Role Based Training Guide for the Tracker

This role based training guide allows each campus location to deliver customized training content to various users that will be using the Tracker application. The training curriculum in this guide is structured to be most relevant to the 4 types of users defined in the Tracker system: Client Admin, Advance User, Intermediate User, and Basic User. We will use Tracker’s terminology to define user roles until Tracker releases their enhanced feature of customized roles. Tracker has a concise online user manual and the curriculum listed in this training consists of links that directs you to Tracker’s manual.

How to use this Training Guide

MS Word format of this document will be used as a training template to allow campus locations the ability to customize their training materials specific to their location. The links in the MS Word formatted document are not functional. It is important to note that prior to releasing the training guide and curriculum to your users, you will need to convert the Word document to a Pdf formatted document to have the links functional. The Pdf format of this document can be distributed to your users for training.

Review Tracker’s defined security roles and responsibilities below to determine and assign the appropriate roles for your users. If your user is responsible for processing E-Verify cases or any future E-Verify cases, they will need to complete the E-Verify training in the curriculum.

Tracker Roles and Responsibilities

<table>
<thead>
<tr>
<th>Roles</th>
<th>Responsibilities and Permission level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Admin</td>
<td>Access to configure notification settings and manage worksites and users. Admins do not have I-9 Access. Dashboard view of Employer List. Local Admins should only access their Employer information.</td>
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<tr>
<td>Advance User (“with no E-Verify” or “with E-Verify”)</td>
<td>Access to complete dashboard view, manage I-9s, delete I-9 after Section 2 signed, and delete employee profile, audit management, and all reporting tools. Ability to manage E-Verify when security role “with E-Verify” is selected.</td>
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<tr>
<td>Intermediate User (“with no E-Verify” or “with E-Verify”)</td>
<td>Access to most dashboard view, manage I-9s, audit management, and all reporting tools. Ability to manage E-Verify when security role “with E-Verify” is selected.</td>
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<tr>
<td>Basic User (“with no E-Verify” or “with E-Verify”)</td>
<td>Dashboard view of when tasks are due. Ability to manage I-9s at an intermediate user level except create Historical I-9s and Purge I-9 records. Ability to only view audit notes, audit trail, and I-9 record summary list. Ability to manage E-Verify except close batch cases when security role “with E-Verify” is selected.</td>
</tr>
</tbody>
</table>
### Training Curriculum by Role

<table>
<thead>
<tr>
<th>Roles</th>
<th>Training Curriculum</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client Admin</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <strong>Account Login</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Logout for Safety</strong></td>
</tr>
<tr>
<td></td>
<td>- Manage Local Employers (Campus Location)</td>
</tr>
<tr>
<td></td>
<td>- <strong>How to create and manage worksites</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Manage security groups</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Configure Email Alerts</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>User Training Report (E-Verify)</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Users</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Video: Create New User Account</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>How to create/edit users</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Profile Information</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>User Account Settings</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Assigning Permissions to a User</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Audit Notes</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Edit the default audit messages under the Features tab</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Impact to Audit Notes when changing Employer associate to the Employee Profile Page</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Security Role Permission Defaults for Auditing I-9s</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>FAQs</strong></td>
</tr>
<tr>
<td><strong>Advance User</strong></td>
<td></td>
</tr>
<tr>
<td>(Advance User with no E-Verify or Advance User with E-Verify)</td>
<td>- <strong>Account Login</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Logout for Safety</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Dashboard View</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Search for Existing Employee</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Form I-9 Preparation</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Create an Employee Profile</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Video: Creating a New Form I-9</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Steps to Create a New Form I-9</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Steps to Create a New Form I-9 with a Remote Section 1 (Employee Completes Section 1 Remotely)</strong></td>
</tr>
<tr>
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<td>- <strong>Steps to Create a New Remote Form I-9 with Remote Section 1 and Section 2 (Employee completes Section 1 Remotely and Remote Agent completes Section 2)</strong></td>
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<tr>
<td></td>
<td>- <strong>Section 1</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Section 1 Data</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Employee Signature (Electronic and Paper Signature)</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Preparer and/or Translator Certification</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Under Age 18 Employees</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Amend Section 1</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Section 2</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Section 2 Data Entry</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Employment Verification Documents</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Employment Information</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Employer Signature (Electronic and Paper Signature)</strong></td>
</tr>
</tbody>
</table>
• Amend Section 2
  • **Video:** How to change the start date after Section 2 completion

  • Section 3
    • Section 3 tab
    • Add Section 3 – New Name
      • **Video:** How to address a name change on the Form I-9
    • Add Section 3 – Rehire Employee
    • Add Section 3 – Reverification
    • Delete Section 3
    • Form I-9 Section 3 Addendum, Reverification Rules, Notes and Tasks Fields
      • Validation Alerts
      • Setting Termination Date

• **Mobile Form I-9 Processing**
  • Create Form I-9
  • Complete Section 1
  • Complete Section 2
    • Subsection A Employment Verification Document
    • Subsection B Employment Information
    • Subsection C Employer Electronic Signature
    • Form I-9 Complete

• Reports
  • I-9 Record Summary List
  • Purge Report
    • Purging is Permanent
  • I-9 Custom Reports
    • Step 1 – Chose Worksites and I-9 Information
    • Step 2 – Choose Report Fields
    • Run Report and Display Results
    • Saving and Exporting

• **Audit Notes**
  • Defining the Scope of an Internal Audit
  • Enhancements Overview
  • Creating Audit Notes
  • Custom Audit Notes
  • System Recommended Audit Notes
  • Accessing Audit Notes: Dashboard, Risk Alerts, and Incomplete I-9s Reports
  • Audit Management

• **E-Verify (Security role “with E-Verify” selected)**
  • **Video:** Duplicate Case Notifications
  • **Video:** E-Verify Photo Match
  • **Video:** E-Verify SSA/DHS Tentative Nonconfirmation (TNC)
  • E-Verify Case History
  • E-Verify Case Details Report
○ E-Verify Reporting and Follow-Up
  ▪ View E-Verify Cases
  ▪ E-Verify Duplicate Case Report

○ FAQs

Intermediate User
(Intermediate User with no E-Verify or Intermediate User with E-Verify)

○ Account Login
  ○ Logout for Safety

○ Dashboard View
  ○ Search for Existing Employee
  ○ Form I-9 Preparation
    ○ Create an Employee Profile
    ○ Video: Creating a New Form I-9
      ▪ Steps to Create a New Form I-9
      ▪ Steps to Create a New Form I-9 with a Remote Section 1 (Employee Completes Section 1 Remotely)
      ▪ Steps to Create a New Remote Form I-9 with Remote Section 1 and Section 2 (Employee completes Section 1 Remotely and Remote Agent completes Section 2)
    ○ Section 1
      ▪ Section 1 Data
      ▪ Employee Signature (Electronic and Paper Signature)
      ▪ Preparer and/or Translator Certification
      ▪ Under Age 18 Employees
      ▪ Amend Section 1
    ○ Section 2
      ▪ Section 2 Data Entry
      ▪ Employment Verification Documents
      ▪ Employment Information
      ▪ Employer Signature (Electronic and Paper Signature)
      ▪ Amend Section 2
      ▪ Video: How to change the start date after Section 2 completion
    ○ Section 3
      ▪ Section 3 tab
      ▪ Add Section 3 – New Name
        ○ Video: How to address a name change on the Form I-9
      ▪ Add Section 3 – Rehire Employee
      ▪ Add Section 3 – Reverification
      ▪ Delete Section 3
      ▪ Form I-9 Section 3 Addendum, Reverification Rules, Notes and Task Fields
  ○ Validation Alerts
  ○ Setting Termination Date

○ Mobile Form I-9 Processing
  ○ Create Form I-9
Complete Section 1
Complete Section 2
  - Subsection A Employment Verification Document
  - Subsection B Employment Information
  - Subsection C Employer Electronic Signature
  - Form I-9 Complete

- Reports
  - I-9 Record Summary List
  - Purge Report
    - Purging is Permanent
  - I-9 Custom Reports
    - Step 1 – Chose Worksites and I-9 Information
    - Step 2 – Choose Report Fields
    - Run Report and Display Results
    - Saving and Exporting

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  - Creating Audit Notes
  - Custom Audit Notes
  - System Recommended Audit Notes
  - Accessing Audit Notes: Dashboard, Risk Alerts, and Incomplete I-9s
  - Audit Management

- E-Verify (Security role “with E-Verify” selected)
  - Video: Duplicate Case Notifications
  - Video: E-Verify Photo Match
  - Video: E-Verify SSA/DHS Tentative Nonconfirmation (TNC)
  - E-Verify Case History
  - E-Verify Case Details Report
  - E-Verify Reporting and Follow-Up
    - View E-Verify Cases
    - E-Verify Duplicate Case Report

- FAQs

Basic User
(Basic User with no E-Verify or Basic User with E-Verify)

- Account Login
  - Logout for Safety
- Dashboard View
- Search for Existing Employee
- Form I-9 Preparation
  - Create an Employee Profile
  - Video: Creating a New Form I-9
    - Steps to Create a New Form I-9
    - Steps to Create a New Form I-9 with Remote Section 1 (Employee Completes Section 1 Remotely)
    - Steps to Create a New Remote Form I-9 with Remote
Section 1 and Section 2 (Employee completes Section 1 Remotely and Remote Agent completes Section 2)

- **Section 1**
  - Section 1 Data
  - Employee Signature (Electronic and Paper Signature)
  - Preparer and/or Translator Certification
  - Under Age 18 Employees
  - Amend Section 1

- **Section 2**
  - Section 2 Data Entry
  - Employment Verification Documents
  - Employment Information
  - Employer Signature (Electronic and Paper Signature)
  - Amend Section 2
  - Video: How to change the start date after Section 2 completion

- **Section 3**
  - Section 3 tab
  - Add Section 3 – New Name
    - Video: How to address a name change on the Form I-9
  - Add Section 3 – Rehire Employee
  - Add Section 3 – Reverification
  - Form I-9 Section 3 Addendum, Reverification Rules, Notes and Tasks Fields

- Validation Alerts
- Setting Termination Date

- Mobile Form I-9 Processing
  - Create Form I-9
  - Complete Section 1
  - Complete Section 2
    - Subsection A Employment Verification Document
    - Subsection B Employment Information
    - Subsection C Employer Electronic Signature
    - Form I-9 Complete

- Reports
  - I-9 Record Summary List
  - I-9 Custom Reports
    - Step 1 – Chose Worksites and I-9 Information
    - Step 2 – Choose Report Fields
    - Run Report and Display Results
    - Saving and Exporting

- Audit Notes (Basic users are only allowed “view” access from the summary tab)
  - Defining the Scope of an Internal Audit
  - Enhancements Overview

- **E-Verify (Ability to manage E-Verify except to batch close Employment**
Authorized cases when security role “with E-Verify” is selected.

- **Video:** Duplicate Case Notifications
- **Video:** E-Verify Photo Match
- **Video:** E-Verify SSA/DHS Tentative Nonconfirmation (TNC)
- E-Verify Case History
- E-Verify Case Details Report
- E-Verify Reporting and Follow-Up
  - View E-Verify Cases
  - E-Verify Duplicate Case Report

- **FAQs**