Unemployment Questionnaire Guide

This guide will describe the key features of the Unemployment Questionnaire used to gather separation information on an unemployment claim. The following are a few key items to keep in mind as you utilize the questionnaire to provide separation information and/or supporting documentation:

- First and foremost, this questionnaire is dynamic in nature, meaning the answer to certain questions will determine what, if any, additional questions are asked. For example, the questions related to a voluntary quit for job dissatisfaction are dramatically different than the questions for a discharge for insubordination. The dynamic element of the questionnaire also applies to the jurisdiction in which the unemployment claim is filed, as questions can differ because the states have different unemployment laws and procedures.
- This questionnaire is secure and can be accessed in two ways. First, it can be accessed from a link that we provide to you in an email communication alerting you of the unemployment claim. Second, it can be opened from the web portal in the Claim Activity section under "Customer Attention".
- Key Point: While we do not require an answer to all questions, these questions are specifically designed to provide the state(s) with the particular information that they need to properly adjudicate the unemployment claim for the specific separation reason identified based upon the filing state's distinctive unemployment laws and procedures. Put another way, the more thorough the answers to these questions, the better chance we have at winning claims for you!

Claim Information: This section lists eight data points on the claim for informational purposes. These items cannot be changed, so if there is an error (which should be rare), please click on the name of your claims specialist, which will open an email for you to alert them.

Claim Information

Due Date:	5/13/2019	Business Unit:	CO1
Potential Liability:		Business Unit Description:	Denver
Claimant Name:	Michael Matthews	SUI Tax Account:	ABC Distribution, Inc. (123456.00-1)
State:	Colorado		
BYB:	7/22/2018	Claims Specialist:	Nicole Toureau

Claim Profile: This section contains five data points required by the states when responding to an unemployment claim. If these have been proactively provided to us, they will already be filled in, but are still editable if needed. Note: In this section, we specifically call out and ask you to confirm the Last Day Physically Worked as the states want to know this specific date that may be different from your termination date. You may also see the pay rate displaying as "On File" which means we have already been provided the rate of pay information and are intentionally not displaying that information in the event it should not be shared with our primary claims contact.

Claim Profile
Review, edit, or complete as appropriate

Job Title	Pay Rate
Clerk	On File

Hire Date	Termination Date
📅 1/1/2018	📅 9/2/2018

Confirm the Last Day Worked with the appropriate radio button

Last Physical Day Worked

📅 9/1/2018   ○ LDW Confirmed   ○ LDW Unknown

Claimant Statement: Some states provide us with a claimant statement, but most do not. Therefore, this is an optional section that will only appear IF we have received a claimant statement relating to their reason for separation from the particular state(s) that provide it to us. When we do receive a claimant statement, you will have an option to provide a response or rebuttal to that statement.

Claimant Statement
The statement provided by the claimant regarding the separation

Fired/Discharged: Discharged

If you would like to include a rebuttal to the claimant statement do so below:

Questions: This is the section where we gather the detailed separation information. First, there may be a few questions before the reason for separation question if that particular state has specific questions that need to be addressed, or, if addressed favorably, might reduce or eliminate benefits.

If we have received the reason for separation proactively, we will complete this question in advance. Please know that this can be changed if the information we received is not accurate. It is in this area that the questions that we ask will dynamically adjust depending upon your answers to previous questions. Other items to note:

- You will notice as you move through the questionnaire that unanswered questions have a slight yellow shading to them while answered questions have a slight green shading to them.
- Answers may be changed or added to up to the point the questionnaire is returned to Employers Edge for review.
- The name of the person most recently answering a particular question is displayed.
- There is not a save button associated with the questionnaire as all answers are saved upon entry. Remember that answers may always be modified any time prior to submission.
- The example below shows portions of a few sample questions.

Questions

Did the claimant receive separation pay at the time of separation? (Other than final payment for wages earned)

○ Yes
◉ No

Did the claimant earn at least $500.00 or more in gross wages?   *Last Answered By: Steve Testing*

◉ Yes
○ No

Last Answered By: Steve Testing

What was the reason for the claimant's job separation?

Discharge	▾

Last Answered By: Steve Testing

What was the reason for the discharge?

Insubordination	▾

Last Answered By: Steve Testing

Please explain how the claimant was insubordinate and/or refused to follow instructions. Please include what the claimant was asked to do and who made the request of the claimant.

Was the request within the normal parameters of their job description?

○ Yes
○ No

[Documents]{.underline} and [Additional Information]{.underline} Sections

Based on the answers provided in the Questions section, the questionnaire will intelligently track and request the specific supporting documents that we would be wanting to provide to the state and will give you the opportunity to securely upload those documents right to the questionnaire. You can click the "choose files to upload" button to select a file, or drag a file from your computer.

Next, we offer you a free form section where you may provide us with any additional information that you feel was not adequately covered in the Questions section.

Documents

⤓

Choose files to upload or drag them here

ATTENTION:
Frequently, the State Agency requests copies of documentation from the employer to support a claim. If there is documentation you are providing that you would prefer to remain confidential, please let us know which documents should remain private.

Additional Information
Add any additional information you would like to include

Listed below are the file types that are accepted. When an unsupported file is uploaded, an error message will occur. Convert the document to one of the supported file types and re-upload.

Documents

MSGI CLAIM TEMPLATE.oft: .oft files are not supported. Please provide one of the supported file types: .bmp, .csv, .doc, .docx, .gif, .htm, .html, .jpeg, .jpg, .odt, .pdf, .png, .pptx, .rtf, .tif, .tiff, .txt, .xls, .xlsm, .xlsx

⤓

Error Uploading: .oft files are not supported. Please provide one of the supported file types: .bmp, .csv, .doc, .docx, .gif, .htm, .html, .jpeg, .jpg, .odt, .pdf, .png, .pptx, .rtf, .tif, .tiff, .txt, .xls, .xlsm, .xlsx

Choose files to upload or drag them here

Conclusion: There are five possible conclusions to each questionnaire as follows:

Conclusion
Finish by selecting the appropriate status below, and then clicking Submit

○ Finish Questionnaire	Select this option to return the questionniare for review and submission
○ Will Finish Questions Later	Use same link to re-open this questionnaire - We will wait until complete to review
○ Forward, then Return to Me	Forward this questionnaire to an email, and receive a notification when that user submits the questionnaire
○ Forward, then Submit to Specialists	Forward this questionnaire to an email, and submit to Claim Specialists for processing when that user submits the questionnaire
☐ Limit questions	Enabled when forwarding. This option limits which questions the recipient can answer. By default, the recipient will only be able to answer questions not currently answered. To customize further, scroll up and make selections manually.

Submit   Print

1. *Finish Questionnaire* – By selecting this option you are telling us that you have completed this questionnaire and are returning it to Employers Edge for review. Note: If you are selecting this option and have not answered all questions, you will be prompted to acknowledge that you are aware that you are returning the questionnaire with unanswered questions.

2. *Will Finish Questions Later* – By selecting this option, the questionnaire will remain open and the claim will show as awaiting response from the customer. You may return to the questionnaire by utilizing the same link from the original email, or by clicking on the questionnaire icon in the web portal.

3. *Forward, then Return to Me* – This will allow you to forward the questionnaire to another individual to complete all or a portion of the questions in the questionnaire and then receive notification through the web portal when the questions have been completed and ready for your review prior to the final submission. When you select this option in the questionnaire an e-mail message will pop open with the questionnaire link that you can then forward to another for completion. **This option will only be available when accessing the questionnaire FROM THE WEB PORTAL or if you are logged into the web portal at the time you accessed the link.** The beauty of this innovation is that the colleague that you forward the questionnaire to is not required to have user login access to the portal. They may simply click the secure link and complete the questionnaire.

4. *Forward, then Submit to Specialists* – If you DO NOT NEED TO REVIEW the questionnaire you can choose the option to forward and then submit to specialist which will still allow you to use the same forwarding options and limit questions within the questionnaire; however, the completer will be able to do the final submission.

5. *Limit Questions* - You will also have the option when you select to forward the questionnaire to limit the questions you want the person on the receiving end to see. If you wish to lock down some questions (you don't want the information changed) you can select the questions the receiving will be able to see and answer. To do so make a section selection before submitting. Once you choose the option to Limit questions the questionnaire will default any unanswered questions as unlocked and answered questions as locked; however, you have the option to lock any questions you do not want the receiver to answer and can also unlock any questions you want the receiver to be able to change and/or edit. Simply click on the lock to change the status.

Questions

Did the claimant receive separation pay at the time of separation? (Other than final payment for wages earned)

○ Yes
○ No

What was the reason for the claimant's job separation? *If there has been no separation please choose "other" to see options for active employees.

Discharge ▼

Once you select which questions to forward you can click submit and the link will be ready to forward. This will open an e-mail message where you can type in the e-mail address you wish to forward the link to. A forward message will appear automatically; however, you may edit it if you so desire before sending.

Send	From ▾	bbakel@employersedge.com
	To…	
	Cc…	
	Subject	Unemployment Questionnaire for Claimant Name Due: 00/00/00

Hello,

An unemployment claim has been filed by Claimant Name and is being forwarded to you for information. Please provide the information requested in the attached link for this claimant. Please note that the link will take you to a secure web page where you can complete the questionnaire as well as upload documentation as applicable. Please let me know if you have any questions.

Claimant Name: First Name Last Name
Due Date: 00/00/0000

LINK TO THE QUESTIONNAIRE WILL BE HERE
**If this link does not work, please copy and paste it into your web browser to populate the questionnaire.

Sincerely,

Questionnaire Progress: You will be able to see the progress from the web portal on each questionnaire that has been forwarded with the requirement to return for review. This allows you as the "reviewer/moderator" to review the information based on the status of the items in customer attention status:

N- New, no questions have been answered

F- Out for field completion

R- Returned for moderator review

You as the "reviewer/moderator" will have to open the questionnaire once marked as to review the information provided and then when you feel confident that the information is ready to return to Employers Edge for completion mark the option to finish questionnaire which will take it out of customer attention.

Print: The print button at the bottom of the questionnaire allows the individual who completes it to print a final version of the questionnaire for their records prior to submission. Copies of the questionnaire will be available shortly after submission in the web portal documents; however, not all questionnaire completers are accessing the questionnaire from the web portal and do not have to be web portal users to completed the questionnaire so this option allows them to keep record of what they submitted for their personal reference or to keep in an employee file if needed.
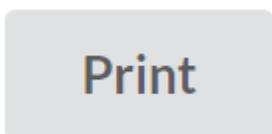
Feedback: Top right of the questionnaire is an option to provide feedback. When clicked, it will pop open a message where a screen print and explanation can be provided. This can be feedback on errors that have been encountered or ideas/suggestions for improvement. Please use this feedback option when you encounter an error as the information is shared with our IT dept. and gives them a lot of useful information to track the error.