INSTRUCTIONS FOR CONTACT PERSONS SCREEN IN THE ESS PORTAL

To **add** an ESS contact person the ESS Portal Administrator(s) will select the ADMIN tab > Manage Contact Persons > Add a Contact Person. *[If the contact person being entered needs to have access to the ESS portal the ESS Portal Administrator(s) will also need to add them under Manage Users.]*

The following information is required to create a contact person.

- First Name
- Last Name
- Job Title
- Office Location
- Email Address
- Work Phone Number

Once the ESS Portal Administrator(s) has entered the information above select the appropriate Contact Type for that contact.

- Agency Head
    - Receives ad-hoc correspondences from RSA
- Disability Contact
    - Receives ad-hoc correspondences from RSA
- Enrollment Coordinator
    - Receives ad-hoc correspondences from RSA
- Human Resource Director
    - Receives ad-hoc correspondences from RSA
- IT
    - Receives ad-hoc correspondences from RSA
- Office Coordinator
    - Receives ad-hoc correspondences from RSA
- PEEHIP Clerk
    - Receives ad-hoc correspondences from RSA
- Reporting Official
    - Receives all system generated communications related to the submission of enrollment and contribution reports. This includes balance, post, and Employer Reporting Packets.
- Retirement Certification
    - ESS users must be assigned this contact type to receive emails regarding Retirement Certifications. The user must have the role of ESS Administrator or ESS Staff to access the Employer Certification screen in the ESS Portal.
- RSA-1
    - Receives ad-hoc correspondences from RSA
- Service Purchases
    - ESS users must be assigned this contact type to receive emails regarding Service Purchases. The user must have the role of ESS Administrator or ESS Staff to access the Employer Certification screen in the ESS Portal.

- Withdrawal Certification
  - ESS users must be assigned this contact type to receive emails regarding Withdrawal Certifications. The user must have the role of ESS Administrator or ESS Staff to access the Employer Certification screen in the ESS Portal.

An employee should be set as a "Primary Contact" if they are the primary contact for your agency for that specific job duty. There can only be one Primary Contact for each Contact Type.

To **edit** a contact person, ESS Portal Administrator(s) will select the ADMIN Tab > Manage Contact Persons > Edit > Edit, update the information as necessary > Update.

To **update** an existing employee's contact type who is not a primary contact, select Edit next to that employee's name, update the information as necessary, then select Update.

To **delete** a contact person that is not an ESS User, the ESS Portal Administrator(s) will select the ADMIN tab > Manage Contact Persons > Edit > Delete

To **delete** a contact person who is an ESS user the ESS Portal Administrator(s) will need to select the ADMIN tab > Manage Users > Edit, then inactivate their ESS User account. Then select the ADMIN tab > Manage Contact Persons > Edit > Delete.

If the ESS Contact Person you are trying to delete is marked "Primary Contact" you will need to designate or add another employee as "Primary Contact" for that contact type before you can delete them.

A screen shot of the updated Contact Types is shown below:

Contact Type(s)	
☐ Agency Head	☐ Set as Primary Contact
☐ Disability Contact	☐ Set as Primary Contact
☐ Enrollment Coordinator	☐ Set as Primary Contact
☐ Human Resource Director	☐ Set as Primary Contact
☐ IT	☐ Set as Primary Contact
☐ Office Coordinator	☐ Set as Primary Contact
☐ PEEHIP Clerk	☐ Set as Primary Contact
☐ Reporting Official	☐ Set as Primary Contact
☐ Retirement Certification	☐ Set as Primary Contact
☐ RSA-1	☐ Set as Primary Contact
☐ Service Purchases	☐ Set as Primary Contact
☐ Withdrawal Certification	☐ Set as Primary Contact