



Client Training HQ

How to Configure Public Service Loan Forgiveness Letters

What is the Public Service Loan Forgiveness Feature?

The Public Service Loan Forgiveness (PSLF) form fulfillment feature leverages the employment data employers contribute to The Work Number® as part of PeopleHQ™ to help complete the form for employees.

This allows employees to self-service generate the form more quickly, typically without the need to engage you or your HR team, depending on what required data elements are within your data feed. In order for your employees to begin using the PSLF letters feature, the letter will first need to be configured by your HR Admin. Below you will find a step-by-step guide to configure the PSLF letters for your employees.

Ensure your account is configured for PSLF Letters. Once you're logged into The Work Number as a part of PeopleHQ, navigate to the left side menu and click **Letters Center**. Once in **Letters Center**, you should see the **Public Service Loan Forgiveness (PSLF)** tile. If you do not see the PSLF tile, please reach out to Workforcesolutionssupport@equifax.com to request it to be enabled.

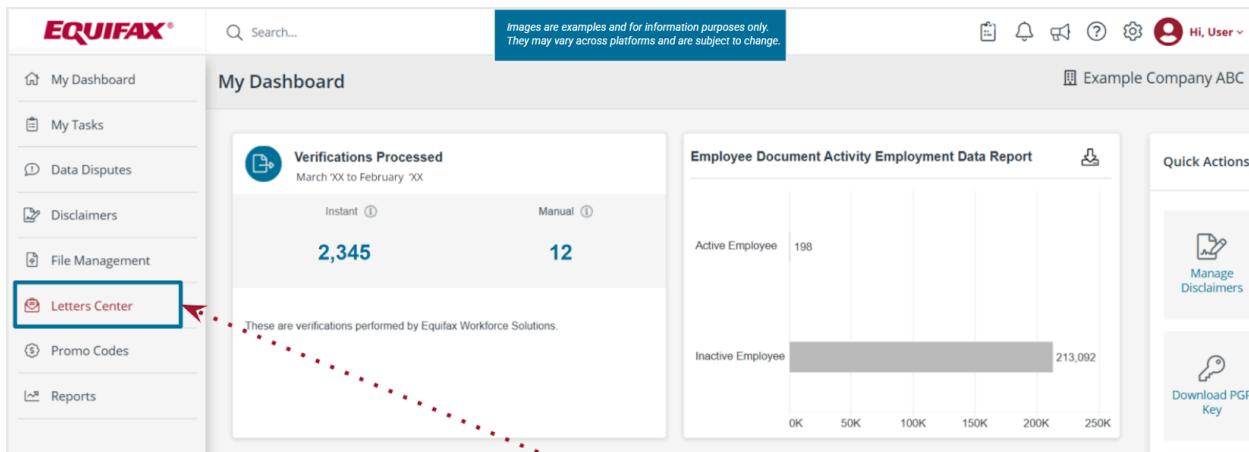
The screenshot shows the 'Letters Center' section of the PeopleHQ platform. At the top, there is a search bar and a message stating 'Images are examples and for information purposes only. They may vary across platforms and are subject to change.' On the right, there are user profile and navigation icons. Below the header, a message says 'Below are the letters available for your organization. You can make updates or review these templates. Published letters will be available to download by your employees.' The main area displays several letter templates in cards:

- Employment & Income**: Shows an employee's current income and employment status to provide proof to a third-party outside of requests from credentialed verifiers.
- Employment**: Shows an employee's current employment status and employment history to provide proof to a third-party outside of requests from credentialed verifiers.
- Immigration**: Can be used to show the U.S. Citizenship and Immigration Services or government embassies proof of employment and income for an employee.
- Public Service Loan Forgiveness**: Employees can show Public Service Loan Forgiveness (PSLF) eligibility with this form. This tile is highlighted with a red box and an arrow points to it from the bottom left.
- Remote Work Letter**: Employers can generate this letter to provide to eligible employees who need to provide proof of remote work status.

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

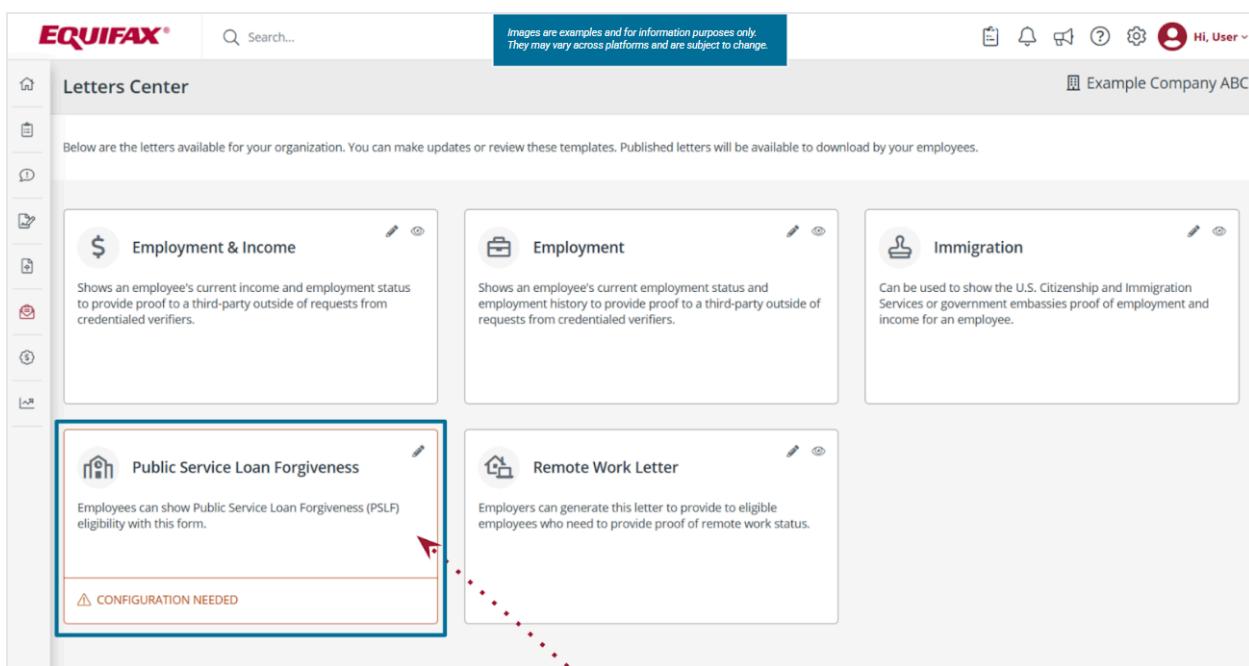
Adding FEINs

- Once the feature is enabled, log in to The Work Number as a part of PeopleHQ and click **Letters Center** from the left side main menu or click **Configure Letters** in the **Quick Actions** menu on the right.



The screenshot shows the PeopleHQ dashboard. On the left sidebar, the 'Letters Center' option is highlighted with a red box and a red arrow pointing to it. The main content area displays a 'Verifications Processed' section with a chart showing 2,345 Instant and 12 Manual verifications. Below this is a note: 'These are verifications performed by Equifax Workforce Solutions.' To the right is an 'Employee Document Activity Employment Data Report' chart showing Active Employee (198) and Inactive Employee (213,092) counts across a range from 0K to 250K. The top right corner shows a user profile 'Hi, User' and the company name 'Example Company ABC'. The top bar includes a search bar and a note: 'Images are examples and for information purposes only. They may vary across platforms and are subject to change.'

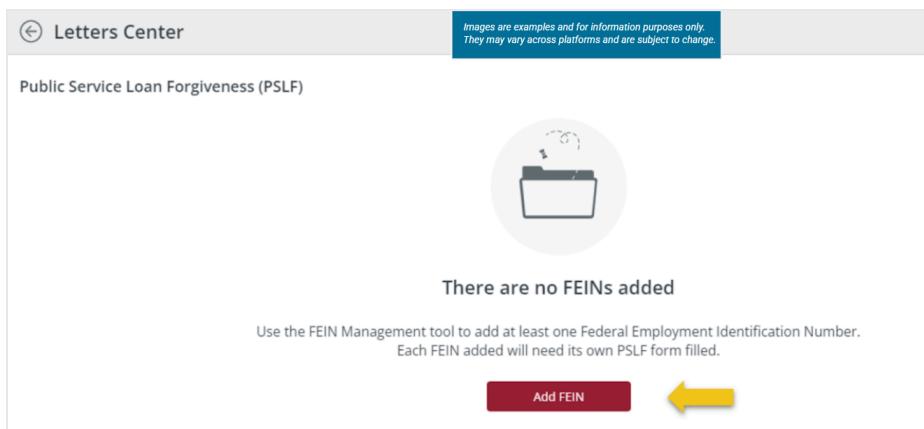
- Click the **pencil** icon in the Public Service Loan Forgiveness tile.



The screenshot shows the 'Letters Center' page. The left sidebar has a 'Letters Center' option. The main content area lists several letter templates: 'Employment & Income', 'Employment', 'Immigration', 'Public Service Loan Forgiveness' (which is highlighted with a red box and a red arrow), and 'Remote Work Letter'. Each tile provides a brief description and edit/publish icons. The 'Public Service Loan Forgiveness' tile notes: 'Employees can show Public Service Loan Forgiveness (PSLF) eligibility with this form.' and '⚠ CONFIGURATION NEEDED'. The top right corner shows a user profile 'Hi, User' and the company name 'Example Company ABC'. The top bar includes a search bar and a note: 'Images are examples and for information purposes only. They may vary across platforms and are subject to change.'

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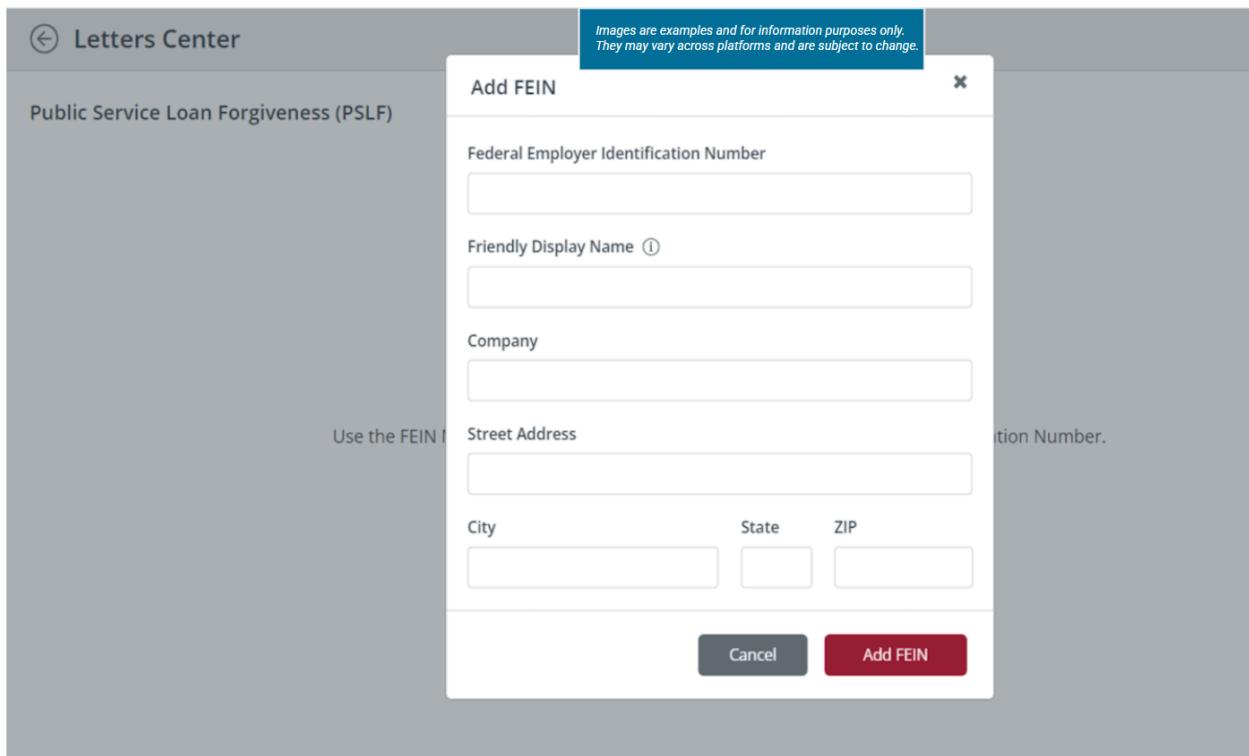
3. In the Public Service Loan Forgiveness container, click **Add FEIN**.



4. You will then be prompted to fill out the Add FEIN form. Enter the FEIN, Friendly Display Name, Company name, and Company address.

Note: The Friendly Display Name is a nickname that helps employees identify the correct FEIN that should appear on their PSLF form.

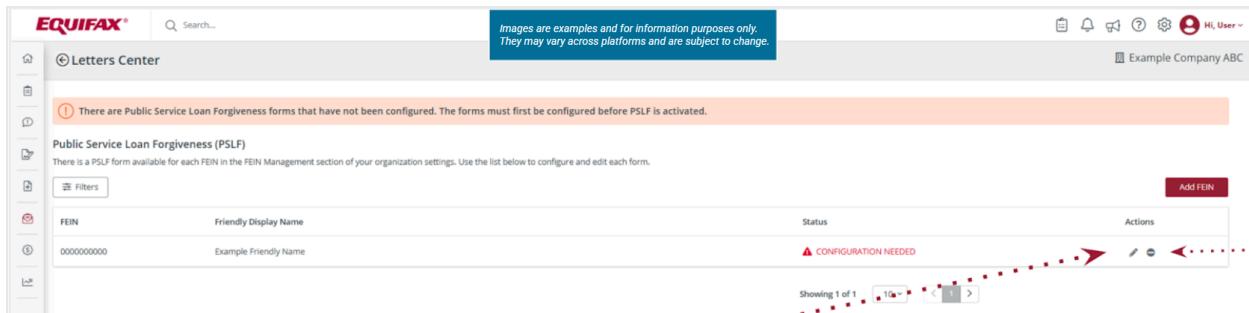
5. Once you've added all requested information, click **Add FEIN**.



Once the FEIN is added, you will see the FEIN appear on the Letter Center's FEIN list. Before the form can be published, you must configure the specific FEIN.

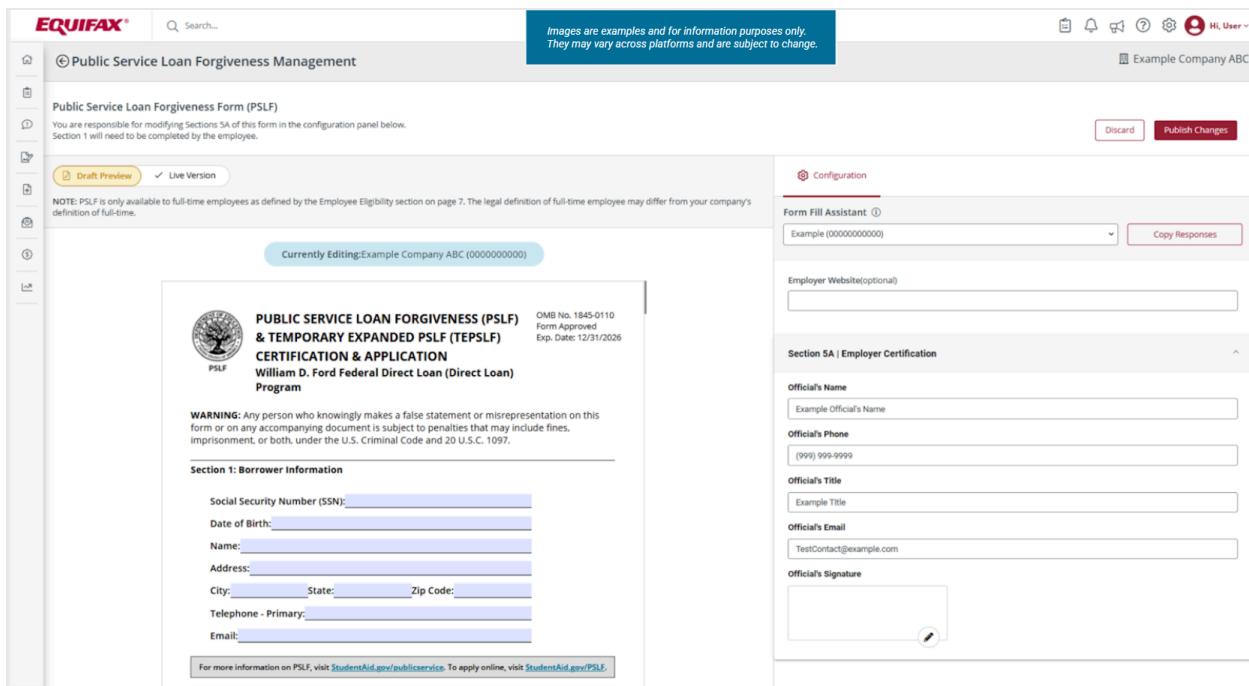
Configuring FEINs

1. To configure the FEIN, click the **pencil** icon to the right of the FEIN.



The screenshot shows the EQUIFAX FEIN Management interface. At the top, there is a search bar and a message: "Images are examples and for information purposes only. They may vary across platforms and are subject to change." On the right, there are user navigation icons and a message: "Hi, User Example Company ABC". Below the header, there is a banner stating: "There are Public Service Loan Forgiveness forms that have not been configured. The forms must first be configured before PSLF is activated." The main content area is a table with columns: FEIN, Friendly Display Name, Status, and Actions. A single row is visible: "0000000000" and "Example Friendly Name". The "Actions" column for this row contains a red triangle icon with the text "CONFIGURATION NEEDED". At the bottom of the table, there is a pagination message: "Showing 1 of 1" and a set of navigation arrows.

2. Within the form, HR Admin users have the option to use the **Form Fill Assistant** to copy responses from another PSLF form or complete the form information manually, and include an optional employer website.
3. Complete **Section 5A Employer Certification** and upload a signature.
4. Click **Publish Changes** in the top right of the form.



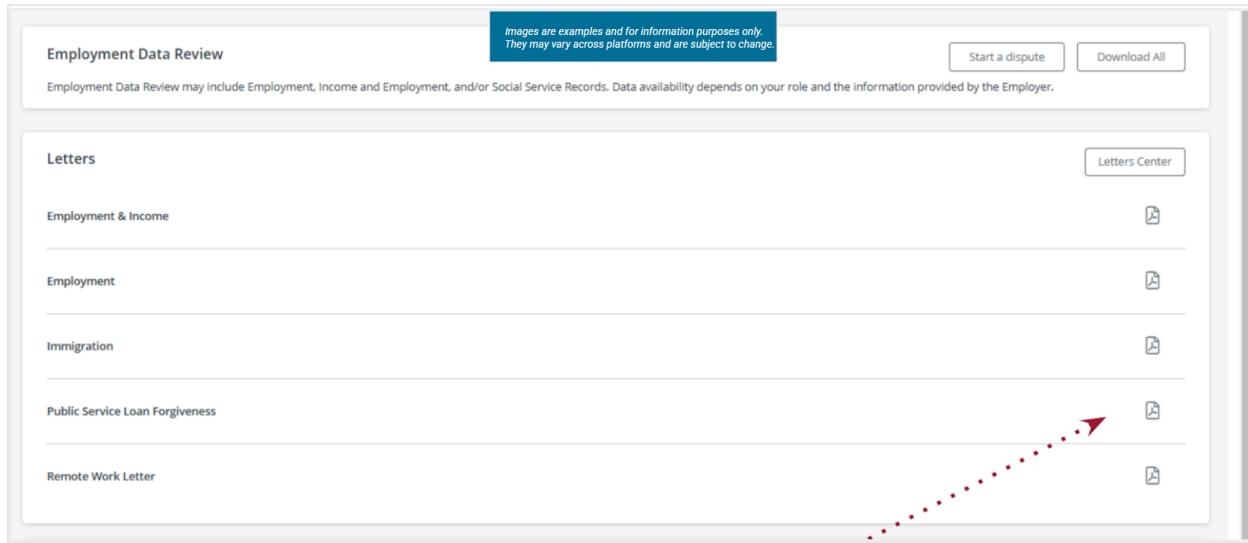
The screenshot shows the Public Service Loan Forgiveness Form (PSLF) configuration interface. The left side displays the form fields, including the title "PUBLIC SERVICE LOAN FORGIVENESS (PSLF) & TEMPORARY EXPANDED PSLF (TEPSLF) CERTIFICATION & APPLICATION" and "William D. Ford Federal Direct Loan (Direct Loan) Program". It also includes a "WARNING" section about false statements and penalties. The right side shows the "Configuration" panel with sections for "Form Fill Assistant" (which includes a dropdown for "Example (0000000000)" and a "Copy Responses" button) and "Section 5A | Employer Certification" (which includes fields for "Official's Name", "Official's Phone", "Official's Title", "Official's Email", and "Official's Signature").

Publishing the changes allows the form to be accessible for your employees.

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Additional Information

Similar to other letters, an HR Admin or User can download a PSLF letter for an employee within the **Employee Profile**.



Employment Data Review

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Start a dispute Download All

Employment Data Review may include Employment, Income and Employment, and/or Social Service Records. Data availability depends on your role and the information provided by the Employer.

Letters

Letters Center

Employment & Income

Employment

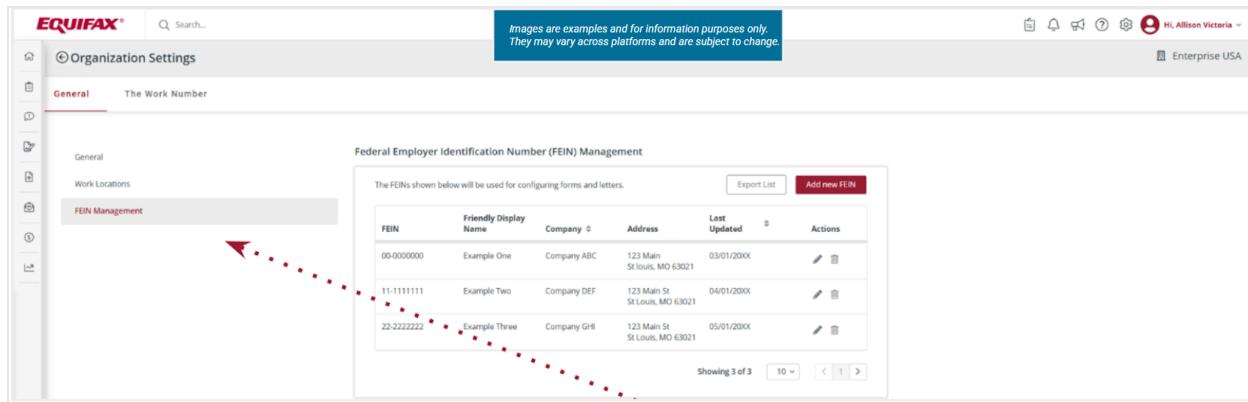
Immigration

Public Service Loan Forgiveness

Remote Work Letter

FEINs can also be created in the FEIN Management page under **Organization Settings**.

Note: Organization Settings is the only page where a FEIN can be edited or deleted.



EQUIFAX® Search...

Organization Settings

General The Work Number

FEIN Management

Federal Employer Identification Number (FEIN) Management

The FEINs shown below will be used for configuring forms and letters.

Export List Add new FEIN

FEIN	Friendly Display Name	Company	Address	Last Updated	Actions
00-000000	Example One	Company ABC	123 Main St Louis, MO 63021	03/01/20XX	
11-111111	Example Two	Company DEF	123 Main St Louis, MO 63021	04/01/20XX	
22-222222	Example Three	Company GHI	123 Main St Louis, MO 63021	05/01/20XX	

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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.