EQUIFAX®

Client Training HQ

Creating a Report of Clients (Foreign Nationals or FNs)

The Reports module allows you to compile report data within a scope across your client base. Reports can be run once completed or saved as a template for future use.

To create a report of FN clients:

1. Select **Reports** from the left navigation menu.
2. Under **Select Report Type**, select **Interactive** from the drop-down menu.
3. Click **View**.
4. After the screen refreshes, click **New** from the action bar at the top of the screen.
5. Select **Report**.
6. Select **FN + Process** as the data type.
7. Click **Continue**.

   Note: This setting will pull all FN- and Process-level data and make them available as the report column selections.

8. Click the **General** tab.
9. Enter/select the following:
   - **Report Name**
   - **Sharing Options**
   - **Report Folder**
   - **Report Generation Mode**
   - **Report Style**

10. Click **Update Info**.
11. After the page reloads, click the **Reports Columns** tab.
12. Select the specific information you want displayed on the report (e.g. Beneficiary Name, Citizenship, Process, Current Status, various expiration types).
13. Click **Update Info**.
14. After the page reloads, click the **Report Criteria** tab.
15. Select the items you wish to use to filter the report (e.g. Case Status, Process types, Company Petitioner, etc.).
16. Click **Update Info**.

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17. Click **Run Report** to generate the report, or for reports over 1,000 records, schedule the report to run on a specific day by selecting a day of the week from the **Automatic Update** pop-up menu.

    Note: There are limits on the overall size of any single report. Manually run reports have a limit of 1,000 records. Scheduled reports are limited to 5,000 records. Reports containing more than 10,000 records cannot be produced. To determine if your report is within these limits, click **Calculate**.

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.