Welcome to training on how to Manage contact persons and ESS users on the Administration feature of the Employer Self-Service portal. Whether you can access these functionalities or not is based on your security profile.

How Do I Add a Contact Person?

You can add a contact person by navigating to the **Contact Persons** screen by clicking on **Admin**, and then selecting **Contact Persons**.

You will be directed to the **Contact Persons** page. Click on **Add Contact Person**.

Fill in the required fields on the form, which are denoted by red asterisks. You may also include any additional information. Enter in the **First Name** of the contact person. Enter in the **Last Name**. For this example, we will also include the job title.

Select the **Office Location** from the options from the drop-down menu.

Enter your **Email**.

Enter in the **Work Number**.

Click on the **Contact Type**.

Click **Submit**.

A confirmation message appears that the contact person has been successfully saved. Click **Continue**.

You will be returned to the **Contact Persons** screen where you will see the added contact.

How Do I Edit a Contact Person?

You can edit a contact person by navigating to the **Contact Persons** screen by clicking on **Admin**, and then selecting **Contact Persons**.

You will be directed to the **Contact Persons** page. Click on **Edit**.

Update the contact person information. In this example, we will update the **Office Location**.

Click on the **Office Location** drop-down. And click on the new location.

Click **Update**. A confirmation message appears that the contact person has been successfully saved. Click **Continue**.

You will be returned to the **Contact Persons** screen where you will see the edited contact.

How Do I Delete a Contact Person?

You can delete a contact person by navigating to the **Contact Persons** screen by clicking on **Admin**, and then selecting **Contact Persons**.

You will be directed to the **Contact Persons** page. Click on **Delete**.

A message will appear asking if you are sure you want to delete the contact. You can confirm that you want to delete the office location by clicking **OK**.

You will be returned to the **Contact Persons** screen, and the contact will no longer be listed.

How Do I Override Primary Contact for Contact Type?

You can override the primary contact for a contact type, by navigating to the **Contact Persons** screen by clicking on **Admin**, and then selecting **Contact Persons**.

You will be directed to the **Contact Persons** page. Click **Edit** for the person for whom you'd like to label as the new primary contact.

Scroll down to the **Contact Types**.

Select the **Set as Primary Contact** checkbox. In this example, we will choose to make this contact person a primary contact for the **Reporting Official** contact type.

Click **Update**.

A confirmation message displays letting you know the primary contact exists, but has been updated.

Scroll down and click **Update** again.

A separate confirmation screen displays. Click **Continue** to go back to the **Contact Persons** screen.

On the **Contact Persons** screen, you will see a green checked sign display next to the contact type for which the person is a primary contact.

How Do I Add a New User?

You can add a user by navigating to the manage users screen by clicking on **Admin**, and then selecting **Manage Users**.

This screen displays all of the ESS users and their roles. To add a new user, click **Add User**.

Select a contact person from the **Contact Person** drop-down menu (Note: This drop-down menu populates from the people listed on the **Contact Person** screen).

Enter a unique **User ID** for the person (Note: The user ID must be between 5 and 20 characters, using Uppercase letters, lowercase letters, and numbers 0 to 9).

Select the checkbox next to the role or roles you would like to assign.

The email address for the user automatically displays. The **Status** of the user is automatically set to **Active**. Click **Submit**.

A confirmation message displays to confirm the addition of a new user (Note: Three separate emails are sent to the new user, each with the user ID, temporary password, or PIN. The user must sign into ESS within 72 hours with the log in information emailed to them before the information expires). Click **Continue**.

You will be returned to the **Manage Users** screen. And the new user will appear in the list.

How Do I Edit a User?

You can edit a user by navigating to the manage users screen by clicking on **Admin**, and then selecting **Manage Users**.

Click on the particular *User ID* of the user you wish to edit.

The **Edit User** screen displays. Here, you can edit the user's ESS roles.
In this example, the user is no longer in an ESS Employer Reporting role so the checkbox is clicked to uncheck that option.

Since the user is now in the ESS Staff role, that box is selected.

Click **Update**.

A confirmation message displays that the user has been successfully saved. Click **Continue**.

You will be returned to the **Manage Users** screen. And the changes that have been made will appear in the list.

How Do I Deactivate a User?

You can delete a user by navigating to the manage users screen by clicking on **Admin**, and then selecting **Manage Users**.

Click on the particular user id that you wish to deactivate.

To deactivate the user, click on the checkbox next to active to uncheck that option.

Click **Update**.

A confirmation message displays that the user has been successfully saved. Click **Continue**.

You will be returned to the **Manage Users** screen. And the contact person will no longer be listed as **Active**.

How Do I Reset a User's Password?

You can reset a user's password, by navigating to the **Contact Persons** screen by clicking on **Admin**, and then selecting **Manage Users**.

On the **Manage Users** screen, click the *User ID* link for the user who needs this or her password reset.

The **Edit User** screen displays, select the **Reset Password** checkbox to reset the user's password.

Click **Update**.

A confirmation message displays that a new password has been generated and sent to the user's email account. Click **Continue**.

You will return to the **Manage Users** screen.

How Do I Reset a User's PIN?

You can reset a user's RSA PIN, by navigating to the **Contact Persons** screen by clicking on **Admin**, and then selecting **Manage Users**.

On the **Manage Users** screen, click the *User ID* link for the user who needs his or her PIN reset.

The **Edit User** screen displays, select the **Reset PIN** check box to reset the user's PIN.

Click **Update**

A confirmation message displays that a new RSA pin has been generated and sent to the user's email account. Click **Continue**.

You will return to the manage users screen.

For additional information or assistance, please contact an Employer Services Representative (ESR) at 334-517-7005 or employer.services@rsa-al.gov.