need a User ID and Password.

Contact a UI Customer Service Representative at 651-296-6141 (select option 4), if you:

- are the System Administrator for the agent account, and have forgotten your User ID and/or password; or,
- no longer have a System Administrator and have forgotten your User ID or password.

  NOTE: Contact your agent account System Administrator if you are an Agent User who needs access assigned or have forgotten your User ID or Password.

Step-by-step instructions to log in to the online Employer Self-Service System:

1. Go to the Minnesota Unemployment Insurance (UI) Web site at: **www.uimn.org**
2. Click on **Agent Login**.
3. Enter your User ID and Password, click **Login**.

Account Maintenance

Address Information

Step-by-step instructions to change an agent's Benefits Account or Benefits Paid Charges mailing address or to create a Primary address:

1. After logging in to your agent account, on *My Home Page*, click on **Account Maintenance**.
2. Click on **Address Information**.
3. Under the 'Address Type' column, select the link for the address type to be changed.
4. Change address information, click **Save**.
5. The *Address Validation* screen or *Confirm Mailing Address* screen will display. If the:
   - *Address Validation* screen displays - validate the address, click **Next**.
   - *Confirm Mailing Address* screen displays, click **Submit**.

   NOTE: Clicking the checkboxes under 'Additional Address Types' on the *Confirm Mailing Address* screen causes related address types to share the address just entered.
6. The *Address Information* screen will display indicating that your information has been saved.

Correspondence Preference

Delivery Method

Step-by-step instructions for agents to change their correspondence delivery method:

1. After logging in to your agent account, on *My Home Page*, click on **Correspondence Preferences**.
2. Click on **Delivery Method**.
3. Select a delivery method from the drop down menu, click **Save**.
4. The *Correspondence Delivery Method* screen displays indicating your change has been saved.

Payment Information

Download Payment Due File

Agents can download a payment due file to their computer to determine the amount due on their clients' accounts (view file format). Once the file has been downloaded, it can be modified by the agent user and then uploaded using the Self-Service System to make a single payment (i.e. from the agent's bank account) for all of their clients.

For instruction on making a single payment, see *Upload payment application file*.

Step-by-step instructions for agents to download a payment due file:

1. After logging in to your agent account, on *My Home Page*, click on **Payment Information**.
2. Click on **Download Payment Due File**.
3. A dialogue box will display asking "Do you want to open or save this file?", click **Open**.

   NOTE: If you click 'Save', a payment due file will be saved to your computer.

4. The *Payment Due* file will display listing all of the agent's clients.

Make Pending Payment

Step-by-step instructions for agents to make a payment for their clients when there is a pending payment:

1. After logging in to your agent account, on *My Home Page*, click on **Payment Information**.
2. Click on **Make Payment**.
3. The *Payment Options* screen will display (see example #2). Select:

   - ***Make full payment for all assigned employers*** – to make a single payment from the agent's bank account.

     4. Enter your bank account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
     5. Review payment information, click **Submit**.
     6. The *Receipt of Payment* screen will display.

   - ***Make payment based on previously submitted information*** – *to make* a single payment from the agent's bank account in the amount determined by the agent.

     4. Enter your banking account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
     5. Review payment information, click **Submit**.
     6. The *Receipt of Payment* screen will display.

   - ***Edit previously submitted information*** – to edit a payment on a clients account.

     4. Select the **Pay All Employer Accounts in Full** link if you choose to pay the entire amount due on each employer account or enter/edit the payment amount for each employer, click **Make Payment**.

        NOTE:

        - Under *Search Payment Details,* you can:

          1. refine your search to look for one specific employer by entering the employer account number or employer name, click **Search**; or,
          2. check the box *Display Accounts with Debits Only,* to view only your clients that have an amount due on their account, click **Search**.

        - If there are multiple pages, click **Save** before moving to the next page.

5. Enter your banking account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
6. Review payment information, click **Submit**.
7. The *Receipt of payment* screen will display.

- ***Delete previously submitted information*:**

4. The following **warning message** will display: "all unsubmitted payment details based on payment application file uploads and online edits $$ will be lost", click **Submit**.
5. The *Agent Information* screen will display indicating all unsubmitted payment information has been deleted.

- ***Upload payment application file*:**

4. Click on **Browse** to locate your file.
5. Select the name of the file to be uploaded, click **Open**. The title of your wage detail file should appear in the 'Browse box', click **Submit**.
6. Review uploaded information, click **Make Payment**.
7. Enter your banking account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
8. Review electronic check information, click **Submit**.
9. The *Receipt of payment* screen will display.

Example # 2

Make a Non Pending Payment

Step-by-step instructions for agents to make a payment for their clients when there is not a pending payment:

1. After logging in to your agent account, on *My Home Page*, click on **Payment Information**.
2. Click on **Make Payment**.
3. The *Payment Options* screen will display. Select:

- ***Make full payment for all assigned employers*** – to make a single payment from the agent's bank account.

4. Enter your bank account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
5. Review payment information, click **Submit**.
6. The *Receipt of Payment* screen will display.

- ***Enter payment information online*:**

  4. Click on **Enter Payment Information Online**.
  5. The next page displays. You can:

     - search for employers by their account number or employer name. For a listing of all employers, leave search parameters blank, click **Search**; or,
     - make payments for:

       1. a specific employer:
          a. select the **employer's name** link under the 'Employer Name' column;
          b. click **Make Payment**, on the next screen.
       2. each employer:

          a. enter the amount to be paid for each employer in the corresponding 'Payment Amount' column; or,
          b. click on the **Pay All Employer Accounts In Full** link.

          NOTE: If multiple pages are available, click **Save** before moving to the next page.

  6. Click on **Make Payment**.
  7. Enter your bank account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
  8. Review payment information, click **Submit**.
  9. The *Receipt of payment* screen will display.

- ***Download payment due file*:**

  4. The following ***warning message*** will display: "all unsubmitted payment details based on payment application file uploads and online edits $$ will be lost", click **Submit**.
  5. The *Agent Information* screen will display indicating all unsubmitted payment information has been deleted.

- ***Upload payment application file*:**

  4. Click on **Browse** to locate your file.
  5. Select the name of the file to be uploaded, click **Open**. The title of your wage detail file should appear in the 'Browse box', click **Submit**.
  6. Review uploaded information, click **Make Payment**.
  7. Enter your banking account information in the 'Routing Transit' and 'Bank Account Number' fields. Enter the 'Payment Effective Date'; select the **Account Type** from drop down menu, click **Next**.
  8. Review electronic check information, click **Submit**.
  9. The *Receipt of payment* screen will display.

Cancel Pending Payments

Step-by-step instructions to cancel a pending payment:

1. After logging in to your agent account, on *My Home Page*, click on **Payment Information**.
2. Click on **Pending Payments**.
3. Select the **Payment Confirmation Number** link of the payment to be canceled.
4. Enter the reason why the payment is being canceled, click **Submit**.
5. A screen will display indicating payment has been canceled.

Review Employer Details

Step-by-step instructions to review employer balance due or credit amount available:

1. After logging in to your agent account, on *My Home Page*, click on **Payment Information**.
2. Click on **Review Employer Details**.
3. Enter the employer's name or account number, click **Search**.

   NOTE: To search only for accounts that have debt due, select the check box **Display Accounts With Debits Only**.

4. Under the 'Employer Name' column, select the employer you want to review.
5. The *Account Summary Statement Period* screen will display, showing the total balance due or credit available on the account. You can choose to make a payment at this time by clicking on **Make Payment** and completing the following steps:

   1. Enter: the payment amount; your bank account information in the 'Routing Transit Number' and 'Bank Account Number' fields; the Payment Effective Date; then select the '**Account Type**' from the drop down menu, click **Next**.
   2. Confirm banking and payment information, click **Submit**.
   3. The *Receipt of Payment* screen will display.

Review Payments

Step-by-step instructions to review payments:

1. After logging in to your agent account, on *My Home Page*, click on **Payment Information**.
2. Click on **Review Payments**.
3. Enter search payment parameters or leave fields blank to view all payments, click **Search**.
4. Under the 'Confirmation Number' column, select the **Confirmation Number** link to review the payment.
5. The *Employer Payment Items* screen will display, showing detailed payment information. You can choose to modify a payment at this time by clicking on **Modify** and completing the following steps:

   1. Review payment information and make any necessary changes. Enter a reason for the change in the 'Notes' text box, click **Save**.
   2. Click **Submit**.

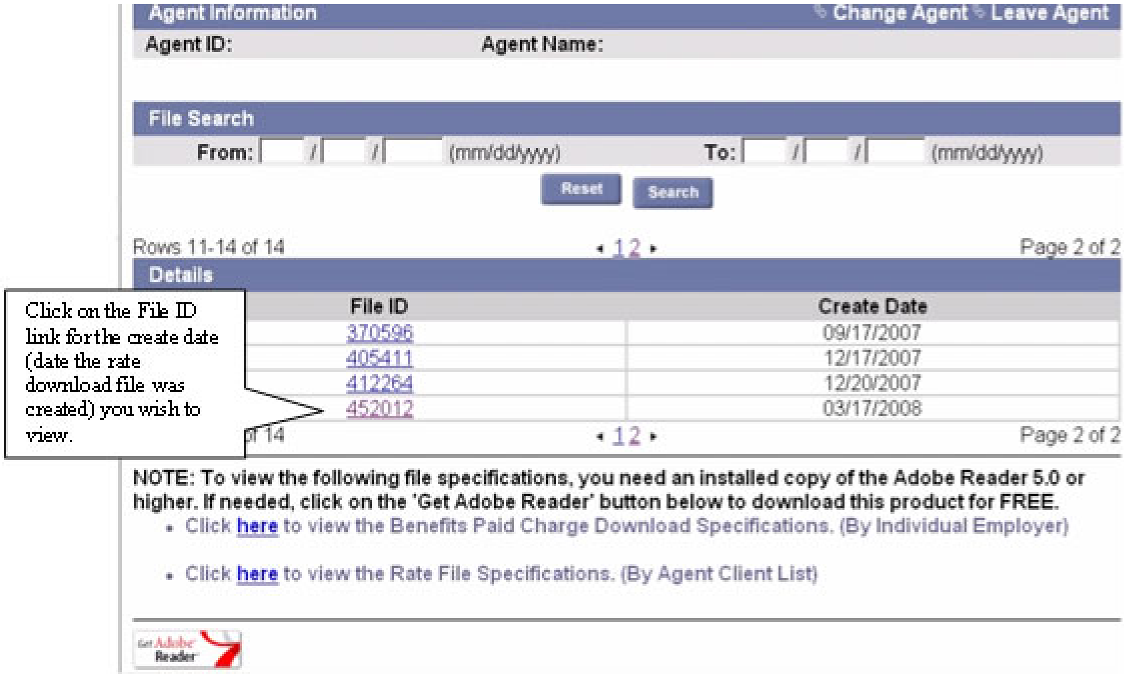
   NOTE: A change in the payment amount may affect the account balances for all employers associated with this payment.

Searches

Client/Rate Download

Step-by-step instructions to search for a file containing all of your clients tax rates:

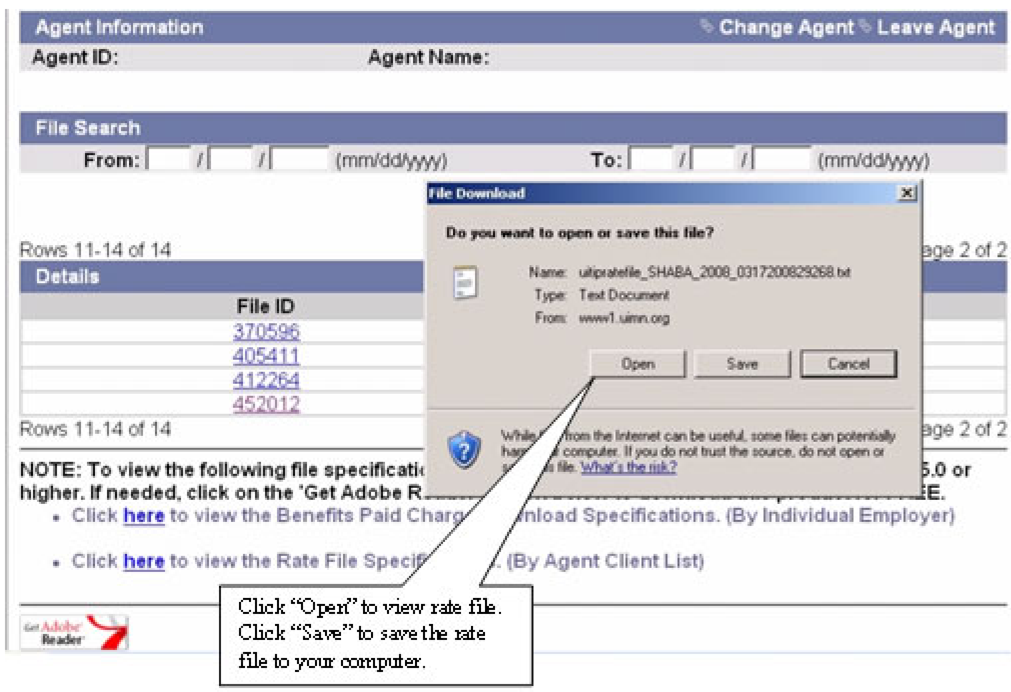
1. After logging in to your agent account, on *My Home Page*, click on **Searches**.
2. Click on **Client/Rate Download**.
3. Enter date parameters to limit your search or leave date fields blank to search for all employer client/rate files, click **Search**.
4. Select the **File ID** link for the create date (date the rate download file was created) you choose to view. (See example #3)



Example #3

5. A dialogue box will display asking “Do you want to open or save this file?”, click **Open**. (See example #4)

   NOTE: If you click ‘Save’ the rate download file will be saved to your computer.



Example #4

6. The rate file of the selected employers will display.

The Agent Rate File format is available at:

www.uimn.org/tax/system/Employer_Rates_Download_Agents_Only.pdf

Employer Search

Step-by-step instructions to search for a client in an agent account:

1. After logging in to your agent account, on *My Home Page*, click on **Searches**.
2. Click on **Employer Search**.
3. Enter the employer's name or account number. Select the desired role to search from the drop down menu, or leave search parameters blank to search for all clients, click **Search**.
4. Select the employer's name to be viewed.
5. The selected employer's *Employer Home* page will display.

Tax and Wage Detail Reporting

Submit Agent File

Step-by-step instructions for an agent to submit a wage detail file for their clients:

1. After logging in to your agent account, on *My Home Page*, click on **Tax and Wage Detail Reporting**.
2. Click on **Submit Agent File**.
3. Select the radio button for the file type to be submitted, click **Next**.
4. Click **Browse** to locate your file. Select the name of the file to be uploaded, click **Open**. The title of your wage detail file should appear in the 'Browse' box, click **Next**.

   NOTE: If your wage detail file has:

   - **less than** 5 kilobytes of data, continue with the next step.
   - **more than** 5 kilobytes of data, your file will go to batch (offline) processing and a message will display to check the processing results at a later time.

   For instructions on viewing the status of the wage detail submission, see *View Submission History*.

5. The next screen will show whether or not there are errors in the file. If the file:

   - **has errors**, the line number, error description and error type will display. If errors do exist, select the **Reject File** radio button, click **Next**. Go back and make the necessary corrections to your original file located on your computer; then resubmit by starting over with Step1.

     NOTE: Fatal record errors will not be stored or used in calculations. They must be corrected for an accurate submission. Non-Fatal record errors will be stored and used in calculations. It is recommended to correct the errors for an accurate submission.

   - **does not have errors**, select 'Accept File' radio button, click **Next**.

6. The *Number of Employees Employed on the 12th of Each Month* screen displays showing the total number of employees employed on the 12th of each month. The totals are displayed for each reporting unit number and for each month of the quarter. Corrections can be made to the totals on this screen, click **Next**.
7. *Process and Calculate Taxes Due Summary* screen displays; if satisfied, click **Next**.
8. The *Wage Detail Report Submission Confirmation* screen displays a confirmation number. You can choose to make a payment at this time by clicking on **Make Payment** and completing requested information.

   For instructions on making a payment, see Payment Information.

View History

Step-by-step instructions to view previously submitted wage detail information:

1. After logging in to your agent account, on *My Home Page*, click on **Tax and Wage Detail Reporting**.
2. Click on **View History**.
3. Under 'View History Search', enter:

   - **Nothing** - to list all wage detail submissions for all employers submitted by this account.
   - **An Employer ID** - to display only wage detail submission for that employer.
   - **Year and quarter** - to narrow the search.

   Click **Search**.

4. Under the 'Employer Account Number' column, select the **employer account number** link for which you want to view the wage detail information.
5. The *Wage Detail History Search* screen displays. You have the option to print the wage detail history, view employees employed on the 12th of the month and view quarterly wages, UI taxes, assessments and fees. To search for:

   - **year and quarter information** - click **Search** without entering any search parameters.
   - **individual wage detail history** - enter an individual's Social Security number, last name, and first name; click **Search**.

   NOTE:

   - **Files containing more than 100 records** - the search may be limited by entering only the first letter of a last name in the 'Last Name' field (i.e. entering only the letter 'A' will yield all of the wage records for employees whose last names begin with 'A'.

View Submission History

Step-by-step instructions to view wage detail submission history:

1. After logging in to your agent account, on *My Home Page*, click on **Tax and Wage Detail Reporting**.
2. Click on **View Submission History**.
3. The *Wage Detail Submission History Search* screen will display. You can enter a date parameter to narrow the search or leave blank for a complete search, click **Search**.
4. Under the 'Search Results' section, the status of the wage detail submission file will display. (See example # 5)

   NOTE:

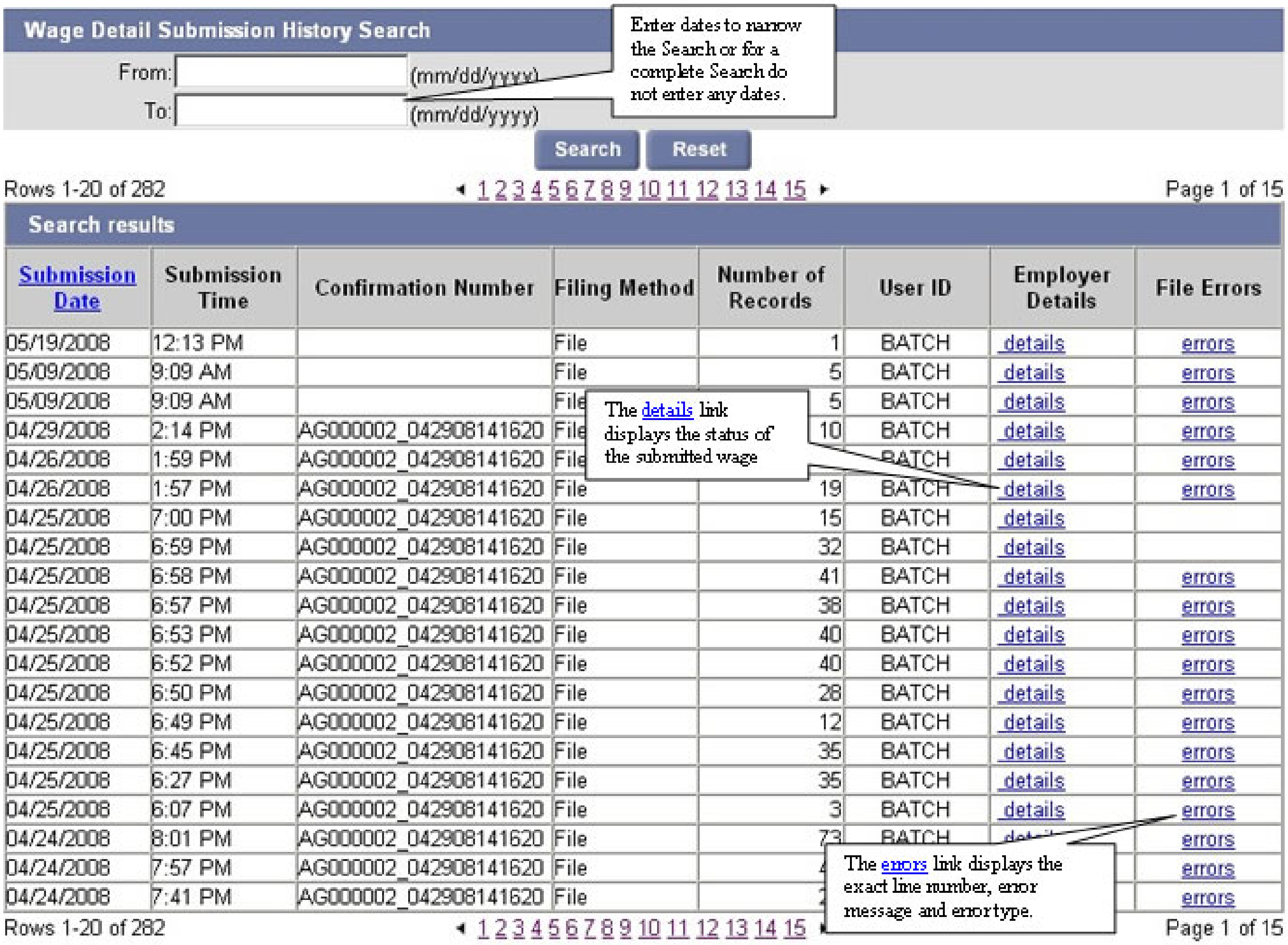
   - Employer details and file errors can be viewed for each file.

     1. The **details** link displays the status of the wage detail report submitted.
     2. The **errors** link displays a screen that indicates the exact line of the wage detail submission that had an error and if it was a fatal or non-fatal error.

        - **Fatal Errors:** A file with fewer than 50 fatal errors will process; however, the records (or lines) having fatal errors will not. A file with 50 or more fatal errors will cause the entire file to fail.
        - **Non-Fatal Errors:** A non-fatal error caused by invalid Social Security numbers should always be corrected; otherwise, the Employer Self-Service System will incorrectly calculate the taxable wages.

          IMPORTANT: Each record with an invalid or missing Social Security number will be assigned a unique 'fictitious' number – each of these 'fictitious' numbers will be assigned its own taxable maximum wage base – therefore, an employee with one or more 'fictitious' numbers will generate tax on wages up to the taxable maximum wage base for each number.

- When a file is submitted with multiple employers, if there is an error on one or more of the files, the File Errors column will display an 'errors' link for all the employer accounts in that file.



Submission Date	Submission Time	Confirmation Number	Filing Method	Number of Records	User ID	Employer Details	File Errors
05/19/2008	12:13 PM		File	1	BATCH	details	errors
05/09/2008	9:09 AM		File	5	BATCH	details	errors
05/09/2008	9:09 AM		File	5	BATCH	details	errors
04/29/2008	2:14 PM	AG000002_042908141620	File	10	BATCH	details	errors
04/26/2008	1:59 PM	AG000002_042908141620	File	[illegible]	BATCH	details	errors
04/26/2008	1:57 PM	AG000002_042908141620	File	19	BATCH	details	errors
04/25/2008	7:00 PM	AG000002_042908141620	File	15	BATCH	details	
04/25/2008	6:59 PM	AG000002_042908141620	File	32	BATCH	details	
04/25/2008	6:58 PM	AG000002_042908141620	File	41	BATCH	details	errors
04/25/2008	6:57 PM	AG000002_042908141620	File	38	BATCH	details	errors
04/25/2008	6:53 PM	AG000002_042908141620	File	40	BATCH	details	errors
04/25/2008	6:52 PM	AG000002_042908141620	File	40	BATCH	details	errors
04/25/2008	6:50 PM	AG000002_042908141620	File	28	BATCH	details	errors
04/25/2008	6:49 PM	AG000002_042908141620	File	12	BATCH	details	errors
04/25/2008	6:45 PM	AG000002_042908141620	File	35	BATCH	details	errors
04/25/2008	6:27 PM	AG000002_042908141620	File	35	BATCH	details	errors
04/25/2008	6:07 PM	AG000002_042908141620	File	3	BATCH	details	errors
04/24/2008	8:01 PM	AG000002_042908141620	File	73	BATCH	[illegible]	errors
04/24/2008	7:57 PM	AG000002_042908141620	File	[illegible]	[illegible]	[illegible]	errors
04/24/2008	7:41 PM	AG000002_042908141620	File	[illegible]	[illegible]	[illegible]	errors

Example #5

User Maintenance

Agent Roles

Step-by-step instructions to view or change agent roles:

1. After logging in to your agent account, on *My Home Page*, click on **User Maintenance**.
2. Click on **Agent Roles**.
3. The *Agent User Search* screen will display, you can click on **Search** to view who has been assigned what role(s); or, click on **New** to assign the Agent User or System Administrator function to the new user.

   - If **Search** was clicked:

     1. Select the link in the User ID column for the agent information to view/update.
     2. Click **Update** to terminate the user, assign passwords or to add/remove roles.
     3. Make desired changes, click **Save**.

   - If **New** was clicked:

     1. Enter the required agent user information, click **Save**.

System Availability and System Tips

Availability of the Employer Self-Service System

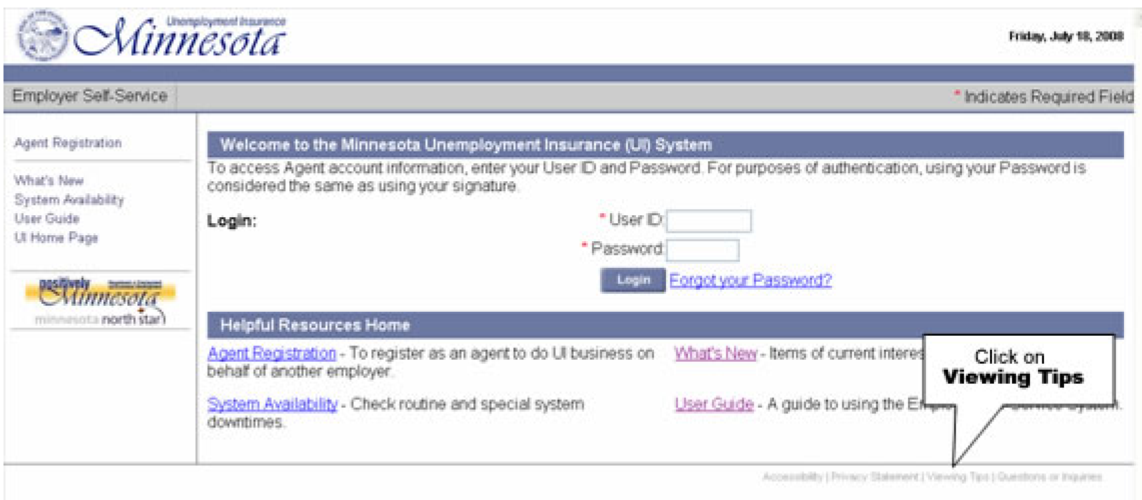
The following is a list of times when the Minnesota Unemployment Insurance online Employer Self-Service System is routinely not available; all times listed are Central Time (unless otherwise noted), and approximate:

- Monday through Friday, 6:30 p.m. to 7:10 p.m., ALL system functions are unavailable.
- Monday through Friday, 7:10 p.m. to 11:00 p.m., Employer Account Activation is unavailable. *There is also a half-hour "window" during this time when wage detail is view only.*
- Tuesday through Saturday, 1:00 a.m. to 1:30 a.m., ALL system functions are unavailable.
- Weekends - the system is generally available during the daytime and evening hours. However, there is maintenance that is done in the late evening and early morning hours that makes the entire system unavailable.

Click on **System Availability** on the *Employer Login* screen to view a list of additional system downtimes.

Web Page Setting, Viewing Tips and Instructions

Web Page Setting, Viewing Tips and Instructions are available on the *Minnesota Unemployment Insurance Employer Self-Service System Login* screen, by clicking on **Viewing Tips**. (See example #6)



Example #6

Agents Performing Employer Procedures

Agents can perform many of the same procedures as an employer if the employer assigns the proper role(s) to the agent. Once the proper role has been assigned, and the agent has accessed the employer's account (see Employer Search) from their agent account, the procedure may be performed. The steps to complete employer procedures are in the Employer Self-Service System User Guide. The roles an employer can assign to their agent to complete a desired procedure are:

Account Maintenance View Only: Allows agent users to view the employer's account profile, mailing addresses, owner/officer and latest tax rate notice. This role will need to be assigned to at least one reporting unit.

Account Maintenance Update and Submit: Allows agent users to change the employer's legal name, legal entity, update owner/officer and reporting unit information, elect and terminate election of coverage, initiate an acquisition, register as an agent, update mailing addresses, and view the latest tax rate notice. This role will need to be assigned to at least one reporting unit.

Benefit Account View Only: Allows agent users to view Benefit Account and Benefits Paid Charge information. The role provides access to calendar year summary and detail data, fiscal year summary data with merger, sale, acquisition and tax rate buydown history.

Benefit Account Update and Submit: Allows agent users to view Benefit Account and Benefits Paid Charge information. The role provides access to calendar year summary and detail data, fiscal year summary data with merger, sale, acquisition and tax rate buydown history; and, access to a quarterly Benefits Paid Charge download detail file.

Benefits Paid Charges View Only: Allows agent users to view Benefit Account and Benefits Paid Charge information. The role provides access to calendar year summary and detail data, fiscal year summary data with merger, sale, acquisition and tax rate buydown history.

Benefits Paid Charges Update and Submit: Allows agent users to view Benefit Account and Benefits Paid Charge information. The role provides access to calendar year summary and detail data, fiscal year summary data with merger, sale, acquisition and tax rate buydown history; and, access to a quarterly Benefits Paid Charge download detail file.

Tax Payment View Only: Allows agent users to view account summary information, review payments, pending payments, and recertify taxes paid. This role will need to be assigned to at least one reporting unit.

Tax Payment Update and Submit: Allows agent users to view account summary information, review payments, pending payments, recertify taxes paid, submit payments, forecast annual taxes due, and process field audit and compromise workflow items. This role will need to be assigned to at least one reporting unit.

Wage Detail View Only: Allows agent users to view wage detail report history and submission history information. This role will need to be assigned to at least one reporting unit.