

# Client Training HQ

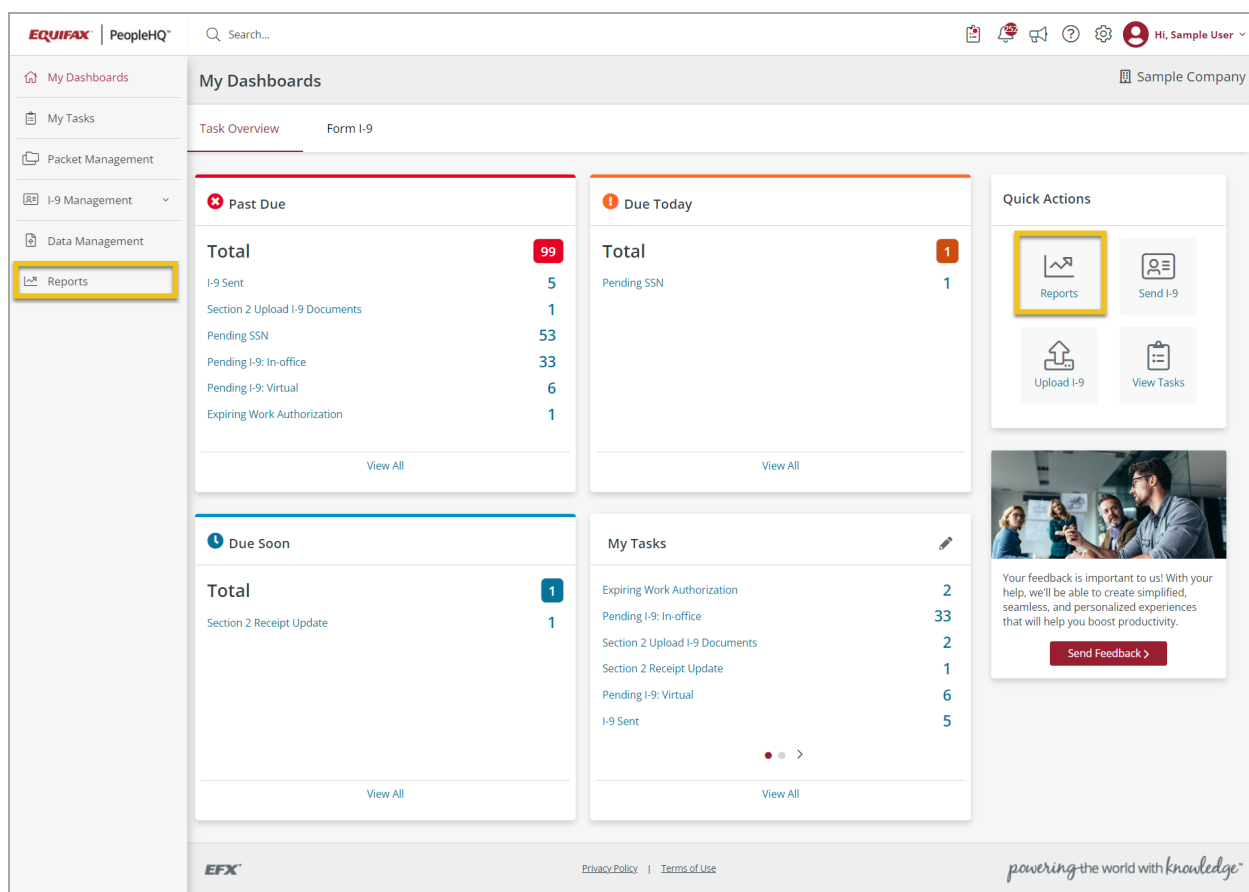
## I-9 HQ™ Reports Guide

### Overview

I-9 HQ™ offers a suite of reports with a range of different reporting options. Reports are available to users whose role includes report access, and will only contain data from locations the user is assigned to. Some reports are only available to employers who subscribe to The Work Number®, the Equifax® employment verification service.

### Accessing Reports

To access reports, click **Reports** in the left navigation menu or the Reports Quick Actions tile.

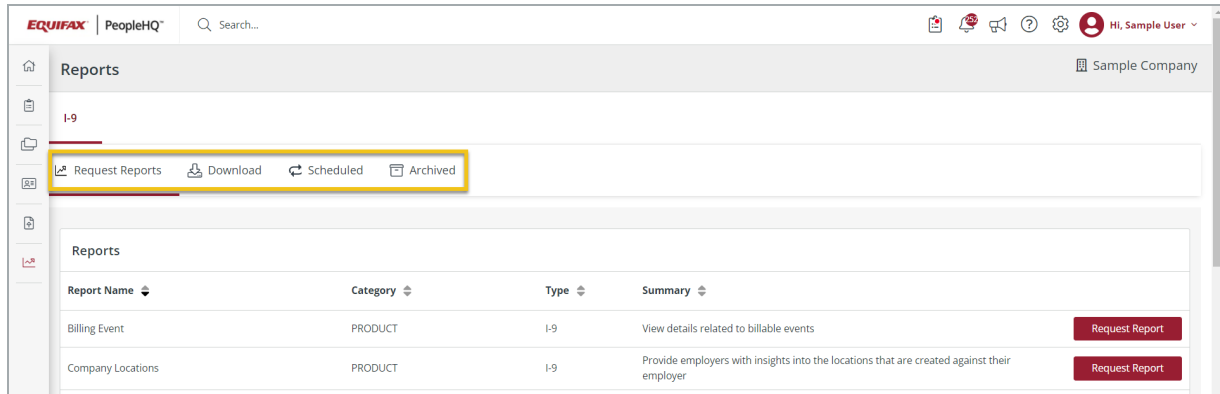


The screenshot displays the Equifax PeopleHQ dashboard. On the left, the navigation menu includes 'My Dashboards', 'My Tasks', 'Packet Management', 'I-9 Management', 'Data Management', and 'Reports' (highlighted with a yellow box). The main content area is titled 'My Dashboards' and shows a 'Task Overview' for 'Form I-9'. It features four summary tiles: 'Past Due' (Total: 99), 'Due Today' (Total: 1), 'Due Soon' (Total: 1), and 'My Tasks' (Total: 23). The 'Past Due' tile lists: I-9 Sent (5), Section 2 Upload I-9 Documents (1), Pending SSN (53), Pending I-9: In-office (33), Pending I-9: Virtual (6), and Expiring Work Authorization (1). The 'Due Today' tile lists: Pending SSN (1). The 'Due Soon' tile lists: Section 2 Receipt Update (1). The 'My Tasks' tile lists: Expiring Work Authorization (2), Pending I-9: In-office (33), Section 2 Upload I-9 Documents (2), Section 2 Receipt Update (1), Pending I-9: Virtual (6), and I-9 Sent (5). On the right, the 'Quick Actions' section includes 'Reports' (highlighted with a yellow box), 'Send I-9', 'Upload I-9', and 'View Tasks'. Below this is a feedback section with the text: 'Your feedback is important to us! With your help, we'll be able to create simplified, seamless, and personalized experiences that will help you boost productivity.' and a 'Send Feedback' button. The footer includes the Equifax logo, 'Privacy Policy | Terms of Use', and the tagline 'powering the world with knowledge'.

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

## Reports Page

There are navigation headers located at the top of the Reports page, each of which will route to different reporting options; Request Reports, Download, Scheduled, and Archived. Select the desired report by clicking the **Request Report** button.



## Request Reports Tab

Each report may be requested as a One Time Only report or scheduled as a Recurring report.

### Request a One Time Only Report

One Time Only reports are initiated at the point of request. Review parameters displayed such as Date Range, Locations, or I-9 Status. The report request is complete and will be available to download after processing.



Once the chosen parameters are set, click the **Run Report** button.



## Schedule a Recurring Report

To schedule a recurring report, click the **Recurring** button. Review and select the parameters to set the schedule such as future date and how often, data to include, and an end date. The report will be available to download after processing per the schedule.

**Reports**

1-9

Request Reports Download Scheduled Archived

**Configure Report** | Company Usage

**Report Schedule**  
How often will this report be generated?

One Time Only **Recurring**

Frequency: Daily  
Repeats: Every 1 Day(s)

## Report Date Filters and End-Date

Dates can be provided to filter reports by hire or rehire date, the number of previous days to include in the report each time it is generated, and whether the report is year-to-date or another custom starting date. An end-date is also able to be defined for the report.

**Configure Report** | Company Usage

**Report Schedule**  
How often will this report be generated?

One Time Only **Recurring**

Frequency: Daily  
Repeats: Every 1 Day(s)

**Date Filters**  
Provide the dates that will be used to filter your report data

Filter By: Hire / Rehire Date

Every time this report is generated, include...

☒ The Previous  
1 Day(s)

☐ Year To Date

☐ Custom Starting Date

**End-Date**  
Do you wish to set an end-date for this recurring report?

Ends: ☒ Never ☐ Choose a date

**Included Data**  
What do you want included in this report?

Locations: All My Locations

I-9 Status: Section 1 Complete, Section 2 Complete, Supplement B Complete

Employment Status: Active

Cancel Save Schedule

## Download Options

A few reports will have various download options which will include whether to include a PDF of the Form I-9 or any supporting documents or additional attachments.

The screenshot shows the 'I-9' report configuration interface. At the top, there are tabs for 'Request Reports', 'Download', 'Scheduled', and 'Archived'. Below this is the 'Configure Report' section for 'Company Usage'. The 'Report Schedule' section has buttons for 'One-Time Only' and 'Recurring'. The 'Run' section has a 'Now' button. The 'Date Filters' section includes a 'Filter By' dropdown (set to 'Hire / Rehire Date') and a 'Date Range' (08/12/2024 to 10/11/2024). The 'Included Data' section has a 'Locations' dropdown (set to 'All My Locations') and an 'Employment Status' dropdown (set to 'Active'). The 'Download Options' section is highlighted with a yellow box and an arrow, showing two checkboxes: 'Form I-9 PDF's' and 'Supporting documents and additional attachments'. Below this, it states 'Based on the options provided, we'll package this report as a .xls file'.

## Included Data

The Included Data section allows Location, I-9 Status, and Employment Status data to include in the report.

The screenshot shows the 'I-9' report configuration interface. At the top, there are tabs for 'Request Reports', 'Download', 'Scheduled', and 'Archived'. Below this is the 'Configure Report' section for 'Company Usage'. The 'Report Schedule' section has buttons for 'One-Time Only' and 'Recurring'. The 'Frequency' section has a 'Daily' dropdown. The 'Repeats' section has 'Every' and '1' dropdowns, followed by 'Day(s)'. The 'Date Filters' section includes a 'Filter By' dropdown (set to 'Hire / Rehire Date') and a 'Date Range' (08/12/2024 to 10/11/2024). The 'Included Data' section is highlighted with a yellow box and arrows, showing three dropdowns: 'Locations' (set to 'All My Locations'), 'I-9 Status' (set to 'Section 1 Complete, Section 2 Complete, Supplement B Complete'), and 'Employment Status' (set to 'Active'). The 'End-Date' section has a 'Do you wish to set an end-date for this recurring report?' dropdown (set to 'Never') and a 'Choose a date' dropdown (set to 'mm/dd/yyyy'). At the bottom, there are 'Cancel' and 'Save Schedule' buttons.

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### Included Data - Locations

Click the plus (+) and select the checkboxes for each location to be included in the report.

The screenshot shows the 'Included Data' form with the question 'What do you want included in this report?'. The 'Locations' section is highlighted with a yellow box. It contains a search bar, a 'Clear Selections' button, and a list of locations with checkboxes: 'Default', 'E-Verify Location', 'Location 1', and 'Location 2'. A yellow arrow points to the plus (+) button in the top right corner of the 'Locations' section.

### Included Data - I-9 Status

Access the drop-down to select if the report data will include completed Section 1, Section 2, or Supplement B.

The screenshot shows the 'Included Data' form with the question 'What do you want included in this report?'. The 'I-9 Status' section is highlighted with a yellow box. It contains a drop-down menu with the text 'Section 1 Complete, Section 2 Complete, Supplement B Complete'. A yellow arrow points to the drop-down arrow in the top right corner of the 'I-9 Status' section.

### Included Data - Employment Status

Access the drop-down to select if the report will include Active, Inactive, or Pending Employment data.

The screenshot shows the 'Included Data' form with the question 'What do you want included in this report?'. The 'Employment Status' section is highlighted with a yellow box. It contains a drop-down menu with the text 'Active'. A yellow arrow points to the drop-down arrow in the top right corner of the 'Employment Status' section.

Once all selections have been completed on the Request Reports tab for recurring reports, click the **Save Schedule** button to save the selections.



## Download Tab

The **Download** tab will provide the list of the reports that are ready to be downloaded directly from the system. Once a report is run, In Progress will show on the status column on the right until the report is completed. Once it is ready for downloading, the Download button will appear.

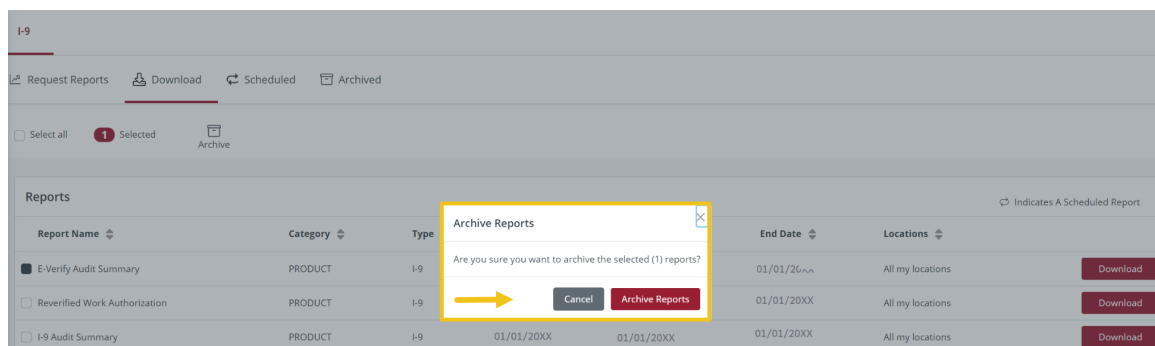
| Reports                                                |          |      |            |            |            |                  |             |
|--------------------------------------------------------|----------|------|------------|------------|------------|------------------|-------------|
| I-9                                                    |          |      |            |            |            |                  |             |
| Request Reports Download Scheduled Archived            |          |      |            |            |            |                  |             |
| Select all 0 Selected Archive                          |          |      |            |            |            |                  |             |
| Reports <span>↻ Indicates A Scheduled Report</span>    |          |      |            |            |            |                  |             |
| Report Name                                            | Category | Type | Run Date   | Start Date | End Date   | Locations        |             |
| E-Verify Audit Summary                                 | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | In progress |
| <input type="checkbox"/> Reverified Work Authorization | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download    |
| <input type="checkbox"/> I-9 Audit Summary             | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download    |
| <input type="checkbox"/> E-Verify Pending Case Summary | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download    |
| <input type="checkbox"/> Missing I-9                   | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download    |
| <input type="checkbox"/> Form I-9 Status               | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download    |

## Archiving Reports

From the **Download** tab, select the report to be archived and click the **Archive** icon. Multiple reports can be selected to archive at one time.

| I-9                                                        |          |      |            |            |            |                  |          |
|------------------------------------------------------------|----------|------|------------|------------|------------|------------------|----------|
| Request Reports Download Scheduled Archived                |          |      |            |            |            |                  |          |
| Select all 1 Selected Archive                              |          |      |            |            |            |                  |          |
| Reports <span>↻ Indicates A Scheduled Report</span>        |          |      |            |            |            |                  |          |
| Report Name                                                | Category | Type | Run Date   | Start Date | End Date   | Locations        |          |
| <input checked="" type="checkbox"/> E-Verify Audit Summary | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download |
| <input type="checkbox"/> Reverified Work Authorization     | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download |
| <input type="checkbox"/> I-9 Audit Summary                 | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download |
| <input type="checkbox"/> E-Verify Pending Case Summary     | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 12/31/20XX | All my locations | Download |

Once the Archive icon is clicked, an alert will appear to confirm the archive action. Click the **Archive Reports** button to proceed, or the **(Cancel** button to exit the action).



## Scheduled Tab

The **Scheduled** tab provides a list of scheduled recurring reports. The headers on this menu represent the report parameters chosen at the time the report was run. There is also an option to edit or delete the report.

**Note:** Reports deleted from the Scheduled tab cannot be recovered.

Reports

I-9

Request Reports

Download

Scheduled

Archived

Scheduled Reports

| Report Name            | Category | Type | Frequency            | Parameters     | End Date   | Locations        |
|------------------------|----------|------|----------------------|----------------|------------|------------------|
| E-Verify Audit Summary | PRODUCT  | I-9  | Weekly on the Monday | Previous 1 day | 01/01/20XX | All my locations |

## Archived Tab

The **Archived** tab will show all of the reports that the user elected to archive from the Download tab. If users wish to restore a report in the future, they can select the **Restore** button and the report will move to the Download tab. All archived reports will remain in the Archived page for future use.

Reports

I-9

Request Reports

Download

Scheduled

Archived

Archived Reports

Indicates A Scheduled Report

| Report Name            | Category | Type | Run Date   | Start Date | End Date   | Archived Date | Locations        |
|------------------------|----------|------|------------|------------|------------|---------------|------------------|
| E-Verify Audit Summary | PRODUCT  | I-9  | 01/01/20XX | 01/01/20XX | 01/01/20XX | 01/01/20XX    | All my locations |

Restore

## Report Delivery Methods

There are two ways to obtain Reports from the system:

1. Manually download the file directly from the user interface.
2. Use the SFTP method to export the report directly to the established SFTP account.

Additional setup is required for this feature to be enabled.

## Available Standard Reports and Parameters

Every report comes with different data configuration options. Each individual filter will be presented for each report below.

| Billing Event Report                                                                                 |                                                                                                      |                                                                                          |                                                                                                                |
|------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Filters: One Time Only</b> > Date Filters<br><b>Recurring</b> > Frequency, Date Filters, End-Date |                                                                                                      |                                                                                          |                                                                                                                |
| Billable event details. <ul style="list-style-type: none"><li>• Event ID</li><li>• Product</li></ul> | <ul style="list-style-type: none"><li>• Employer</li><li>• Event</li><li>• Line of Service</li></ul> | <ul style="list-style-type: none"><li>• Event Description</li><li>• Event Time</li></ul> | <ul style="list-style-type: none"><li>• First Name</li><li>• Last Name</li><li>• SSN (Last 4 Digits)</li></ul> |

| Company Locations Report                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Filters: One Time Only</b> > Location Status<br><b>Recurring</b> > Frequency, Date Filters, End-Date, Location Status                                                                                                                                                                                                 |                                                                                                                                                                                                                                                               |
| This report will provide users a list of all locations created under a specific employer. The user can select from generating Active, Inactive or both into the report results. <ul style="list-style-type: none"><li>• Location Code</li><li>• Location Status</li><li>• Location E-Verify Enabled (Yes / No)</li></ul> | <ul style="list-style-type: none"><li>• Location Name</li><li>• Location Address Line1</li><li>• Location Address Line2</li><li>• Location City</li><li>• Location State Code</li><li>• Location Country Code</li><li>• Location Primary (Yes / No)</li></ul> |

| Company Usage Report                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Filters: One Time Only</b> > Date Filters, Locations, I-9 Status, Employment Status<br><b>Recurring</b> > Frequency, Date Filters, End-Date, Locations, I-9 Status, Employment Status                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                 |
| View all company, or specific location(s), I-9s completed during a certain time period. <ul style="list-style-type: none"><li>• Work Location</li><li>• Last Name</li><li>• First Name</li><li>• SSN (Last 4 Digits)</li><li>• Email</li><li>• Hire Rehire Date</li><li>• Reverification Rehire Date</li><li>• Hire Date</li></ul> | <ul style="list-style-type: none"><li>• E-Verify Last Updated Date</li><li>• E-Verify Final Case Status</li><li>• Reverification Due Date</li><li>• Certifier</li><li>• Section 1 Signed</li><li>• Section 2 Signed</li><li>• User Defined Field Name 1</li><li>• User Defined Field Value 1</li><li>• User Defined Field Name 2</li><li>• User Defined Field Value 2</li></ul> |

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|                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Projected Start Date</li> <li>• Termination Date</li> <li>• Completion Method</li> <li>• I-9 Status</li> <li>• E-Verify Case Number</li> <li>• E-Verify Initial Case Status</li> <li>• E-Verify Initial Updated Date</li> </ul> | <ul style="list-style-type: none"> <li>• I-9 Entry Type</li> <li>• Doc List A Title</li> <li>• Doc List B Title</li> <li>• Doc List C Title</li> <li>• Other Doc</li> <li>• Initiated By First Name</li> <li>• Initiated By Last Name</li> <li>• Initiated Date</li> </ul> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Company Usage Summary Report

**Filters: One Time Only** > Date Filters, Locations, I-9 Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, I-9 Status  
 View a summary of all I-9's completed by location and date range.

|                                                                                                                         |                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Location Name</li> <li>• Total Forms</li> <li>• Total - Paper Forms</li> </ul> | <ul style="list-style-type: none"> <li>• Total - Electronic Forms</li> <li>• Total - Remote Transactions</li> <li>• Total - Historical Forms</li> </ul> |
|-------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|

### E-Verify Audit Summary Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, Employment Status

View a summary of all E-Verify cases during a specific timeframe.

|                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• E-Verify Case Creation Date</li> <li>• E-Verify Case Number</li> <li>• Doc List A Title</li> <li>• Doc List B Title</li> <li>• Doc List C Title</li> <li>• Last Name</li> <li>• First Name</li> </ul> | <ul style="list-style-type: none"> <li>• SSN (Last 4 Digits)</li> <li>• Hire/Rehire Date</li> <li>• E-Verify Initial Result</li> <li>• E-Verify Case Closure Date</li> <li>• E-Verify Case Closure Reason</li> <li>• E-Verify Case Closure Code</li> <li>• Current E-Verify Status</li> <li>• E-Verify Case Creator</li> <li>• E-Verify Company ID</li> </ul> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### E-Verify Pending Case Summary Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, Employment Status

View a list of pending E-Verify cases by location.

|                                                                                                                                                          |                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Region Name</li> <li>• Area Name</li> <li>• Location Name</li> <li>• Last Name</li> <li>• First Name</li> </ul> | <ul style="list-style-type: none"> <li>• SSN (Last 4 Digits)</li> <li>• E-Verify Case Status</li> <li>• E-Verify Case Creator</li> <li>• E-Verify Case Creation Date</li> <li>• E-Verify Case Number</li> </ul> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Expiring Work Authorization Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, Employment Status

View employee document expiration and extension details and the number of days until a document is expected to expire.

- Location Name
- Last Name
- First Name
- Employee Client ID
- Client Order ID

- SSN (Last 4 Digits)
- Hire Date Date of Birth
- Age In Days
- Expire Date
- Category Code
- Designated Country
- Section Two Ext Completion Date
- Reverification Ext Completion Date

## Form I-9 Status Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, I-9 Status, Employment Status

View status of employees' I-9s for a certain time period.

- First Name
- Last Name
- Location Name
- SSN (Last 4 Digits)
- Hire Rehire Date
- Reverification Rehire Date
- Hire Date
- Final Response

- Reverification Due Date
- Category Code
- Projected Start Date
- I-9 Status
- Employee Signature Date
- Employer Signature Date
- Reverification Signature Date
- E-Verify Case Number
- Initial Response Date
- Final Response Date

## I-9 Audit Detail Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, I-9 Status, Employment Status

View Form I-9 Audit Trail details for employees.

- SSN (Last 4 Digits)
- Last Name
- First Name
- Middle Initial
- Date of Birth
- Event
- Date

- Source
- Signature Method
- Location Code
- Field Updated
- Before
- After
- Description
- IP Address
- I9 ID

## I-9 Audit Summary Report

**Filters: One Time Only** > Date Filters, Download Options, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, Employment Status

View a Form I-9 Audit Trail Summary for employees. There are more than 240 data points in the I-9 Audit Summary Report. Key fields including, but not limited to: employee details, hire date, Form I-9 details, Section 2 completion method, details of presented documents, and E-Verify results. Internal Notes are visible on this report including note text, author, and creation date.

## Missing I-9 Report

**Filters: One Time Only** > Date Filters, Locations, Status, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, Status, Employment Status

View a list of employees without a Form I-9 on file, based on comparison of payroll transactions.

- Form I-9 Status
- Noncitizen Employees
- Work Location Code
- Work Location Name
- Last Name
- First Name
- Middle Initial
- SSN (Last 4 Digits)
- Immigration Status
- Work Expiration Date
- Hire Rehire Date
- Reverification Rehire Date
- Hire Date
- Projected Start Date
- Current E Verify Status

## Noncitizen Employees Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status  
**Recurring** > Frequency, Date Filters, End-Date, Locations, Employment Status

View all employees whose current Form I-9 indicates the employee's citizenship status is Noncitizen Authorized to Work.

- Work Location Code
- Work Location Name
- Last Name
- First Name
- Middle Initial
- SSN (Last 4 Digits)
- Immigration Status
- Work Expiration Date
- Hire Rehire Date
- Reverification Rehire Date
- Hire Date
- Projected Start Date
- Current E Verify Status

## Purge I-9 Report

**Filters: One Time Only** > Date Filters, Locations  
**Recurring** > Frequency, Date Filters, End-Date, Locations

View all I-9s purged or scheduled for purge during a certain time period.

- Last Name
- First Name
- SSN (Last 4 Digits)
- Work Location
- Hire Date
- Is Rehire
- Termination Date
- Archive Date
- Purge Date

## Remote Hire Report

**Filters: One Time Only** > Date Filters, Locations

**Recurring** > Frequency, Date Filters, End-Date, Locations,  
Appointment Type, Completion Method, Employment Status

View all I-9s completed remotely during a certain date range using either a third party or an employer designated agent. The 45 key data fields include: I-9 Status, Employee and I-9 general information, Reverification Rehire date, and Work Authorization Expiration date.

## Reverified Work Authorization Report

**Filters: One Time Only** > Date Filters, Locations, Employment Status

**Recurring** > Frequency, Date Filters, End-Date, Locations, Employment Status

View all employees who completed Form I-9 reverification, including which document was used.

- Work Location Code
- Work Location Name
- First Name
- Last Name

- Middle Initial
- SSN (Last 4 Digits)
- Reverification Completion Date
- Completer First Name
- Completer Last Name
- Document Presented

## User Report

**Filters: One Time Only** > Date Filters, Locations, User Status

**Recurring** > Frequency, Date Filters, End-Date, Locations, User Status

View insights into users that are created against their employer.

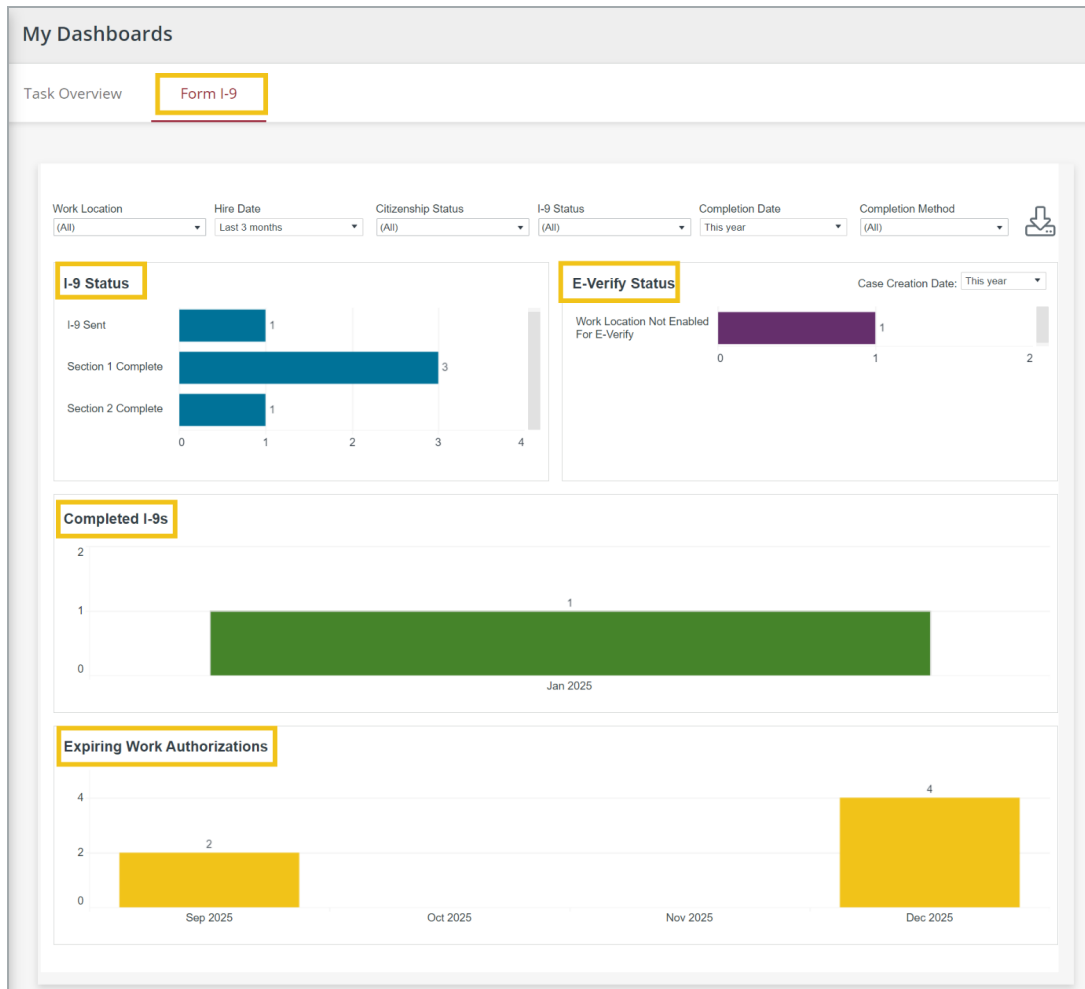
- First Name
- Last Name
- Email
- Job Title

- Roles
- Status
- Locations
- Last Updated
- Last Login

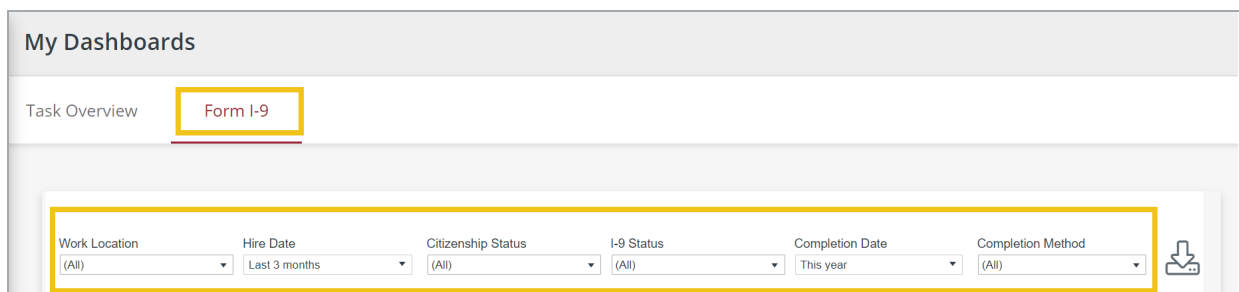
## Form I-9 Tab: Custom Reporting

The **Form I-9 tab** allows users to create custom reports. Records matching default filters show bar graphs displayed: I-9 Status, E-Verify Status, Completed I-9s, and Expiring Work Authorizations.

**Note:** The E-Verify Status tile has an additional filter specific to E-Verify cases within the tile: **Case Creation Date**.

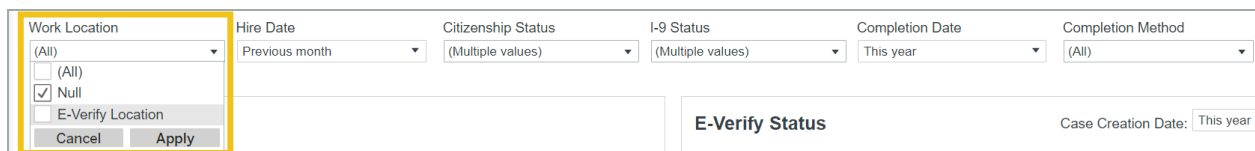


The **Top Menu bar** contains filter drop-down menus including: Work Location, Hire Date, Citizenship Status, I-9 Status, Completion Date, and Completion Method.



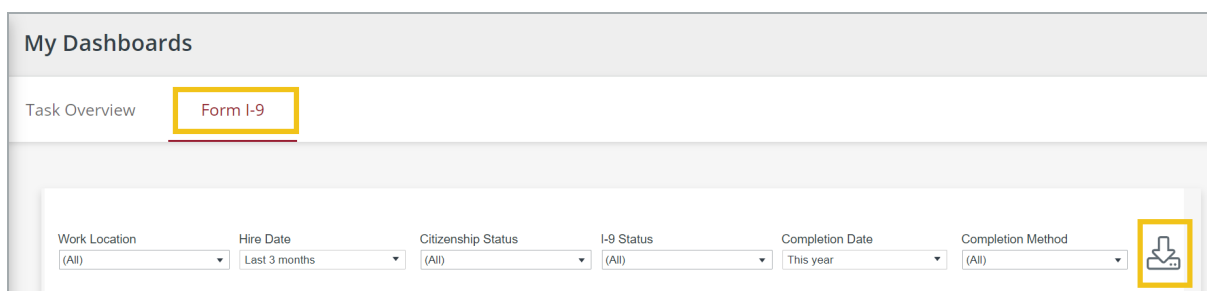
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Each menu item will provide a list of filters. Once filters are chosen outside of the default filters that appear, the user will click the **Apply** button, and the bar graphs will update in real time.



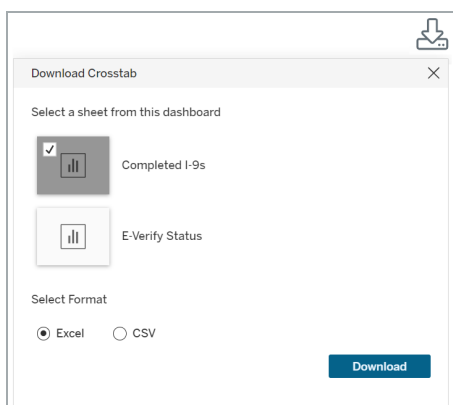
A screenshot of a filter menu. The 'Work Location' dropdown is highlighted with a yellow box. It contains options: (All), (All), ☒ Null, and ☐ E-Verify Location. Below these are 'Cancel' and 'Apply' buttons. Other filters visible include 'Hire Date' (Previous month), 'Citizenship Status' ((Multiple values)), 'I-9 Status' ((Multiple values)), 'Completion Date' (This year), and 'Completion Method' ((All)). To the right, there is an 'E-Verify Status' section and a 'Case Creation Date' dropdown set to 'This year'.

Users can download the report results in various formats by clicking the **download arrow icon**.



A screenshot of the 'My Dashboards' page. The 'Form I-9' tab is highlighted with a yellow box. Below the tabs, there is a filter bar with dropdowns for 'Work Location' ((All)), 'Hire Date' (Last 3 months), 'Citizenship Status' ((All)), 'I-9 Status' ((All)), 'Completion Date' (This year), and 'Completion Method' ((All)). A download icon (a square with a downward arrow) is highlighted with a yellow box on the right side of the filter bar.

Choose the file type of the data to be downloaded.



A screenshot of the 'Download Crosstab' dialog box. It has a title bar with a close button and a download icon. The main content area has a section 'Select a sheet from this dashboard' with two options: 'Completed I-9s' (selected with a checkmark) and 'E-Verify Status'. Below this is a 'Select Format' section with two radio buttons: 'Excel' (selected) and 'CSV'. A blue 'Download' button is at the bottom right.

## 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.*