User Guide

US Verify: Online New Hire Paperwork Process V5 (*Adecco Only*)

Document Use / Instructions

April 2012

This document is a User Guide covering the functional steps necessary to complete the step by step system application process functionality. This User Guide contains an **ACTIVE TABLE OF CONTENTS** that can be utilized by clicking the title section you wish to navigate to with this document. Additionally this User Guide contains internal hyperlinks from section to section to eliminate the need for scrolling and ensure the end user's navigation to the correct section.

This document is best utilized by saving to your desktop (not printing). However, navigate to its original location on a regular basis to check for updated versions, and ensure you are always following the most current version of this User Guide. **This is Version 5 (V5).**

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Overview

Important Note: Prior to using US Verify it is recommended you complete/review the E-Verify and US Verify training courses and/or materials.

US Verify is our web-based application that delivers ALL the new-hire On-boarding forms electronically for your employees to complete online. US Verify allows employees to complete the I-9 form with accuracy, and allows you to electronically process and store I-9 forms. US Verify completes the E-Verify query through their integration with the government E-Verify database. In addition to I-9 forms the US Verify system allows employees to complete the W4, applicable State Tax forms, and company forms such as screening waiver forms, Commitment Sheet, and more!

Also through US Verify you can deliver client required forms electronically. The library of the client required forms available through US Verify will grow over time eliminating the need for paper completely.

Benefits of using US Verify are:

- One location to deliver new hire forms electronically, manage E-Verify results, track I-9 document expirations, and lookup forms
- Reduced unemployment claims due to no more lost Mandatory Contact Notice/Commitment Sheets
- Monthly I-9 audit eliminated with full adoption of electronic forms!
- Forms completed perfectly every time- no more errors on I-9 or other forms
- E-Verify is integrated and occurs automatically after the I-9 is reviewed and completed
- Client Specific Forms can be delivered through the same system
- Remote form completion

Remote Process

US Verify has the functionality to deliver the On Boarding forms remotely to wherever the Employee is able to access a computer. Create the On boarding packet using the **Email** (preferred method) or **PrePopulate** functions in US Verify.

Note: After completing the forms remotely the Employee will still need to **go to a local branch for a Company Representative to review their ID documents and complete Section 2 of the I-9.** For forms other than the I-9 the employee doesn't need to be present in your office.

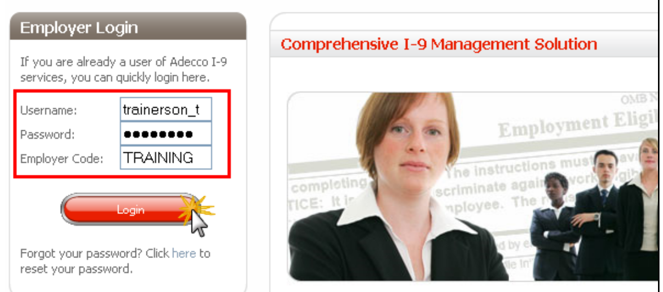
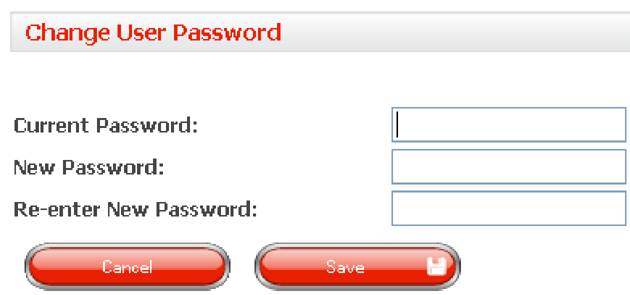
Another scenario that makes sense to deliver forms remotely is when your Employee wants to change their Federal or State W4, Direct Deposit form, or complete Client forms. In this case you will need to select the correct email template to deliver the additional form(s).

US Verify allows us to deliver Client required forms quickly and easily if the employee is already in US Verify. You should always start by checking the Contract Administration site to see if there are any additional forms not found in US Verify. Additionally, only Employee facing forms have been loaded into US Verify. Any form that the Employee does not need to see, Example: Checklist, background requirements will not be loaded into US Verify

Logging into USVerify

First Time Login

Follow these instructions for logging into US Verify. Step 3 is an additional step that will occur the first time you log into the system.

Step	Instruction	Action
1.	Locate US Verify website https://secure.usverify.com/hrmgr/hrmgr?brand=29000	
2.	Log in using Username = first part of your email address (joe. smith) or (jennifer.jones-ny) Password default = 1234 Employer Code Adecco: ADECCO Adecco Franchise: FRANCHISE Click the Login button	
3.	Logging in for the first time will prompt you to change your Password. After you change your password • Click the **Save** button • log out and then log back into the USVerify using your new password	

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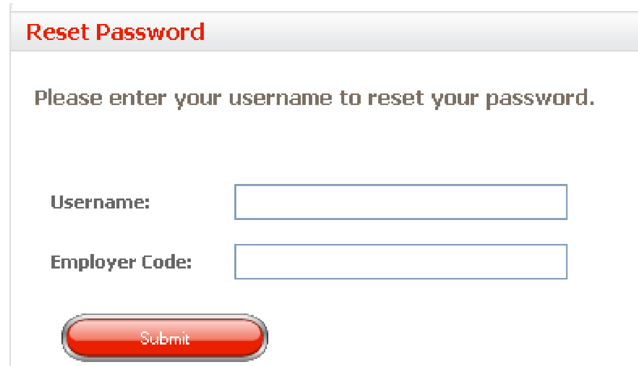
Forgot Your Password?

If you forget your password you can reset it from the main login screen.

Step	Instruction	Action
1.	From the Main login page, from the **Employer Login** section: Under the **Login** button in the" Forgot your password? Click **here** to reset your password." • Click the word **here**	
2.	• Enter your **Username** • Enter your **Employer Code** • Click the **Submit** button	
3.	An email will automatically be generated to your email account. (ETA: 2-5 minutes)	An email has been sent to the email address on record

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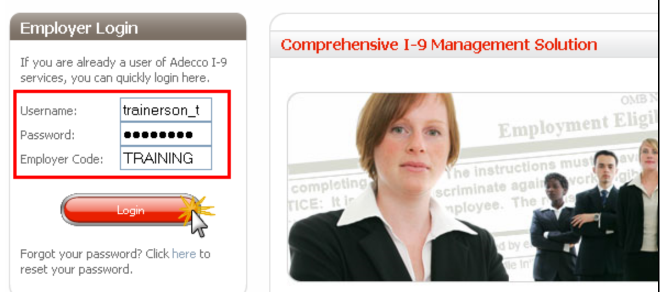
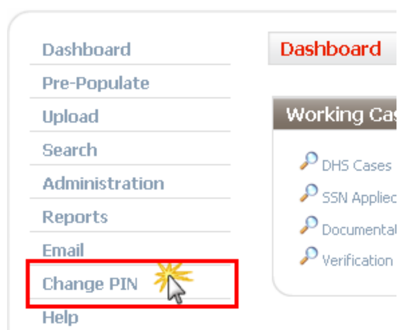
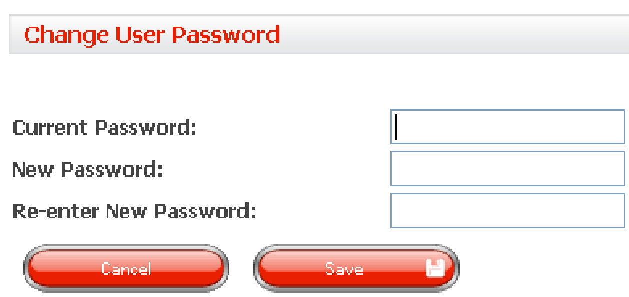
Changing Your Password

You can change your password for logging into US Verify any time you like on your own. You must first log into the system, then follow the instructions below. If at any time you feel your password has been compromised you can log in and create a new secret password. Remember never share your login credentials with coworkers, employees or anyone. Your password to the US Verify system is to be kept confidential.

Step	Instruction	Action
1.	Locate US Verify website https://secure.usverify.com/hrmgr/hrmgr?brand=29000	
2.	At any point in time if you feel your Password has been compromised you can change your password for the US Verify site Login using your **Current Password**	
3.	From the Left Navigation menu • Click the **Change PIN** hyperlink	
4.	The Change User Password screen will appear • Enter your **Current Password** • Create and Enter a new secret password into the **New Password** field • Re enter your newly created password into the **Re-enter New Password** field • Click the **Save** button	
5.	Log out and then log back into the US Verify using your new password	

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Setting up the Employee

There are two (2) different ways to set up an employee to complete his/her paperwork within US Verify; by **Email** and by **Pre-Populate**. Different reasons for using each method apply. Follow the instructions below that correspond with your daily scenario to set up your employees correctly.

Email (only) Process

This process is a quick way to set up a candidate with a new hire and I9 E-Verify packet. The only information about the employee that is required for this process is: Location of Employment, First Name, Last Name, and Email Address.

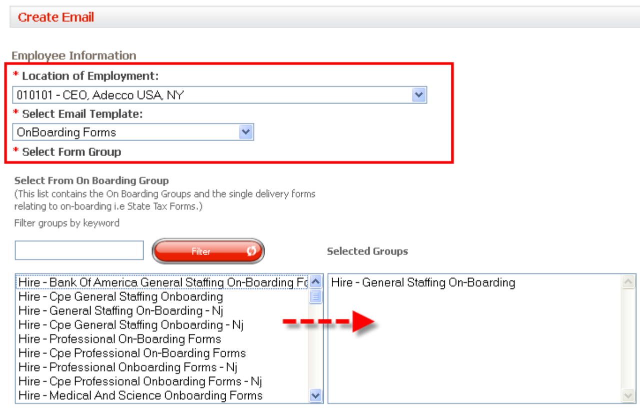
Step	Instruction	Action
1.	Locate US Verify website https://secure.usverify.com/hrmgr/hrmgr?brand=29000	
2.	After logging into US Verify: From the left **Menu** • Select **Email**	

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>3.</td><td>The Create Email page will open

Select Location of Employment from the dropdown menu
Select Email template from the Select Email Template dropdown menu
Double click to select form group from the Select Form Group list of options
Selected form group (s) will move to Selected Groups menu

OR

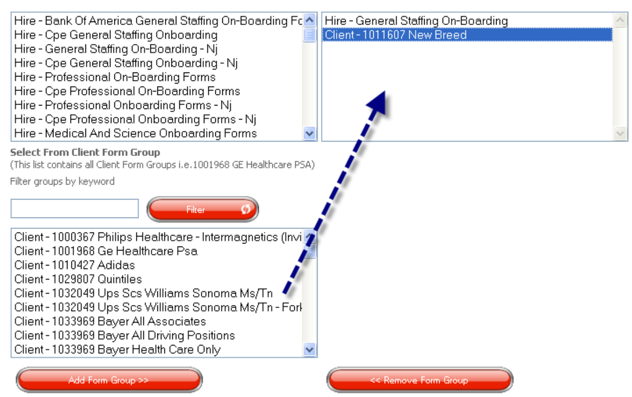
Click to highlight in the list of options then click the  button

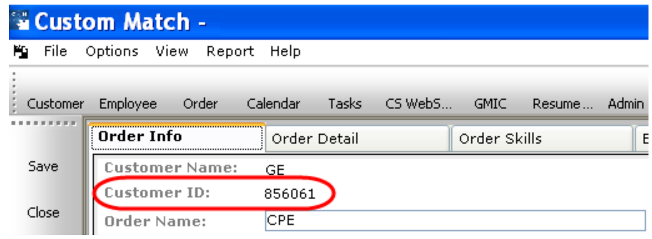
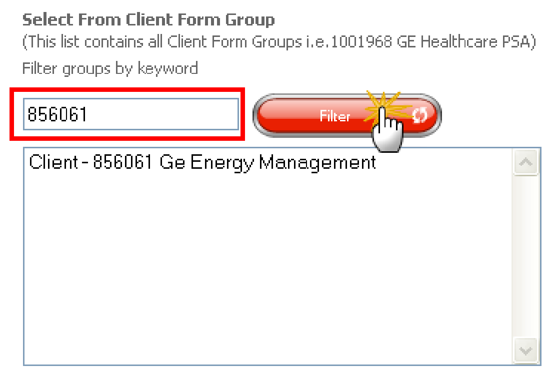
<u>Form Groups</u>:
Many form(s) and form packages are set up. If you have a question regarding what is in an actual form group and/or package, submit a request to eService.</td><td>
</td></tr>
<tr><td>4.</td><td>If Client Forms are being added:

Double click form choice from Select Client Form Group column

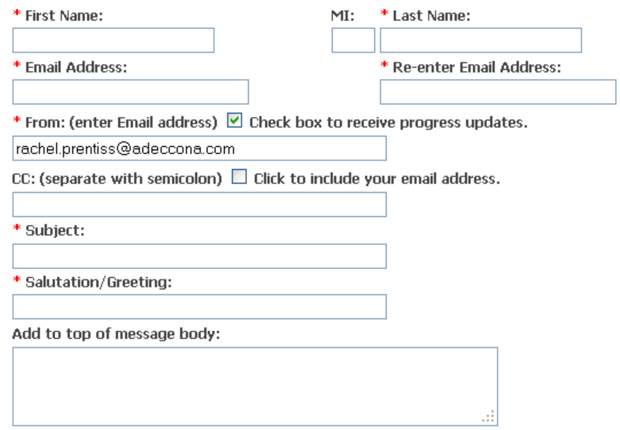
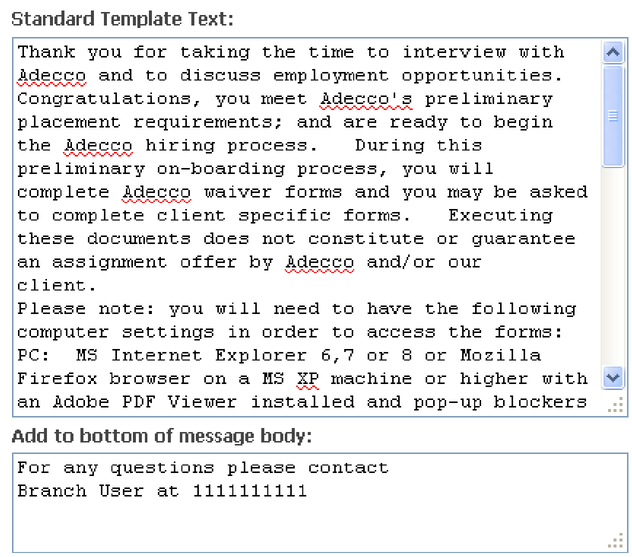
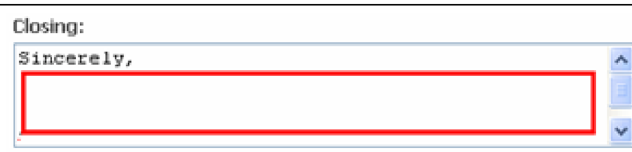
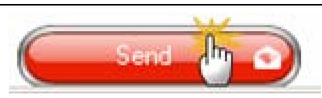
OR

Click to highlight then click the Add Form Group>> button

The form (form group) will be added to the Selected Groups
menu</td><td>
</td></tr>
</table>

Step	Instruction	Action
Client Form Group	***SEARCH TIP*** • In Custom Match (CM): Look at the Assignment and get the **Customer #** directly from the **Order** In US Verify • Type the **Customer #** in the field and then • Click the **Filter** button All of the package(s) and/or form(s) associated to that customer should appear. This will help sort through the list of form packages. *****NOTE:*** If no results appear in the listing then the Customer ID entered has no associated Client Forms in the US Verify system.	 

5.	• **Include I9?** field select
	  ▪ **Yes** to include I9 with On boarding forms
	or
	  ▪ **NO** if I9 has already been completed or is not needed at this specific time
	• **Use Notary?**
	
	If the Employee will be completing I-9 with approval/signature via Notary Republic select **YES** from the Use Notary dropdown menu
	
	If no Notary will be used leave the default as **NO**
	
	For more information regarding use of Notary see Notary section of this document.
		

Step	Instruction	Action
6.	Address the Email to the employee: • Complete all fields with a red asterisk • Add to top of message if desired The **Check Box to receive progress updates** is automatically checked. To received email updates related to the Employee's progress in US Verify: • **Leave checkbox selected** with green checkmark If you do NOT want to receive email updates regarding the Employee's progress in US Verify: • **Click checkbox to deselect** or remove the green checkmark	
7.	**Read/review** the **Standard Template Text**: ***NOTE:*** Do **NOT** change/edit/alter the **Standard Template Text** • Add desired, additional, relevant information to the employee in the **Add to bottom of message body** field	
8.	Your personal contact information will automatically populate in this section for you. * ***Note*** this can be edited if desired	
9.	• Click the **Send** button on bottom right of screen	
10.	• You will receive a confirmation message • An email will automatically be generated to your Employee's email	

See The Employee Experience section of this User Guide for In Branch (and Remote) Employee completion steps.

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Pre- Populate Process

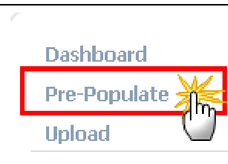
The Pre-Populate process can be used for when an Employee does not have an email address, or simply wants to complete the forms while s/he is currently in your office. A packet can be set up for the Employee to complete while s/he is in your office.

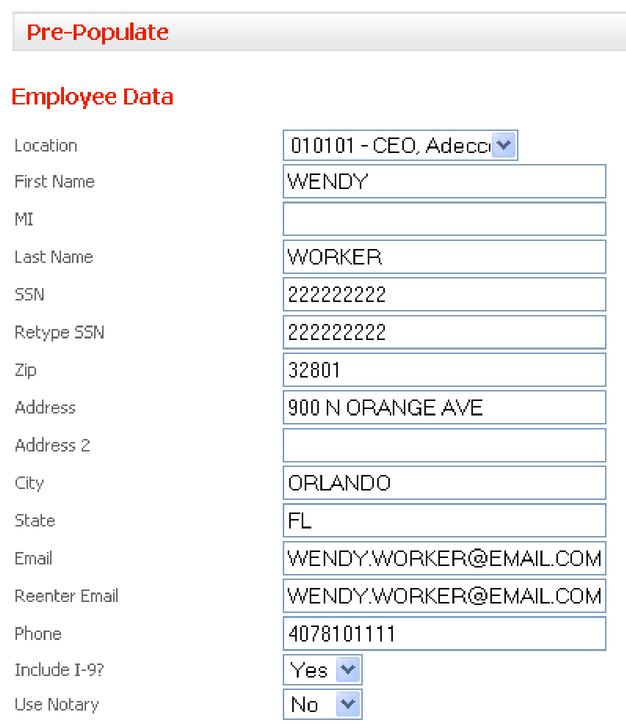
In Office Process

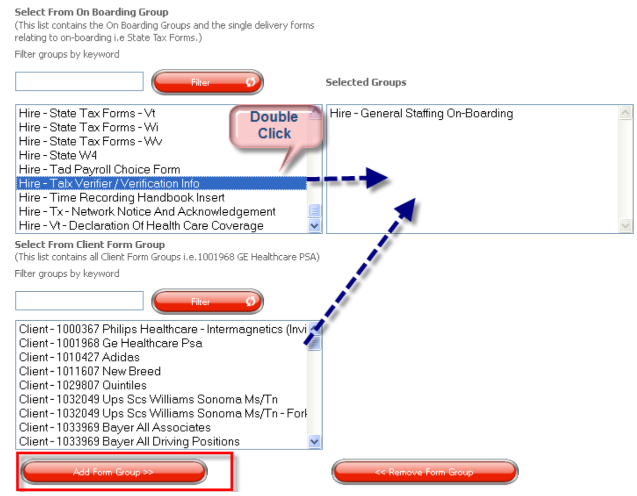
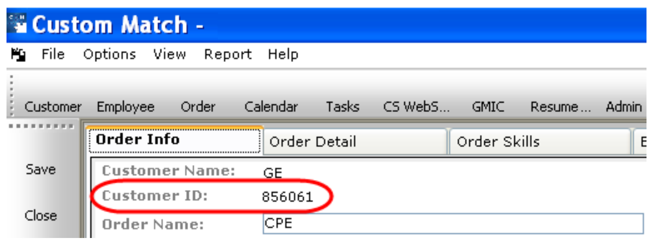
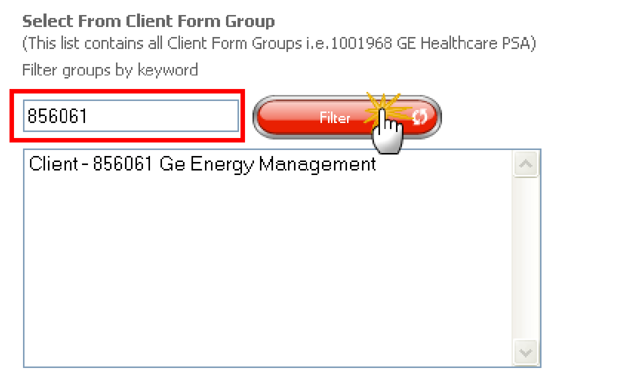
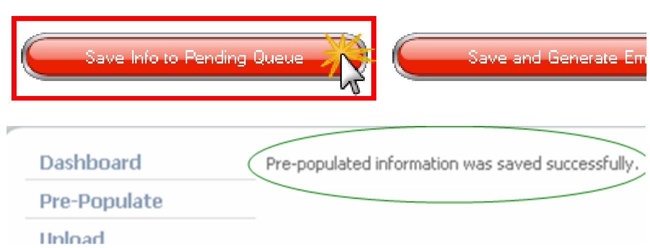
This Pre-Populate process is the ONLY way to set up paperwork for in-office applicants/employees and employees that do not have an email address.

In the Pre-Populate process you are entering in the Employee information so that s/he will not have to complete their personal information fields during their on-boarding process. **Always confirm <u>Name, Address, email and phone</u> with the employee to ensure the most current information exists in the CM record.**

Note: The employee may change the information if needed during the completion of his or her on-boarding forms.

Step	Instruction	Action
1.	Locate and log into the US Verify website https://secure.usverify.com/hrmgr/hrmgr?brand=29000	
2.	From the left **Menu** • Select **Pre-Populate**	

3.	The **PrePopulate** page will open.
	
	In the **Employee Data** section:
	• Select branch location from **Location** drop down menu options
	
	Populate <u>all</u> fields with information <u>from the Employee's file of CM</u>
	
	• **Form Group** field select **correct group for YOUR new hire**
	
	• **Include I9?** field select
	  ▪ **Yes** to include I9 (after addendum is signed and returned) or
	  ▪ **NO** if I9 has already been completed or is not needed at this specific time
	• **Use Notary?**
	If the Employee will be completing I-9 with approval/signature via Notary Republic select **YES** from the Use Notary dropdown menu
	
	If no Notary will be used leave the default as **NO**
	
	For more information regarding use of Notary see <u>Notary</u> section of this document.
		

Step	Instruction	Action
4.	Make form/form group selections from the **Select Form On Boarding Group** section and (if needed) **Select Client Form Group** section: **Double click form group** to move to **Selected Groups** menu ***OR*** **Click form group to highlight** then click **Add Form Group>>** button	
Client Form Group ***SEARCH TIP***	• In Custom Match (CM): Look at the Assignment and get the **Customer #** directly from the **Order** In US Verify • Type the **Customer #** in the field and then • Click the **Filter** button All of the package(s) and/or form(s) associated to that customer should appear. This will help sort through the list of form packages. *****NOTE:*** If no results appear in the listing then the Customer ID entered has no associated Client Forms in the US Verify system.	 --- 
5.	After completing ALL fields, from the bottom of the page: • Click the **Save Info to Pending Queue** button • You will receive a **confirmation message** that the employee's record has been saved successfully in US Verify Now the Employee will need to login to their link and complete their form(s). Follow the steps in [The Employee Experience](#) section to assist.	
See [The Employee Experience](#) section of this User Guide for In Branch and Remote Employee completion steps.		

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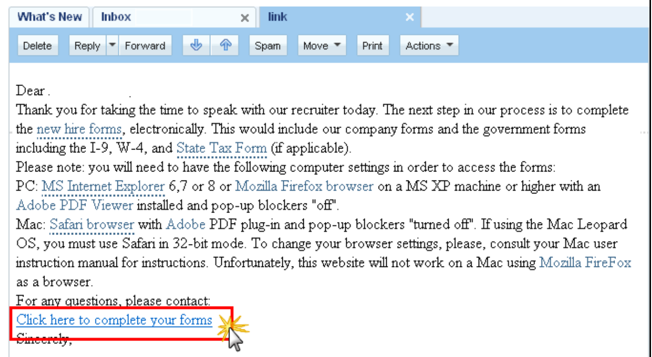
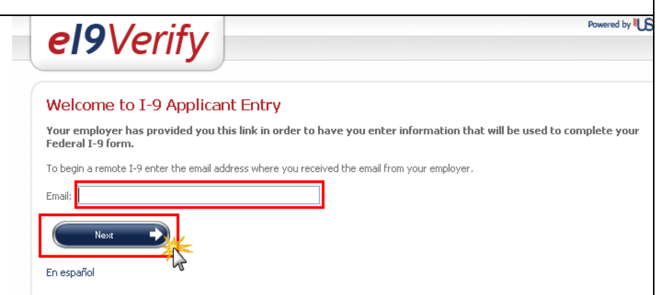
The Employee Experience

There are TWO (2) different methods for the Employee to complete forms within US Verify by completing on a pc **in your branch/office location** or by completing online **from a remote location** (usually at home). The process for completing the form or form packets is the same regardless of the location from where he/she access the forms. The difference is the point of access or login to retrieve the form(s) you set up for the Employee.

Employee Complete Forms from Remote Location

In order for your Employee to complete the forms from a remote location s/he will need to remember, and have access to **the email you entered for him/her when setting up the packet in US Verify**.

EMPLOYEE/CANDIDATE STEPS: Remote completion		
Step	**Instruction**	**Action**
1.	**From a remote location**  Employee will • access the **email account** to which you sent the form packet via US Verify • **read the email and review the browser setting information** • click the **Click here to complete your forms** link **Note:** The **Employer Code** is the same Employer Code that you use to login to US Verify. • The Employee will need to be made aware of the **Employer Code** prior to logging in	
2.	**If you set up the employee forms using email only (not pre-populate)** The eI9Verify page will open first if the employee. The employee must • Enter his/her **email address** Then • Click the **Next** button	
The Employee will be brought to their I9 and/or the forms that you have assigned. **Note**: the **eI9 page** shows up regardless of whether the employee is completing an I9 at this time or not. **After the Employee completes the forms then he/she must contact you for their next steps.** The forms that the employee fills out will determine their next steps. • *Example*: **On-Boarding forms** will **require the Employee to come to your office to have their I-9 verified.**		

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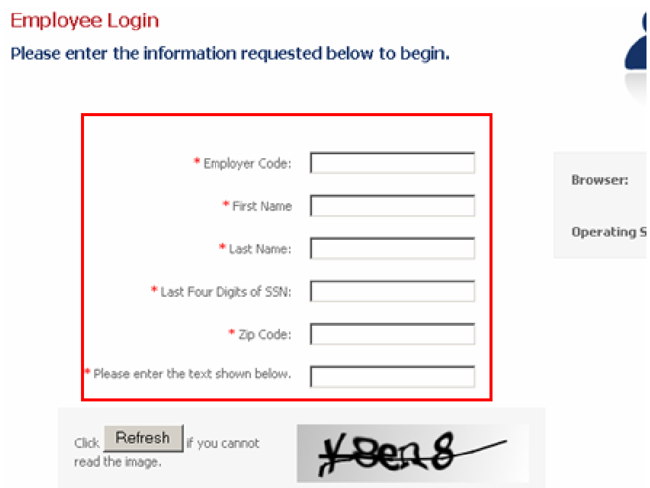
Employee Complete Forms in Branch/Office

In order for your Employee to complete the forms, you will need to set up the Employee on a web enabled computer in your office.

***Note:* The computer that the Employee is completing the forms at must be connected to an office printer.**

In addition to web access and printer access: The Employee Access URL (link) must be **saved** in either the ***bookmarks*** or ***favorites*** of a web browser in your candidate PC Stations in your branch/office location.
https://secure.usverify.com/hrmgr/eob?p_action=workFlow&switchCode=501

EMPLOYEE/CANDIDATE STEPS		
Step	**Instruction**	**Action**
1.	**After you access the above link for the employee from the candidate/ test pc workstation**  Employee will • Go to test computer • login to the **Employee Login Page** • all fields are required (as noted by red asterisk) **Note:** The **Employee Code** is the same Employer Code that you use to login to USVerify. • The Employee will need to be made aware of the **Employer Code** prior to logging in	
2.	After completing the form fields, from the lower right corner of the screen, the employee will need to: • Click the **Next** button	
The Employee will be brought to their I9 and/or the forms that you have assigned.		

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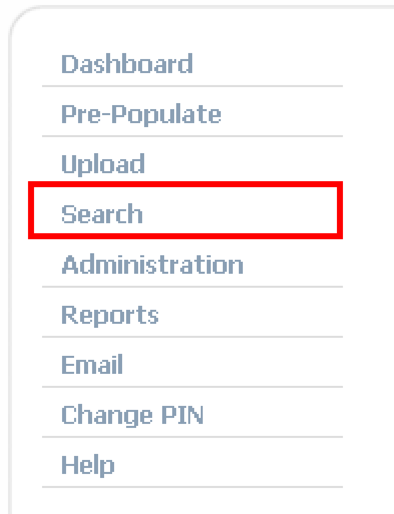
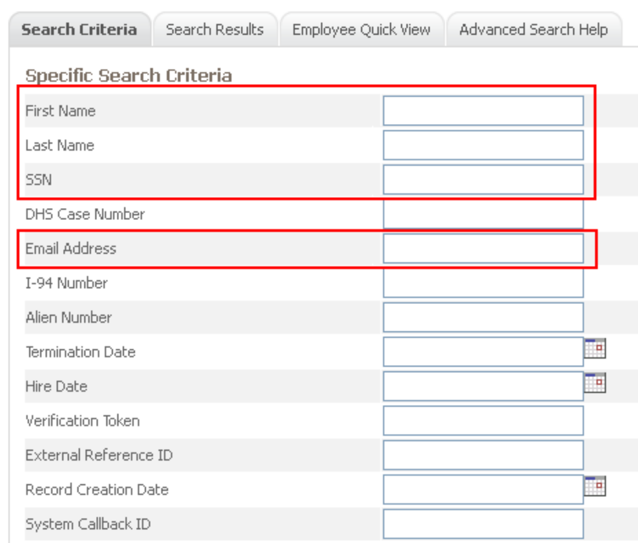
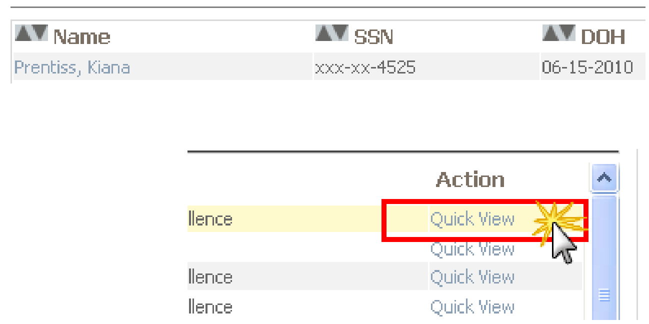
Conducting Searches

There are two (2) different methods to search for Employee records within US Verify. You can search your office locally as well you can conduct a search on all offices.

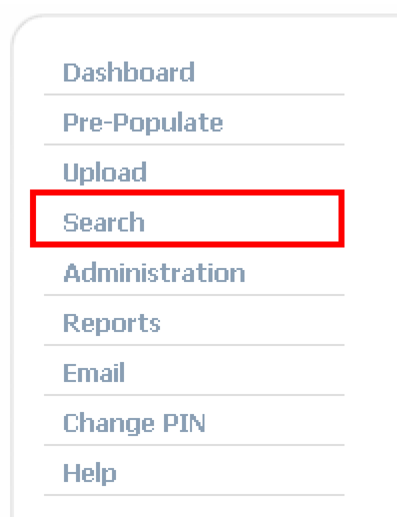
Searching office location that you have access to:

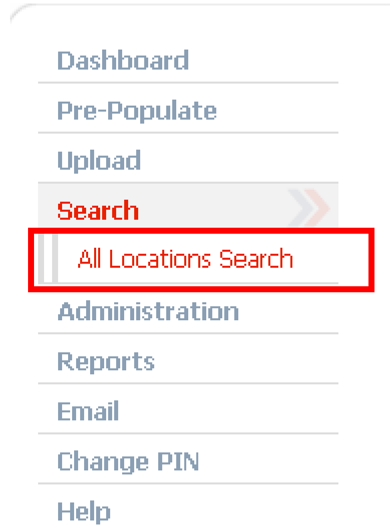
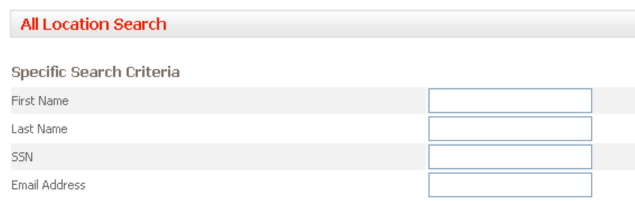
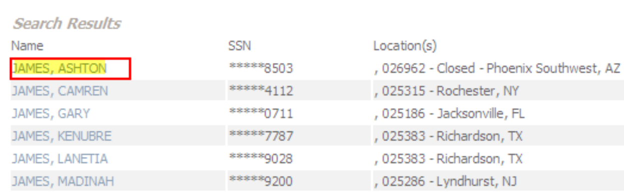
To conduct a search for an Employee record within the offices that you have access to in US Verify follow the steps below:

Step	Instruction	Action
1.	From the left **Menu** Select **Search**	
2.	Enter the • **First** and/or **Last Name** and/or • **SSN** of the Employee you are reactivating and/or • Employee's **Email Address**	
3.	• Then scroll to the bottom of the page and click the **Search** button	

Step	Instruction	Action
4.	The Employee Name's name will appear. From the far right **Action** column Click the **Quick View** hyperlink to open the **Employee Record**.	
5.	The **Employee Quick View tab** will open From the **Employee Functions** section: • Click the **Go to Employee Record** button	

Searching ALL office locations that you do not have access to:

Step	Instruction	Action
1.	From the left **Menu** Select **Search**	

Step	Instruction	Action
2.	The **All Locations Search** sub-option link will appear: • Click the **All Locations Search** link	
2.	The All Locations search screen will appear Enter either the • **First** and/or **Last Name** and/or • **SSN** of the Employee you are reactivating and/or • Employee's **Email Address**	
3.	• Click the **Search** button	
4.	The **Search Results** will appear. Under the Name section • Click the **name of the Employee** that you are searching	
5.	**Note:** You will have the function to be able to: • Assign form(s) • Verify the I-9 form • Resolve the E-Verify case • View the record	

Countersigning On-boarding Forms and Completing Section 2 of the I9

The employee informs you that s/he has completed the On-Boarding Forms. You will now be able to Countersign the required forms.

- The Reference Check Release Form will be ready for you to complete the Employee reference check
- When complete continue to Section 2 of the I9 form to data enter the Employee's IDs
- E-Verify will now be processed
- The final step is to print any forms that the Employee should receive.

Photo Matching – Section 2 of the I9

The **Photo Matching** status requires you to compare the photograph on the employee's Section 2 document to the picture displayed by E-Verify. To date, the only documents included in the **Photo Matching** tool for E-Verify are the US Passport, I-766 and I-551.

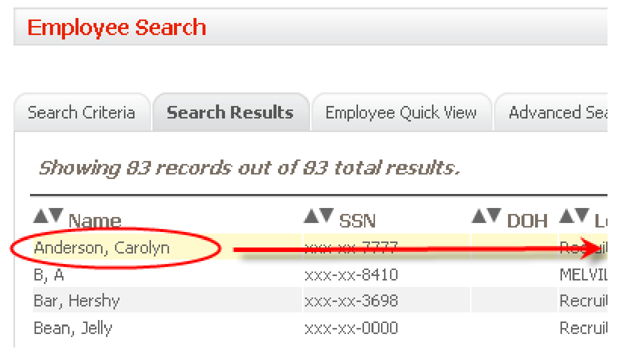
Form I-9: Section 2

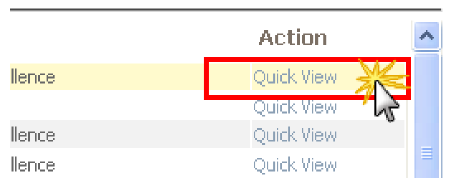
You must retain copies of the **Photo Matching** documents which are the US Passport, I-766, and I-551.

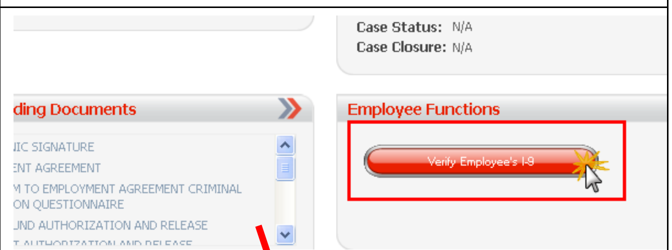
Scenario: You are completing Section 2 of the Form I-9 and your employee presents either the US Passport, I-766 or I-551.

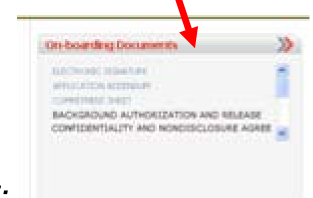
Step	Instruction	Action
1.	After the forms are completed by the Employee; to locate the **Employee Record**: Navigate to the **Dashboard** (From the left menu click the **Dashboard** hyperlink) From the **Working Cases** section • Click the **Verification Pending** hyperlink ***NOTE:*** **<u>Verification Pending</u>** means: On-Boarding paperwork has been completed by Employee and section 2 of the I-9 is ready to be completed	

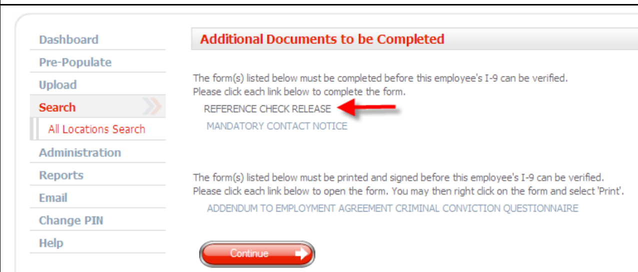
<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>2.</td><td>The Search Results list will open:
• Locate Employee name in Verification Pending list

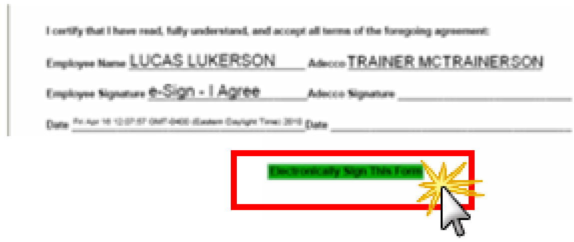
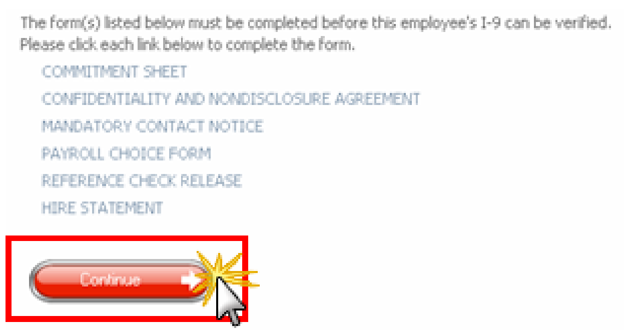
From the far right Action column
• Click the Quick View hyperlink to open the Employee Record</td><td>


</td></tr>
<tr><td>3.</td><td>The Employee Quick View Tab will open.
From the bottom right Employee Functions section
• Click the Verify Employee's I-9 button

NOTE:
*The form names will be in Blue if they have been countersigned. The form names will be in Black if they have not been completed fully and/or they are Read Only/Downloaded documents.</td><td>

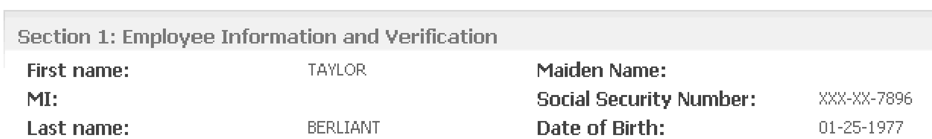

NOTE:</td></tr>
<tr><td>4.</td><td>Countersign the required forms. To counter sign each form:
• Click the form name hyperlink of each form separately
• After you countersign and/or view a form it will no longer be linked
  ▪ The font will change to “black”
  ▪ This will prevent you from countersigning the form more then once

NOTE: You will be able to view the form again from inside the Employee’s record.</td><td>
</td></tr>
</table>

Step	Instruction	Action
5.	The form will open • **Review** the form • Read **Certification Statement** • Click the green **Electronically Sign This Form** button	
6.	After you click the **Electronically Sign This Form** button you will be brought back to the forms list to select the next form. After countersigning ALL forms: • Click the **Continue** button You will be brought to Section 2 of the I9 and E-Verify query	

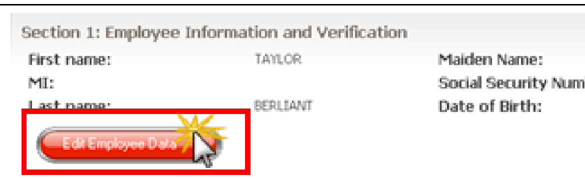
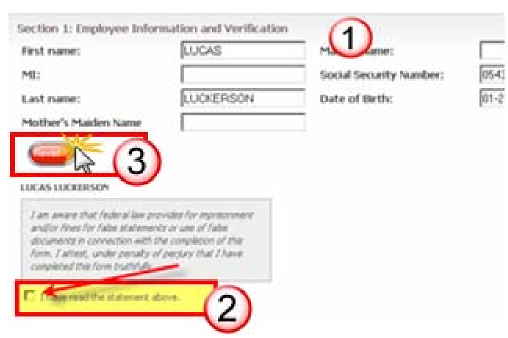
Section 2 of the I9

FIRST Section 1 of the I9 form will appear. This gives your employee one more chance to ensure their information is correct.



- Ask the employee to confirm they are satisfied with what they have entered

Note: The employee will need to complete the attestation at your computer. If you are uncomfortable with an Employee sitting at your desk using your keyboard, you may want to do the entire forms review at the testing computer in the event the employee needs to change their section 1 information.

7.	**If the Employee wants to make a change:** • Click **Edit Employee Data** --- The **Employee** will need to 1. Update the fields that need correction. 2. Click the **I have read the statement above** checkbox 3. Click **Revert button** to continue to Section 2	 --- 

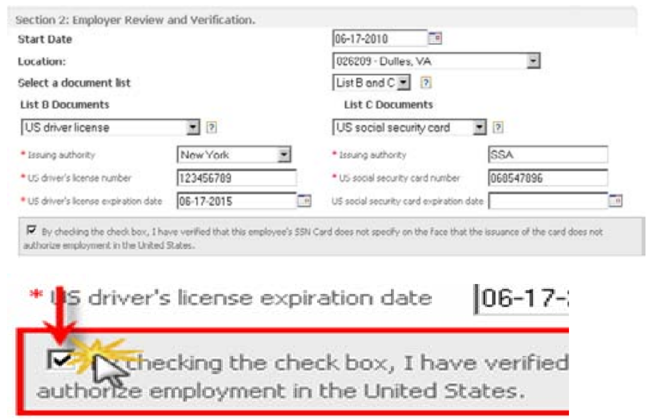
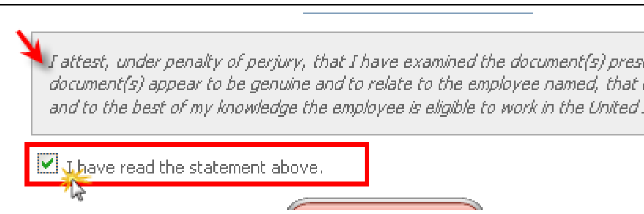
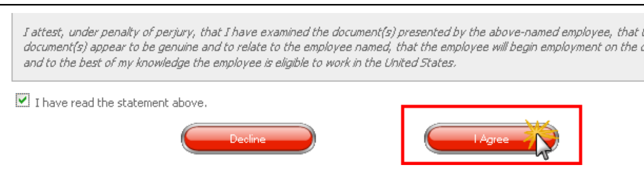
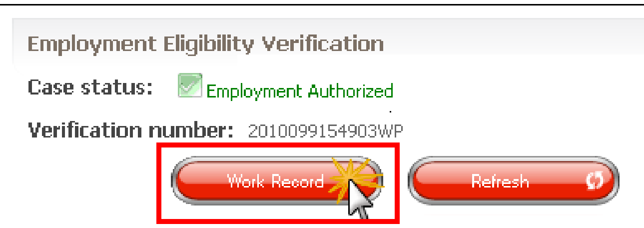
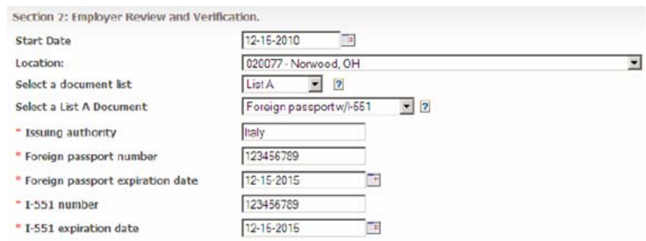
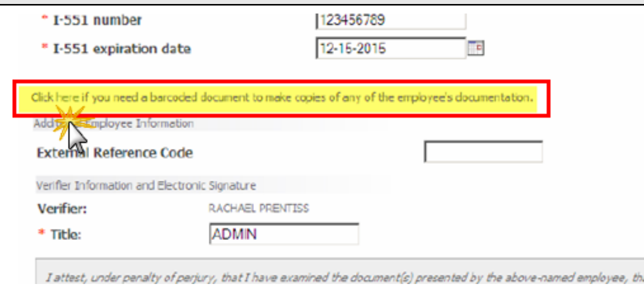
Section 2: Employer Review and Verification The documents that are provided by the Employee will determine if you enter information for List A only or List B and C.		
8.	• Enter the information in the **drop down boxes** for: ▪ **Start Date** ▪ **Location** ▪ **Select a document list** If the employee presents a US Passport, **I-766 or I-551** see the Photo Matching Steps below ***Note:*** If an SSA Card is entered it will prompt you to check a box (seen in the screenshot).	
9.	After entering the Employee Document information into the form fields: • **Read** the gray attestation section • Click the **I have read the statement above checkbox**	
10.	To apply your electronic signature to Section 2 of the I9: • Click the **I Agree** button	
11.	You will then be brought back to the **Employee Record** • Click the **Work Record** button to complete the E-Verify portion Working the Employee Record is covered in the **Managing E-Verify Cases** section. Click **HERE** to "jump" within this document to that section	

Photo Matching Steps for US Passport, I-766 or I-551

When the employee presents a US Passport, I-766 or I-551 document for their Form I-9. The initial response of **Photo Matching** is returned.

Step	Instruction	Action
1.	• **Enter the information** into the corresponding fields in **Section 2**	
Step	**Instruction**	**Action**
2.	• Click the **here** hyperlink in the: **Click here for your bar-coded document to fax copies of the employee's EAD documentation** message • Finish completing Section 2 of the Form I-9	
3.	• **Photocopy** the **US Passport**, **I-766 or I-551** and • **Fax** the **bar-coded document and copy of the ID** to the fax # provided on the bar-coded document. *The ID will upload into the Employee Record in USVerify	 
4.	• **Shred** the **photocopy of the ID once you confirm that the ID is uploaded into the Employee Record.**	

5\. To complete the process in US Verify, from the **Employment Eligibility Verification** section the **Case Status** reflects **Photo Matching is Required**

- Click the **Photo Matching** button

6\. The **DHS Photo Matching page** will appear:

- The photograph that should be on the employee's document is displayed

Instructions are displayed for you explaining what you must do to indicate that the photographs do or do not match.

Step 7A:

- Click **Yes** if the photographs are the same to confirm that the photo on the employee's document matches the photo returned by E-Verify

- E-Verify will then update the case status to **Employment Authorized** and you can
  - o Resolve the case as **Employment Authorized.**

Step 7B:

- Click **No** if the photographs are different to indicate that the photo on the employee's document does not match the photo returned by E-Verify
- E-Verify will then update the case status to **DHS Tentative Nonconfirmation**
- You will then follow the steps with your employee when a case is turned back as **DHS Tentative Nonconfirmation**

A message is displayed informing you that a copy of the employee's document should be retained.

Next:

- Click the appropriate **Contest**/**Not Contest** option
- Follow the steps to process the **Contest** and refer the employee or **Not Contest** process

Jump to the DHS Tentative Nonconfirmation section of the Case Status Results section for steps on processing Contest and Not Contest.

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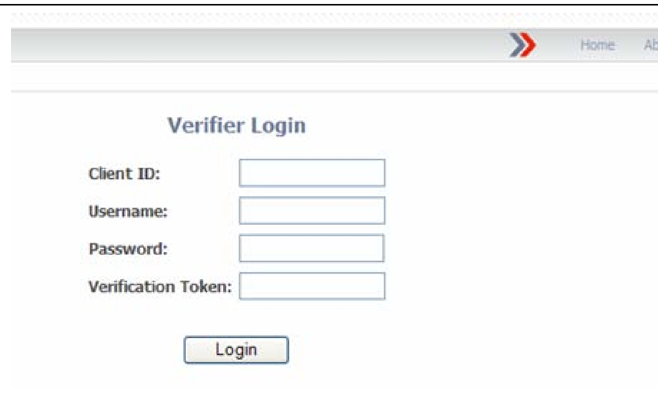
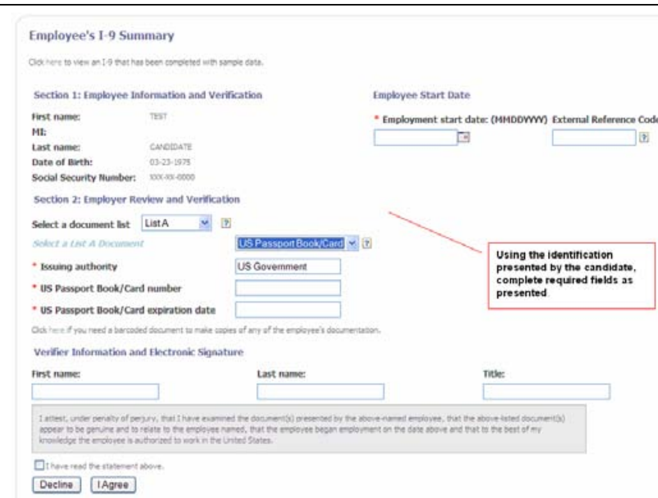
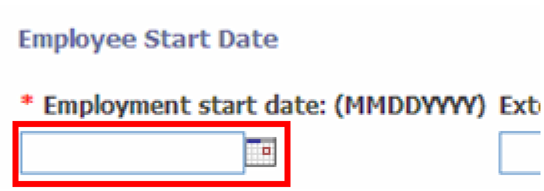
Remote Verifier Process

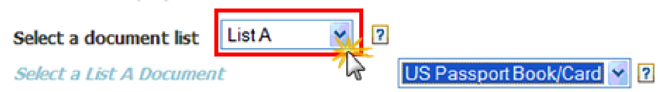
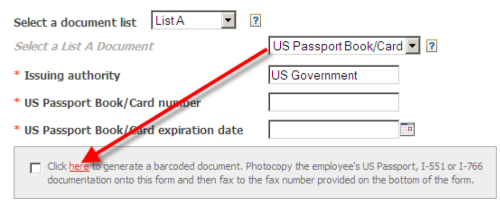
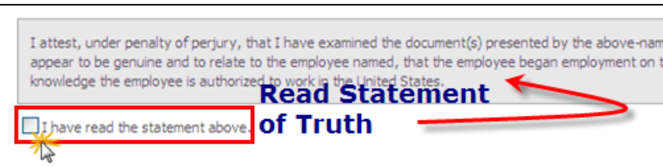
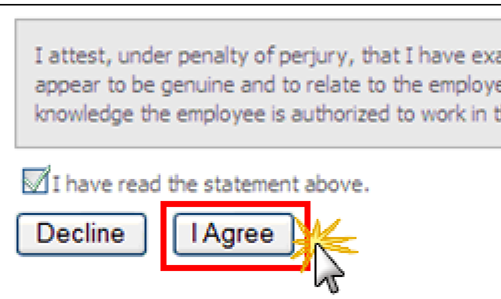
If an Employee is hired from a remote location, or to work in a remote location he/she may need to complete section 2 of the I9 in your branch/location - in which case a remote verifier would be needed. Branch Colleagues will be able to verify the employee identification and complete the I-9 on behalf of the requesting office. To verify employee identification remotely, the Branch colleague will need to do the following:

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>1.</td><td>Go to the remote verifier web page:
• enter URL/web address</td><td>https://secure.usverify.com/hrmgr/eob?brand=29000</td></tr>
<tr><td>2.</td><td>The Verifier Login page opens

• Complete the fields

Verification token is the number from last page of on boarding document provided by the Employee. The Employee is instructed to print this final page (which includes the token number) upon completion of his/her online forms/pkt.

• Click the Login button</td><td>
</td></tr>
<tr><td>3.</td><td>After logged in the remote verifier will be brought immediately to Section 2 of the Employee's I9
The Colleague will use the identification provided to them by the Employee to complete the I-9 screen.</td><td>
</td></tr>
<tr><td>4</td><td>The following will need to be completed by the Colleague:
Employment Start date:
• Current date that the Employee is in the branch completing the I-9 form</td><td>
</td></tr>
</table>

Step	Instruction	Action
5.	**Select document list**: Select the I-9 document list that the associate is presenting for identification • **List A** **OR** • **List B and C** **Please note:** If a Social Security card is used as a List C document, the Colleague must acknowledge that the social security card does not specify on the face that the issuance of the card does not authorize employment in the United States by clicking the check box next to the statement. If the US Passport, I-766 and I-551 are being used you will be required to **print** the bar-coded fax cover page and fax the copy into the US Verify fax server. **Do not shred** the copy until you confirm with the owning office that the fax received in the Employee's record.	 
6.	**Verifier Information and Electronic Signature**: The Colleague's information will be prepopulated in the fields: • **first name** • **last name** • **title**	
7.	After **reading** the **statement of truth** then: • Click the **I have read the statement above** check box	
8.	• Click the **I Agree** button	
9.	The Colleague user will automatically be logged out of the system	

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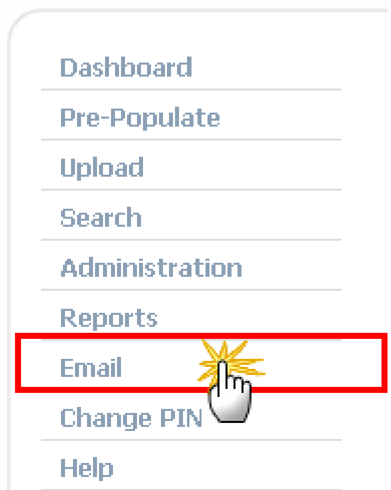
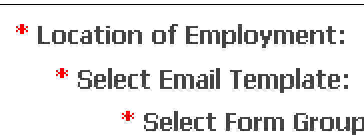
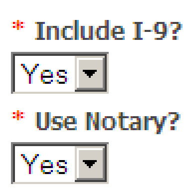
Notary Process

US Verify allows an Employee the opportunity to complete the I-9 and OnBoarding forms electronically. There are instances where the Employee may not live close to one of our offices and would need to visit a Notary Public to have his/her I-9 form verified. US Verify has the ability to deliver the I-9 form to the Employee and still have the form stored within the US Verify system after the Notary Public has verified the documentation. E-Verify can be then be processed directly through the Employee's record in the US Verify.

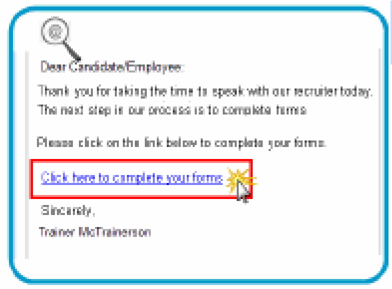
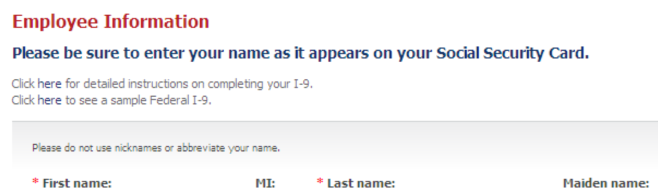
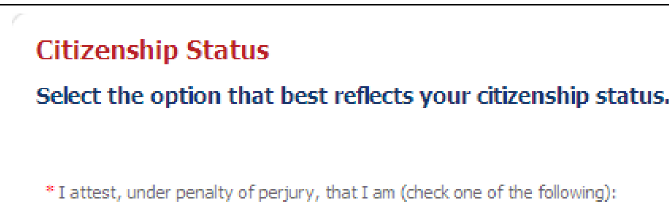
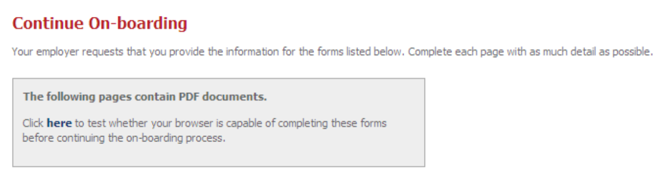
Benefits of using US Verify are:

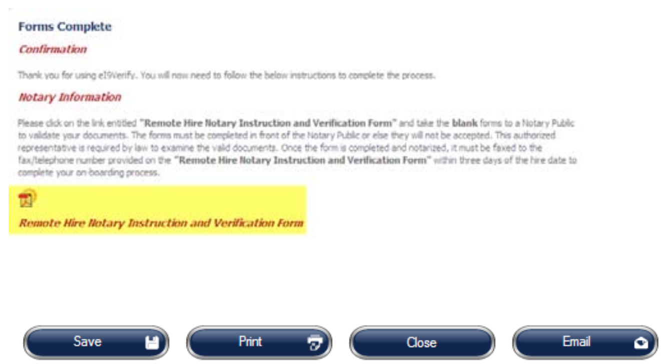
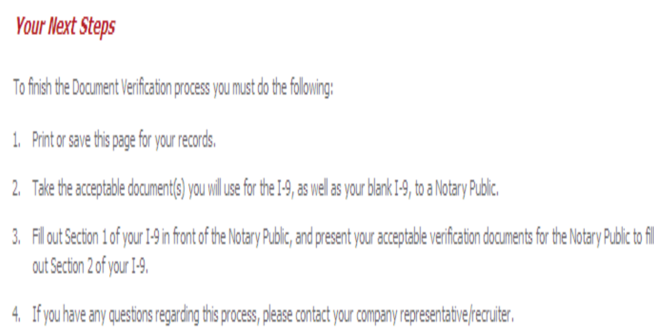
- Electronic delivery of the I-9 form.
- E-Verify completed through US Verify
- Remote Form Completion

Colleague Process: Emailing I-9 form and OnBoarding Packet with Notary

Step	Instruction	Action
1.	From the left menu options: • Select **Email**	
2.	Complete **Form set up fields** selecting information as required for your specific Employee	
3.	After logging into US Verify - from the **Email** screen: • Select **Yes** to **Include I-9** • Select **Yes** to **Use Notary** Complete the rest of the email template as instructed in the **Email Process section of the US Verify User guide**.	

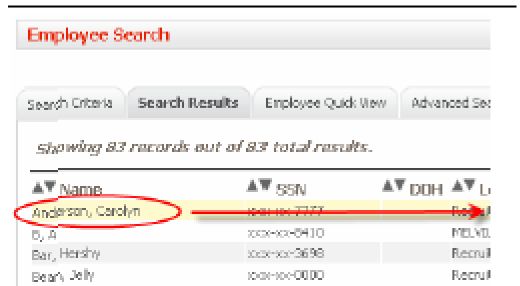
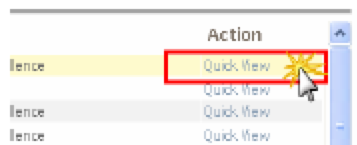
Employee Process: Completing the I-9 form and OnBoarding Packet with Notary

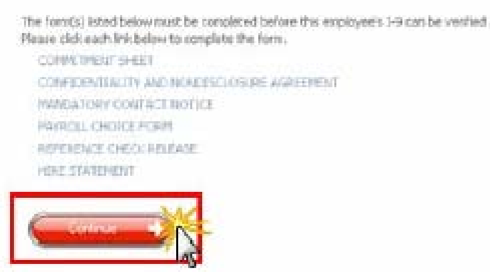
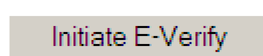
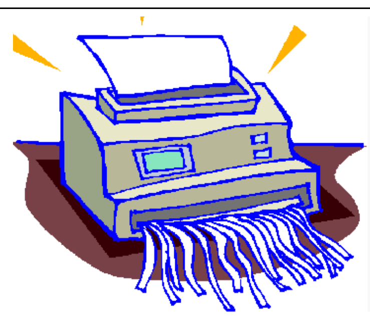
Step	Instruction	Action
1.	Employee will log into personal email and: • Click the **Link** found in the email.	
2.	Employee will complete: • **Information Page** and • Enter his/her **Name** as it appears on the Social Security Card.	
3.	Employee will complete: • **Citizenship Status**	
4.	Employee will complete: • **OnBoarding Forms** as assigned	

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>5.</td><td>Employee will finish the forms and be brought to the Forms Complete page. Employee will:
Click on the PDF document.
Print the following forms:
Blank I-9 form
Notary Instructions
Notary Signature Form
Bar Coded Fax Cover Page
Employee Instructions
NOTE: 12 Pages will be printed
Click Save, Print, Close, and/or Email at the bottom of the Form Complete page</td><td>
</td></tr>
<tr><td>6.</td><td>Employee will contact the Notary Public and:
Take the acceptable document(s) s/he will use for the I-9, as well as the blank I-9 Form, and Notary Form to a Notary Public.
Fill out Section 1 of the I-9 in front of the Notary Public, and present his/her acceptable verification documents for the Notary Public to fill out Section 2 of the I-9 Form.
Once the I-9 and Notary Forms are complete then s/he will fax the completed I-9 Form and Notary Form to the Employee's US Verify record using the provided bar coded fax cover page.
Note: use the fax number provided on the cover page.
Note: Employee will need to photocopy the Permanent Resident Card (Form I-551), Employment Authorization Card (Form I-776) or US Passport or US Passport Card onto the fax coversheet if that is the documentation that is being used.</td><td>
</td></tr>
</table>

Colleague Process: Processing E-Verify in US Verify for Employees using Notary Process

Step	Instruction	Action

1.	After the OnBoarding Forms are completed and the I-9 and Notary Forms are uploaded:
	
	• Log into the **Employee's record**
	  o Click Search from left menu
	  o Enter desired search criteria into fields (i.e employee Name or SSN)
	  o Click the Search button at bottom  of screen
	  o From **Search Results** list (pictured to the right)→
	  o Click the **Quick View** link in the far right column of the employee's row
		

2.	**Countersign** the required forms The **I-9 form** and **Notary** form(s) will be found on this list. **Print the I-9** form for reference during the E-Verify process. • If the Permanent Resident Card (Form I-551), Employment Authorization Card I-776, or US Passport is used then the fax coversheet will need to be printed to use the photo tool in E-Verify. Click the **Continue** button	
3.	The E-Verify screen will appear. • Enter accurate information into the corresponding fields • Click the **Initiate E-Verify** button	
4.	***IMPORTANT!*** IF you used fax documents/papers/forms during the E-Verify process: • **Shred** the photocopy of the **I-9 form** and **fax cover page** .	

Key Points for Notary Process

- **The Employee must complete Section 1 of the I-9 form in front of the Notary.**
- **Verify that the Notary completed the I-9 form correctly.**
- **The fax cover page may have a copy of the Permanent Resident Card (I-551), Employment Authorization Card I-776, or US Passport or US Passport Card if any of those documentations are used.**
- **Colleague Instructions can be found on the Dashboard page of US Verify.**

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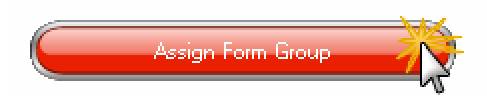
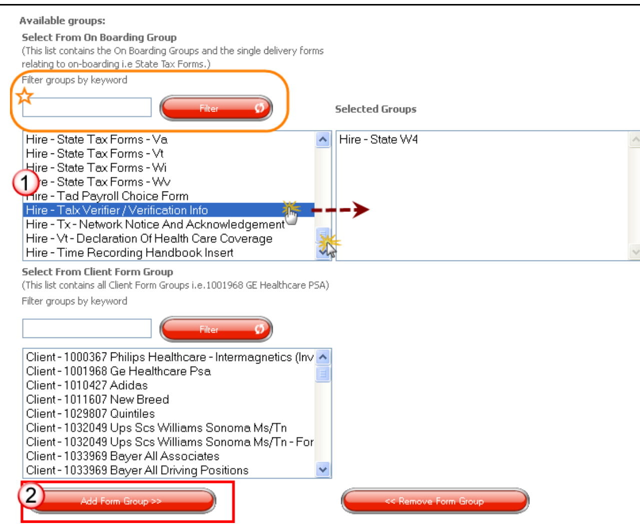
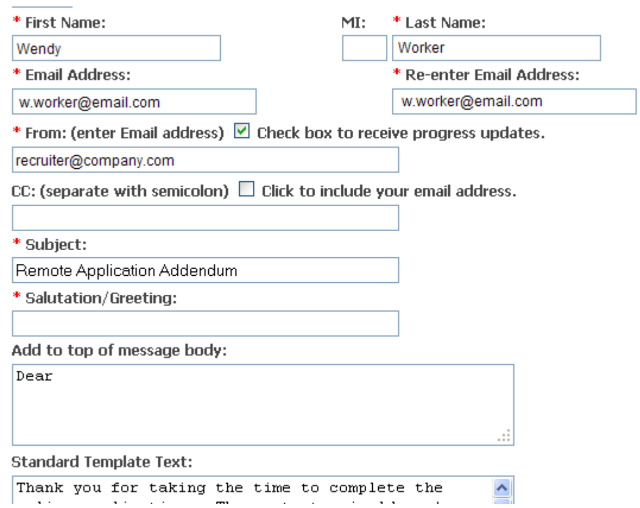
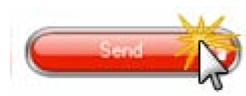
Reactivate an Employee in US Verify

When an employee wishes to REACTIVATE you will need to determine whether they are a "Reactivate" Employee or a "Rehire" Employee. **Please follow the Rehire Reactivate policy to make that determination**. You can use US Verify to deliver the forms to them that they need to complete for their reactivation.

Step	Instruction	Action
1.	To **Reactivate** an Employee in US Verify: Conduct a search for the Employee record. For more detailed steps on how to conduct a Search see the Conducting Searches section of this document.	
2.	To assign the **Rehire/Reactivate** form • Click the **Assign Form Group** button	
3.	The **Available Groups** page opens. To add forms or form groups: To filter: • Enter the keyword for your form/form group into the filter field and click the **Filter** button OR • Scroll through the available forms listing • Select necessary **form or form group** • **Double click form/form group** to add to **Selected Groups** column ***OR*** ▪ From bottom of page click **Add Form Group>>** button to add to **Selected Groups** column	
4.	• Indicate if I-9 needs to be included by selecting from **Include I-9 drop down menu**	

Step	Instruction	Action
5.	• Click the **Assign & Email** to send to employee ***OR*** • Click **Assign & Save** for in branch/office completion	
6.	The **Create Email** page will appear. The template will be populated with the information entered when the employee originally created his/her file. • **Review the information** ▪ Ensure fields with **red asterisks** are populated and information is accurate The **Check Box to receive progress updates** is automatically checked. To received email updates related to the Employee's progress in US Verify: • **Leave checkbox selected** with green checkmark If you do NOT want to receive email updates regarding the Employee's progress in US Verify: **Click checkbox to deselect** or remove the green checkmark **If use of a Notary is required at this point please review the Notary section of this document for more detailed information.	
7.	When all required fields are complete • Click the **Send** button **An email will automatically generate to the Employee via US Verify	
8.	The Employee will log into his/her email and follow the same process to complete the Rehire/Reactivate form similar to the On-Boarding process.	

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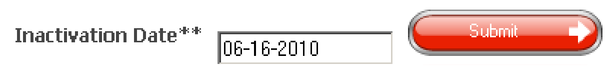
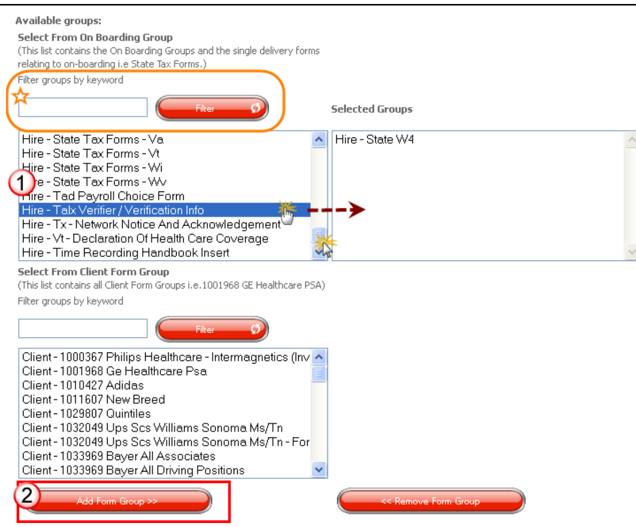
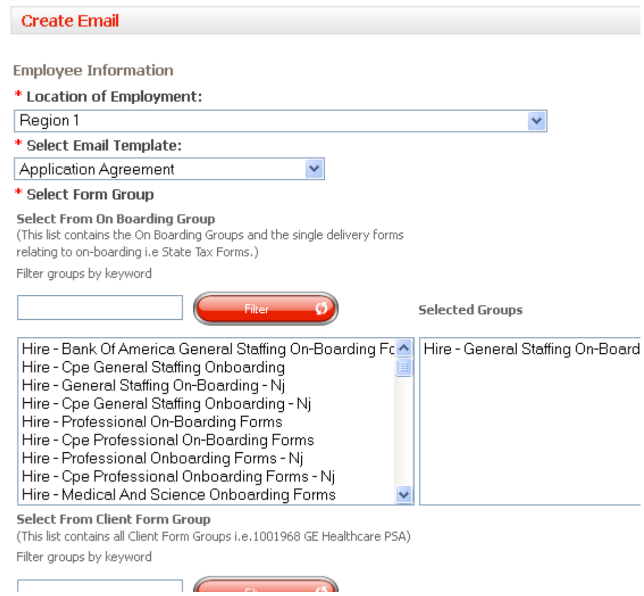
Rehire an Employee in USVerify

When REHIRING an employee you will need to determine whether they are a "Reactivate" Employee or a "Rehire" Employee. **Please follow the Rehire Reactivate policy to make that determination**. You can use US Verify to deliver the forms to them that they need to complete for their rehire.

Step	Instruction	Action
1.	To **Rehire** an Employee in US Verify: Conduct a search for the Employee record. For more detailed steps on how to conduct a Search see the Conducting Searches section of this document. Note: Rehire/Reactivate form has already been completed and a hiring decision has been made.	
2.	For Rehired Employees: • Enter the **date of the last assignment** • Click the **Submit** button ***Note:*** In US Verify the Employee will be put into a "Pending" status until new forms are completed.	
3.	• Click the **Rehire Options** button	
4.	The **Available Groups** page opens. To add forms or form groups: To filter: • Enter the keyword for your form/form group into the filter field and click the **Filter** button OR • Scroll through the available forms listing • Select necessary **form or form group** • **Double click form/form group** to add to **Selected Groups** column ***OR*** From bottom of page click **Add Form Group>>** button to add to **Selected Groups** column	

Step	Instruction	Action
5.	A new email template will be created for the Employee. • Follow steps 3-8 in the Setting up the Employee, Email (only) Process section of this document to complete the email to the employee process.	
6.	After completing all required fields • Click the **Send** button An email will automatically generate to the Employee via US Verify	

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Generate Additional Forms

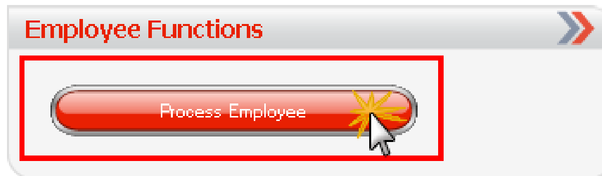
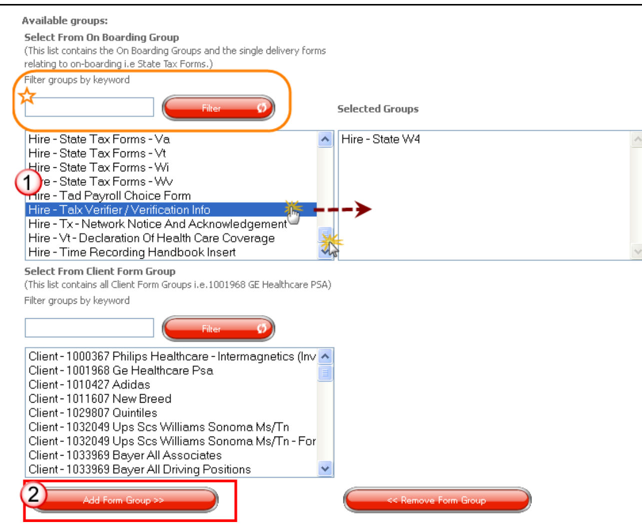
Additional forms can be considered any forms generated to an employee after his/her US Verify file has been created. This can be the Client form packets AFTER the OnBoarding forms are sent from US Verify and even existing forms re-sent for the purpose of the employee making updates/changes to specific form information.

Client Forms

US Verify allows you to deliver Client required forms quickly and easily if the Employee is already in US Verify. You should always start by checking the Contract Administration site to see if there are any additional forms not found in US Verify. Additionally, only Employee facing forms have been loaded into US Verify. Any form that the Employee does not need to see, Example: Checklist, background requirements will not be loaded into US Verify

Update Employee Forms

An Employee may come to you while on assignment or in “Available” status and request that a particular form be updated. Most commonly requested updates are: **Federal and State W4** and **Direct Deposit** form. Employees can update EXISTING forms by resending the forms via the **Assign Form Group** button from within the **Employee Record.**

Step	Instruction	Action
1.	To assign **Additional Forms** to an employee Conduct a search for the Employee record. For more detailed steps on how to conduct a Search see the Conducting Searches section of this document.	
2.	The **Employee Quick View tab** will open From the **Employee Functions** section • Click the **Process Employee** button	
3.	To assign the **forms** • Click the **Assign Form Group** button	
4.	The **Available Groups** page opens. To add forms or form groups: To filter: • Enter the keyword or customer number for your form/form group into the filter field and click the **Filter** button OR • Scroll through the available forms listing • Select necessary **form or form group** • **Double click form/form group** to add to **Selected Groups** column *OR* ▪ From bottom of page click **Add Form Group>>** button to add to **Selected Groups** column	

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td colspan="2">

Client Form Group *SEARCH TIP*

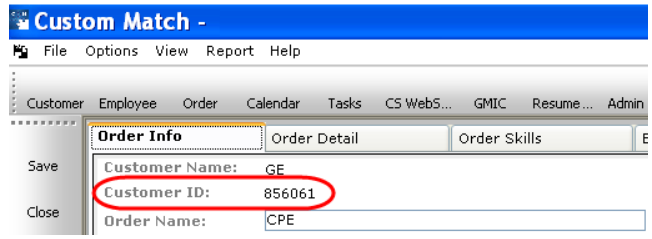
- In Custom Match (CM): Look at the Assignment and get the **Customer #** directly from the **Order**

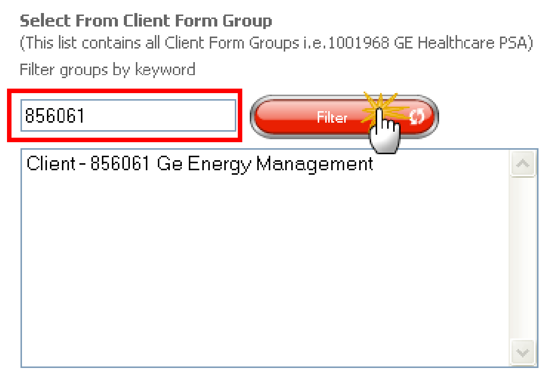
In US Verify
- Type the **Customer #** in the field and then
- Click the **Filter** button

All of the package(s) and/or form(s) associated to that customer should appear. This will help sort through the list of form packages.

NOTE: If no results appear in the listing then the Customer ID entered has no associated Client Forms in the US Verify system.

</td><td>





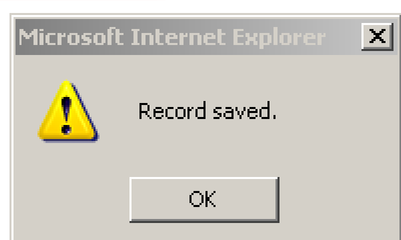
</td></tr>
<tr><td>5.</td><td>

For **Remote** (employee at home completion)
- Click the **Assign & Email** button

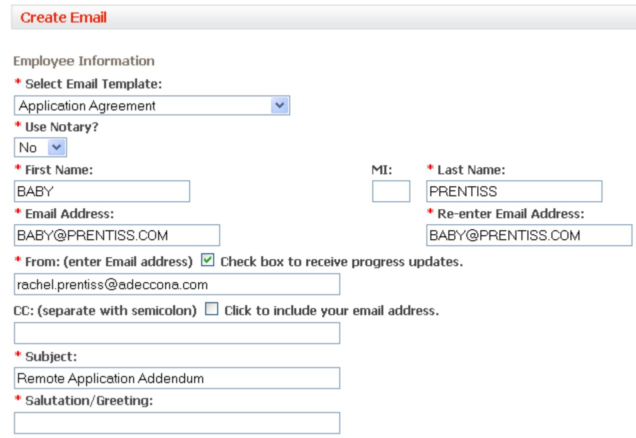
For **In Branch/Office**
(employee using in office testing PC)
- Click the **Assign & Save** button

- A Confirmation popup will appear letting you know that the form has been **saved** to the Employee Record in US Verify, Click the **OK** button

</td><td>



</td></tr>
</table>

Step	Instruction	Action
6. Remote only	The **Create Email** page will appear. The template will be populated with the information entered when the employee originally created his/her file. • **Review the information** ▪ Ensure fields with **red asterisks** are populated and information is accurate If use of a Notary is required at this point please review the Notary section of this document for more detailed information.	
7. Remote only	After all required fields are complete • Click the **Send** button *An email will automatically generate to the Employee via US Verify	
The Employee will follow the same process to complete the Assigned Form(s) as done when completing the On-Boarding process. See The Employee Experience section of this User Guide for In Branch and Remote Employee completion steps.		

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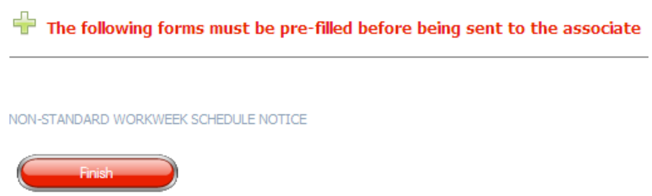
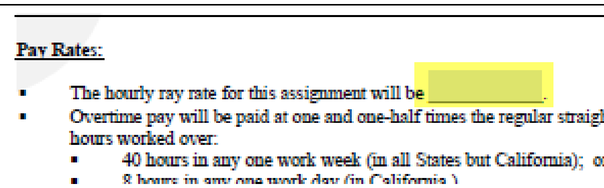
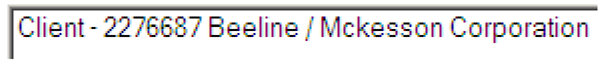
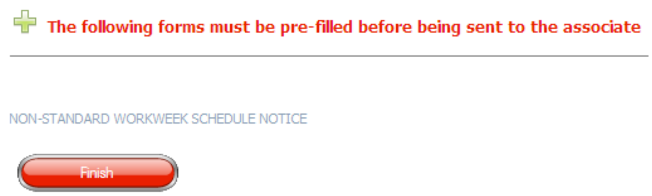
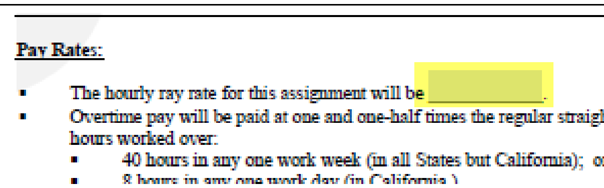
Colleague Process: Emailing form that needs to be customized

Step	Instruction	Action
1.	From the **Email** screen: • Select **"Hire"** and/or **"Customer"** forms Complete the rest of the email template as instructed in the "Email Process" section of the US Verify User guide.	Client - 2276687 Beeline / Mckesson Corporation
2.	At the bottom of the Email screen • Select "**Send**"	Send
3.	A new page will open with the form available as a link that needs to be customized. • Select the "**Form**" *Note: Do not click the "Finish" button before you customize the form.*	Please complete the following form(s) so that it can be delivered to the Associate. NON-STANDARD WORKWEEK SCHEDULE NOTICE Finish
4.	Form will open. • Complete field(s) that need to be customized • Select "**Submit**"	**Pay Rates:** ▪ The hourly ray rate for this assignment will be ______. ▪ Overtime pay will be paid at one and one-half times the regular straigh hours worked over: ▪ 40 hours in any one work week (in all States but California); or Submit
5.	You will be brought back to Screen with form(s) listed. (Refer to Step 3 for visual). • Select "**Finish**"	Finish
6.	Dashboard Page will appear and email will be sent to Employee.	Dashboard Working Cases

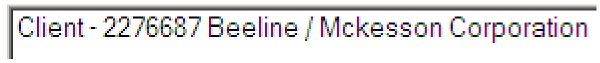
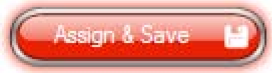
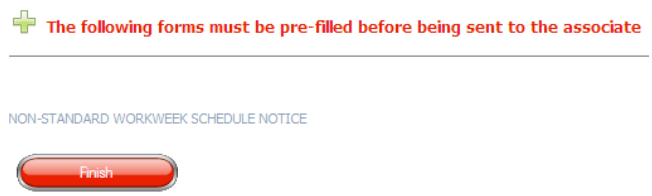
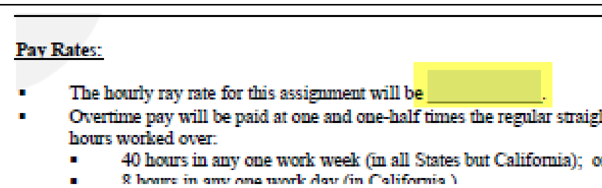
Colleague Process: Assign Form Group Section: Email form that needs to be customized from an Employee Record

Step	Instruction	Action
1.	From the **Employee's Record** go to the Assign Form Group section: • Select **"Hire"** and/or **"Customer"** forms	From the **Email** screen: • Select **"Hire"** and/or **"Customer"** forms Complete the rest of the email template as instructed in the "Email Process" section of the US Verify User guide.
2.	• Select "**Assign & Email**"	
3.	A new page will open with the form available as a link that needs to be customized. • Select the "**Form**" *Note: Do not click the "Finish" button before you customize the form.*	
4.	Form will open. • Complete field(s) that need to be customized • Select "**Submit**"	
5.	You will be brought back to Screen with form(s) listed. (Refer to Step 3 for visual). • Select "**Finish**"	
6.	Email screen will open up. Complete the rest of the email template as instructed in the "Email Process" section of the US Verify User guide.	
7.	At the bottom of the Email screen • Select "**Send**"	
8.	Dashboard Page will appear and email will be sent to Employee.	

Colleague Process: PrePopulate form that needs to be customized

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>1.</td><td>From the PrePopulate screen:
Select “Hire” and/or “Customer” forms
Complete the rest of the PrePopulate template as instructed in the “PrePopulate Process” section of the US Verify User guide.</td><td></td></tr>
<tr><td>2.</td><td>At the bottom of the PrePopulate screen
Click the Save Info to Pending Queue button</td><td></td></tr>
<tr><td>3.</td><td>A new page will open with the form available as a link that needs to be customized.
Select the Form
*Note: Do not click the “Finish” button before you customize the form!!</td><td></td></tr>
<tr><td>4.</td><td>Form will open.
Complete field(s) that need to be customized.
Click Submit</td><td></td></tr>
<tr><td>5.</td><td>You will be brought back to Screen with form(s) listed. (Refer to Step 3 for visual).
Click the Finish button</td><td></td></tr>
<tr><td>6.</td><td>Dashboard Page will appear and email will be sent to Employee.</td><td></td></tr>
</table>

Colleague Process: Assign Form Group Section – PrePopulate form that needs to be customized from Employee Record

Step	Instruction	Action
1.	From the **Employee's Record** go to the Assign Form Group section: • Select **"Hire"** and/or **"Customer"** forms	
2.	• Click the **Assign & Save** button	
3.	A new page will open with the form available as a link that needs to be customized. • Select the **Form** **Note:* Do not click the "Finish" button before you customize the form.*	
4.	Form will open. • Complete field(s) that need to be customized. • Click the **Submit** button	
5.	You will be brought back to Screen with form(s) listed. (Refer to Step 3 for visual). • Click the **Finish** button	
6.	**Employee Record** page will appear. • **Assign Form Group** will appeared grayed out.	

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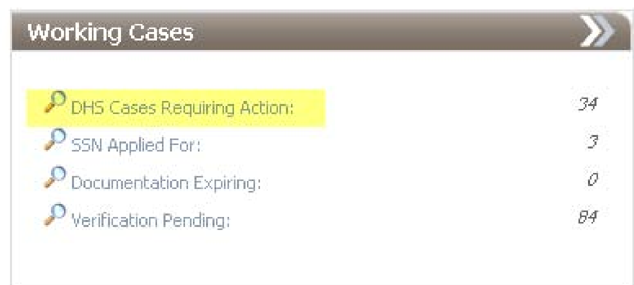
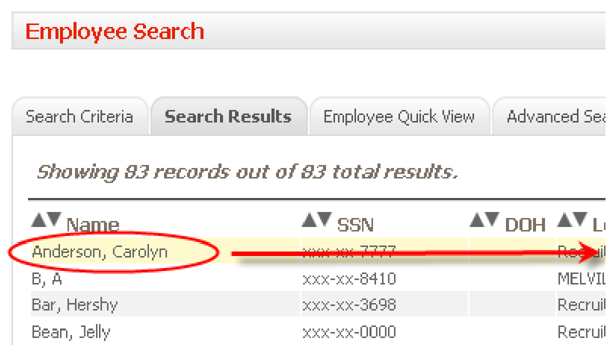
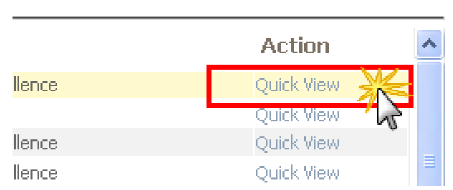
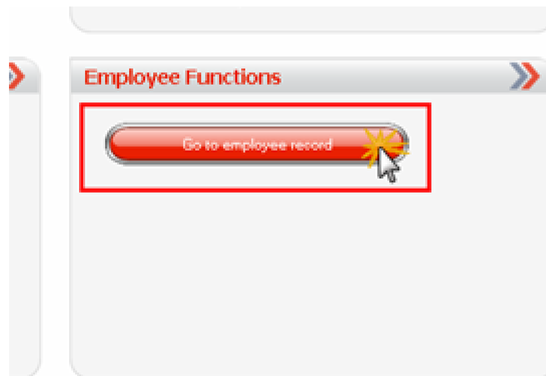
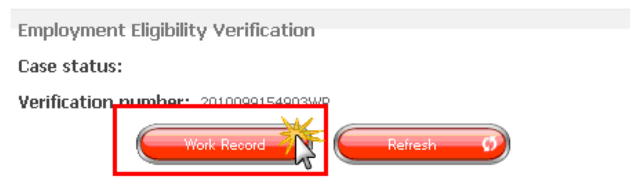
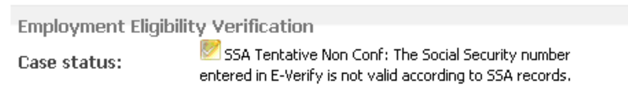
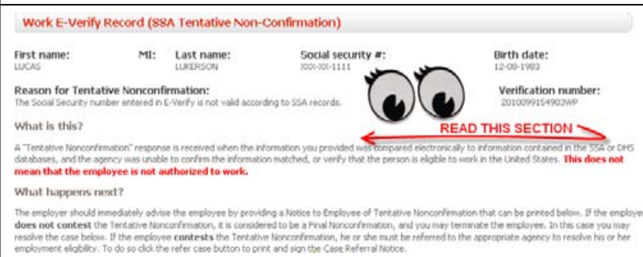
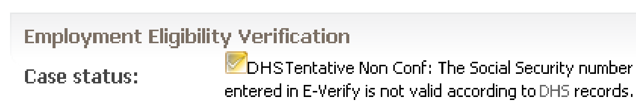
Managing E-Verify Cases

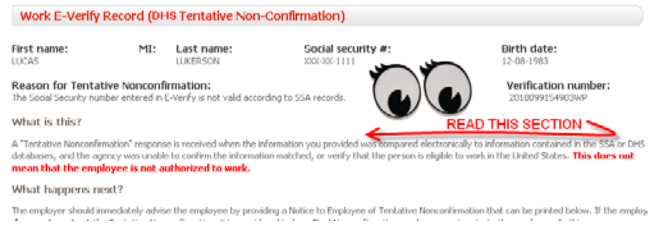
After the Employee has completed their On-Boarding documents and you have completed Section 2 of the I-9 form then it is time to manage and finalize the E-Verify cases.

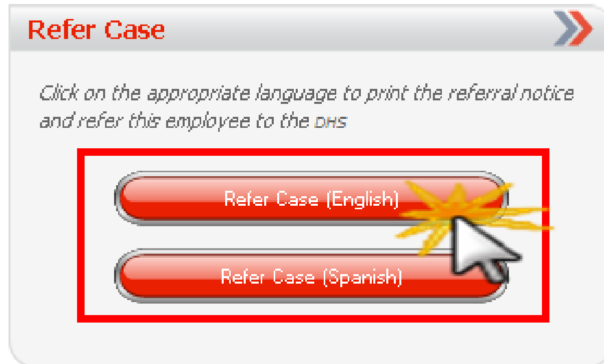
Step	Instruction	Action
1.	To **Work an E-Verify Record** (If you are not already at your main home page or **Dashboard**) From the left **Menu** Select **Dashboard**	
2.	From the **Working Cases** section • Click the **DHS Cases Requiring Action** hyperlink	
3.	Locate the name of the Employee needing E-Verify case resolved From the far right **Action** column Click the **Quick View** hyperlink to open the **Employee Record**.	 

Step	Instruction	Action
4.	The **Employee Quick View tab** will open • Click the **Go to Employee Record** button	
5.	Under the **Employment Eligibility Verification** section: • Click the **Work Record** button	
6.	 The **Work E-Verify Record** page will open. Depending on the employee's result you will be provided instructions on how to proceed in the main portion of this page. You will be presented with the **Resolve Case** scenarios. You will **choose the applicable resolution for your result**. **Important!** ***All E-Verify cases <u>must</u> be resolved*** Below are the different **Case Status**' and the steps for resolving each **Case Status** result	
<u>Case Status Results</u>		
EA 1	**Employment Authorized** The case will need to be resolved. • Click the **Resolve Case** button	

Step	Instruction	Action
SSA Ten-non conf. 1	**SSA Tentative NonConfirmation** The message states SSA found the Social Security Number to be invalid. This could happen for many reasons; the simplest being a typo on the forms to something more complicated such as the Employee's identity/ SSN has been compromised. In this situation the Employee has the option to take action to resolve the issue and continue working (contest) or to self terminate (not contest) and forfeit employment.	
SSA Ten-non conf 2	AFTER CLICKING THE **Work Record** button (step 5) and arriving at the **Work E-Verify Record** page (step 6) • **Read all of the information carefully** In the case of **SSA Tentative Non Confirmation** the Social Security Administration is tentatively not going to confirm whether this employee is authorized to work or not. ***IMPORTANT NOTE!*** Tentative Non Confirmation CANNOT be used to withhold employment.	
SSA Ten-non conf 3.	After reading the information carefully: • Click the **Print the Tentative NonConfirmation Notification** button (Choose the language appropriate for the employee). The letter the employee needs to resolve the case will be printed. • **Give the letter to the employee**	
SSA Ten-non conf. 4.	If the employee chooses **<u>NOT to Contest</u> :** **1.** Select the **Self Terminated** radio button The **Termination Date field** will appear **2.** **Enter** a **Self Terminated Date** **3.** Click the **Resolve Case** button	

Step	Instruction	Action
SSA Ten-non conf 5.	If the employee chooses to **<u>Contest</u> :** • Click on the **Refer Case** button • Provide the Employee with the printed letter for their follow up activity (Choose the language appropriate for the employee) This letter provides instructions for the candidate to <u>GO to</u> the Social Security Administration Office to resolve the case. The candidate has **eight (8) Federal Working days to <u>visit</u> the SSA Office and resolve his/her case**. You will need to return to this area of the system at a later date to check for resolution and resolve the case. **All E-Verify cases MUST be resolved in the system!**	
Again: **<u>Tentative Non Confirmation CANNOT be used to withhold employment.</u>**		
DHS Ten-non conf 1.	**DHS Tentative NonConfirmation** The message states Department of Homeland Security found the Social Security Number to be invalid. This could happen for many reasons; the simplest being a typo on the forms to something more complicated such as the Employee's identity/ SSN has been compromised. In this situation the Employee has the option to take action to resolve the issue and continue working (contest) or to self terminate (not contest) and forfeit employment.	

Step	Instruction	Action
DHS Ten-non conf 2.	AFTER CLICKING THE **Work Record** button (step 5) and arriving at the **Work E-Verify Record** page (step 6) • **Read all of the information carefully** In the case of **DHS Tentative Non Confirmation** the Department of Homeland Security is tentatively not going to confirm whether this employee is authorized to work or not. ***IMPORTANT NOTE!*** **<u>Tentative Non Confirmation CANNOT be used to withhold employment.</u>**	
DHS Ten-non conf 3.	After reading the information carefully: • Click the **Print the Tentative NonConfirmation Notification** button (Choose the language appropriate for the employee). The letter the employee needs to resolve the case will be printed. • **Give the letter to the employee**	
DHS Ten-non conf 4.	If the employee chooses **<u>NOT to Contest</u> :** **4.** Select the **Self Terminated** radio button The **Termination Date field** will appear **5.** **Enter** a **Self Terminated Date** **6.** Click the **Resolve Case** button	

Step	Instruction	Action
DHS Ten-non conf 5.	If the employee chooses to **<u>Contest</u> :** • Click on the **Refer Case** button • Provide the Employee with the printed letter for their follow up activity (Choose the language appropriate for the employee) This letter provides instructions for the candidate to **CALL** the Department of Homeland Security to resolve the case. The candidate has eight (8) Federal Working days to **<u>CALL</u>** (not visit) the **<u>DHS Office</u>** and resolve his/her case. You will need to return to this area of the system at a later date to check for resolution and resolve the case. **All E-Verify cases MUST be resolved in the system!**	
Again: **<u>Tentative Non Confirmation CANNOT be used to withhold employment.</u>**		

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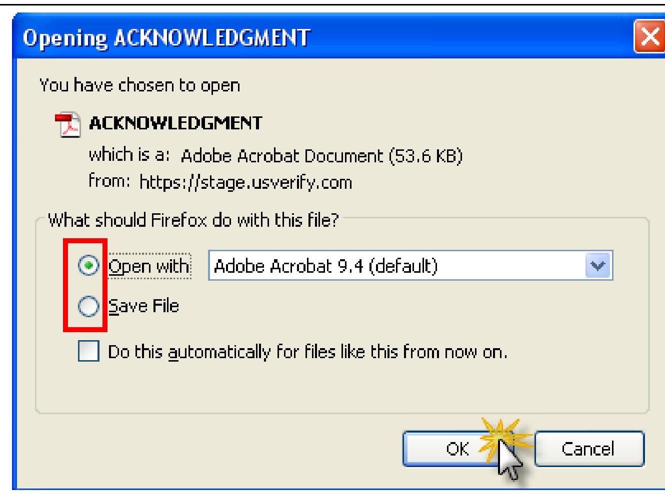
Printing and Saving Forms

Step	Instruction	Action
1.	Go to the Employee record: To conduct a search for the Employee record. For more detailed steps on how to conduct a Search see the [Conducting Searches](#) section of this document.	
2.	From the right side of the screen under the **Documents** section: • Click the **globe icon** <u>to the left of</u> the form you wish to **print** or **save**	
3.	A print/save popup will appear • Select the **Open With** radio button to open the document for printing • Then click the **OK** button OR • Select the **Save File** radio button to save the file to a location • Then click the **OK** button	

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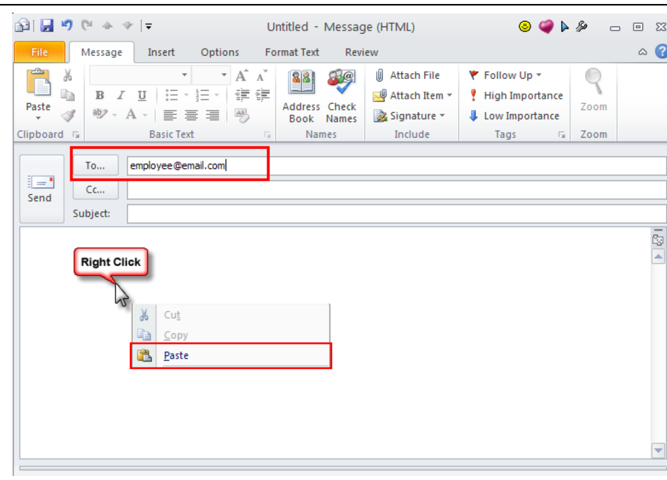
What to do when an Employee does not receive the US Verify Email

If an employee does not receiver his/her US Verify Email with the link to his/her file you will need to copy the link from the original file witin the Employee Record, and then resend the link.

To conduct a search for the Employee record. For more detailed steps on how to conduct a Search see the Conducting Searches section of this document.

Step	Instruction	Action
2.	From within the Employee file: • Click on the **Copy Email Link To Clipboard** button	
3.	• Open your **Outlook Email** • Generate a new email **addressed to the employee** • **Right Click** your mouse and **paste the link into the email**	
4.	The Employee will copy and paste the URL into their browser and see this screen: ***NOTE:*** **This URL is matched with that specific Employee's record in US Verify.** **- Do not send as a generic URL.**	

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Instruction
Duplicate SSN with USVerify: **1A. Employee already applied** US Verify does not accept duplicate SSNs. This may occur for a couple of reasons. One, the Employee may have applied in one branch and already has an Employee Record in US Verify. The solution to this scenario would be to research the Employee's record in CM and locate the office in which s/he has their record. If the Employee will be transferring to your office, complete the transfer in CM. Twenty four hours after you make the transfer in CM, USVerify will transfer the Employee record. You will need to reschedule the Employee to come back to the office to update any necessary forms after their US Verify Employee file arrives in your office. Remember to confirm whether this Employee is a Reactivation/Rehire and follow the applicable process. The duplicate record can be deleted in US Verify. **1B. Fraudulent Social Security Number** The second situation in which a duplicate record may occur is if an SSN has been used fraudulently, creating two records with the same SSN. Your Employee may be sitting in your office when you run into this situation so you must handle this situation with sensitivity. Instructions for how to resolve what may appear to be SSN fraud is covered in the Single Employee Database Policy. Please inform your Employee that it appears that more than one person is using the same SSN. **Do not assume the Employee in front of you is the not the rightful owner of the SSN!** Provide them the instructions contained in the policy so they can know the steps to take to prove they are the rightful owner. They will need to return to the office with the necessary documentation at a later date. Ask the Employee to reschedule their appointment as soon as they have the needed documentation so you can finish their forms.

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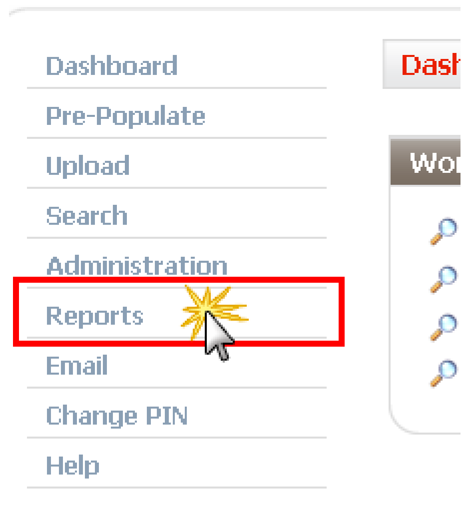
Reports

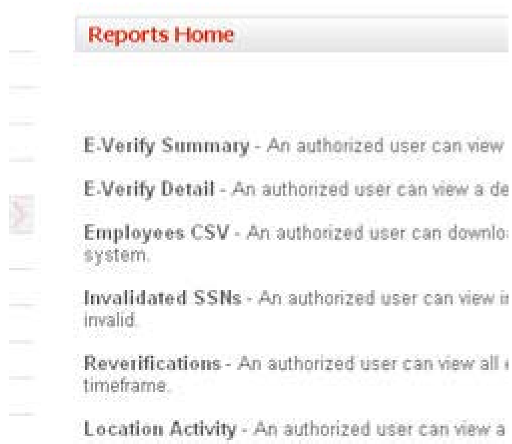
Many of the reports in the system are US Verify reports and not reports developed specifically for this company.

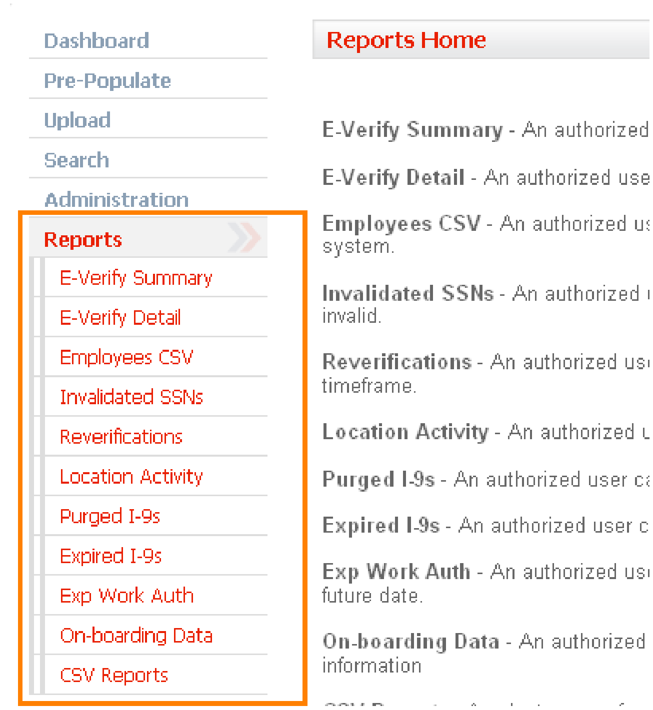
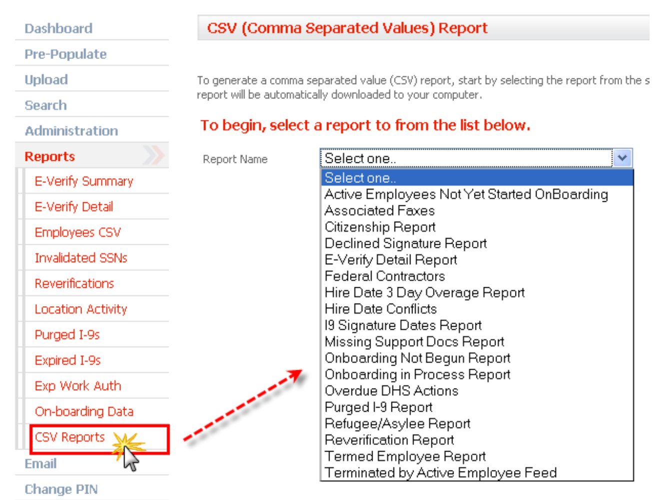
This section will cover:
- How to locate a report in US Verify
- How to create/run a report
- Which reports the offices should run and review regularly

Locating a Report

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>1.</td><td>After logging into USVerify

From the left Menu
Select Reports</td><td>
</td></tr>
<tr><td>2.</td><td>The Reports page opens

A brief description of all the high level reports is provided on this page.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>3.</td><td>The left toolbar, under the Reports link lists a standard list of available reports</td><td>
</td></tr>
<tr><td>4.</td><td>To locate additional “one click” reports
Click the CSV Reports link
Click the Report Name drop down menu arrow
A list of available CSV “one click” reports will appear listed for selection.</td><td>
</td></tr>
</table>

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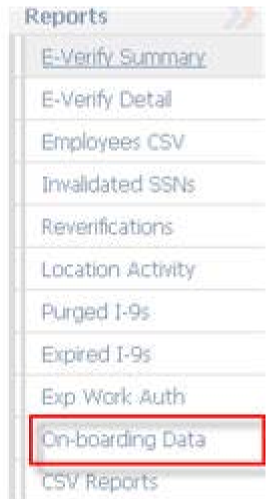
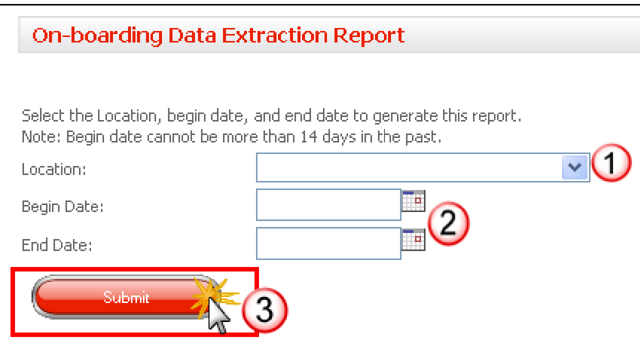
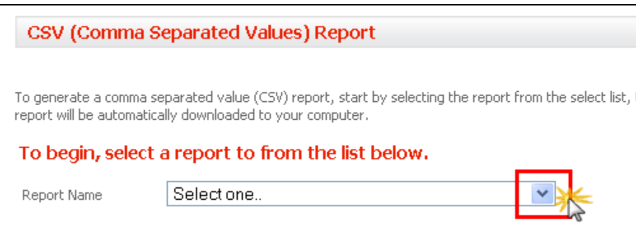
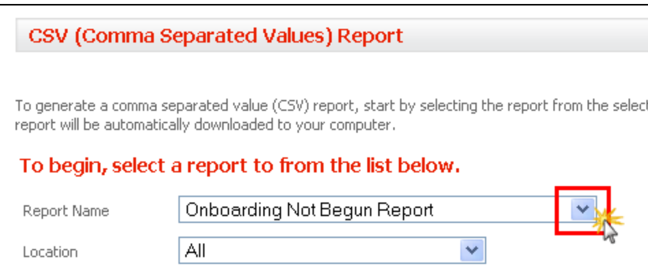
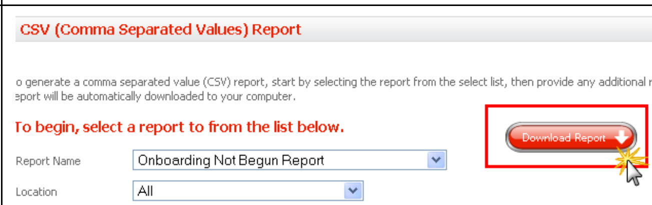
Creating/Running a Report

Step	Instruction	Action
1.	**Reports with Criteria** To run a report • Select the **desired report** from the report menu.	
2.	The **Report Criteria** page opens. **1.** In all reports you will have a location field. You will only be able to select a location if you have access to multiple offices **2.** Some reports have a date range criteria that can be set • **Enter desired criteria** **3.** Click the **Submit** button	
3.	The **File Download** popup will open • Click the **Open** button Note: To open reports you may need to ensure your popup blockers are turned off.	
4.	• **Double click** the report to open	

<table>
<tr><th>Step</th><th>Instruction</th><th>Action</th></tr>
<tr><td>1.</td><td>CSV Reports

From the Reports sub menu options
• Select CSV Reports</td><td>
</td></tr>
<tr><td colspan="3">The CSV Reports are an entire separate set of reports that are all generated in Comma Separated Value (CSV) format. These reports when opened appear in Excel, but if saved will need to be <u><saved as> .xls files</u> if you plan to reopen and view as Excel to sort data etc.
NOTE:
When running reports - certain reports can be saved and some should <u>never</u> be saved to your computer. Social Security Numbers and Bank Information is extremely confidential information and should <u>NEVER EVER</u> be saved on your computer. Never put yourself or our company in a situation where data can be compromised.</td></tr>
<tr><td>2.</td><td>The CSV Report page will open
• Click the Report Name field drop down menu arrow</td><td>
</td></tr>
<tr><td>3.</td><td>• Select desired report from the list of menu options Select any report, and then
• Complete the report criteria

Again, all reports will have a location but only some will have a date range.</td><td>
</td></tr>
<tr><td>4.</td><td>After criteria is selected/entered:
• Click the Download Report button</td><td>
</td></tr>
</table>

Step	Instruction	Action
5.	The **File Download** popup will open • Click the **Open** button Note: To open reports you may need to ensure your popup blockers are turned off.	
6.	• **Double click** the report to open	

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Important Reports to Review

There are three major reports the offices should be reviewing on a regular basis.

On-Boarding Data	This report lists all the information you will need to complete your candidate's record in CM. It lists their name, completed date, tax information and direct deposit information. The location and a date range should be selected. The date range should be one day and printed daily to complete all records of employees on the same day.
Expiring Work Authorization	Should be reviewed on a weekly basis depending on your market. It is a simple PDF report that lists Name, partial SSN, 'work until date', and 'days to expire'
E-Verify Summary Report	Should be reviewed on a weekly basis. This report is a simple PDF report that lists a breakdown of E-Verify transactions by office. This report will help you identify the E-Verify cases that require your action to resolve them.

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Key Points to Keep in Mind

1. Do not send more then one email to the same Employee.

2. The Employee will be in "Pending" section only if ALL of their forms are completed and Section 2 of the I-9 form still needs to be completed.

3. If you have access to more then one office then make sure that the Employee is assigned to the correct office location.

4. The forms listed under On-boarding Documents are in **Blue** if they are completed and **Black** if they are not completed.

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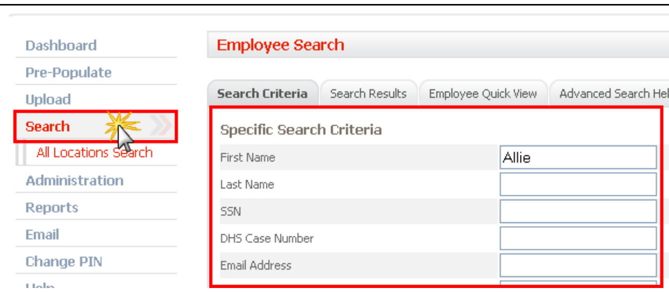
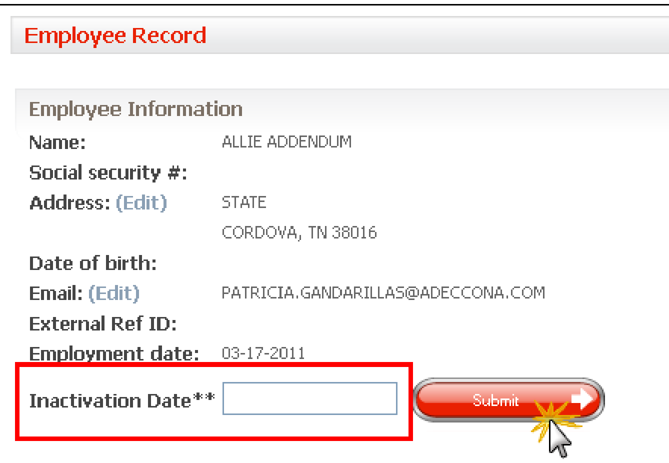
Addendum

Inactivation Date Field

To clear unused form/packets from the dashboard the packet will need to be marked as inactive. To inactivate a packet use the Inactivate Date field.

This process is used for three main reasons:

1. **Rehiring** an employee (see Rehire section of this User Guide)
2. Employee appears on the dashboard for document completion/updates, but is **unresponsive** for a period of time
3. Record is active, but employee becomes **ineligible** for employment with Adecco

Step	Instruction	Action
1.	To clear records off your dashboard from the **Working Cases** section select the case type	
2.	Or search for the employee record by entering desired criteria into the **Search** section	
3.	Select the **Employee Record** • Locate the **Inactivation Date**** field • Enter **date** of inactivation • Click the **Submit** button **Note**: If you need the **Inactivation Date**** field removed, then please submit a request to **eService**.	

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