

Sterling I-9 User Guide

I-9 Reporting

Sterling | September 2023

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STERLING I-9

Our modern, end-to-end, and integrated I-9 solution helps address the complexity of U.S. employment eligibility with ease and efficiency

At Sterling, we've made it our mission to provide the foundation of trust and safety our clients need to create great environments for their most essential resource, people.

With today's stringent government policies and ever-changing regulations, costly remote hiring, form retention and audit management – an intelligent I-9 solution has never been more important. With investment in our modern, end-to-end I-9 solution, Sterling helps our clients address of complexity of U.S. employment eligibility with ease and efficiency.

HOW STERLING I-9 IS DIFFERENT

- **High Standards of a Single Provider.** We lead the market as an expert in the screening functions with our own end-to-end I-9 solution, allowing us to respond faster to your needs, without relying on additional providers.
- **An Adaptable, Streamlined Solution.** We provide an end-to-end, streamlined screening and I-9 experience – including service, onboarding, and support – that can quickly adapt to changing market and business needs.
- **Modern, Intuitive Experience.** We offer a modern, easy-to-use, mobile-responsive experience for both clients and their employees.
- **Integrated Solution.** Our robust Sterling Integration Platform (SIP) ecosystem streamlines the hiring process with your onboarding and core HR systems.

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I-9 Reporting

Sterling I-9 has various reporting choices, mostly dependent upon the data type needed. Standard reporting is available via the [Reports](#) link in the menu bar.

Dashboard	Onboarding	Form I-9	Tasks	Records	Batch Upload	Reporting
Reports						

Standard Reporting

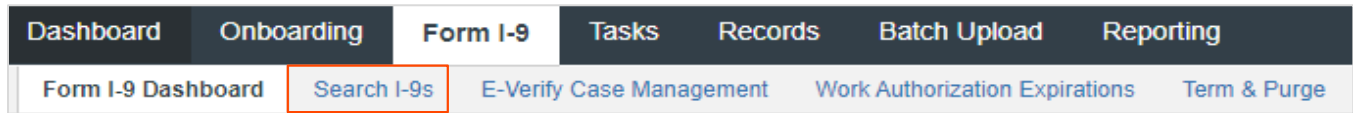
There are five (5) standard reports that provide necessary data for Sterling I-9:

- **Candidate Export:** (requires specific permission setting) This report is a data extract of employee and order information. This report can be configured to report sensitive personally identifiable information.
- **Invoices and Statements:** Data from this report can include details on specific I-9 orders placed in the Sterling I-9 system.
- **Form I-9 Expiration Report:** This data shares work authorization document expiration information based on timeframe, as well as document receipts and those employee's awaiting social security numbers.
- **I-9/E-Verify:** This is a summary report that shows tasks completed, late submissions, and results by category.
- **Verifier & Notary Network Activity:** This is a summary report of orders assigned to Verifier Network & Notary Network workflow, including sub-statuses.

	Report Name ↑
General	
	Candidate Export
	Enhanced Summary Report
	Invoices and Statements
	On Time Delivery Report
	Open Reports Report
	Ordered Report Summary
	Periodic Comparison Report
	Product Detailed Report
	Product Line Overview
Onboarding	
	Form I-9 Expiration
	Hiring Process Report
	I-9/E-Verify
	Verifier & Notary Network Activity

Search I-9s

Data is gained via advanced filtering and listing exports found in the **Form I-9** menu bar.



Choose **Search I-9s** submenu.

Expand the **Advanced Search Options**.

Using the various search fields, build the search using required data points.

Click **Search**.

In the results pane near the bottom of the screen, find and click the **Download in Excel Format** link to create a spreadsheet extract (.CSV format).

I-9s 1 - 10 of 22						Download in Excel Format ?
	Name	Package	Date Searched	Status	Result	
<input type="checkbox"/>	Ninetofive, Irene (225262169)	I-9 Verifier Network with E-Verify	Nov 2 6:24 AM By Prod Test	Form I-9 Required		Action...
<input type="checkbox"/>	Ninetofive, Irene (225256508)	Electronic I-9 with E-Verify	Nov 2 4:43 AM By Prod Test	Complete Nov 2 4:49 AM	Clear	Action...
<input type="checkbox"/>	Ninetofive, Irene (225157314)	I-9 Keyed in from Hard Copy (Rehire)	Nov 1 1:46 AM By Prod Test	Complete Nov 1 3:46 AM		Action...
<input type="checkbox"/>	Ninetofive, Irene (225059721)	I-9 Verifier Network Standalone	Oct 29 9:45 AM By Prod Test	Closed		Action...

PLEASE NOTE: More data columns will populate in the downloaded Excel file than on-screen


E-Verify Case Management

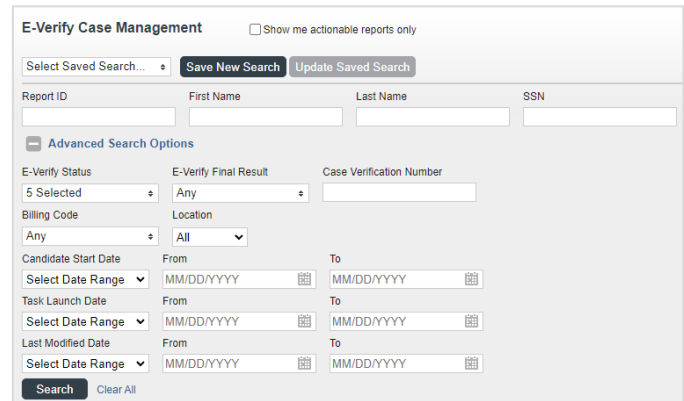
Choose **E-Verify Case Management** submenu.

Expand the **Advanced Search Options**.

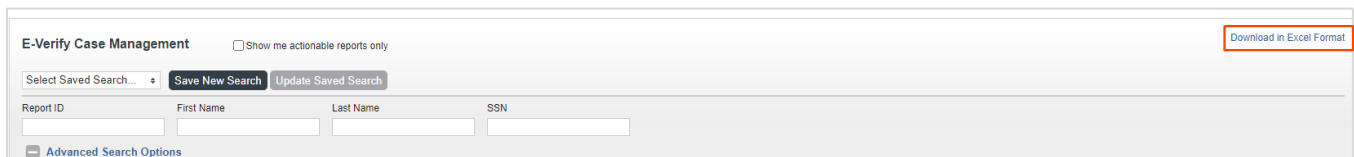
Using the various search fields, build the search upon required data points.

Click **Search**.

 To learn more about E-Verify Case Management, click [here](#).



In the upper right hand corner of the page, find and click the **Download in Excel Format** link to create a spreadsheet extract (.CSV format).



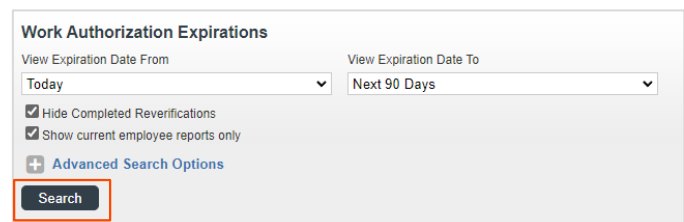
Work Authorization Expirations

Choose **Work Authorization Expirations** submenu.

Expand the **Advanced Search Options**.

Using the various search fields, build the search upon required data points.

Click **Search**.



In the upper right hand corner of the page, find and click the **Download in Excel Format** link to create a spreadsheet extract (.CSV format).



Work Authorization Dashboard – Available Actions

The following actions are available (as applicable) for each entry on the Work Authorization page:

- **View Applicant Report** – This will open the Form I-9 Report Page with details about the Form I-9 order (including visibility of the Form I-9 PDF and document attachments, as applicable)
- **Mark Complete** – This clears the alert for this work authorization expiration and removes it from the work authorization expiration dashboard
- **Reverify Employee** – This will open the “Add Onboarding” process where user can order a Section 3 (Reverification or Rehire) for Form I-9; used for work authorizations that are due to expire
- **Update and Submit** – This will open the “Edit I-9” workflow, allowing for update of the original Form I-9 with new/relevant information; used for situations where receipts or temporary documentation were used for original Form I-9 completion
- **No Longer Employed** – This will trigger a termination date input area so that 1) the work authorization no longer appears on the dashboard, and 2) inputs a termination date for the Sterling I-9 Term & Purge functionality

Reverification Report

Working with your Sterling Client Support team, it is possible to enable the regular email delivery of the Reverification Report to identified users. This report shows those I-9s that require reverification immediately, or within the next 90 days.

Attention Prod Test,

Here is your reverification report:

Report ID	Name	Document Type	Expiration Date	Complete	Billing Code	Reference Code	Location
168203177	Caitland J Pearson	Employment Authorization	01/01/2022	no longer employed	Billing Code 1		Location 1
207551173	Dale Demo	Employment Authorization	01/01/2022		Billing Code 2		Location 4
176994795	Delaney Smith	Form I-766	01/01/2022		Billing Code 2		
207546425	Deshawn Demo	Employment Authorization	01/01/2022		Billing Code 2		Location 3
168459017	Sarah E Sterling	Employment Authorization	01/01/2022	04/01/2021	Billing Code 2		Location 2
177856789	Sarah Jones	Employment Auth. Doc. issued (DHS) List C #7	01/01/2022		Billing Code 2		Location 2
222267069		Awaiting SSN	11/03/2021	10/25/2021	Billing Code 2		
224645545	Irene Ninetofive	Employment Authorization	10/26/2021		Billing Code 1		

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Additional I-9 Resources

Looking for something specific? Click on the [Sterling I-9 User Guide Resource Page](#).