

Client Training HQ

UCM Training Resources

Connections and Knowledge Base Tools

Connections: Links to Unemployment Cost Management Training Resources

Our Connections site provides training resources for several different topics pertaining to the unemployment cost management platforms. Below is a list of available resources and a brief description of the topics covered.

Connections and UCM Resources	
Connections	The main welcome page with a holistic view of resources for all Equifax solutions, including links to upcoming webinars and thought leadership events. Use the Solutions drop-down menu to navigate to all products.
UCM Main Page	The home page for Unemployment Cost Management contains all of our current training tools and resources for the UCM applications, with all materials updated and maintained regularly.

Live Monthly Webinars: *These sessions are led by our expert Product Trainers and include a Q&A session at the end of each presentation. The links provided will take you to the registration page for each webinar with all upcoming sessions posted.*

Introduction to Power of Attorney Manager	Covers power of attorney basics and the Power of Attorney Manager application, which is the centralized platform designed to help simplify and accelerate the Power of Attorney process.
Introduction to CaseBuilder	Provides an overview of CaseBuilder, the one-stop platform that allows you to manage your unemployment program by responding to claims, decisions, and hearings.
General Unemployment Overview	This session provides an introduction to general unemployment cost management, which includes the history of UC, the life of an unemployment claim, and covers documentation best practices.
Introduction to Reports	This session introduces our UC Report application, a simple way to access your unemployment program data by running a variety of reports available.

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

CaseBuilder Support Guides: *Interactive guides providing a step-by-step overview of UCM topics and functionality within CaseBuilder.*

CaseBuilder Support Guide	Navigate and learn to use CaseBuilder at your own pace. Provides information on various features and functions within the application, including how to respond to claims, decisions, and hearings.
CaseBuilder User Roles Support Guide	This support guide explains the different CaseBuilder user roles and their capabilities to help you decide the roles for your internal team responsible for your unemployment claims.
How to Use and Navigate CaseLink	CaseLink is a feature that allows you to delegate claims, decisions, or hearings to another user/person within your organization. Follow these steps to log into CaseLink, view the claim moving through CaseLink and how you will interact with the claim throughout the process.

Power of Attorney Manager Support Guide and Documents: *An interactive guide providing a step-by-step overview of the functionality within POA Manager. Documents share high-level overviews of features within the POA Manager.*

Power of Attorney Manager Support Guide	This support guide is designed to help you navigate and use the application, Power of Attorney Manager, to complete and submit the POAs needed for your organization.
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.
Power of Attorney Manager Delegation Process	The purpose of this document is to provide instructions on completing a delegated Power of Attorney through the Power of Attorney Manager by Equifax®.

Unemployment Support Guides: *Interactive guides covering a variety of UCM topics to help manage your unemployment claims.*

Unemployment Support Guide	This support guide provides details about the unemployment claim process, best practices, and how to use our applications.
UC Separations Support Guides	Highlights best practices for making checklists for various types of separations, as well as information on the documentation needed for each, to best support your case.
Hearings Support Guide	Prep for any upcoming hearing: this guide will help you learn more about the hearing process, best practices, how to find and prepare key-witnesses, what to expect for the day of, and more!

Videos: <i>On-demand webinars available whenever works best for you!</i>	
Introduction to CaseBuilder	On-demand version of our monthly live webinar
Introduction to Power of Attorney Manager	On-demand version of our monthly live webinar
Introduction to Reports	On-demand version of our monthly live webinar
General Unemployment Overview	On-demand version of our monthly live webinar
Setting Yourself Up to Win the Claim Before It's Filed	Review best practices for employment and separation actions. Also, learn about documentation and how it could impact how UC claims are handled.
Life of a Claim and Determining Liability	This video walks through the life of a claim, including how a claim is established and how the state verifies eligibility and determines benefits.
The Power of Understanding Hearings: How to Make a Difference	This video provides what an unemployment hearing is, why you are asked to participate, why you should attend, details to gather for the hearing, tips for testifying, and claimant and closing statements.

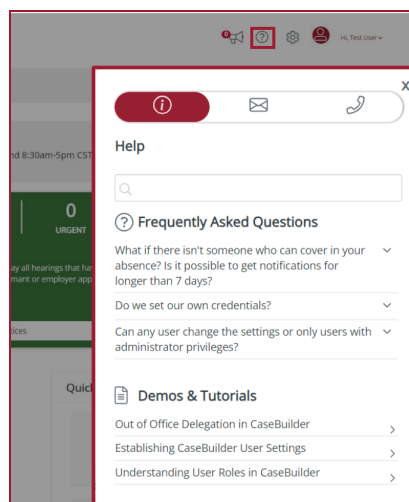
Documents: <i>High-level overviews providing a quick learning tool on various UCM topics.</i>	
Lessening Unemployment Impact	This document is intended to provide possible strategies to help better lessen costs of unemployment claims.
Offboarding Best Practices	This document provides best practices for offboarding employees from your organization.
Documentation Best Practices	This document describes the importance of documentation, as well as best practices for documentation based on whether the claimant was discharged or quit.
UC Claims Flowchart	This flow chart shows the stages of a Life of a Claim and how Equifax can potentially help assist in the claims process.

UCM Applications: Knowledge Base Resources

Helpful resources are always accessible within the UCM platforms. Click the **question mark icon** in the upper right corner of the screen in any of the UCM applications.

This in-app **Knowledge Base** allows you to continue working within the application while getting answers to your unemployment questions.

Note: The image to the right is an example of the Knowledge Base within CaseBuilder.



Custom Training Options

Equifax provides customized, branded training to fit your organization's specific needs. This helps your team save time and reduce risk, even with changes in staff or team turnover. Your Account Executive can engage the Client Training HQ team to discuss what options would be the best fit for your organization, including:

- Interactive user guides
- On-demand videos
- Job aids
- Custom live training

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.