Client Training HQ

Troubleshooting and FAQs for the Power of Attorney Manager

This document is intended to provide answers to frequently asked questions regarding the Power of Attorney Manager.

What is the Power of Attorney Manager?

The Power of Attorney Manager is a centralized platform designed to help simplify and accelerate the Power of Attorney process. This application modernizes the Power of Attorney experience with greater visibility, control, and speed.

Why is Power of Attorney completion important?

The Power of Attorney (POA) document allows Equifax® the ability to support and sometimes act on behalf of a customer's organization, such as communicating with state agencies, responding to claims, decisions, and hearings, as well as potentially receiving unemployment tax-related documents. By designating Equifax as your POA, you can help simplify your unemployment process by ensuring your unemployment-related documents are received at our mail centers, which allows your UC Service Team to more quickly help you manage your unemployment matters and help streamline interactions with state agencies.

How do I get access to the Power of Attorney Manager?

In order to gain access to the Power of Attorney Manager, please reach out to your Account Executive or UC Service Team to request implementation. The Power of Attorney Manager is housed within the Employer Portal.

Do I need credentials to access the Power of Attorney Manager?

Yes, to log into the Power of Attorney Manager, you will need a username and PIN. This will be the same username and PIN that you use to access any other unemployment claims applications on the Employer Portal, such as CaseBuilder or the Reports Application.

What is the website to access the Power of Attorney Manager?

You can access the Power of Attorney Manager at any time by visiting www.ucm.workforce.equifax.com.

I have not received my PIN to register for the Power of Attorney Manager. What should I do now?

In many cases, if you are not receiving an email from Equifax regarding your PIN to login, please check your SPAM or Junk folders. Your internal IT team might also need to whitelist noreply@equifax.com to begin receiving emails from Equifax. If you still cannot locate your PIN, contact your UC Service Team for a manual PIN reset.

What is the difference between a Standard User and a Super User?

Your Account Executive will set up Contract Officers and Legal Entity Officers automatically as **Standard Users** unless otherwise specified. Standard Users are your daily users who will receive the automated email notifications alerting them of POAs to be completed.

Super Users have full access to the Power of Attorney Manager to view, delegate, and complete POAs; however, they do not receive the automated email notifications.

How do I add, remove, or update users?

Simply reach out to your Account Executive to request the change. Please provide the name and email address of the person or persons you are wishing to add or remove.

Is there a limit of how many users we can have who have access to the Power of Attorney Manager?

No, there is no limit. However, as a best practice, it is recommended that a small internal team has access to the application, and then delegates the POAs as needed to members of your organization to complete the required POAs.

How will I be notified that a new Power of Attorney document has been generated and requires attention?

An email notification will be sent to the Power of Attorney contact(s) listed for your organization when a new POA document has been created and requires completion. The email notification will include a link to log into the platform.

Will I receive reminders to complete pending POAs?

Yes, after a Power of Attorney has been within the application for a week, you will receive a daily reminder email to complete the document until the document is completed, deleted, or canceled.

Do POAs expire when created through the Power of Attorney Manager?

Yes, POAs that require attention will expire 180 days after the generation date. The expired POA will automatically be removed from the dashboard.

Do POAs acknowledged by the state(s) expire?

No. However, sometimes, based on Third Party Administrator (TPA) changes at the state level, your organization might be required to resubmit a POA to the state for Equifax to continue to be your TPA.

Will the Power of Attorney Manager or the state notify me once Equifax is no longer the TPA?

No. In most cases, Equifax will not have a way of knowing we are no longer your TPA at the state level until the state begins sending documents directly to you. If you begin to receive unemployment-related materials directly from the state, please contact your Account Executive or UC Service Team so they can investigate and determine if a new POA document is needed.

Will I be notified once a POA is fully processed and acknowledged by the state?

No, currently you will not receive information from the state that Equifax is recognized as your TPA. The completed POA, however, will appear under the Completed POA section of the application upon being processed by the Equifax POA Support Team.

How is the Power of Attorney Manager dashboard organized?

The Needs Attention dashboard which defaults to grouping by Legal Entity (FEIN). This allows organizations to prioritize tasks by specific subsidiaries or high-headcount entities that are needing attention.

The Power of Attorney Manager also provides an All Accounts dashboard to view State Account Numbers and POA statuses across all legal entities that are accessible to the user. Users can take direct action on various tasks, such as generating a new POA, reporting an inactive State Account Number (SAN), or viewing a PDF of a submitted POA, designed to allow for near real-time account management,

Does the Power of Attorney Manager help track the process of each document?

Yes. The Power of Attorney Manager will display the status of each POA document so you are able to easily identify when it's been completed or what various stages of completion the document is in.

What do the different statuses on the dashboard mean?

- **New:** The POAs within this status are newly generated and need attention.
- **Needs Revision:** POAs here were regenerated by your Equifax POA Support Team after an error was noted.
- **Waiting on Delegate:** POAs appear here after being delegated to alternative signers.
- **Ready for Next Step:** Many POAs require multiple steps. Once a step is completed, the POA will appear in this status to signal the next step in the completion process is ready.
- **Processing:** The Equifax system is processing the POA. This is a very brief step and the POA will automatically be moved to the next status when complete.
- **Waiting for Documents:** POAs here were rejected by you within Adobe Sign through the Accept/Reject button. Your POA Support Team will regenerate the POA with correct information.

What are the signature types accepted by the state(s)?

- **E–Sign or Electronic Signature:** States with this requirement allow companies to complete POAs via electronic signatures. You will be able to e-sign your POAs within the Power of Attorney Manager by using Adobe Sign.
- **Wet Ink Signatures:** Also known as "original" signatures, states with this requirement require you to physically sign the POA document(s). Your signer must review the POA for

accurate information, download the POA, have the signer physically sign the document, and then the document must be uploaded back into the Power of Attorney Manager.

- **Online Enrollment:** Some states require organizations to visit their state websites to complete the Third Party Administrator process.

My notary can only notarize a physical document. Can I delegate a POA to them to notarize electronically instead?

No. Unfortunately at this time, notaries must notarize physical documents, meaning you will need to print the document, have it notarized, and then upload the completed document into the Power of Attorney Manager.

What should I do if I notice there is incorrect information on a POA that needs to be signed?

When reviewing a POA for accurate information, if you notice incorrect information, such as the wrong data, spelling, address, etc., on the document, click Reject at the top of the POA and leave a note for your POA Support Team with the correct information to be updated. After rejecting a POA, the document will appear in the Waiting for Documents status until the document is regenerated by your POA Support Team.

Can a Power of Attorney document be forwarded to an alternative contact for completion?

Yes. The Power of Attorney Manager allows for delegation with limited manual effort. You may delegate one or multiple POAs to another/alternate signer. Delegates will receive an email notification of new requests, in addition to email reminders of the POA(s) needing to be completed.

Does the person I delegate a POA to need a Power of Attorney Manager account?

No. Simply enter the person's name and email address after selecting the Delegate button. The person you delegate POAs to will receive a one-time passcode in order to complete the delegated POA(s).

Can I delegate multiple POAs at once?

Yes. You can mass-delegate POAs if they are all going to the same signer by selecting Delegate State Forms in the upper right corner. From there, choose "Select All" or individually click the boxes next to the POAs you want to delegate.

Is there information I can share with my alternative signer so they know what to expect with the delegation process?

Yes. Please share our Power of Attorney Manager Delegation document with anyone in your organization who would like additional information on the delegation process.

After I delegate a POA, can I still see that POA?

Yes. Delegating a POA does not remove your access to that document, it simply adds more signers, meaning you will still see that POA on your entity dashboard until completed. All signers will receive automated reminder email notifications, if applicable, to ensure the document is completed in a timely manner.

What happens if I send the POA to the wrong signer?

You will need to delegate the POA to the appropriate signer through the application. At the present time, you cannot remove someone who has been delegated a POA; however, you may tell the person who received the incorrect delegation to ignore the email.

Can I view the history of a POA, such as who has worked on it and when it was delegated?

Yes. When viewing a legal entity, you can view the history of the individual POA(s) by selecting the Status History icon under the Actions column.

Can I resend a delegated POA to someone rather than them receiving a reminder email?

No. Currently, you can only delegate a POA to a person once, so they will receive reminder emails. You can, however, delegate the POA to a different individual, but you cannot delegate the same POA to someone twice.

The person I delegated the POA to never received an email. How do I make sure they receive the delegation email?

If your delegate does not receive the notification email, have them check their SPAM or Junk folder. If this does not work, please have them whitelist noreply@equifax.com.

Can I view completed POAs for my organization?

Yes. On the left navigation menu, select Completed POA to search for completed documents by FEIN. After selecting a FEIN, you can then drill down by state. From the Completed POA screen, you can download completed documents as needed.

I'm supposed to have access to the Power of Attorney Manager, but I do not see the tile on my Employer Portal. What should I do?

If you do not see the tile after logging into the Employer Portal, please contact your Account Executive. Your account might need to be reconfigured or POAs generated for your organization have expired.

Is there a recommended browser to use when accessing the Power of Attorney Manager?

Yes. It is recommended that you use Google Chrome for the best user experience.

When I log into the Power of Attorney Manager, my dashboard is blank even though my UC Service Team noted I have pending POAs. What should I do?

If you do not see any POAs to be completed on your dashboard, please log out and try to login again. Many times, if your dashboard is blank, you might have logged in with the wrong user account. After logging in a second time, and you still have a blank dashboard, please contact your Account Executive or UC Service Team.

What should I do if I get an error screen or an infinite loading screen when attempting to login?

After confirming the correct email address is being used at login, please clear your browsing data, cookies, and cache. Note that your email must be an official work email, as personal email domains, such as Gmail, are blocked. If you have tried to login after clearing your cookies and cache, please alert your Account Executive, who will then check with the Equifax Tech Team regarding a possible outage.

I keep trying to upload a completed document, but it is stuck in the "processing" icon. How should I proceed?

Refresh your screen to attempt to manually move the POA along. If the status still remains as Processing, please alert your UC Service Team. You may also forward the completed POA document to them to upload internally.

What do I do if I need help or have questions regarding the Power of Attorney Manager?

At the bottom of the Power of Attorney Manager dashboard is the contact information for your Power of Attorney Specialist. Or, contact unemploymentserviceteam@equifax.com at any time.

How can I access Power of Attorney Manager training?

Visit Connections for access to free training materials, such as guides on using the application, watch On Demand training videos, register to attend a live webinar, or view other unemployment cost management resources.

How can I mark an action as inactive if there we are no longer reporting wages under that account?

Under the Actions column in the All Accounts dashboard, click on the slash zero or null sign (circle with line through) which will prompt a confirmation pop-up to confirm you wish to mark the state account as inactive. Once marked as inactive, that account will no longer be used for payroll tax filings in that state.

What if we need to request/generate a new POA for a state account?

Generate a new POA for a state account through the All Accounts dashboard by clicking the icon with the plus sign for a state account with the status of Not Started. The user will be prompted to select either Full-Service or Claims-Only, if the state allows. Make the selection and click Generate New Power of Attorney.

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.