

PeopleSoft HCM 9.0, 9.1, and 9.2

Human Resources: I-9 Form Enhancements

April 2013



PeopleSoft HCM 9.0, 9.1, and 9.2 PeopleBook Update: Human Resources: Form I-9

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Contents

Introduction	4
Managing I-9 Information	5
Understanding I-9 Information Management	5
Pages Used to Manage I-9 Information	7
I-9 Form - Employee Information and Attestation Page	9
I-9 Form – Preparer and/or Translator Certification Page	13
I-9 Form - Employer or Authorized Representative Review and Verification Page	15
I-9 Form - Reverification and Rehires Page	20
Print I-9 Forms Page	26
I-9 Receipt/Expiration Report Page	26
Archiving I-9 Data	27

Introduction

This document reflects the pages and fields that support the current I-9 Form.

As of March 08, 2013, the U.S. Citizenship and Immigration Services (USCIS) issued an updated Form I-9. The form is available for immediate use. However, employers who need to make necessary updates to their business processes to use new Form I-9 may continue to use existing form until May 7, 2013 date. After May 7, 2013, all employers must use the revised Form I-9 for each new employee hired in the United States.

For Spanish users, the PeopleSoft application supports the translation of the pages and provides links to the Spanish instructions.

Managing I-9 Information

This document provides an overview of managing I-9 information and discusses how to:

- Complete and submit Section 1 of the I-9 Form (completed by the employee).
- Complete the preparer or translator certification (applicable only in specific situations).
- Complete sections 2 and 3 of the I-9 Form (completed by the employer).
- Update or request a new I-9 Form.
- Print I-9 Forms.
- Run the I-9 Receipt/Expiration report.
- Archive I-9 data.

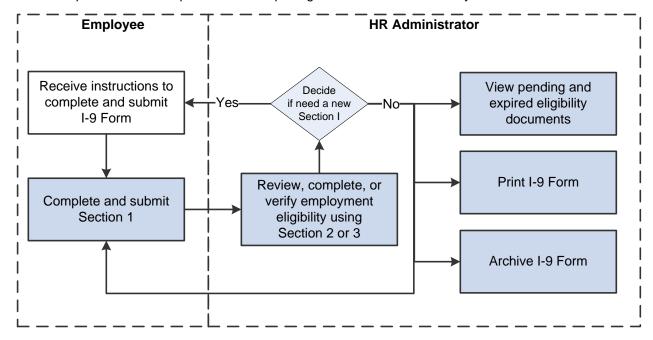
Understanding I-9 Information Management

The Immigration and Nationality Act requires United States employers to complete and store I-9 Forms. Employers may process paper I-9 Forms and store them in electronically or complete and retain the I-9 Forms solely in electronic format.

PeopleSoft Human Resources enables you to collect, store, and manage all I-9 information in compliance with the Immigration and Nationality Act. This includes employee self service functions to complete and submit the employee I-9 information, and functionality for the employer to complete the required employer sections of the I-9 Form. The application provides components to report and process I-9 information, including notification of expiration dates, storing, printing, and archiving.

Image: Process flow for completing the I-9 Form

This example illustrates the process for completing the I-9 Form electronically



Completing the I-9 Form online requires the following steps:

- 1. An employee must submit employment verification information on the first day of his or her employment. The employee can fill out the identification and citizenship information for section 1 on the self service I-9 Form Employee Information and Attestation page.
- 2. After the employee submits this information, the HR administrator will:
 - a. Review and complete sections 2 and 3 of the I-9 Form required by the employer using the Complete/Reverify EE I-9 Form component.
 - If a new I-9 is needed, the administrator can send notification to the employee to complete a new I-9 Form.
 - b. Manage the I-9s by viewing pending and expired documents, printing I-9 Forms, or archive data that is not longer needed.

Pages Used to Manage I-9 Information

Page Name	Definition Name	Navigation	Usage
I-9 Form - Employee Information and Attestation	HR_I9_EE	Self Service, Personal Information, Complete and Submit I-9 Form, Employee Information and Attestation	Enter employee self identification and employment authorization information for the I-9 Form.
I-9 Form - Preparer Notification	HR_I9_PREP_NOTE	Select one or more check boxes on the I-9 Form - Employee Information and Attestation page and click the Accept button.	View a notification that the prepare of the employee's I-9 must complete the Preparer and/or Translator Certification page in order to complete the submission.
I-9 Form - Preparer and/or Translator Certification	HR_I9_PREPARER	Click the OK button on the I–9 Form - Preparer Notification page.	Enter the name and address of the preparer who assisted the employee in the completion of the I-9 Form page.
			This page is completed by the person who assisted the employee in the completion of the I-9 Form page. The system displays this page only if you selected one or more check boxes in the Minor and Special Placement Details section of the I-9 Form - Employee Information and Attestation page.
I-9 Form - Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Accept button on the. I-9 Form - Employee Information and Attestation or I-9 Form – Preparer and/or Translator Certification page.	View a notification that you have successfully submitted the employee portion of the I-9 Form. This page appears after the employee and preparer or translator successfully complete required information and submit the self service I-9 Form.
I-9 Form - Employer or Authorized Representative Review and Verification	HR_I9_ADMIN_SEC2	Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Employer or Authorized Representative Review and Verification	Complete sections 2 and 3 of the I-9 Form. These sections are completed by the employer.

Page Name	Definition Name	Navigation	Usage
I-9 Form – Reverification and Rehires	HR_I9_ADMIN_SEC3	Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Reverification and Rehires	Update a completed I-9 Form or request that the employee submit a new form.
Print I-9 Forms	HR_RUNCTL_I9_FORM	Workforce Administration, Personal Information, I-9 Forms, Print I-9 Forms, Print I-9 Forms	Generate the I-9 Forms in PDF format.
I-9 Receipt/Expiration Report	HR_RUNCTL_I9_VERFY	Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/Expiration Report, I-9 Receipt/Expiration Report	Identify I-9 Forms that require re-verification and notify administrators.

I-9 Form - Employee Information and Attestation Page

Use the I-9 Form - Employee Information and Attestation page (HR_I9_EE) to enter employee self identification and employment authorization information for the I-9 Form.

Navigation

Self Service, Personal Information, Complete and Submit I-9 Form, Employee Information and Attestation

Image: I-9 Form - Employee Information and Attestation page, Section 1 (1 of 2)

This example illustrates the fields and controls on the I-9 Form - Employee Information and Attestation page, Section 1 (1 of 2).

I-9 Form			
Employee Info	ormation and Attestation	า	
Betty Locherty		Social Security Nbr:	341-95-7245
Global Business Institu	ute 9999	Date of Birth:	07/06/1945
read instructions carefrof this form. ANTI-DISC Employers CANNOT sindividual because of a Read all instructions and Select I have a	e Employment Eligibility Verification form ully before completing this form. The ins CRIMINATION NOTICE: It is illegal to dis pecify which document(s) they will accept future expiration date may also constituted are completed and submitted an I-9 omit a new I-9 Form	structions must be available of criminate against work eligibe of from an employee. The refute illegal discrimination. In this page: I-9 Instructions	during completion le individuals. usal to hire an for Employee
Home Address			
643 Robinson St Buffalo, NY 74940	<u>Update Home Addres</u>	<u>ss</u>	
Contact Information (o	ptional)		
Email Address:	HCMGENUser1@ap6023fems.us.ora	cle.com	
Telephone:	555/123-4567		
Other Names Used (if	any)		
Other Names:			

Image: I-9 Form - Employee Information and Attestation page, Section 1 (2 of 2)

This example illustrates the fields and controls on the I-9 Form - Employee Information and Attestation page, Section 1 (2 of 2).

	ler penalty of perjury, that I am (select one of the following): en of the United States	
· Andrews	itizen national of the United States	
Alawii	Il Permanent Resident Alien Registration Number/USCIS Number:	_
An alie	n authorized to work until (expiration date, if applicable, mm/dd/yyyy)	
Please	rovide your Alien Registration/USCIS Number or Form I-94 Admission Number.	
Alien Re	gistration Number/USCIS Number:	
	4 Admission Number:	
63.5		
Source	of Admission Number:	
Foreign	Passport Number:	
Country	of Issuance:	
inor and S	pecial Placement Details r legal guardian of a minor (individual under age 18) OR a representative or a legal o	
f a person lease sele	who meets the Special Placement criteria, as defined by the INS, completes this for ct the following as they apply. Placement Employee unable to present a List A or List B document	
f a person lease sele Special	who meets the Special Placement criteria, as defined by the INS, completes this for ct the following as they apply.	
f a person lease sele Special Minor u	who meets the Special Placement criteria, as defined by the INS, completes this for ct the following as they apply. Placement Employee unable to present a List A or List B document	

Employees use this page to complete and submit Section 1 of their I-9 Forms. Employees can complete and submit more than one I-9 Form. Employees cannot modify I-9 Forms after submission and can view only the most recent submission.

Fields and links on this page are available only when you are entering or completed an I-9 Form. If an I-9 Form has been entered into the system, this page is display only with the exception of the link to the I-9 instructions for the employee.

I-9 Instructions for Employee

Select this link to open a new browser window with the I-9 Form in PDF format that has instructions for completing the form.

Note. The system uses the sign on base language of the user to determine the language (English or Spanish) and appropriate link to display here.

Select Select this button to enable the page for data entry and submit a new I-9 Form.

Home Address

Home Address Displays the employee's preferred address stored in personal data.

Update Home AddressSelect this link to open the Home and Mailing Address page in employee self service to

update the address information.

Contact Information (optional)

Email Address and Telephone

Displays the employee's preferred email address and phone number by default. The employee can clear or enter different values for these fields; however, the information the employee enters here is for I-9 purposes only and does not update the email address or telephone number in personal data.

Other Names Used (if any)

Other Names

Displays the Maiden or Other names values from the Additional Names component by default, if available. When more than one name exists, the names are separated by a semicolon (;).

The employee can clear or enter a different value in this field. The information the employee enters here is for I-9 purposes only and does not update the other names in the Additional Names component.

Citizenship and Employment Authorization

Select the option for your eligibility type. You must select one of the options and provide any additional data that is associated with the selected option. Options are:

A citizen of the United States Select this option if you are a citizen of the United States.

A noncitizen national of the United

States

Select this option if you are a noncitizen national of the United States.

A lawful Permanent Resident Select this option if you have received legal permanent residency in the United States.

Alien Registration Number /USCIS

Number

Enter your lawful Permanent Resident alien number or USCIS number. This field is mandatory if you select the option stating that you are A lawful Permanent Resident.

An alien authorized to work

Select this option when you are an alien but have been granted authorization to work in the

United States.

The following expiration and alien registration number fields are available when you select the An alien authorized to work option.

until (expiration date, if applicable, mm/dd/yyyy) (month/day/year) (Optional) Enter the date until which you are authorized to work. This field is mandatory if you select the option stating that you are an alien authorized to work. There are certain types of aliens having work authorization that does not expire - e.g. refugees or asylees.

Alien Registration Number/USCIS

Number

Enter your temporary alien number.

Form I-94 Admission Number

Enter your assigned number.

Note. You must enter either an Alien Registration Number/USCIS Number or a Form I-94 Admission Number value when you select the option stating that you are an alien authorized to work in order to submit the form.

Source of Admission Number Select either Customs and Border Protection or US Citizenship and Immigration. This field

becomes available when you enter a Form I-94 number.

Foreign Passport Number Enter the passport number. This field is available when you select the *Customs and Border*

Protection option in the Source of Admission Number drop-down field.

Country of Issuance Select the country that issued the passport. This field is available when you select the

Customs and Border Protection option in the Source of Admission Number drop-down field.

Minor and Special Placement Details

Select the appropriate check boxes. You can select more than one check box, if applicable. If you select any check box in this section, the preparer or translator must complete the Preparer and/or Translator Certification page before submitting the form.

Submitting the Form

Accept

Select this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page. If you selected any of the Minor and Special Placement Details check boxes, the system will display the I-9 Form - Preparer and/or Translator Certification page where the person who assisted the employee with the I-9 will enter name and address information.

I-9 Form – Preparer and/or Translator Certification Page

Use the I-9 Form - Preparer and/or Translator Certification page (HR_I9_PREPARER) to enter the name and address of the preparer who assisted the employee in the completion of the I-9 Form page.

The system displays this page only if you selected one or more check boxes in the Minor and Special Placement Details section of the I-9 Form - Employee Information and Attestation page.

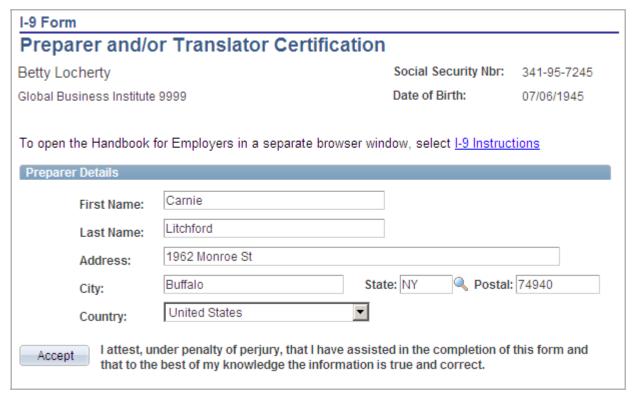
Navigation

PeopleBook Update

Click the Accept button on the I-9 Form - Employee Information and Attestation page, and then the OK button on the I-9 Form - Preparer Notification page.

Image: I-9 Form - Preparer and/or Translator Certification page

This example illustrates the fields and controls on the I-9 Form - Preparer and/or Translator Certification page.



I-9 Instructions

Select this link to access the Handbook for Employers PDF.

Note. The system uses the sign on base language of the user to determine the language (English or Spanish) and appropriate link to display.

Address, City, State, Postal, and Country

Enter the preparer's first and last name in these fields. These fields are required.

Enter the preparer's address information in these fields. These fields are required.

The State field is disabled if the country is either Canada or Mexico.

The Country field value does not appear on the I-94 Form but is collected for instances where the preparer resides in Canada or Mexico. When this is the case, either CAN or MEX will appear in the Preparer's State field on the printed form.

Accept Select this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page

I-9 Form - Employer or Authorized Representative Review and Verification Page

Use the I-9 Form - Employer or Authorized Representative Review and Verification page (HR_I9_ADMIN_SEC2) to complete sections 2 and 3 of the I-9 Form.

After the employee has completed and submitted the I-9 Form, the employer completes the remaining sections.

Navigation

Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Employer or Authorized Representative Review and Verification

Image: I-9 Form – Employer or Authorized Representative Review and Verification page (1 of 4)

This example illustrates the fields and controls on the I-9 Form – Employer or Authorized Representative Review and Verification page (1 of 4).

I-9 Form

Employer or Authorized Representative Review and Verification

 Rosanna Channing
 Social Security Nbr:
 211-15-3591

 4026 Cy Avenue
 Date of Birth:
 01/04/1967

 Casper, WY 82604
 Other Names:
 Rosanna Martin

Employee Sign Date: 04/12/2013

Citizenship and Employment Authorization

- A citizen of the United States
- A noncitizen national of the United States
- A lawful Permanent Resident Alien Registration Number/USCIS Number:
- An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy) 04/30/2016

Please provide your Alien Registration/USCIS Number or Form I-94 Admission Number.

Alien Registration Number/USCIS Number:

Form I-94 Admission Number: 1234567890

Source of Admission Number: Customs and Border Protection

Foreign Passport Number: 1234567890
Country of Issuance: Belgium

Image: I-9 Form – Employer or Authorized Representative Review and Verification page (2 of 4)

This example illustrates the fields and controls on the I-9 Form – Employer or Authorized Representative Review and Verification page (2 of 4).

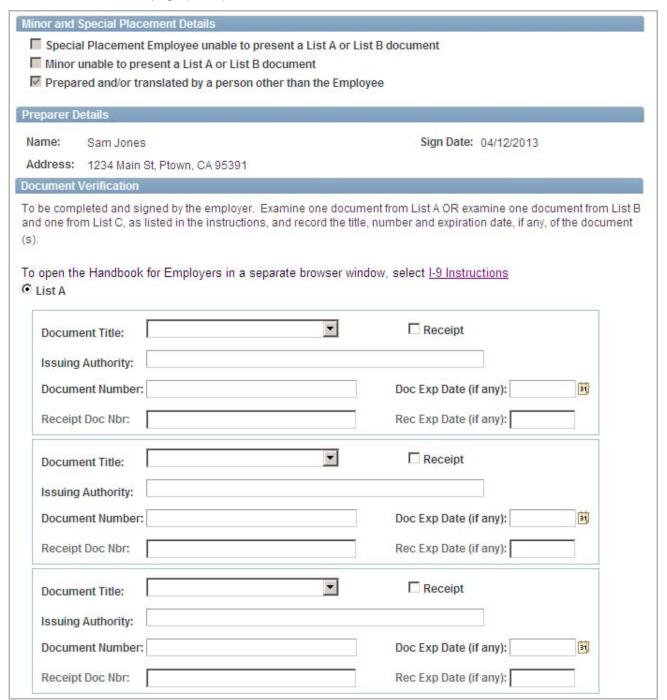


Image: I-9 Form – Employer or Authorized Representative Review and Verification page (3 of 4)

This example illustrates the fields and controls on the I-9 Form – Employer or Authorized Representative Review and Verification page (3 of 4).

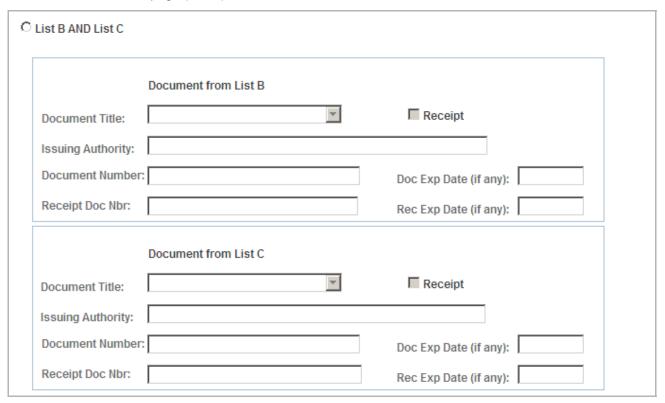
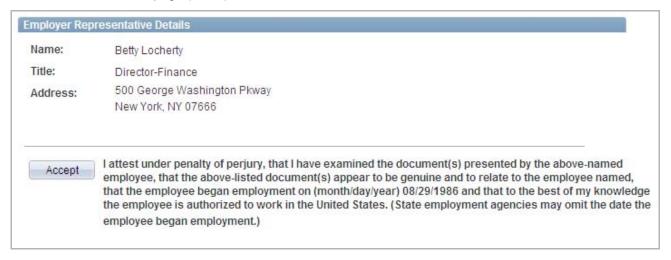


Image: I-9 Form – Employer or Authorized Representative Review and Verification page (4 of 4)

This example illustrates the fields and controls on the I-9 Form – Employer or Authorized Representative Review and Verification page (4 of 4).



Citizenship and Employment Authorization

This section displays the citizenship and employment authorization information entered by the employee on the form.

Minor and Special Placement Details

This section displays the minor and specials placement details selected by the employee on the form. The page populates the following fields based on the options selected by the employee:

- If the employee selected the Special Placement option, then the List B AND List C option is selected by default and the text *Special Placement* appears in the Document Number field.
- If the employee selected the Minor check box, then the List B AND List C option is selected by default and the text *Individual under age 18* appears in the Document Number field.
- If the employee selected both the Special Placement and the Minor check boxes, then the List B AND List C option is selected by default and the Special Placement and Individual under age 18 text entry appears in the Document Number field.

Preparer Details

This section displays the name and address information entered by the preparer on the I-9 Form - Preparer and/or Translator Certification page.

Document Verification

I-9 Instructions Select this link to access the Handbook for Employers PDF.

Note. The system uses the sign on base language of the user to determine the language (English or Spanish) and appropriate link to display here.

List A or List B AND List C Select the option that corresponds to the type of citizenship document provided by the

employee. You must select either List A or List B AND List C and enter the information.

If List A is chosen, at least one of the three document group box details is required. These

options are mutually exclusive.

Document Title Record the type of documentation provided by the employee. There are separate fields for

each document type (A, B and C).

Issuing Authority Enter the name of the agency that issued the document.

Receipt Select this check box to indicate that the employee has applied for the document.

The default setting is deselected, which grays out and disables the Receipt Document

Number field and corresponding Doc Exp Date (if any) field.

When selected, the Receipt Doc Nbr and Rec Exp Date (if any) fields are visible and the Document Number and Doc Exp Date (if any) fields are no longer available for entry.

After you save this page you cannot deselect this check box.

Document Number Enter the number of the actual document.

Doc Exp Date (if any) (document expiration date)

(Optional) Record the expiration date, if any, of the document entered.

Receipt Doc Nbr (receipt document

number)

Enter the receipt number of the documentation application. The receipt document number may be different from the actual document number.

This field appears only if the Receipt check box is selected.

Rec Exp Date (if any) (receipt expiration date)

(Optional) Record the expiration date, if any, of the receipt document entered.

Employer Representative Details

Name Displays the name of the administrator who is submitting the data.

Title Displays the job title of the administrator who is submitting the data.

Address Displays the current company address.

Accept Click this button to save the information you entered.

I-9 Form - Reverification and Rehires Page

Use the I-9 Form - Reverification and Rehires page (HR_I9_ADMIN_SEC3) to update a completed I-9 Form or request that the employee submit a new form.

Navigation

Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Reverification and Rehires

Image: I-9 Form - Reverification and Rehires page (1 of 4)

This example illustrates the fields and controls on the I-9 Form - Reverification and Rehires page (1 of 4).

I-9 Form

Reverification and Rehires

Jason Andrews Social Security Nbr: 991-12-9991
58 Kirby Drive Date of Birth: 05/01/1971

Walnut Creek, CA 94596 Other Names:

Employee Sign Date: 05/12/2006

Citizenship and Employment Authorization

- A citizen of the United States
- A noncitizen national of the United States
- A lawful Permanent Resident Alien Registration Number/USCIS Number:
- An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy)

Please provide your Alien Registration/USCIS Number or Form I-94 Admission Number.

Alien Registration Number/USCIS Number:

Form I-94 Admission Number:

Source of Admission Number:

Foreign Passport Number:

Country of Issuance:

Minor and Special Placement Details

- Special Placement Employee unable to present a List A or List B document
- Minor unable to present a List A or List B document
- Prepared and/or translated by a person other than the Employee

Image: I-9 Form - Reverification and Rehires page (2 of 4)

This example illustrates the fields and controls on the I-9 Form - Reverification and Rehires page (2 of 4).

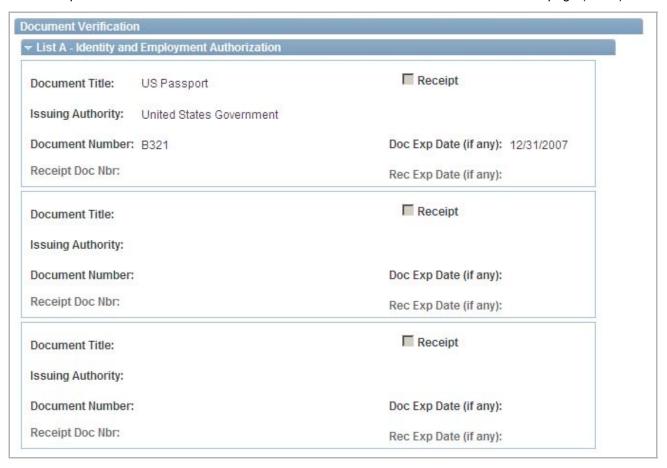


Image: I-9 Form - Reverification and Rehires page (3 of 4)

This example illustrates the fields and controls on the I-9 Form - Reverification and Rehires page (3 of 4).

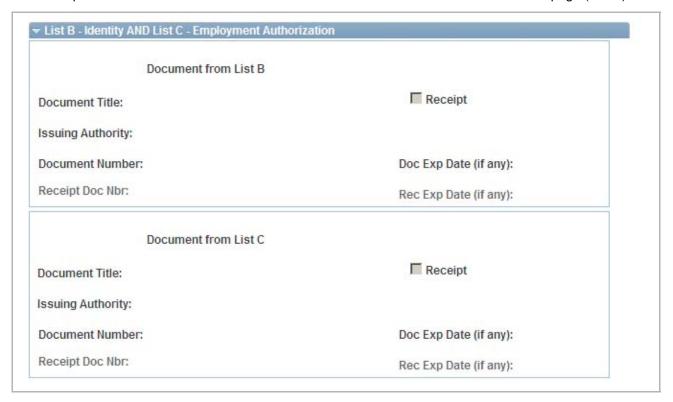
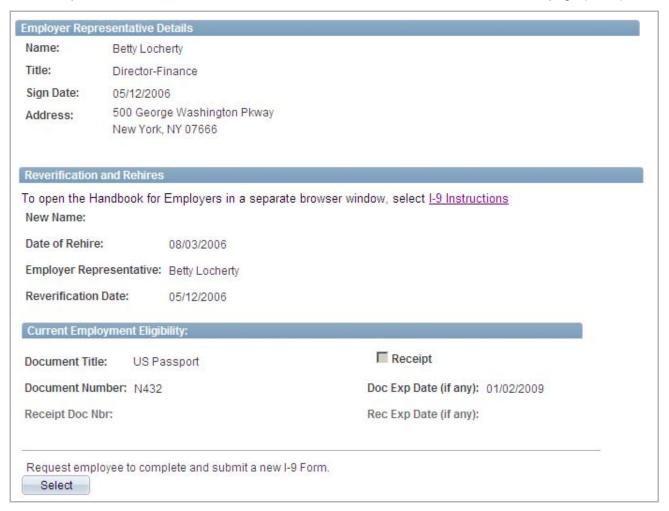


Image: I-9 Form - Reverification and Rehires page (4 of 4)

This example illustrates the fields and controls on the I-9 Form - Reverification and Rehires page (4 of 4).



HR administrators use this page to view completed I-9 documentation and enter additional information, if applicable. If an employee is rehired within three years of termination, or if the original document has expired, employers may reverify or update the original I-9 after it is submitted. An I-9 Form can only be updated or reverified one time (including receipt and actual documentation).

If new information needs to be entered and actual documentation information already exists, all fields will be display only and the employee and employer must complete a new I-9 Form. The administrator can send an email notification to the employee requesting a new I-9 Form from this page. The administrator is able to view all forms completed by employees, including history.

The employer is not allowed to make any changes to the form after it is saved unless the Receipt check box is selected. In this case, you can enter the actual information for the specific document that was flagged as Receipt, but only the Receipt Doc Nbr and Rec Exp Date fields. The entry in the Document Title field cannot be changed. After the additional field entries are completed and the form is saved, the Receipt check box and document number and expiration date fields are grayed out and cannot be edited.

Citizenship and Employment Authorization

This section displays the citizenship and employment authorization information entered by the employee on the form.

Minor and Special Placement Details

This section displays the minor and specials placement details selected by the employee on the form.

Preparer Details

This section displays the name and address information entered by the preparer on the I-9 Form - Preparer and/or Translator Certification page.

Document Verification

This section displays the document details entered by the employer. The page will display either List A or List B AND List C, depending on the document types that were entered. The page will expand the list that is selected and collapse the other list, which can be expanded for viewing purposes.

Employer Representative Details

Displays the name, title, and company address of the administrator who submitted the data and the date the I-9 was submitted.

Reverification and Rehires

I-9 Instructions Select this link to access the Handbook for Employers PDF.

Note. The system uses the sign on base language of the user to determine the language (English or Spanish) and appropriate link to display here.

New Name Displays the employee's current name if it is different from the name initially saved on the

form.

Date of Rehire Displays the most current rehire date by default in this field.

Employer Representative Displays the name of the administrator responsible for submitting the I-9.

Reverification Date Displays the reverification date.

Current Employment Eligibility

Document Title Enter the type of documentation being reverified or for the employee being rehired.

Receipt Select this check box to indicate that the employee has applied for the reverified or rehire

document.

The default setting is deselected, which grays the Receipt Doc Nbr field and corresponding

Rec Exp Date field.

When the Receipt check box is selected, the Receipt Doc Nbr and Rec Exp Date fields are

available for entry. After you save this page you cannot deselect this check box.

Document Number Enter the actual document number.

Doc Exp Date (if any) (Optional) Record the document expiration date, if any.

Receipt Doc Nbr Enter the receipt number for the document application receipt.

Rec Exp Date (if any) (Optional) Record the receipt expiration date, if any.

Accept Click this button to save the form.

Select Click this button to send an email notification to the employee requesting a new I-9 Form.

Print I-9 Forms Page

Use the Print I-9 Forms page (HR_RUNCTL_I9_FORM) to generate the I-9 Forms in PDF format.

Navigation

Workforce Administration, Personal Information, then select I-9 Forms, Print I-9 Forms, Print I-9 Forms

Image: Print I-9 Forms page

This example illustrates the fields and controls on the Print I-9 Forms page. You can find definitions for the fields and controls later on this page.



From Date and Thru Date

Use these fields to determine effective dates to extract when running the report. Both fields are required.

By Company or By Employee

Run the report using one of these options. Use the lookup icon to enter a company code or an employee ID.

I-9 Receipt/Expiration Report Page

Use the I-9 Receipt/Expiration Report page (HR_RUNCTL_I9_VERFY) to identify I-9 Forms that require reverification and notify administrators.

Navigation

Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/Expiration Report, I-9 Receipt/Expiration Report

Image: I-9 Receipt/Expiration Report page

This example illustrates the fields and controls on the I-9 Receipt/Expiration Report page. You can find definitions for the fields and controls later on this page.



From Date and Thru Date

Use these fields to define the effective dates for the report. Both fields are required.

Company This is an optional field. Entering a value will limit the report output to employees for a

specific company as of the date that the employee submitted the I-9 Form.

Expired Documents Select this check box to have the report list I-9 Forms with expiration dates within the

specified date range.

Application Update Needed Select to have the process find all documents that have a Receipt check box selected. The

process compares the I-9 submission date with the date range and includes all employees

whose I-9 date plus 90 days is within the date range.

Note: You must select either the Expired Documents or the Application Update Needed check box to run the report.

Add into Worklist

Select this check box to have the administrator receive a worklist entry for each employee form listed in the report.

Archiving I-9 Data

See the product documentation for *PeopleTools: Data Management*, "Using PeopleSoft Data Archive Manager."