EQUIFAX®

Client Training HQ

HR Portal: Employee Dashboard for HR Users

Employee Dashboard Details

The Employee Dashboard is a single-page overview of the employee profile. The dashboard surfaces key data points without the need for navigating through the interface.

Accessing the Employee Dashboard

HR users will be able to access the Employee Dashboard page through the HR portal.

> ***Note:*** Users can also search and navigate to an employee profile to view the details in full screen.

Searching for an employee displays a list of employees and all visible processes for the employees.

Selecting either the employee name or the **View Employee Dashboard** button in any row will take the user to the Employee Dashboard for the selected process.

The Employee Dashboard summarizes employee and case data on a single concise display. Each subsection of information is arranged into logical groupings on “cards”.

Explanation of the individual Sections of the Employee Dashboard

The **Employee** card surfaces data points about the employee including:

- Name
- Case Number and Process Type
- Employee ID (If entered)
- DOB and Nationality Information
- Current Status & NIV Max Out date

The **View HR Information** button will open a secondary card with an expanded set of information about the employee from the Management Info section of the employee profile. The View button is accessible to HR users based on assigned permissions from the Administrator.

The Process drop-down menu will permit HR users to navigate between open matters in place for the employee. Relevant information from the various cards will update based on the selected Process Type.

Copyright © 2026, Equifax Inc., Atlanta, Georgia. All rights reserved. Equifax and the Equifax marks used herein are trademarks of Equifax Inc. Other product and company names mentioned herein are the property of their respective owners.

The **Job Description** card will display a summary of information about the position for the employee. Using the **View All Job Information** button will open a secondary card with additional information about the job.

The **Visa Priority** card displays visa bulletin information being tracked by the firm for the employee. The latest monthly visa bulletin information will be displayed with the employee's priority date and preference category.

Alongside the Visa Priority card is the **Upcoming Expirations** card. This card will display any upcoming expirations tracked by the firm. The expirations will display the most immediate expiration types first, followed by future expiration dates listed in date order. Clicking on **View All** gives an overview of all future expiration dates being tracked for the employee.

The **Employee Dependents** card displays a subset of information regarding the employee's dependents. Clicking **View All Dependents** will open a secondary page to show a full list of the employee's dependents.

The **Employment History** card displays information regarding the employee's employment history as collected by the firm. The records will display the three most recent records first. If the employee has employment records that extend beyond the three most recent, a **View All** button will appear to enable access to an extended page listing all of the employment records collected.

Forms for Review presents a listing of forms prepared by the firm for review by the HR user. Forms may be downloaded by the HR user and marked as "Reviewed" to indicate that they have reviewed the form. The Reviewed notification will appear on the Forms page under the HR Sig column.

The **Shared Documents** card provides a location for sharing of documents relevant to the selected immigration process. Documents enabled for sharing by the firm may be downloaded from this card.

The **Recent Activity** card will display the most recent activities and their completion dates. Any receipts attached to an activity will also display and provide a means for checking case status. The card will show the three most recent activities. Clicking **View All Activity** will display a full view of activities related to the selected process.

Checking Case Status provides a shortcut to check the latest status regarding a receipt (USCIS) is provided for receipts entered into the Activities page. Clicking on the **Copy Receipt Number and go to lookup** button will copy the Receipt Number and automatically open the USCIS Case Status Online page**.** Right click in the Receipt Number field and paste the Receipt Number into the field**.** Click on **Check Status** to get the latest status information from USCIS**.**

Required Documents provides a listing of the documents needed by the law firm to complete the selected process. Documents may be uploaded directly from this page and downloaded as necessary by the HR user. HR users can also add supplementary documents and may replace previously uploaded documents with a new version using the provided icons.

> ***Note:*** Replaced documents will be removed from view but maintained within client OnDocs for management by the Firm.

Clicking **View all Required Documents** will provide an expanded listing of all Required Documents.

Explanation of the **Required Documents** Icons:

- **Upload** enables the adding of Required Documents via the document upload screen.
- **Download** provides the ability to download the selected documents.
- **Replace File** will allow the uploading of a new document in place of a previously uploaded Required Document.

  Note: Replaced documents will be removed from view, but maintained within the system for management by the Firm.

- **Add Supplementary Document** will permit the uploading of supporting documents to a previously uploaded **Required Document**

Employee Submitted Document(s) and the **Submitted Questionnaire(s)** sections provide HR users with insight into information submitted by the employee regarding the selected process.

Clicking on the document's name will provide the user with the ability to download the selected document. The default listing will show the document(s) in the firm-defined listing order. Selecting **View All Documents** will open an expanded listing.

Clicking on the questionnaire's title will enable the HR user to view the information submitted by the employee as part of their completed questionnaire submission. This information will display in a new window.

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.