



# Web Portal Guide

<https://portal.employersedge.com>

or go to [www.employersedge.com](http://www.employersedge.com) and select

“access your reports online” in the top right corner.



**employers**edge

unemployment | employment verifications | electronic I-9s



## LOGIN SCREEN

If you've forgotten your password or your temporary password has expired- click here

Enter your email address and password. Upon initial set up, you will receive an email with a link to establish your password.

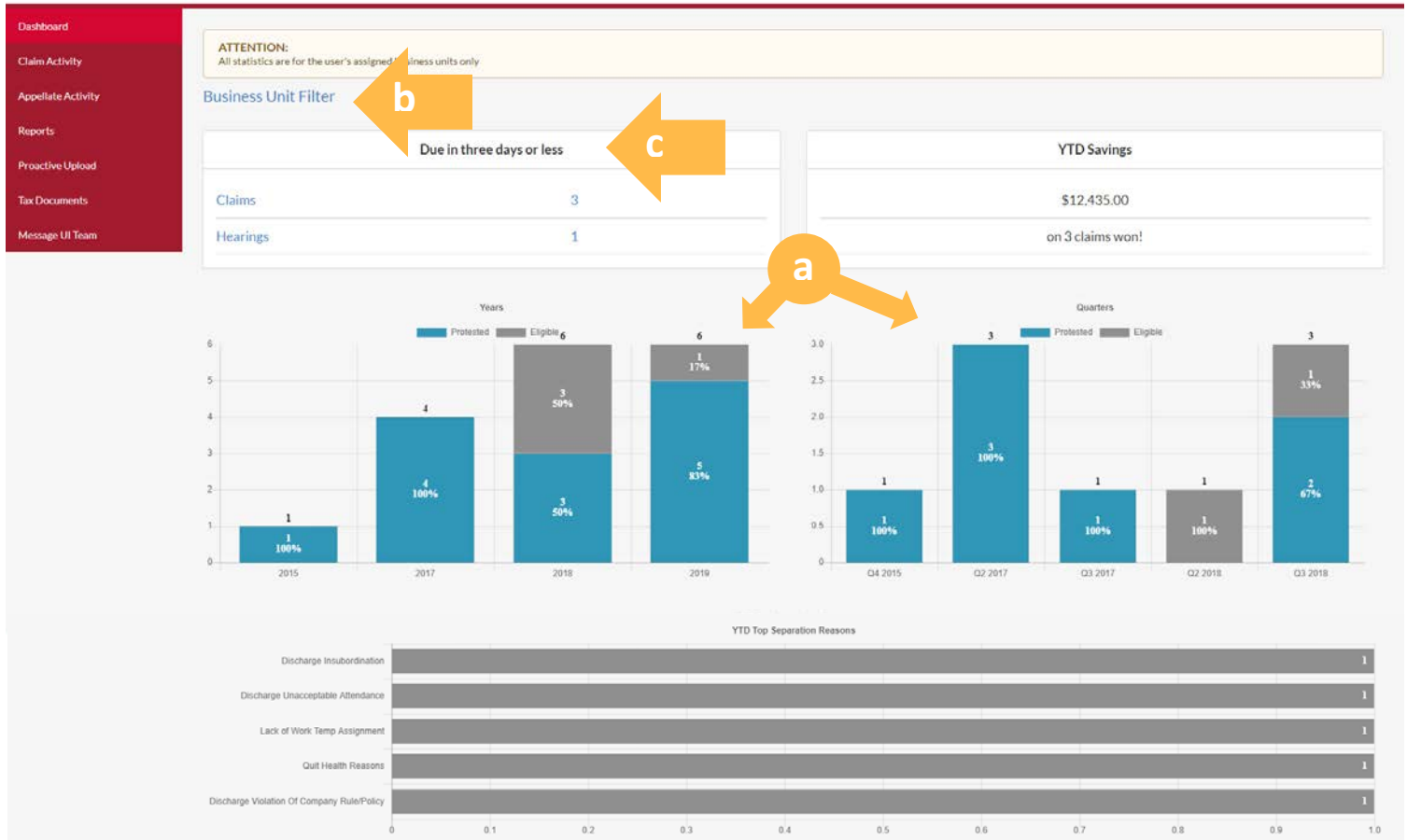
## DASHBOARD

- The dashboard gives you a quick overview of key statistics + insight into items needing your attention. The landing page has been updated:
  - Historical claims information, year over year, and the five most recent quarters.
  - "Business Unit" filter, which allows all data to be filtered by business unit.
  - You can click through the "due in three days or less" items
  - We show the most common separation reasons at the bottom of the dashboard.

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Find SSN, First, or Last

gmceachern@employersedge.com





# CLAIMS ACTIVITY

The Claims Activity tab on the left hand navigation pane is split up into four subcategories.

- i. Customer Attention (claims awaiting information from the customer)
- ii. Edge Attention (claims returned to Edge for review or be submitted)
- iii. Completed Recently (claims completed in the last 30 days)
- iv. Recent Decisions (initial level decisions within the last 30 days)

The following features are useful for navigating claims activity –

- a. Business Unit Filter - can be used to limit view to specific business units
- b. The arrow icons in between each column headers can be used to sort and reverse sort claims by each column. The page opens with claims sorted by due date in chronological order.
- c. Headers can be filtered by click in the header box. The ID # field defaults to an employee ID if provided to us in advance or a masked SSN. This field can also be left blank.
- d. Search bar – enabling fast access to a specific claim
- e. The “Memo” field will start with the name of the person receiving our contact on this event (claim, decision, or adjudicator call). If more than one person is contacted, you will see the first name, the a “+ 2 more” for example. You can overwrite what is in the memo field by typing and clicking the check mark to save it.
- f. The “Export” button allows you to download the claims activity as a .csv file.
- g. You can view the progress of each questionnaire that has been forwarded with the requirement to return for review.



- N - New, no questions have been answered



- F – Out for field completion



- R – Returned for moderator review

The screenshot shows the 'Customer Attention Claims' page. On the left is a navigation menu with 'Claim Activity' selected. The main area has a 'Business Unit Filter' (callout a) and a search bar (callout d). Below is a table of claims with columns: Due Date, Name, ID#, Business Unit, Doc. Type, Memo, and an action column. Callouts b, c, and e point to the sort arrows, filter boxes, and memo input fields respectively. Callout f points to the 'Export' button. Callout g points to the status icons (N, F, R) in the action column.

| Due Date  | Name              | ID#       | Business Unit        | Doc. Type | Memo         | Action |
|-----------|-------------------|-----------|----------------------|-----------|--------------|--------|
| 5/13/2019 | Jones, Mark       | ****-2468 | CT1 Wethersfield     | Decision  | Test2        | ✓ N    |
| 5/15/2019 | Doe, Jane         | ****-1234 | CT1 Wethersfield     | Claim     | Kelsey       | ✓ N    |
| 5/15/2019 | Johnson, John     | ****-6666 | TX2 Dallas           | Claim     | T. Williams  | ✓ N    |
| 5/16/2019 | Randle, Anne      | ****-2234 | FL2 Palm Beach       | Claim     | T. Williams  | ✓ N    |
| 5/16/2019 | Smith, John       | ****-7777 | CA2 San Francisco    | Claim     | 123456       | ✓ N    |
| 5/17/2019 | Matthews, Michael | ****-5555 | CO1 Denver           | Claim     | Brenda Bakel | ✓ N    |
| 5/17/2019 | Anderson, John    | ****-7777 | KS1 Topeka           | Claim     | J Skindzier  | ✓ N    |
| 5/17/2019 | Smith, Bob        | ****-3333 | FL2 Palm Beach       | Claim     | T. Williams  | ✓ N    |
| 5/17/2019 | Practice, John    | ****-6789 | CO2 Colorado Springs | Claim     | T. Williams  | ✓ N    |





## APPELLATE ACTIVITY

The Appellate Activity tab on the left hand navigation pane is split up into four subcategories.

- i. Customer Attention (hearings awaiting information from the customer or set for hearings)
- ii. Agent Attention (hearings in process being worked on by Edge)
- iii. Recent Decisions (hearing decisions in the last 30 days)
- iv. Recent Hearings (hearings scheduled within the last 30 days)

The following features on this page include;

- a. Business Unit Filter - can be used to limit view to specific business units
- b. The arrow icons in between each column headers can be used to sort and reverse sort claims by each column. The page opens with claims sorted by due date in chronological order.
- c. Headers can be filtered by clicking in the header box. The ID # field defaults to an employee ID if provided to us in advance or a masked SSN. This field can also be left blank.
- d. Search bar – enabling fast access to a specific claim
- e. The “Export” button allows you to download the appellate activity as a .csv file.

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User Management  
Dashboard  
Claim Activity  
**Appellate Activity**

- Customer Attention
- Agent Attention
- Recent Decisions
- Recent Hearings

Reports  
Proactive Upload  
Tax Documents  
Message UI Team

Business Unit Filter

Customer Attention App

| Due Date    | Name              | ID#       | Business Unit        | Doc. Type        | Memo       | Hearing Date | Decision Date | Process Status             |
|-------------|-------------------|-----------|----------------------|------------------|------------|--------------|---------------|----------------------------|
| 5/17/2019 ⚠ | Delgado, James    | *****2211 | CO2 Colorado Springs | Hearing Notice   | M. Smith ✓ | 5/18/2019    |               | Set For Hearing            |
| 5/20/2019   | Bronson, Audrey A | *****7777 | CO1 Denver           | Hearing Decision | Memo... ✓  |              |               | Awaiting Customer Response |

Export



## CLAIM DETAILS

After clicking on a claim from the “Claim Activity” or “Appellate Activity” screens, you will see the specific claim details. The Claim tab on the left hand navigation pane will split up into four subcategories.

- i. Details
- ii. Documents
- iii. Claim Notes
- iv. Appellate Notes

**Claim Details:** Here, we display all the critical data items for that particular unemployment claim including items such as the Business Unit, the Separation Reason, the Potential Charge Liability and the Claim Status. You can click on “Show Additional Information” for additional claim details. If the claim has a questionnaire that is available, you will see a “Questionnaire” button at the top of the page.

The screenshot shows the 'Claim Details' page for Michael Matthews, claim number 1588310. The page features a dark red sidebar with navigation options: User Management, Claim 1588310 - Michael Matthews (selected), Details (selected), Documents, Claim Notes, Appellate Notes, Dashboard, Claim Activity, Appellate Activity, Reports, Proactive Upload, Tax Documents, and Message UI Team. The main content area is titled 'Details for Claim 1588310 - Michael Matthews' and includes a 'Questionnaire' button. Below this is a table of claim details:

|                      |                                    |
|----------------------|------------------------------------|
| Name:                | Michael Matthews                   |
| Due Date:            | 5/24/2019                          |
| Potential Liability: | \$0.00                             |
| ID#:                 | ***-5555                           |
| State:               | CO                                 |
| Business Unit:       | CO1 Denver                         |
| SUTA:                | 123456.00-1 ABC Distribution, Inc. |
| Claim Specialist:    | test@employersedge.com             |
| Separation Reason:   |                                    |

At the bottom of the details section is a red button labeled 'Show Additional Information'. The top of the page includes the Employers Edge logo, 'ABC Company (Sample)', a 'Feedback' link, a search bar with the text 'Find SSN, First, or Last', and the email 'sbell@employersedge.com'.



### Documents:

- a. On this tab you have access to all documents associated with this claim. There is a “download” button next to each document which will allow you to download any of the documents associated with the claim.
- b. To upload additional documents related to this claim click the “Upload file” button
- c. New Feature on the Claim Documents tab – “Create Doc Upload Link”. This is a way to have someone outside the portal easily upload a document in a secure manner. This will create a link that you would copy to an email and send to the person who needs to upload a document for this claim. This will be used most often by our hearing representatives when they need to gather additional documents.

Claim 1449520 - Mark Jones

### Documents for Claim 1449520 - Mark Jones

For this claim 3 documents were found

| Type        | Date     | Download |
|-------------|----------|----------|
| Sep Notice  | 8/8/2018 |          |
| Transmittal | 8/8/2018 |          |
| Claim       | 8/8/2018 |          |

Buttons: Create Doc Upload Link, Upload File

**Claim/Appellate Notes :** Use the notes tabs to see the communications associated with the claim. From here, you can quickly see who is working on the claim, and what information is still needed. At the top right of the page is the “Add a Claim (or appellate) Note” button, and at the bottom of the claim notes will be a “Print” button. You will have to select the type of note (either final or interim) before you can add it.

### Notes for Claim 1449520 - Mark Jones

[Add a Claim Note](#)

7/12/2018 5:07:04 PM AUTO WAGE LOOKUP  
 First Name: Mark  
 Last Name: Jones  
 Location: CT1  
 Orig. HD: 05/02/2017  
 Current HD: 05/02/2017  
 Sep Date:  
 Sep Code:  
 Misc: Employment Status: A

Employee ID: xxxxxx  
 Job Title: CSR  
 Payrate: 14.5000  
 Last Paid: 01/05/2018  
 SUTA: 123456

7/12/2018 5:07:05 PM General Note  
 Rec. new BASE claim

7/12/2018 5:07:35 PM First Claim Request  
 DD 07/25

7/15/2018 4:10:53 PM Response From Client  
 From: Unemployment  
 Sent: Monday, July 15, 2018 11:19 AM  
 To: Brenda Bakel



## REPORTS

The “Reports” tab on the left hand navigation pane is split up into two subcategories, “Activity” and “Trend”. The activity report will provide a comprehensive look at claims activity for the selected date range and business unit(s). The trend report will provide a comparative analysis of key unemployment activity metrics over multiple time periods. The report will be delivered via email to your login email address usually in less than 4 minutes.

- a. Excel document or PDF for the exported file
  - i. **Excel Format:** This comprehensive report is actually 4 reports in one, delivering to you a total picture of your unemployment activity via tabs at the bottom of an excel spreadsheet. This report contains the following for the requested date range: claims completed, additional (reopened or refiled) claims completed, decisions received, unemployment hearings that took place and board appeals that were filed.
  - ii. A detailed explanation of all tabs on the excel report can be found on the first tab of the report.
  - iii. **PDF Format:** This report contains the same information, but is formatted in an easy to read PDF format, often times more conducive to customers with smaller claims activity levels.
- b. Click the arrow next to the company name to expand the business unit filter. The arrows next to each state will expand the list of each business unit in that state. Choose any number of business units when running a report.
- c. Choose a start and end date for the report in MM/DD/YYYY format.

The screenshot shows the 'Unemployment Claims Activity' report interface. At the top left is the 'employersedge' logo and 'ABC Company (Sample)'. At the top right is a search bar with 'Find SSN, First, or Last' and a search icon, and a user profile dropdown with 'sbell@employersedge.com'. The left navigation pane includes 'User Management', 'Dashboard', 'Claim Activity', 'Appellate Activity', 'Reports', 'Proactive Upload', 'Tax Documents', and 'Message UI Team'. The 'Reports' section is expanded, showing 'Activity' (selected) and 'Trend'. The main content area is titled 'Unemployment Claims Activity' and contains a description: 'This report provides a comprehensive look at claims activity for the date range and business unit(s) selected. It includes a high level summary of claims activity sortable by business unit, a summary by separation type, and our knowLEDGE quality analysis. The report also provides a detail tab featuring all the key data points gathered for each individual unemployment claim.' Below the description are two radio buttons for 'Format': 'Excel' (selected) and 'PDF'. Below that is a 'Business Unit' section with a dropdown menu showing '9999 - ABC Company (Sample)'. Below the business unit are two date pickers for 'Start' and 'End', both showing 'MM/DD/YYYY'. At the bottom is a green 'Request Report' button. Three orange callout arrows labeled 'a', 'b', and 'c' point to the description, the business unit dropdown, and the 'Request Report' button respectively.





## USER MANAGEMENT

This tab will only appear if you have been granted administrator level permissions upon your initial set up. Administrators have the ability to establish additional company users, change permissions as well as delete users.

- The arrow next to the “User” field will sort the users by first name
- You can search for users using CTRL+F on PC or Command+F on Mac

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User Management

Dashboard

Claim Activity

Appellate Activity

Reports

Proactive Upload

Tax Documents

Message UI Team

Export Add User

| User  | Access | Last Login                                    | Total Logins | Edit | Delete |
|---|--------|---|--------------|------|--------|
| <script>alert(xss)</script> ,<br>dassteam1@gmail.com      | User   | Never   | 0            |      |        |
| RD<br>Reports Demo<br>reports@employersedge.com           | Admin  | 2019-05-16T18:25:32.874Z<br>IP: 66.35.55.59   | 25           |      |        |
| CG<br>Charles Gehauf<br>c.gehauf@employersedge.com        | Admin  | 2019-05-16T16:28:45.895Z<br>IP: 66.35.55.59   | 16           |      |        |
| GM<br>Geordie McEachern<br>gmceachern@employersedge.com   | User   | 2019-03-14T20:05:56.782Z<br>IP: 66.35.55.59   | 2            |      |        |
| PS<br>Priyanka Singh Test<br>priyanka.x.s+tester1@pwc.com | User   | 2019-05-16T19:16:14.127Z<br>IP: 38.100.163.49 | 14           |      |        |
| CS<br>Carl Stephen<br>carlson.stephen+tester1@pwc.com     | User   | 2019-05-16T15:34:54.968Z<br>IP: 38.100.163.72 | 6            |      |        |
| PT<br>Pen Tester<br>priyanka.x.s@pwc.com                  | Admin  | 2019-05-16T17:04:50.161Z<br>IP: 38.100.163.49 | 36           |      |        |
| AH<br>alan hall<br>ahall@employersedge.com                | User   | 2019-05-08T19:27:49.735Z<br>IP: 66.35.55.59   | 1            |      |        |
| SB<br>sbell@employersedge.com                             | Admin  | 2019-05-16T18:28:42.459Z<br>IP: 66.35.55.59   | 41           |      |        |
| TE<br>testclient@employersedge.com                        | User   | 2019-05-16T16:20:53.598Z<br>IP: 66.35.55.59   | 667          |      |        |

**Users can be established with varying levels of access according to your business unit structure.**

Say, for example, that your company has Territories. Within those Territories, you have Regions, and, within those Regions, you have Locations.

A user could be set up to only see Region 2 within Territory 1. When that is the case, all aspects of the web portal (including the dashboard, reports, etc.) are also limited to just Region 2 for that user. The user would be able to see all Locations assigned to Region 2.





## PROACTIVE UPLOAD

The proactive upload tab in the left hand navigation pane will allow you to upload separation notices (before a claim has been filed) and documents you have received directly from the State (such as a claim or decision). Using the **Proactive** upload type is for our clients that proactively submit separation notices to us. It will be filed away and not forwarded to your Claim Specialist; it will only be used if a claim is filed at a later date.

However, if you choose **State Document** upload, this is considered a live action item and will be immediately sent to your claim specialist to handle.

If you are uploading documents for a specific unemployment claim, you will do so by navigating to the “Documents” subcategory within the specific claim questionnaire.

- a. You are able to drag and drop a file from your computer, or click “choose a file to upload” to choose a document

The screenshot shows the 'File Upload' interface. At the top left is the 'employersedge' logo and 'ABC Company (Sample)'. On the right, there are links for 'Feedback', a search bar 'Find SSN, First, or Last', and the email 'sbell@employersedge.com'. A left-hand navigation menu lists: User Management, Dashboard, Claim Activity, Appellate Activity, Reports, Proactive Upload (highlighted), Tax Documents, and Message UI Team. The main form area is titled 'File Upload' and contains an 'ATTENTION' box with instructions. Below this is the 'Upload Type' section with radio buttons for 'Proactive' and 'State Document'. The 'SSN' field is a text input with a placeholder 'XXX-XX-XXXX'. The 'First Name' and 'Last Name' fields are text inputs with placeholders 'First Name' and 'Last Name'. The 'State Code' field is a dropdown menu with 'Select State'. A large dashed box represents the file upload area, containing a '(clear)' link, a download icon, and the text 'Choose a file to upload or drag it here'. A 'Submit' button is at the bottom left. An orange arrow labeled 'a' points to the file upload area.



## TAX DOCUMENTS

If you have the necessary permissions, there will be a “Tax Documents” tab. These are all tax documents for that account number, which is not business unit specific. There are options to sort/filter by State, SUTA and Document Type.

The screenshot shows the 'Tax Documents' section of the Employers Edge application. At the top left, the logo 'employersedge' is followed by 'ABC Company (Sample)' with a dropdown arrow. To the right is a search bar with the placeholder text 'Find SSN, First, or Last' and a magnifying glass icon, and a user email 'sbell@employersedge.com' with a dropdown arrow. On the left side, there is a dark red navigation sidebar with the following menu items: 'User Management', 'Dashboard', 'Claim Activity', 'Appellate Activity', 'Reports', 'Proactive Upload', 'Tax Documents' (highlighted in a lighter red), and 'Message UI Team'. The main content area is titled 'Tax Documents' and features a 'Tax Year:' dropdown menu set to '2019'. Below this are three filter dropdown menus: 'State', 'SUTA', and 'Doc Type', each with a double-headed arrow icon. To the right of these filters are three columns labeled 'Tax Year', 'Indexed', and 'Download'.

## MESSAGE UI TEAM

On the last tab you will be able to easily communicate to your claim or appellate contacts by sending them a message. You can securely upload documents such as layoff lists to include in the message.



- User Management
- Dashboard
- Claim Activity
- Appellate Activity
- Reports
- Proactive Upload
- Tax Documents
- Message UI Team**

Send message to:

- Claim Contact
- Appellate Contact

Message

Choose files to upload or drag them here

Send Message