

A background image of a woman with dark, curly hair, wearing a light blue jacket over a red and white striped shirt. She is looking down and to the left with a thoughtful expression, resting her chin on her hand. The image is overlaid with a semi-transparent dark grey filter. Several small, semi-transparent squares in shades of grey and orange are scattered across the page, some overlapping the text and the background image.

Sterling I-9 User Guide - Form I-9 Verifier Options

Sterling | September 2023

Confidential & Proprietary Statement

This material constitutes confidential and proprietary information of Sterling and its reproduction, publication or disclosure to others without the express authorization of the Chief Legal and Risk Officer of Sterling is strictly prohibited. This presentation and related materials are for informational purposes and represents the expectation of Sterling today only. It is subject to change at any time, for any reason, without notice and Sterling undertakes no duty to provide any update or change at any time. The information presented is not a promise or contract of any kind. Nothing contained herein is legal advice. Sterling recommends working with your legal counsel to ensure overall screening program compliance. Sterling is a service mark of Sterling Infosystems, Inc.

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.

Table of Contents

Introduction to Sterling I-9	1
Sterling I-9’s Verifier Network.....	5
Ordering Verification Network I-9	5
Verifier Network – Employee Experience.....	6
Verifier Network – Client Scheduling Confirmation	9
Verifier Network – Incomplete Status	9
Verifier Network – Other Statuses.....	10
Verifier Network – Cancellations and Scheduling.....	11
Sterling I-9’s Notary Network.....	11
Ordering Notary Network I-9	11
Employee Experience	12
Automated Notary Text Message	13
Agent Appointment Scheduling.....	14
Challenges with Appointments – “Client Action Needed”	14
Document Review and Upload – Special Note.....	16
Reporting.....	17
Additional I-9 Resources	18

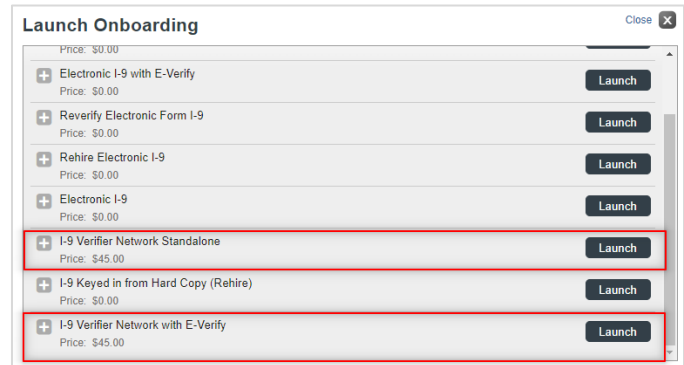
Sterling I-9's Verifier Network

PLEASE NOTE: The Verifier Network is a contracted service. This option applies only to those clients that are contracted and set up for this service.

The Sterling I-9 Verifier Network solution is designed for remote completion of Form I-9 Section 2 by a partner network with locations in every state in the U.S. This partner network provides the ability for remote or off-site employees to schedule a session to complete Section 2. Additional information for Section 2 can be accessed [here](#). The Verifier Network option is available with or without E-Verify. This service is available to clients set up for this option at an additional fee.

Ordering Verification Network I-9

From the candidate record, scroll down to the **Add Onboarding** section, and click **Launch** for the desired "Verifier Network" I-9 package.



The Form I-9 ordering process is the same as described in the Sterling I-9 User Guide – [Ordering and Completing Section 1](#), up through the completion of Section 1.

Review and click **Submit** to order.

The screenshot shows a 'Company Information' form with the following sections and fields:

- Company Profile***: Sterling Talent Solutions (dropdown)
- Employee Profile**:
 - First Name*: Irene
 - Middle Name: [empty]
 - Last Name*: Ninetofive
 - Employee Email Address*: sbctwdemo+JHILLIrene95@gmail.com
 - Employee Start Date*: Nov 15 2021
- Order Tracking**:
 - Organization Name*: Sterling Talent Solutions (dropdown)
 - Billing Code*: Billing Code 1 (dropdown)

* Indicates required field

PLEASE NOTE: There is no verifier choice to make as part of the ordering process. Additionally, there is no choice for remote/in-person completion of Section 1, as all Verifier Network orders are not at the organization's workplace

Verifier Network – Employee Experience

The notification sent to the employee will be like the standalone Section 1 task assignment notification. There will be a call-out in the notification email indicating the need to schedule an appointment for Section 2 completion.

The employee experience in Section 1 is the same as in the electronic I-9 service. The employee uses a secure login portal and completes Section 1 through the eSignature process.

Following eSignature, the employee is provided with further instructions and a link to [Schedule Section 2](#).

The employee receives an email with their scheduling link upon completion of Section 1.

If the employee fails to schedule their appointment, reminder emails are sent on a regular basis.

After clicking the [Schedule Section 2](#) or the [Schedule Now](#) button, the employee is directed to the Sterling Verifier Network scheduling website.

The employee chooses [Continue](#) to proceed.

Attention Irene Ninetofive:

Please use the button below to begin filling and signing your Employment Eligibility Verification (Form I-9) online. The Form I-9 should be completed before the due date shown below. If you have previously signed in to the Sterling Talent Solutions, you will be able to use the permanent password you previously set, or use the **Forgot your password?** option on the sign-in page to receive a new temporary password.

Please note that after you complete Section 1 of the Form I-9, you will receive another email requiring you to schedule an appointment for completion of Section 2.

Task	Due Date	Status
Complete and Sign Form I-9	11/20/2021	New

[Get Started](#)

If you have any questions, or received this email in error, please [click here](#) to contact Sterling Talent Solutions.

This email has been automatically generated. Please do not reply to this message.

eSign Forms

eSigning Complete
You have completed electronically signing your Form I-9.

Additional Action Required!

Please click the [Schedule Section 2](#) button below to schedule a time to have Section 2 of your Form I-9 completed at one of our partner locations. You may complete this task now using the [Schedule Section 2](#) button, or you may use the scheduling task email link that will be sent to you and follow the instructions provided to schedule your Form I-9 Section 2 completion.

You must bring original versions (not copies) of either one document from List A, or a combination of one document from List B and one document from List C to be inspected by one of our partner locations, who will then complete section 2 of the Form I-9.

A list of acceptable list A, B, and C documents can be viewed as a PDF using the link below.

[Schedule Section 2](#)

[List of Acceptable Documents.pdf](#)

LISTS OF ACCEPTABLE DOCUMENTS

Attention Irene Ninetofive:

Please use the button below to schedule a time to have Section 2 of your Form I-9 completed by one of our partner representatives.

The Form I-9 Section 2 must be completed on or before **11/05/2021**.

Once you select the [Schedule Now](#) button, you will be taken to the partner website to select your location and appointment time.

[Schedule Now](#)

If you have any questions, or received this email in error, please [click here](#) to contact Sterling Talent Solutions.

This email has been automatically generated. Please do not reply to this message.

Sterling

Procedures & Terms | Select Location & Time | Confirm Appointment

Form I-9 Scheduling Procedures

Before you schedule online, please be sure you read and understand the instructions below.

When you have read and fully understand these instructions, please check the "Continue" button below.

Please Note: All appointments must be scheduled at least 24 hours in advance of the appointment date and time. If there are no seats available in the processing center near you, then you should submit a self request.

SCHEDULING

Please arrive at the processing center fifteen (15) minutes prior to the beginning of your appointment to allow time for the check-in process. If you are more than fifteen (15) minutes late for your scheduled appointment, the center may not be able to accommodate you and your start date may be delayed.

IDENTIFICATION

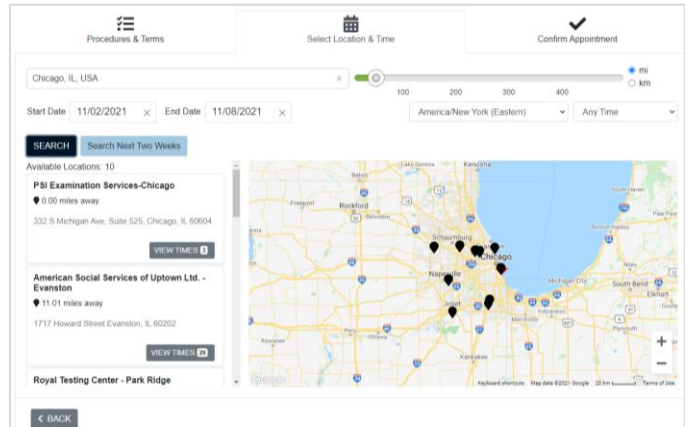
In accordance with the provisions of the Immigration Reform and Control Act of 1986, you will need to provide original, not photocopy, documents supporting your identity and eligibility to work in the United States. For your convenience, below is a "List of Acceptable Documents." Please review it, so that you will have the appropriate document(s) available for your appointment.

You will need either:

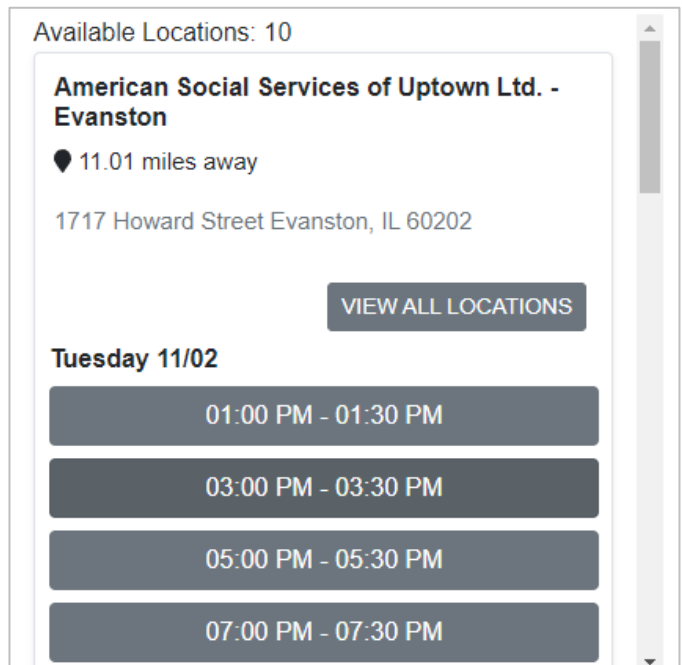
One (1) document from List A

[CONTINUE](#)

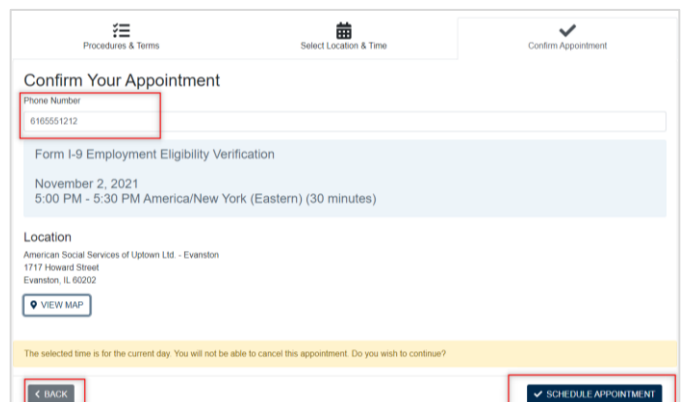
The employee enters the desired location of their appointment and sets the search radius slider. The employee also sets an appointment date range and clicks **Search**.



The employee scrolls through the locations, viewing available times at each location. The employee selects their scheduled meeting location and date/time.



The employee is prompted to enter their phone number, and review/confirm their appointment details. If needed, the employee can go back and change their appointment request. The employee may also view the specific appointment location on a map. When ready to schedule, employee clicks **Schedule Appointment**.



The employee is presented with the appointment instructions, including driving and parking details.

Form I-9 Employment Eligibility Verification

Appointment Information

Irene Ninetofive
 November 2, 2021
 5:00 PM - 5:30 PM America/New York (Eastern) (30 minutes)

Scheduling Procedures

Please Note: All appointments must be scheduled at least 24 hours in advance of the appointment date and time. If there are no seats available in the processing center near you, then you should submit a seat request.

SCHEDULING

Please arrive at the processing center fifteen (15) minutes prior to the beginning of your appointment to allow time for the check-in process. If you are more than fifteen (15) minutes late for your scheduled appointment, the center may not be able to accommodate you and your start date may be delayed.

IDENTIFICATION

In accordance with the provisions of the Immigration Reform and Control Act of 1986, you will need to provide original, not photocopy, documents supporting your identity and eligibility to work in the United States. For your convenience, below is a "List of Acceptable Documents." Please review it, so that you will have the appropriate document(s) available for your appointment.

Location

American Social Services of Uptown Ltd. - Evanston
 1717 Howard Street
 Evanston, IL 60202
 773.249.4325
 Driving Directions

The employee has the option to reschedule or cancel the appointment if the appointment is scheduled more than 24-hours in advance. If the employee needs to reschedule the appointment, they can access this by clicking the Schedule Now link in the original email notification.

Attention Irene Ninetofive:

Please use the button below to schedule a time to have Section 2 of your Form I-9 completed by one of our partner representatives.

The Form I-9 Section 2 must be completed on or before **11/05/2021**.

Once you select the **Schedule Now** button, you will be taken to the partner website to select your location and appointment time.

Schedule Now

If you have any questions, or received this email in error, please [click here](#) to contact Sterling Talent Solutions.

This email has been automatically generated. Please do not reply to this message.

The employee receives a calendar invitation via email which includes location, date/time, and specific location information.

Included in the calendar invitation is a button/link to allow for rescheduling.

Hello Irene Ninetofive,

You have been scheduled for an appointment for SterlingTalentSolutionsI9 to participate in Form I-9 Employment Eligibility Verification.

Your appointment details are listed below: **The appointment being added to your calendar is a feature we offer as a courtesy to you. Due to the many variances in email programs and computer time settings, we cannot guarantee the accuracy of the calendar appointment. It is your responsibility to confirm your calendar appointment is correct and adjust your computer or email time zone settings if necessary.**

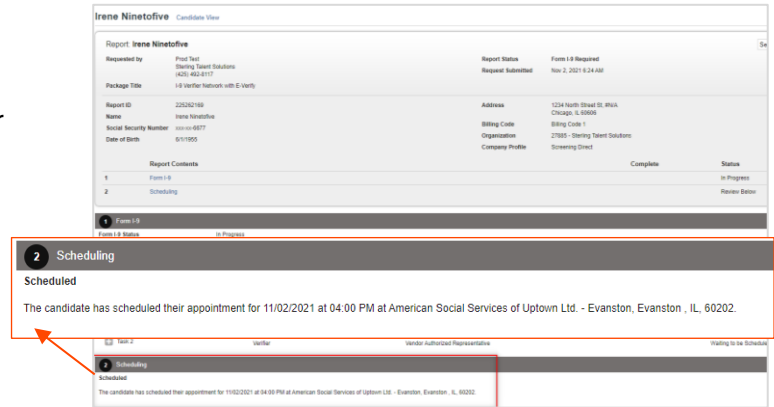
When:
 Tuesday, November 2, 2021 - 5:00 PM America/New York (Eastern)

Where:
 American Social Services of Uptown Ltd. - Evanston, 1717 Howard Street
 Evanston, IL 60202

Driving Directions:
 FROM SOUTH CHICAGO GOING NORTH, TAKE WESTERN AVE, TURN LEFT ON HOWARD STREET, DRIVE ABOUT QUARNTER MILE, 1717 HOWARD STREET, WILL BE ON YOUR RIGHT AND PARK ON THE STREET. FROM SOUTH CHICAGO GOING NORTH, TAKE CALIFORNIA AVE, TURN RIGHT ON HOWARD STREET, DRIVE ABOUT QUARNTER MILE, 1717 HOWARD STREET, WILL BE ON YOUR LEFT AND PARK ON THE STREET. COMING FROM DOWN TOWN CHICAGO ON LAKE SHORE DRIVR, EXIST ON HOLLYWOOD TO PETERSON, THEN TURN RIGHT ON WESTERN AVE, TURN LEFT ON HOWARD STREET, DRIVE ABOUT QUARNTER MILE, 1717

Verifier Network – Client Scheduling Confirmation

Sterling I-9 users can verify appointment scheduling details from within the Sterling I-9 candidate record under **Report View**. Scroll down to the **Scheduling** section of the page for details.



If the employee indicates that they did not receive or lost their scheduling email notification, the scheduling email can be resent to employee via the Report View.



Verifier Network – Incomplete Status

For I-9 Verifier Network appointments with an **Incomplete** status displayed in the Scheduling area, please read the status description details below and check for any follow-up actions.

For statuses **Incomplete-Canceled**, **Canceled**, and **No Show**, the Sterling I-9 user will need to cancel the current package and launch a new one.

- You will be billed at full cost if the employee does not cancel within the 24-hour notice period or fails to show up for their appointment (No Show).
- If for any reason the employee’s appointment cannot be completed due to an employee error (failed to bring documents, made an error in Section 1, etc.), you will be billed for the package and a new package will need to be launched and scheduled.
- If for any reason the employee’s appointment cannot be completed due to an error by Sterling or the Verifier Network, you will not be billed for the package. However, a new package will need to be launched and scheduled.

Billing for each transaction will appear on the standard monthly Billing Report.

Status	Client Facing Message	Definition	Action Needed	Client Billed
Incomplete	The employee was unable to complete their appointment due to technical difficulties with our partner. Pending reschedule by the employee. To resend the scheduling email, please click the Send Email button in the Report View.	The new hire did not complete the session due to an issue under the test center's responsibility	Employee needs to reschedule their appointment	The client can be billed upon completion, No Show or late cancel of the I-9 at full cost
Incomplete - Cancelled	The employee was unable to complete their appointment upon arrival. Please launch a new Remote I-9 package for this employee from the Candidate Record.	The new hire did not complete due to an issue he/she is responsible for (such as improper ID)	The package needs to be canceled and a new order launched	Yes
Complete	The employee has cancelled their appointment outside of the allowed grace period of 24 hours. Please launch a new Remote I-9 package for this employee from the Candidate Record	The appointment has been cancelled outside of the allowed grace period	The package needs to be canceled and a new order launched	Yes
No Show	The employee failed to show up for their scheduled appointment. Please launch a new Remote I-9 package for this employee from the Candidate Record	The new hire failed to show up to the proctored center	The package needs to be canceled and a new order launched, if needed.	Yes

Verifier Network – Other Statuses

Status	Client Facing Message	Definition	Action Needed	Client Billed
Scheduled	The employee scheduled their appointment for <enter date> at <enter time> at <enter location>.	The appointment is scheduled (or rescheduled) at a specific time and place	None. The employee must arrive at their scheduled appointment time and location	The client will be billed upon completion, No Show, or late cancel of the I-9 at full cost
Awaiting Reschedule	The employee cancelled their appointment within the allowed grace period of 24 hours. Pending reschedule by the employee. To resend the scheduling email, please click the Send Email button in the Report View.	The appointment is cancelled within the allowed grace period, but not yet rescheduled	Employee needs to reschedule their appointment	The client will be billed upon completion, No Show, or late cancel of the I-9 at full cost
Complete	The employee has attended their appointment and Form I-9 Section 2 is now complete	The new hire successfully completed the proctored appointment and has been checked out	None	Yes
Incomplete	The employee is unable to complete their appointment due to technical difficulties with our partner. Pending reschedule by the employee. To resend the scheduling email, please click the Send Email button in the Report View.	The new hire did not complete the session due to an issue under the Verifier Network's responsibility	Employee needs to reschedule their appointment	Client is not billed for Verifier Technical difficulties
Incomplete	The employee is unable to complete their appointment due to technical difficulties with Sterling I-9. Pending reschedule by the employee. To resend the scheduling email, please click the Send Email button in the Report View.	The new hire did not complete the session due to a technical issue under Sterling's responsibility	Employee needs to reschedule their appointment	Client will not be billed for technical difficulties with Sterling I-9 system

Verifier Network – Cancellations and Scheduling

- Employees may cancel their appointment at no cost to the client if canceled with at least 24-hours’ notice.
- Employees may cancel or reschedule from the scheduling link in the original scheduling email if outside of the 24-hour notice period.
- If the appointment is canceled or rescheduled with less than 24-hours’ notice, the account is charged the full cost of the I-9 Verifier Network Package.
- If the user decides they no longer want to use Verifier Network for an individual Form I-9 that has already been launched and they would prefer to verify Section 2 instead, they must cancel the package and launch the desired I-9 service instead. If the package is cancelled with less than 24-hours’ notice from when the employee scheduled their appointment, the account is still billed.

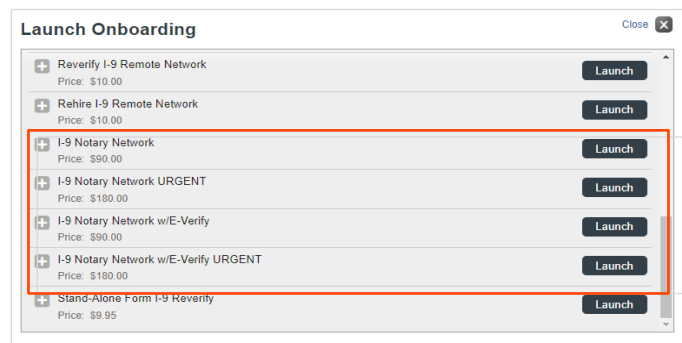
Sterling I-9’s Notary Network

PLEASE NOTE: The Notary Network is a contracted service. This option applies only to those clients that are contracted and set up for this service.

The Sterling I-9 Notary Network solution is designed for remote completion of Form I-9 Section 2, by an agent from Sterling’s network of notary agents throughout the United States. This is a great verification option for completion of Section 2 of Form I-9 for remote or off-site employees. The Notary Network option is available with or without E-Verify and must be selected accordingly at the time of Form I-9 order. This service is available to clients set up for this option at an additional fee.

Ordering Notary Network I-9

From the candidate record, scroll down to the **Add Onboarding** section, and click **Launch** for the desired Notary Network I-9 package.



PLEASE NOTE: Notary Network standard orders include agent initial contact within 2-5 business days from the date of Section 1 completion. URGENT service can be ordered (additional fees apply) which has a 1-2 business day timeframe from Section 1 completion to agent contact with the employee.

The Form I-9 process is the same as described in the Sterling I-9 User Guide – [Ordering and Completing Section 1](#), through the completion of Section 1.

Review order details and make edits/corrections as necessary. Click **Submit** to order.

The screenshot shows the 'I-9 Notary Network' form in the Sterling I-9 system. The form is divided into two main sections: 'Employee Profile' and 'Order Details'. The 'Employee Profile' section contains input fields for 'First Name' (Anita), 'Middle Name', 'Last Name' (Eyeline), 'Employee Email Address' (sbctwdemo+JHILLAnita@gmail.com), and 'Employee Start Date' (May 9, 2022). Below this is an 'edit links' section. The 'Order Details' section includes a company profile (N3 profile), employee name (Anita Eyeline), start date (5/9/2022), and reference code (Central → Yellow Stone → Dept_8). A 'Submit' button is located at the bottom of the form and is highlighted with a red rectangular box.

PLEASE NOTE: There is no verifier choice to make as part of the ordering process. Additionally, there is no choice for remote/in-person completion of Section 1, as all Notary Network orders are not verified at the organization’s workplace.

Employee Experience

The notification sent to the employee is like the usual Section 1 task assignment notification.

There is a call-out that an additional email will be sent to the employee prompting them to schedule their verifier appointment.

The screenshot shows an email notification titled 'Attention Anita Eyeline:'. It provides the user's email address for sign-in (sbctwdemo+JHILLAnita@gmail.com) and a temporary password (FvI). The email instructs the user to click a button to begin filling and signing their Employment Eligibility Verification (Form I-9) online. A call-out box with a red border highlights the following text: 'Please note that after you complete Section 1 of the Form I-9, you will receive another email requiring you to schedule an appointment for completion of Section 2.' Below this is a table with columns for 'Task', 'Due Date', and 'Status'. The table contains one row: 'Complete and Sign Form I-9' with a due date of '05/09/2022' and a status of 'New'. A 'Get Started' button is located below the table. The email concludes with a note that it was automatically generated and a copyright notice for Sterling Talent Solutions.

Task	Due Date	Status
Complete and Sign Form I-9	05/09/2022	New

The employee experience in Section 1 is the same as in the electronic I-9 service. However, the employee is asked to provide specific location information for assigning a Notary Network agent for Section 2 completion.

My Dashboard > Standalone I9 Package

Section 1
 Section 2 Contact Information
 eSign Forms

Section 2 Contact Information

As part of the **next steps** in your Form I-9 process, we will assign an agent to meet with you to review your I-9 supporting documents and complete Section 2 of your Form I-9. In order to match you with an agent close to you, please provide us a location where you can regularly be reached Monday-Friday 8AM-6PM. This location **MIGHT BE** different than your home address (ex: if you are not typically near your home address during the M-F 8A-6p timeframe).

Please note - actual location of meeting will be discussed with your assigned agent.

PLEASE REVIEW AND MODIFY ALL FIELDS BELOW BEFORE PROCEEDING

City * State * Zip Code *

 (Select State/Territory)

Telephone Number * Email *

Failure to provide **accurate information** can result in additional charges to your employer as well as delay in expected employment start date.

Following the signature step in Section 1, the employee is provided with further information about the process for scheduling their Section 2 appointment.

eSign Forms

eSigning Complete

You have completed electronically signing your Form I-9.

Additional Action Required!

In the next 5 business days, you should be contacted by an Agent to complete Section 2 of your Form I-9. This Agent is from an organization called **N3** and may contact you via phone or text to schedule an appointment. Please note:

- This appointment must be completed in a timely manner - please work with agent to find a time that is agreeable as soon as possible
- Agent will recommend a public meeting location to complete your Form I-9 (ex: coffee shop, public library, etc.)
- You must still bring the original, physical versions (not copies) of **either one selection from List A, or a combination of one selection from List B and one selection from List C** to be inspected by a representative of your employer, who will then complete section 2 of the Form I-9.

A list of acceptable list A, B, and C documents can be viewed as a PDF using the link below.
[List of Acceptable Documents.pdf](#)

The employee also receives an email with the instructions to schedule their Section 2 appointment.

Attention Ivana Ninetofive:

Thank you for completing Section 1 of your Form I-9 for Sterling Talent Solutions.

In the next 5 business days, you should be contacted by an Agent to complete Section 2 of your Form I-9. This Agent is from an organization called **N3** and may contact you via phone or text to schedule an appointment. Please note:

- This appointment must be completed in a timely manner - please work with agent to find a time that is agreeable as soon as possible
- Agent will recommend a public meeting location to complete your Form I-9 (ex: coffee shop, public library, etc.)
- You must still bring the original, physical versions (not copies) of **either one selection from List A, or a combination of one selection from List B and one selection from List C** to be inspected by a representative of your employer, who will then complete section 2 of the Form I-9.

If you have any questions, or received this email in error, please [click here](#) to contact Sterling Talent Solutions.

This email has been automatically generated. Please do not reply to this message.

© 2022 Sterling Talent Solutions

Automated Notary Text Message

After the employee completes Section 1, Notary Network will receive the request for a Section 2 Verification appointment. When the Notary Network assigns an agent that is in proximity of the location indicated by employee in Section 1, the following automated message is texted to employee by Notary Network:

Text comes from phone number: **414-269-6379**

Sample Message:

John, this is N3 Notary contacting you on behalf of [CLIENT NAME]. Paul has been assigned as your Agent to assist you in completing your I-9. Paul can be reached at 111-222-1234.

You can review Paul's profile page here:

<https://secure.n3notary.net/ReachHire/Agent/AgentProfile.php?OrderID=2396222>

Prior to meeting with the Agent we ask that you complete Section 1 of the electronic I-9. If you have any questions, contact your employer Rep.

Sample Agent Profile Page: <https://secure.n3notary.net/ReachHire/Agent/AgentProfile.php?OrderID=2396222>

Agent Appointment Scheduling

Typically, within 1 to 2 business days, the employee will receive a text or phone call from the Notary Network agent seeking coordination of a meeting time and location. The Notary Network agent will propose meeting in a public location – often a coffee shop, restaurant, or public library.

The employee is expected to work directly with the agent to determine the best possible meeting location and meeting time to complete Section 2 verification. Most appointments last no more than 10 to 15 minutes.

PLEASE NOTE: Agents are not able to provide advice or recommendations on documents to bring to the Section 2 appointment. Questions should be directed to the employer prior to appointment.

Challenges with Appointments – “Client Action Needed”

There are times when errors and messages are relayed back to the employer from the Notary Network. Some of the messages require employer input and response; others require current order cancellation, and a new Notary Network order would be required for completion. When Sterling I-9 receives such *action needed* updates from Notary Network, the Form I-9 initiator will receive an email message.

PLEASE NOTE: Orders that require cancellation after the appointment has been scheduled or appointment has started will be charged to client as billable appointment attempt. A new order would incur another charge to client.

Some “trouble” statuses for Notary Network orders include:

- Employee has questions which cannot be answered by Notary Network
- Employee is unable to meet at/near location which was provided in Section 1
- Employee no longer requires Notary Network services
- Employee could not provide necessary documents at appointment
- Employee was no-show for scheduled appointment
- Other technical issues prevented completion of appointment
- Employee cancelled appointment after Notary was in transit

Employee Has Questions

2 Scheduling

Notary Network - Client Action Needed

Notary Network has indicated that employee has questions that cannot be answered. Client must contact employee to answer questions before appointment can take place. Please contact employee. Once questions are resolved, please check here and press Submit

I have resolved employee questions. Please proceed with Notary Network appointment.

The employee has shared with the Notary Network agent or service that they do not have the necessary information to schedule the appointment. The employer needs to contact the employee and help answer questions for the scheduling process to continue. (Example: Employee is unsure which document to bring to their appointment.)

Available next steps:

- Update the Sterling I-9 solution indicating that the employee’s questions have been answered and that scheduling process can proceed.
- Cancel the Notary Network order.

Employee Unable to Meet at Location

The employee has shared with the Notary Network agent or service that they could not meet based on the original employee-entered desired meeting location (city/state/zip).

Available next steps:

- Update the Sterling I-9 solution with the employee’s desired city, state, and zip location – which creates a new Notary Network order.
- Cancel the Notary Network order.

Employee Could Not Provide Documents

During the scheduled Notary Network appointment, the employee was unable to provide proper documentation to support the successful completion of Form I-9.

Available next steps:

- Cancel & Reorder a Notary Network Order.
- Cancel the Notary Network Order.

Employee No-Show for Appointment

2
Scheduling

Notary Network - Client Action Needed

Notary Network has indicated that employee did not show for scheduled appointment time. Please confirm that you've contacted employee and press Submit.

Employee contacted. Please order new Notary Network appointment

Submit

For the scheduled Notary Network appointment, the employee did not show or contact the agent for their scheduled appointment time.

Available next steps:

- Cancel & Reorder a Notary Network Order.
- Cancel the Notary Network Order.

Other Technical Issues

2
Scheduling

Notary Network - Client Action Needed

Notary Network has indicated that there were technical issues that prevented the completion of the I-9. Please contact employee and provide an update here and Submit.

Submit

There were technical issues that prevent the Notary Network agent from successfully completing the Form I-9.

Available next steps:

- Cancel & Reorder a Notary Network Order.
- Cancel the Notary Network Order.

Document Review and Upload – Special Note

To help preserve employee confidentiality and support data privacy, Notary Network agents **will NOT** be able to view or upload electronic documents that were uploaded by employees in Form I-9 Section 1 completion. If the **Retain E-Verify Required Documents only** or the **Retain All Documents** preference setting is enabled in Sterling I-9, the employee is *required* to upload their documents in the Section 1 completion process.

The noted option is NOT available for Notary Network Form I-9 orders.

My Dashboard > Electronic Form I-9

File Upload **▶** Acceptable Documents

Section 1

eSign Forms

In order to complete the I-9, an employee must present a document or combination of documents. You will be required to upload copies of the document(s).

From the list below, please identify if you will provide a document from List A (which shows both identity and employment authorization) or one document from List B (which shows identity) and one document from List C (which shows employment authorization).

For a full list of acceptable documents, please visit the USCIS Acceptable Documents page.

File Upload

What document(s) will you be providing for review?

One document from List A

One document from List B -AND- One document from C

I am unable to upload my documents. I understand that I MUST provide my original documents to my assigned Verifier for upload.

Next Save

If the employer is unsure about their current preference setting – or wishes to make changes to preference settings, please contact your Client Success representative, or Sterling I-9 Support for Assistance.

Reporting

To help report on the various status and levels of completion for Notary Network orders, users have multiple tools.

Inflight Order Review – Report Page

The Sterling I-9 user verifies Notary Network order details from within the Candidate Record under **Report View**.

Report: **Fsd Sdfsd** Select ar

Requested by Hpm Test Talentwise Test (206) 111-2222	Report Status Form I-9 Required
Package Title I-9 Notary Network w/E-Verify URGENT	Request Submitted Apr 27, 2022 7:09 AM
Report ID 236759093	Reference Code NorthWest → Bellevue → Dept_2
Name Fsd Sdfsd	Company Profile N3 profile

Report Contents	Complete	Status
1 Form I-9	Complete	In Progress
2 Scheduling		Review Below
3 I-9 Notary Network E-Verify URGENT		Waiting on Form I-9

1 Form I-9

Form I-9 Status: In Progress

Initiator: Hpm Test (hpm-test@talentwise.com)

Employee Start Date: 06/08/2022 [Edit Date](#)

Form I-9 Due Date: 06/13/2022

Status Summary

Sequence	Role	Signer	Status
+ Task 1	Employee	candyFirstName CandyFirstName sbctwdemo+JASZ450@gmail.com	Complete
+ Task 2	Verifier	Vendor Authorized Representative	Waiting to be Scheduled

2 Scheduling

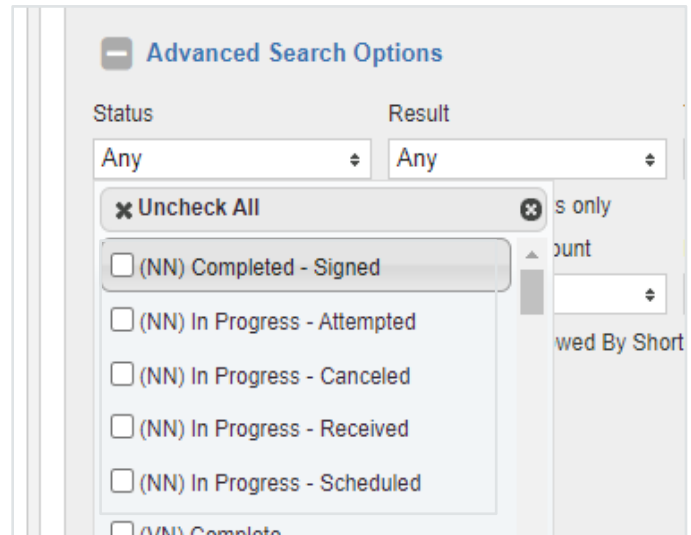
In Progress

Search I-9s – Advanced Filtering

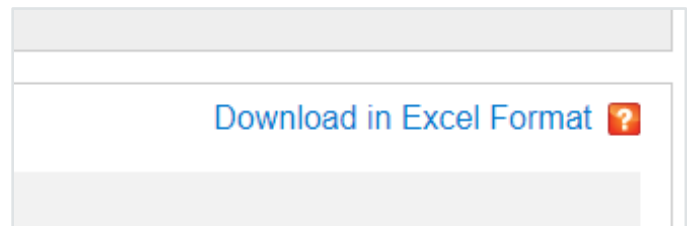
Go to **Form I-9** and then **Search I-9s**.
Open/Expand **Advanced Search Options**.

The screenshot shows the Sterling I-9 Search interface. The top navigation bar includes 'Dashboard', 'Screen', 'Onboarding', 'Form I-9', 'Tasks', 'Records', and 'Reporting'. The 'Form I-9' tab is active, and the 'Search I-9s' sub-tab is selected. The search area includes a 'Find a Candidate' field, a 'Quick Launch' dropdown, and a 'Recently Viewed' list. The main search section is titled 'Search I-9s' and includes a 'Show me new and updated reports only' checkbox, a 'Select Saved Search' dropdown, and buttons for 'Save New Search' and 'Update Saved Search'. Below this are input fields for 'Report ID', 'Last Name', 'First Name', and 'SSN'. A 'Report Date' section has a 'From' field set to '03/03/2022' and a 'To' field set to '05/02/2022', with a 'Last 60 Days' dropdown. A red box highlights the 'Advanced Search Options' button. At the bottom, a table shows 'I-9s 1 - 10 of 47' with columns for 'Name' and 'Package'. One entry is visible: 'Teststprod, Testst (237013276)' with package 'E Verify I9'.

In the pop-down menu for the **Status** filter, choose any of the status choices that **begin with (NN)**. These are the various Notary Network workflow statuses.



After filtering for the desired records, use the **Download in Excel Format** link to access the spreadsheet.



The data extract includes the status details in the new **Workflow Status** column

D	E	F	G	H
Date Searched	Search By	Status	Workflow Status	Status Date
4/29/2022 3:51	Hpm Test	Canceled	(NN) In Progress - Canceled	
4/29/2022 3:32	Hpm Test	Form I-9 Required	(NN) In Progress - Canceled	
4/29/2022 3:26	Hpm Test	Canceled	(NN) In Progress - Canceled	
4/28/2022 21:08	Hpm Test	Form I-9 Required	(NN) In Progress - Received	
4/27/2022 7:20	Hpm Test	Complete	(NN) In Progress - Attempted	4/27/2022 11:57
4/27/2022 7:19	Hpm Test	Complete	(NN) In Progress - Attempted	4/27/2022 11:56
4/27/2022 7:17	Hpm Test	Form I-9 Required	(NN) In Progress - Received	
4/27/2022 7:11	Hpm Test	Form I-9 Required	(NN) In Progress - Received	
4/27/2022 7:09	Hpm Test	Form I-9 Required	(NN) In Progress - Received	
4/27/2022 4:47	Hpm Test	Form I-9 Required	(NN) In Progress - Canceled	
4/27/2022 4:44	Hpm Test	Form I-9 Required	(NN) In Progress - Canceled	
4/27/2022 4:42	Hpm Test	Form I-9 Required	(NN) In Progress - Canceled	
4/27/2022 4:11	Hom Test	Form I-9 Required	(NN) In Progress - Canceled	

Additional I-9 Resources

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