



Workforce
Solutions

5 Ways Employee Forms Can Impact The Employee Experience

(And some of the risks of getting
it wrong)

June 13, 2024



Thanks for joining our webinar



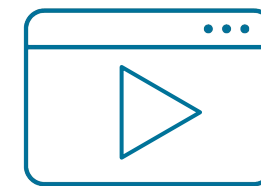
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Questions?

Please enter your questions in the chat box on your screen at any point during the presentation.



Recording

This webinar is being recorded. You will receive an email with a link to view the recording in the coming days.



To keep our lawyers happy



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Today's presenters



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Agenda

- 5 ways forms can impact your employee experience
- The snowball effect - what can happen when it goes wrong
- Tips for helping get it right

But wait, there's more....

- Live Q&A
- Polling/trivia questions
- How Equifax can help



Poll #1

How are you feeling about your employee forms processes?

- ☐ Feeling great. Fully automated, compliant, and ensuring good employee experiences.
- ☐ Feeling good. Think we have a pretty good system in place but always looking for ways to improve.
- ☐ Feeling okay. We're trying to keep up with all the changes but might be missing something.
- ☐ Feeling bad. There's just not enough time in the day to keep track of it all.
- ☐ Feeling awful. We need a complete overhaul of our employee forms processes.



5 Ways Forms Can Impact the Employee Experience



#1

Ways Forms Can Impact the Employee Experience

Onboarding forms sent in many
different packets and not all
together.



Can cause employee confusion, missed forms, and poor overall first impression.



#1

Forms Best Practice

Send forms all in one digital package.



More streamlined and easier to manage for your employees and your teams.



#2

Ways Forms Can Impact the Employee Experience

A Poorly Structured I-9 Workflow



A poorly structured I-9 workflow can potentially cause:

Frustration to new hires

Delays in start dates

Or in worst case scenarios, could possibly lead to unfair employment practice claims



#2

Forms Best Practice

I-9 Workflow Considerations



Capture all required information at once, communicate required deadlines, and set clear expectations for next steps

Special considerations for remote workers - how will document review occur?

If using E-Verify, need to be aware of unique rules/requirements

Have an standard operating procedure (SOP) which describes how an I-9 is initiated at your organization and rules for when an I-9 may not be required



#3 Ways Forms Can Impact the Employee Experience

Issues with Tax Withholding Forms

- If an employee fails to give you a properly completed Form W-4, you must withhold federal income taxes from his or her wages as if he or she were single or married filing separately¹
- If filled out incorrectly, there could be large tax consequences for the employee - and almost 30% of American taxpayers claim to have received an unusually large tax bill or refund in the last 3 years²
- **Financial stress can impact job performance**



80% of employers report that financial stress is impacting their employees' job performance, including increased stress, difficulty focusing, and missing work/tardiness³



#3 Forms Best Practice

Tax Withholding Ideas for Employers

- Employees should complete their W-4 before receiving their first paycheck to help ensure accurate tax withholding.¹
- Remind employees to check their withholdings at least once a year to make sure they are still up to date.
- The IRS requires employers to retain copies of W-4s for at least four years - and some states have additional requirements.²
- Don't forget about special purpose withholding forms like Exempt, Military, Military Spouse, Student, and Non-Resident
- Include these forms as part of your onboarding workflow



Nearly 45% of American taxpayers have no idea when they last updated their withholdings.³



#4

Ways Forms Can Impact the Employee Experience

**Not sending required state forms
for onboarding, annual notices, or
separation notices.**



Not sending forms or sending incorrect/outdated forms may impact the employee experience.



#4

Forms Best Practice

Have a process in place for all
required state forms.

Automate

Track
Changes

Be More
Audit
Ready



Trivia Question

How many states (including Puerto Rico) have an unemployment related offboarding separation notice?

- ☐ 11
- ☐ 17
- ☐ 22
- ☐ 27
- ☐ 38



#5

Ways Forms Can Impact the Employee Experience

Unorganized Offboarding Forms

#5

Forms Best Practice



Make Delivery of Offboarding Forms Easier

- 1** Have a consistent forms process throughout the employee lifecycle.

- 2** Deliver all your separation forms/paperwork in one digital packet.

- 3** Make sure state separation notices are sent within the required timeframes.

- 4** Be more audit ready and have your separation paperwork tracked digitally.

- 5** Communicate in the channel the employee prefers.



The Snowball Effect



Fines, Fines, and More Fines

Equal Employment Opportunity Commission (EEOC) complaints are on the rise and high-dollar labor and employment class action lawsuits seemingly pop-up weekly in the news.

\$665M

In 2023, the U.S. Equal Employment Opportunity Commission (EEOC) secured more than \$665M in monetary relief for more than 22,000 victims of employment discrimination, a 29.5% increase over fiscal year 2022¹

20,215

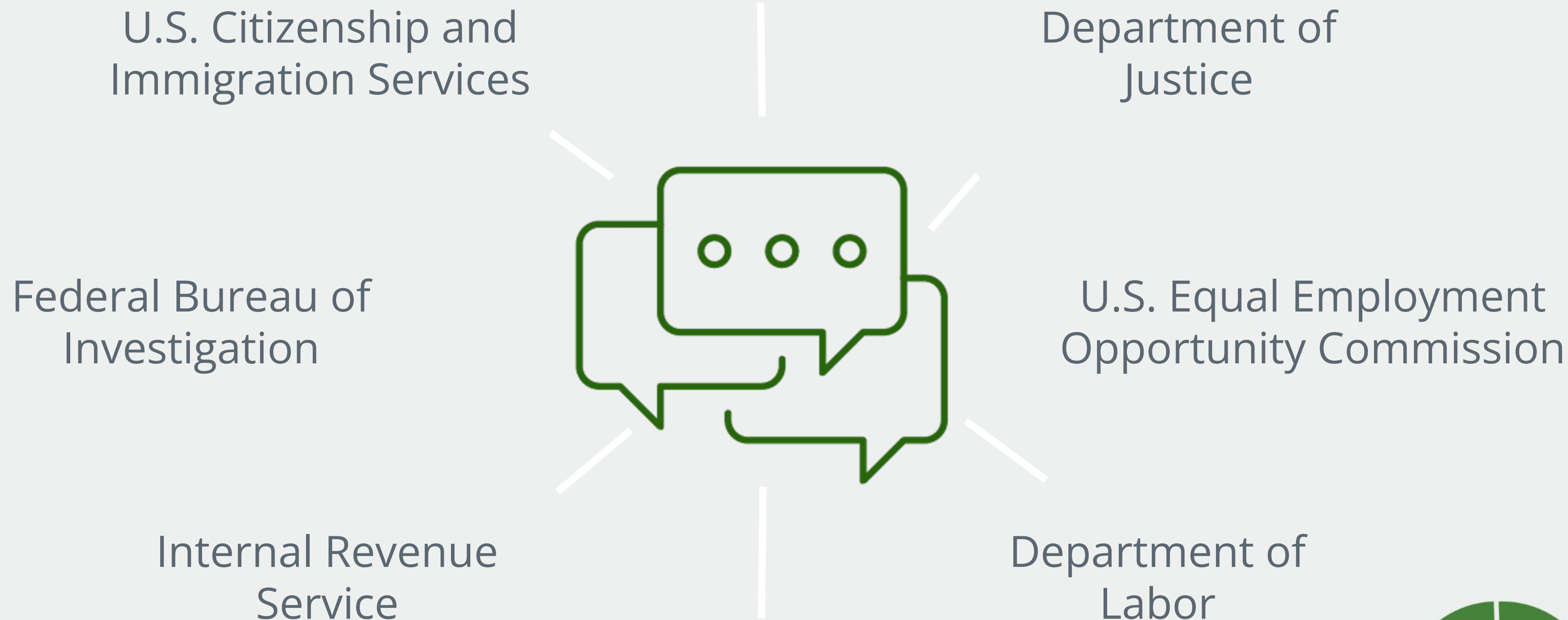
The U.S. Department of Labor (DOL) concluded 20,215 compliance actions in fiscal 2023²

\$5.7M

A staffing agency faces a potential penalty of \$5.7M for more than 2,000 alleged I-9 violations for failure to ensure proper completion of the I-9s, or, in the alternative, failure to prepare the I-9s³



Government Agencies May Talk To Each Other



Department of Justice (DOJ) Investigations

DOJ I-9 investigations typically begin based on employee complaints or referrals from other agencies

DOJ investigates 100% of claims received relating to unfair documentary practices¹

E-Verify can also refer cases to DOJ²

DOJ will also initiate investigations based on a pattern of practice of discriminatory conduct³

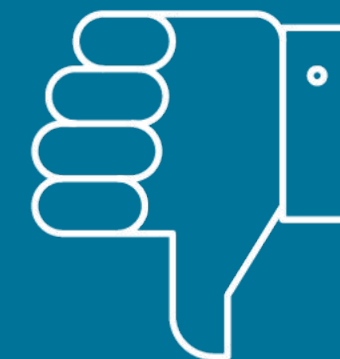
Discriminatory practices could also lead to investigation of other employee forms⁴



Employee Brand Impact

\$4,723

A poor reputation may limit a company's ability to attract valuable new and boomerang talent, **increasing costs per hire by \$4,723.**¹



Negative media attention can have an impact on your employee brand.

¹*Harvard Business Review*



Your Brand is Important

WHY?

73% of companies plan to grow in 2023.

They need high retention and for those who leave to be brand ambassadors¹

Employers are experiencing brand damage caused by backlash from vocal ex-employees²

A recent survey shows a **decline in remaining employee morale**²

Approximately ½ of corporate alumni maintain relationships with previous employers as clients, partners, or vendors, with 15% of new hires coming from alumni rehires and referrals³

¹Aspect43 Insights at Work Research, 2023

²Source: Harris Poll

³Alumni Report Benchmarking Survey, 2021. PeoplePath and Cornell University.



Tips for Getting it Right

Keep it electronic for easier tracking

Deliver all paperwork in one digital packet

Create repeatable processes

Focus on personalized experiences

Stay on top of changing regulations

Outsource to an expert

Over 60% of companies are looking to HR technology to improve the employee experience and to support the existing employees better. 80% want to streamline processes and gain more efficiency.*



How Equifax can help



EQUIFAX

Workforce
Solutions

Say Hello to More Streamlined Efficiency with Forms HQ

Forms HQ, a compliance-focused service within the PeopleHQ™ portal, can help you transform your employee forms experience - and help you reduce paper clutter and disjointed systems and say hello to more streamlined efficiency.

Forms HQ helps you:

Stay Compliance-Focused:

Keep up with changing regulations to help you get the right forms, to the right person, at the right time, and throughout the employee lifecycle.

Get Automated:

Help stay on top of your employee packets with configurable and automated actions to help you drive your workflows.

Keep it Easier:

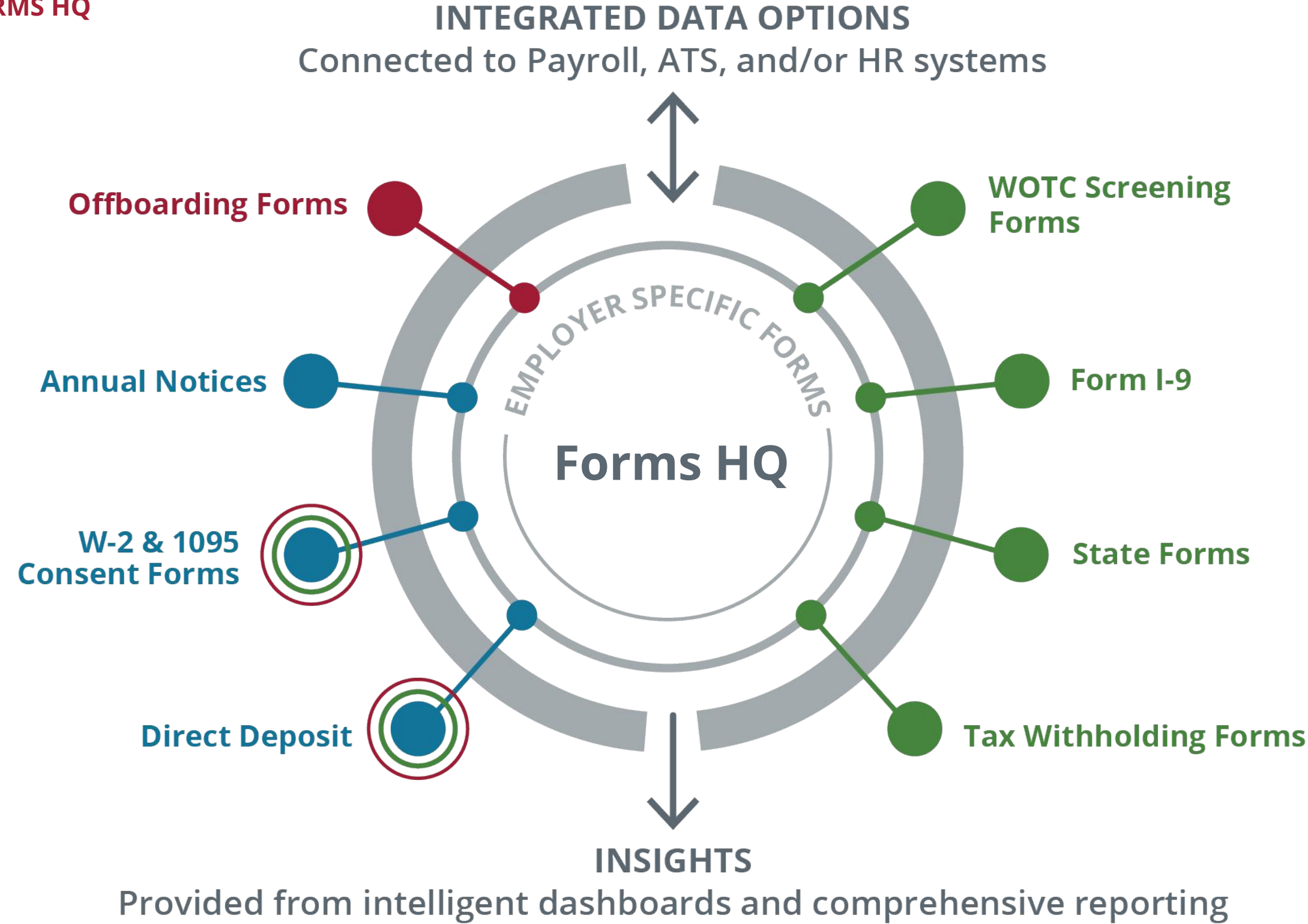
Make HR forms easier with integrations and self-service functionality. It's also easier for your employees with guided processes, chat, and more accessible design.

Reduce Your Risk:

Employees acknowledge notifications with electronic signatures, providing you with a more detailed audit trail.

Supported by a dedicated product support team and regulatory expertise.





Supporting
Your Workforce
Through
Solutions That
Work Together





Q+A

Next Steps



1 SURVEY

Complete the survey through the webinar console



2 CONTACT

Want to talk to someone about your onboarding or I-9 processes? Click on the “Want to Get In Touch” button on your webinar console or contact us at:

workforce.equifax.com/contact



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