

Finding Rate Information on eServices

How do I find my rate information?

1. Log into *UI eServices for Employers*
2. Click the UI account number link

holter20

EXAMPLE CAFE **NAMES AND ADDRESSES** **I WANT TO...** **Profile**

FEIN	32-1321321	Legal Name	EXAMPLE CAFE	View Employer Handbook
Balance	\$0.00	Mailing Address	1315 LOCKEY AVE HELENA MT 59601	Add Employer's Account Access
				Register a new UI Account
				Read UI Quarterly Newsletters

ACCOUNTS¹ **REQUESTS⁰** **MESSAGES⁰** **LETTERS⁰** **BULK SERVICES**

MY ACCOUNT¹

UI TAX ACCOUNT **Hide History** **Filter**

Account Id	Account Type	Name	Emp Class	Address	Balance
205 6287	UI Tax	EXAMPLE CAFE	Exp Rated	1315 LOCKEY AVE HELENA MT 59601	0.00

3. Click the "Rate & Benefit Info" tab

TAX **NAMES AND ADDRESSES** **I WANT TO...** **Profile** **Accounts**

FEIN	32-1321321	Legal Name	EXAMPLE CAFE	View Employer Handbook
Experience Rated	205 6287	Mailing Address	1315 LOCKEY AVE HELENA MT 59601	Set Up Email Reminder
Balance	\$0.00			Make a Payment
Pending Request(s)	\$0.00	Payment Source	Setup	Read UI Quarterly Newsletters

FILE & PAY **RATE & BENEFIT INFO** **REQUESTS⁰** **ACTIVITY** **MESSAGES⁰** **LETTERS⁰** **ACCOUNT SERVICES**

RATE HISTORY **Filter**

Rate Year	Effective From	Effective To	Contribution Rate	Penalty Rate	AFT Rate	Total Rate	Experienced	Taxable Wage Base
2015	Jan 01, 2015	Dec 31, 2015	3.10	0.00	0.18	3.28	<input type="checkbox"/>	29,500.00

- a. View the rate year
- b. View the Effective From date (the effective start date of the rate)
- c. View the Effective To date (the effective finish date of the rate)
- d. View the Contribution Rate
 - i. Reimbursable employers do not pay a Contribution Rate so this field will be zero for Reimbursable employers
 - ii. To find out how the rate is calculated, please see our Employer Handbook: <http://uid.dli.mt.gov/Portals/55/Documents/Contributions-Bureau/dli-uid-ui010.pdf> or for current year information, see our website: <http://uid.dli.mt.gov/employers/employer-contribution-rates>
- e. View the Penalty Rate if one has been assigned to your account
 - i. Employers who have a balance due or have not filed all reports when rates are calculated in December will receive a **"penalty rate"**. A penalty rate is 50% higher than the computed rate. To avoid a penalty rate, an employer must pay all tax, penalty and interest due and file delinquent reports with payment of tax, late file penalties and interest by January 16, 2015.

- f. View the AFT Rate (Administrative Fund Tax)
 - i. Governmental class rated employers have AFT rate of 0.09
 - ii. Reimbursable class rated employers have AFT rate of 0.08
 - iii. Experience class rated employers have AFT rate of 0.18
- g. View the Total Rate (UI rate + Penalty Rate + AFT Rate)
 - i. The total rate is the rate used to calculate the tax due each quarter.
- h. View the Experienced check box
 - i. This box will be checked if the business has had three complete federal fiscal years of employment (October 1 to September 30).
 - ii. Please see our Employer Handbook for more information:
<http://uid.dli.mt.gov/Portals/55/Documents/Contributions-Bureau/dli-uid-ui010.pdf>
- i. View the yearly Taxable Wage Base
 - i. This is the amount of wages per employee you are liable to pay tax on each year.

I am a Third Party Accountant and my clients never give me their rate notices, what can I do to get the rate information?

There are a few ways within eServices to gain access to your client's rates.

1. Participate in the rate exchange through eServices by importing a file or manually keying in client information. The rate exchange process allows for client information to be keyed into the web page or a flat file to be imported into eServices. A return file, containing the rates per the client information submitted in eServices, will to be sent back to the TPA as a web message. For information on how to complete this task, please see "How do submit my fiscal rate information and retrieve the returned rate file?" below.
2. If you have access to each individual client account in eServices, click on the "Rate History" tab within the client account to view the rate information. For step by step instructions please see "How do I find my rate information?" above.

How do I participate in the fiscal rate exchange process?

1. An MOU must be signed and on file before your company can participate in the fiscal rate exchange process.
 - a. Go to our website: <http://uid.dli.mt.gov/employers/eservices/help>
 - b. Scroll to the Quarterly Fiscal Rate Exchange bullet
 - c. Click "Please download and complete the MOU" link
 - i. Complete section 1.1
 - ii. Complete section 11.3.2
 - iii. Complete section 13.1
 - d. Fax or email the signed MOU to us.
 - i. Fax: 406-444-1622
 - ii. Email: cbenjamin@mt.gov or ahislop@mt.gov

2. There are three ways to gain rate information in bulk by using the fiscal rate exchange process.
 - a. Uploading a new file
 - i. For file specifications, see our website:
<http://uid.dli.mt.gov/Portals/55/Documents/eServices/dli-uid-es012.pdf>
 - b. Keying client information into the web page
 - c. Retrieving rate information for previously submitted client information.

Note: Retrieving the rates using the Fiscal Rate Exchange is an overnight process (i.e. you provide the file one day and we'll send you the information the next day).

3. Uploading a new rate file
 - a. To do so, click on the "Bulk Services" tab.

EXAMPLE CAFE		NAMES AND ADDRESSES		I WANT TO...	Profile
FEIN	32-1321321	Legal Name	EXAMPLE CAFE	View Employer Handbook	
Balance	\$0.00	Mailing Address	1315 LOCKEY AVE HELENA MT 59601	Add Employer's Account Access	
				Register a new UI Account	
				Read UI Quarterly Newsletters	

ACCOUNTS¹

REQUESTS⁰

MESSAGES⁰

LETTERS⁰

BULK SERVICES⁰

MY ACCOUNT¹

UI TAX ACCOUNT						Hide History	Filter
Account Id	Account Type	Name	Emp Class	Address	Balance		
205 6287	UI Tax	EXAMPLE CAFE	Exp Rated	1315 LOCKEY AVE HELENA M	0.00		

- b. Click "Fiscal Rate Exchange" link.

ACCOUNTS⁰

REQUESTS⁰

MESSAGES⁰

LETTERS⁰

BULK SERVICES⁰

BULK SERVICES

Filter

[Bulk Report Filing](#)

Bulk report filing through FSET and ICESA

Fiscal Rate Exchange Request

[Fiscal Rate Exchange](#)

- c. Click "Option 2".
 - d. Click "Import".
 - e. Choose your file
 - f. Click the "Import" button.

FISCAL RATE EXCHANGE REQUEST

The Fiscal Rate Exchange Program is designed to allow authorized Employer representatives to submit account information for the Employers they represent, and in return, receive rates for those Employers.

A signed MOU (Memorandum of Understanding) with the Montana Department of Labor and Industry is required to participate in the Fiscal Rate Exchange program.

Please see our [Fiscal Rate Exchange file format specifications](#) and [MOU](#).

Once this request has been processed, a file containing the rate

To receive UI rate information, select an option below.

☐ Option 1: Receive rate information for a previously submitted request.

Select this option if you have imported a fiscal rate exchange request the rates for the same list of clients.

☒ Option 2: Receive updated rate information on an updated list of clients.

Select this option to import a new fiscal rate exchange file OR to manually enter the employer information.

Enter Employer information below or upload Employers using the "Import" button.

☒ Default View - Includes all required fields

☐ Detailed View - Includes additional optional fields

	State	UI Account ID	FEIN	Name

Import

Cancel

g. Click "Submit". This will submit the request to us.




☒ Option 2: Receive updated rate information on an updated list of clients.

Select this option to import a new fiscal rate exchange file OR to manually enter the employer information.

Enter Employer information below or upload Employers using the "Import" button.

☒ Default View - Includes all required fields

☐ Detailed View - Includes additional optional fields

	State	UI Account ID	FEIN	Name
	MT	2055969	987513213	GREENS PLANTS
	MT	2055965	313213213	DOGS HOSPITAL
	MT	2056010	985521321	KATHLEENS COUNTY

Import

Submit

4. Keying in client information into the web page

a. To do so, click on the "Bulk Services" tab.

EXAMPLE CAFE		NAMES AND ADDRESSES		I WANT TO...	Profile
FEIN	32-1321321	Legal Name	EXAMPLE CAFE	View Employer Handbook	
Balance	\$0.00	Mailing Address	1315 LOCKEY AVE HELENA MT 59601	Add Employer's Account Access	
				Register a new UI Account	
				Read UI Quarterly Newsletters	

ACCOUNTS ¹	REQUESTS ⁰	MESSAGES ⁰	LETTERS ⁰	BULK SERVICES
MY ACCOUNT ¹				

UI TAX ACCOUNT						Hide History	Filter
Account Id	Account Type	Name	Emp Class	Address	Balance		
205 6287	UI Tax	EXAMPLE CAFE	Exp Rated	1315 LOCKEY AVE HELENA M	0.00		

b. Click "Fiscal Rate Exchange" link.

ACCOUNTS ⁰	REQUESTS ⁰	MESSAGES ⁰	LETTERS ⁰	BULK SERVICES
BULK SERVICES				

		Filter
Bulk Report Filing	Bulk report filing through FSET and ICESA	
Fiscal Rate Exchange	Fiscal Rate Exchange Request	

- Click "Option 2"
- Data Enter Account Information into the Green Boxes below
- Click "Submit" button

NOTES: Participating in the fiscal rate exchange program will eliminate UI-5 and UI-5V forms from being sent in the mail. If you need copies of these forms to report and pay for your clients, please send a web message and we can send the proper documentation to you.

FISCAL RATE EXCHANGE REQUEST

The Fiscal Rate Exchange Program is designed to allow authorized Employer representatives to submit account information for the Employers they represent, and in return, receive rates for those Employers.

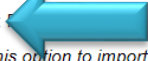
A signed MOU (Memorandum of Understanding) with the Montana Department of Labor and Industry is required to participate in the Fiscal Rate Exchange program.

[Please see our Fiscal Rate Exchange file format specifications and MOU.](#)

Once this request has been processed, a file containing the rate information will be provided to you via a web message.





To receive UI rate information, select an option below.

☐ Option 1: Receive rate information for a previously submitted fiscal rate exchange file.
Select this option if you have imported a fiscal rate exchange file previously and want to request the rates for the same list of clients.

☒ Option 2:  rate information on an updated list of clients.
Select this option to import a new fiscal rate exchange file OR to manually enter the employer information.

Enter Employer information below or upload Employers using the "Import" button.

☒ Default View - Includes all required fields ☐ Detailed View - Includes additional optional fields

	State	UI Account ID	FEIN	Name
	MT	2055969	987513213	Greens Plants 
	MT	2055965	313213213	Dogs Hospital
	MT	2056010	985521321	Kathi

Import


Submit 

5. Retrieving rate information for previously submitted client information

Note: An original client list must have been imported or keyed in before a file can be retrieved using this option.

a. To do so, click on the "Bulk Services" tab.

EXAMPLE CAFE		NAMES AND ADDRESSES		I WANT TO...	Profile
FEIN	32-1321321	Legal Name	EXAMPLE CAFE	View Employer Handbook	
Balance	\$0.00	Mailing Address	1315 LOCKEY AVE HELENA MT 59601	Add Employer's Account Access	
				Register a new UI Account	
				Read UI Quarterly Newsletters	

ACCOUNTS ¹	REQUESTS ⁰	MESSAGES ⁰	LETTERS ⁰	BULK SERVICES 
MY ACCOUNT ¹				

UI TAX ACCOUNT						Hide History	Filter
Account Id	Account Type	Name	Emp Class	Address	Balance		
205 6287	UI Tax	EXAMPLE CAFE	Exp Rated	1315 LOCKEY AVE HELENA M	0.00		

- b. Click "Fiscal Rate Exchange" link.

ACCOUNTS⁰ REQUESTS⁰ MESSAGES⁰ LETTERS⁰ BULK SERVICES

BULK SERVICES

Bulk Report Filing Bulk report filing through FSET and ICESA
Fiscal Rate Exchange Fiscal Rate Exchange Request

- c. Click "Option 1"
d. Click "Submit" button

FISCAL RATE EXCHANGE REQUEST


The Fiscal Rate Exchange Program is designed to allow authorized Employer representatives to submit account information for the Employers they represent, and in return, receive rates for those Employers.

A signed MOU (Memorandum of Understanding) with the Montana Department of Labor and Industry is required to participate in the Fiscal Rate Exchange program.

[Please see our Fiscal Rate Exchange file format specifications and MOU.](#)

Once this request has been processed, a file containing the rate information will be provided to you via a web message.

To receive UI rate information, select an option below.

- ☒ Option 1:  Information for a previously submitted fiscal rate exchange file.
Select this option if you have imported a fiscal rate exchange file previously and want to request the rates for the same list of clients.
- ☐ Option 2: Receive updated rate information on an updated list of clients.
Select this option to import a new fiscal rate exchange file OR to manually enter the employer information.

Import Submit

6. Downloading the return rate file

Note: Overnight the rates will be pulled and a web message will be sent with the return file.

- a. Log into UI eServices
b. Click the "Messages" tab
i. The "Inbox" or "Unread" tab should show the Fiscal Rate Exchange message
c. Click the link "Fiscal Rate Exchange" to open the message

ACCOUNTS⁰ REQUESTS⁰ MESSAGES⁰ LETTERS⁰ BULK SERVICES

UNREAD¹ INBOX OUTBOX

INBOX

Send Message Mark All As Read Filter

Posted	Read	Subject	Account Id	Account Type	Quarter	Urgent	Attach	
Dec 11, 2014	<input type="checkbox"/>	Fiscal Rate Exchange				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark As Read Delete

- d. Click the "Fiscal Rate Exchange" attachment to download the file

WEB MESSAGE[Reply](#)

Received: Thursday, Dec 11, 2014 8:08:03 AM
Subject: Fiscal Rate Exchange

Your Fiscal Rate Exchange request has been processed.

Attached is a client list with employers that are currently listed as your client or a file that you have provided with updated client information.

Please see the attached rate exchange export file to view rates and messages pertaining to clients linked to your third party account.

ATTACHMENTS

Name	Description	Size (Kb)
Fiscal Rate Exchange_20141211.081202.txt	Fiscal Rate File	2

