

The Work Number, 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.

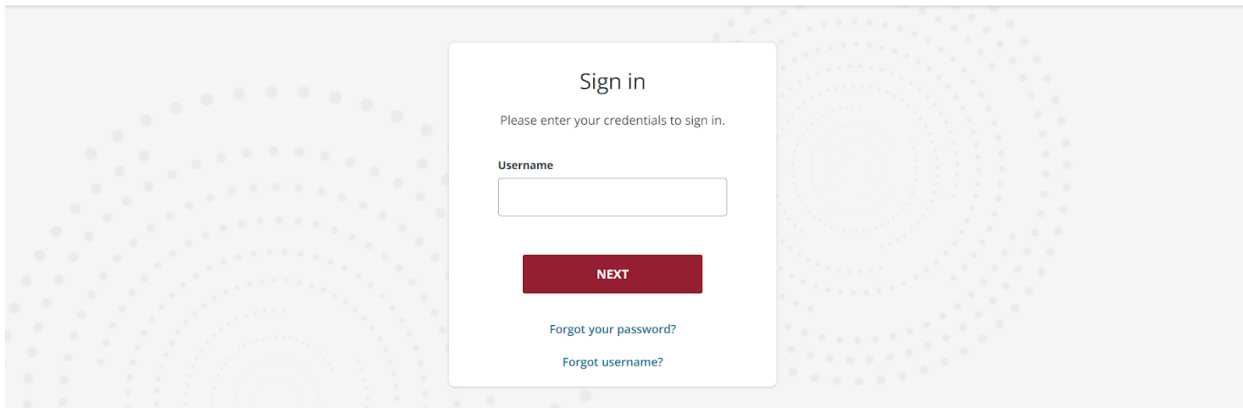
Getting started on the new PeopleHQ portal

- 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 workforceportal.equifax.com
- Enter your provided username
- Follow the prompts to activate your account

To login after account creation:

- Go to workforceportal.equifax.com
- 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

EQUIFAX

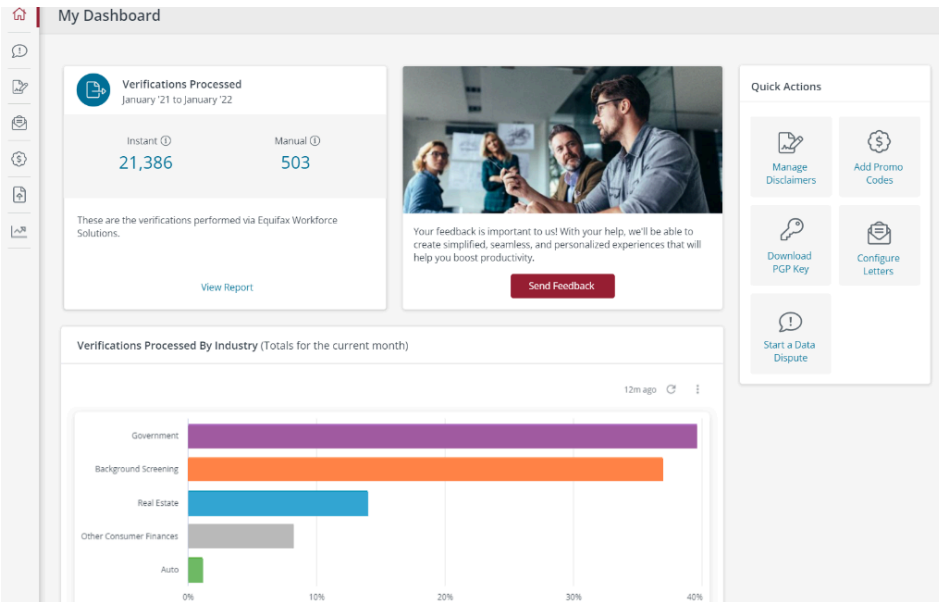


My Dashboard

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

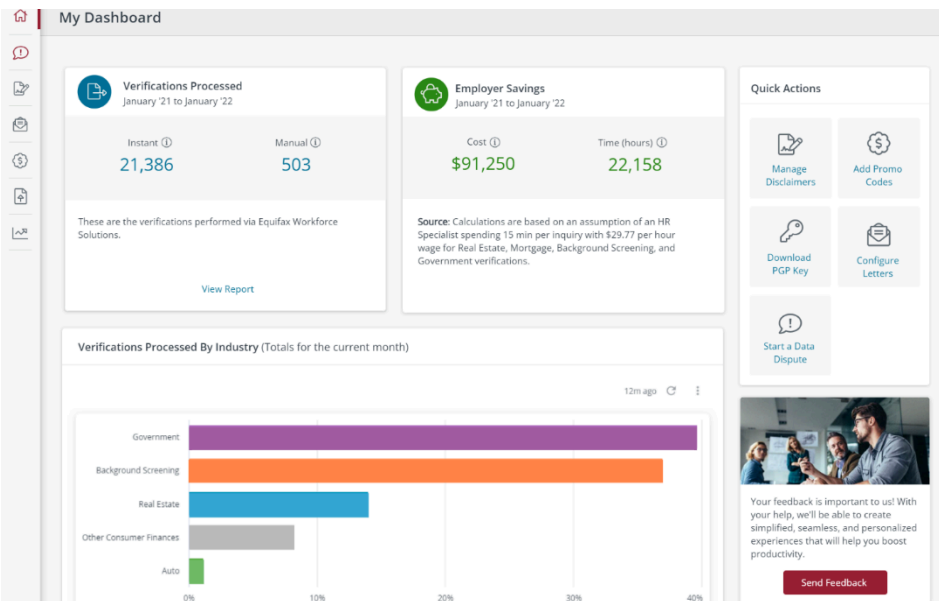
The **Verifications Processed** box shows a rolling twelve month total of both instant and manual verifications performed for your organization by Equifax Workforce Solutions. At the bottom of this box, there is a quick link to access your transaction reporting.





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.

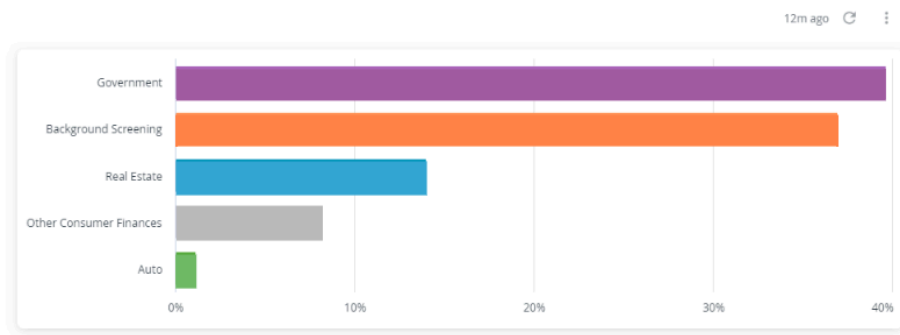
*Average HR Specialist salary in 2019 according to the US Bureau of Labor Statistics



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.

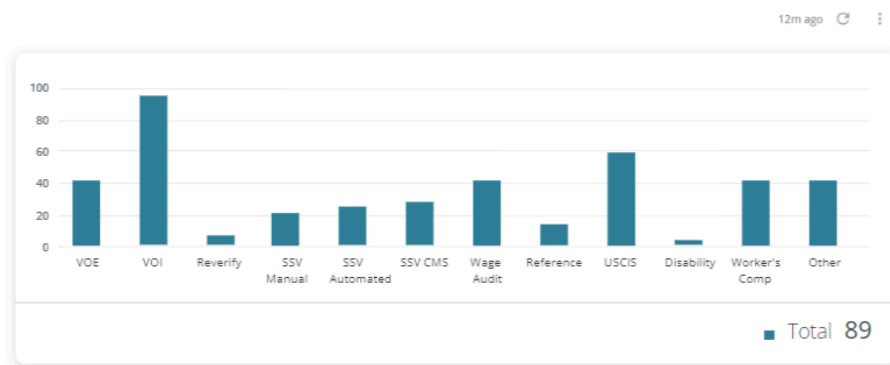
Verifications Processed By Industry (Totals for the current month)



12m ago

Powered by Locker

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



12m ago

Powered by Locker

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.

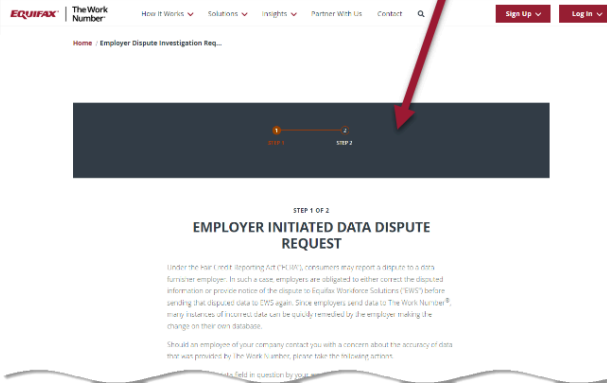
[Start a Data Dispute](#)

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.
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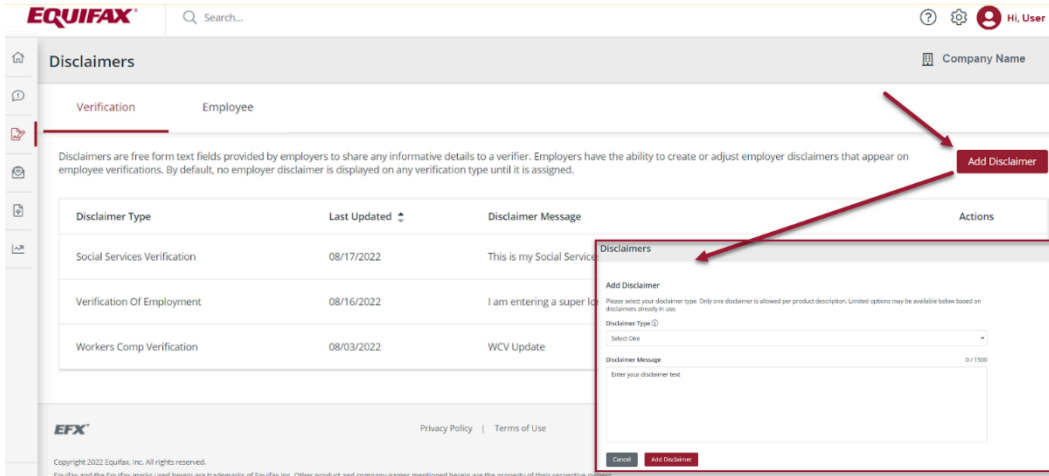
Disclaimers

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.

| Disclaimer Type | Last Updated | Disclaimer Message | Actions |
|------------------------------|--------------|---|---------|
| Social Services Verification | 08/17/2022 | This is my Social Services Disclaimer content | |
| Verification Of Employment | 08/16/2022 | I am entering a super long disclaimer so that we can t... | |
| Workers Comp Verification | 08/03/2022 | WCV Update | |



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.



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 Account 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 Employment, Letter of Income and Employment, Immigration Letter, or Public Service Loan Forgiveness Form, on theworknumber.com. This feature can help save your HR team valuable time while also providing a valuable service to your employees.

While Employment, Income and Employment, and Immigration letters are self-serve for the employee, if your company is configured for Remote Work letters, you can generate a letter for confirmation of remote work status and eligibility for an applicable employee. Remote Work letters can only be generated by an agent or admin in The Work Number Employer Portal.

To manage the letters that are currently available for your employees and to further configure the letters, select the Letters Center from the PeopleHQ menu. If you do not see all of these options and would like further information on how to take advantage of these letter features, reach out to your account executive.



Letters Center Company Name

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.

- Income & Employment**: Shows an employee's current income and employment status to provide proof to a third-party outside of requests from credentialed verifiers.
- Employment**: Shows an employee's current employment status and employment history to provide proof to a third-party outside of requests from credentialed verifiers.
- Immigration**: Can be used to show the U.S. Citizenship and Immigration Services or government embassies proof of employment and income for an employee.
- Public Service Loan Forgiveness**: Employees can show Public Service Loan Forgiveness (PSLF) eligibility with this form.
- Remote Work Letter**: Employers can generate this letter to provide to eligible employees who need to provide proof of remote work status.

Preview a letter by clicking on the eye icon next to that letter.

Configuring options include viewing or adding an employer disclaimer, and adding a signature. To configure the options for a letter, click on the pencil icon next to that letter. Once on the configuration screen, click on the dropdown arrow next to **Employer Logo** to view any employer logo that was uploaded. To upload or change an existing logo, please do so under organization settings. Click on the dropdown arrow next to **Employer Disclaimer** or **Signature** to update each accordingly.

Click on **Publish Changes** to save your changes or click on **Discard** to discard changes made.

Immigration Discard Publish Changes

Below is an example of this letter. You can customize the content of this letter in the configurations panel.

Configuration

- Employer Logo**: Shows the EQUIFAX logo. The logo above will appear on all of your letters.
- Employer Disclaimer**: A dropdown menu for selecting a disclaimer.
- Signature**: A dropdown menu for selecting a signature.
- Employer Disclaimer**: A text area for a custom disclaimer message. Last Updated: 05/14/2024. Disclaimer Message: 0/1500. Delete Disclaimer button.

Signature configuration message: There is no signature configured for your letters. You may upload a signature below, or we will show your organization's name in place of a signature. Upload Signature button.

Preview: Shows a draft of the letter with placeholders for [Employee Name], [Today's Date], [Employer Name], [Employer Address], and various employment details.

Please note that these documents are not suitable for use by lending institutions, credit agencies, pre-employment firms, property managers, or other private industry or social service agency entities who are determining an individual's eligibility for any employment, credit, governmental benefit, or other purposes authorized under the Fair Credit Reporting Act (FCRA). These letters do not comply with the underwriting requirements of Fannie Mae or Freddie Mac, nor do they satisfy other standards typically required for private industry and social service agency verifications. Please remind employees to send those verifiers to theworknumber.com.

For Public Service Loan Forgiveness, your organization's Federal Employer Identification Numbers (FEIN's) need to be set up and configured before employees will be able to generate the forms.

Click on the pencil icon for Public Service Loan Forgiveness.



Public Service Loan Forgiveness



Employees can show Public Service Loan Forgiveness (PSLF) eligibility with this form.

To add a new FEIN, click on **Add FEIN**.

Federal Employer Identification Number (FEIN) Management

Add FEIN

Federal Employer Identification Number

Friendly Display Name

Company

Street Address

City State ZIP

Cancel Add FEIN

| FEIN | Friendly Display Name |
|-----------|-----------------------|
| 500000906 | PT_Test6 |
| 500000905 | PT_Test5 |
| 500000904 | PT_Test4 |

| Status | Actions |
|---------------|---------|
| ✓ COMPLETED | ✎ ⌵ |
| ○ DEACTIVATED | ✎ ⌵ |
| ✓ COMPLETED | ✎ ⌵ |

- Federal Employer Identification Number
- Friendly Display Name (for employers with multiple FEIN's, this is helpful to the ensure the employee chooses the correct FEIN when generating their form)
- Company
- Street Address, City, State Zip

Click **Add FEIN**.



That new FEIN will show that Configuration is needed:

| | | | | |
|-----------|-------------------|--|----------------------|--|
| 570000921 | PT_Test21 | | CONFIGURATION NEEDED | |
| 570000919 | PT_Test19_Updated | | CONFIGURATION NEEDED | |

Click on the **pencil icon** next to the FEIN to configure further.

Use the **Form Fill Assistant** to copy the responses from an FEIN that has already been configured. Choose the FEIN from the drop down and click on **Copy Responses**. If you do not have an FEIN to copy, then complete the fields below.

Enter the **Employer Website** (optional) and the **Employer Certification** information including electronic signature. Once all the information is entered, click on **Publish Changes**. If you do not wish to save the changes made, click on **Discard**.

Public Service Loan Forgiveness Management
Company Name

Public Service Loan Forgiveness Form (PSLF)
You are responsible for modifying Sections 5A of this form in the configuration panel below. Section 1 will need to be completed by the employee.

Discard Publish Changes

Draft Preview
Live Version

Configuration

NOTE: PSLF is only available to full-time employees as defined by the Employee Eligibility section on page 7. The legal definition of full-time employee may differ from your company's definition of full-time.

Currently Editing: Test (234889374)

**PUBLIC SERVICE LOAN FORGIVENESS (PSLF)
& TEMPORARY EXPANDED PSLF (TEPSLF)
CERTIFICATION & APPLICATION**

**William D. Ford Federal Direct Loan (Direct Loan)
Program**

OMB No. 1845-0110
Form Approved
Exp. Date: 12/31/2026

WARNING: Any person who knowingly makes a false statement or misrepresentation on this form or on any accompanying document is subject to penalties that may include fines, imprisonment, or both, under the U.S. Criminal Code and 20 U.S.C. 1097.

Section 1: Borrower Information

Social Security Number (SSN):

Date of Birth:

Name:

Address:

City: State: Zip Code:

Telephone - Primary:

Email:

Form Fill Assistant ⌵

Copy Responses

Employer Website(optional)

Section 5A | Employer Certification ⌵

Official's Name

Official's Phone

Official's Title

Official's Email

Official's Signature

The electronic signature provided here will appear on the completed form. However, there may be times when data is not populated for certain fields and/or the employee decides to alter pre-populated fields when validating their information. When that occurs, the employer's electronic signature will be removed from the form and the employee will need to reach out to you, the employer, for a manual signature.

Please note: There are three ways employees can fill out the PSLF form in order to receive the benefit.

1. Employees can utilize the PSLF feature through The Work Number as mentioned above.
2. Employees can use the studentaid.gov website to print out the form.
3. Employees can use the studentaid.gov website to digitally fill out the form.

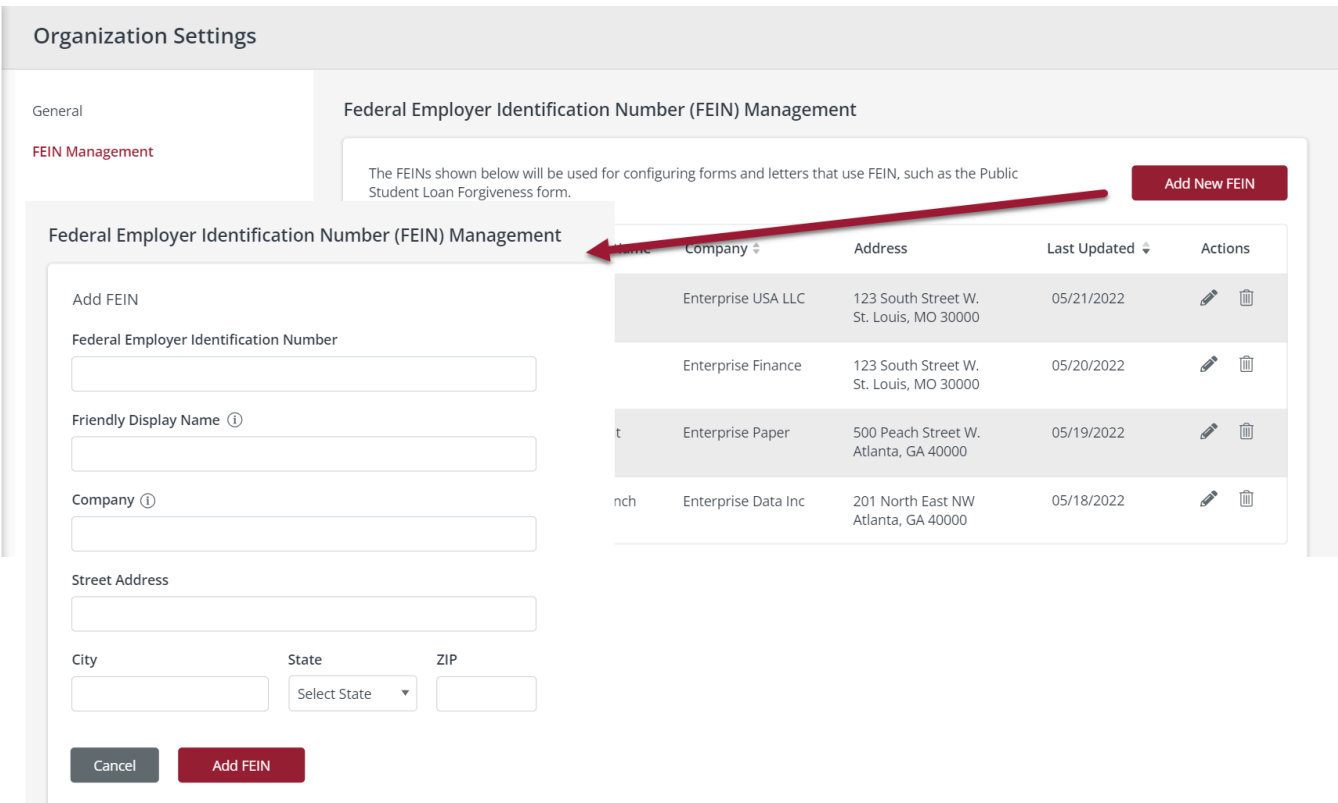
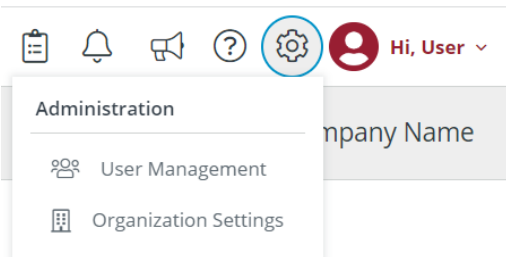


If the employee chooses to use the studentaid.gov site for completion of the form, the employee must engage the employer for either a wet signature or an electronic signature through DocuSign. If the employee is using the digital form, the employee should input an email address of an authorized signer at their employer in order to successfully complete the form. Employees should always send the form to their employer for an authorized signature. This is typically someone in Human Resources, not Equifax Workforce Solutions. Equifax Workforce Solutions is not authorized to provide a signature for these documents.

That FEIN is now configured and will be an option for the employee when they generate a PSLF form.

Adding new FEIN's or changing existing FEIN's names can also be performed in the **Organization Settings**.

Go to **Organization Settings** from the gear in the upper right corner.



Under the FEIN Management tab, click on **Add New FEIN** and provide the information requested:

- Federal Employer Identification Number
- Friendly Display Name (for employers with multiple FEIN's, this is helpful to ensure the employee chooses the correct FEIN when generating their form)
- Company
- Street Address, City, State Zip

Click **Add FEIN**.

To complete the configuration, go to the **Letters Center** as described above.

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.

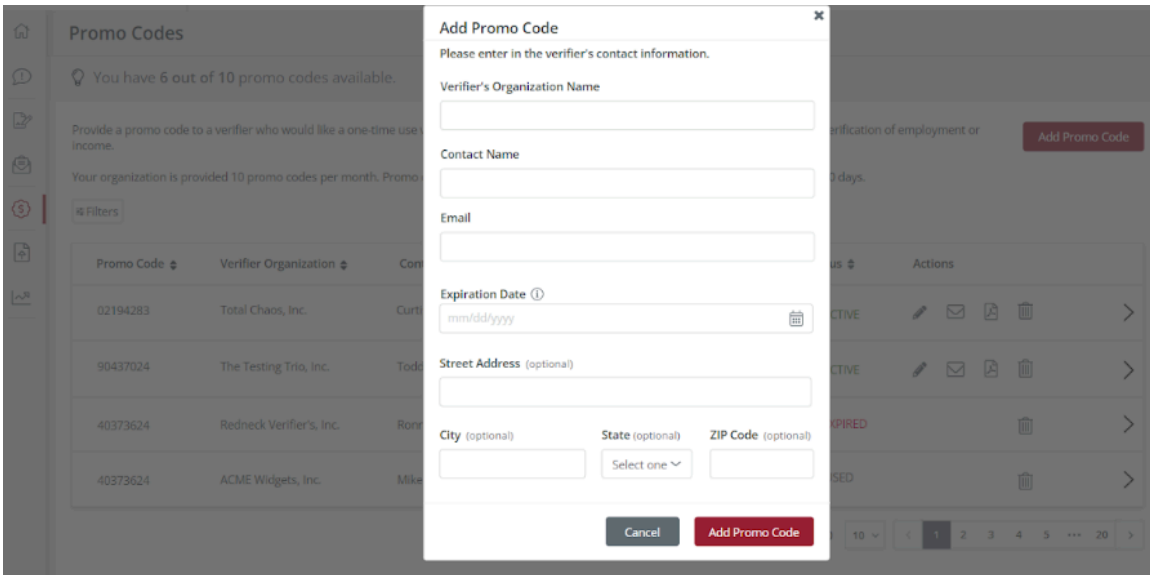
Filters

| 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 < 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.





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.
- **Sample Verification** - During the implementation process, sample verifications must be reviewed by employers ahead of going live with The Work Number. Sample verifications may also be used in other ongoing data quality testing scenarios as needed.
- **Employee Activation Report** - These reports provide insight into the successes and errors when loading your employees to The Work Number employee portal. Errors signify employees that will not be able to log in to the employee platform. Errors should be corrected in the employer's next file feed.

*Data is anonymized

Report Dashboard

Select a Report Type

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

| | | | |
|---|--|---|--|
| <p>Load Report</p> <p>View a load report of your most recent file import after it has downloaded to The Work Number.</p> <p>Category: The Work Number</p> <p>Generated in the last 7 days: 3 reports</p> | <p>Employer Summary</p> <p>View verification transactions by type for your organization broken down by day and division within a specific date range.</p> <p>Category: The Work Number</p> <p>Generated in the last 7 days: None</p> | <p>Employer Condensed Group</p> <p>View the total number of verification transactions by type across all divisions within a specific date range.</p> <p>Category: The Work Number</p> <p>Generated in the last 7 days: 1 report</p> | <p>Employer Group Report</p> <p>View the total number of verification transactions by type for your organization broken down by month and division.</p> <p>Category: The Work Number</p> <p>Generated in the last 7 days: 1 report</p> |
| <p>Sample Verification</p> <p>Download and review your organization's sample verifications and make sure they are accurate for The Work Number.</p> <p>Category: The Work Number</p> <p>Generated in the last 7 days: 3 reports</p> | <p>Employee Activation Report</p> <p>View the number of employee activation errors and successes when loading your employees to The Work Number employee portal.</p> <p>Category: The Work Number</p> <p>Generated in the last 7 days: 3 reports</p> | | |

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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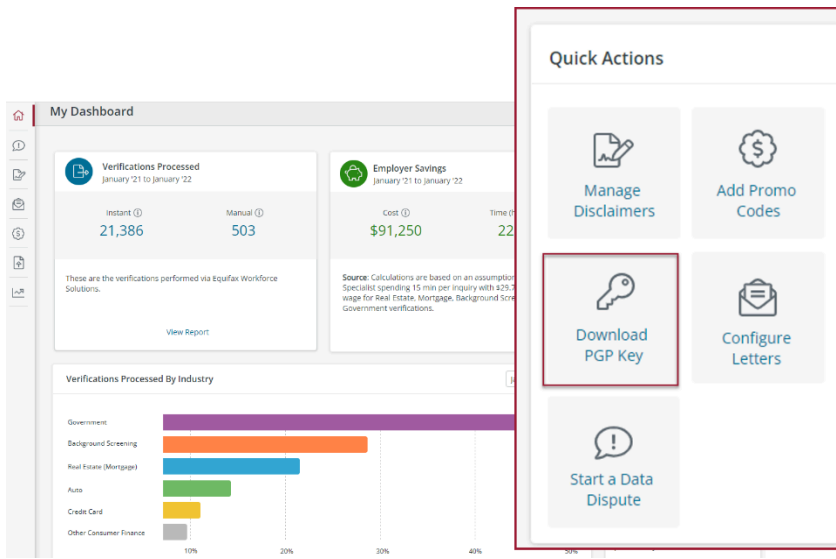


Download PGP Key

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>.



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.



Search employees...



My Dashboard



Verifications Processed

May '22 to April '23



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

- **Employee Record Status:** Help an employee to block or unblock their data from being accessed by verifiers.
- **Employee Portal Login Assistance:** Aid employees who are having trouble logging into The Work Number employee portal by unlocking their account and adding contact information as needed.
- **Create a Salary Key** on behalf of an employee - Newly created Salary Keys expire after 90 days.

Employee Profile Company Name

Profile **The Work Number®**

The Work Number®

Statuses

Employee Record Status
Block all verifiers from accessing the employee's records that come from the data supplied by this employer. Records from other employers will still be available for this individual unless the specific employer blocks them. Unblocked

Employee Portal Login Assistance
Unlock employee or add contact information to assist with logging into the employee portal.

Login Access Status LOCKED
Unlock Employee's Account

Contact Information Email and phone provided
View Contact Information

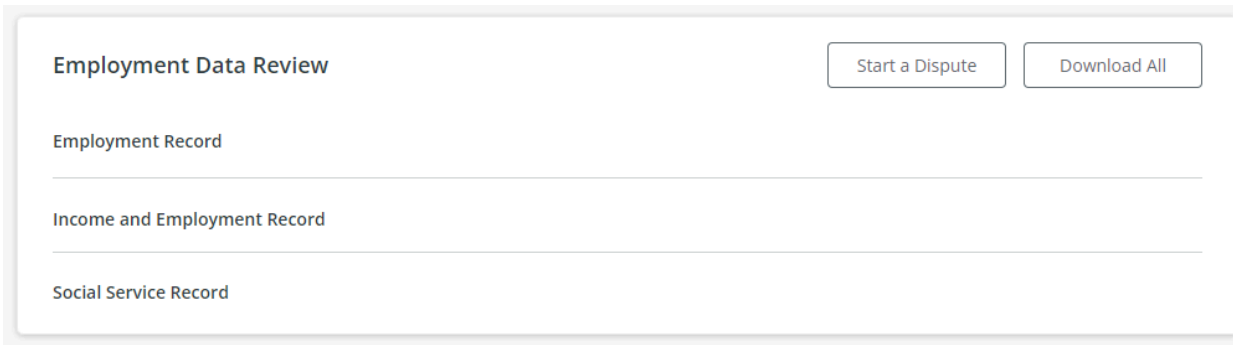
Salary Keys ¹

You may only have 3 active salary keys available for an employee, and they are only active for 90 days. Add Salary Key

There are currently no Salary Keys for this employee.
Once a Salary Key is added, it will be shown here.

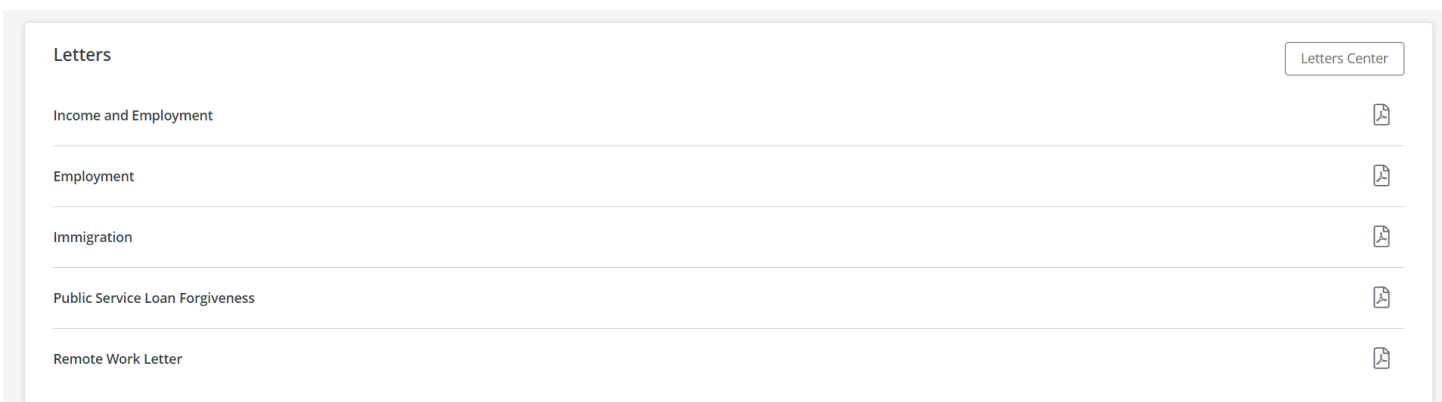
Continue to scroll down the screen and see the information related to your company presented on an employee's verification with **Employment Data Review**.





- 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.



Please note: If your organization is utilizing the Remote Work Letter functionality, employees are not able to self generate those letters. The TWN HR Admin will need to generate those letters through this screen.

Additionally, for Public Service Loan Forgiveness forms, when you click on the PDF icon, the system will walk you through the same steps that an employee goes through in generating that form. You will be asked to choose the FEIN (if your organization has multiple FEIN's) and confirm the accuracy of the employee information.

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.

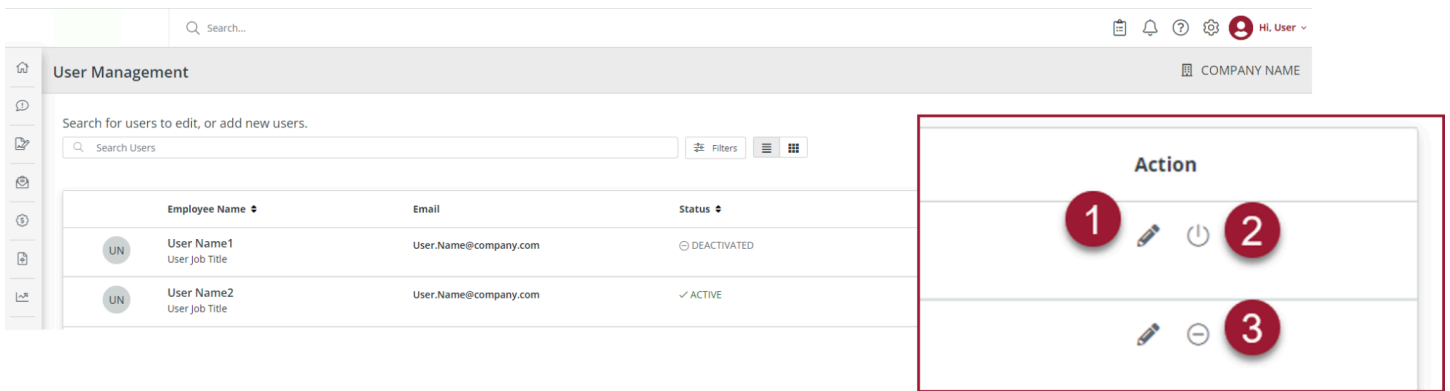
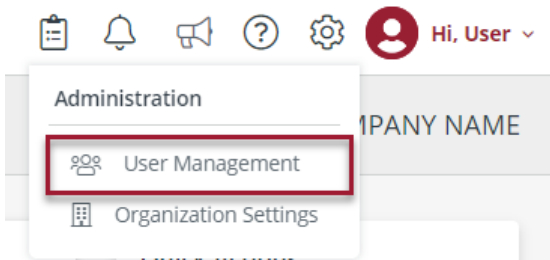


We suggest these be reviewed periodically by The Work Number administrators to ensure that all audiences are aware of The Work Number and its use by your organization. This helps ensure a more positive Work Number experience for everyone. (Link to Employer Communications - <https://theworknumber.com/employer-resources>)

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**.



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



← User Profile Company Name

UN
User Name
Job Title
✓ ACTIVE

✉ user.name@company.com
☎ (123) 456-7890

⊖ Deactivate

Profile **Permissions**

First Name: User
Last Name: Name
Job Title: Job Title
Phone: (123) 456-7890
Email: user.name@company.com

Date Created: 2022-09-06

← User Profile Company Name

UN
User Name
Job Title
✓ ACTIVE

✉ user.name@company.com
☎ (123) 456-7890

⊖ Deactivate

Profile **Permissions**

Manage Roles & Permissions Add Role
Below are the roles in use.

Role(s):
HR User
HR Users can perform all necessary functions to manage business processes.
Standard

Data Access Locations [Manage Locations](#)
All Locations

- 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 |
|---|--------------------------|----------|---------|-------------------------------|
| UN 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
User

Last Name
Name

Email
User.Name@company.com

Phone
(123) 456-7890

Job Title
Manager

Cancel Continue

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

Add User Company Name

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 User
The Work Number HR User role can perform all business process responsibilities. This role cannot view income or reports. You must assign a different role to the user if they need to view income or reports, or have admin privileges.

The Work Number® Income Viewer
The Work Number Income Viewer role can view employee income and perform all business process responsibilities. You must assign a different role to the user if they need to view reports or have admin privileges.

The Work Number® Report Viewer
The Work Number Report Viewer role can view all reports and perform all business process responsibilities. You must assign a different role to the user if they need to view income or have admin privileges.

Cancel Continue



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 Work Number® HR User role can perform all business process responsibilities. This role cannot view income or reports. You must assign a different role to the user if they need to view income or reports or have admin privileges. The Work Number® HR User functions include:

- View Employment Data Review Records (VOE)
- View Dashboard
- View Employment, *PSLF, *Remote Work Letters
- View Disclaimers
- View Disputes
- View Promo Codes
- View Salary Key

The Work Number® Report Viewer role can view all reports and perform all business process responsibilities. You must assign a different role to the user if they need to view income or have admin privileges. The Work Number® Report Viewer functions include:

- All 'HR User' functions
- View/Manage Employer Reports
- View Disputes
- Manage Load Reports
- Manage Dashboard Report Insights
- View verification transaction reports

The Work Number® Income Viewer role can view employee income and perform all business process responsibilities. You must assign a different role to the user if they need to view reports or have admin privileges. The Work Number® Income Viewer functions include:

- All 'HR User' functions
- View Employment, Employment & Income, and Social Service Data Review Records (VOE, VOI, SSV)
- View Employee Income



- Manage Employment Letter*
- Manage Employment & Income Letter*
- View Immigration Letter*

***Features vary per employer**

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® roles because they offer more options regarding assigning the features that a user can access. 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**.



⊖ Add User 🏠 Company Name

👤 Profile **⚙️ Permissions**

Assign Permissions
Select corresponding work locations for the user.

Assign Locations Assign Groups

State: Zip Code: Work Locations:

- Select All
- 99111 ST LOUIS
- 99111 ST LOUIS
- DEMO 1 St. Louis
- DEMO 10 St. Louis
- DEMO 10 St. Louis
- DEMO 100 St. Louis
- DEMO 100 St. Louis
- DEMO 100 St. Louis
- DEMO 11 St. Louis
- DEMO 11 St. Louis
- DEMO 12 St. Louis
- DEMO 12 St. Louis
- DEMO 13 St. Louis

Data Access Groups

Work Locations

99111 ST LOUIS ✕

Go Back **Save** < 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 Account 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.

The Work Number Solutions Support

Phone: 877-664-8778

Email: workforcesolutionssupport@equifax.com

Monday-Friday 8:00 AM-8:00 PM EST

Saturday 9:30 AM – 6:00 PM EST

Closed on the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, and Christmas.

