

Client Training HQ

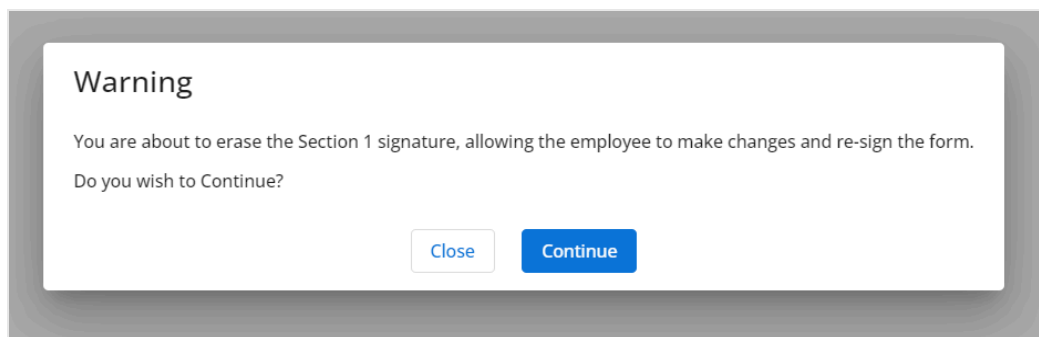
Guardian Edits and Amendments

Editing an I-9 - Prior to Final I-9 Approval

Forms I-9 in Guardian require **Completion** and then a final **Approval**. Before the approval stage, Section 1 can be edited by the employee, and Section 2 should be edited by the original Section 2 verifier. After final Approval, to correct an I-9, an Amendment must be created and approved.

Section 1 Edit (In Person method)

1. Access the Employee's I-9 Record. From the I-9 Record, access the Details tab.
2. Click on the **View Section 1** link. (You may need to click the side bar **View** tab on the left and select **Expand All Panels**).
3. In the upper right corner, click the **Edit Section 1** link. This will unlock Section 1 and remove the original signature and signed date.
*(If the **Edit Section 1** link doesn't appear, this likely means that the I-9 is already approved. To have the I-9 corrected, proceed to the Amendments Section of this guide.)*
4. An alert will appear stating "You are about to erase the Section 1 signature, allowing the employee to make changes and re-sign the form. Do you wish to Continue?".



5. Clicking Continue will allow the employee to edit their Section 1, but will also add a new signed date documented on the Form I-9 once they make the edit. Click **Continue** to proceed. If the edit is completed after their first day of work, this may result in a late Section 1 signed date.
6. After clicking Continue, if the workflow is in-person, a "Launch Employee Workflow" button will appear. This will require you handing your device to the employee to make the edit and resubmit their E-signature.

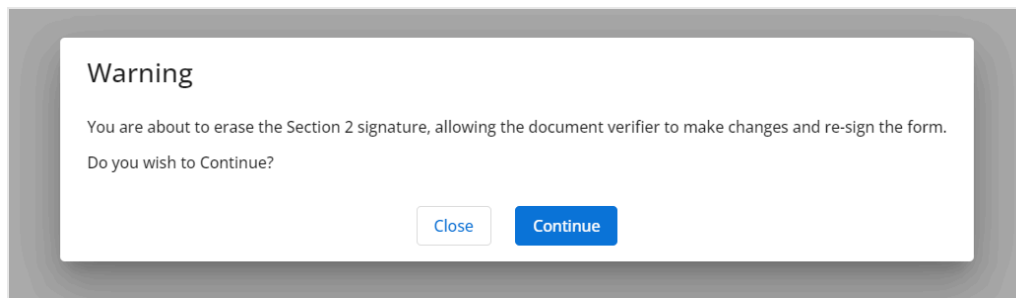
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Section 1 Edit (Remote method)

1. **Repeat Steps 1-5 above.**
2. When the "Launch Employee Workflow" screen appears, click the **Go Back** button, return to the Dashboard, or close the page. (**Do not** click the *Launch Employee Workflow* button.)
3. Instruct the employee to click on the **original link** they received, answer the security questions, make the edit(s) and re-sign Section 1.
Note: *If the employee's link expired or they aren't able to locate the original link, access the Employee Record, Login Info tab, and click 'Generate New Link' button.*
4. The next screen will be an email page that can be sent to the employee with the new link to access. Click the **Send E-Mail** button.

Section 2 Edits

1. From the **I-9 Record**, access the Details tab.
2. Click on the **View Section 2** link. (You may need to click the side bar **View** tab on the left and select **Expand All Panels**).
3. In the upper right corner, click the **Edit Section 2** link.
(*If the **Edit Section 2** link doesn't appear, this likely means that the I-9 is already approved. To have the I-9 corrected, proceed to the Amendments Section of this guide.*)
4. An alert will appear stating "You are about to erase the Section 2 signature, allowing the document verifier to make changes and re-sign the form. Do you wish to Continue?".



5. Clicking **Continue** will allow the original verifier to edit Section 2.
Note: *Any edits to Section 2 are recommended to be completed by the **original verifier**, as once the edit is completed, a new signature and date will be date stamped to Section 2. The signer on Section 2 confirms they were indeed the individual who verified the documents for Section 2 when presented by the employee.*
6. Click **Continue** to proceed.

This process will also add a new signed date documented on the Form I-9. If the edit is completed after the three days from the employee's first day of work, this may result in a late Section 2 signed date.

Amendments

1. On the **I-9 Record**, click the **Amendments** tab, click the **Add** button.

The screenshot shows the top navigation bar with tabs: Dashboard, Start I-9, Employee, E-Verify, and Reports. Below this is a header for 'I-9 for Employee, Sample' with buttons: View Employee, View E-Verify, Refresh, Update and Go Back, Update Info, Go Back, and Delete. A sub-header shows tabs: Details, OnDocs, Issues, and Amendments (highlighted with a red box). Below the sub-header is a table titled 'I-9 Amendments'. At the bottom right of the table, there are buttons: Refresh, Show Special Amendment Options, View I-9, Actions, Adjust I-9, and Add (highlighted with a red box and a red arrow pointing to it).

On the next screen:

1. **First**, click the desired **Section** to amend (Section 1 or Section 2 on the left column)
2. **Next**, select the **Field to Amend** (on the right column) to be amended
3. **Finally**, click **Edit Field**. *Once the items are selected, they will turn blue as shown below.*

The screenshot shows the 'Amend I-9' screen. At the top, there are buttons: Go Back, Edit Field (highlighted with a red circle 3), and a red circle 3. Below the buttons is a table with two columns: 'Section' and 'Field to Amend'. The 'Section' column has two rows: 'Section 1' (highlighted with a red circle 1) and 'Section 2'. The 'Field to Amend' column has a list of fields: Last Name, First Name, Middle Initial, Other Names Used, Street Address (highlighted with a red circle 2), Apt Number, City, State, Zip Code, Date of Birth, Social Security Number, and E-mail Address. The 'Current Value' column shows the current values for each field. The 'Street Address' field is highlighted in blue.

2. The screens below show the Section 1 and Section 2 fields chosen for the Amendment. Click **Create Amendment** or **Create Amendment and Add Another**.

The screenshot shows the 'Amend I-9 for Employee, Sample' screen for Section 1. It displays the 'Field Name' as 'Street Address' and the 'Old Value' as '555 Main'. There are checkboxes for 'Create For Employee (check to have employee make the change)' and 'Strike-out Original Value'. The 'New Value' field is empty. At the bottom, there are buttons: Go Back, Create Amendment (highlighted with a red box and a red arrow), and Create Amendment and Add Another.

The screenshot shows the 'Amend I-9 for Employee, Sample' screen for Section 2. It displays the 'Field Name' as 'Document #' and the 'Old Value' as 'XXXXXXXXXXXX'. There is a checkbox for 'Strike-out Original Value'. The 'New Value' field is empty. At the bottom, there are buttons: Go Back, Create Amendment (highlighted with a red box and a red arrow), and Create Amendment and Add Another.

- Choose the Amendment alert method to the employee, either in-person or via email. Click the **caret symbol** on Actions

The screenshot shows the 'I-9 for Employee, Sample' page. The 'Amendments' tab is selected. A table lists amendments with columns: Data Field, Original Value, Amended Value, Note of Record, and Modified By. Two amendments are shown: (I) Street Address and (II-B) Document #. The 'Actions' dropdown menu is open, showing options: Notify Employee by E-Mail, View/Send Employee Approval Notes, Employee Approve Section 1, Approve Section 1, and Approve Non Section 1 Amendments. Red arrows point to the 'Actions' dropdown and the 'Notify Employee by E-Mail' option.

Section 1 Amendments (Employee):

- The email will include a link, once clicked, the employee will answer the security questions.
- A notification will appear, allowing the employee to enter the correct information in the corresponding fields. *The employee may need to click the **Check Issues** button for the screen to refresh.*

The screenshot shows the 'LawLogix Guardian Demo' interface. It displays a 'Hello!' message and a notification about I-9 form amendments. Below this is a table titled 'I-9 Section 1 Amendments' with columns: Data Field, Original Value, New Value, Reason, and Modified By. Two items are listed: (1) Date of Birth and (2) Social Security #. To the right of the table is an 'Approval' section with two 'I Approve' checkboxes. Below the table is an 'Approval Comments' section with a text input field and 'Update Comments' and 'Check Issues' buttons. At the bottom is an 'Approve Amendments' section with an 'Electronically Sign Amendments' button. Red arrows point to the 'Check Issues' button and the 'Electronically Sign Amendments' button.

- The employee will click the checkbox next to the amended item(s), read the information and then click the **I Accept** checkbox.

4. The employee will then choose a memorable answer to a question of their choosing and will click the **Electronically Sign** button.

Electronic Signature

You, the employee, must approve the changes you made above by electronically signing this amendment to your Form I-9. By signing this form, you attest under penalty of perjury that the information you provided is complete, true and correct.

Step 1: Please verify that the first name, last name, and date of birth shown below belong to you by clicking the checkbox next to each item.

☒ First Name

Sample

☒ Last Name

Employee

☒ Date Of Birth

XX-XX-XXXX

Step 2: Read the following statement and select "I Accept" to acknowledge your agreement:

I consent to provide an electronic signature in connection with this Form I-9 amendment and understand that by verifying my name and date of birth in Step 1 above, providing the requested information in Step 3 below, clicking on the "I Accept" box, and clicking on the "Electronically Sign" button, that I am electronically signing this amendment to the Form I-9, and recording my initials and today's date next to each amended entry. I understand that my electronic signature will be binding as though I had physically initialed and dated this document by hand.

☒ I Accept

Step 3: Please select a signature question from the dropdown list, provide an answer, and click "Electronically Sign" to complete your electronic signature. The question selected should call for information that you have committed to long-term memory and is not easily guessed or researched. Please note that the question and answer may be presented to the Department of Homeland Security in the event of an audit as proof that you have electronically signed this document.

Question:

What is the name of the first school you attended?

Answer:

ABC

Electronically Sign

5. The employee will receive a confirmation.

Guardian Demo Site

Welcome back Sample!

You are currently up-to-date with your employment eligibility paperwork.

There is nothing for you to do at this time.

If you would like to view and/or print a receipt for your electronic I-9, click [Here](#).



Section 2 Amendment (System User):

1. If a Section 2 Amendment has been created, it can be approved after any Section 1 amendments have been approved by the employee.

2. Click the Approve Non Section 1 Amendments.
3. A warning will appear. To approve the amendment, enter your Guardian password, SSO ID or credential used to login to the system. Click **Submit and Go Back**. (Or, you can click the **Cancel** button if this amendment requires changes or is not yet ready to approve.)

4. When viewing the Form I-9, the red strike-out, correction, individual's initials and date of approval will be visible. Before any Amendments are approved, the 'initials' will only show "??" until approved. **Note: Amendments will show on the I-9 as shown. Edits will not be visible on the I-9 when viewed, (but will be in the Audit trail).**

E-Verify Amendments: Typographical Errors

After approving the I-9, The E-Verify® status screen may display **Attention Required**. This section will address how to handle a detected error on a mismatch of information E-Verify case result.

1. Two columns of information will appear. The left column will show the data that was entered and the right column will show what will be submitted to E-Verify. If the information shown appears to need a correction, click the **Amend I-9** button.

Note: If you choose to ignore the discrepancy, click the **Continue with Case** link, and the I-9 will be sent to E-Verify.

Attention Required: Verify I-9 Information
E-Verify requests you review and verify the correctness of some of the I-9 information submitted.

Case Verification Number :

Information For Review

E-Verify requests a review of the I-9 information for the fields included below. Utilize the amendment tool to correct any data entry errors before continuing the E-Verify case.

	Information Originally Received	Information to be Submitted
First Name	Sample	Sample
Last Name	Employee	Employee
Date of Birth	XX/XX/XXXX	XX/XX/XXXX
Social Security Number	XXX-XX-XXXX	XXX-XX-XXXX
US Passport Number	XXXXXXXX	XXXXXXXX

[Amend I-9](#) [Continue with Case](#)

Document Information

Document Type: **Form I-9**

Things You Should Know

- The information received by E-Verify for the fields shown on this page may be correct. An amendment to the I-9 should only be made if a data entry error is identified for the given field.
- When continuing a case, Guardian submits to E-Verify the current I-9 information for the fields shown, including approved amendments.

2. The screen will refresh to the I-9 Record, Amendments tab. Continue with the correction by referring to the Amendments steps outlined in the **Amendments section** of this guide.

Please refer to the **Guardian Connections** page for more training guides and resources!

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.