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*Compliance Center Job Aid – HR View Only*
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 has a narrow 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
- Location: USG Institution Department(s) ONLY

What’s New in This Version (v1.3)

- Updated Log in to Compliance Center notes to include new TEST / bookmark instructions
- Removed View Workflow Summary
  - This skill was enhanced to provide unredacted new hire SSN access to other user roles.
  - For security purposes, it has been removed from the HRViewOnly user role
  - Individual new hire packets for your location accessible via Search Employee
- Updated Support Resources to remove Additional I-9 Training Links
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://federation.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 automatically redirected to the Compliance Center Web Manager Welcome Page.

Notes:

- Users already logged into an authenticated SSO session with another OneUSG system (ex: OneUSG Connect) will skip steps 2-4.
- Link to TEST environment:
  - https://hrxtest2.talx.com/HRX/webmanager/LoginClientKey.aspx
  - Use Employer Code 21477
  - User your UserID and PIN from your Web Manager training
  - Be advised that weekly TEST environment maintenance occurs MWF 11:00am-1:00pm. System performance may be impacted during this time.
- To bookmark Compliance Center for future reference, be sure to create a new bookmark in your browser while logged out of any OneUSG system!
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 Packet Summary

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

1. Search Employee
2. Click name / last 4 of SSN of new hire
3. Packet Summary 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 hires’ progress through onboarding process
         1. Packet Created – Compliance Center has created the packet, but the new hire has not completed any onboarding documents.
         2. Filling Out Personal Information – The new hire has successfully logged in to Employment Center, but has not completed the initial Personal Information document.
         3. Filling Out Employment Forms – The new hire has completed their Personal Information document, but hasn’t finished all the onboarding documents in their packet.
         4. Documents Complete – Waiting on Section 2 of I9 – The new hire has completed their onboarding packet.
         5. Hired – An Institutional HRStaff user has completed Section 2 of Form I-9 for the new hire.
         6. Packet Cancelled – A Web Manager has manually changed the status of the packet to Cancelled (typically because the hiring process was terminated or the packet was created by mistake)
         7. Packet Expired – Packet not completed within 180 days of creation date
         8. Empty Packets – A non-viable packet was created via Batch process. This is usually because the packet created is missing one or more pieces of required data (Start Date, Hire Type, etc.)
   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 Activities Log

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

1. View Packet Summary
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 onboarding documents available to your specific User Role.
- 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 Summary
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/](https://www.usg.edu/shared_services_center/)

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

- **Workforce Solutions Support SLAs (only applicable if issue is escalated to Equifax)**
  - **1 business day or less:** system is inoperable
  - **2 business days or less:** Issues with multiple users with workaround available
  - **3 to 5 days:** General questions, data/login investigation, adding Locations
  - **6 to 30+ days:** Minor functionality impaired, custom forms, enhancement requests