

MITR/TECH

Tracker I-9 Forced Attachments
Quick Start Guide

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Background and Introduction

We are excited to announce that our new **Forced Attachments** feature is now available. Do you have challenges with users not following your company's document retention policy? If so, you're not alone.

Up until now your attachment settings, which are part of your Employer set up in Tracker, prompt users to upload copies of List A, B or C documents when required. If one or more attachments isn't included then an alert is presented to the user. However, they can still sign or amend Section 2 or 3 of the Form I-9 without an attachment(s).

If the new **Forced Attachments** feature is enabled, then based on your Employer attachment settings a user will be prevented from signing or amending Section 2 or 3 of the Form I-9 if they neglect to include one or more required attachments.

You must opt in to take advantage of this new feature. Continue reading to find out more about this new feature and the steps you need to take to start taking advantage of this new exciting feature.

Forced Attachment Feature Summary

Client Configuration and Feature Enablement

Tracker's Forced Attachments feature is available to all customers at no additional cost. However, the feature needs to be enabled by a customer's Client Admin user. Follow the short steps listed below if you would like to turn on the feature.

Attachments Setting

Follow the steps below to enable the Forced Attachments feature:

1. Access the Tracker application as a Client Admin user.
2. Select the appropriate Employer record listed on the Home page.
3. Scroll to the Task Options section listed at bottom of the Employer Setup page.
4. Review/confirm/update your current **Attachments** setting. Your **Attachments** setting will remind users to include copies of List A, B or C documents based on this setting.
 - a. **No Attachments**: Selecting this option will configure the Employer to disable all required attachment alerts when completing the Form I-9. This option is not available for E-Verify

Employers.

- b. **E-Verify Photo Match:** Selecting this option will configure the Employer to display an alert when copies of the appropriate List A documents are not retained with the Form I-9. This option is only available for E-Verify Employers.
 - c. **All Attachments:** Selecting this option will configure the Employer to display an alert when copies of List A, B and C documents are not retained with the Form I-9.
 - d. **All Attachments as of date:** Selecting this option will configure the Employer to display an alert when copies of List A, B and C documents are not retained with the Form I-9 on or after the designated date.
5. A new option titled **Attachment Required For Signature** has been added to the **Attachments** setting area. There are two configuration options to choose from.
- a. **No:** Indicates that attachments are not mandatory. Selecting **No** means the system may display a warning when a user attempts to sign/amend Section 2 or Section 3 of the Form I-9 and one or more attachments are missing. The warning will display based on the **Attachments** setting. The warning does not prevent the user from signing/amending Section 2 or Section 3.

Note: The default setting is **No** for existing or newly added Employers.

- b. **Yes:** Indicates that attachments are mandatory. Selecting Yes means the system will not permit the user to sign/amend Section 2 or Section 3 of the Form I-9 if one or more required attachments are missing, even if the Section 2 or Section 3 signature due date is past the compliance deadline. When set to Yes, the user does not receive an alert. Instead, a validation error will be displayed. The **Attachments** setting determines the documents that are considered to be required.

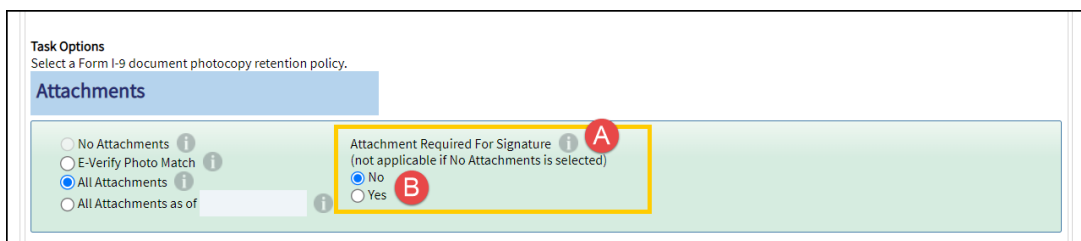


Figure 1: Attachment Required For Signature option

New Forced Attachment Override Feature

If the **Attachment Required For Signature** option is set to **Yes**, then based on the Employer’s **Attachments** setting users will not be able to sign or amend Section 2 or Section 3 of the Form I-9 if one or more required attachments aren’t included. However, I-9 Managers who are assigned to the Advanced User With E-Verify or Advanced User Without E-Verify Security Role will have access to an override feature. This feature will allow the I-9 Manager to override the **Attachment Required For Signature** option for a particular Form I-9. More information on this feature is described later in the guide in the **Forced Attachment Override on UI** section.

New Security Role Permission

For customers who use our Security Roles Management feature to create custom I-9 Manager Security Roles, a new permission associated with the Forced Attachments feature has been implemented. Permission **5.2.6 – Forced Attachment Override** has been added to the list of Advanced Permissions found under the Form I-9 Feature Permissions section on the Form I-9 page, see screenshot below. This permission is disabled by default. Client Admin users can enable this permission on any new or existing Custom Roles. If the permission is enabled then an I-9 Manager will be able to override the **Attachment Required For Signature** option for a particular Form I-9.

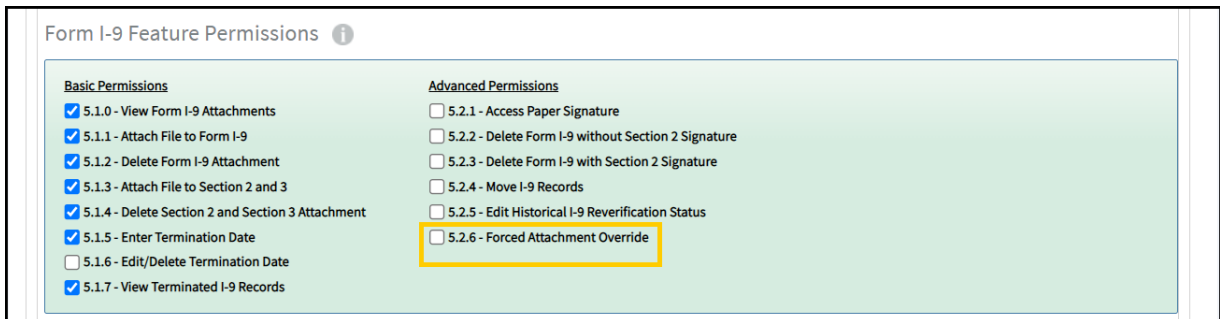


Figure 2: Forced Attachment Override permission

Forced Attachment Workflow/UI Changes

The following changes are observed when the **Attachment Required For Signature** option is enabled in conjunction with the Employer **Attachments** setting. Please note that the screenshots below are views when accessing the Tracker desktop version of the application. These changes are also applicable when accessing Tracker on a mobile device.

Section 2 Data Entry Page Changes

While the Section 2 page layout may look familiar to you, there are two main changes that should be noted.

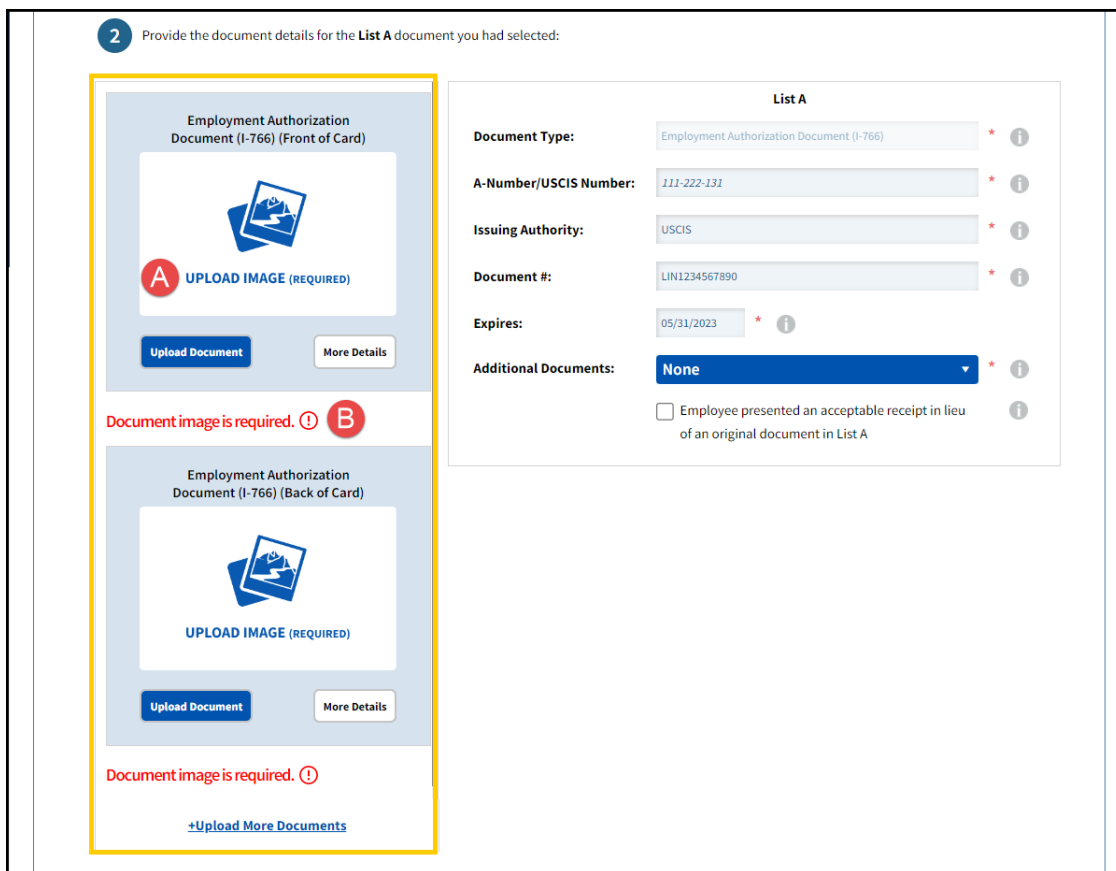


Figure 3: Employment Verification Documents layout/validation changes (Section 2)

A. Enabling the **Attachment Required For Signature** setting along with the Employer **Attachments** setting will display the **UPLOAD IMAGE (REQUIRED)** tag on the image tile if an image is required. The user is prompted to attach the necessary file(s) before they can sign or amend Section 2.

B. An error message will be displayed with a tooltip if the user attempts to sign or amend Section 2 and

one or more of the required attachments are not included.

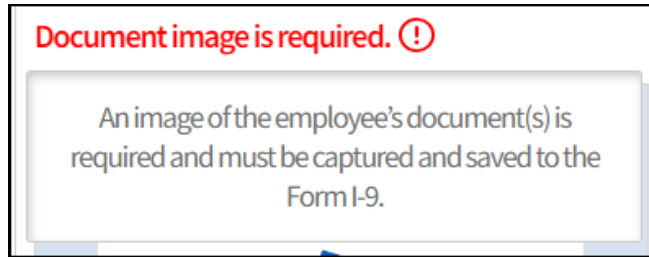


Figure 4: Tooltip

Section 3 Data Entry Page Changes

The following changes are observed on the Employment Verification Documents page in Section 3 when the **Attachment Required For Signature** option is enabled in conjunction with the Employer **Attachments** setting.

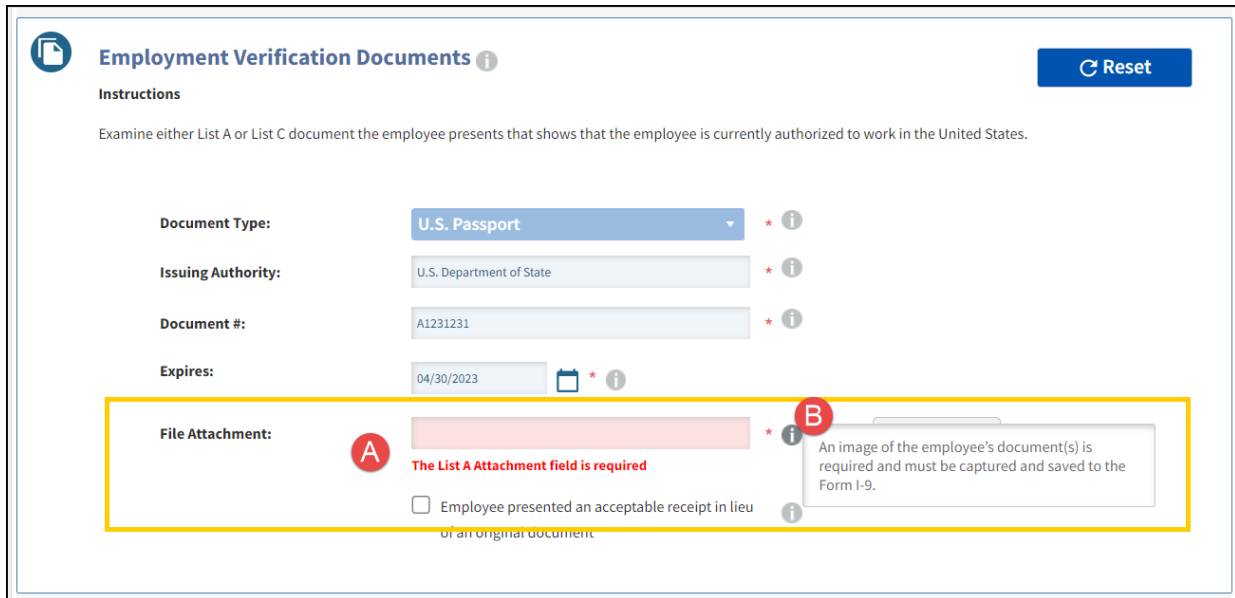


Figure 5: Employment Verification Documents layout/validation changes (Section 3)

- A. If applicable, an error message will be displayed under the **File Attachment** field if a user attempts to sign or amend Section 3 and doesn't include a required attachment.
- B. Tooltip is added to the File Attachment field.

Forced Attachment Override on UI

Under the Manage I-9 section of the **Administrative Options** menu, a new link labeled **Edit Section 2/3 Document Attachment Settings** will be visible if the following conditions are met:

1. Attachment Required For Signature configuration is set to Yes.
2. The I-9 Manager has permissions to the Forced Attachments Override setting.

Note: This feature will be only available to the I-9 Manager when accessing Tracker via desktop computer. This override feature is not available if accessing Tracker via a mobile device.

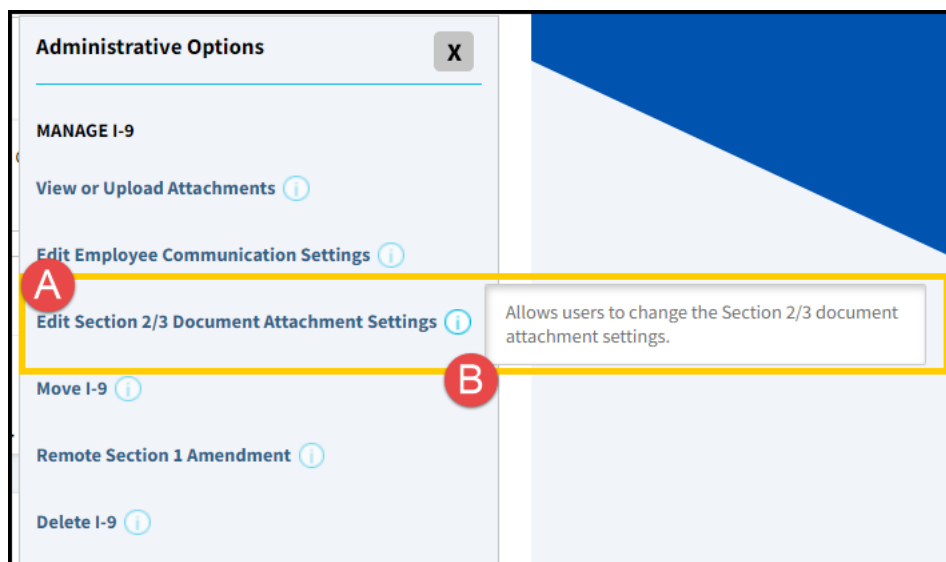


Figure 6: Administrative Options

- A. New Edit Section 2/3 Document Attachment Settings option.
- B. The new option is accompanied by a tooltip.

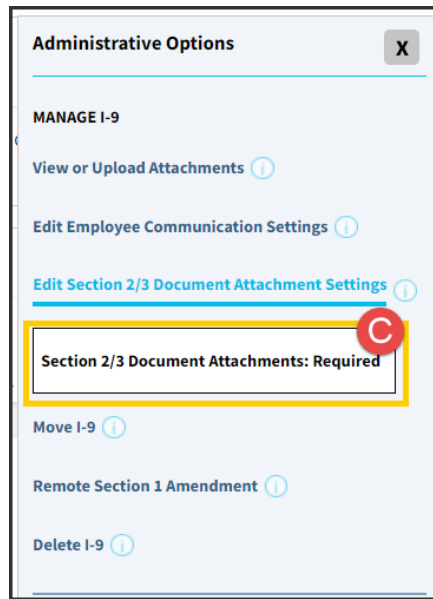


Figure 7: Displays current Attachment Required For Signature setting

C. If the I-9 Manager hovers over the link it will display the current **Attachment Required For Signature**.

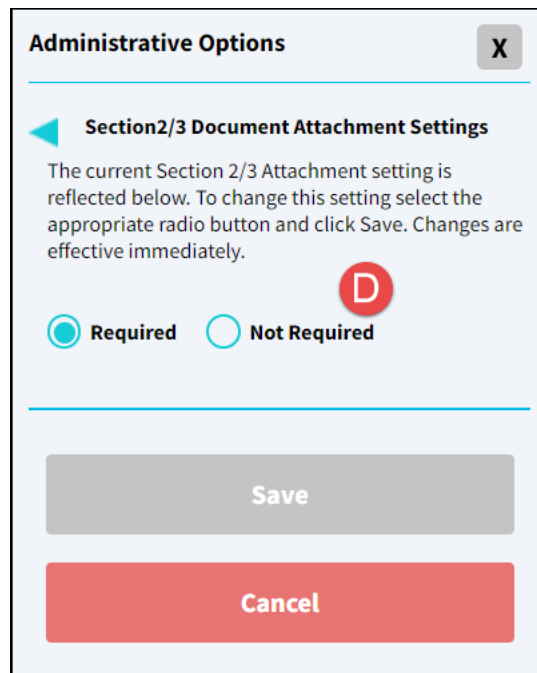


Figure 8: Updating Section 2/3 Document Attachment Settings

D. An I-9 Manager with permissions can change modify the attachment setting as follows:

- a. **Required** – Attachments may be required for users to sign or amend Section 2 or Section 3 of the Form I-9. The Employer **Attachments** setting will factor into this. If required, users must include the requested attachment(s). If they don't, then they will not be able to sign/amend Section 2 or Section 3 of the Form I-9.
- b. **Not Required** – Attachments may not be required for users to sign or amend Section 2 or Section 3 of the Form I-9. The Employer **Attachments** setting will factor into this. If required and users don't include the requested attachment(s), then they will receive an alert prompting them to. However, they will still be able to sign/amend Section 2 or Section 3 of the Form I-9 even without including them.

API support

The Create and Update Employer API calls have been updated to allow customers to control their Employer **Attachments** and **Attachment Required For Signature** settings via API. Please reach out to the Tracker I-9 Product Support team if you'd like a copy of the latest version of the Tracker I-9 Compliance API Integration Guide.