



INDIANA
WORKFORCE
DEVELOPMENT

ADDING AN EXTERNAL USER

UPLINK Employer Self Service

April 11, 2019

The screenshot shows the Couplink Dashboard. At the top left is the 'couplink' logo. The main header is 'Dashboard'. On the left is a navigation sidebar with items: Home, Select an Employer, Summary Information, Wage Reports, Make a Payment, Profile Maintenance, and Requests. The main content area displays account details: 'DB LLC SUTA.', 'Business Type Limited Liability Company', and 'FEIN 55'. A red banner with a warning icon says 'Account has an overdue payment, please fix now.' with a 'Fix Now' button. Below this is a 'Welcome Dawn' message and the question 'What Would You Like To Do Today?'. Four blue buttons are shown: 'Make a Payment' (with a dollar sign icon), 'File a Report' (with a folder icon), 'Change Status' (with a double arrow icon), and 'Manage Users' (with a group of people icon). A red arrow points to the 'Manage Users' button.

Before you start make sure that you have your agents 6 digit ID number they received when they enrolled as an agent with DWD (the number usually starts with the number 1). You will need this information to add the agent to your account.

Once you have this information logon to your account and click on Manage Users. You can also click on Maintain Accounts from your left-hand navigation bar and then on User Information.

The screenshot displays the 'User Maintenance' interface. At the top, there is a blue header with a user icon and the text 'User Maintenance'. Below this is a sub-header for 'Internal Account Users' with an upward arrow. The main content area includes a table with columns: User Name, Contact Name, Telephone, Email, Authorization Level, and a set of action buttons (Edit, Delete, Unlock). The table shows three entries, with the first one partially visible. Below the table, there is a 'Showing 1 to 3 of 3 entries' message and navigation buttons for 'Previous', '1', and 'Next'. To the right of the table, there is a search box and an 'Add User +' button. Below the 'Internal Account Users' section is a blue header for 'External Account Authorizations (Agents)' with an upward arrow. Below this header, there is an 'Add Agent +' button with a red arrow pointing to it. At the bottom, there is a blue banner with an information icon and the text 'There are no authorized agents to view.'

An external user is a person or business that you want to authorize to receive confidential information and speak in behalf of your business. This might be an accounting firm, a payroll provider, or other third party representative.

On the User Maintenance screen, in the External Account Authorizations (Agent) section click on the arrow to the far right in the section heading. This will open the option to add an agent. Click on the Add Agent button.

The screenshot shows the 'Agent Search' screen in the Couplink application. The sidebar on the left contains navigation links: Home, Select an Employer, Summary Information, Wage Reports, Make a Payment, Profile Maintenance, and Requests. The main content area has a blue header with the text 'Agent Search' and a building icon. Below the header is a form titled 'Agent Search' with two input fields: 'Agent Business Name' and 'Agent ID'. Red arrows point to these fields. At the bottom of the form are two blue buttons: 'Search' and 'Cancel'.

The Agent Search screen will appear, here is where you will enter your agents 6 digit ID number or search for your agent's name.


If you have your agents 6 digit ID number enter it in the Agent ID field. If you do not have your agents ID number just enter their business name in Agent Business Name field. After entering the information select the Search button.

118905

Search

Search Results

Show 10 entries Search:

Agent Business Name	Agent ID	Contact Name	Telephone	Email	
BUSINESS TAXES, LLC	118905	Dee Agent	317-555-5678	phonyagent@gmail.com	 Next

Showing 1 to 1 of 1 entries

Previous 1 Next

Cancel

The search results will be listed on the screen below based on your search criteria. To select the agent from the list click on the Next icon with the pencil to the right of the agent's email.

The screenshot shows a web form titled "Add External User Account". At the top, there is a blue banner with the title. Below it is an information icon and the text "Click the search button to retrieve agent information." The form has two main sections: "Agent Name" and "Authorization Level". The "Agent Name" field contains "BUSINESS TAXES, LLC" and a "Search" button. The "Authorization Level" field is a dropdown menu currently showing "[select one]". A red arrow points to the dropdown arrow icon. A dropdown menu is open, showing four options: "Administrator", "Benefits", "Wage Records", and "Wage Records and Benefits". Below the form, there is a section titled "Agent User Information" with a "First Name" field.

Now assign the level of authorization you want your agent to have. Based on what your agent handles for your company (wage records, benefits, or both) is what you will select for the level of authorization. If your agent only handles your benefits records or your wage records, then you will assign them either the Benefits or Wage Records authorizations and so on. Rarely will an external agent need administrator level authorization.

Important Information



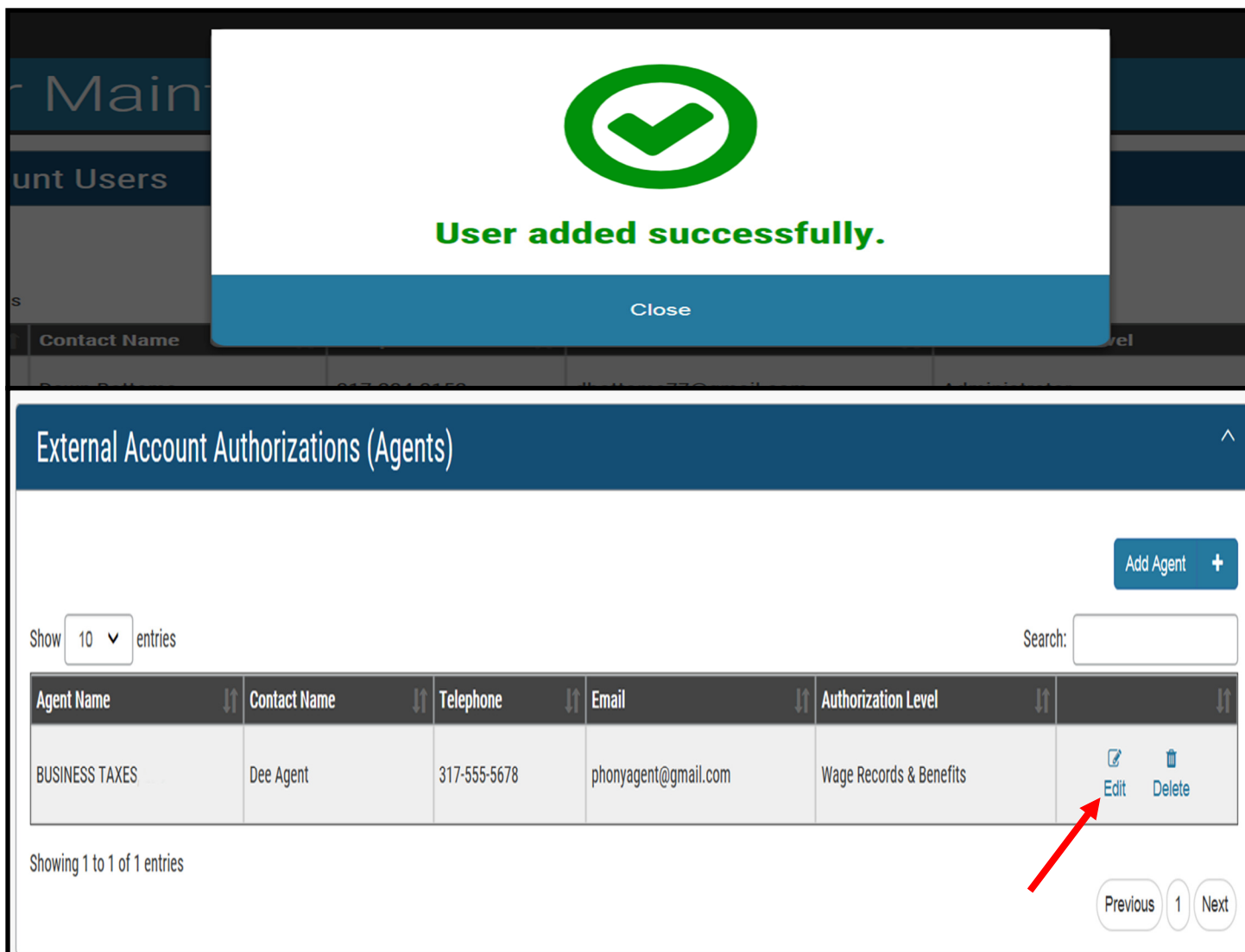
By checking this box, I certify that I, Dawn , am a responsible party for DB LLC identified for federal tax identification purposes as 55- I understand that I am granting or retracting the selected agent on this screen full and exclusive power (based on the authorization level(s) indicated) to represent DB LLC before the Indiana Department of Workforce Development (IDWD) in connection with all matters affecting DB LLC unemployment insurance account including all claims for benefits, benefit charges, tax contributions, tax refunds, merit rating, appeals, and/or hearings until I otherwise notify IDWD. I understand that it is my responsibility to maintain and keep current DB LLC's authorized agent assignments.

Cancel

Add & New

Next

Read the important information and check the box to certify you have the authority to assign this agent to your account (this should be the Administrator on the account) and click the Next button.



The screenshot shows a web application interface. At the top, a white modal box with a green checkmark icon and the text "User added successfully." is displayed over a "Close" button. Below this, the main content area is titled "External Account Authorizations (Agents)". It features an "Add Agent +" button, a search bar, and a table with one entry. The table has columns for Agent Name, Contact Name, Telephone, Email, and Authorization Level. The entry shows "BUSINESS TAXES" for the agent name, "Dee Agent" for the contact name, "317-555-5678" for the telephone, "phonyagent@gmail.com" for the email, and "Wage Records & Benefits" for the authorization level. To the right of the authorization level are "Edit" and "Delete" buttons. A red arrow points to the "Edit" button. At the bottom, there is a pagination control showing "Showing 1 to 1 of 1 entries" and "Previous 1 Next".

External Account Authorizations (Agents)

Show 10 entries Search:

Agent Name	Contact Name	Telephone	Email	Authorization Level	
BUSINESS TAXES	Dee Agent	317-555-5678	phonyagent@gmail.com	Wage Records & Benefits	Edit Delete

Showing 1 to 1 of 1 entries

Previous 1 Next

Your external authorization has been added successfully and you will be able to see that agent and authorization level that you have assigned. You will also have the option to edit the agent authorization level anytime by using the Edit option to the right of the authorization level.

If you have any questions about assigning your third party representative authorization on your account, phone representatives are available by calling 1-800-891-6499, choose option #2, and then choose option #3.