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About This Job Aid

This job aid is designed to help USG web managers perform common tasks inside Compliance Center’s Web Manager view. Each job aid is tailored to a specific user role within the system and provides step-by-step instructions on tasks available to that role.

Be advised that business processes associated with Compliance Center that exist outside the system itself are considered out of scope for purposes of this document.

About This Role

The **HR View Only** User Role is a specialized role available to USG Institution staff. It is designed for an Institution’s distributed HR staff who need awareness of a new hire’s status as they progress through the onboarding process.

HR View Only includes a range of **Compliance Center** abilities, allowing it to search and view summaries of all new hires in their department(s).

HR View Only has no **I-9 Management** capabilities. It cannot search, view, or otherwise interact with Form I-9 information.

System Roles:
- HRXRole (Compliance Center): HRViewOnly
- UserRole (I-9 Management): None
- Locations: USG Institution Department(s) ONLY
Log in to Compliance Center

Access Compliance Center’s web manager interface using your Institution’s Single Sign On (SSO) credentials.

1. Go to the Compliance Center web manager URL:
   - https://federationx.talx.com/ClaimsAwareHelper/?whr=https://idpproxy.usg.edu/idp/shibboleth&wctx=HRXWebManager
2. Select your USG Institution from the USG Single Sign on Authentication page.
3. When prompted, enter your Institution SSO login and password.
4. Complete your institution’s two-factor authentication procedure.
5. You will be redirected to the red/gray Compliance Center web manager interface.
6. There are two main search features:
   a. Search Employee – locate a specific new hire
   b. Workflow Summary – view a summary of all packets within a date range

Notes:
- Users already logged into an authenticated SSO session with another OneUSG system (ex: OneUSG Connect) will skip steps 2-4.
- You will only see search results for new hires in your Location(s).
Search Employee

*Use search criteria to locate a new hire’s onboarding packet.*

1. Log in to Compliance Center
2. Click *Search Employees*
3. Enter search criteria:
   a. Last 4 of SSN
   b. First Name (partial values acceptable)
   c. Last Name (partial values acceptable)
4. Click *View*

**Search Employees**

<table>
<thead>
<tr>
<th>Last 4 of SSN</th>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

5. Search results will display the following:
   a. Name / Social Security Number: (last 4 digits only)
   b. Location / Position: (Institution or Department / STANDARD)
   c. Creation Method / Creation Date: Manual or Batch / Timestamp of packet creation
   d. Start Date / Status: (New hire start date / new hire’s current progress through onboarding process)

**Notes:**
- You will only see search results for new hires in your Location(s).
- New hire name / last 4 of SSN will display as a *different color* in search results if you have previously viewed them.
View Workflow Summary

View summary of all packets in your Location, by current Packet Status.

1. **Log in to Compliance Center**
2. **Click Workflow Summary**
3. **Enter Filter by criteria:**
   - **Workflow Date:** All packet states
   - **Creation Date:** Date of packet creation
   - **Start Date:** New hire start date
4. **Set Begin Date and End Date to refine search**
5. **Click View**
6. **Click green + to expand individual packet status**

Notes:
- You will only see search results for new hires in your Location(s).
**View Packet Information**

*View a summary of new hire employee information and packet information.*

1. **Search Employee or select new hire from Workflow Summary**
2. Click name / last 4 of SSN of new hire
3. **Packet Information** tab will display by default
   a. **Employee Info:**
      i. Login ID: system-generated new hire login for Employment Center
      ii. Social Security Number: last 4 digits only
      iii. Full Name: From Create Packet process or Personal Information document
      iv. Street Address: From Create Packet process or Personal Information document
      v. Telephone Number: From Create Packet process or Personal Information document
      vi. E-mail Address: From Create Packet process or Personal Information document
      vii. Location: Institution or department name. From Create Packet process
      viii. Position: will always show as STANDARD
      ix. Hire Type: New hire packet template. From Create Packet process.
      x. Start Date: New hire start date. From Create Packet process.
   b. **Packet Info:**
      i. Creation Date: Timestamp of packet creation.
      ii. Created By: Name of web manager who created packet
      iii. Creation Method: Manual or Batch
      iv. Workflow State: New hire’s progress through onboarding process
      v. Tax Credit Eligibility
      vi. I-9 Status
Notes:
- You will only see search results for new hires in your Location(s).
- All system timestamps are in Central Standard Time (CST)
View Documents

View a summary of new hire employee information and packet information.

1. Search Employee or select new hire from Workflow Summary
2. Click name / last 4 of SSN of new hire
3. Packet Information tab will display by default
4. Click Documents tab
   a. Forms
      i. Each form in the onboarding packet is listed
      ii. Number of forms is dependent on packet type
      iii. Number of forms is also dependent on new hire’s status
          • Citizenship
          • Tax status
   b. Completion
      i. EC = Completed by employee
         • Unchecked box indicates form has not been completed
         • Checked box indicates form has been completed
      ii. MC = Completed by GTHR Customer Service Center
         • Unchecked box indicates form has not been completed
         • Checked box indicates form has been completed
   c. Action
      i. View button – Results in error message as you are not authorized to view the completed document
Notes:
- You will only see search results for new hires in your Location(s).
- All system timestamps are in Central Standard Time (CST)
View Activities

View a chronological list of actions taken by the new hire (or the system) on an onboarding packet. Useful for troubleshooting.

1. View Packet Information
2. Click on Activities
3. Activities Log will display the following:
   a. Activity:
      i. A system-generated event, usually an email notification to the new hire
      ii. An action taken by the new hire, usually completion of an onboarding document
   b. User:
      i. <blank> for system activity
      ii. First Name / Last Name for new hire activity
   c. Date / Time: (CST)
Notes:
- You will only see search results for new hires in your Location(s).
- All system timestamps are in Central Standard Time (CST)
View Workflow History

View a chronological list of workflow states. This list is updated whenever a state is changed. Useful for troubleshooting / audits.

1. View Packet Information
2. Click on Workflow History
3. Workflow History will display the following:
   a. Previous Workflow State
      i. The “Before” state
   b. Event
      i. The “After” state
   c. User:
      i. System for system activity (usually triggered by new hire completing documents)
      ii. First Name / Last Name for Web Manager hire activity
   d. Date / Time: (CST)

Notes:
- You will only see onboarding documents available to your specific User Role.
- All system timestamps are in Central Standard Time (CST)
Support Model Overview

As part of the OneUSG Careers project, Compliance Center has multi-tier support model, involving staff from USG Institutions, the Shared Services Center, ITS, and Equifax. This section outlines the different levels of the support model and their high-level support responsibilities.

- **Institution HR Practitioners**
  - a.k.a. Institution Web Managers
  - Supports Institution’s New Hires
  - Creates / cancels new hire packets
  - Changes new hire passwords
  - Resends new hire email invitations
  - Views documents / completes data entry
  - Completes Form I-9

- **Tier 1 (Shared Services Center)**
  - Supports Institution HR Practitioners
  - Escalates issues to Tier 2

- **Tier 2 (Shared Services Center Security Admins)**
  - Creates Web Managers
  - Sets Web Manager Location
  - Sets Web Manager User Roles
  - Revoke Web Manager access

- **Tier 3 (ITS Admins)**
  - Supports Institution Web Managers + SSC
  - Technical issues
  - Escalates to Tier 3 (Equifax)
  - Liaises with Equifax on:
    - document, packet changes
    - New / custom documents
    - system issues

- **Vendor Support (Equifax)**
Support Resources

- **Contact the USG Shared Services Center**
  - oneusgsupport@usg.edu
  - 1-877-251-2644
  - [https://www.usg.edu/shared_services_center/](https://www.usg.edu/shared_services_center/)

- **Equifax Workforce Solutions Status Page**
  - Provides up to date system status information for Equifax services, including Compliance Center
  - [https://status.equifaxworkforce.com/](https://status.equifaxworkforce.com/)

- **Equifax I-9 Video Tutorials**
  - How to Request I-9 Reports
    - [https://www.i9express.com/demos/i-9-reports-training-module](https://www.i9express.com/demos/i-9-reports-training-module)
  - How to Complete Section 2 Using a Pending Record
    - [https://www.i9express.com/demos/section-2-training-module](https://www.i9express.com/demos/section-2-training-module)
  - How to Reverify an Employee Using Section 3
    - [https://www.i9express.com/demos/section-3-reverification-training-module](https://www.i9express.com/demos/section-3-reverification-training-module)
  - How to Update an Employee's Name or Enter a Rehire Date Using Section 3
    - [https://www.i9express.com/demos/section-3-name-change-and-rehire-training-module](https://www.i9express.com/demos/section-3-name-change-and-rehire-training-module)
  - How to Update a Receipt Due
    - [https://www.i9express.com/demos/i-9-management-receipt-due](https://www.i9express.com/demos/i-9-management-receipt-due)
  - E-Verify Overview
    - [https://www.i9express.com/demos/what-is-everify](https://www.i9express.com/demos/what-is-everify)
  - Common E-Verify Responses
    - [https://www.i9express.com/demos/common-e-verify-responses](https://www.i9express.com/demos/common-e-verify-responses)
  - Additional E-Verify Responses
    - [https://www.i9express.com/demos/additional-e-verify-responses](https://www.i9express.com/demos/additional-e-verify-responses)