**Uzio Integration with Clear I-9**

* **Dec 2, 2024**
* **Knowledge**

Uzio’s integration with Clear I-9 provides an all-in-one solution for managing I-9 verification and E-Verify compliance for both onsite and remote employees. This integration simplifies onboarding, ensures legal compliance, reduces errors, and offers a seamless experience for both employers and employees.

This detailed guide will walk you through the steps to set up, use, and manage the Clear I-9 integration.

* [Overview of Clear I-9 Integration](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_22120258590851733144512021)
* [Prerequisites for Clear I-9 Integration](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_54309498094221733144526620)
* [Setting Up Clear I-9 Integration](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_33206540097791733144537499)
* [Managing Worksite Mapping](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_943398561101201733144547891)
* [Assigning I-9 (E-Verify) Forms to Employees](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_748927449104321733144559089)
* [Employee Workflow: Completing Section 1](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_50093492107861733144569757)
* [Employer Workflow: Completing Section 2](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_926555928111391733144583750)
* [Rehiring Employees: I-9 and E-Verify Guidelines](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_269382174115891733144594052)
* [E-Verify Statuses in Uzio](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_35393396126421733144693985)
* [Download Completed I-9 Form](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_975118910133671733144749214)
* [Rehiring Employees: I-9 and E-Verify Guidelines](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_269382174115891733144594052)
* [Handling Expired Documents](https://help.uzio.com/s/article/Uzio-Integration-with-Clear-I-9#h_68751692010821733147588453)

**Overview of Clear I-9 Integration**

Uzio Integration with Clear I-9 offer following features:

* **Remote and Onsite Verification**: Supports both in-office and remote employees for I-9 compliance.
* **E-Verify Integration**: Automates employment verification by submitting data directly to E-Verify on completion of I-9 form.
* **Worksite Management**: Allows mapping between Uzio work locations and Clear I-9 worksites for better management of  different-2 workcation compliance need.
* **Flexible Document Assignment**: Assign I-9 forms during onboarding or to existing employees.

**Prerequisites for Clear I-9 Integration**

Before setting up the integration, ensure you have the following:

* A registered **Clear I-9 account**.
* Your Clear I-9 account’s **Customer ID** (available from Clear I-9 support).
* **Admin access** to the Uzio platform with permissions to manage integrations.

**Setting Up Clear I-9 Integration**

**Step 1: Navigate to the Integrations Page**

1. Log in to your Uzio account.
2. Navigate to the **Integrations** page from the left menu.
3. Locate the **Clear I-9** tile under available integrations.

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**Step 2: Connect to Clear I-9**

1. Click the **Connect** button on the Clear I-9 tile.
2. Enter your Clear I-9 account’s **Customer ID** in the pop-up window.
3. Upon successful validation, the connection is established, and you’re ready to use the integration.

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*Note*: Once connected, the Clear I-9 tile displays "Connected" with options to **Manage** or **Disconnect**.

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**Step 3: Disconnect the Integration (If Needed)**

1. To disconnect, click **Disconnect** on the Clear I-9 tile and confirm your action.
2. After disconnection, I-9 (E-Verify) services will no longer be accessible.

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**Managing Worksite Mapping**

Once the integration is successfully connected, configure the mapping between UZIO work locations and Clear I-9 worksites. The primary advantage of this mapping is that when an employee record is sent from UZIO to the Clear I-9 system for I-9 task creation, the corresponding mapped worksite (based on the employee's location) is passed into Clear I-9. This ensures that all applicable configurations and settings for the selected worksite are applied to the employee's task. If mapping is not required, you can simply select "None" from the Clear I-9 Worksite dropdown list.

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**Step 1: Access Worksite Mapping**

1. Click **Manage** button on the Clear I-9 tile.
2. This page displays a list of all UZIO work locations, each with a dropdown menu to map them to Clear I-9 worksites. All worksites created under your Clear I-9 account will appear as options in the dropdown for selection. If no worksites have been created in Clear I-9, only "None" will be available for selection.

**Step 2: Map Worksites**

1. Select the appropriate Clear I-9 worksite for each Uzio work location.
2. Ensure each Uzio location is mapped to a unique Clear I-9 worksite.

**Step 3: Save Mapping**

* Save the changes once mappings are complete.
* Proper mapping ensures permissions and roles are applied correctly to I-9 tasks assigned to employees.

**Assigning I-9 (E-Verify) Forms to Employees**

You can assign an I-9 (E-Verify) form to already onboarded employees through the document library or during self-onboarding setup for prospective employees.

**Assign From the Document Library**

1. Navigate to the **Document Library** from left menu.
2. Under **Tax and Compliance Forms**, locate the **I-9 (E-Verify)** form.
3. Select the I-9 (E-Verify) form, then click on “Assign to Employee(s)” located under the Actions menu next to the document name or use the Assign to Employee(s) button at the bottom of the Document Library.
4. Choose the employee(s) required to complete the I-9 form. Once assigned, the employee(s) will receive a document assignment notification, and the document will appear as pending under their “Your Action Needed” section on the employee portal.

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**Assign During Onboarding**

You can assign an I-9 (E-Verify) form, which supports remote verification along with an E-Verify status check, directly from the documents page available in the Self-Onboarding Setup journey for a prospective employee.

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Once the onboarding setup is completed, and the employee is invited for self-onboarding, they will receive a self-onboarding invitation email. This email includes a link that allows the employee to register on the Uzio platform and complete their self-onboarding journey.

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**Notes:**The Uzio platform provides flexibility to assign documents multiple times from the document library. However, for the I-9 (E-Verify) form, if the document is already assigned to an employee and its status is incomplete (e.g., pending with the employee or employer), a new I-9 (E-Verify) form will not be assigned to the employee. While the employee’s record may still appear for assignment, the new form will only become assignable once the existing I-9 task is completed. This ensures compliance and prevents duplication of tasks.

**Employee Workflow: Completing Section 1**

Once the prospective employee register on the platform, they are directed to a welcome page, where they can seamlessly begin their self-onboarding journeyA screenshot of a computer

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In the onboarding documents section, they select the I-9 (E-Verify) form.

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Employees must complete all assigned documents requiring their acknowledgment and signature before proceeding to the next step in the onboarding process. Employees complete Section 1 of the I-9 form directly within Uzio. Upon clicking the **Edit & Sign** action for the I-9 (E-Verify) form, the system launches the Clear I-9 Section 1 workflow through Single Sign-On (SSO) within the same window, ensuring a smooth and integrated experience for completing Section 1.

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Once Section 1 is completed or the I-9 Section 1 workflow is cancelled in between, then employees are seamlessly redirected back to the Uzio platform, returning to the point where they initially started.

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**Employer Workflow: Completing Section 2**

Once Section 1 is completed, the employer receives a notification. The employer can view the latest status of the I-9 (E-Verify) form by navigating to the **Documents** tab within the prospective employee’s profile.

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If the employer clicks the Edit & Sign option, they are redirected to the Clear I-9 admin platform's login page. If already logged in, they are taken directly to the employee’s Section 2 workflow.

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Within the Clear I-9 platform, the employer can complete Section 2 by verifying employee documents and, if necessary, uploading supporting documentation.

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Once Section 2 is finalized, an E-Verify request is automatically submitted to the E-Verify system based on the worksite configurations in Clear I-9, enabling real-time employment authorization.

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A real-time E-Verify status is displayed next to the assigned I-9 document once both the employer and employee complete the form. If employment is authorized, the status will show "Employment Authorized." For other outcomes, a general E-Verify status will appear in Uzio, with more details available on mouse hover. Employers can also access detailed information directly in Clear I-9 at any time and take necessary action.

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**E-Verify Statuses in Uzio**

Uzio displays different E-Verify statuses for I-9 (E-Verify) form to help employers track the progress of their employees' I-9 verification. Here’s a quick overview of the statuses and their meanings:

**"-”**

* When it shows: No case status has been received from E-Verify yet.
* Description: "The E-Verify status for this document will appear here if automatic e-verification is enabled for your Clear I-9 account."

**Need to Submit**

* When it shows: The I-9 form is pending and requires submission for verification.
* Case Status: NEW, DRAFT

**Tentative Non-Confirmation**

* When it shows: Initial verification indicates a mismatch; employer and employee action is required to resolve.
* Case Status: UNCONFIRMED\_DATA, PHOTO\_MATCH, SCAN\_AND\_UPLOAD, MANUAL\_REVIEW, PENDING\_REFERRAL, REFERRED, QUEUED

**Employment Authorized**

* When it shows: The employee’s information has been verified, and employment eligibility is confirmed.
* Case Status: EMPLOYMENT\_AUTHORIZED or Closed cases with the closure reason "EMPLOYMENT\_AUTHORIZED" or "EA\_AUTO\_CLOSE."

**Final Non-Confirmation**

* When it shows: Verification failed; the employee is not authorized for employment based on E-Verify results.
* Case Status: FINAL\_NONCONFIRMATION

**Close Case and Resubmit**

* When it shows: The case is closed, and resubmission is needed for further verification.
* Case Status: CLOSE\_CASE\_AND\_RESUBMIT

**Case Closed**

* When it shows: The case has been closed without employment authorization. For more information about the reason for closure, please review the details in the Clear I-9 and E-Verify systems.
* Case Status: CLOSED (except for "EMPLOYMENT\_AUTHORIZED" or "EA\_AUTO\_CLOSE").

**Download Completed I-9 Form**

A completed I-9 form can be downloaded by clicking the Download Document action next to the document name. Please note that the I-9 form is not stored on the Uzio platform. Instead, it is available for download on demand directly from the Clear I-9.

Note: If you require supporting documents or an audit-friendly report for I-9 compliance, you can download them directly from the Clear I-9 platform.

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**Rehiring Employees: I-9 and E-Verify Guidelines**

When rehiring employees, employers have two options: treat them as new hires or use the information from the previous Form I-9. The approach depends on the rehire timing, the status of the previous E-Verify case, and document expiration. Below is a simplified guide to help employers navigate this process.

**Option 1: Treat as a New Hire**

* Complete a new **Form I-9** for the rehire.
* Create a new case in **E-Verify**.

This option is always available and ensures compliance but may not be necessary in all scenarios.

**Option 2: Use the Previous Form I-9**

If the rehire occurs within **3 years** of completing the original Form I-9, employers may be able to rely on the existing form and previous E-Verify case.

**When to Use the Existing Form I-9**

* **If a Previous E-Verify Case Exists:**
  + The employee’s previous E-Verify case returned a result of **Employment Authorized**.
  + The employee’s Form I-9 documents are still valid or require minimal updates (e.g., adding a rehire date)
    - Write the employee's rehire date in **Supplement B** (Reverification and Rehire) of the existing Form I-9.
    - If required, update any expired **List A** or **List C** documents that trigger reverification.
* **If No E-Verify Case Was Created Previously:**
  + Complete a new Form I-9 and create a new E-Verify case for the rehire.

**Handling Expired Documents**

* **No Expired Documents:**
  + Write the rehire date in Supplement B of the existing Form I-9.
  + A new E-Verify case is **not required**.
* **Expired List A or List C Documents (Triggering Reverification):**
  + Update the rehire date and document information in Supplement B of the existing Form I-9.
  + A new E-Verify case is **not required**, but reverification must be completed.
* **Expired U.S. Passport, Passport Card, Permanent Resident Card, or List B Document:**
  + Write the rehire date in Supplement B of the existing Form I-9.
  + A new E-Verify case is **not required**, unless a new Form I-9 is completed.

**Notes:**

* For rehires, if you choose **Option 1**, where a new Form I-9 is required, you can assign the I-9 form to the employee during the rehire process or from the document library after the employee has been rehired, Clear I-9 system will automatically initiate E-Verify case once I-9 form is completed as per configurations for your account.
* If you choose **Option 2**, you can complete **Supplement B: Reverification and Rehire** (formerly Section 3) directly within the employee's record on the Clear I-9 platform for tasks that have already been verified.
* For the most up-to-date E-Verify guidelines, we recommend consulting your legal advisor or referring to the latest information available on the [E-Verify](https://www.e-verify.gov/e-verify-quick-reference-guide-for-employers-30-initial-verification-31-form-i-9-and-e-verify/312) platform.