Third Party Administrator

LaborFirst User Manual

Third Party Administrator LaborFirst User Manual
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Overview

We will now start working with some of the most important components of LaborFirst.

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- **Getting Started:**
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    - Signing into LaborFirst for the first time
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    - Contacting the Help Desk
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Note: The TPA Portal is a window into the Employer Self-Service Portal. For specific information about the Employer Self-Service Portal functions and navigation, please see the Employer User Guide.

Before You Start
Before you can sign in to LaborFirst, you must complete two activities.

Step One: Are You a New Business Operating in Delaware?
If your business is registered in Delaware One Stop, proceed to Step 2.
If you haven't registered your business in Delaware One Stop, please visit One Stop.
If you need **help**, visit the One Stop Contact page.

Step Two: Everyone must establish State of Delaware sign-in credentials. Go Here.
Third Party Administrator or Professional Employer Organization? **Go Here**.
For **Help**, written instructions are available **here**, or you can watch this **video**.
If you are unable to complete the credentialing process, please call 302-761-8375.

Have you completed the steps above? You can now access **LaborFirst** from the **LaborFirst tile** on your MyDelaware dashboard.

My Delaware LaborFirst Tile

Note: If a TPA is operating in the State of Delaware as an employer, they will also need to complete Employer Registration in LaborFirst. If you need more information or training materials? Documentation specifically developed for Employers, TPAs, and PEOs are available from the LaborFirst home page, then select the appropriate tile for your business type.
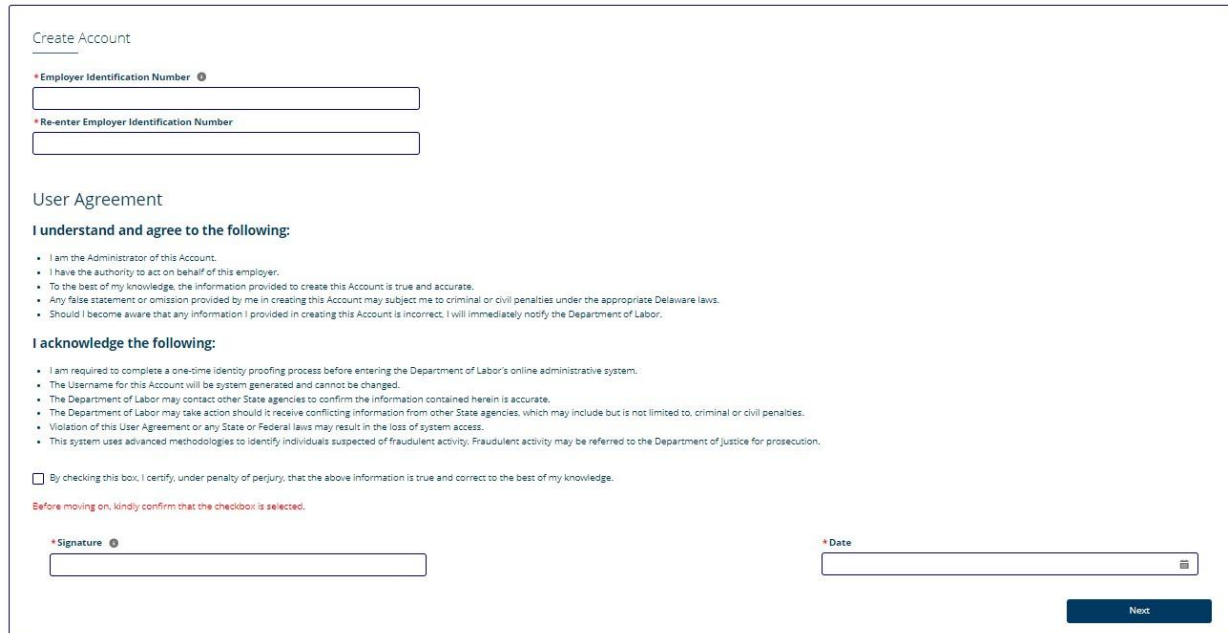
Registration

Third-Party Administrator (TPA) Registration

Once a person has established their State of Delaware sign in credentials and selects the LaborFirst tile from MyDelaware.gov (see the prior page), they can begin working in LaborFirst.

This section of the user manual provides the steps for a Third-Party Administrator (TPA) (and Professional Employer Organization – PEOs) to complete LaborFirst registration. A TPA is an organization that provides operational services such as claims processing and employee benefits management under contract to another company.

The 'Create Account' screen is the first step in the TPA Registration process after a successful sign in if someone has not already registered the TPA in LaborFirst. This screen asks the TPA to enter and reenter their Employer Identification Number. Unlike employer business registration, the TPA's FEIN does not need to match the FEIN registered in Delaware One Stop. Additionally, this screen contains a User Agreement outlining key acknowledgments to which the TPA must agree to proceed. The TPA will utilize the checkbox to certify that the above information is true and correct to the best of their knowledge, sign and date, and select **Next** to proceed with the registration process.
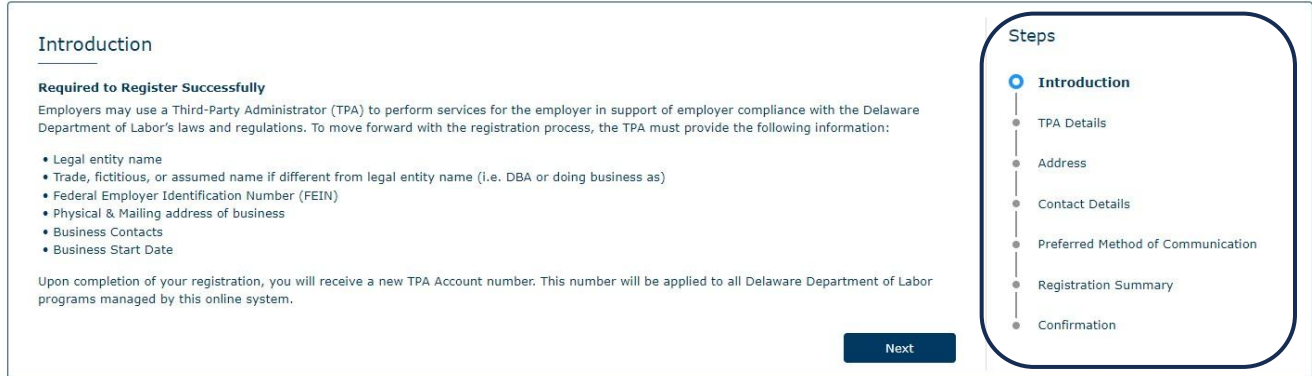
Create Account Screen

The 'Introduction' screen is the first screen in the TPA Registration process and highlights the information required to complete registration.

Introduction Screen

Each screen in the TPA registration process includes a 'Steps' status bar in the right pane. After the initial screen, **Previous** and **Next** buttons are available at the bottom of each screen to move back and forth between screens. If the person registering exits the system before completing the registration process, all previously entered information is saved and the registration status will be incomplete. When the TPA later signs in, they are presented with the 'Introduction' screen. However, previously entered information will be saved as they navigate the registration process. The TPA may make updates, if necessary.

Note: Incomplete registrations will be purged from LaborFirst if not completed within 15 days.

The 'TPA Details' screen is the next step in the process and is accessed after selecting **Next** on the 'Introduction' screen. Throughout the registration process, labels marked with a red asterisk are required to proceed to the next step in the registration process. For all steps in the registration process, enter the required data, then select **Next**.

TPA Details Screen

The 'Address' screen is the next step in the registration process. At least one physical address and one mailing address are required. Select the down arrow, then **Edit** to launch the 'Mailing Address' window.

Address Screen

The first field in the 'Mailing Address' window is a search field, which utilizes an address broker to allow the person registering to start typing the address and select from a list of results. The TPA will select their mailing address, and all additional fields on the screen will populate. However, if the TPA cannot locate their address utilizing the search field, they may select **Address not found** to manually enter their address. Once the mailing address has been entered, select **Save**.

Mailing Address
Search
[ ] Address not found
* Country
United States
* Address Line 1 ⓘ   * City
* State   * Zip Code
Delaware
Cancel   Save

Mailing Address Screen

If the person registering indicates that their physical address is different from their mailing address, an additional address field will be dynamically displayed on the screen for the physical location. Follow the steps previously mentioned to enter a new physical address.

If the person registering answers "Yes" to the question "Would you like to add additional locations?" then 'Additional Locations' will appear in the 'Steps' pane on the right. To enter a new location, select **+New** to launch the 'Additional Locations' window.

TPA Additional Locations Screen

The 'Locations' screen allows the person registering to enter address information for additional physical locations. Because of this, the 'Address Type' field is prepopulated to 'Physical Location' in a read-only format. Enter the address details as requested, then select **Save**. Select **Proceed** to go to the next screen.

Locations Window

'Contacts' is the next step in the process. To proceed, you must register one contact. Enter the registration contact's information in the fields on the screen, then select **Next** to continue.

TPA Contact Details Screen

'Preferred Method of Communication' is the next step. The Preferred Contact Method defaults to email in a read-only format; however, the person registering can edit the email provided as needed. Enter the requisite information and then select **Next**.

Note: A registration email is sent to the email entered upon successful completion of the registration process.

Preferred Method of Communication Screen

A 'Registration Summary' allows the person registering to review the information entered during the registration process. Though the information on this screen is read-only, the person registering may use **Previous** to toggle back through the screens to make any necessary corrections. Review the information and, if accurate, read and agree to the disclosure, sign and date, then select **Next** to complete the registration.

Registration Summary Screen

Upon successful completion of the registration process, the 'Confirmation' screen appears and an email is sent to the registration contact. LaborFirst provides the TPA Account Number and Confirmation Number for reference. Select **Proceed** to return to the 'TPA Home Page'.

Registration Confirmation Screen

TPA Portal General Navigation

TPA Portal Page

After signing in, the TPA user will land on the TPA Portal Page. From here a user can access their Home Page, view Notifications, use the Profile Icon, or use the 'Menu' (three lines in the upper left corner) to move to various screens.
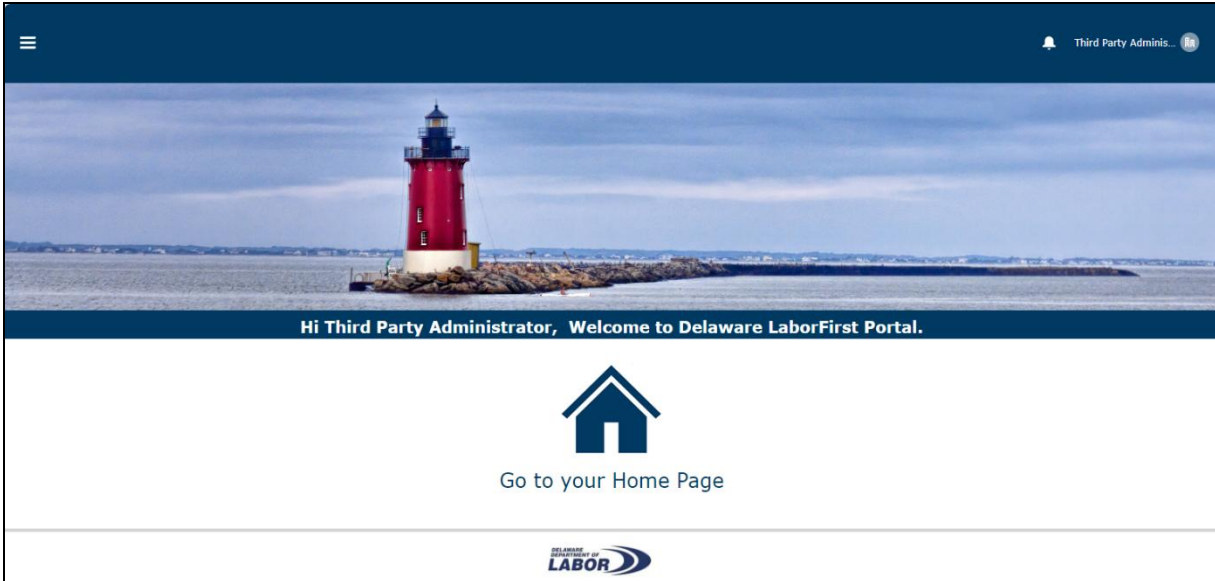
TPA Portal Page

TPA Home Screen

Select **Go to your Home Page** to move to the screen shown below. Here, you can view the linked business accounts. Entity Relationships are dynamically displayed once the employer and TPA relationship is established.

By selecting the **Employer**, the TPA will be navigated to the employer's account and will may be able to view/edit different areas within the employer portal based on the level of access. Please review the Employer LaborFirst User Guide for more details.

TPA Home Screen

Profile Icon

The TPA Profile Icon is at the top right corner of the screen. From here, the TPA can view Account Information, Addresses, and Contacts. The Profile Icon also allows the user to **Log Out** of the system.
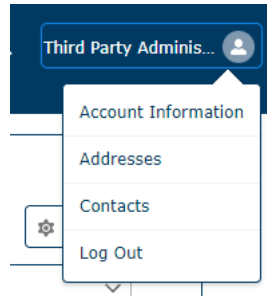
TPA Profile Icon Dropdown Menu
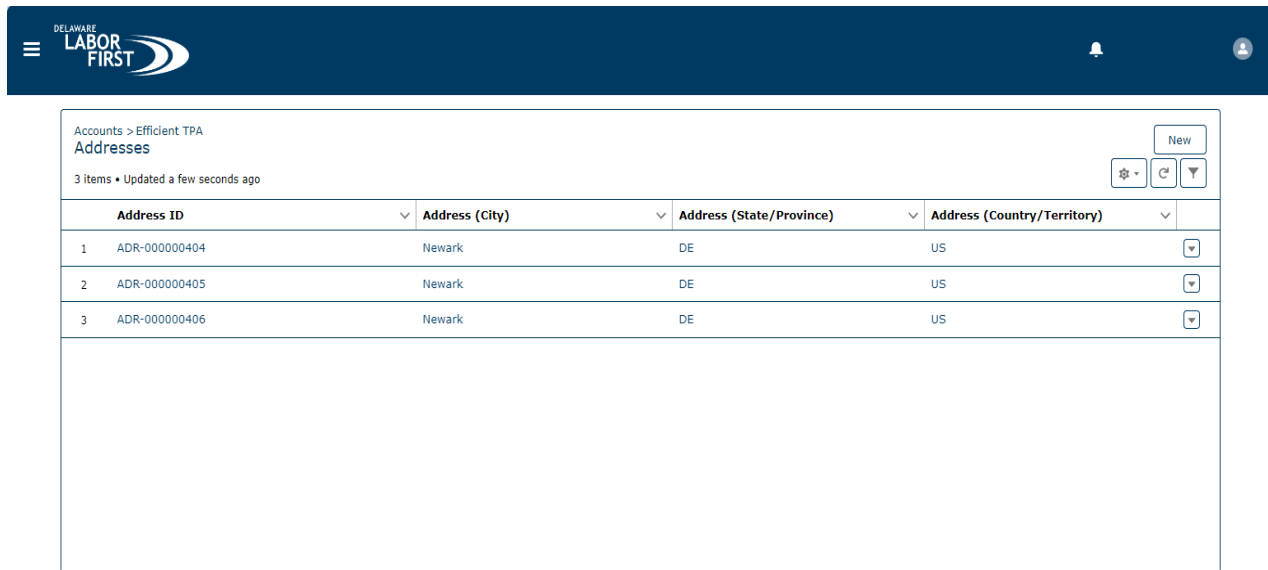
Account Information

The 'Account Information' screen allows the TPA to view their account details. The information presented is the information currently on file – Either provided at registration or updated by Delaware Department of Labor staff.

Account Information Screen

Addresses

The 'Addresses' Screen allows the TPA to view, add, edit, or delete addresses associated with the account.

Addresses Screen

To edit an address that already exists within the system, select the down arrow to the right of the address, then **Edit**. Once the desired changes are made, select **Save** to return to the 'Addresses' screen.

Edit Addresses Screen

To enter a new address, select **New** in the top right corner of the screen.

New Address Screen

Contacts

The 'Contacts' Screen allows the user to edit and/or enter to contact details to the account.

	Contact Name	Title Type	Email	Phone	
1	Third Party Administrator	Administrator	bosebih.jujopil@gotgel.org	(720) 111-2222	▾
2	Bill Billings	Registration Contact	bbillings@gmail.com	(979) 888-6666	▾

Accounts > Efficient TPA
Contacts
2 items • Sorted by Last Name • Updated a few seconds ago

New

Contacts Screen

To edit an existing contact, select the down arrow, then **Edit**.

Edit Third Party Administrator Screen

To add a new contact, select **New** in the top right corner of screen.

New Contact Screen

Log Out

At the bottom of the Profile Icon dropdown list the user can **Log Out**. This returns the user to the initial TPA sign in screen.

Menu

In the top left corner of the screen, you will see a menu icon. The menu helps you move to various screens for Account Services.


TPA Menu

Add and Manage Users

Add Additional Users

An Account Administrator can add additional users to their LaborFirst account. When additional users are set up, they are given access to the account and can engage in LaborFirst functionality based on permissions granted by the Account Administrator. Additional users who are granted administrator access have the same access as the account owner.
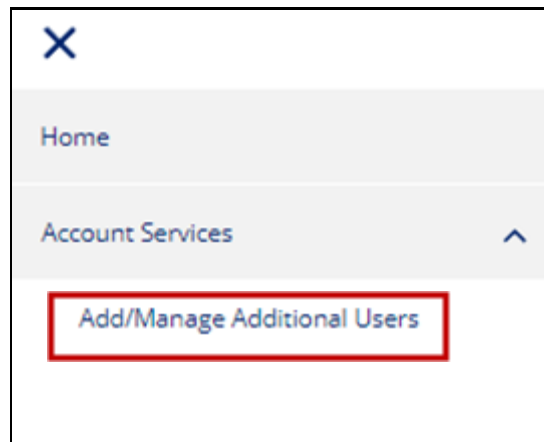
Account Services Dropdown Menu

After selecting **Add/Manage Additional Users**, the account administrator can both add new Additional Users, as well as manage relationships with existing Additional Users.

To add a new Additional User to the LaborFirst account, enter their First Name, Last Name, Email, and Phone Number. Please note: the email entered must be unique and cannot exist in LaborFirst.

Upon selecting 'Save', an email is sent to the respective person registering inviting them to create a State of Delaware account on My.Delaware.gov.

Upon selecting the link in the email, the person registering is prompted to create an account on My.Delaware.gov. (For details on obtaining Delaware state sign in credentials, please visit the LaborFirst website or see page 2 in this document.)

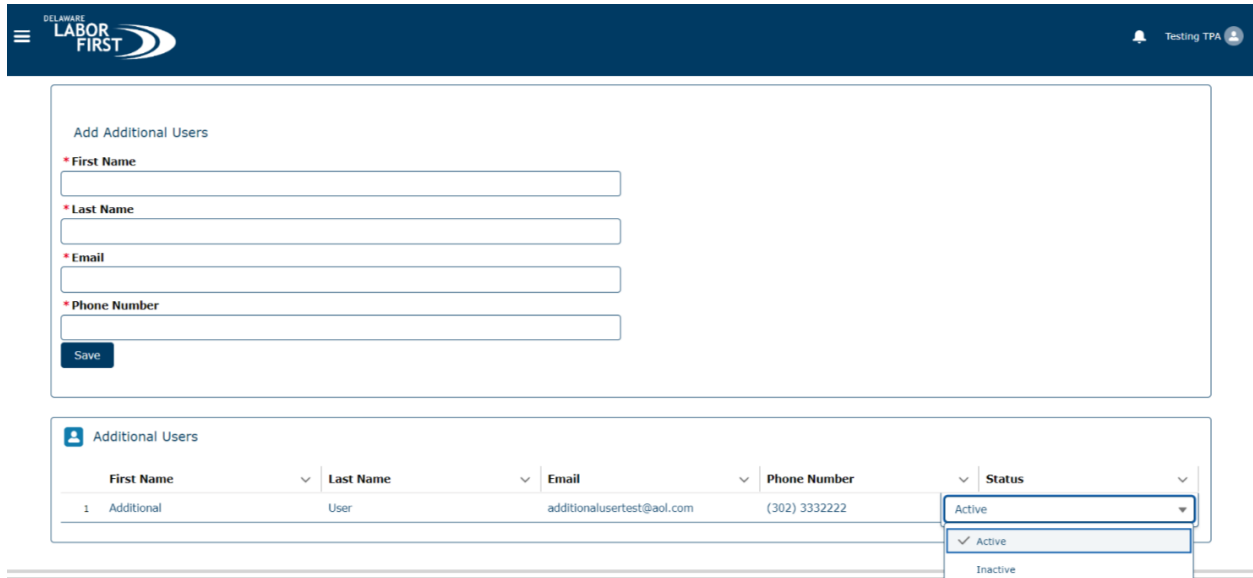Add Additional Users

* First Name

* Last Name

* Email

* Phone Number

Save

Add Additional Users Screen

Manage Additional Users

The Account Administrator can manage additional users that were added to the employer and/or TPA account. As previously mentioned, only the administrator will have access to this screen to edit a user's access, select the pencil icon. Administrators cannot deactivate other users with Administrator permissions.

Manage Users Screen

Manage TPA Access

Employers who already have an agreement with a TPA will request establishing a TPA relationship in LaborFirst from the Employer Portal. The employer will initiate the relationship by selecting a TPA registered in Delaware Labor First, the relationship start date, end date (if known), and access level.

TPA Authorization levels:

- Administrator: read/update/create access is provided for all functions.

- Maintain Profile: read/update/create access to account information.

- Paid Leave Registration: may complete the paid leave account division registration.

- File / Amend Paid Leave Records: allows the TPA to file a quarterly wage and hour report.

- Paid Leave- File Waivers and Reclassifications: allows the TPA to access the 'File Waiver' and 'File Reclassification' links within the Paid Leave division.

- File Paid Leave Appeals: allows the TPA to access to 'File Appeal' link.

- Paid Leave - Make a Payment: allows the TPA to make payments to the Division of Paid Leave on behalf of an Employer

Upon submission, the designated TPA will receive an email notification prompting them to Approve or Deny authorization (see next page)

Note: The TPA notification email is sent to the preferred method of communication associated with the TPA account.

TPA Authorization Request

8/5/2024

Dear Terrific TPA,

Thriving Business has requested authorization for you to perform the following services for their Delaware Department of Labor account:

- Administrator

Please click on the link below to confirm or deny that you will performing the service(s) on Thriving Business 's behalf.

Confirm Authorization

Authorization Denied

Sincerely,

Delaware Department of Labor

TPA Authorization Email Request

Selecting **Confirm Authorization** or **Authorization Denied** will presented one of the following messages depending upon whether the authorization was Approved or Denied.

About | Contact Us

TPA Authorization Approved

You have Confirmed Thriving Business's authorization request and your access is pending review by the department of labor to do the following on their account: Administrator

Home

TPA Authorization Approved Notification

Once an employer has requested a TPA Authorization, and the TPA has accepted, the approval is sent to Delaware Department of Labor staff for final approval.

Bulk Reporting

Third Party Administrators normally represent multiple employers at a given time. A TPA may file quarterly reports via 'Bulk Reporting'. A bulk report is like a typical uploaded report. The TPA will have the report saved to their computer as a CSV or XML file to upload in the TPA portal. The difference between a bulk upload and a regular upload is that the TPA can upload multiple employers on one report.
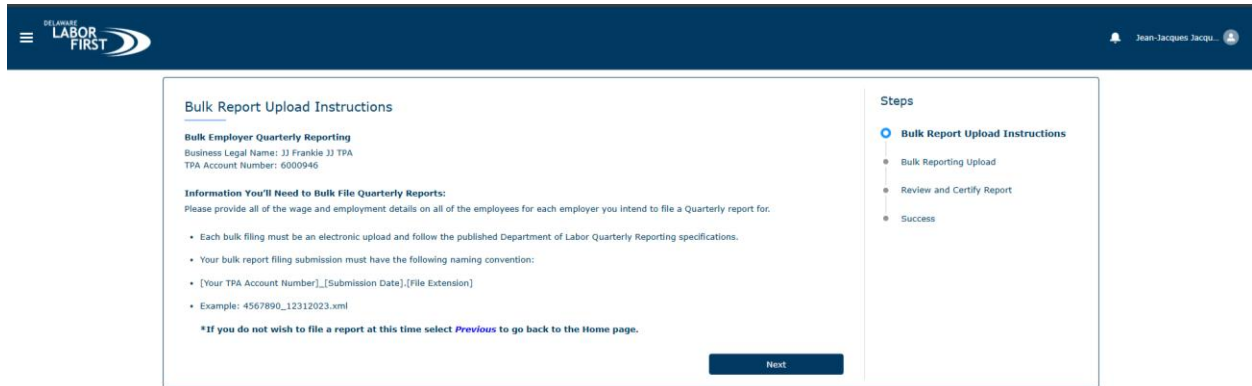
To launch the Bulk Reporting process, login to the TPA portal and select the 'Bulk Reporting' link from the Portal Page.
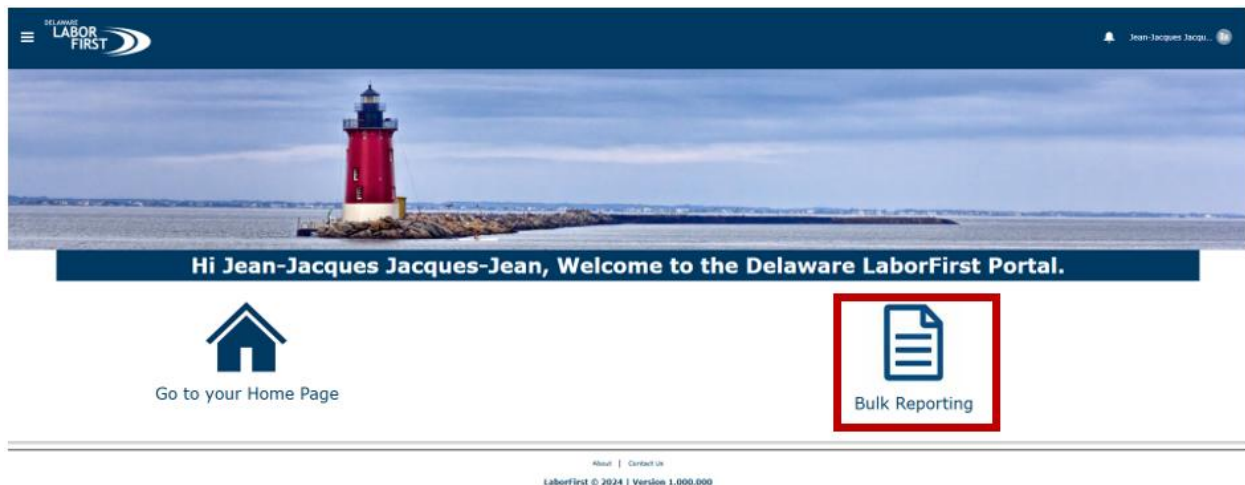
TPA Portal Page – Bulk Reporting

The first step in the Bulk Reporting process is the **Bulk Report Upload Instructions** page. This page contains important information and instructions to complete the report. Select the 'Next' button to proceed.

Note: It is a good idea to check individual employer accounts to ensure a quarterly report has not already been submitted. A report may only be submitted once; therefore, if the bulk report includes an employer that has already had a quarterly report filed, the report processing will fail.

Bulk Report Upload Instructions

The next step in the Bulk Reporting process is the **Bulk Reporting Upload** screen. Here, select the 'Upload Files' button and select the report to upload.

Bulk Reporting Upload

Once the file is attached, select the 'Done' button on the **Upload Files** pop-up then select the 'Next' button.
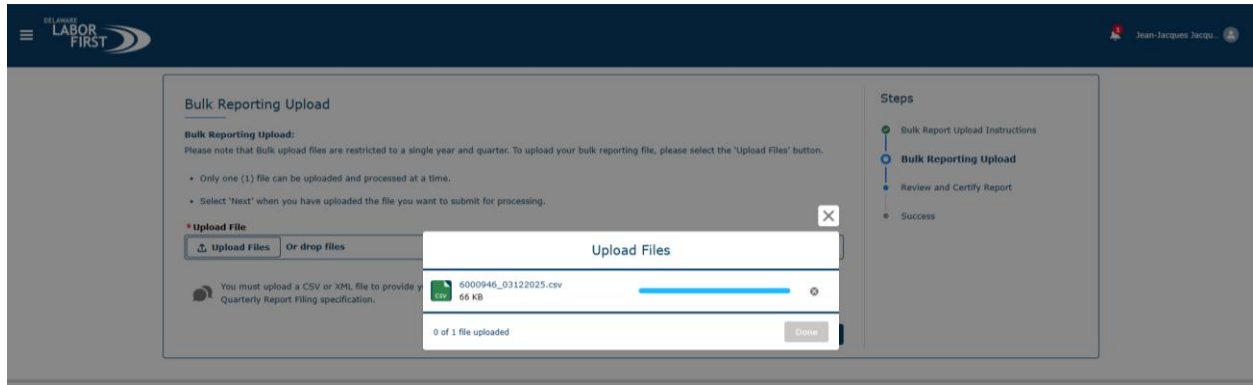
Bulk Reporting Upload Files

The next step in the Bulk Reporting process is the **Review and Certify Report** screen. Here, the user will review the file name, type, and size. Once sure the attached file is correct, agree to the certification statement, sign, and date. Then, select the 'Next' button to submit the report.

Review and Certify Report

The final step in the Bulk Report process is the 'Success' page. Here, the user will receive a confirmation the report was received.
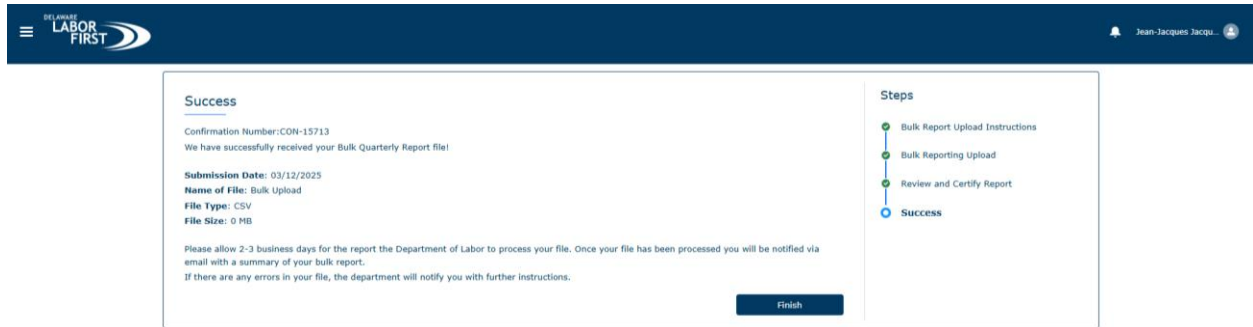
Success

Once the Bulk Report has been processed by LaborFirst, the TPA will receive an email indicating whether the report was processed successfully or unsuccessfully.

Dear Tony TPA,

The Department of Labor has successfully processed your Bulk Quarterly Report!

Report Name: [Report Name]

Submission Date: [Submission Date]

Processing Date: [Processing Date]

Status: Successful

If you have any questions or need further assistance, please do not hesitate to contact our support team at [Support Email Address] or [Support Phone Number].

Thank you for your prompt submission and cooperation.

Sincerely,

The Department of Labor

TPA Email – Status: Successful

If the Bulk Report process fails, the TPA will receive an email indicating the report status as 'Unsuccessful'. Review the report for errors (invalid SSNs, duplicate lines, missing or incomplete data, etc.). Also review individual employers' accounts to ensure a report has not already been submitted.

Once the report has been reviewed and errors corrected, the report may be submitted again using the prior steps.

Dear Tony TPA,

The Department of Labor was unsuccessful in processing your Bulk Quarterly Report submitted on [Submission Date]!

Report Name: [Report Name]

Submission Date: [Submission Date]

Processing Date: [Processing Date]

Status: Unsuccessful

A total of [number] accounts errored out while processing your file. Please make sure all records adhere to file format standards and that the provided employer accounts can have quarterly reports posted to them.

*Note: Quarterly Reports containing errors will remain unfiled until the reports are processed successfully. All quarter due dates will remain unchanged. To avoid any penalties, please ensure all reports are submitted before the quarter's end.
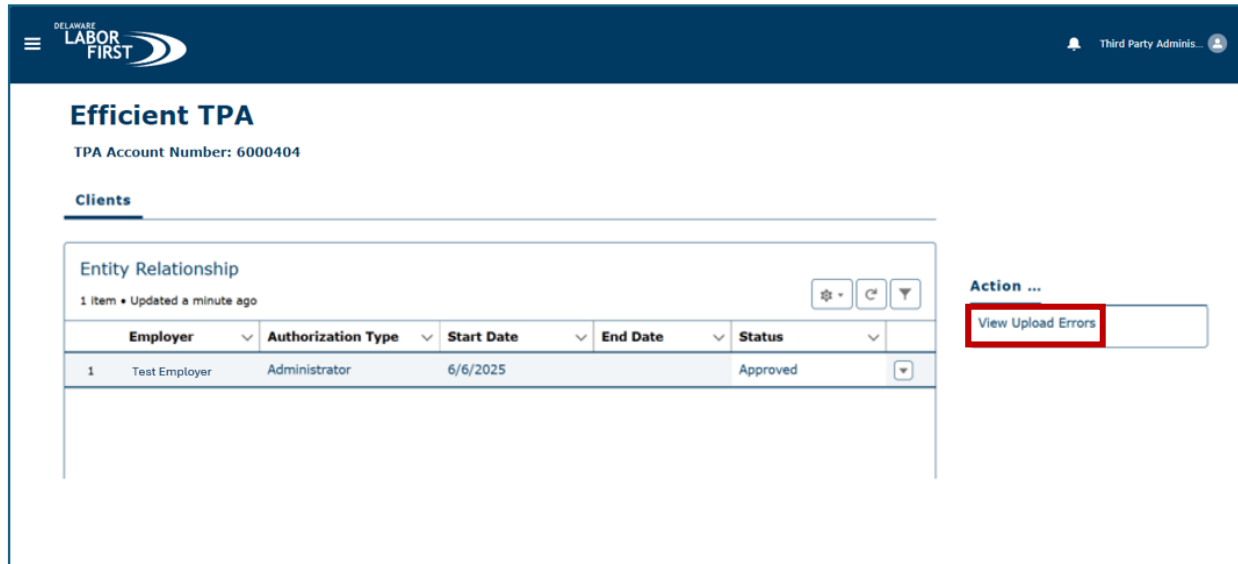
Sincerely,

The Department of Labor

**TPA Email – Status: Unsuccessful**

Bulk Reporting Errors

When a TPA uploads a bulk report file with errors, an 'Action Item' will display on their TPA Portal Homepage. Select 'View Upload Errors' to be navigated to **Upload Report Error Summary Screen**.
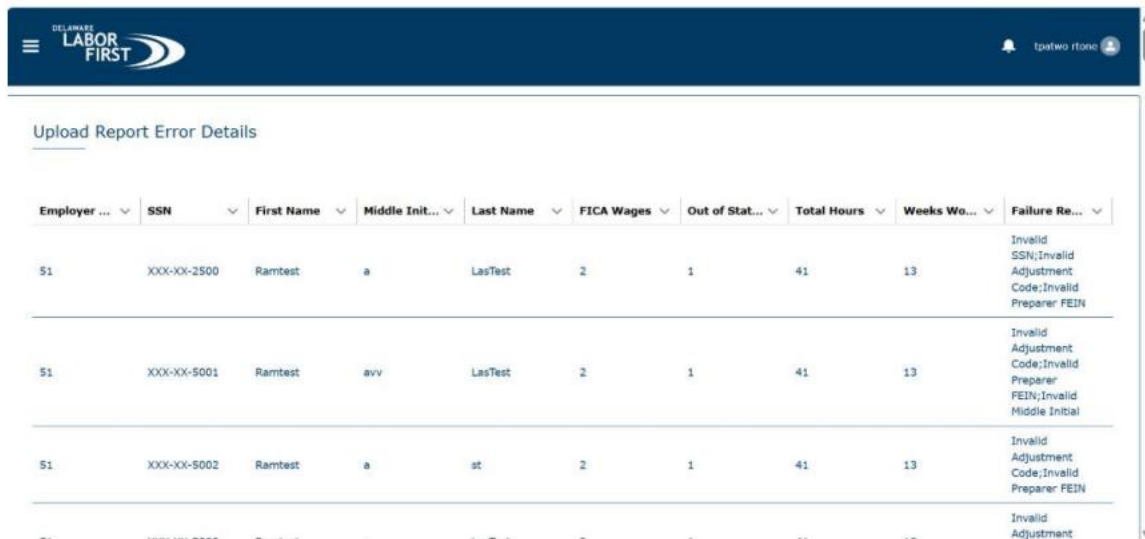

Action Item: View Upload Errors

The Upload Report Error Summary Screen is used to view the errors associated with a file upload. This screen contains the Submission Date, Submission Time, Number of Records, Number of Error Records, and overall status of the file upload. Select 'View Errors' to view the errors associated with the file.
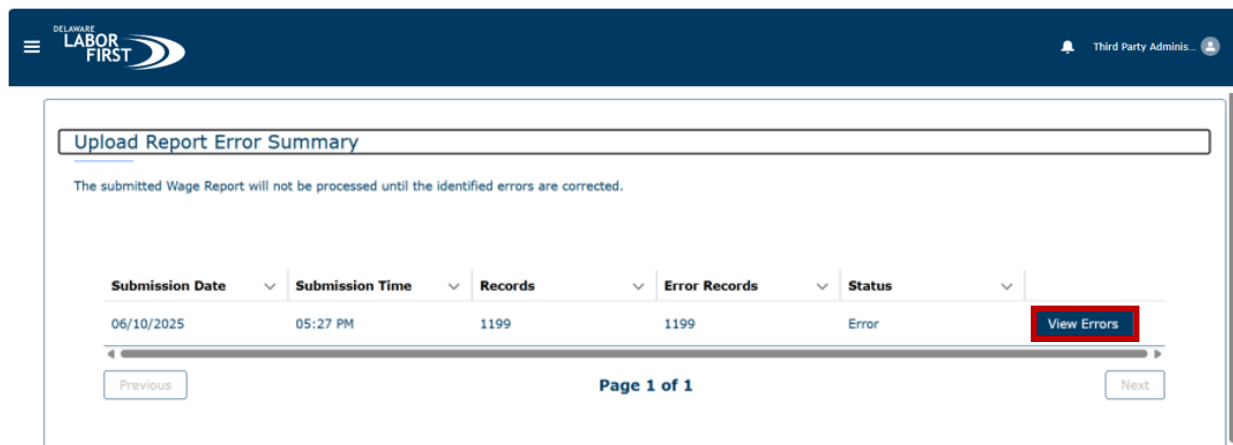
Upload Report Error Summary Screen

The Upload Report Error Details Screen displays the error failure reasons.

Employer ...	SSN	First Name	Middle Init...	Last Name	FICA Wages	Out of Stat...	Total Hours	Weeks Wo...	Failure Re...
51	XXX-XX-2500	Ramtest	a	LasTest	2	1	41	13	Invalid SSN;Invalid Adjustment Code;Invalid Preparer FEIN
51	XXX-XX-5001	Ramtest	avv	LasTest	2	1	41	13	Invalid Adjustment Code;Invalid Preparer FEIN;Invalid Middle Initial
51	XXX-XX-5002	Ramtest	a	st	2	1	41	13	Invalid Adjustment Code;Invalid Preparer FEIN

Upload Report Error Details Screen

Make a Payment

Make a Payment: Single Employer

TPAs have the ability to file a payment on behalf of a single Employer. To make a payment, log into the TPA portal and navigate to the Account Division screen for an Employer. Then, select 'Make a Payment' from the Action Items.

Account Division- Make a Payment Action Item

The first step in the Make a Payment process is the **Making a Department of Labor Payment** screen. Here, select the division for which you wish to make a payment, then select 'Next'.

Making a Department of Labor Payment

The next step in the Make a Payment process is the **Make a Payment** screen. This screen allows the Employer to select a payment amount and payment method. 'Total Amount Due', 'Employer Name' and 'Account Division Number' are prepopulated and read-only.

Make a Payment

TPAs will use the GoDE portal to make a single payment via Credit/Debit Card, or directly through a bank account. The TPA is asked if they would like to make an ACH Debit, Debit Card, or Credit Card Payment. If they select 'Yes', they are asked to enter the Payment Amount. The Payment Amount cannot be greater than the total contribution due. Additionally, text is presented to alert the TPA that they will be redirected to GoDE for payment processing.

Select 'Next' to be navigated to the GoDE Payment Portal.

Make a Payment- ACH Debit, Debit Card, or Credit Card

The GoDE Payment Portal allows the TPA to select their payment method: Credit/Debit Card or Bank Account. Enter the requisite information and select 'Review and Pay'.

GoDE Payment Portal

The next screen in the GoDE Payment Portal is the **Review and Make a Payment Screen**. Here, the TPA will review their payment information, and select 'Make Payment' to finalize the payment process.

Review and Make a Payment

The **Confirmation Screen** is displayed when a successful payment has been received in the GoDE Payment Portal. Select 'Finish' to be navigated back to the **Account Division Screen**.
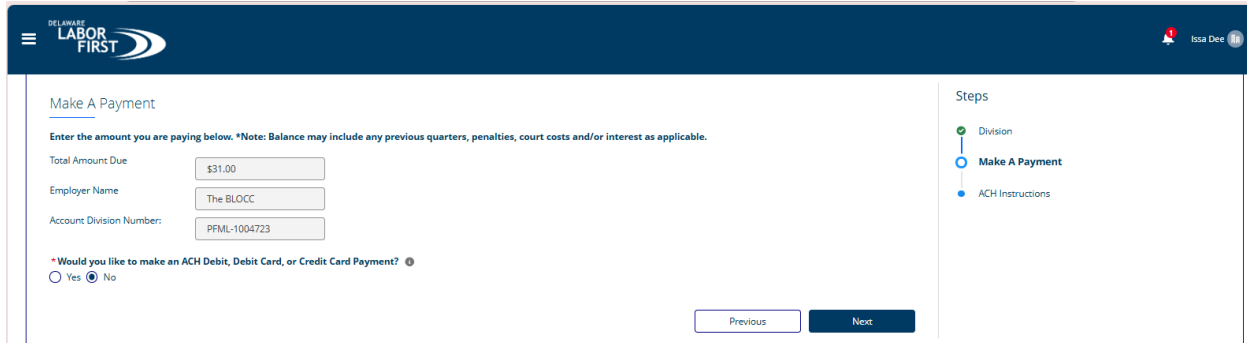

Confirmation

Bulk Payments

Additionally, TPAs have the ability to file bulk payments on behalf of multiple Employers they represent via ACH Credit. Please note: ACH Credit payments are made directly to the bank through an electronic file. However, TPAs can reference the ACH Instructions Screen in LaborFirst if additional support is needed.

To view the ACH Instructions Screen, log into the TPA portal and navigate to the Account Division screen for an Employer. Then, select 'Make a Payment' from the Action Items.
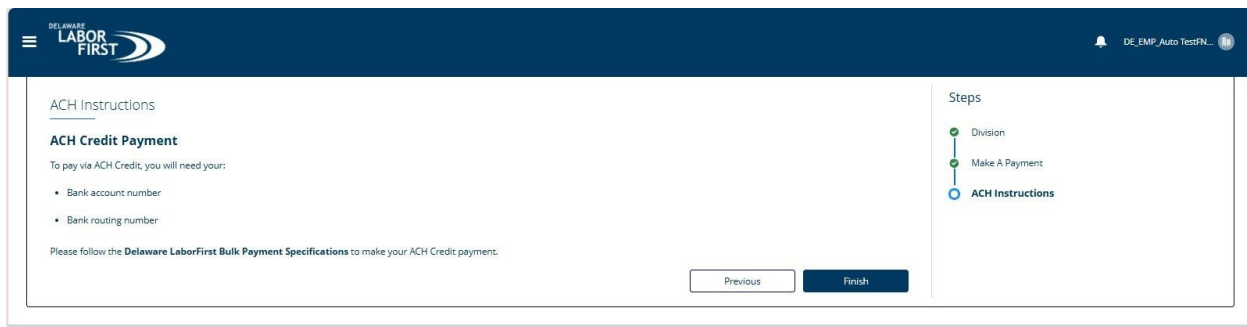
Once navigated to the **Making a Department of Labor Payment Screen**, select the division for which you wish to make a payment, then select 'Next'. To view ACH Instructions, select 'No' on the **Make a Payment Screen**, and please note that **ACH Instructions Screen** populates in the 'Steps Bar'.

Make a Payment- ACH Credit

The ACH Instructions Screen provides directions to the Employer/TPA on ACH Payment Setup. ACH Credit is a transaction directly between banks. These payments will occur outside of LaborFirst. The Delaware LaborFirst Bulk Payment Specifications can be found here.

Select 'Finish' to exit the Make a Payment Process.

ACH Instructions

Payment History

TPAs can view previously submitted payments on the Payment History Screen located in the Navigation Menu.

Navigation Menu: Payment History

Payment History Screen