

HRCenter Equifax Integration

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What is the Equifax Integration?

We've partnered with Equifax to help you track which employees are eligible for work opportunity tax credits (WOTC). During your application or onboarding process in HRCenter, employees will be directed to answer questions from Equifax to determine if the employee is eligible for WOTC. An employee's eligibility will then be recorded in Enterprise/Beyond.

Check out our video walkthrough:

[M-Equifax Integration](#) from TempWorks Training on [Vimeo](#).

This article includes:

1. [How to Setup the Integration](#)
2. [Filling out the HRCenter Page](#)

How to Setup Equifax Integration

Ready to get started with Equifax? You'll need the following things:

1. Utilizing HRCenter for your onboarding processes
2. Have an account with Equifax

Note In order to get started with this integration, you will need to reach out to your TempWorks Account Manager to start the setup process.

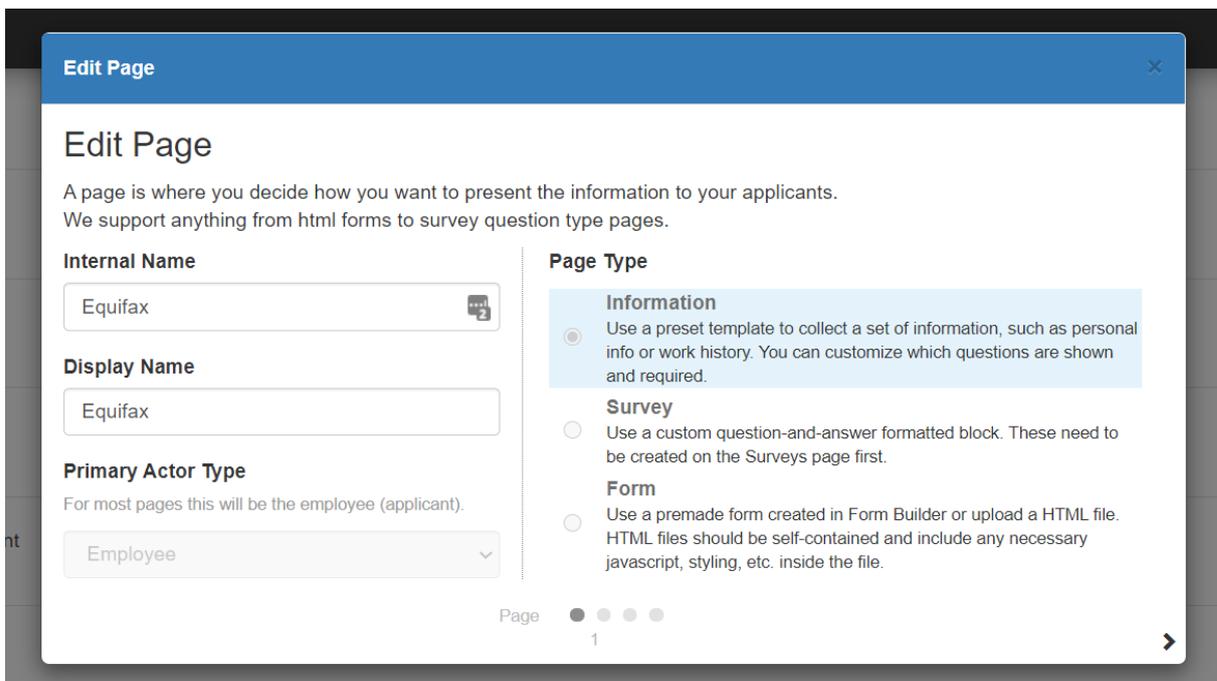
Setting up the HRCenter Page

You will need the following information from Equifax in order to setup the HRCenter Page:

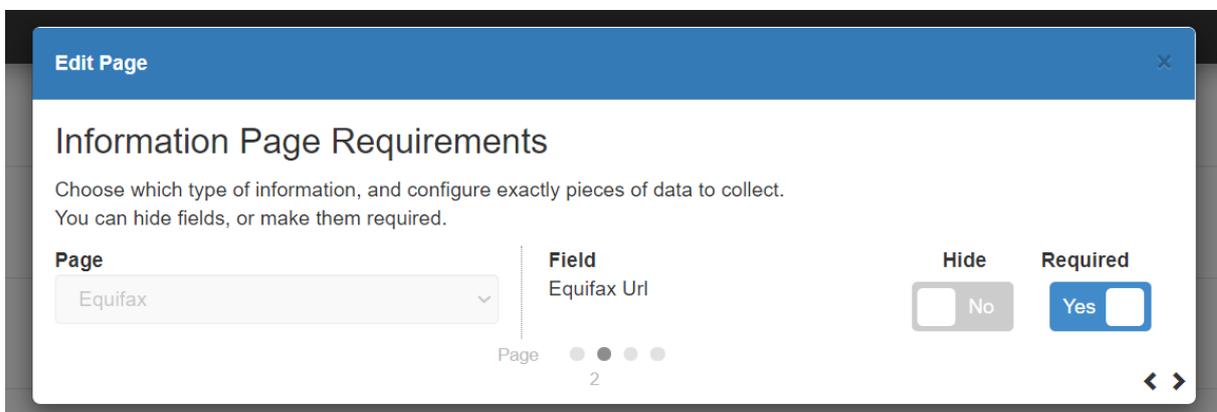
- Your Equifax Customer ID
- Equifax Test Password
- Equifax Production Password

Once you have worked with your TempWorks Account Manager and Implementation Team. You will be walked through the following steps to create the Equifax HRCenter Page. You will need to be an HRCenter Admin to set up the page and add it to a workflow.

1. In HRCenter Admin, Navigate to the Pages section on the left
2. Select the  icon within the Pages category area to add Equifax into HR Center
3. Enter the following information:



- Private name: "Equifax"
 - Display Name: What you want your Applicants to see as the page name
 - Set Primary Actor Type to Employee
4. Choose Information Page type and click the arrow to continue
 5. Select Equifax as the page
 6. Check the Required box under Equifax URL



- ***Note*** The Required box **must** be selected for the URL to be shown within the Page
7. Select the next arrow to reach the configuration details

Edit Page ✕

Configuration Details

Category
The category this block will belong to. Information blocks default to Info Blocks, Survey blocks default to Survey Blocks, Form blocks default to Form Blocks.

 2

Employer Code
Employer Code for Equifax integration.

8. Enter the following information:

- Employer Code provided by Equifax
- Password provided by Equifax
- To test, enter you test password and set the test mode to true - you can edit these settings later when you are ready to start using this

9. Select Next and Save

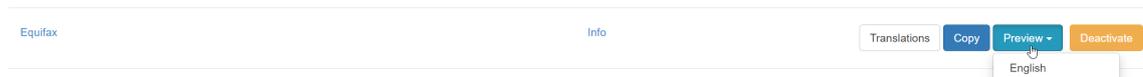
Testing vs. Production

If you want to test this page with a test employee before you add this page to a workflow or send to employees to fill out, use the following information:

1. When you create the page using the instructions above, enter your test password and set Test Mode to True

2. You can test in 2 ways:

1. Preview the page in HRCenter admin by navigating to the page under pages and select preview:



2. Assign the Page to a test employee in your system and log in as that employee (check out [Beyond - How to Assign a New HRCenter Workflow or Page](#) or [The Service Rep's Process](#))

When you are done testing and ready to start assigning this page to users:

1. Navigate back to the page under the pages section in HRCenter Admin
2. Find the page and select it to open the settings dialog
3. Navigate through to the configuration details
4. Change the password to your non-test password provided by Equifax
5. Set the Test Mode to False
6. Select Next and Save

Utilizing the Page

The easiest way to make sure all your new employees are being screened to see if WOTC applies for them, is to add the Equifax page your existing onboarding workflows.

Check out [How to Create & Edit Workflows](#) for step by step details

Filling out the Equifax Page in HRCenter

Once you have added the Equifax integration within a step, applicants will have access to the Equifax survey by selecting the link.

This will re-direct users to the Equifax website:

A screenshot of the HRCenter Equifax page as seen by a user. The top navigation bar is dark grey with the HR CENTER logo on the left, 'Hello, zzTWDemousername' in the center, and 'Log off' on the right. Below the navigation bar, the page title 'Pages Equifax' is displayed. On the left side, there is a sidebar with 'Pages' and two radio buttons: 'Equifax' (selected) and 'Review & Submit'. The main content area shows 'Page 1 of 2' with 'Previous' and 'Save and Continue' buttons. The main content is enclosed in a white box with a light grey border. It has the title 'Equifax' and the text: 'Our company participates in the Work Opportunity Tax Credit (WOTC) program, a voluntary government program designed to stimulate hiring for individuals that meet certain criteria. Part of the application process involves completing the following questionnaire, press continue to begin.' Below the text is a large green 'Continue' button.

Applicants will be prompted to add their social security number within this section:

Tax Credit Questionnaire

Welcome!

Our company participates in the Work Opportunity Tax Credit (WOTC) program, a voluntary government program designed to stimulate hiring for individuals that meet certain criteria. Part of the application process involves completing the following questionnaire. The information you provide is confidential and will be used only for the purpose of obtaining a tax credit. Thank you for your participation in this very important government program.

To begin, enter your Social Security Number.

Employer Code: 72821

* Social Security Number:

[Continue >](#)

Within the personal information section, SSN, name, and address will prefill. Complete the other necessary fields and verify this information is correct. Select 'Continue.' This will bring applicants to the 'Questions' section:

Personal Information

Questionnaire Steps:

- Personal Information
- Questions
- eSignature

Personal Information

The following information is needed before proceeding to the questionnaire. Please check the information shown for accuracy and fill in any boxes that are blank. When complete, please click 'Continue'.

Employer: SEEK Careers/Staffing, Inc.

* Social Security Number:

* First Name:

* Last Name:

* Address:

* City:

* State:

* Zip Code:

* County:

* Are You Under 40 Years of Age?

* Location Code:

If you do not know your location code, please enter "DEFAULT".

[Continue >](#)

Based on the questions answered in Equifax, such as if the applicant has ever had financial aid, been in the military, government funding etc. this will determine if they are eligible for tax credits. If the employee answers 'Yes' to qualifying questions, Equifax may request additional information to fill out:

Survey Questions

Questionnaire Steps:

- Personal Information
- Questions
- eSignature

Questions

Please answer the following questions to the best of your ability. Press 'Continue' when complete.

1. Within the past 2 years, have you or a member of your household received any form of cash or voucher assistance, such as Aid to Families with Dependent Children (AFDC), Temporary Assistance for Needy Families (TANF), Child Care or Transportation Assistance (CCCT), or Food Stamps (FS)? Yes No Not Sure
2. Have you ever served in the US Military? Yes No Not Sure
3. Have you ever been convicted of a felony? Do NOT include misdemeanors. Yes No Not Sure
4. Have you ever participated in a State or Veterans Affairs Vocational Rehabilitation Program or have you participated in the Ticket to Work Program? Yes No Not Sure
5. Have you received Supplemental Security Income (SSI) benefits for yourself within the last 3 months? Do NOT include Social Security Disability Income (SSDI). Yes No Not Sure
6. Have you been unemployed, received Unemployment Benefits or been eligible to receive Unemployment Benefits during the past year? Yes No Not Sure

[< Back](#) [Continue >](#)

As the questions section is completed, applicants will be prompted to verify accurate information has been entered and sign off via eSignature:

eSignature

Questionnaire Steps:

- Personal Information
- Questions
- eSignature
- Tax Credit Questionnaire**
- Release Statement

eSignature - Tax Credit Questionnaire

To electronically sign your Tax Credit Questionnaire, please read the statement below:

Under penalties of perjury, I declare that I gave this information to the employer on or before the day I was offered a job, and it is, to the best of my knowledge, true, correct, and complete.

Please enter the last 4 digits of your Social Security number to indicate your acceptance of the preceding statement.

* Last four of SSN:

By clicking "I Agree" below you will have completed signing the Tax Credit Questionnaire.

[I Agree >](#)

Upon completion with Equifax, applicants are returned back to HRCenter to finish the application/onboarding process.

Once the applicant has completed the necessary information within Equifax, a message will be logged onto their record stating whether they receive credits, and which credits they qualify for:

message

Action:

Equifax Complete. Federal Credits: Appears Eligible State Credits: Not Eligible Other Credits: Not Eligible

Note The employee record will be updated with the appropriate WOTC Eligibility status when EQUIFAX logs a contact message for the employee's eligibility.

Note If the applicant is having issues with Equifax, please have them work with the staffing agency to get this issue resolved. If you are the Staffing Agency, please inquire with Equifax.

Related Articles