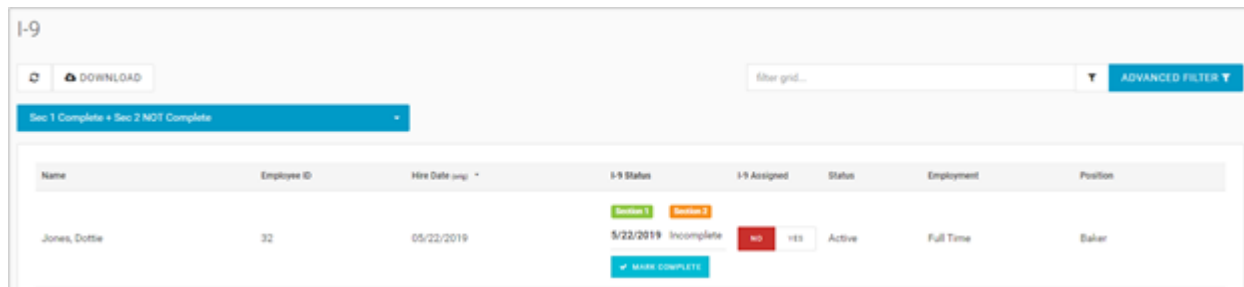


## I-9 Screen in Advanced HR 2.0

The I-9 screen is the standalone electronic I-9 process. The I-9 screen allows HR staff to update and e-sign the employer portion of the I-9 form. The I-9 screen lists all the employees for the company and indicates their I-9 Status. The employer has full control as to when to allow employees to be able to access their I-9 Form.



Name	Employee ID	Hire Date <small>avg</small>	I-9 Status	I-9 Assigned	Status	Employment	Position
Jones, Dottie	32	05/22/2019	<span>Section 1</span> <span>Section 2</span> 5/22/2019 Incomplete	<span>NO</span> <span>YES</span>	Active	Full Time	Baker

All the I-9 information is stored on the employee record itself.

- The employee self onboards and completes **Section 1** of the I-9
- Admins/Managers cannot do anything with **Section 1**, other than marking it (manually) as **Complete/Incomplete** and Assigning it to the employee. By “assigning it”, it displays for the Employee to do, fix, update, or complete Section 1 (also assuming it is not marked as **Complete** already).
- Similarly, employee (self service) cannot access Section 2 of the I-9. Section 2 is only accessible for the Admins / Managers and for Section 2's that are not already complete.

To access the **employer portion** of the I-9 screen:

1. Go to **HR-Admin – Employee Maintenance – I-9**.
2. The system displays the **I-9** screen.

I-9

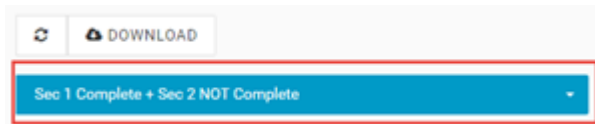
DOWNLOAD

filter grid... ADVANCED FILTER

Sec 1 Complete + Sec 2 NOT Complete

Name	Employee ID	Hire Date	I-9 Status	I-9 Assigned	Status	Employment	Position
Jones, Dottie	32	05/22/2019	Section 1: 5/22/2019 Incomplete Section 2: <input checked="" type="checkbox"/> MARK COMPLETE	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	Active	Full Time	Baker
Blaine, Betty	23	01/29/2019	Section 1: 1/29/2019 Incomplete Section 2: <input checked="" type="checkbox"/> MARK COMPLETE	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	Active	Full Time	Front Desk
White, Collin	21	01/02/2019	Section 1: 12/26/2018 Incomplete Section 2: <input checked="" type="checkbox"/> MARK COMPLETE	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	Active	Full Time	Front Desk
Marks, Jefferson	10	06/18/2018	Section 1: 6/26/2018 Incomplete Section 2: <input checked="" type="checkbox"/> MARK COMPLETE	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	Active	Full Time	Mechanic

The filter at the top left of the I-9 screen allows the Admin/Manager to filter the types of I-9 Status to show.



You can select the following views:

- All Sec 1 + Section 2 Status
- Sec 1 NOT Complete
- Section 1 Complete + Section 2 Not Complete - this is the default view but you can change it

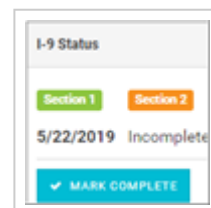
### I-9 Assigned Field

You can use the **I-9 Assigned** column field to open the **Section 1** of the I-9 Form in order for the employee to do something to their I-9, for example if the employee didn't fill out the I-9 during onboarding. In the **I-9 Assigned** column – change the **Yes / No** toggle switch from **No** to **Yes** to assign the I-9 task to the employee. The system assigns the I-9 to the employee and sends an email to the employee indicating a request to go fill out or complete their I-9 document which includes a link for the employee to click – a sample email notification is shown below.

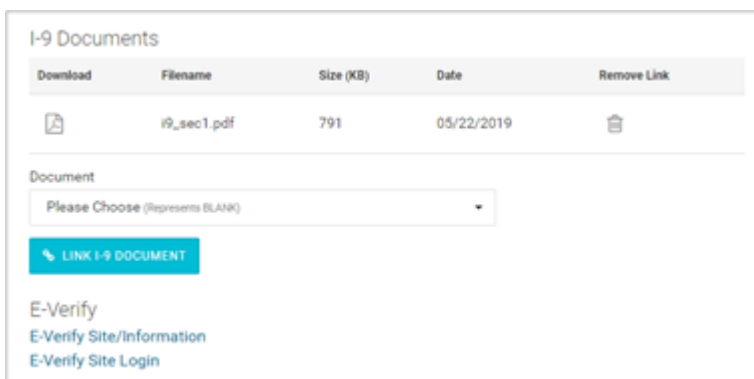


To do this, you **also need to change the Status** of the I-9 from **Complete** to **Not Complete** in order to be able to assign a completed I-9 back to the employee. You can do this manually, in the I-9 Status/Dates section of the screen, in the **Mark** column, by clicking on the Thumbs Up/Down icons to mark it as **Not Complete** (or click on the Thumbs Up/Down icons to mark it as **Complete**).

Name	Employee ID	Hire Date (orig. *)	I-9 Status	I-9 Assigned	Status	Employment	Position
Jones, Dottie	32	05/22/2019	Section 1 Section 2 5/22/2019 Incomplete	NO YES	Active	Full Time	Baker



The top section of the I-9 screen contains the employee I-9 information, links to the I-9 Instructions and to E-Verify and to the physical I-9 Documents which you can click on such as the actual I-9 Section 1 portion that the employee completed.



## I-9 Section 1

The employee completes Section 1 of the screen. The employer does not have access to Section 1.

## Section 1. Employee Information and Attestation

(Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)

### Name/Address

Last Name (Family Name)\*

Jones

First Name (Given Name)\*

Dottie

Middle Initial

N/A

Other Last Names Used (if Any)

N/A

Address (Street Number and Name)\*

123 Main St

Apt. Number

N/A

City or Town\*

Burlington

State\*

VT - VERMONT, US


ZIP Code\*

21654

### ID/Contact

Date of Birth (mm/dd/yyyy)\*

01/01/1990

U.S. Social Security Number 

654-78-9123

Employee's E-mail Address

your.email@domain.com

Employee's Telephone Number

123.456.7890 x123

### Status

A citizen of the United States

NO

YES

A noncitizen national of the United States (See instructions)

NO

YES

Lawful permanent resident

NO

YES

USCIS #

N/A

Alien Registration #

N/A

Alien authorized to work. Some aliens may write "N/A" in the expiration date field. (See instructions)

NO

YES

USE ONE SECTION

Work Expiration Date

Work Expiration Date

OR

Form I-94 Admission #

N/A

OR

Foreign Passport #

N/A

USCIS #

N/A

Country Of Issuance

N/A - N/A

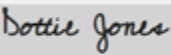
Alien Registration # (should start with "A")

N/A

### E-Signature

Type your name here\*

Dottie Jones



Today's Date (mm/dd/yyyy)\*

05/22/2019

Preparer and/or Translator Certification

Did a preparer and/or translator assist the employee in completing Section 1 ?

NO

YES

## I-9 Section 2

The common workflow is the Admin/Manager will display the **Section 2** section of the I-9 screen to complete the

employer portion. The employee does not have access to Section 2. The screen mimics the online Smart I-9 Form.

**Section 2. Employer or Authorized Representative Review and Verification**  
*(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")*

Employee Info from Section 1

Last Name (Family Name)* Jones	First Name (Given Name)* Dottie	M.I.* N/A	Citizenship/Immigration Status* A citizen of the United States
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<b>List A Identity and Employment Authorization</b> Document Title Please Choose (Represents BLANK)	<b>List B Identity</b> Document Title Please Choose (Represents BLANK)	<b>List C Employment Authorization</b> Document Title Please Choose (Represents BLANK)
Issuing Authority Please Choose (Represents BLANK)	Issuing Authority Please Choose (Represents BLANK)	Issuing Authority Please Choose (Represents BLANK)
Document Number Document #	Document Number Document #	Document Number Document #
Expiration Date (if any)(mm/dd/yyyy) Expiration Date	Expiration Date (if any)(mm/dd/yyyy) Expiration Date	Expiration Date (if any)(mm/dd/yyyy) Expiration Date
Document Title Please Choose (Represents BLANK)	<b>Additional Information</b> Additional Information	
Issuing Authority Please Choose (Represents BLANK)		
Document Number Document #		
Expiration Date (if any)(mm/dd/yyyy) Expiration Date		

Document Title Please Choose (Represents BLANK)	<b>Certification</b> I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.* <input type="radio"/> NO <input type="radio"/> YES
Issuing Authority Please Choose (Represents BLANK)	
Document Number Document #	
Expiration Date (if any)(mm/dd/yyyy) Expiration Date	
<b>Employer/Representative</b> The employee's first day of employment (mm/dd/yyyy)* 05/22/2019	
<b>E-Signature</b> Type your name here* E-Sign Name	<b>Today's Date (mm/dd/yyyy)*</b> 08/07/2019

<b>Employer or Authorized Representative</b> Title of Employer or Authorized Representative* <input type="text" value="Title"/> Last Name of Employer or Authorized Representative* <input type="text" value="Blake"/> First Name of Employer or Authorized Representative* <input type="text" value="Mike"/>	<b>Business/Organization</b> Employer's Business or Organization Name* <input type="text" value="Brown's Auto Supply (BAR)"/> Employer's Business or Organization Address (Street Number and Name)* <input type="text" value="324 Industrial Avenue"/> City or Town* <input type="text" value="Burlington"/> State* <input type="text" value="VT - VERMONT, US"/> ZIP Code* <input type="text" value="05401"/> <input type="button" value="SAVE AND GENERATE I-9 (SEC 2)"/>
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The Admin/Manager clicks **Yes** to the **Attestment** section, signs the E-Signature section and clicks the **Save and Generate I-9 (Sec 2)** button.

### I-9 Related Employee Notification

**Admins** can set up a Notification to inform an employee that they are being asked to complete an I-9 document. Go to **HR Admin – Communications – Notifications** and select the **Compliance Category**. For more information about Notifications, see the *Advanced HR 2.0 Administrator Guide*.

<input checked="" type="checkbox"/> Compliance	<input type="checkbox"/> I-9 Assignment	<input type="checkbox"/> NO <input checked="" type="checkbox"/> YES	Target Employee	Delivery when event occurs	Employee being asked to complete I-9 document
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