Web Portal Guide

https://portal.employersedge.com

or go to www.employersedge.com and select

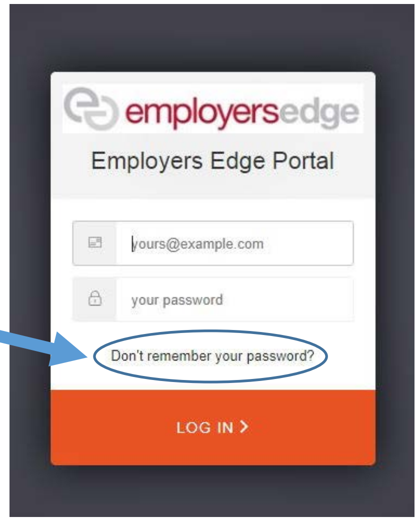
“access your reports online” in the top right corner.

employersedge

unemployment | employment verifications | electronic I-9s

LOGIN SCREEN

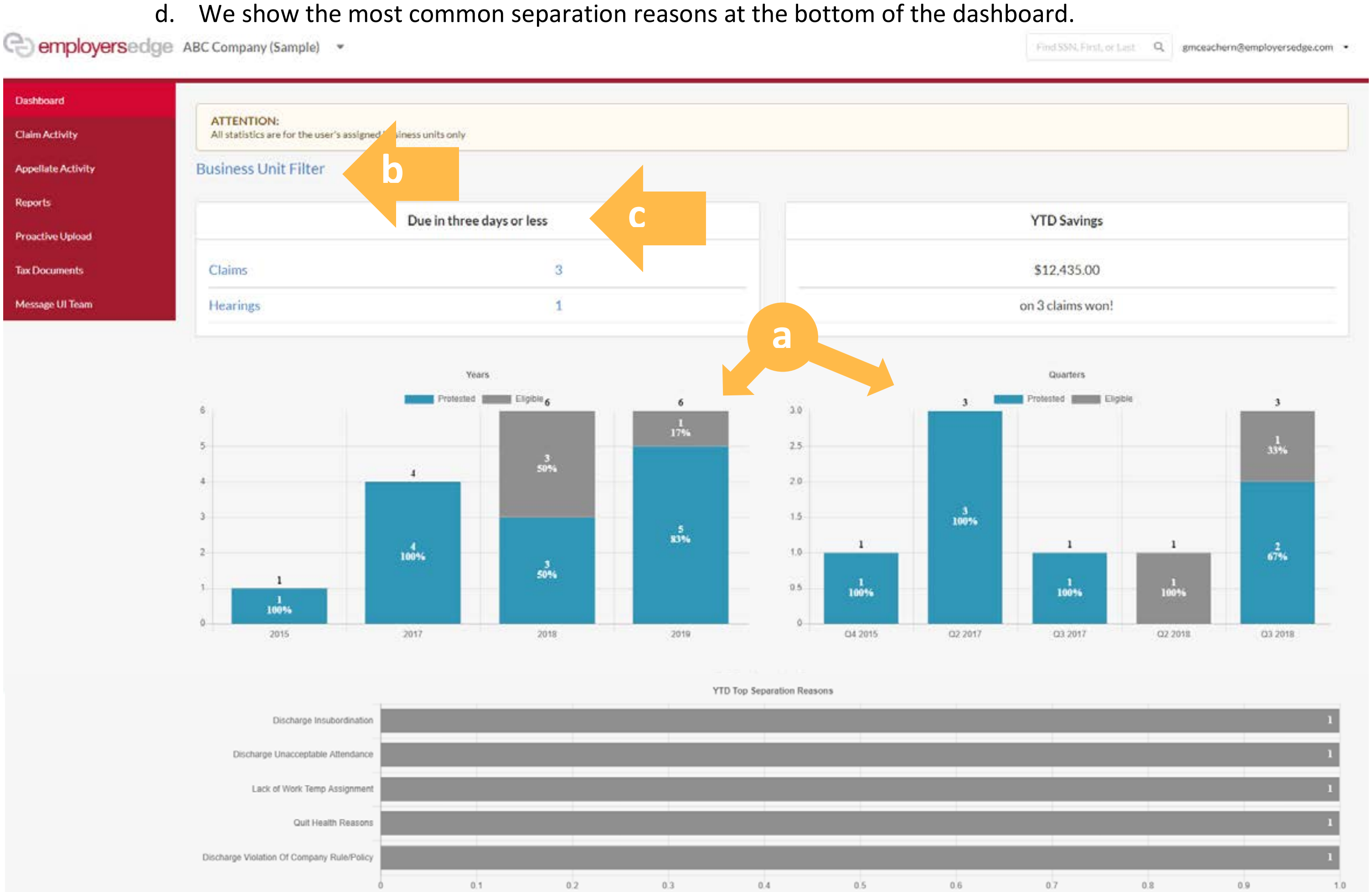
If you've forgotten your password or your temporary password has expired- click here



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

DASHBOARD

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



CLAIMS ACTIVITY

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

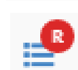
i. Customer Attention (claims awaiting information from the customer)
ii. Edge Attention (claims returned to Edge for review or be submitted)
iii. Completed Recently (claims completed in the last 30 days)
iv. Recent Decisions (initial level decisions within the last 30 days)

The following features are useful for navigating claims activity –

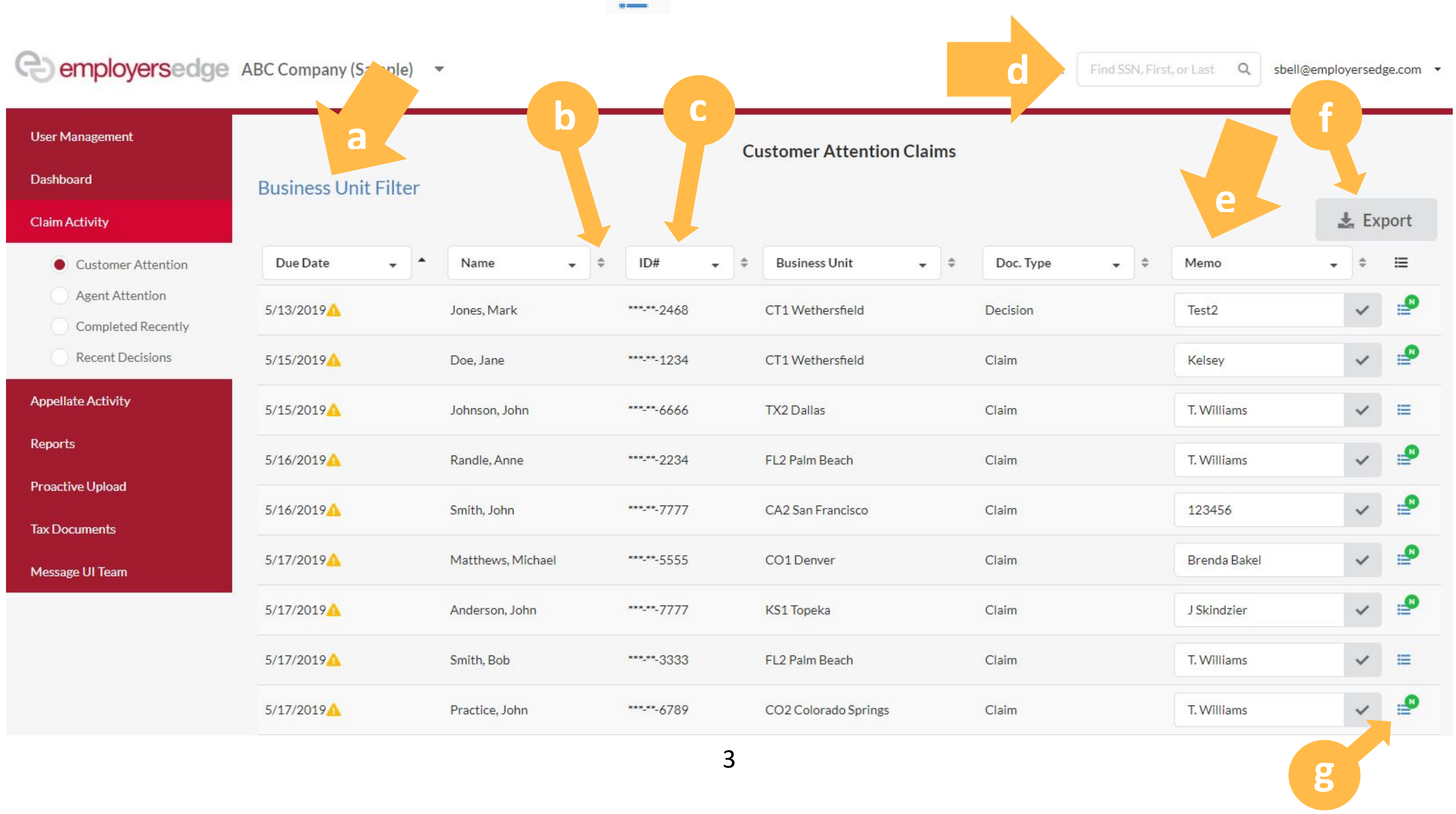
a. Business Unit Filter - can be used to limit view to specific business units
b. The arrow icons in between each column headers can be used to sort and reverse sort claims by each column. The page opens with claims sorted by due date in chronological order.
c. Headers can be filtered by click in the 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



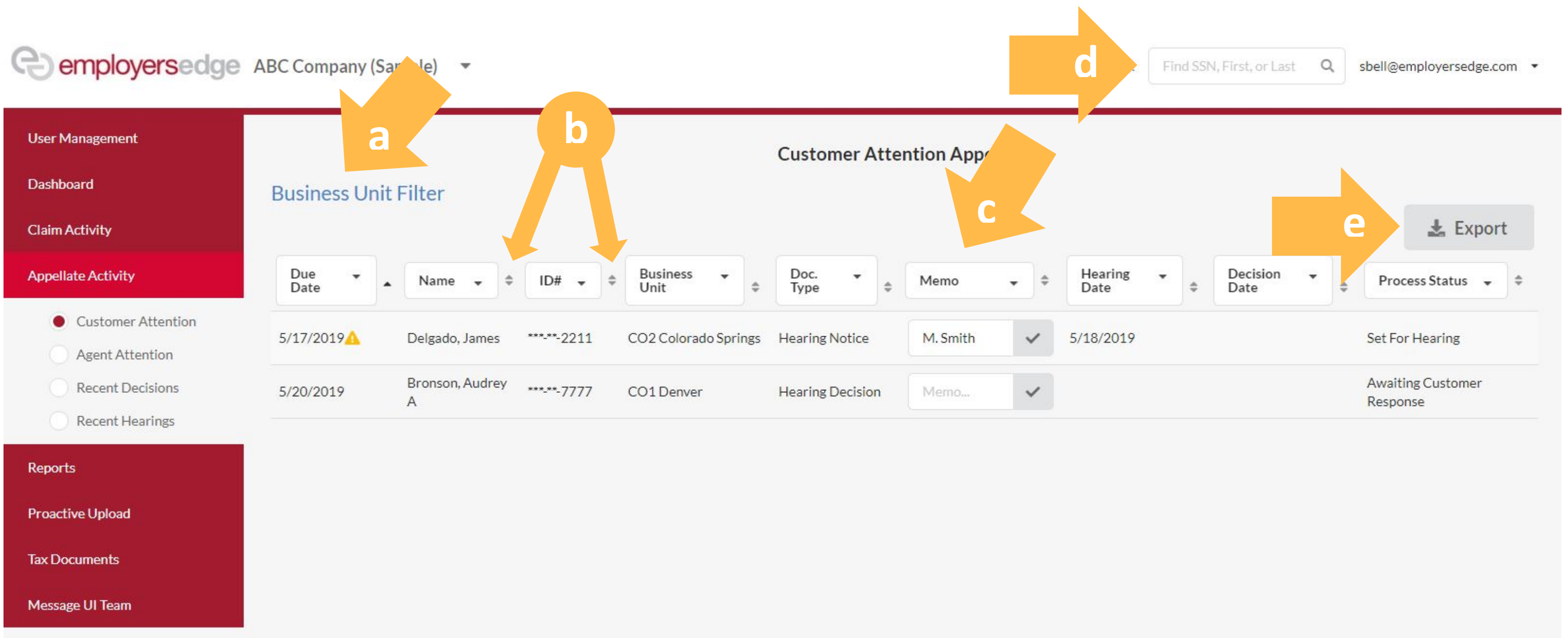
APPELLATE ACTIVITY

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.

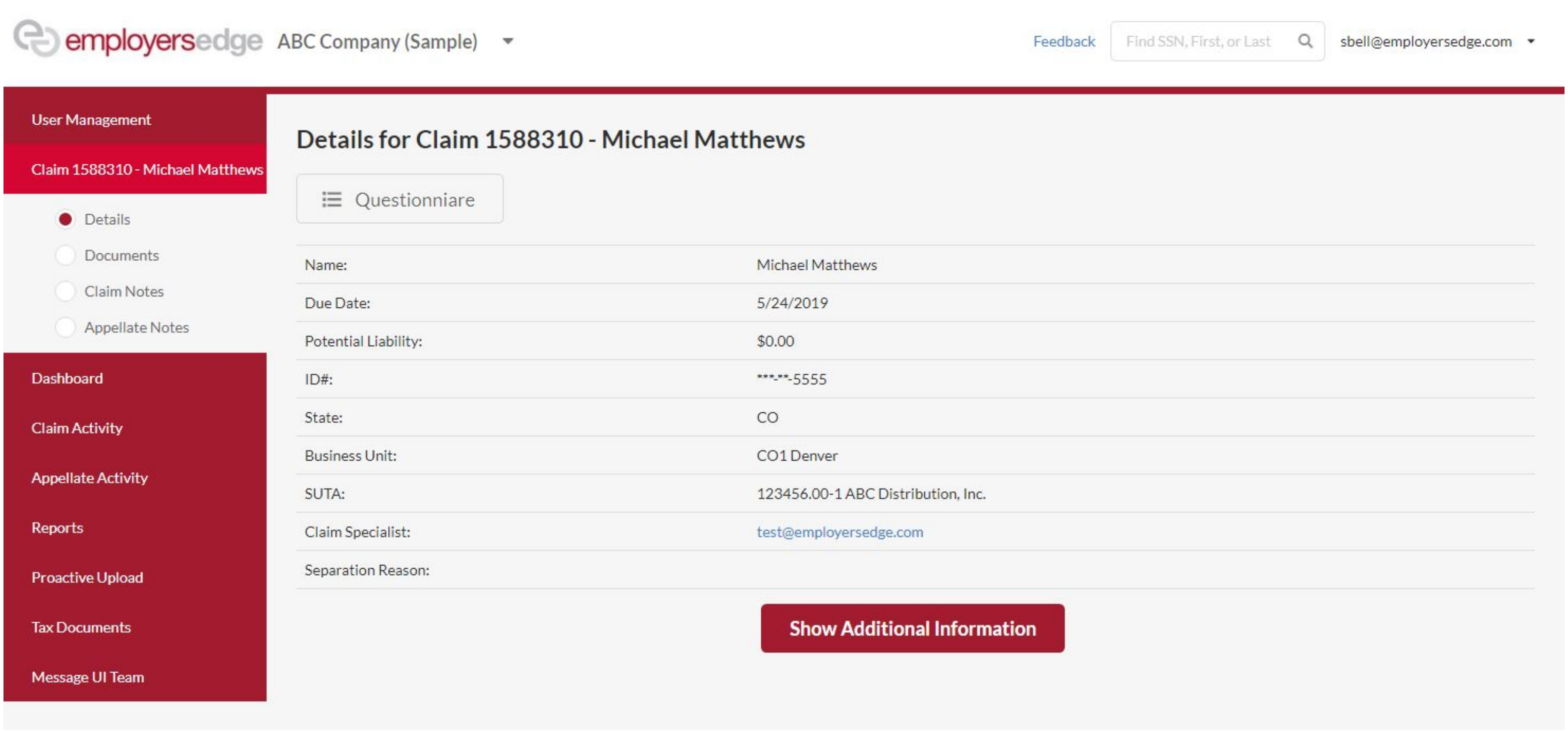


CLAIM DETAILS

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.

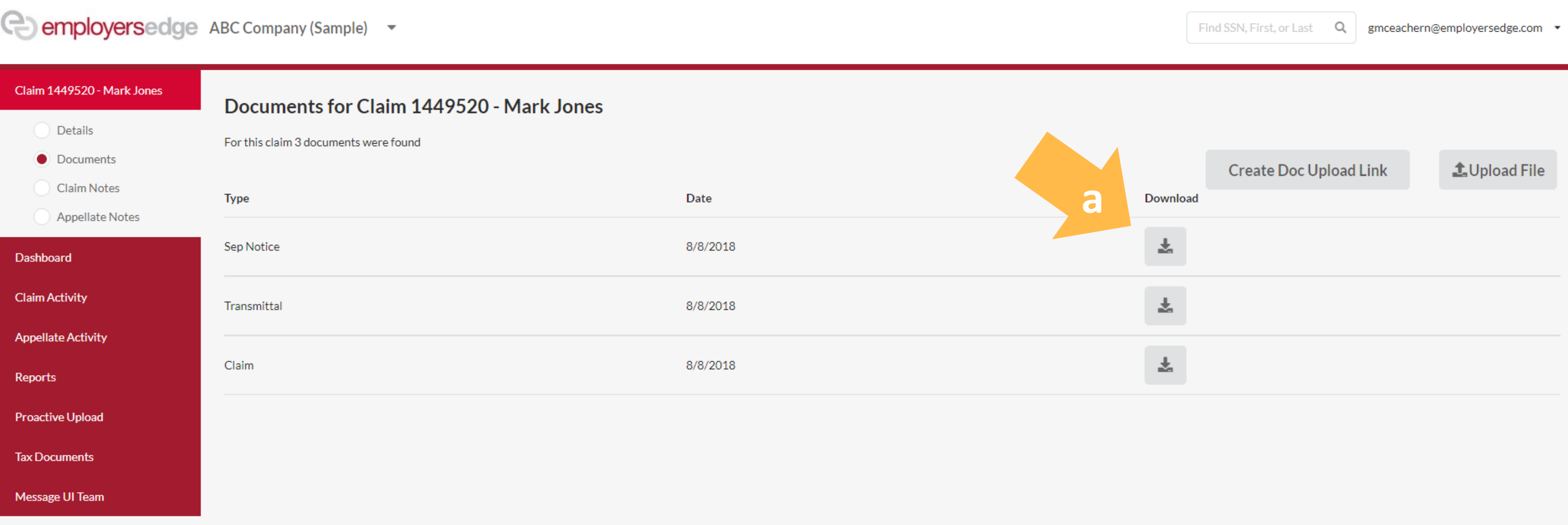
i. Details
ii. Documents
iii. Claim Notes
iv. Appellate Notes

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.



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 you 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.



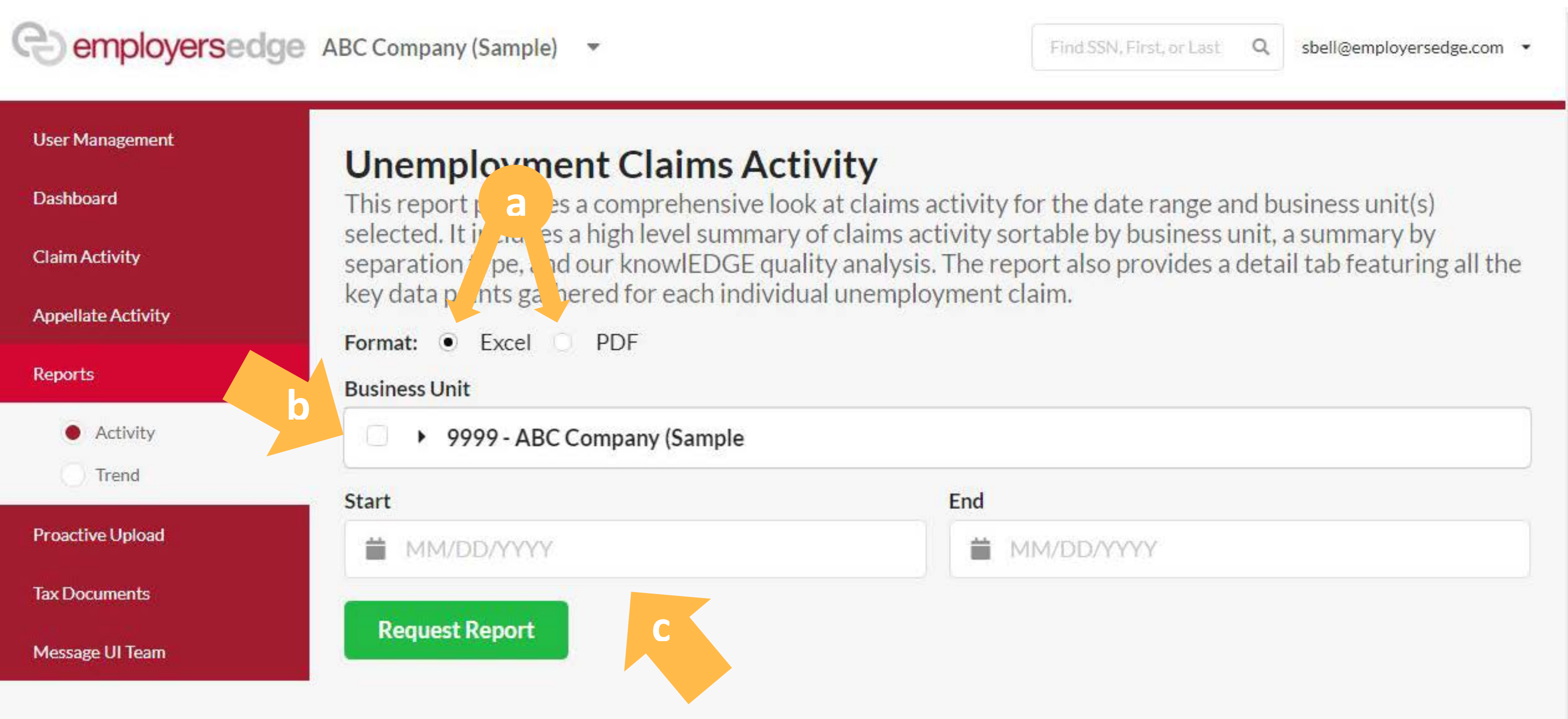
Claim/Appellate Notes : Use the notes tabs to see the communications associated with the claim. From here, you can quickly see who is working on the claim, and what information is still needed. At the top right of the page is the "Add a Claim (or appellate) Note" button, and at the bottom of the claim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

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. <u>Excel Format</u>: 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. <u>PDF Format</u>: 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.

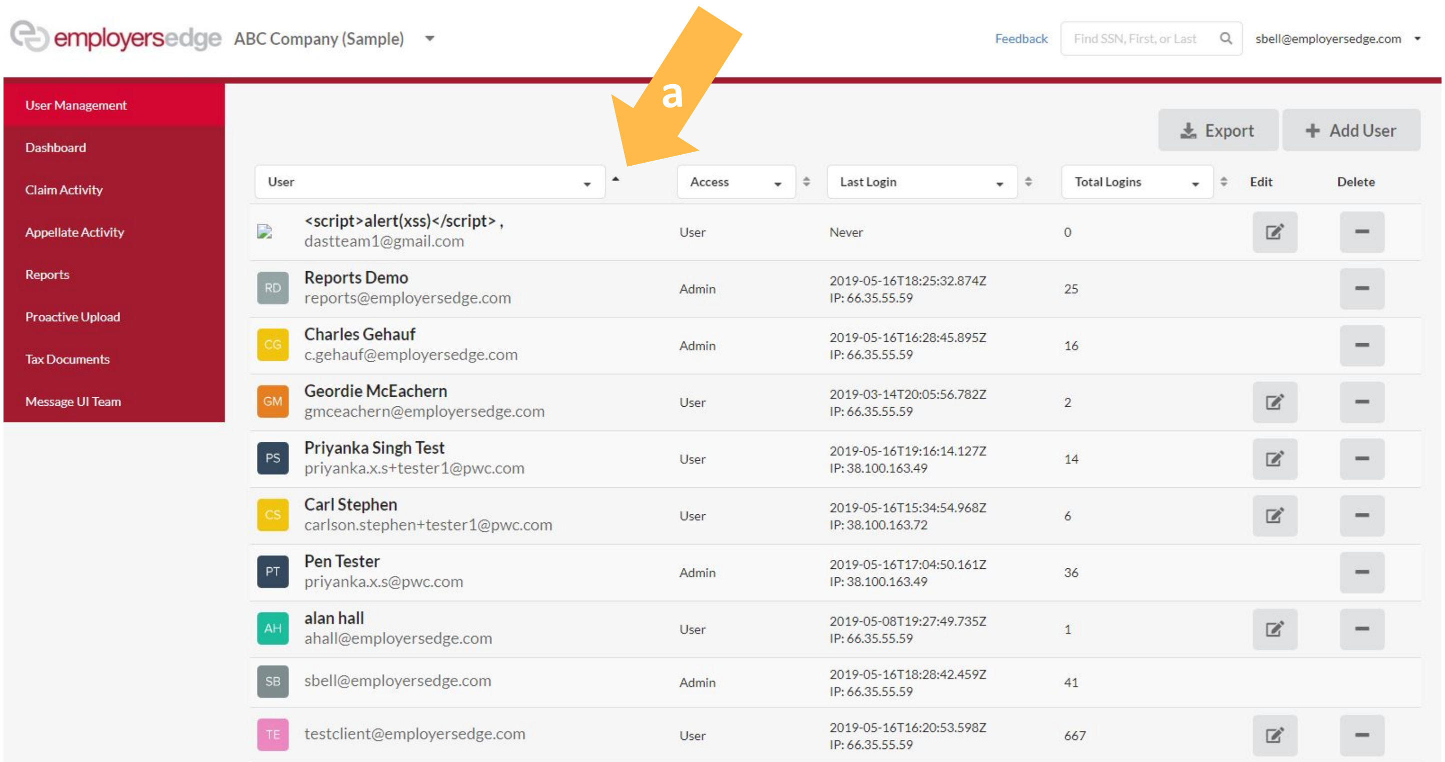
b. Click the arrow next to the company name to expand the business unit filter. The arrows next to each state will expand the list of each business unit in that state. Choose any number of business units when running a report.
c. Choose a start and end date for the report in MM/DD/YYYY format.



USER MANAGEMENT

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

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



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.

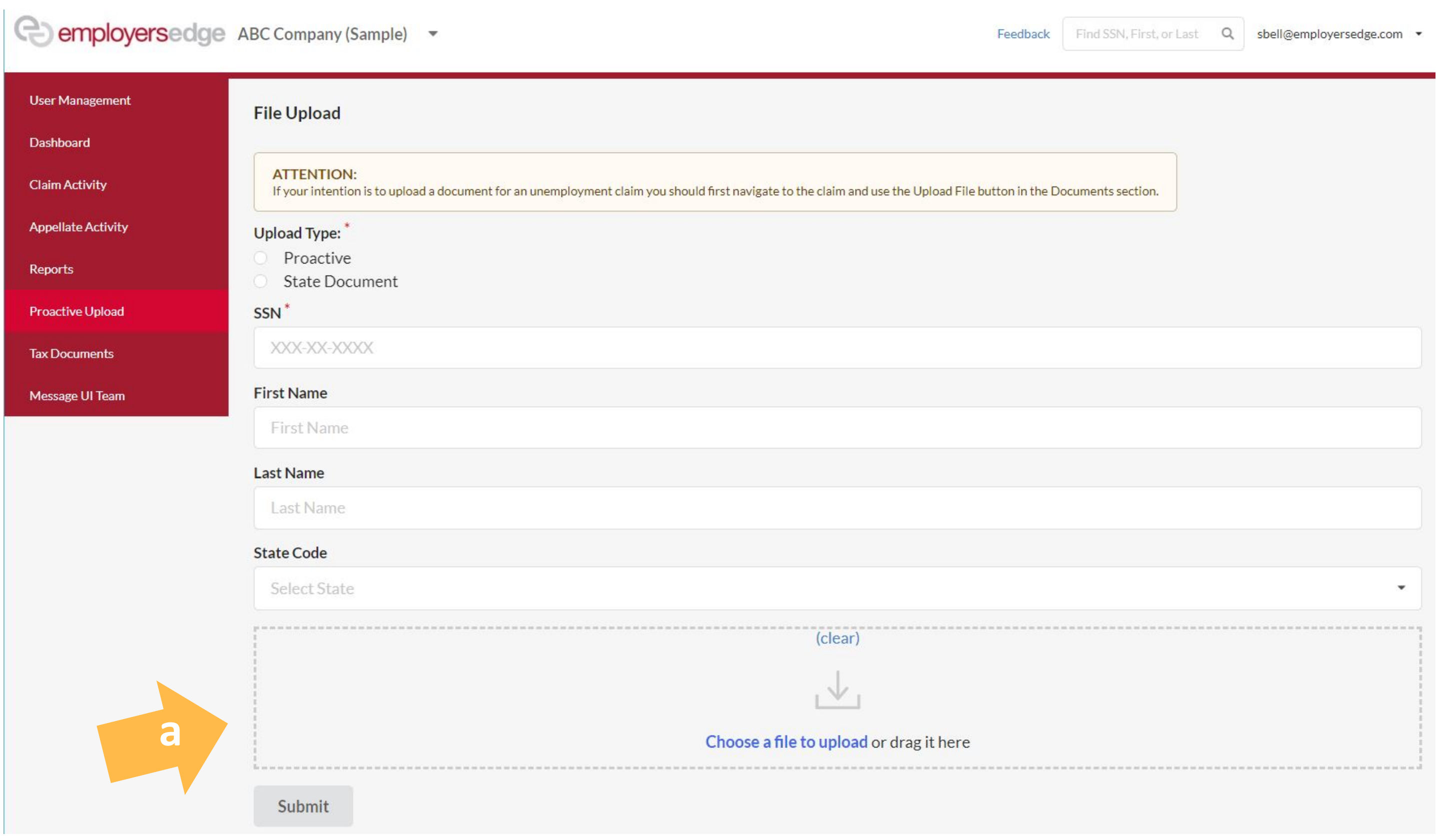
PROACTIVE UPLOAD

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.

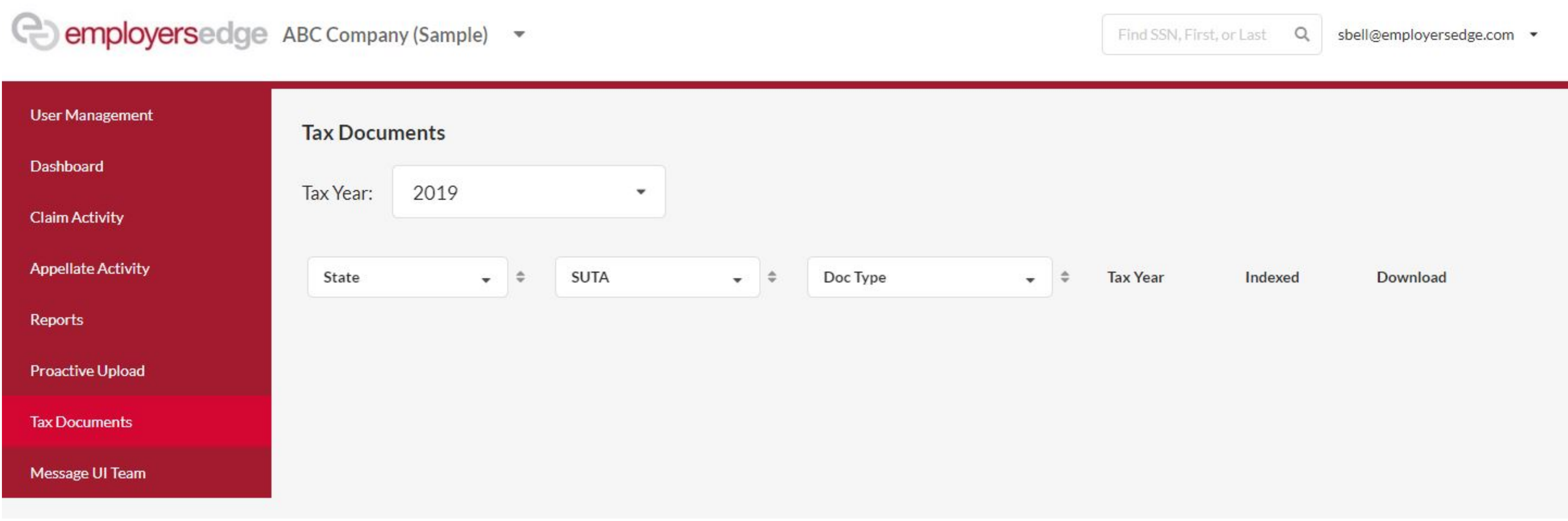
If you are uploading documents for a specific unemployment claim, you will do so by navigating to the "Documents" subcategory within the specific claim questionnaire.

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



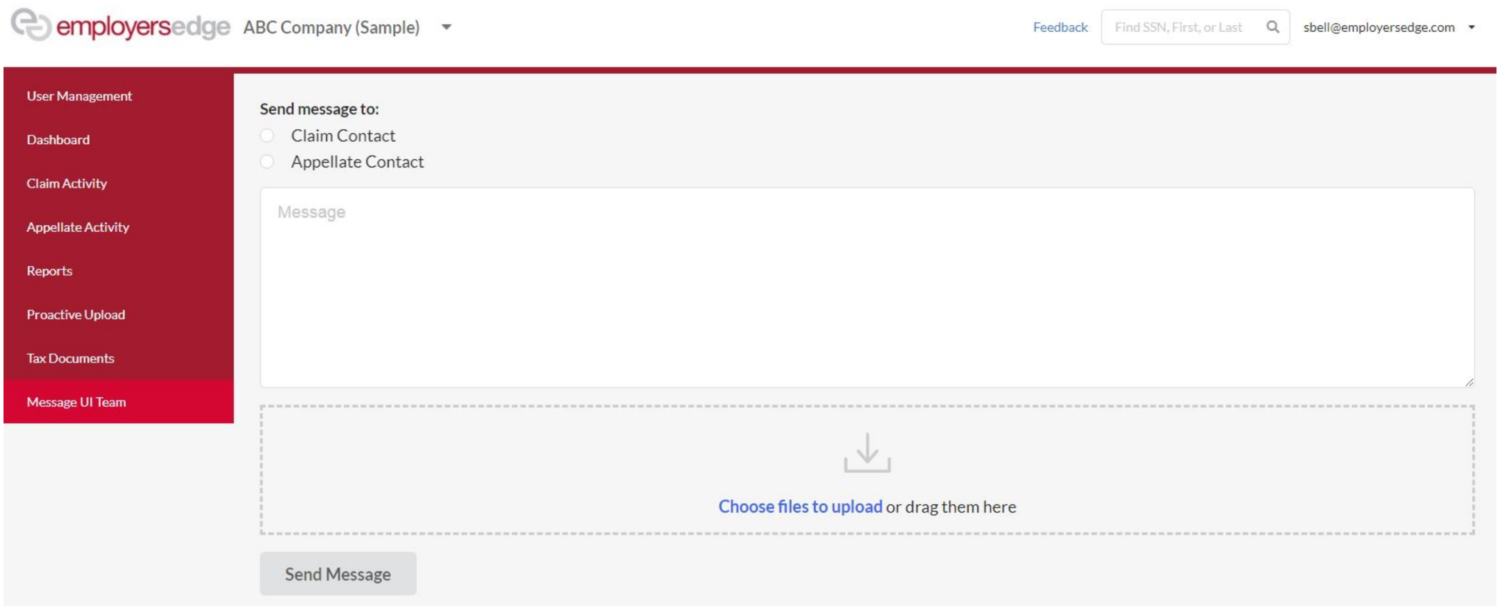
TAX DOCUMENTS

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.



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.


employersedge
ABC Company (Sample)
Feedback
Find SSN, First, or Last
sbell@employersedge.com
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