PEO User Guide

UI eServices for Employers

February 2025

Table of Contents

Introduction 2

How to Set Up Access 2

Step 1 – Create an Okta account and verify your email address 2

Step 2 – Connect Okta to UI eServices for Employers 3

Introduction to eServices 3

How to Send Quarterly PEO Client Lists 5

Send a Secure Web Message 5

Client List Format 6

How to Send Client Initiation/Termination Forms 6

Register a PEO Client for a UI Account Number 8

Determine if an Account Exists 8

Where to Register for a UI Account Number for a Client 8

Registration Instructions and Notes for PEO clients 9

Inactivating Existing UI Account for a New PEO Client 11

What if I had client payroll while I was not licensed? 11

Additional Resources/Contacts 12

Introduction

This guide is written specifically for Professional Employer Organizations (PEO), operating in Montana, as a tool to guide them through PEO services available within UI eServices for Employers (eServices).

The section How to Send Client Initiation/Termination Forms highlights a new process for submitting forms to the Montana Department of Labor & Industry. The new process **replaces the previous method** of emailing Client Initiation/Termination Forms to the PEO Unit and/or Unemployment Insurance (UI). We are discontinuing use of emails for submitting these forms as it created inefficiencies for processing and was not secure. Going forward, everything should be done through UI eServices for Employers (eServices) and UI will ensure the department's PEO Unit has access to the information received (i.e. you no longer need to send it to both places).

How to Set Up Access

The state of Montana uses the Okta access management software to authenticate users and provide access to many state services, including UI eServices for Employers (eServices). If you do not already have an Okta account for other state of Montana services, logging into UI eServices for Employers for the first time is a two-step process:

- Step 1 – Create an Okta account and verify your email address
- Step 2 – Go to uieservices.mt.gov and connect UI eServices for Employers to Okta

Please note: It is very important you fully complete Step 1 before attempting Step 2. Okta and UI eServices for Employers are two separate systems. This one-time connection process will allow you to access eServices, using your Okta credentials (username and password) going forward but attempting to connect to eServices before activating an Okta account will result in your inability to access eServices.

If you already use Okta for other state of Montana services and know your username and password for it, you can skip directly to Step 2. If you do not know your username or password for Okta, see the Frequently Asked Questions (FAQ) provided on eServices for more information on what to do.

Step 1 – Create an Okta account and verify your email address

- Navigate to uieservices.mt.gov
- Click the Sign in with Okta button
- Scroll down and click the "Don't have an account? Sign Up." link
- Enter your email address (which will be your username)
- Create your Okta password (do not use any special characters)
- Click the Sign-Up button

Part of the Okta account set up is verifying your email address. Click the Set-up button under email and you should receive an email from Okta within a few minutes (check your spam or junk files if you don't see it right away). **You must follow the instructions in the email to complete your Okta account set up.**

An Okta security question is also required. Click the Set-up button under security question and select your security question from the drop-down menu. Once completed, click the Continue link.

Step 2 – Connect Okta to UI eServices for Employers

After verifying your email and setting up a security question for Okta, you should be redirected back to eServices and prompted to Connect Okta to eServices. If for some reason you are NOT redirected (or users who created Montana Okta credentials previously), navigate to uieservices.mt.gov, click the Sign in with Okta button and enter your Okta username and password.

Follow the steps to connect your eServices profile to your Okta account:

- Select the option "No, I have never used eServices".
- In the remaining steps you will be asked a series of security questions regarding your Montana UI Account. It would be helpful to have the last quarterly UI report filed for your business on hand.
- Assuming all UI Account security questions are answered correctly, your Okta account will be connected to your eServices profile, and you can access your UI account.

The above process is a one-time process for accessing eServices for the first time. Once your UI eServices for Employers profile is connected to your Okta account, you will simply go to uieservices.mt.gov and sign in using your Okta credentials (email address and Okta password) to access UI eServices for Employers.

Introduction to eServices

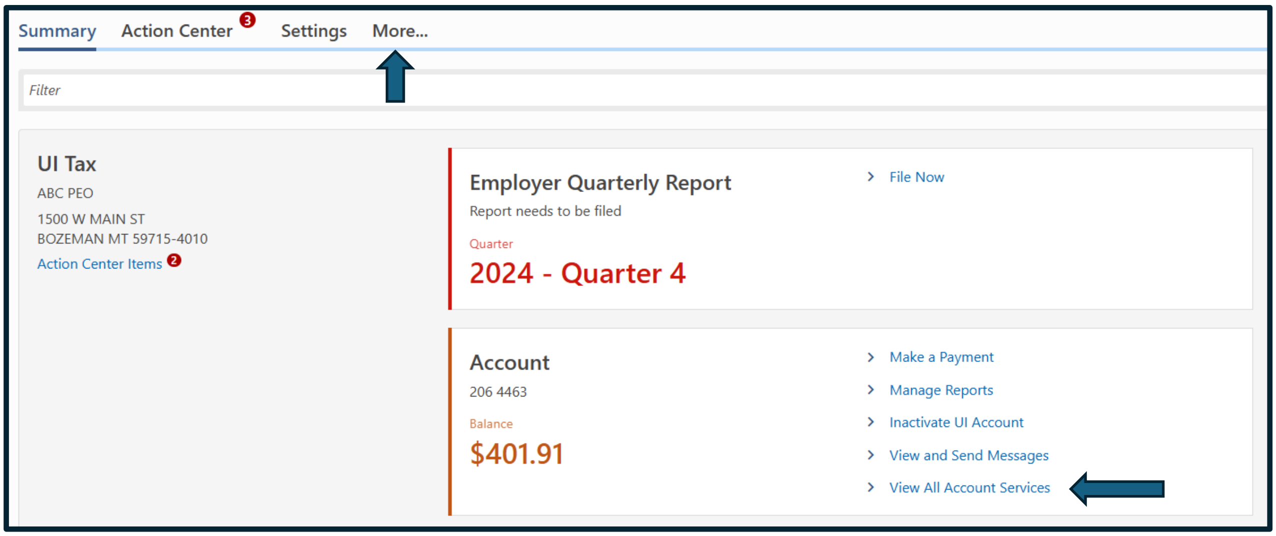
UI eServices for Employers (eServices) has numerous levels (Customer, Account, Quarter, etc.) and is sorted by tabs and panels. Panels are the individual sections (boxes) on a respective tab. Depending on your access level, you may or may not see every link depicted in screenshots within this handbook. If you are missing access you need, contact our eServices Customer Support Team at (406) 444-3834 for assistance.

If your eServices web logon is connected to multiple PEO accounts, when you log in you will see a list of all the PEO customers (accounts) linked to your web logon. Click the name of a PEO to access the account **Summary** tab for that PEO. If your logon is only connected to one PEO account, you will be taken directly to the Summary tab of your account when you sign in.

- If you are someone who administers multiple PEO accounts in Montana and would like more information on how to connect all your accounts to one eServices web logon, contact our eServices Customer Support Team at (406) 444-3834.

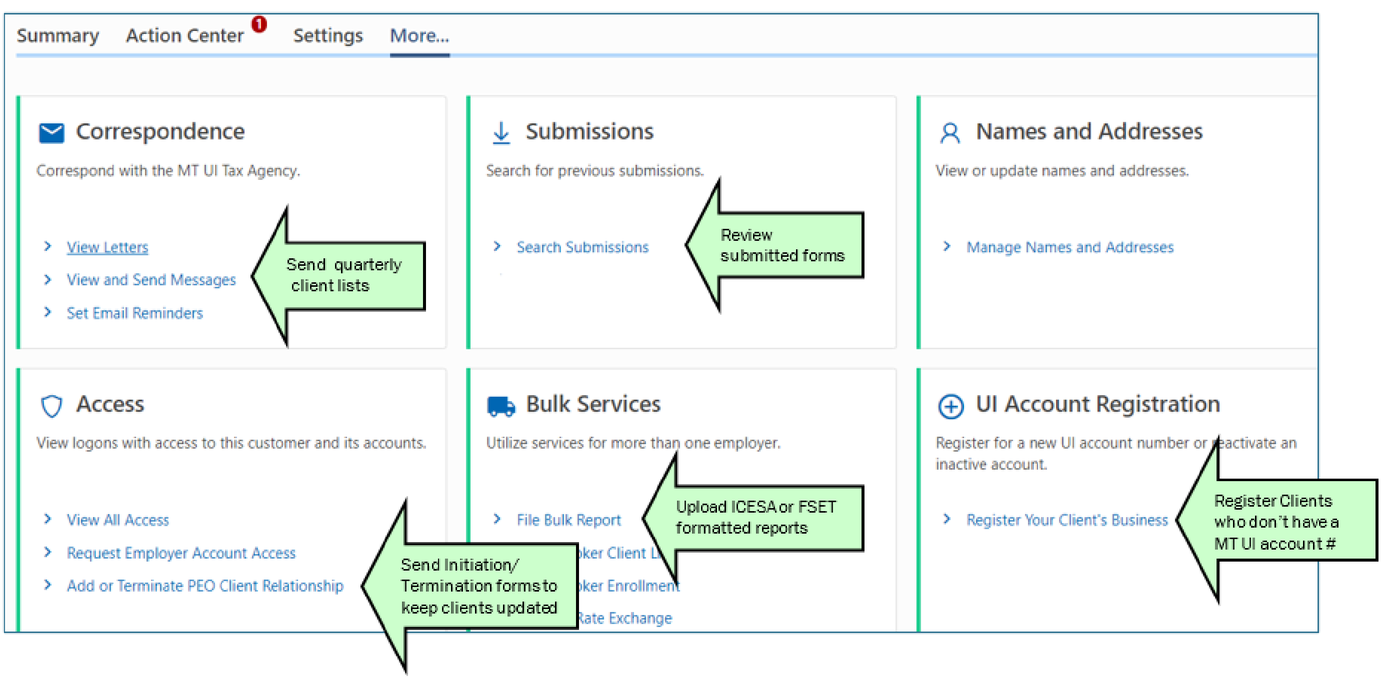
Montana Department of LABOR & INDUSTRY

Once logged into eServices and on the **Summary** tab of the PEO account you are needing to submit information for, there are multiple ways to navigate to PEO and other services. You can select (click) either the **More...** tab or the **View All Account Services** link in the Account panel.



The **More...** tab (depicted below) will have most of what a PEO will need, including links to:

- Submit PEO Client Lists (via a secure web message),
- Seach previous submissions,
- Upload Client Initiation/Termination Forms,
- Register clients who don't have a UI account number, and
- File quarterly reports using ICESA or FSET bulk filing formats.



How to Send Quarterly PEO Client Lists

As a PEO, you are required to submit PEO client lists every quarter. These lists are reviewed in conjunction with our Rating process. If your PEO account has less than three full years of experience, the industry rate which matches the majority of your clients' payroll will be assigned to your PEO account instead of the non-classified rate. For most PEO this is a significant savings as the non-classified rate is usually 2% (or above) and most industry-rates are around 1.00%. If your account has more claims charges than taxes paid in, it will be assigned a deficit rate.

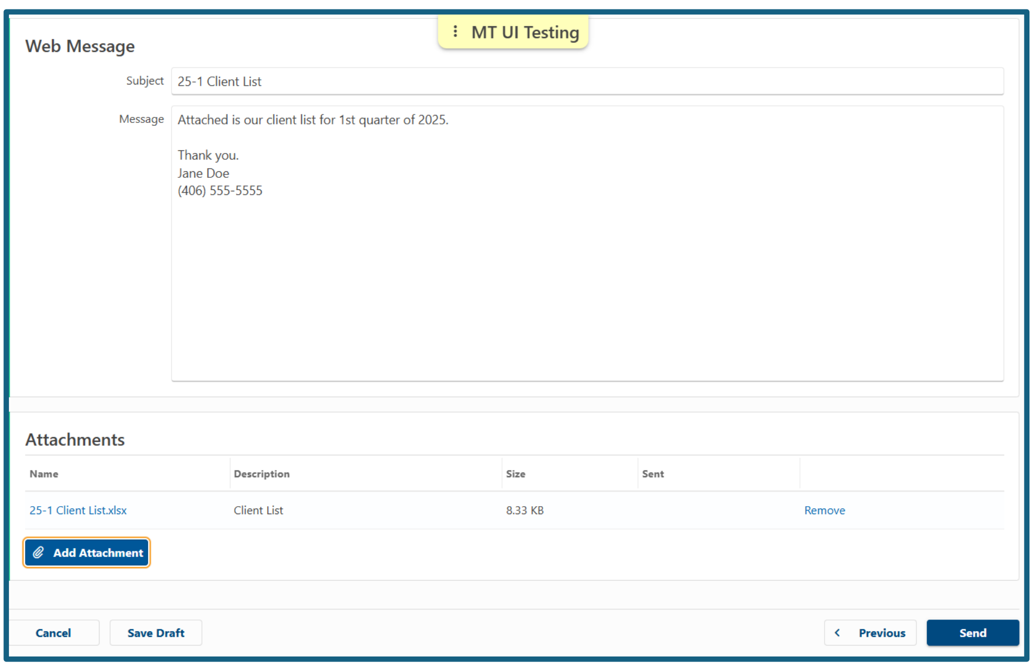
Send a Secure Web Message

Submitting quarterly PEO Client lists is easy with UI eServices for Employers (eServices) and secure web messaging. Log into eServices, navigate to PEO account Summary and the **More...** tab and:

- Select the **View and Send Messages** link in the correspondence panel,
- Click **Send a Message** (upper right-hand corner),
- Select **UI Tax Account** as the message category, and
- **PEO Client List** as the message type.

Web messages look a lot like sending an email, but they are secure and are sent directly to the team responsible for handling them (based on message category and type):

- In the **Subject** line of the web message, identify the year/quarter for the client list.
    - Example: 24-1 Client List
- In the **Message** section, include your name and phone number in case we have questions.
- Click **Add Attachment** at the bottom, to upload the client list.
- Click **Send.**



Client List Format

We have a PEO Client List template available in Excel but will accept other formats as well.

If using your own format, your client lists should summarize your active Montana clients by Federal ID, Name, and their initiation date. Then a second list should list the employees on the quarterly report for each client.

To request our client list template, send a secure web message through eServices and we will populate a template with a list of the clients we currently have on record for you, so you can determine which clients need initiation or termination forms.

After review of submitted PEO Client Lists, we may request you submit client initiation or termination forms through eServices for any client(s) we do not already have the respective form on file.

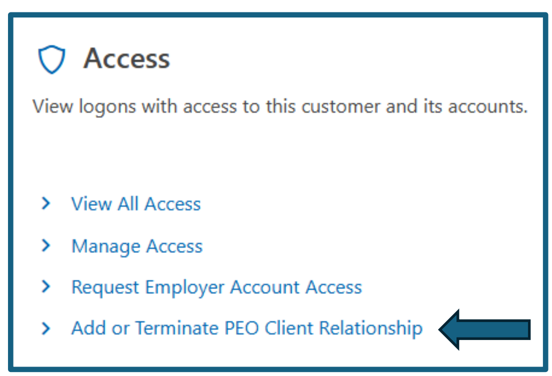
How to Send Client Initiation/Termination Forms

IMPORTANT: This process replaces the previous method of emailing Client Initiation/Termination Forms to the Montana Department of Labor and Industry PEO Unit and Unemployment Insurance (UI).

We are discontinuing use of emails for submitting PEO Client Initiation/Termination forms as they create inefficiencies for processing and are not secure. Going forward, everything should be done through UI eServices for Employers (eServices). Once submitted through eServices, UI will ensure the PEO Unit has access to all Client Initiation/Termination forms (i.e. you no longer need to send them to both). And our new process will automatically update the respective UI accounts and attach the form to the proper PEO and client UI accounts after it is reviewed.

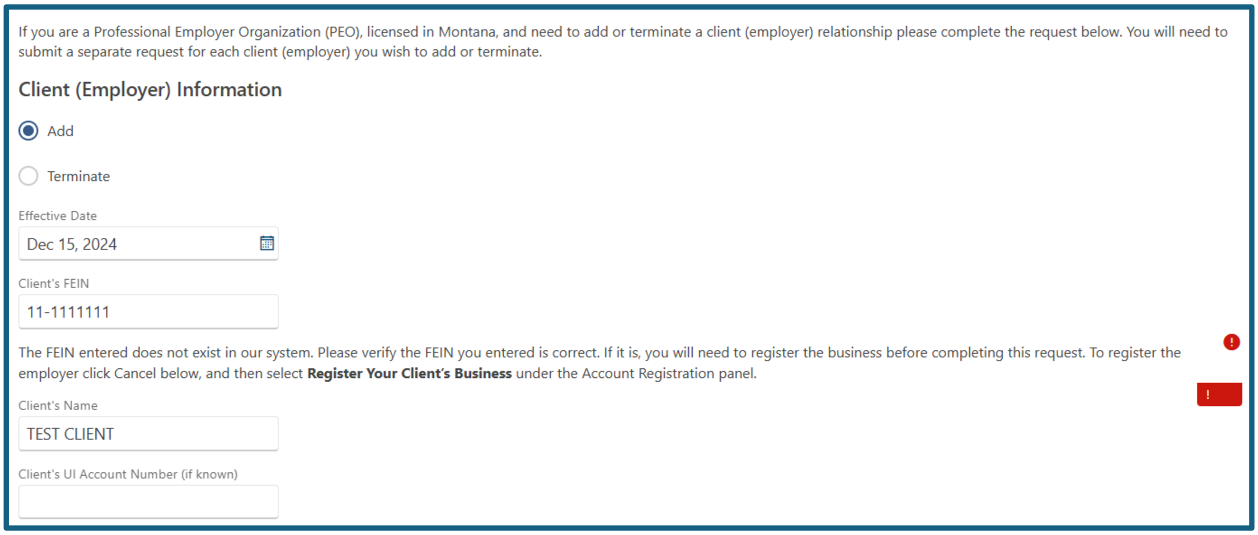
To submit PEO Client Initiation/Termination Forms, log into **UI eServices for Employers** at uieservices.mt.gov:

- If your eServices web logon is linked to more than one PEO account, select the PEO you wish to submit forms for to open the **Summary** tab for that PEO. If your web logon is linked to only one account, it will automatically open to the Summary tab.
- Select the **More...** tab,
- Click the **Add or Terminate PEO Client Relationship** link in the Access panel,



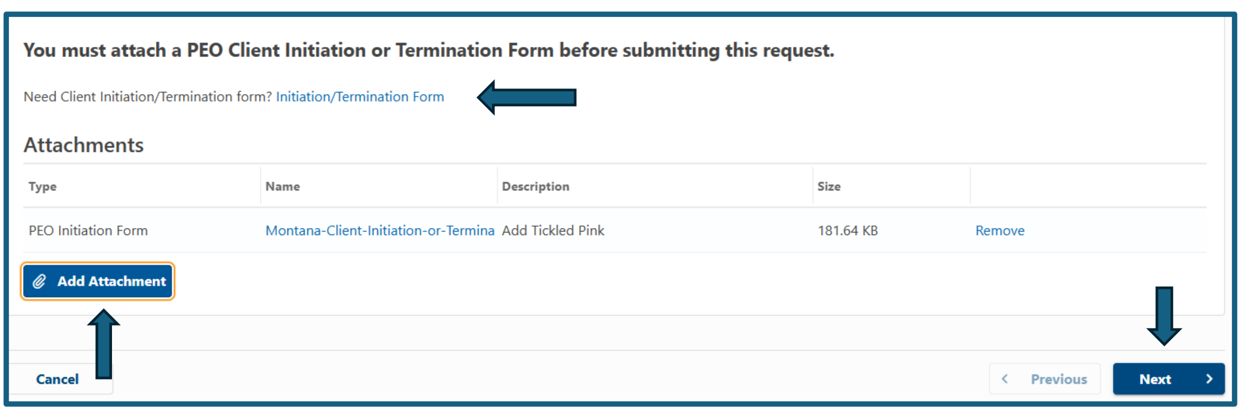
In the **Client (Employer) Information** section of the request:

- Indicate if you want to **Add** or **Terminate** the client,
- Enter the **Effective Date** of the change,
- Enter the **Client's FEIN** (federal identification number), and
- Enter **Client's Name** (business name).
- The Client's UI Account Number field is optional however, all clients must be registered and have a Montana UI account set up with their basic demographic and NAICS information. If you enter a FEIN not registered in our system, you will receive a message directing you to cancel the request and **Register Your Client's Business** first. PEO Client UI accounts will be inactive but linked to the respective PEO.



Under the Attachments section:

- If you need a copy of the most up-to-date Initiation/Termination Form you can click the blue hyperlink.
- Click **Add Attachment**, to upload a completed form.
- Click **Next**



- Click **Submit** to Confirm Submission.

Register a PEO Client for a UI Account Number

All PEO clients must have an individual UI account which has the ownership, contact information, NAICS code, and payroll contact information. PEO client accounts will be linked to the PEO's UI account and remain inactive for purposes of quarterly reports, tax payment, and claims. When sending a Client Initiation form, you will need to determine if we already have an account set up for the employer who may have used another PEO or previously reported their own payroll.

Determine if an Account Exists

There are a couple of ways to determine if a new client already has a Montana UI account number:

- Try to add them through the Add/Termination process (see How to Send Client Initiation/Termination Forms). If the client was reporting their own payroll to Montana prior to becoming your PEO client, their Federal ID will be in our system. If it is not, a message will pop up letting you know we have no registration using that Federal ID.

- If they were the client of a different PEO or you do not know if they have ever had a Montana UI account, call our Registration Team at (406) 444-3834. We will check their status and provide their account number or ask you to register for an account.

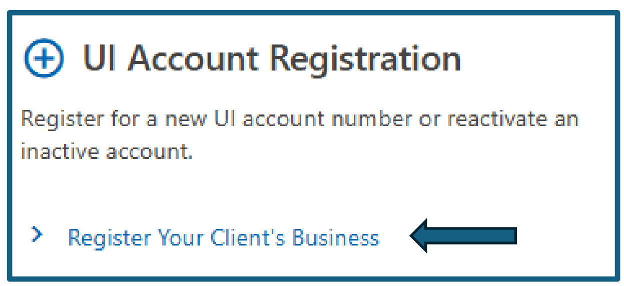
If you need to register the client for a UI account number, please pay close attention to the instructions below as there are some important differences between registering a PEO client's account versus a regular employer.

Where to Register for a UI Account Number for a Client

Log into UI eServices for Employers (eServices) and navigate to the account Summary tab of the PEO account:

- Select the **More…** tab

- Select the **Register Your Client's Business** link in the UI Account Registration panel.



Registration Instructions and Notes for PEO clients

- **Check the box attesting you are a third party (not the actual employer)** completing the registration and click Next.

- **Enter the client's legal business name, FEIN, and client's contact information.** Enter the client's contact information, not the PEO staff representative assigned to the client. PEO contact information can be entered later, in this step we need contact information for the client in case we have questions for them. If you receive a message the Federal ID is already registered, call our Registration Team at (406) 444-3834 and we will let you know if you should continue the registration or not. In some cases, you will need to reactivate an old account number to update current information.

- **Provide the Client's mailing address.** Be sure to click the "Click here to verify address" link before clicking Next to avoid an error message.
  - If the mailing address you enter is outside the state of Montana, you will be asked in the next step if the account is being added to report Remote Workers performing services (working) in Montana and if so, how many.

- **Provide the Client's physical address** (if different than mailing). If the mailing address you enter is in Montana, and the physical address is the same, answer Yes and select Next (there is no need to enter the same address twice).
  - If the mailing address you entered is NOT in Montana, you will be required to provide a Montana physical address.

  - If the only work location in Montana is that of a remote worker, fill in the address of the remote worker. We do not use physical addresses for contacting business, physical addresses are used to confirm the business should be reporting to Montana (work is performed here) and for employment statistics.

- **Answer NO to the question about additional Montana locations.**

- **Answer NO to the next two questions regarding the benefit mailing addresses for benefit charges/claims.** Since Montana is a PEO level reporting state, all correspondence will be sent to the mailing address listed on the PEO's UI account.

- **Organizational Details.** Select the client's organization type and state of incorporation. The date is not required.

- **Business Type.** Select the **Client of a Professional Employer Organization (PEO)** option only.
  - **Note**: Do not check other options such as "Non-profit organization" even if the client is a non-profit. That option is designed to ask an employer if they wish to be reimbursable or not, which does not apply to PEO clients.

- **PEO Client Subjectivity.** Enter the PEO's name and FEIN (federal id). This will link them to the PEO UI Account as a client.

- **Unemployment Insurance Subjectivity.** Enter the date the PEO first issued checks in Montana for this client. Do NOT enter the date of their first payroll paid by another PEO or an old account.
  - Answer **YES** to the questions about if payroll will exceed $1000 and the FUTA requirement
  - Answer **NO** to the question about if they must pay UI tax to states other than Montana (for our purposes this isn't relevant for PEO clients).

- **Leave the Wages Paid Each Year section blank.**

- **Business Activities and NAICS code.** This section is used to assign a NAICS code to the client. Their NAICS code is used for assigning rates for PEO's based on their client's payroll. It is also used for statistical purposes. If the client ever terminates with the PEO, the information will be used to assign their rate.
  - Select (click) the blue **Click here to describe your business activities** bar (link) and then click "**+Add Business Activity**". Use the text boxes provide to describe the client's business activity. Please do not be too broad, the more detail the better. For example, explain the type of construction such as "concrete contractor", general contractor, commercial, electrician, etc.

  - Select (click) the blue **Click here to select your activity code (NAICS)** bar to enter the client's NAICS code. Type the NAICS code (if known) or one keyword to search for a NAICS code, then select the appropriate code from the Results list and answer YES to populate the NAICS information.

- **Responsible Parties.** This section requires ownership information, and a payroll contact for the client's company. Do not enter ownership or payroll contact information for the PEO.
  - **Client Payroll Contact.** If a client terminates with your PEO, we need the name of at least one person in the client's payroll contact who can provide information to the UI division whether it is for a tax or claims issue. Select Accountant, Report Preparer, or if it's the owner, then select the appropriate title for them and include the phone, address, and email information for the contact.

  - **Responsible party.** You must enter at least one owner, partner, member, or officer for the client's business, including their SSN. If you absolutely cannot obtain the SSN, select the appropriate Title from the dropdown, and then select "Business" from the Role dropdown, and enter the FEIN of the business. Complete the remaining required fields with as much information as you have for the responsible party.

- **Review the Summary information, click Next, and then Submit.** If you receive an error when submitting the registration, the most common error is an unverified address. Use the navigation ribbon or the "Previous" button to return to the address sections and double check they have been verified. If that doesn't resolve the error, contact our eServices Customer Support or Registration team at (406)444-3834.

Upload the Client Initiation form after you are notified the PEO client registration is processed. Our staff review all new registrations and will notify you by email or an eServices message when the registration had been processed and is ready for you upload the Client Initiation form (see How to Send Client Inactivation/Termination Forms). There will be no rating or claims correspondence ever generated for the client's account while they are your client.

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Inactivating Existing UI Account for a New PEO Client

Occasionally, you may have a new client(s) who has been reporting their payroll to Montana (before becoming a PEO client) and they need to close or inactivate their UI account. Before you can add them as a PEO Client, their UI account needs to be inactivated as of the date of **their last payroll** to ensure they don't receive notices for delinquencies and to prevent claim issues.

We prefer for the Client either call our Registration Team at (406) 444-3834 or use UI eServices for Employers (eServices) to submit the inactivation request by selecting **View All Account Services** on the Summary tab Account panel and then selecting **Inactivate UI Account** under the Account Maintenance panel. However, if you have an authorization form or Power of Attorney (POA) for the client and know the date of the last payroll, you may let us know by sending us a secure message via eServices.

To send a secure web message, log into eServices and navigate to the **More…** tab:

- Select the **View/Send Message** link in the Correspondence panel,
- Click **Send a Message** (upper right-hand corner),
- Select **UI Tax Account** for the message category, and
- Select **Close or Reactivate Account** as the message type.

In the subject line, provide the client's name, client FEIN, and Montana UI account number.

In the message section, provide the date of the last payroll and include a phone number and email address for the Client's payroll contact. Also include their current mailing address if known. Attach the authorization, POA, or any other supporting documentation to the message before sending. We will contact the client to confirm the inactivation and may discuss other issues with them such as any current credits or balance due.

What if I had client payroll while I was not licensed?

Montana is a PEO-level reporting state for UI purposes. However, on rare occasions, a PEO has signed a contract with a client without being aware of the Montana licensing requirements. In those cases, the payroll must be reported under the client's UI account number until the PEO's license is approved.

If the client already has an active UI account, complete a Third-Party Authorization form available on UI eServices for Employers (eServices). The form must be signed by the client. Submit the form to our office through eServices by navigating to the **More…** tab and selecting **Request Employer Account Access** link under the Access panel. Once the authorization form is reviewed and approved by our staff, we will link the client's active UI account to your web logon.

If the client does not already have a Montana UI account, you can register them as a regular employer through eServices using the same steps outlined in Registration and Notes section above, EXCEPT do not check the box indicating they are a PEO client. Until your license is approved the Client must have a regular UI account with wages reported under their account number (this account will be cancelled once your PEO license is approved). Once the client has an active UI account, you will need to complete and submit a Third-Party Authorization form as described above.

Montana requires all quarterly reports to be filed electronically (24.40.1609 ARM). We highly recommend using eServices to file reports to ensure accuracy. UI eServices for Employers will reflect the correct UI rate for your client and will correctly calculate excess wages based on their reported payroll before they were a PEO client. UI benefit claims associate to the client's account can also be administered through eServices with the receipt and response to our electronic fact-finding.

Once your PEO license is approved, you can notify us of the final payroll date for the Client and we will inactivate their UI account.

If you need additional help registering a client for a regular UI account or completing and submitting an authorization form, contact our Registration or eServices Customer Support teams at (406) 444-3834.

Additional Resources/Contacts

As discussed throughout this guide, the process of submitting PEO Client Lists and Client Initiation/Termination forms can now all be handled through UI eServices for Employers. Please discontinue the practice of sending these forms to the PEO Unit and/or UI by any other method (emails, private portals, file transfer service, etc.).

For assistance with PEO license requirements, deadlines, and/or renewals, contact the Professional Licensing Customer Service team at (406) 444-6880 and ask for the PEO unit or email dlierdpeo@mt.gov.

For questions regarding submitting PEO client lists, client forms, or your current client list contact our UI Registration Team at (406) 444-3834 or send a web message through eServices (select the **UI Tax** category and **PEO Client List** for the message type).

For assistance accessing or navigating UI eServices or Employers or more information on electronic filing options, review the Montana UI Contributions E-Filing Handbook or contact our eServices Customer Support team at (406) 444-3834.

For more information about our rating process, see our **Employer Handbook** or contact a Rating Specialist at (406) 444-3834.

We look forward to serving you!