State of Oregon Employment Department

UNEMPLOYMENT INSURANCE

FRANCES ONLINE

Granting Benefits Access – as an Employer

How to give a Third Party Administrator (TPA) or other authorized employee access to Unemployment Insurance benefits information

As an employer, you, or someone you choose, will need to answer questionnaires we send you as part of your employees' application for Unemployment Insurance (UI) or Paid Leave Oregon benefits. If you have a TPA, you will need to add them as a user to your Frances Online account or adjust their access so they can see benefits information.

This guide shows you:

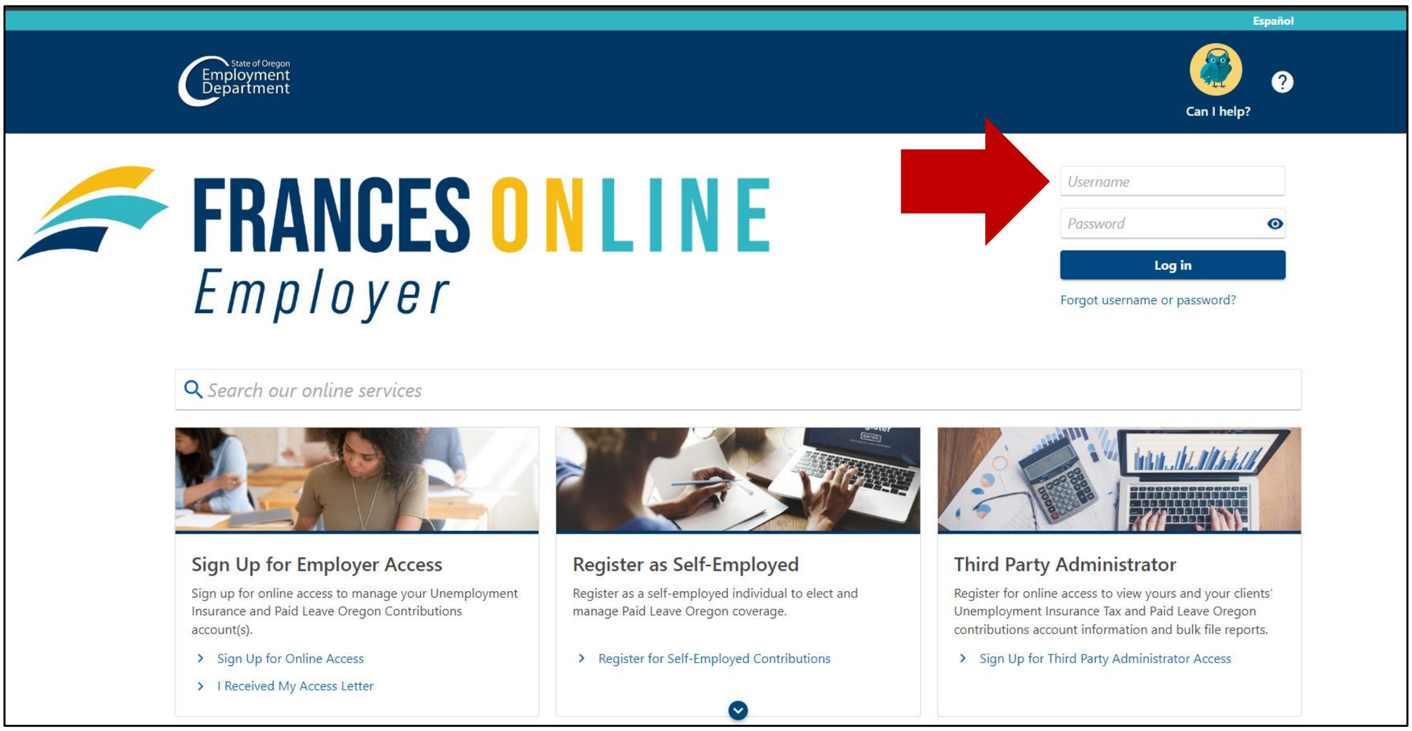
- **How to ask for access to benefit information**
  - when you **are not** the account administrator
  - when you **are** the account administrator
- **How to give someone else access to benefits information**
  - when they **do not** have a Frances Online logon, or account
  - when they **do** have a Frances Online logon, or account

Go to the Frances Online Employer Portal

There are two ways to get there:

- Go to frances.oregon.gov
    - Under "Employers, Self-Employed, and Third Party Administrators," select "Log on to Frances Online."
- Enter your email address (username) and password and select "Log in."

Note: If you do not have a Frances Online account, go to frances.oregon.gov and select "Sign up for access" on the Employer panel. Come back to this guide when you've completed the sign-up process.

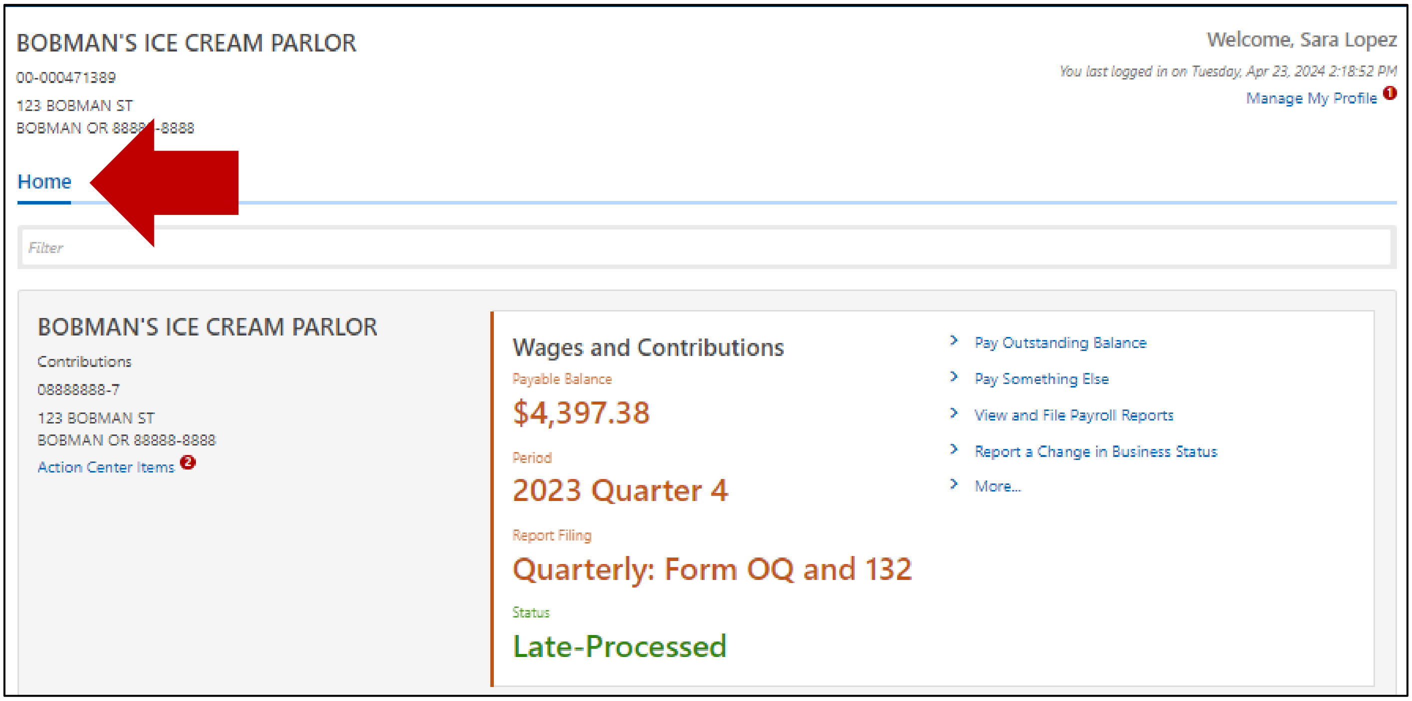


For added security, you will need to enter the security code the Frances system sends you by the method you chose when you created your account.

Requesting benefit access when you *are not* the account administrator

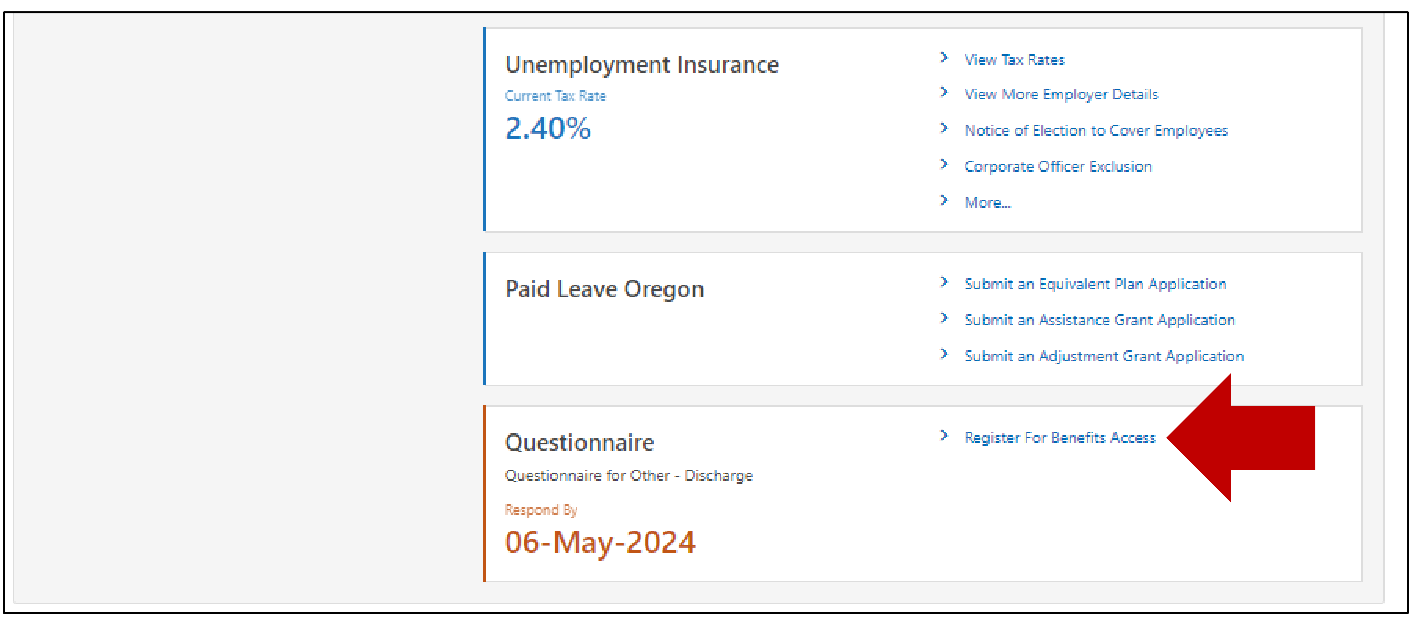
Step 1 — After logging in, you'll see the Home tab.

- Scroll down past the wages and contributions panels to a new panel, the **Questionnaire panel**, at the bottom. After you have benefits access, you can answer UI or Paid Leave questionnaires from this panel.

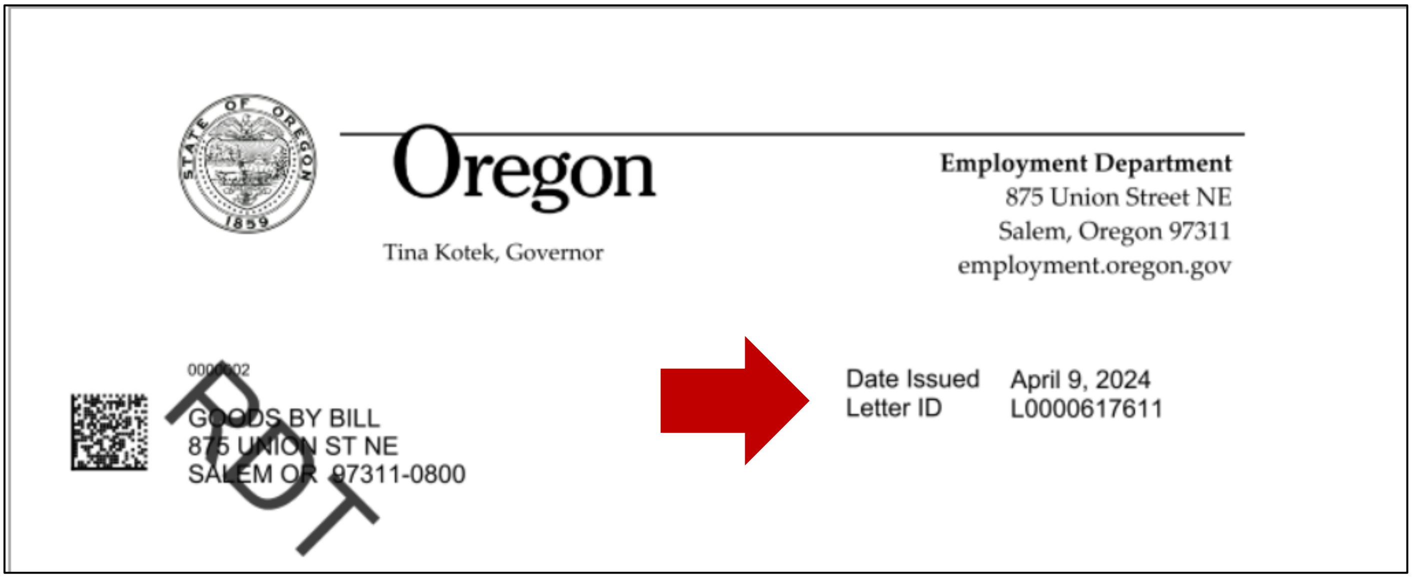


Step 5 — To request access to benefits information, select Register For Benefits Access.

- You'll need to provide proof that you are authorized by your business to access benefits information. You will do this by entering the Letter ID from any benefits letter.



Every UI or Paid Leave Oregon letter has a unique Letter ID. Here is an example of what a benefits letter looks like.



Oregon

Tina Kotek, Governor

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0000002
GOODS BY BILL
875 UNION ST NE
SALEM OR 97311-0800

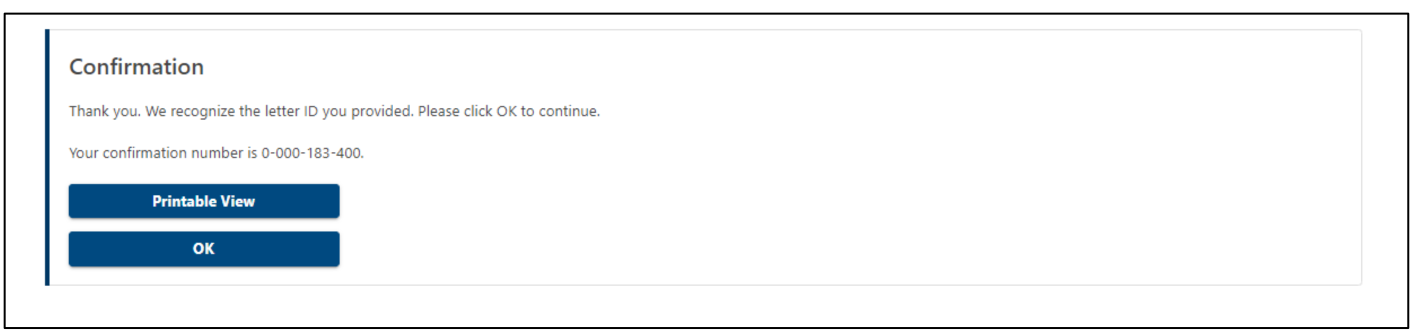
PDT

Date Issued April 9, 2024
Letter ID L0000617611

Step 6 — The Letter ID starts with the letter "l" followed by 10 digits.

- If you don't have a letter with an ID, you will need to ask your client to send you one. If you do have a letter ID, enter it here and select Submit. (L0000581591)

Step 7 - You have now registered for benefit access. You should see a confirmation screen, where you can print your confirmation number if you choose.



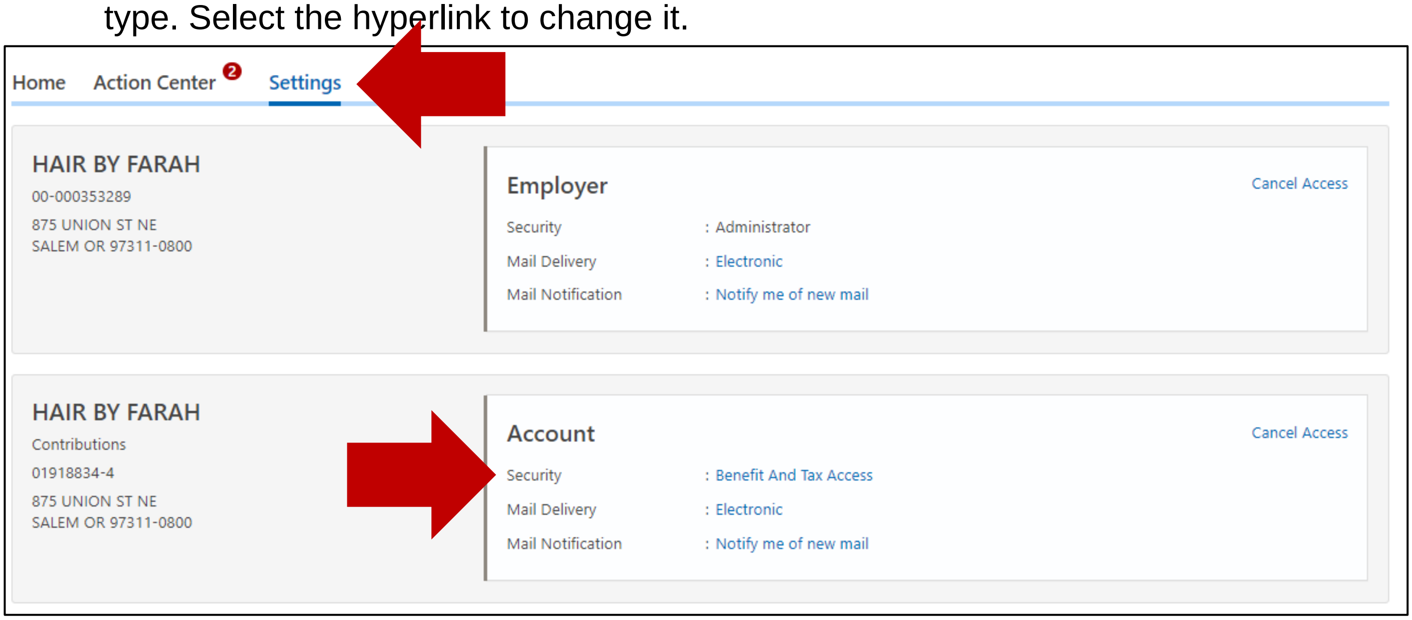
Step 8 — Select the Home tab and scroll down to the Questionnaire panel.

- You now have benefits access and can choose the **Respond to Questionnaires** hyperlink to answer questionnaires.

Requesting benefit access when you *are* the account administrator

Step 1 — After logging in, you'll see the Home page.

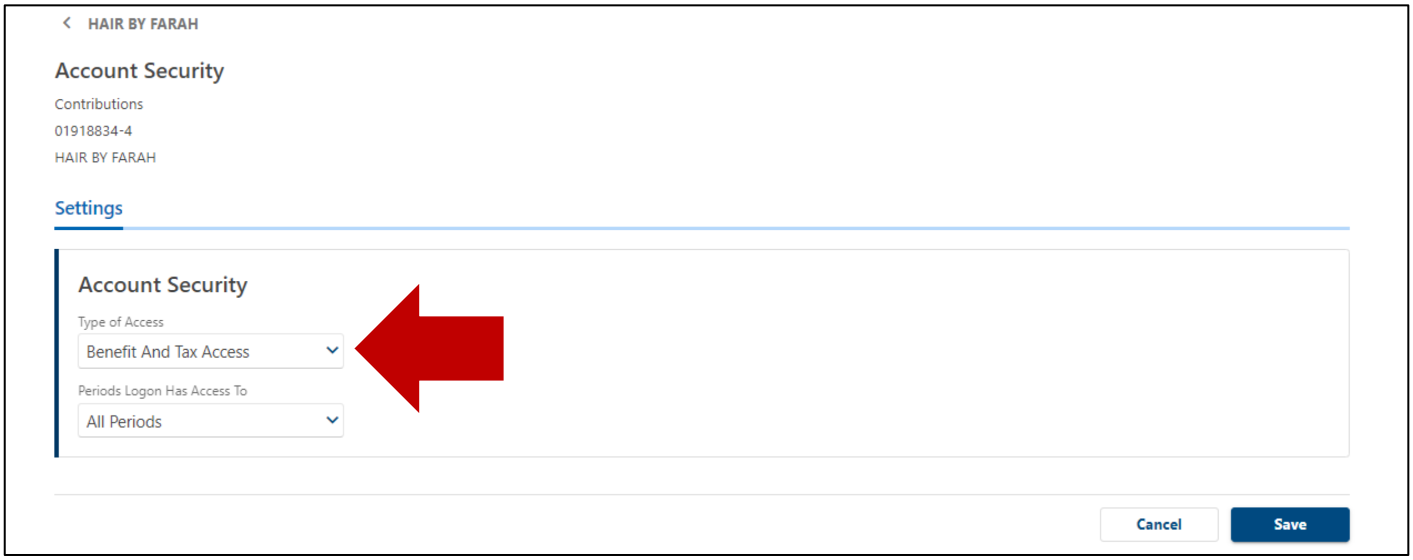
- Now select the Settings tab.
- In the Account panel, in the Security row, you can see your current security access type. Select the hyperlink to change it.



Step 2 — Select the Type of Access drop-down menu. All the security access types are listed here. Select the benefit access type that you need.

- **Benefit and Tax Access** will allow you to file payroll reports, pay tax bills, and answer benefits questionnaires.
- If you **will not** be filing payroll reports or submitting payments, you can choose **Benefits Access.**

- You can select the second drop-down menu if you want to change the access from All Periods to a limited date range. Select **Save.**



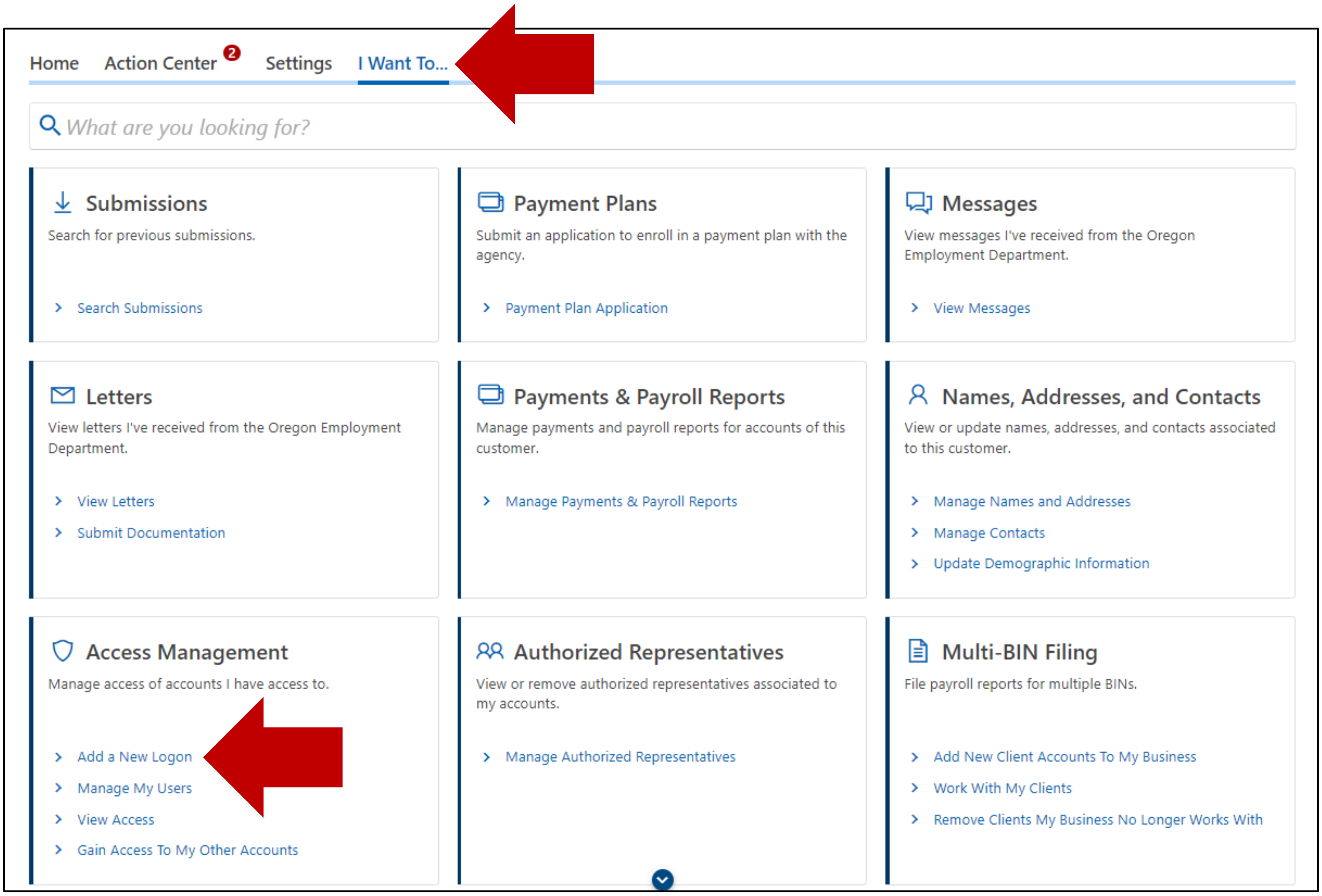
Step 3 — Select the Home tab and scroll down to the Questionnaire panel.

- You now have benefits access and can choose the **Respond to Questionnaires** hyperlink to answer questionnaires.

Giving access to benefits information to someone who *does not* have a web logon

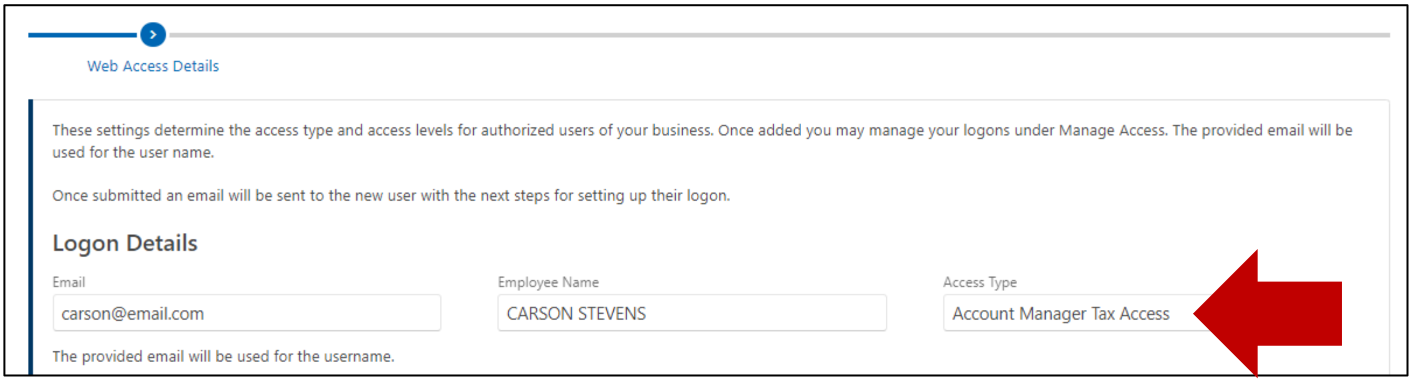
Step 1 — After logging in, you'll see the Home tab.

- To create their logon and assign them the access type they need, from your home dashboard, select the **I Want To** tab, and in the **Access Management** panel, select **Add a New Logon**.



Step 2 — To add an authorized user

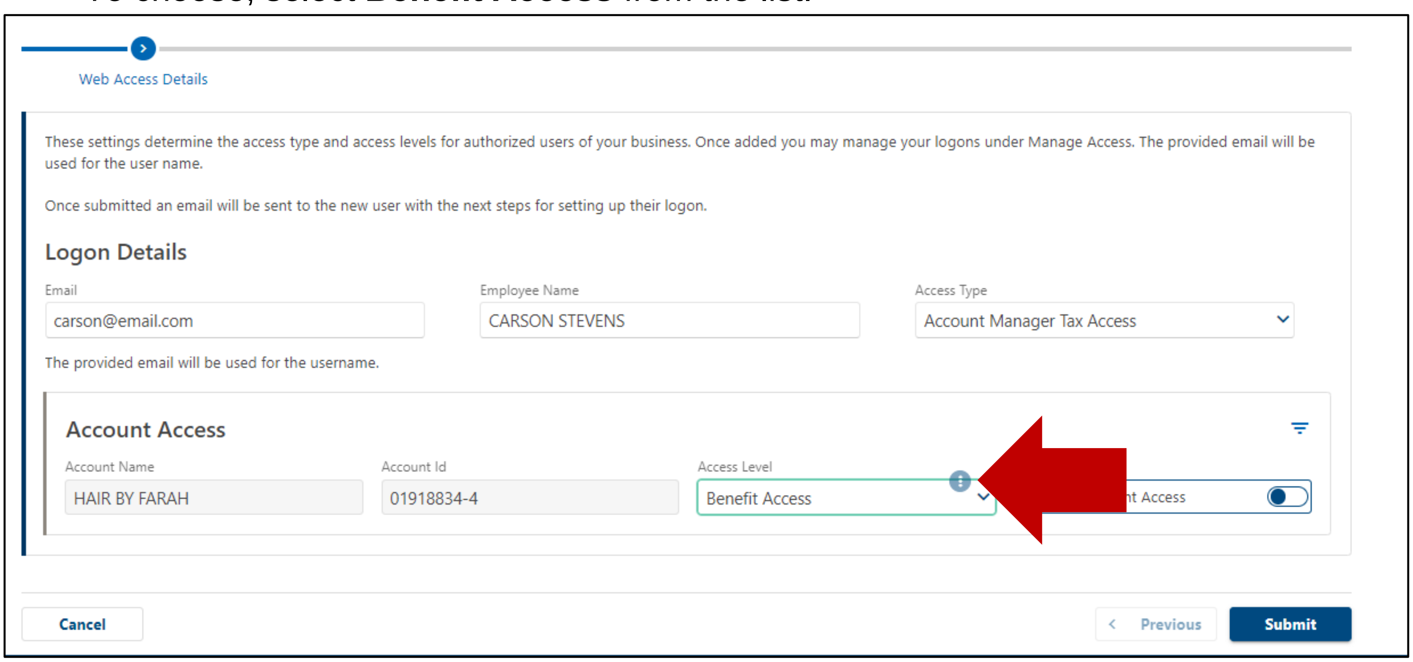
- Enter their email which will be the username when they log on
- Enter their name
- Choose their **Access Type**
    - As you hover over the Access Type drop-down menu, a blue circle appears. Select it for a description of each access type.
- To give someone access to answer benefit questionnaires, choose **Account Manager Tax Access** for the Access Type.



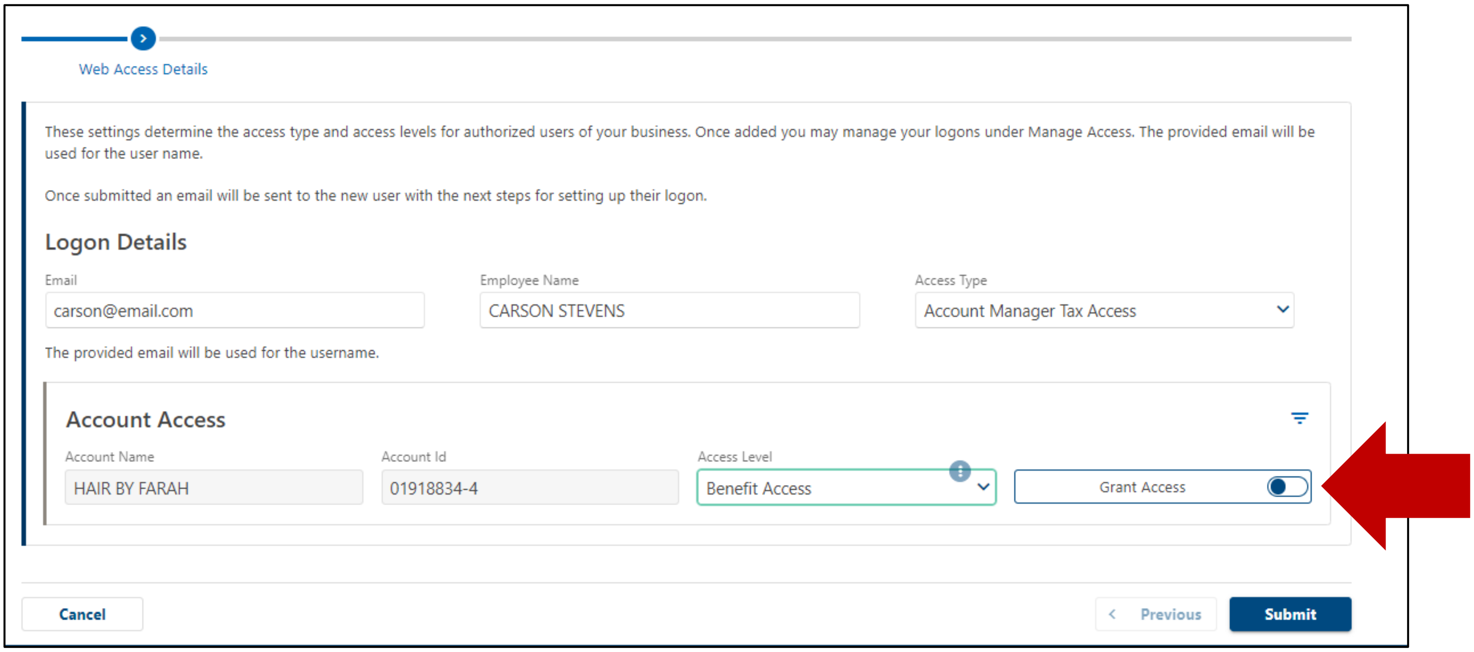
We will email new users a letter with a link to update their password. After they update their password, they will set up their profile. **The link is only valid for SEVEN (7) days.** If the link expires, they will need to contact us for help setting up their account.

Step 3 — Now let's move to the Account Access panel.

- Select the blue circle next to the Access Level dropdown menu to learn more about each access level. In this example, Carson only needs Benefit Access.
- To choose, select **Benefit Access** from the list.

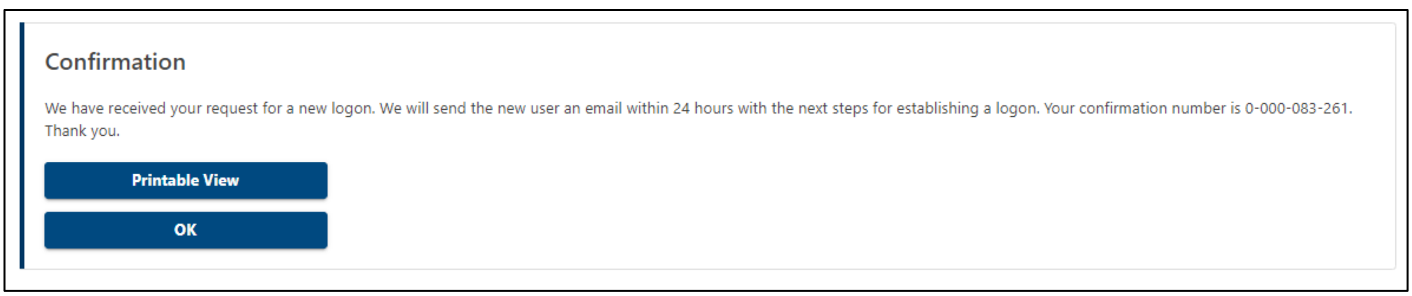


Step 5 – Select anywhere in the Grant Access toggle box to confirm.



Step 6 – Now select Submit to see your request confirmation.

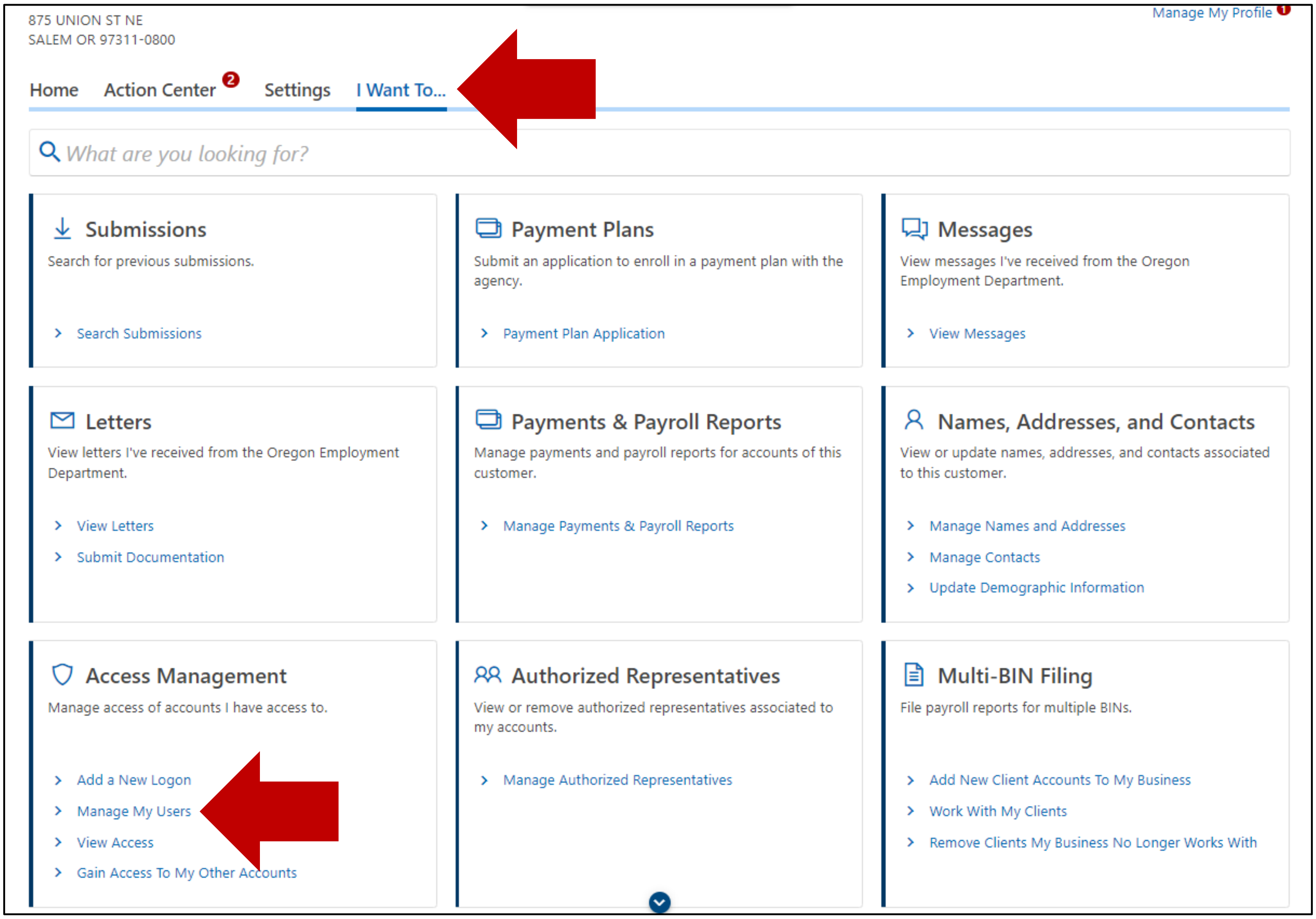
- Carson now has access to benefit information access and can respond to benefits questionnaires related to UI or Paid Leave Oregon claims.



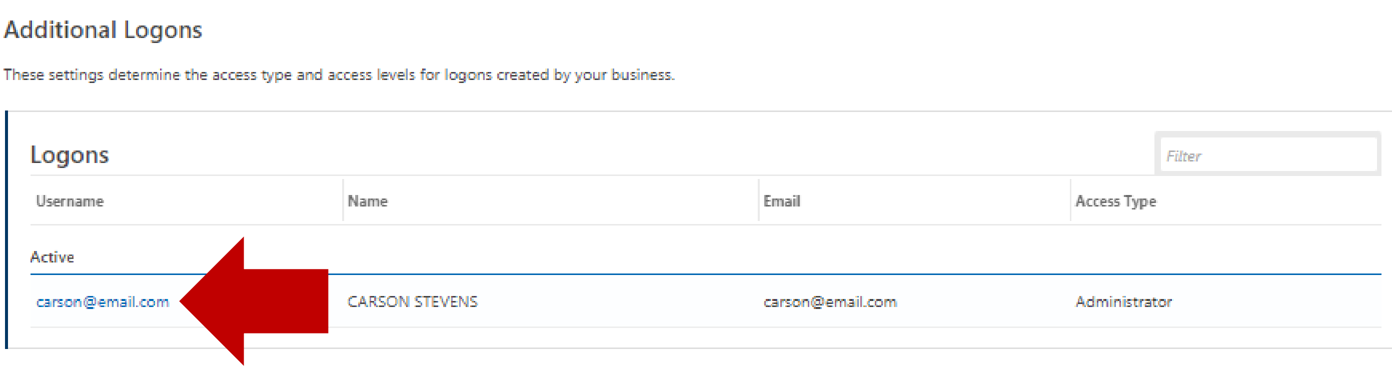
Giving access to benefits information to someone who *does* have a web logon

Step 1 — After logging in, you'll see the Home tab.

- Select the **I Want To…** tab.
- In the Access Management panel, select **Manage My Users**.

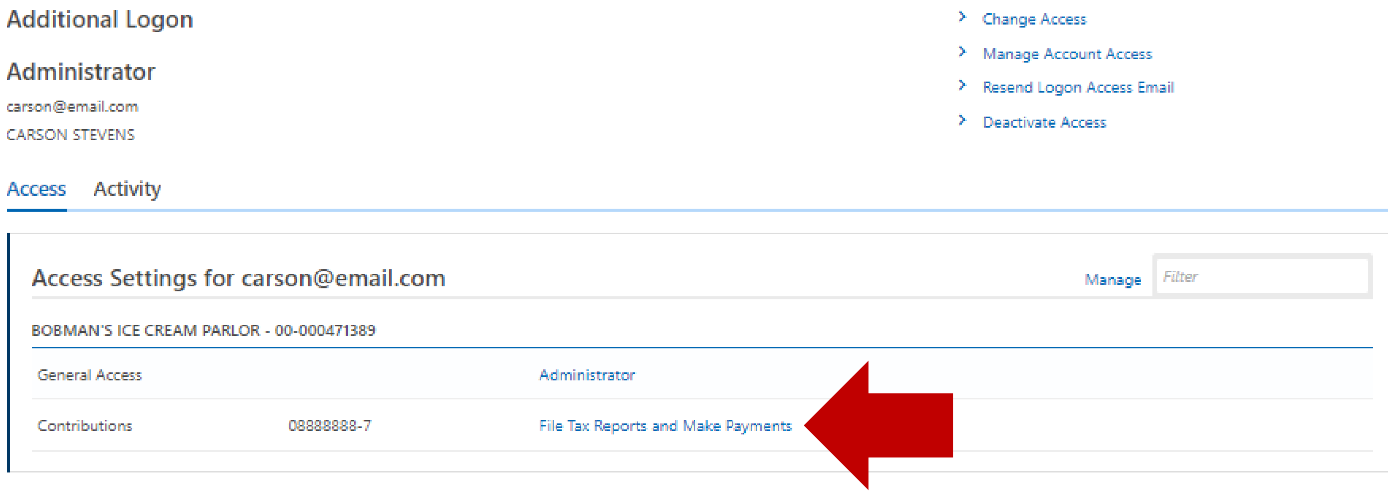


Step 2 — To change an employee's level of access, select their email address.

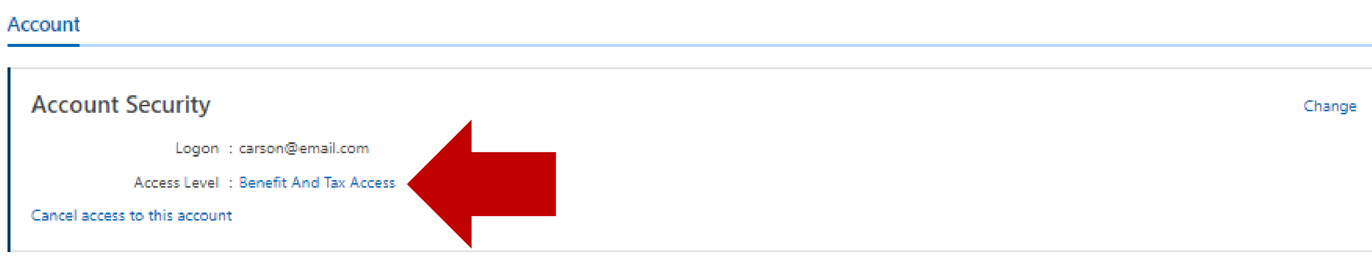


Step 3 — Select the current level of access hyperlink.

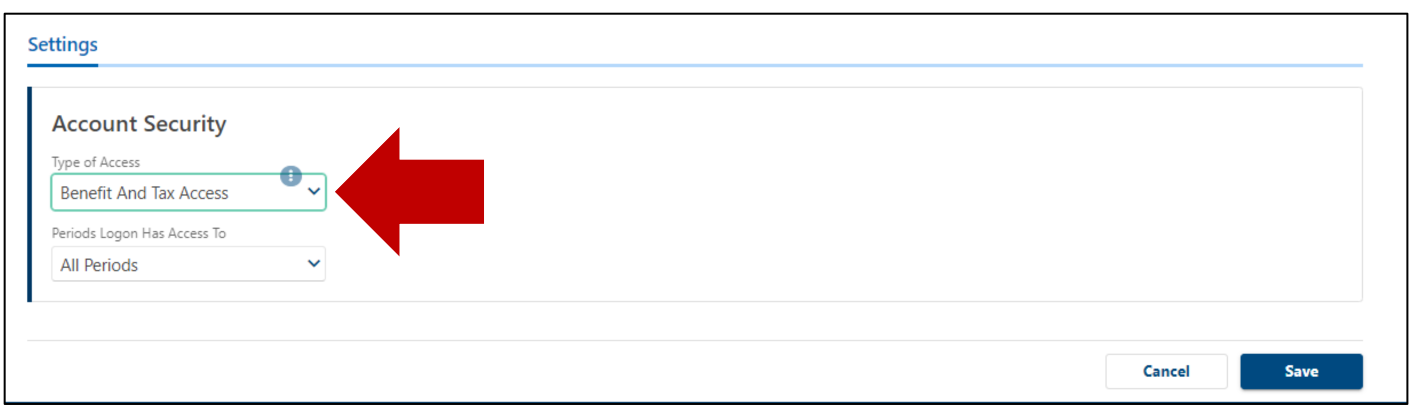
- In this example, “File Tax Reports and Make Payments.”



Step 4 — In the Account Security box, select the Change hyperlink in the upper right-hand corner.

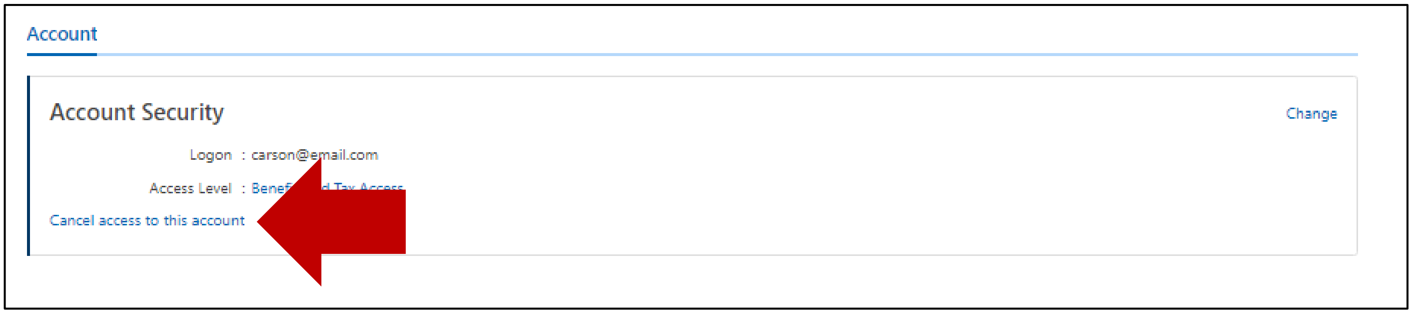


- In this example, this employee needs to file payroll reports and view benefits questionnaires, so they need both Benefit and Tax Access.
- Choose **benefits and tax access** from the drop-down menu. Select **Save**.



Step 5 — On the Manage Access screen you can see their new level of access.

- If they no longer need account access, select **Cancel Access**.



You're done! You have just learned how to add or request access to benefits information. We've also shown you how to give an employee or TPA access to your business account and benefit access, and how to allow an employee or TPA who already has access to your Frances Online business account to see benefits information and respond to questionnaires on your behalf.