UNIVERSITY SYSTEM OF GEORGIA

Organizational Effectiveness

OneUSG Careers
Compliance Center Job Aid
HR View Only v1.1B

Table of Contents

About This Job Aid 3
About This Role 3
Log in to Compliance Center 4
Search Employee 5
View Workflow Summary 6
View Packet Information 7
View Documents 9
View Activities 11
View Workflow History 13
Support Model Overview 14
Support Resources 15

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.

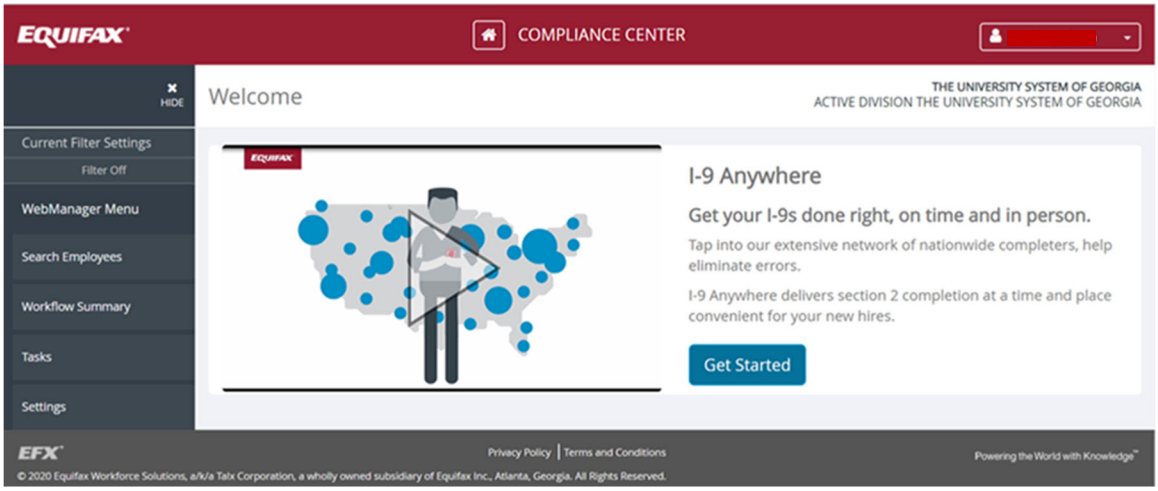
System Roles:

- 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



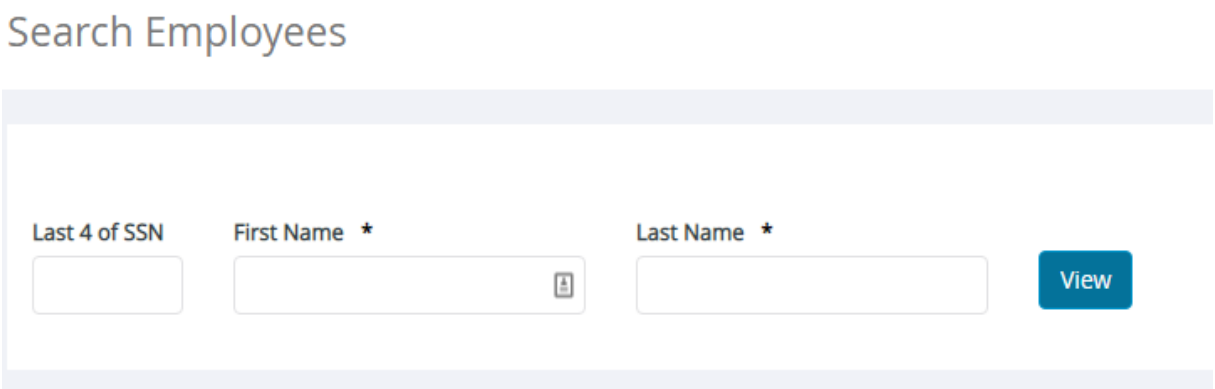
Notes:

- 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).

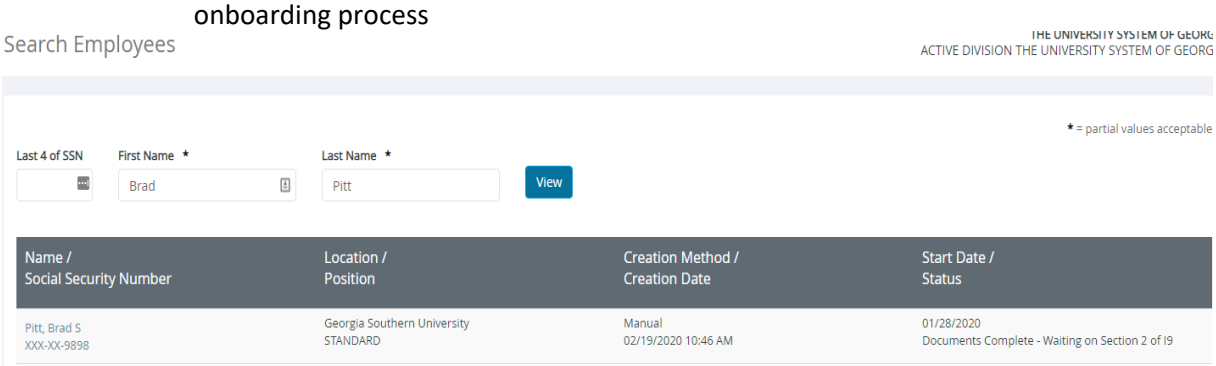
Search Employee

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**



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



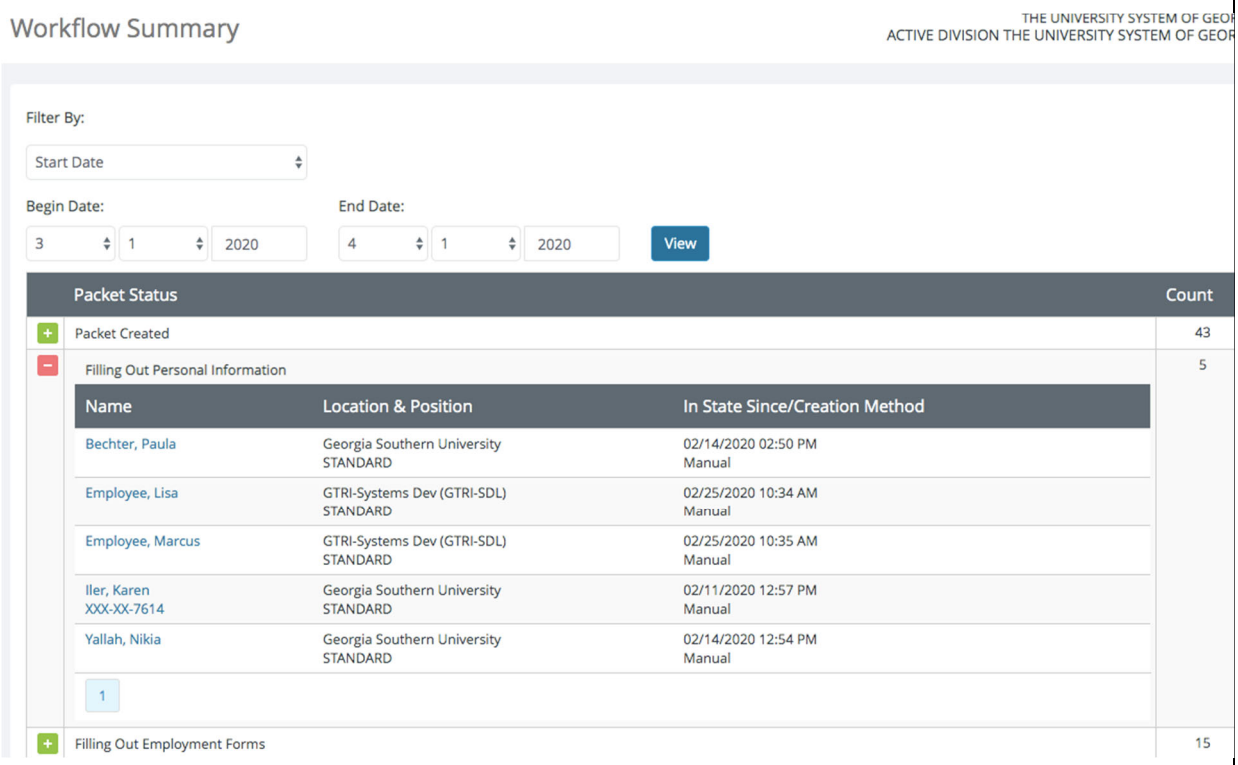
Notes:

- 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**:**
    a. **Workflow Date:** All packet states
    b. **Creation Date:** Date of packet creation
    c. **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

PITT, BRAD

Packet Information | Documents | Attachments | Tasks | Notes | Workflow History | Activities

Reference ID	1520333

Employee Info

Login ID	brpitt
Social Security Number	XXX-XX-9898
Full Name	PITT, BRAD
Street Address	123 Test ATL, GA 30303
Telephone Number	(404) 888-9988
E-mail Address	@usg.edu
Location	Engineering, College of
Position	STANDARD
Hire Type	GT - Employee
Start Date	1/28/2020

Packet Info

Creation Date	1/29/2020 3:40 PM

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

PITT, BRAD

Return to S

Packet Information | Documents | Attachments | Tasks | Notes | Workflow History | Activities

EC=Employee Completed, MC=Manager Completed

	EC	MC	Action
Personal Information	☑		View
Emergency Contact	☑		View
I9	☑	☐	View
Direct Deposit	☑		View
Equal Employment Opportunity	☑		View
Tax Withholding Forms	☑		
W4 w4101-.pdf			View
GA ga101-.pdf			View
Voluntary Self-Identification of Disability	☑		View
Security Questionnaire	☑		View
Intellectual Property Agreement	☑		View
Foreign National (GLACIER)	☑		View
Worker's Compensation	☑		View
Affordable Care Act	☑		View

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)

PITT, BRAD

Packet Information | Documents | Attachments | Tasks | Notes | Workflow History | Activities

Activity	User	Date/Time
"Further Action is Required" Employee Email Sent to vamshi.madadi@usg.edu		2/28/2020 11:45 AM
General Data Protection Regulation (GDPR) Saved	BRAD PITT	2/28/2020 11:38 AM
Onboarding Documents Complete Saved	BRAD PITT	2/28/2020 11:38 AM
Retiree Status Saved	BRAD PITT	2/28/2020 11:38 AM
Benefits and Retirement Saved	BRAD PITT	2/28/2020 11:37 AM
Computer Use Policy Saved	BRAD PITT	2/28/2020 11:37 AM
Data Access Policy (FERPA, GLBA, HIPAA) Saved	BRAD PITT	2/28/2020 11:37 AM
General Work Rules Saved	BRAD PITT	2/28/2020 11:37 AM
Policy on Alcohol and Other Drugs Saved	BRAD PITT	2/28/2020 11:37 AM
Right to Know Saved	BRAD PITT	2/28/2020 11:37 AM
Two-Factor Authentication Saved	BRAD PITT	2/28/2020 11:37 AM
Affordable Care Act Saved	BRAD PITT	2/28/2020 11:36 AM
Family Medical Leave Act Saved	BRAD PITT	2/28/2020 11:36 AM
Georgia Defined Contribution Plan (GDCP) Saved	BRAD PITT	2/28/2020 11:36 AM
Motor Vehicle Records Saved	BRAD PITT	2/28/2020 11:36 AM
Non-Discrimination and Anti-Harassment (NDAH) Policy Saved	BRAD PITT	2/28/2020 11:36 AM
University System of Georgia Ethics Policy Saved	BRAD PITT	2/28/2020 11:36 AM
Workplace Violence Policy Saved	BRAD PITT	2/28/2020 11:36 AM
Foreign National (GLACIER) Saved	BRAD PITT	2/28/2020 11:35 AM
Intellectual Property Agreement Saved	BRAD PITT	2/28/2020 11:35 AM
Security Questionnaire Saved	BRAD PITT	2/28/2020 11:35 AM
Worker's Compensation Saved	BRAD PITT	2/28/2020 11:35 AM
Tax Withholding Forms Saved	BRAD PITT	2/28/2020 11:34 AM

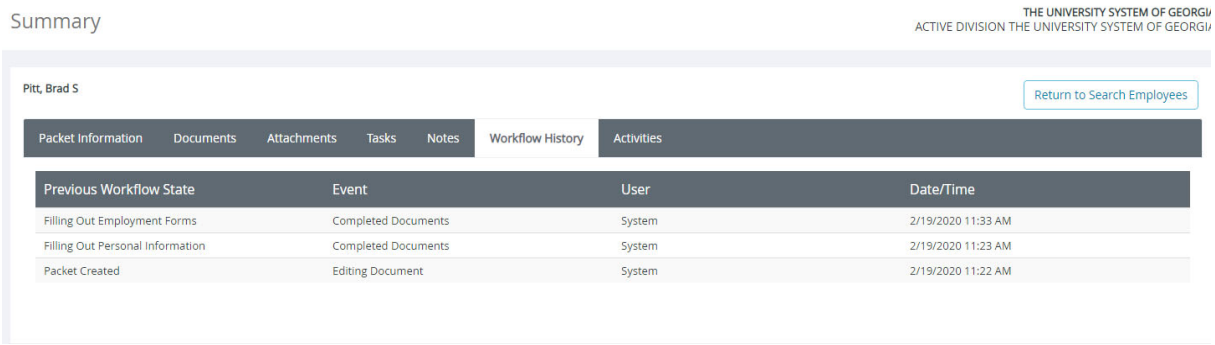
Notes:

- 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)

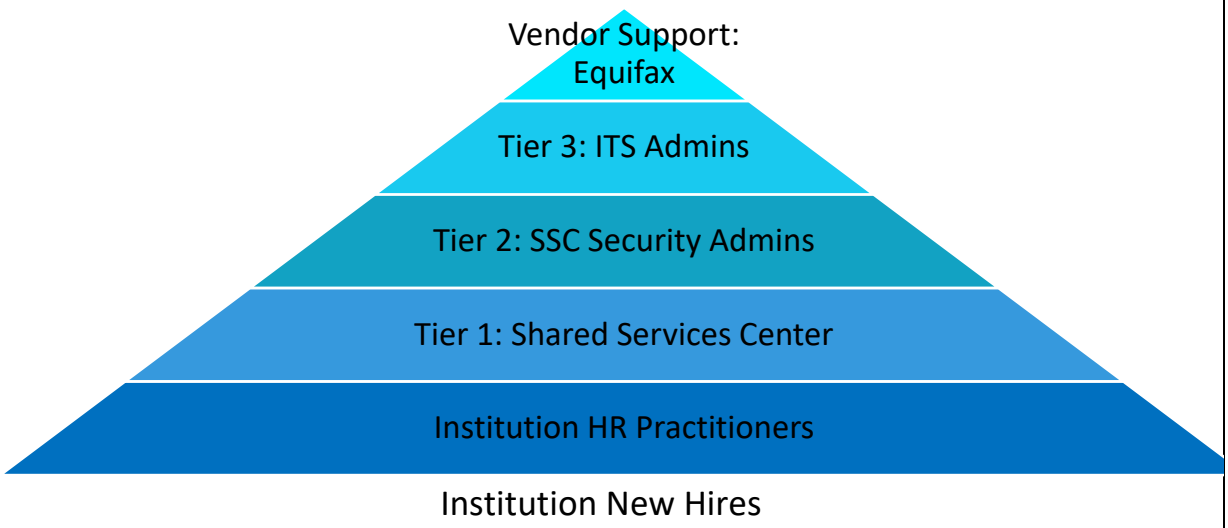


Notes:

- 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)**

- Supports ITS Admins
- Deletes WebManagers / Changes UserID
- Creates new documents/packets/etc
- Edits existing documents
- Resolves major technical/system issues
- Maintains / upgrades system
- Onboards new USG Institutions

Support Resources

- **Contact the USG Shared Services Center**
  - oneusgsupport@usg.edu
  - 1-877-251-2644
  - 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/
- **Equifax I-9 Video Tutorials**
  - **How to Request I-9 Reports**
    - 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
  - **How to Reverify an Employee Using Section 3**
    - 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
  - **How to Update a Receipt Due**
    - https://www.i9express.com/demos/i-9-management-receipt-due
  - **E-Verify Overview**
    - https://www.i9express.com/demos/what-is-everify
  - **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