

Guardian Case Notes

1.	<u>FAQ</u>	.4
2.	Creating a Case Note	<u>.5</u>
3.	Editing or Deleting a Case Note	0
4.	Deleting a Case Note	1
5.	Creating an Audit Note1	2
6.	Editing or Deleting the Audit Note1	8
7.	Viewing the Audit Note2	20

FAQ

What are Case Notes?

Case notes are notations made from an Employee or I-9 record, that can be used to document important information or events relating to an employee's Form I-9 or E-Verify case.

What is an Audit Note?

An Audit Note is a type of I-9 case note **Activity Type** within the Guardian system. When added, Audit Notes become a formal part of the I-9 record and are automatically included in the **Notice of Inspection** (NOI) response package produced by Guardian in the event of an ICE audit.

FAQ

When are Audit Notes used?

Audit notes may be applied to an I-9 record to document information that the employer believes should be provided to an auditor in the event of an NOI. For example, if an I-9 was completed late, employers may consider documenting the reason by using an Audit Note.

How are Audit Notes applied?

Audit Notes are added in chronological order to the addendum page to the given I-9 record. In the event of a NOI, these notes are also included in the export alongside the I-9, supporting documents, and E-Verify information, where applicable.

Navigate to the **Employee Record** (or the **I-9 Record**) requiring a Case Note. Click on the **OnDocs** Tab.

Denise Moreno 🐷

Announcements

Dashboard	Start I-9	Employee 🗸	E-Verify	Reports			

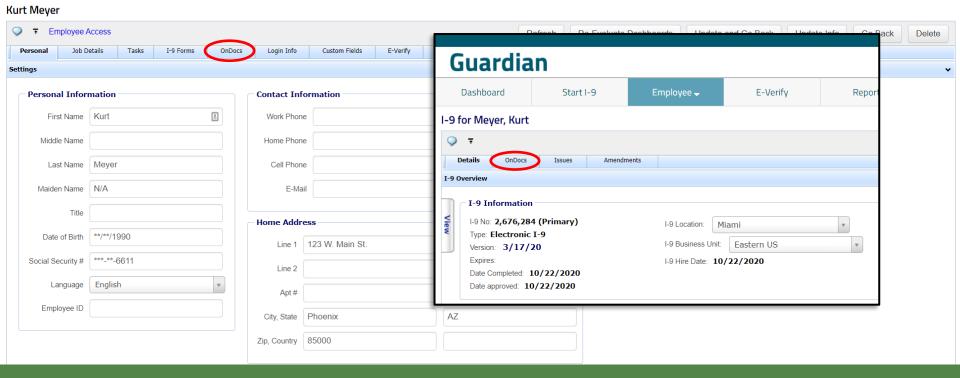
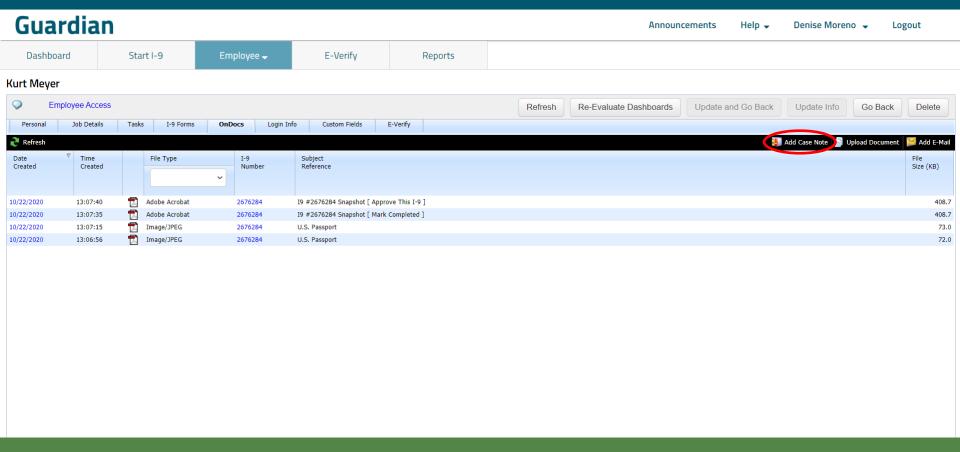


Table of Contents

Guardian

On the **OnDocs** Tab, click on the **Add Case Note** option.



On the **Case Note** screen, select an appropriate Activity Type for future reference and reporting purposes.

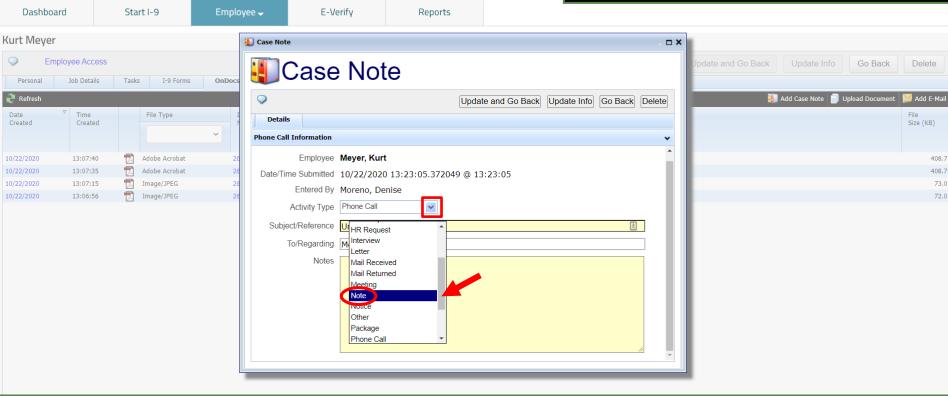
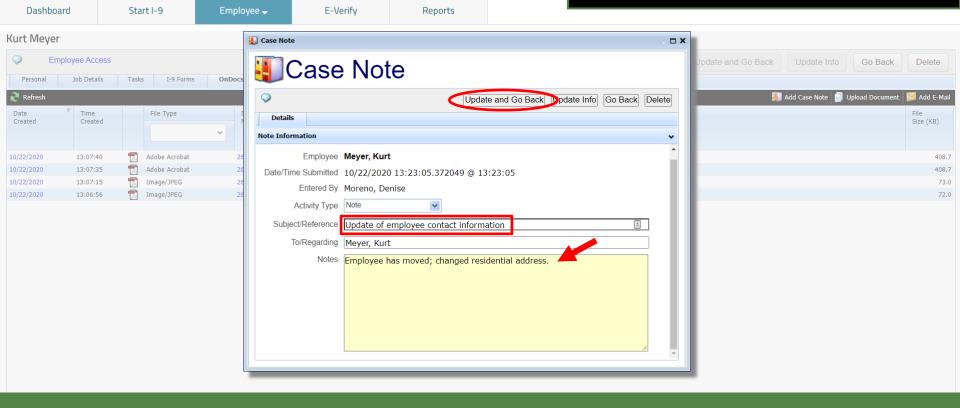


Table of Contents

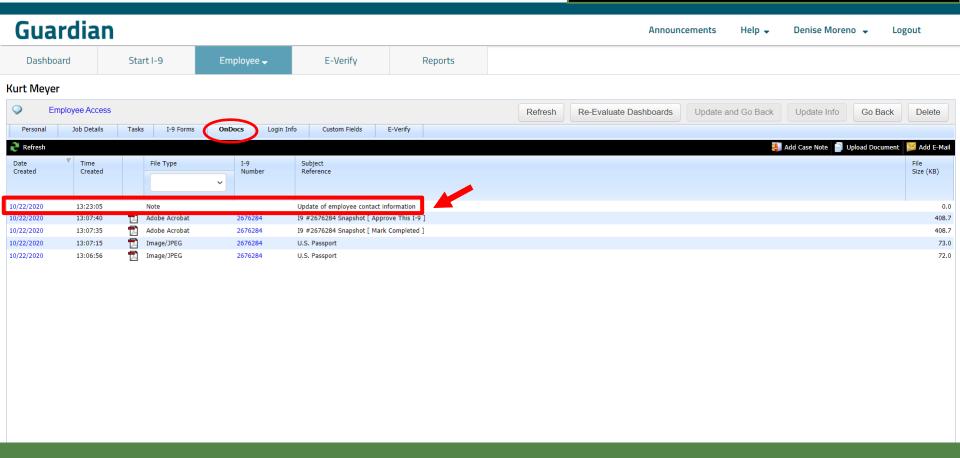
Guardian

Guardian

Enter a **Subject/Reference** and the desired **Notes**. Click the **Update and Go Back** button to save and close the Note.

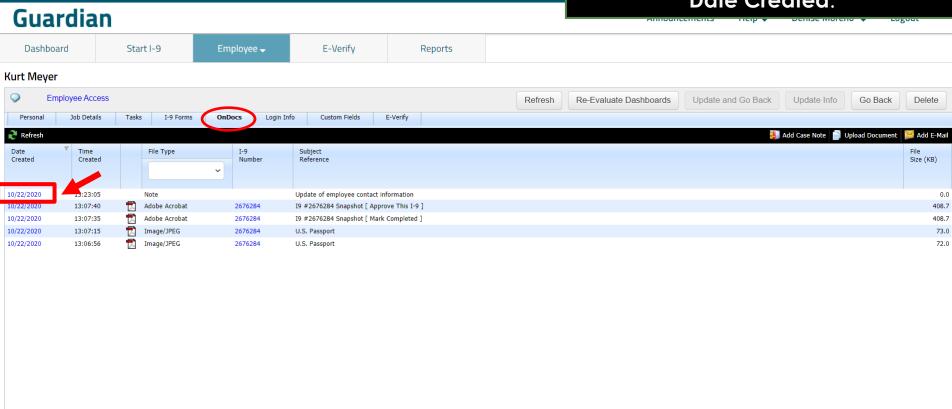


The **Case Note** will appear in the listing on the **OnDocs** tab screen.



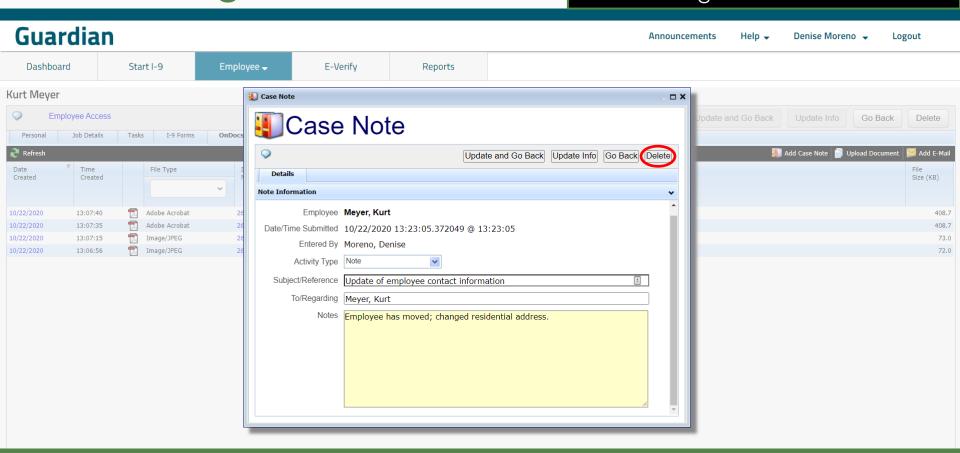
Editing or Deleting a Case Note

Case Notes can be edited or deleted by clicking the **Date Created**.

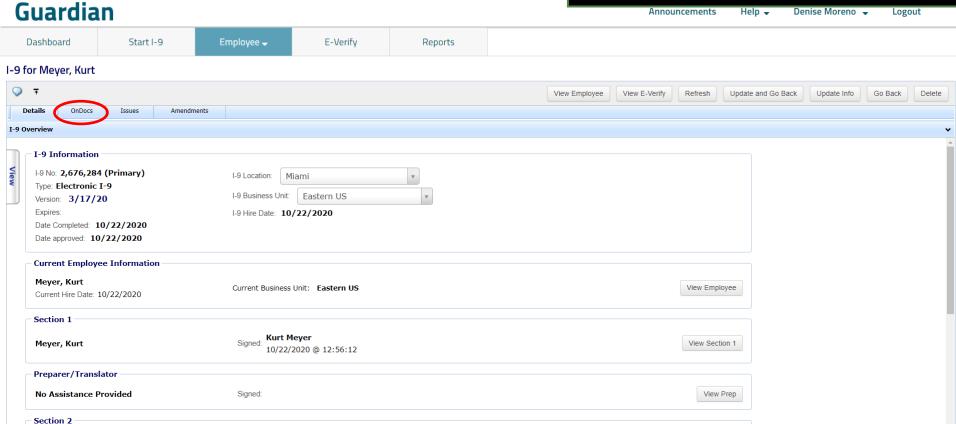


Deleting a Case Note

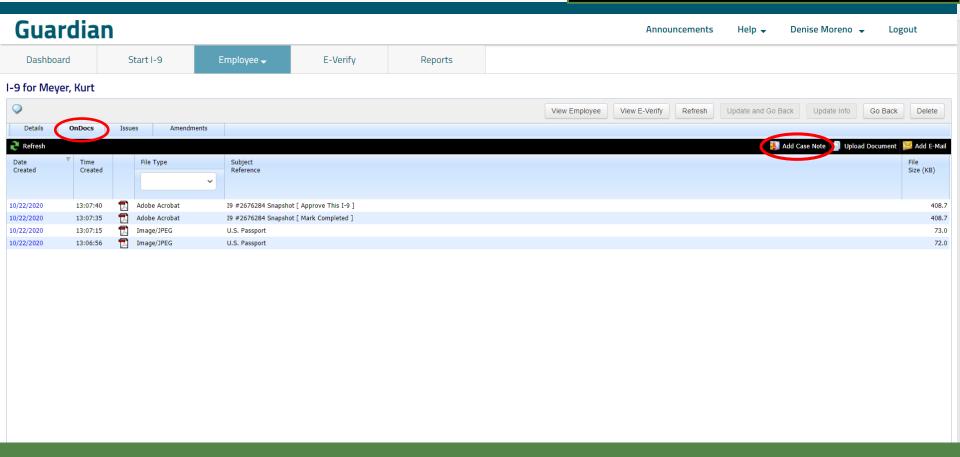
Case Notes can be deleted by clicking the **Delete** button.



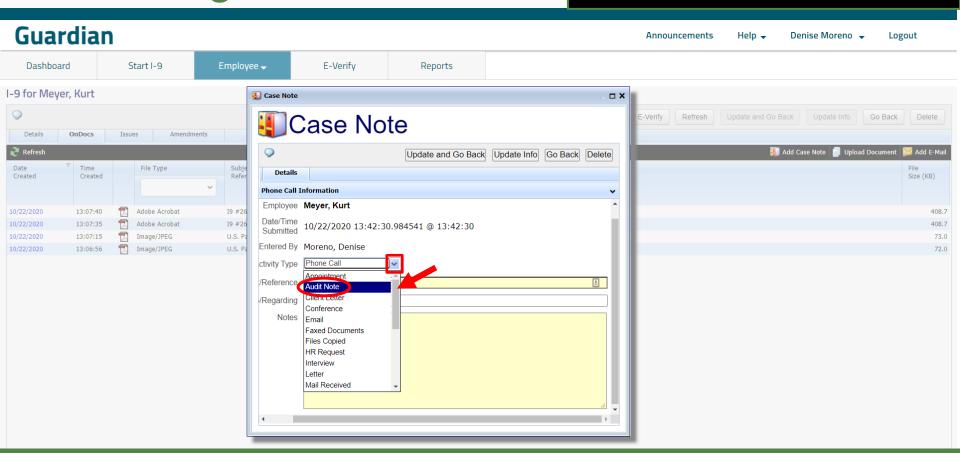
Navigate to the I-9 record requiring an Audit Note. Click on the **OnDocs** Tab.



Click the Add Case Note button.



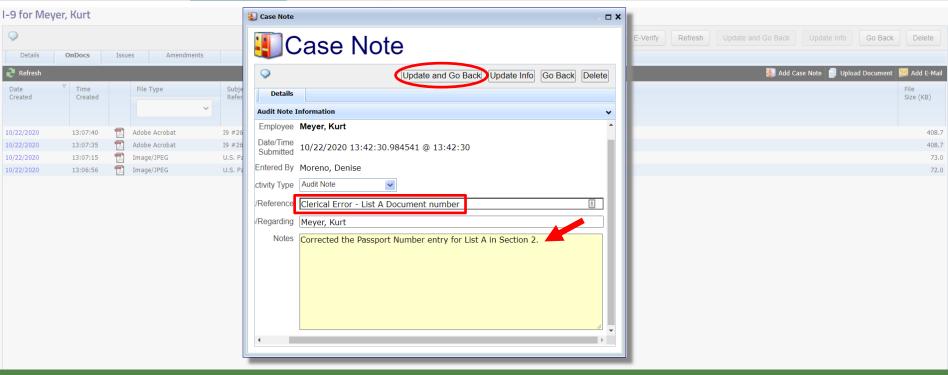
Set the **Activity Type** to **Audit Note**.



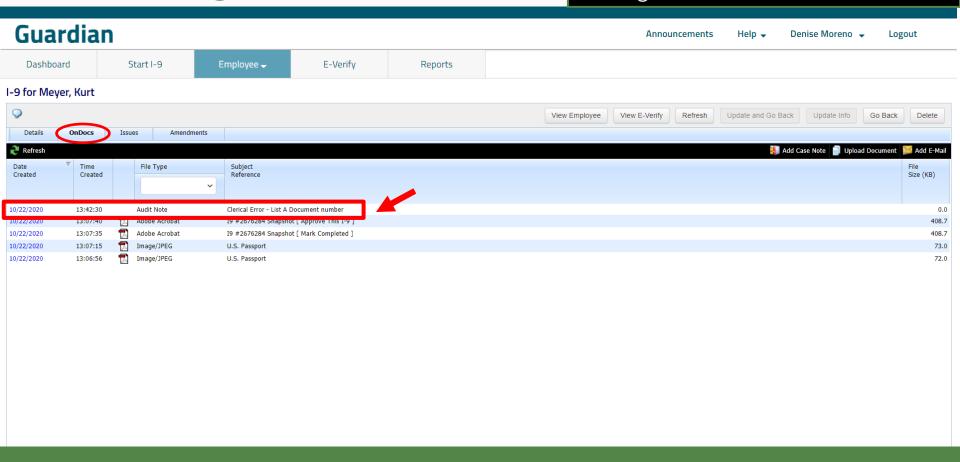
Guardian

Dashboard Start I-9 Employee → E-Verify Reports

Enter a **Subject/Reference** and the desired **Notes**. Click the **Update and Go Back** button to save and close the Note.



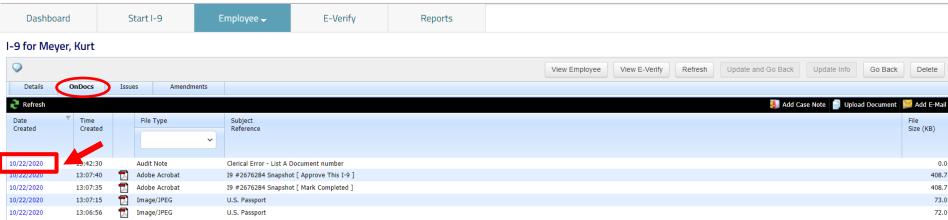
The **Audit Note** will appear in the listing on the **OnDocs** tab screen.



Editing or Deleting an Audit Note

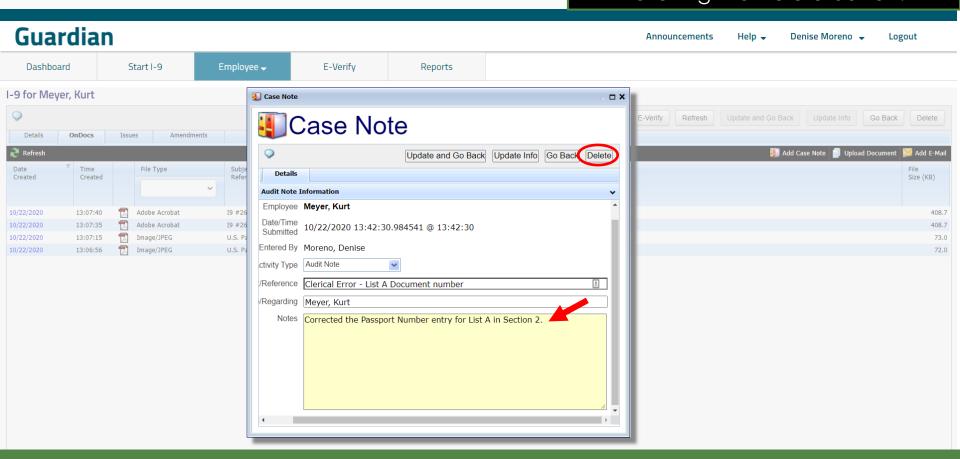
Audit Notes can be edited or deleted by clicking the **Date Created**.

Guardian



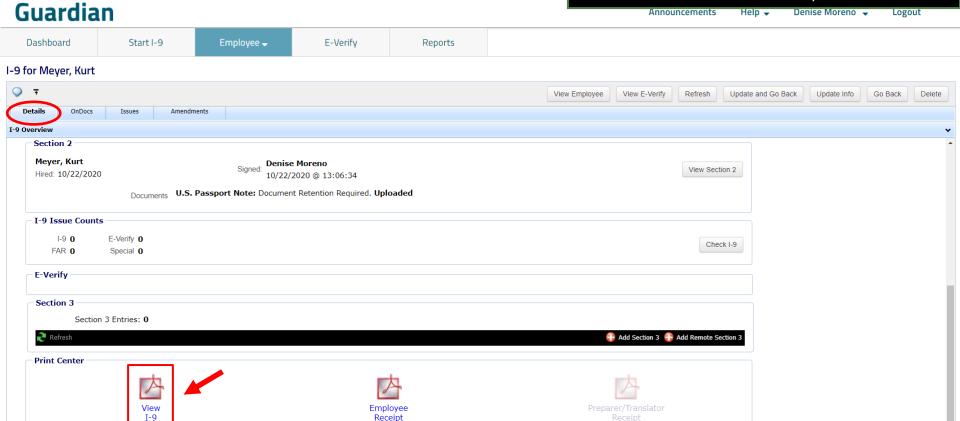
Deleting an Audit Note

Audit Notes can be deleted by clicking the **Delete** button.

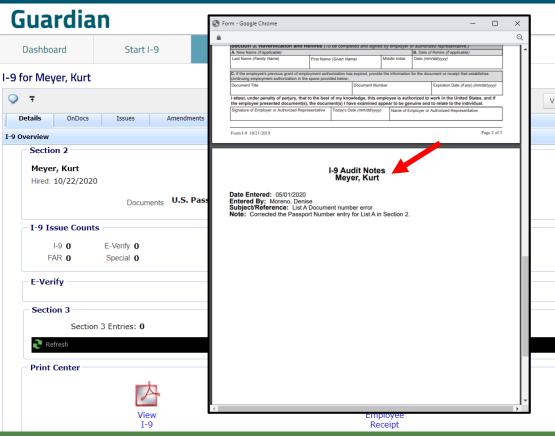


Viewing the Audit Note

At the **Details** tab of the I-9 record, click the **View I-9** link to open and view the Audit Note, if desired.



Viewing the Audit Note



Audit Notes appear as addendum pages at the end of the I-9.

In the event of an ICE **Notice of Inspection** (NOI), Audit Notes will be automatically included in the NOI package that is exported from Guardian.

View Section 2

Check I-9

譶 Add Section 3 🔒 Add Remote Section 3

For Additional Assistance

- Select Help from the vertical toolbar to access other Guardian tutorials.
- For additional assistance contact your in-house Guardian expert.

Confidential User Guide

Please do not distribute this document outside of your organization without our written permission.

Thank you.