

Employment Verification as part of PeopleHQ, Guide for Employers

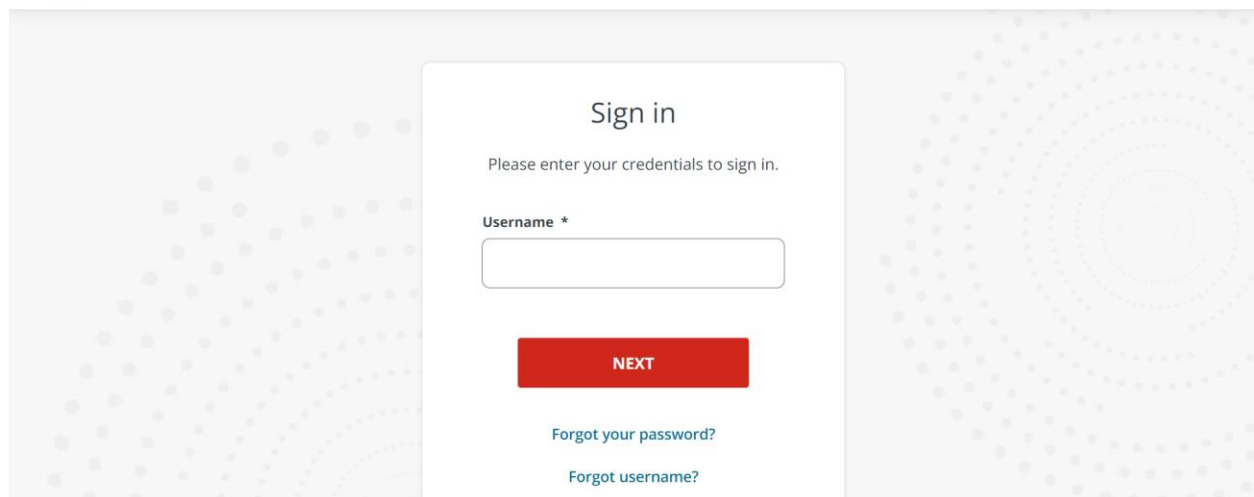
Within the PeopleHQ™ portal, you can more easily manage your service with The Work Number® from Equifax. As you get started, our internal support teams may set up the primary HR Administrator user. HR Administrators are then empowered to self-service add/edit additional users for access to PeopleHQ.

Getting started on the new PeopleHQ portal

- You will receive one email with the subject line: User Activation from noreply@equifax.com. These were set up during the implementation process or by the HR Administrator when a new user was created. The email will provide your username.
- Go to <https://business.equifax.com/auth/login?brand=adp>
- Enter your provided username
- Follow the prompts to activate your account

To login after account creation:

- Go to <https://business.equifax.com/auth/login?brand=adp>
- Enter your username and password
- If you forget your password, you can receive a one-time passcode via text, email or phone to confirm your identity
- Once you input the one-time passcode, you will be able to create a new password



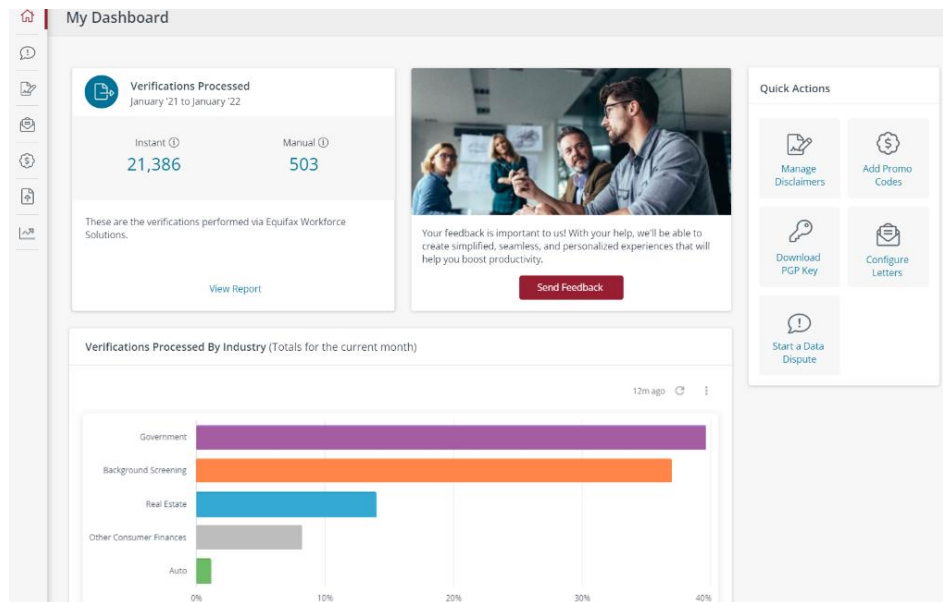
The screenshot shows a 'Sign in' page with a white background and a light gray pattern of dots. The page contains the following elements:

- Sign in** (Section Header)
- Please enter your credentials to sign in.
- Username *** (Label)
- (Text input field)
- NEXT** (Red button)
- [Forgot your password?](#) (Link)
- [Forgot username?](#) (Link)

My Dashboard

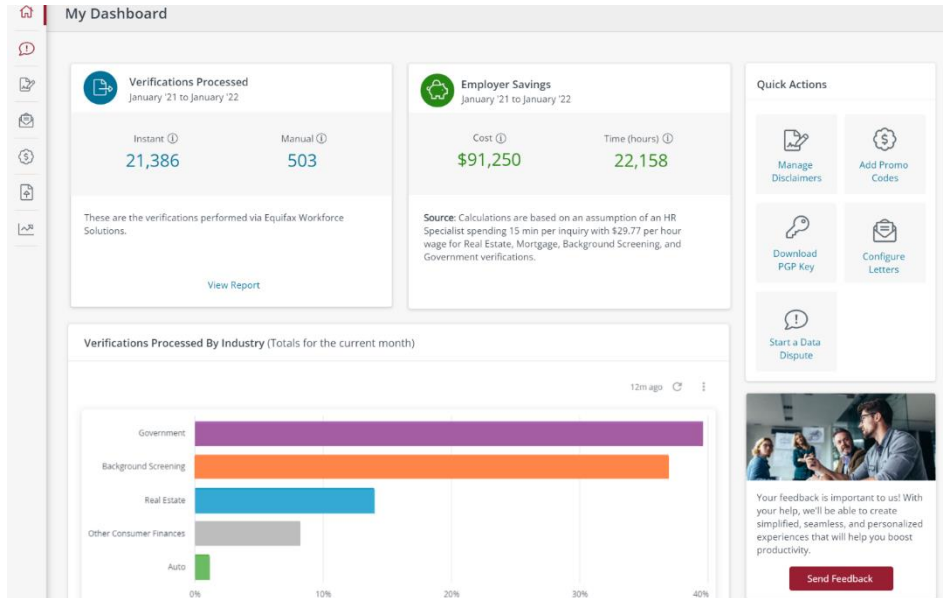
The Employer Dashboard provides a quick snapshot of your employees' Work Number transactions and your organization's estimated ROI.

The **Verifications Processed** box shows a rolling twelve month total of both instant and manual verifications performed for your organization by Equifax Workforce Solutions. At the bottom of this box, there is a quick link to access your transaction reporting.



Organizations with a large amount of employees will see the **Employer Savings** box, where you can see the estimated time and money saved by your organization through a rolling twelve month period. Calculations are based on an assumption of an HR Specialist spending 15 minutes per inquiry with a \$29.77 per hour wage* for Real Estate, Mortgage, Background Screening, and Government verifications.

*Average HR Specialist salary in 2019 according to the US Bureau of Labor Statistics

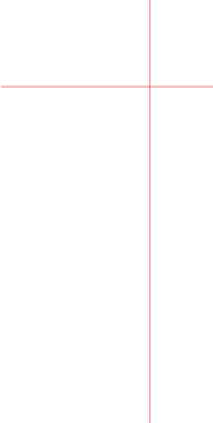


As you scroll down, you can view your **Verifications Processed by Industry** and **Verifications Processed by Report Type** for the current month with the ability to select the reports' time frames with the drop down in the upper right corner of each chart.

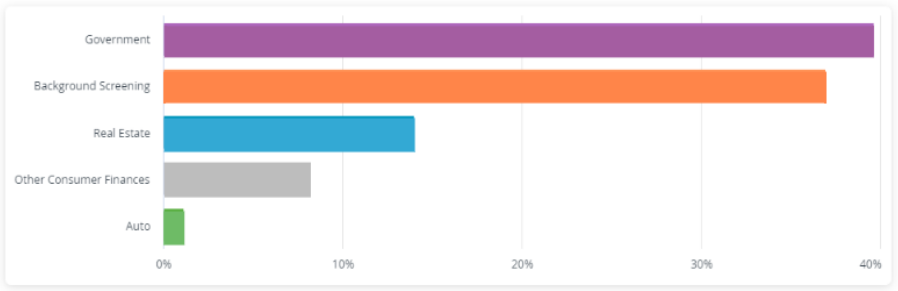
*Data is anonymized.



Always Designing
for People™



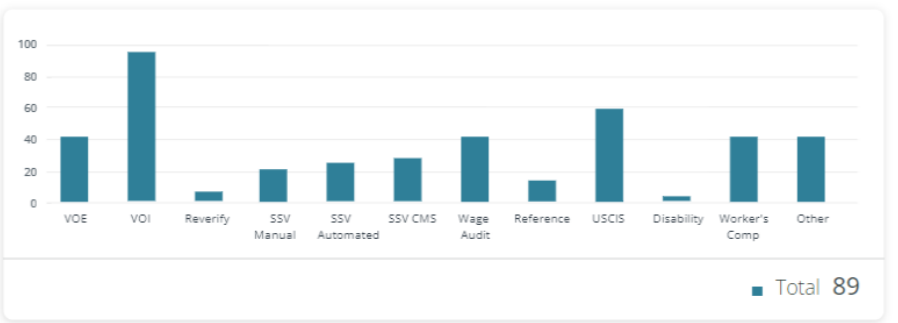
Verifications Processed By Industry (Totals for the current month)



12m ago

Powered by Looker

Verifications Processed for [Enterprise USA] by Report Type (Totals for the current month)



12m ago

Total 89

Powered by Looker

Data Disputes

You should notify The Work Number of an employee's dispute of their information through the Employer Data Dispute Assistance feature. Navigate to the Data Dispute page for information on the Data Dispute process, steps to consider for an employee data dispute, as well as a quick link button to access the Employer Initiated Data Dispute contact form.

Data Dispute Center

You may start a dispute by clicking the Start a Data Dispute button. Employers needing assistance with updating information on The Work Number® verification service, our Data Investigation Team (DIT) can help.

[Start a Data Dispute](#)

Employer Data Dispute Process

The Fair Credit Reporting Act (FCRA) Data Furnisher Rules require employers to make themselves available to receive data disputes directly from their employees. Given that employers send data to The Work Number® from Equifax verification service, the employer making the change in the payroll file can remedy many instances of incorrect data. When an employee of your company contacts you with a concern about the accuracy of data that was provided by The Work Number, please follow the steps outlined below.

Steps to Consider for an Employee Data Dispute [Show Less](#)

- Review the data field in question by your employee.
- Determine the correct value for that data field.
- Confirm and/or correct that value in your HR/Payroll system.
- Confirm the correct value is being displayed on The Work Number.
- During the investigation process, the employee's disputed record will be blocked. A Data Investigation Team analyst will contact you within 5 business days of receiving your request form. Questions regarding the dispute process can be emailed to employerdisputes@equifax.com.
- A Data Investigation Team analyst will contact you within 5 business days of receiving your request form. Questions regarding the dispute process can be emailed to employerdisputes@equifax.com.

EQUIFAX | The Work Number [How It Works](#) [Solutions](#) [Investigations](#) [Partner With Us](#) [Contact](#) [Sign Up](#) [Log In](#)

Home - Employer Dispute Investigation Req...

STEP 1 OF 2

EMPLOYER INITIATED DATA DISPUTE REQUEST

Under the Fair Credit Reporting Act (FCRA), consumers may request a dispute to a data furnisher employer. In such a case, employers are obligated to either correct the disputed information or provide notice of the dispute to Equifax Workforce Solutions (EWS) before sending that dispute data to CRAs again. Since employees send data to The Work Number®, many instances of incorrect data can be quickly remedied by the employer making the change on their own database.

Should an employer of your company contact you with a concern about the accuracy of data that was provided by The Work Number, please take the following actions:

1. Identify the field in question by your employee.

Disclaimers







Disclaimers are free form text fields provided by employers to share any informative details to a verifier. Employers have the ability to create or adjust employer disclaimers that appear on employee verifications. By default, no employer disclaimer is displayed on any verification or letter type until it is assigned. To edit an existing disclaimer, click on the pencil icon next to that disclaimer type. To remove a disclaimer click on the trash can next to that disclaimer type.

ADP Search... Hi, Kelli

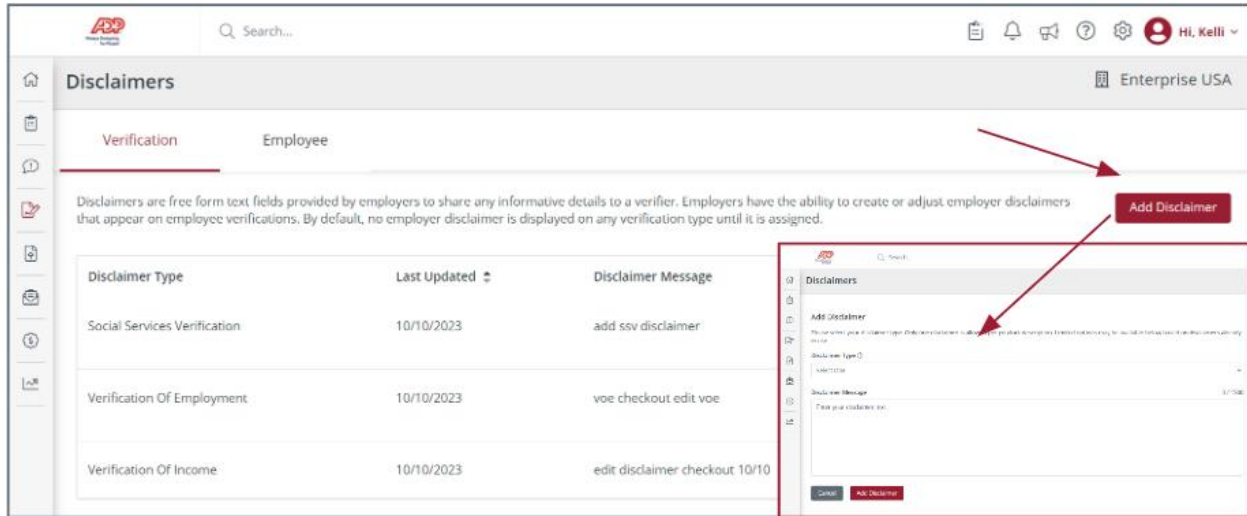
Disclaimers Enterprise USA

Verification Employee

Disclaimers are free form text fields provided by employers to share any informative details to a verifier. Employers have the ability to create or adjust employer disclaimers that appear on employee verifications. By default, no employer disclaimer is displayed on any verification type until it is assigned. [Add Disclaimer](#)

Disclaimer Type	Last Updated	Disclaimer Message	Actions
Social Services Verification	10/10/2023	add ssv disclaimer	 
Verification Of Employment	10/10/2023	voe checkout edit voe	 
Verification Of Income	10/10/2023	edit disclaimer checkout 10/10	 

To create a new disclaimer, select the **“Add a Disclaimer”** button on the **“Organization”** tab. Once on the Add Disclaimer page, select the type and description of your new disclaimer from the drop down menus. In the Disclaimer Message field, write the disclaimer as you’d like it to appear on the selected letter. Please note the maximum character limit (including spaces) is 1500 for any disclaimer.



The screenshot displays the ADP Disclaimers management interface. At the top, there are navigation tabs for 'Verification' and 'Employee'. Below the tabs, a table lists existing disclaimers:

Disclaimer Type	Last Updated	Disclaimer Message
Social Services Verification	10/10/2023	add ssv disclaimer
Verification Of Employment	10/10/2023	voe checkout edit voe
Verification Of Income	10/10/2023	edit disclaimer checkout 10/10

An 'Add Disclaimer' modal window is shown, containing the following fields:

- Disclaimer Type (dropdown menu)
- Disclaimer ID (dropdown menu)
- Disclaimer Message (text input field with a character count of 1500)

Employee Disclaimers allow employers to submit a specific disclaimer for a certain employee or group of employees.

Configuring Employee Disclaimers is an advanced feature. Please contact your Client Relationship Manager for more information. To view any Employee level disclaimers your organization has set up, click on the Employee tab once in the Disclaimers section and click on the eye icon(s) for more details.

Letters Center


We understand that there are some instances outside of employment and income verification requests from credentialed verifiers where your employees may need to provide proof of employment and/or income to a third-party. The Work Number® from Equifax can help. Our Letters Center functionality enables your employees to self-generate a Letter of Immigration if needed.

To learn more about other letters (Employment Letter, Employment and Income Letter, Public Service Loan Forgiveness and Remote Work Letter), please consult with your Client Relationship Manager.

ADP Always Designing for People™ Search...

Letters Center

Below are the letters available for your organization. You can make updates or review these templates. Published letters will be available to download by your employees.

 **Immigration**

Can be used to show the U.S. Citizenship and Immigration Services or government embassies proof of employment and income for an employee.

Promo Codes

You can provide a free trial promo code to a verifier who is unable or unwilling to pay for The Work Number verification service. This code will allow them to pull one verification of employment or income. Verifiers utilizing promo codes are still required to be credentialed per FCRA guidelines prior to obtaining the verification.











Promo Codes

You have 6 out of 10 promo codes available.

Provide a promo code to a verifier who would like a one-time use verification through The Work Number®. This code will allow them to pull a verification of employment or income. [Add Promo Code](#)

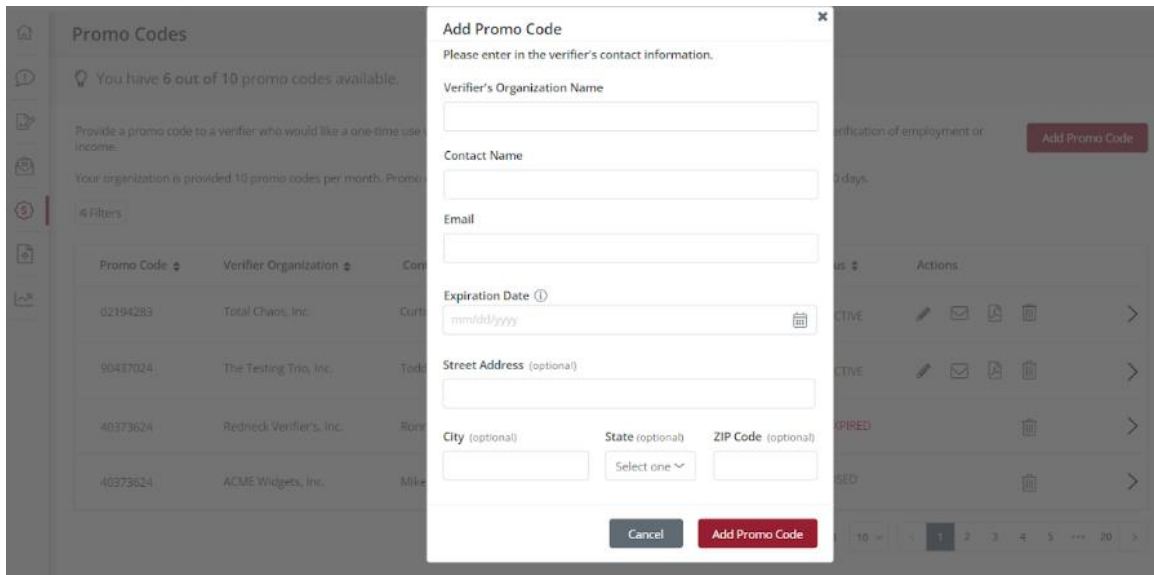
Your organization is provided 10 promo codes per month. Promo codes can only be used once, expire after 30 days, and remain viewable for 90 days.

Filters

Promo Code	Verifier Organization	Contact	Issued Date	Expiration Date	Status	Actions
02194283	Total Chaos, Inc.	Curtis Chaos	03/08/2021	04/08/2021	✓ ACTIVE	    >
90437024	The Testing Trio, Inc.	Todd Triplett	04/11/2021	05/11/2021	✓ ACTIVE	    >
40373624	Redneck Verifier's, Inc.	Ronnie Redneck	01/08/2019	02/08/2019	✗ EXPIRED	 >
40373624	ACME Widgets, Inc.	Mike Runner	12/11/2018	01/11/2019	⊖ USED	 >

1-10 of 1250 10 < 1 2 3 4 5 ... 20 >

To get started, select the “Promo Code” tab from the PeopleHQ menu. Here you can view your promo code history, see which are active, expired, or have been used, and add a new promo code. To add a new promo code, select the “Add Promo Code” button in the top right corner. Fill out the information in the pop-up and select “Add Promo Code” at the bottom to generate the new code. Please note your organization is provided 10 promo codes per month. Promo codes can only be used once, expire after 30 days, and remain viewable for 90 days.



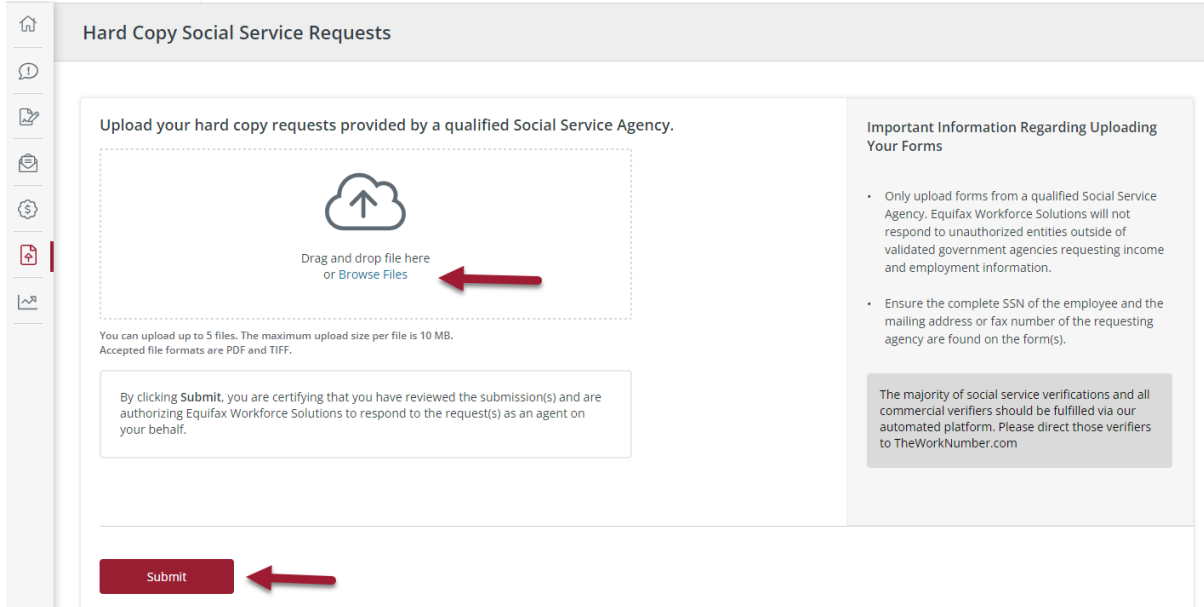
Promo Code	Verifier Organization	Contact Name
02194283	Total Chaos, Inc.	Curt
90437024	The Testing Trio, Inc.	Todd
40373624	Redneck Verifier's, Inc.	Russ
40373624	ACME Widgets, Inc.	Mike

File Management

If an agency connects with you directly and/or manually sends you a form for completion, their request for information should be forwarded to The Work Number for manual processing. You can electronically upload the form via the PeopleHQ **File Management** screen.

Drag and drop your file(s) here or browse for your file(s). You can upload up to 5 files at a time with a maximum upload size of 10 MB per file. Accepted formats are PDF and TIFF.

By clicking Submit, you are certifying that you have reviewed the submission(s) and are authorizing Equifax Workforce Solutions to respond to the request(s) as an agent on your behalf.



Hard Copy Social Service Requests

Upload your hard copy requests provided by a qualified Social Service Agency.

Drag and drop file here
or Browse Files

You can upload up to 5 files. The maximum upload size per file is 10 MB.
Accepted file formats are PDF and TIFF.

By clicking Submit, you are certifying that you have reviewed the submission(s) and are authorizing Equifax Workforce Solutions to respond to the request(s) as an agent on your behalf.

Submit

Important Information Regarding Uploading Your Forms

- Only upload forms from a qualified Social Service Agency. Equifax Workforce Solutions will not respond to unauthorized entities outside of validated government agencies requesting income and employment information.
- Ensure the complete SSN of the employee and the mailing address or fax number of the requesting agency are found on the form(s).

The majority of social service verifications and all commercial verifiers should be fulfilled via our automated platform. Please direct those verifiers to TheWorkNumber.com

Reports

Get a clearer idea of the performance and ROI provided by The Work Number. Monthly activity reports are available in Adobe PDF format, allowing you to download them directly. Reports for the past 6 months are available. There are two types of reports available in PeopleHQ:

- **Load Reports** - A load report may be available for review once a file has loaded to The Work Number.
- **Monthly Activity Reports** – These reports include the Employer Summary Report, Employer Condensed Group Report, and the Employer Group Report. Each report reflects the verification transactions by type and may be further broken down by division and/or day.

*Data is anonymized

Report Dashboard

Select a Report Type
Choose a report type below to view all processed reports for that type.

Load Report

View a load report of your most recent file import after it has downloaded to The Work Number.
Category: The Work Number

Generated in the last 7 days:
3 reports

Employer Summary

View verification transactions by type for your organization broken down by day and division within a specific date range.
Category: The Work Number

Generated in the last 7 days:
1 report

Employer Condensed Group

View the total number of verification transactions by type across all divisions within a specific date range.
Category: The Work Number

Generated in the last 7 days:
1 report

Employer Group Report

View the total number of verification transactions by type for your organization broken down by month and division.
Category: The Work Number







Generated in the last 7 days:
1 report

Once you have accessed the type of report you would like to review, click the download icon beside the report to download it.

The Work Number® Processed Reports

Load Report
View a load report of your most recent file import after it has downloaded to The Work Number. Reports are read-only.

Processed Load Reports
The Work Number Load Reports that have been initiated or processed. Here, you'll see any status for processing reports along with reports that are available to download.

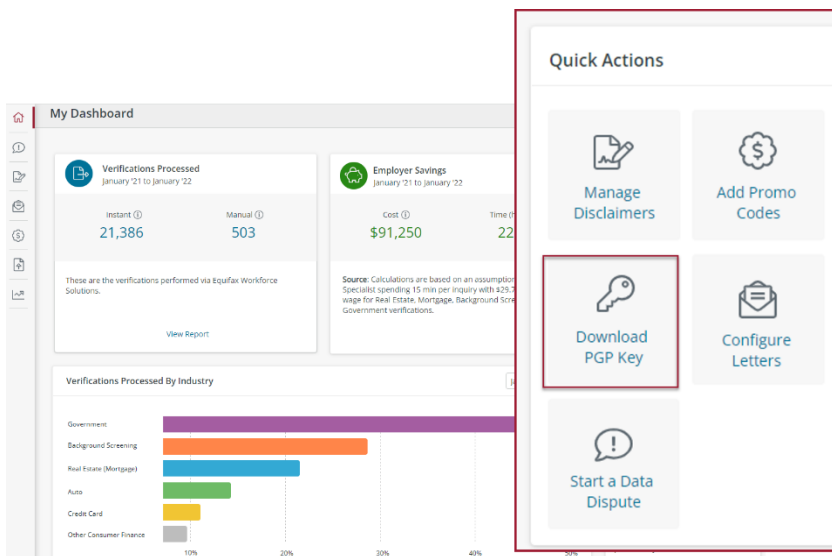
Report Name	Category	Run Date	Start Date	End Date	Actions
Load Report	The Work Number	03/30/2022	02/30/2022	03/30/2022	
Load Report	The Work Number	02/30/2022	01/30/2022	02/30/2022	
Load Report	The Work Number	01/30/2022	12/30/2021	01/30/2022	
Load Report	The Work Number	12/30/2021	11/30/2021	12/30/2021	
Load Report	The Work Number	11/30/2021	10/30/2021	11/30/2021	
Load Report	The Work Number	10/30/2021	09/30/2021	10/30/2021	

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Download PGP Key

Encrypting your data files prior to transmitting them to Equifax via SFTP protects the data as it travels over the public Internet.

To download Equifax Workforce Solutions Public Key, click on Download PGP Key from the Quick Actions on My Dashboard. This will take you to the following link where you are able to download the key: <https://theworknumber.com/pgp>.



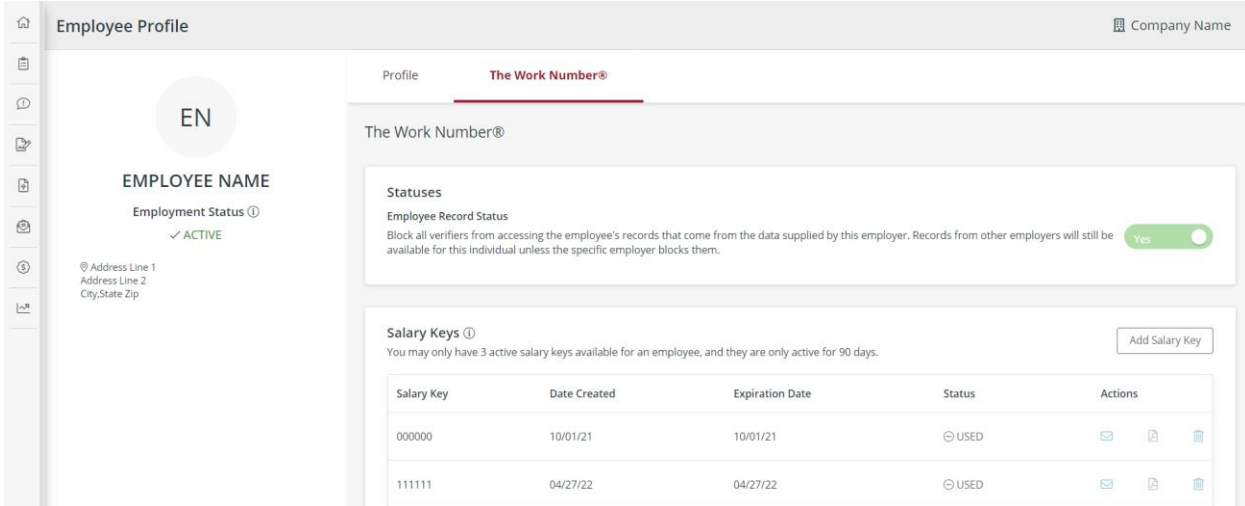
The screenshot displays the 'My Dashboard' interface. On the left, there are navigation icons. The main content area includes two summary cards: 'Verifications Processed' (January '21 to January '22) with 'Instant' at 21,386 and 'Manual' at 503; and 'Employer Savings' (January '21 to January '22) with 'Cost' at \$91,250 and 'Time' at 22. Below these is a bar chart titled 'Verifications Processed By Industry' showing percentages for Government, Background Screening, Real Estate (Mortgage), Auto, Credit Card, and Other Consumer Finance. On the right, a 'Quick Actions' panel is overlaid, containing buttons for 'Manage Disclaimers', 'Add Promo Codes', 'Download PGP Key' (highlighted with a red box), 'Configure Letters', and 'Start a Data Dispute'.

Employee Profile

You have the ability to make a few adjustments to individual employee records through the Employee Profile screen. Start by searching for the employee by SSN or by name in the search bar. Select the correct employee name to view their employee profile.

On the employee profile, you will see a menu of options where you can:

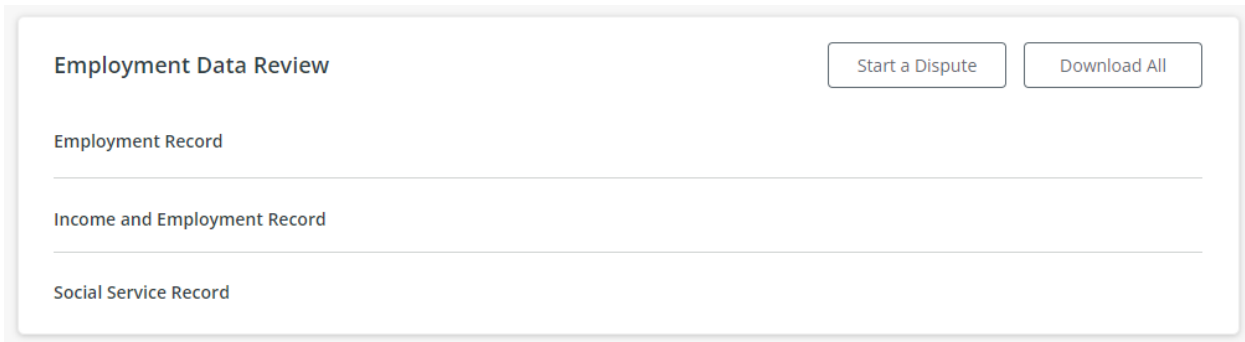
- Help an employee to block or unblock their data from being accessed by verifiers.
- Create a Salary Key on behalf of an employee - Newly created Salary Keys expire after 90 days



The screenshot shows the 'Employee Profile' page for 'The Work Number'. On the left, there is a sidebar with navigation icons and a profile card containing the employee's initials 'EN', name, and status 'ACTIVE'. The main content area is titled 'The Work Number' and includes sections for 'Statuses' (with an 'Employee Record Status' toggle set to 'Yes') and 'Salary Keys'. The 'Salary Keys' section contains a table with the following data:

Salary Key	Date Created	Expiration Date	Status	Actions
000000	10/01/21	10/01/21	USED	[Email] [Print] [Delete]
111111	04/27/22	04/27/22	USED	[Email] [Print] [Delete]

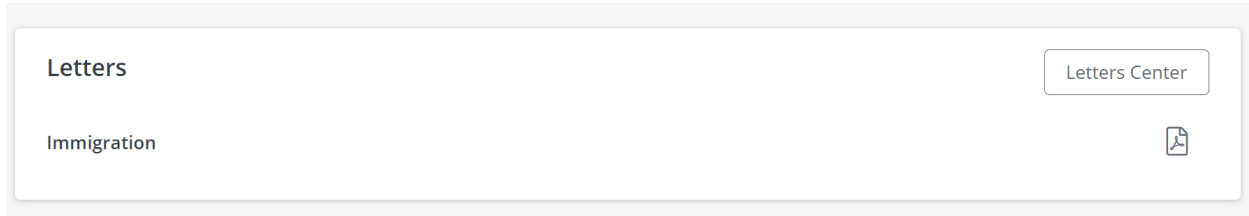
Continue to scroll down the screen and see the information related to your company presented on an employee's verification with **Employment Data Review**.



The screenshot shows the 'Employment Data Review' section. At the top, there are two buttons: 'Start a Dispute' and 'Download All'. Below these are three expandable sections: 'Employment Record', 'Income and Employment Record', and 'Social Service Record'.

- View the Employment, Income and Employment, and Social Service Record by clicking on **Download All** to retrieve all three records in one report.
- Notify The Work Number of an employee's dispute of their information through the **Start a Dispute** button

Next on this screen is the ability to view samples of an employee's letters. Click on the **PDF icon** to download a sample. Click on **Letters Center** to go back to the Letters Center screen to change any configurations.



Communication Templates

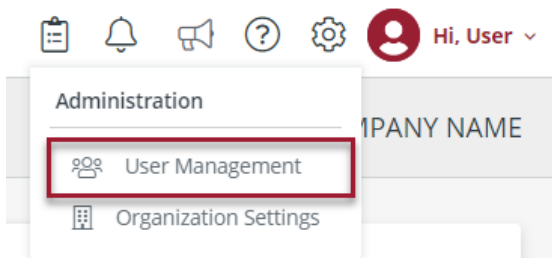
Download and use our standard templates to rollout The Work Number information to your employees, verifiers and your internal staff: <https://theworknumber.com/employer-resources>
The templates can be used to introduce The Work Number services to new employees or re-communicate to existing employees.

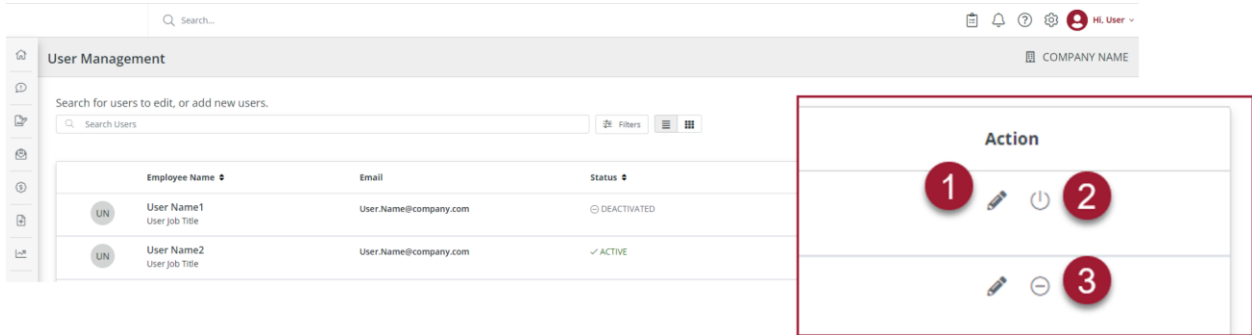
We suggest these be reviewed periodically by The Work Number administrators to ensure that all audiences are aware of The Work Number and its use by your organization. This helps ensure a more positive Work Number experience for everyone. (Link to Employer Communications - <https://theworknumber.com/employer-resources>)

User Management

Users with the HR Admin role can perform all the functions we discussed in this guide and also have the additional capability to manage users and permissions..

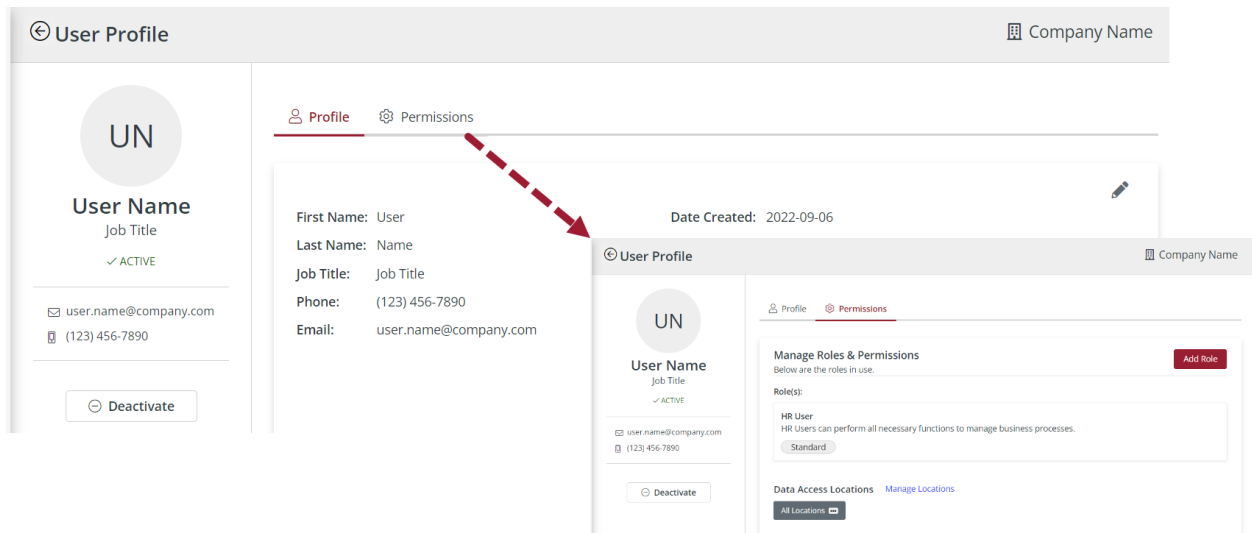
From the Administration Cog in the upper right hand corner, choose **User Management**.





The screenshot shows the 'User Management' interface. At the top, there is a search bar and a 'COMPANY NAME' dropdown. Below this is a table with columns for 'Employee Name', 'Email', and 'Status'. Two users are listed: 'User Name1' (deactivated) and 'User Name2' (active). To the right of the table is an 'Action' menu with three numbered items: 1. Pencil icon (Edit), 2. Power icon (Deactivate), and 3. Plus icon (Add).

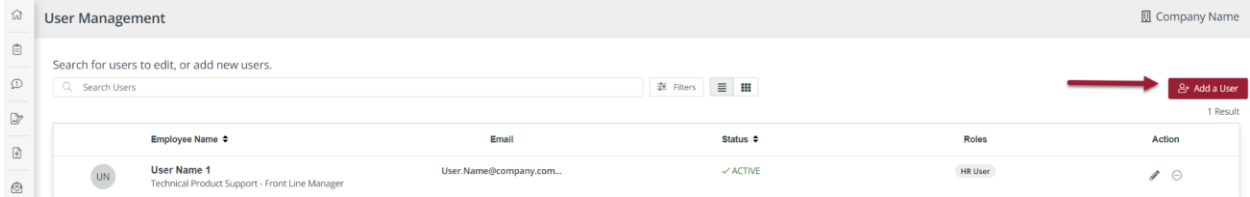
1. **Pencil Icon:** Edit the user.
 - a. From the User Profile screen, you are able to edit the profile information and/or permissions.



The screenshot shows the 'User Profile' interface. On the left, there is a user profile card with a circular avatar containing 'UN', the name 'User Name', job title, and status 'ACTIVE'. Below this are contact details: email 'user.name@company.com' and phone '(123) 456-7890'. A 'Deactivate' button is at the bottom. On the right, there is a 'Permissions' section with a red dashed arrow pointing to it. This section shows 'Date Created: 2022-09-06' and a 'Manage Roles & Permissions' section with a 'Standard' role and a description: 'HR Users can perform all necessary functions to manage business processes.' There is also a 'Data Access Locations' section with 'All Locations' selected.

2. **'On' Button:** Activates a previously deactivated user.
3. **'Off' Button:** Deactivate an active user.

To add a new user, click on **Add a User**.



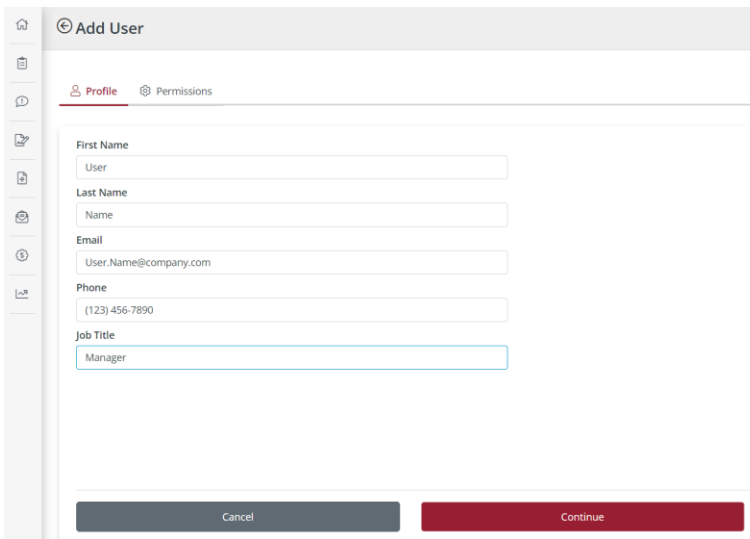
User Management Company Name

Search for users to edit, or add new users.

Search Users Filters Grid ➔ Add a User 1 Result

Employee Name	Email	Status	Roles	Action
User Name 1 Technical Product Support - Front Line Manager	User.Name@company.com...	✓ ACTIVE	HR User	

Enter the user's information and click **Continue**.



➔ Add User

Profile Permissions

First Name

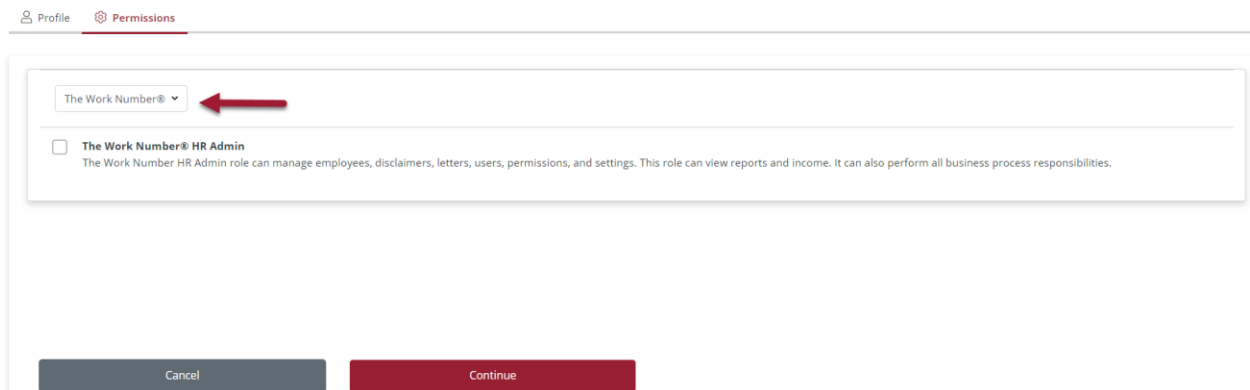
Last Name

Email

Phone

Job Title

Under the Permissions tab, please choose *The Work Number®* from the dropdown.



Profile Permissions

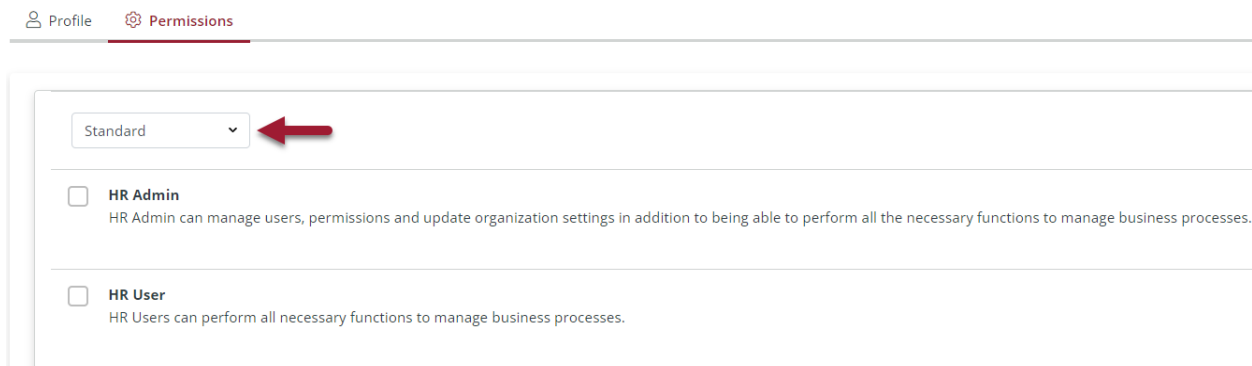
The Work Number® ➔

The Work Number® HR Admin
The Work Number HR Admin role can manage employees, disclaimers, letters, users, permissions, and settings. This role can view reports and income. It can also perform all business process responsibilities.

The Work Number® HR Admin role will appear. The Work Number® HR Admin users have elevated permissions, allowing them to manage employees, disclaimers, letters, users, permissions and settings. This role can perform all business responsibilities and view reports and income. These users have full access and privileges. The Work Number® HR Admin functions include:

- Add/Manage Users and user permissions
- View Dashboard
- View Employment Data Review Records (VOE/VOI/SSV)
- Manage Letters
- Manage Disclaimers
- View reports and income
- View/Start Disputes
- View/Edit Promo Codes
- View/Add/Delete Salary Keys
- View Load Reports
- View Employer Reports
- Manage Logo and Organization color
- Manage Work Locations

The other option from the dropdown is *Standard*.



Profile Permissions

Standard

HR Admin
HR Admin can manage users, permissions and update organization settings in addition to being able to perform all the necessary functions to manage business processes.

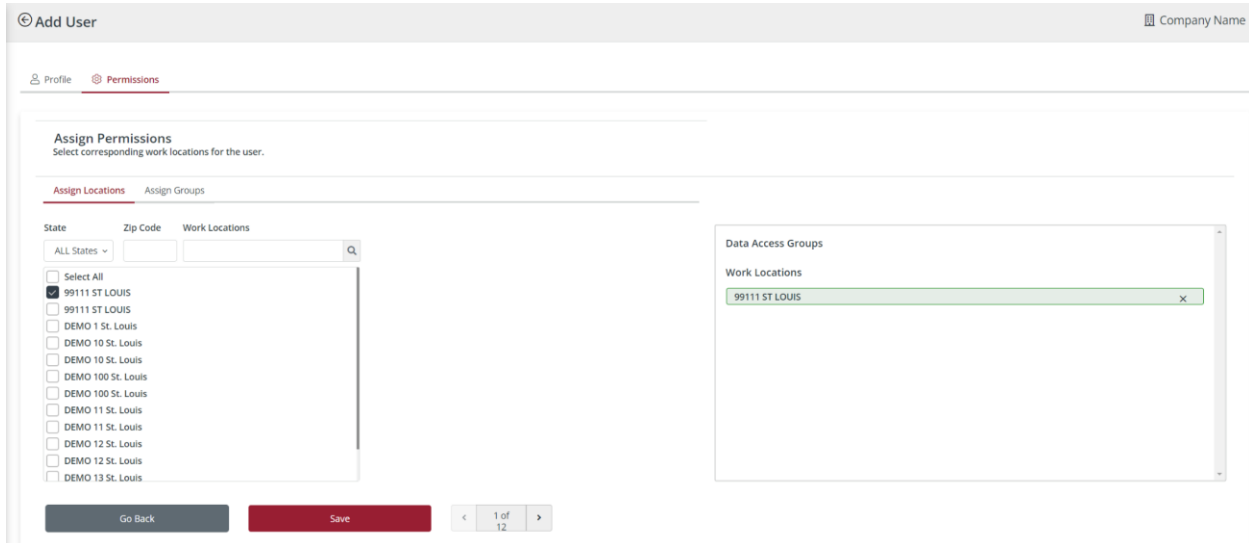
HR User
HR Users can perform all necessary functions to manage business processes.

The roles listed under *Standard* include **HR Admin** and **HR User**. The HR Admin role is the same as The Work Number® HR Admin role. The HR User is another role listed under *Standard*. The HR Users can perform all business process responsibilities but cannot manage users.

NOTE: Choose a role either from The Work Number® dropdown OR the Standard dropdown, not both. We recommend using The Work Number® Admin Role unless you do not want a user to be able to manage other users. That is when the standard HR User role may be helpful. The Standard roles will be retired in the near future and all roles will show under The Work Number® dropdown instead.

Once you have chosen the appropriate permission, click **Continue**.

Next, assign locations if applicable. Click on the location or click Select All to move the location over to the Data Access Groups. Click **Save**.



The screenshot shows the 'Add User' interface with the 'Permissions' tab selected. Under 'Assign Permissions', the 'Assign Locations' sub-tab is active. It features a search bar for 'Work Locations' and a list of locations. The first item, '99111 ST LOUIS', is checked. To the right, a 'Data Access Groups' window is open, showing '99111 ST LOUIS' as a selected group. At the bottom, there are 'Go Back' and 'Save' buttons, along with a pagination indicator showing '1 of 12'.

The new user will then receive an email from noreply@equifax.com with a provided username which will be used to log in. Then the user will follow the prompts to activate their account.

Have Questions?

For any additional questions, your Client Relationship Manager is your primary contact for Employment Verifications. The Work Number Solutions Support team is also available to provide prompt attention to service-related requests for The Work Number. Members of the Solution Support team will respond to service-related technical requests and, if needed, will escalate and follow-up internally until your question is answered or the issue is resolved.