

Offboarding User Walkthrough

This document provides a walkthrough of recommended steps to follow to offboard a former Equifax ICM Firm user.

- 1) Assess the user’s active cases. This could be done via a **Report**, or by using the **FN/Individual** module and searching based on assigned Case Manager (CM) or Responsible Attorney (RA).

See the below example of searching for Active Cases assigned to user **Smith,John** as **Case Manager**.

Case #	Dep*	Actions	Beneficiary	Process	CM/RA/PT/CA/PL	Summary
3086 Consultation - H-1B Registration			Smith, John Martin	Consultation - H-1B Registration*	JS/RJR/+/+	View
3055 AOS Employment			Smith, Jane	AOS Employment*	JS/HS/+/+	View HR Summary
3037 AOS Family			Harrison, John	AOS Family	JS/JL/+/+	View
2206-0-72440533-AOS Family	X		Long, Patrick	AOS Family*	JS/RJR/+/+	View
1 AOS Other			Thompson, Warren	AOS Other*	JS/SW/+/+	View
2206-0-72440920 AOS Family			Doe, John	AOS Family	JS/RJR/+/+	View Intake Summary

Records 1 - 6 Displayed of 6

- 2) If you would like to reassign all the user’s active cases to another user you may submit this request to the Customer Support team by emailing ICMSupport@Equifax.com, or submitting an in-system ticket via the **Help** button. Note that this service can only be offered for moving all cases from one user to *one* other user.

If you would instead like to reassign cases individually to various other users follow the steps below.

- 3) To manually reassign a case to another user, click the **Process** name from the search results (shown above) and navigate to the **Assignment** sub-folder.

Tip: Hold down the **CTRL** key and left-click all the **Processes** to open them in separate browser tabs.

From the **Assignment** sub-folder change the case assignments as desired > click **Update Info**.

Case Assignment: *Consultation - H-1B Registration

View: **Assignment** | Forms | Required Docs | Questionnaire | Activities | Receipts | Instructions | OnDocs | FN

Process Case No: 3086 Consultation - H-1B Registration

Division: Demo Org. - Tempe Office

External Firm: None

Partner: Not Assigned

Attorney/Accredited DOJ Rep: Reaume Robert

Collaborating Attorney: Not Assigned

Case Manager: Smith John

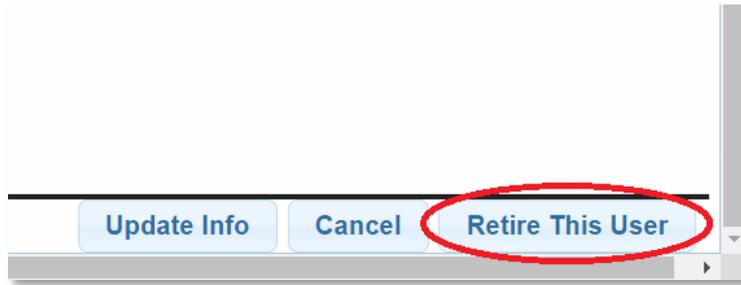
Paralegal: Not Assigned

File Location: Select One

Case Filter: None

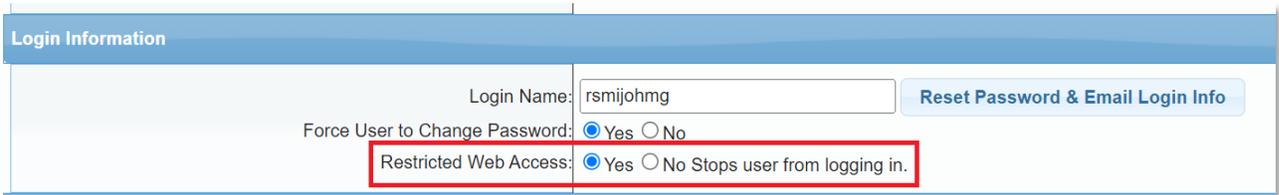
Audit History (this is only visible to Ghost User)

- 4) Once the user's cases have been reassigned open the **Administrative Settings > Users** tab > click on the user's name > scroll to the bottom right and click **Retire This User**. This will prevent the user from logging in.



If you need more time to work on reassigning the user's active cases, but want to ensure they cannot login in the meantime, prior to Retiring them you can set the **Restricted Web Access** setting to **Yes** from the user's **General** tab in the **Administrative Settings**.

Once the case reassignments have been completed don't forget to **Retire** the user.

A screenshot of the 'Login Information' section in a user management interface. It contains the following fields and controls:

- Login Name: rsmijohmg
- Force User to Change Password: Yes No
- Restricted Web Access: Yes No Stops user from logging in.

The 'Restricted Web Access' field is highlighted with a red rectangle.