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About This Job Aid

This job aid is designed to help USG web managers perform common tasks inside Compliance Center’s Web Manager view. Each job aid is tailored to a specific user role within the system and provides step-by-step instructions on tasks available to that role.

Be advised that business processes associated with Compliance Center that exist outside the system itself are considered out of scope for purposes of this document.

About This Role

The **USO Support** User Role is a powerful role available to USO staff only. It is designed for Shared Services Center staff who provide first tier support for Institutional web managers across the University System.

USO Support has a wide range of **Compliance Center** abilities, allowing it to view and interact with all onboarding data for new hires at any USG Institution. This includes sensitive tax, direct deposit, and personal information. USO Support also has access to a flexible set of support functions, making it well-suited to assist new hires access Employment Center and complete their onboarding documents.

USO Support has limited **I-9 Management**. It can only search and view Form I-9 information for an Institution’s new hires. It cannot edit or otherwise interact with Form I-9.

System Roles:
- HRXRole (Compliance Center): USOSupport
- UserRole (I-9 Management): EmployerSuperUser
- Location: All USG Institutions
Log in to Compliance Center

Access Compliance Center’s web manager interface using your Institution’s Single Sign On (SSO) credentials.

1. Go to the Compliance Center web manager URL:
   o https://federationx.talx.com/ClaimsAwareHelper/?whr=https://idpproxy.usg.edu/idp/shibboleth&wctxt=HRXWebManager
2. Select your USG Institution from the USG Single Sign on Authentication page.
3. When prompted, enter your Institution SSO login and password.
4. Complete your institution’s two-factor authentication procedure.
5. You will be redirected to the red/gray Compliance Center web manager interface.

Notes:
   • Users already logged into an authenticated SSO session with another OneUSG system (ex: OneUSG Connect) will skip steps 2-4.
   • Link to DEV environment:
     o https://ct2.federationx.talx.com/ClaimsAwareHelperCT2/?whr=https://idpproxy-dev.usg.edu/idp/shibboleth&wctxt=HRXWebManager
Use search criteria to locate a new hire’s onboarding packet.

1. Log in to Compliance Center
2. Click Search Employees
3. Enter search criteria:
   a. Last 4 of SSN
   b. First Name (partial values acceptable)
   c. Last Name (partial values acceptable)
4. Click View

5. Search results will display the following:
   a. Name / Social Security Number: (last 4 digits only)
   b. Location / Position: (Institution or Department / STANDARD)
   c. Creation Method / Creation Date: Manual or Batch / Timestamp of packet creation
   d. Start Date / Status (New hire start date / new hire’s current progress through onboarding process)

Notes:
- You will only see search results for new hires in your Location(s).
- New hire name / last 4 of SSN will display as a different color in search results if you have previously viewed them.
View Workflow Summary

View summary of all packets in your Location, by current Packet Status.

1. Log in to Compliance Center
2. Click Workflow Summary
3. Enter Filter by criteria:
   a. Workflow Date: All packet states
   b. Creation Date: Date of packet creation
   c. Start Date: New hire start date
4. Set Begin Date and End Date to refine search
5. Click View
6. Click green + to expand individual packet status

Notes:
- You will only see search results for new hires in your Location(s).
View Packet Summary

View a summary of new hire employee information and packet information.

1. Search Employee
2. Click name / last 4 of SSN of new hire
3. Packet Summary tab will display by default
   a. Employee info:
      i. Login ID: system-generated new hire login for Employment Center
      ii. Social Security Number: last 4 digits only
      iii. Full Name: From Create Packet process or Personal Information document
      iv. Street Address: From Create Packet process or Personal Information document
      v. Telephone Number: From Create Packet process or Personal Information document
      vi. E-mail Address: From Create Packet process or Personal Information document
      vii. Location: Institution or department name. From Create Packet process
      viii. Position: will always show as STANDARD
      ix. Hire Type: New hire packet template. From Create Packet process.
      x. Start Date: New hire start date. From Create Packet process.
   b. Packet Info:
      i. Creation Date: Timestamp of packet creation.
      ii. Created By: Name of web manager who created packet
      iii. Creation Method: Manual or Batch
      iv. Workflow State: New hire’s progress through onboarding process
      v. Tax Credit Eligibility
      vi. I-9 Status
Notes:
- You will only see search results for new hires in your Location(s).
- All system timestamps are in Central Standard Time (CST)
View Onboarding Document

View all selections / data entered by a new hire on a specific onboarding document.

1. **View Packet Summary**
2. Click on **Documents**
3. Click **View** next to onboarding document you wish to see
4. You will see a snapshot of the document, complete with all new hire selections and data
5. Click **Return to Summary** when finished

Notes:
- You will only see onboarding documents available to your specific User Role.
View Activities Log

View a chronological list of actions taken by the new hire (or the system) on an onboarding packet. Useful for troubleshooting.

1. **View Packet Summary**
2. **Click on Activities**
3. **Activities Log** will display the following:
   a. **Activity:**
      i. A system-generated event, usually an email notification to the new hire
      ii. An action taken by the new hire, usually completion of an onboarding document
   b. **User:**
      i. <blank> for system activity
      ii. First Name / Last Name for new hire activity
   c. **Date / Time: (CST)**

Notes:
- You will only see onboarding documents available to your specific User Role.
- All system timestamps are in **Central Standard Time (CST)**
View Workflow History

View a chronological list of workflow states. This list is updated whenever a state is changed. Useful for troubleshooting / audits.

1. **View Packet Summary**
2. Click on **Workflow History**
3. Workflow History will display the following:
   a. Previous Workflow State
      i. The “Before” state
   b. Event
      i. The “After” state
   c. User:
      i. System for system activity (usually triggered by new hire completing documents)
      ii. First Name / Last Name for Web Manager hire activity
   d. Date / Time: (CST)

**Examples:***

<table>
<thead>
<tr>
<th>Previous Workflow State</th>
<th>Event</th>
<th>User</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filling Out Employment Forms</td>
<td>Completed Documents</td>
<td>System</td>
<td>2/19/2020 11:25 AM</td>
</tr>
<tr>
<td>Filling Out Personal Information</td>
<td>Completed Documents</td>
<td>System</td>
<td>2/19/2020 11:25 AM</td>
</tr>
<tr>
<td>Packet Created</td>
<td>Editing Document</td>
<td>System</td>
<td>2/19/2020 11:22 AM</td>
</tr>
</tbody>
</table>

**Notes:**
- You will only see onboarding documents available to your specific User Role.
- All system timestamps are in **Central Standard Time (CST)**
Generate PIN

Reset the PIN number a new hire uses to log in to Employment Center to complete their onboarding documents.

1. View Packet Summary
2. Click Generate PIN
3. Equifax will generate a new PIN and send a “Your New Hire Password” email to the new hire.
4. Click OK

Notes:
- New hires may need to check their Junk Mail filters/folder to see email.
- Emails will typically be sent out from Equifax between 1 to 10 minutes after this action is taken. Depending on a new hire’s email provider, it may take longer for a new hire to receive the message.
- All new hire emails originate from donotreply@equifax.com
- All new hire emails originate from the following Equifax IPs:
  - 12.104.201.4
  - 12.104.201.5
- Emails will typically be sent out from Equifax between 1 to 10 minutes after this action is taken. Depending on a new hire’s email provider, it may take longer for a new hire to receive the message.
Resend Invitation

Resend a “Your New Hire Documents Are Ready” email to new hire.

1. View Packet Summary
2. Click Send Invitation
3. Equifax will send a “Your New Hire Paperwork is Ready” email to the new hire.
4. Click OK

Notes:
- New hires may need to check their Junk Mail filters/folder to see email.
- All new hire emails originate from donotreply@equifax.com
- All new hire emails originate from the following Equifax IPs:
  - 12.104.201.4
  - 12.104.201.5
- Emails will typically be sent out from Equifax between 1 to 10 minutes after this action is taken. Depending on a new hire’s email provider, it may take longer for a new hire to receive the message.
Create Packet

Create an onboarding packet, a login, and a PIN for a new hire so they can access Employment Center and complete their onboarding paperwork.

- Log in to Compliance Center
- Click Create Packet
- Enter new hire SSN (if available)
- Click Continue
- Enter required **Personal Data** fields:
  - First Name
  - Last Name
  - E-mail Address
  - Confirm E-mail
- Enter required **Job Data** fields:
  - Start Date: mm / dd / yyyy via pulldowns
  - Location: Click > to access Location chooser. Select Institution or department
  - Position: Always select “STANDARD”
  - Hire Type: Select appropriate new hire packet template
- Click **Create Hire Packet**
- New hire will be sent the following:
  - “Your [Institution] New Hire Documents Are Ready” email
  - “Your New Hire Password” email
Notes:

- Packet templates for ALL USG Institutions appear in the Hire Type pulldown, regardless of the user’s Location. Be careful!
- All new hire emails originate from donotreply@equifax.com
- All new hire emails originate from the following IPs:
  - 12.104.201.4
  - 12.104.201.5
- Emails will typically be sent out from Equifax between 1 to 10 minutes after this action is taken. Depending on a new hire’s email provider, it may take longer for a new hire to receive the message.
## Cancel Packet

Cancel an onboarding packet that was created by mistake or contains inaccurate information.

1. **View Packet Summary**
2. **Click Cancel Packet**
3. **Confirm cancellation by clicking OK**
4. **“New hire packet has been cancelled” message will appear. Click OK**

![Confirm Cancel Packet Dialogue](image)

**Notes:**
- Cancelling a packet is a quiet action; it does not send any notification to a new hire.
- Packets canceled by mistake can be restored.
- The Cancel Packet button will not appear if a packet is currently in a cancelled state.
Restore a Cancelled Packet

Restore a packet that was cancelled by mistake.

1. **View Packet Summary**
2. **Click Take Action**
3. From pulldown menu, select **Return to Previous State**
4. **Click Apply**
5. Confirm restoration by clicking **OK**

**Notes:**
- Restoring a canceled packet is a quiet action; it does not send any notification to a new hire.
- New hire’s existing link and login credentials will still function with restored packet.
Edit Hire Packet

*Edit basic new hire information entered incorrectly during Create New Hire procedure.*

1. **View Packet Summary**
2. **Click** Edit Hire Packet
3. **Change** **Personal Data** (as needed)
   a. Social Security Number
   b. First Name
   c. Middle Initial
   d. Last Name
   e. Physical Address
   f. Telephone Number
   g. E-mail Address
4. **Change** **Job Data** (as needed)
   a. Start Date
   b. Location
   c. Position
5. **Click** Save Changes

**Notes:**
- Edit Packet is only available **before** new hire has completed the Personal Information document in their packet.
- Hire Type (a.k.a. Packet Template) cannot be changed once a packet is created. The packet must be cancelled.
Add / View Attachment

Add an attachment to a new hire’s onboarding packet or view an existing one.

1. View Packet Summary
2. Click Attachments
3. Click New Attachment
4. Enter FileName you want Compliance Center to use for attachment
5. Click +Choose File
6. Select document to attach
7. Click Add
8. "Changes saved" message will appear. Click OK

Notes:
- Accepted attachment types: .pdf, .png, .jpg, .jpeg, .gif, .tiff
- Attached documents have 10MB size limit.
- Most common attachment is a scan of signed/notarized USG Loyalty Oath.
Download / Print Onboarding Documents

Generate a single file containing one or more onboarding documents to download and/or print.

1. View Packet Summary
2. Click on Documents
3. Click check box next to document(s) you wish to save/print.
4. Click Print Checked
5. Compliance Center will generate a single file containing all selected documents in a separate window.
6. Download / print document as needed.

Notes:
- It can take some time for Compliance Center to generate a file, especially if a large number of documents are selected.
Access I-9 Dashboard

Access full I-9 dashboard for your Location to complete any I-9 functionality allowed by your role.

1. **Log in to Compliance Center**
2. **Click I-9 Management**

Welcome to I-9

Notes:
- The I-9 Management view is separate from, but looks similar to the Compliance Center web manager view. To return to the Web Manager view from I-9 Manager, click **Back to Compliance Center**.
Search for Employee (I-9)

Search for employee by entering personal information, Location, Start Date, etc.

1. Log in to Compliance Center
2. Click I-9 Management
3. Click Search for employees
4. Enter one or more search criteria
   a. First Name
   b. Last Name
   c. SSN
   d. Type of I-9
      i. Completed
      ii. Partner Completed
   e. Group
   f. Location
   g. Date Range (mm/dd/yyyy to mm/dd/yyyy)
   h. Include:
      i. Active Employees
      ii. Terminated Employees
      iii. Current Location Only
5. Click Search
6. Search Results will display:
   a. Type: I-9 Type
      i. E: E-Verify
      ii. C: Complete
      iii. P: Pending
      iv. R: Reverification
      v. S: SSN Applied For
      vi. D: Receipt Due
      vii. M: Missing
      viii. I: Invalid
      ix. F: E-Verify w/o I-9 (Red: Problem Bold: Urgent)
   b. Name: Click to view employee information
   c. Location: USG Institution/Dept of Employment
   d. SSN: last 4-digits only
   e. Employment: New Hire Start Date
Notes:

- Click the Help tab inside the I-9 Management view at any time for additional support.
Support Model Overview

As part of the OneUSG Careers project, Compliance Center has multi-tier support model, involving staff from USG Institutions, the Shared Services Center, ITS, and Equifax. This section outlines the different levels of the support model and their high-level support responsibilities.

- **Institution HR Practitioners**
  - a.k.a. Institution Web Managers
  - Supports Institution’s New Hires
  - Creates / cancels new hire packets
  - Changes new hire passwords
  - Resends new hire email invitations
  - Views documents / completes data entry
  - Completes Form I-9
- **Tier 1 (Shared Services Center)**
  - Supports Institution HR Practitioners
  - Escalates issues to Tier 2
- **Tier 2 (Shared Services Center Security Admins)**
  - Creates Web Managers
  - Sets Web Manager Location
  - Sets Web Manager User Roles
  - Revoke Web Manager access
- **Tier 3 (ITS Admins)**
  - Supports Institution Web Managers + SSC
  - Technical issues
  - Escalates to Tier 3 (Equifax)
  - Liaises with Equifax on:
    - document, packet changes
    - New / custom documents
    - system issues
- **Vendor Support (Equifax)**
Support Resources

- **Contact the USG Shared Services Center**
  - oneusgsupport@usg.edu
  - 1-877-251-2644
  - [https://www.usg.edu/shared_services_center/](https://www.usg.edu/shared_services_center/)

- **Equifax Workforce Solutions Status Page**
  - Provides up to date system status information for Equifax services, including Compliance Center
  - [https://status.equifaxworkforce.com/](https://status.equifaxworkforce.com/)

- **Equifax I-9 Video Tutorials**
  - How to Request I-9 Reports
    - [https://www.i9express.com/demos/i-9-reports-training-module](https://www.i9express.com/demos/i-9-reports-training-module)
  - How to Complete Section 2 Using a Pending Record
    - [https://www.i9express.com/demos/section-2-training-module](https://www.i9express.com/demos/section-2-training-module)
  - How to Reverify an Employee Using Section 3
    - [https://www.i9express.com/demos/section-3-reverification-training-module](https://www.i9express.com/demos/section-3-reverification-training-module)
  - How to Update an Employee’s Name or Enter a Rehire Date Using Section 3
    - [https://www.i9express.com/demos/section-3-name-change-and-rehire-training-module](https://www.i9express.com/demos/section-3-name-change-and-rehire-training-module)
  - How to Update a Receipt Due
    - [https://www.i9express.com/demos/i-9-management-receipt-due](https://www.i9express.com/demos/i-9-management-receipt-due)
  - E-Verify Overview
    - [https://www.i9express.com/demos/what-is-everify](https://www.i9express.com/demos/what-is-everify)
  - Common E-Verify Responses
    - [https://www.i9express.com/demos/common-e-verify-responses](https://www.i9express.com/demos/common-e-verify-responses)
  - Additional E-Verify Responses
    - [https://www.i9express.com/demos/additional-e-verify-responses](https://www.i9express.com/demos/additional-e-verify-responses)