

Quick Access

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Overview

To begin employment, we are required to verify each employee's identity and employment authorization to work in the United States through the [Form I-9 process](#). This document is a step-by-step guide to the Remote Form I-9 process in Workday. You will need to complete Section 1 of your Form I-9 in Workday and select a 'Section 2 Reviewer' (friend, family member, colleague, notary) of your choice to inspect your work authorization document(s) in person and complete Section 2 of your Form I-9. Please note that your Form I-9 must be completed within **3 days of your hire date**.

Any Questions? Please reach out to the People Operations team at hr@sofi.org

Procedure for Employee

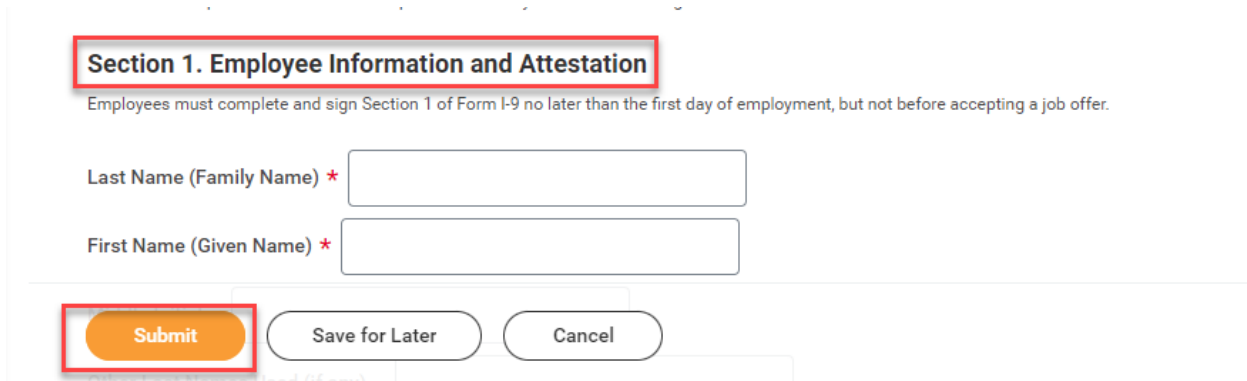
Complete Form I-9 Section 1

1. Please log in to Workday through one of the following ways:
 - a. For new hires that have not started, click this [link](#)
 - b. For new hires that have started, log in through the Okta application
2. Click your Workday inbox in the upper right corner of the Workday homepage
3. Find the **Complete Form I-9** task

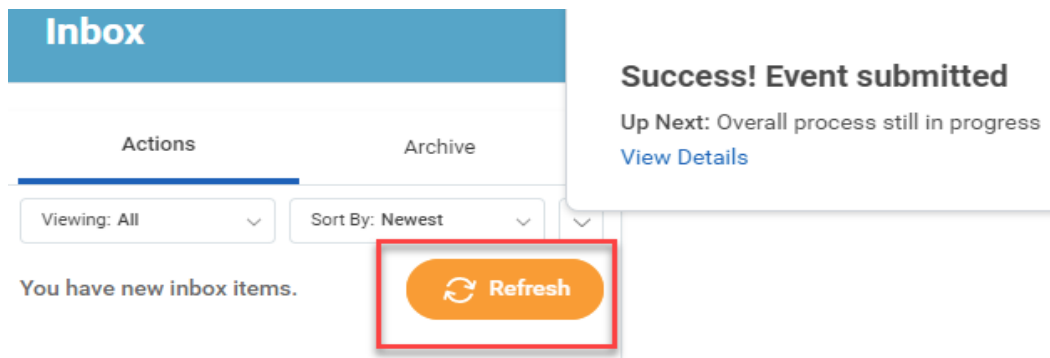


The screenshot shows the Workday user interface. At the top left is the SoFi logo. A search bar is in the center. On the top right, there are notification and task icons, with a red '2' indicating two tasks. Below this is a blue 'Inbox' header. Underneath, there are tabs for 'Actions' and 'Archive'. The main content area displays a task titled 'Complete Form I-9' with a timestamp of '1 minute(s) ago' and 'Effective 04/20/2022'. There are also icons for star, settings, and a window icon.

4. Enter all required employee information, click the attestation, and complete the preparer and/or translator certification



5. Click **Submit** when finished
6. Click the **Refresh** button in your inbox to provide your Section 2 Reviewer's contact information

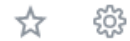


Note: If you missed clicking the 'Refresh' button shown above, you can always exit and re-enter your Workday inbox to find the next task waiting for you

Provide Section 2 Reviewer Contact Information

1. Select the **Relationship** of the Section 2 Reviewer you are choosing to review your work authorization document(s) and complete Section 2 of the Form I-9.

Complete Remote Form I-9



5 second(s) ago - Effective 04/19/2022

Provide Section 2 Reviewer

Choose someone to enter information from your employment eligibility documents into Section 2 of your Form I-9. This person should be:

- At least 18 years old.
- Someone you can meet in person within 3 days of starting your new job, by 03/01/2017.

Relationship *

2. Enter the **Email** address, **First Name**, and **Last Name** of the Section 2 reviewer
3. Click **Submit**

Note: If you are having trouble finding a Section 2 Reviewer, please reach out to hr@sofi.org to assist you.

4. **Next up** the Section 2 Reviewer you've chosen will complete Section 2 of the I-9 (see [Procedure for Section 2 Reviewer](#) process steps below to follow along)
5. Meet your Section 2 reviewer in person **within 3 days of hire** and present a [List A document or a combination of List B and List C documents](#). Your Section 2 reviewer will need information from your document(s) in order to complete Section 2 of your I-9.

Important: The document(s) must be valid and unexpired. Also, The link will expire after 3 days of being generated so you'll need to present your documentation to them in that timeframe. Go to the 'Troubleshoot Link Issues for Section 2 Reviewer' section to learn how to send a new link to them if the link expires.

6. After they submit Section 2, log in to Workday, go to your inbox, and click **Submit** on the final step to complete the Form I-9 process

Complete Remote Form I-9



20 hour(s) ago - Effective 04/20/2022

Your Section 2 reviewer completed Section 2 of the Form I-9! Submit your Form I-9 to complete the process.



Note: A member of the People Operations team at SoFi will review all information. If anything is incorrect or incomplete, they will work with you to resolve the issue and resubmit information if necessary.

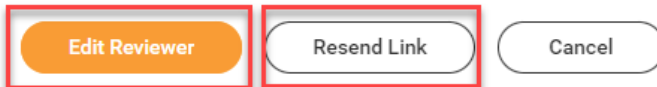
Troubleshoot Link Issues for Section 2 Reviewer

1. Contact your Section 2 reviewer and ensure that they received the email from sofi@myworkday.com. If not, go to your Workday inbox and find the 'Complete Form I-9: [Employee Name]' task and take one of the following actions:
 - a. Click **Resend Link** to send a new link from Workday via email (note: the new link will expire after 3 days)
 - b. Click **Edit Reviewer** to resubmit their contact information if you believe there was an error or enter a new reviewer

Email * test@gmail.com

Section 2 Reviewer's Name

Next Up: Bring your employment eligibility documents when you meet with your Section 2 reviewer.



Procedure for Section 2 Reviewer

Complete Form I-9 Section 2 for Employee

1. Check your email inbox for a message:
 - a. From: sofi@myworkday.com
 - b. Subject line: **Request to Complete Form I-9 for [Employee's Name]**
2. Read the instructions within the email carefully
3. Meet the employee in person within **3 days of their hire date** and click the link within the email once you have examined their work authorization document(s). The employee must present a [List A document or a combination of List B and List C documents](#).

Workday User Guide: Remote Form I-9 Process



Request to Complete Form I-9 for Jennifer Aniston

External Σ Inbox x



sofi1@myworkday.com

9:18 AM (8 hours ago) ☆ ↶ ⋮

to me ▾

Hello

You've been selected to complete Section 2 of the Form I-9 for Jennifer Aniston. You must meet with them in person to complete Section 2 of the Form I-9.

In case you're not familiar with the Form I-9:

The Form I-9 is a government form that's used to verify the identity and employment authorization of individuals hired for employment in the United States.

Jennifer Aniston must show you acceptable documents that establish identity and employment authorization.

Examine these documents and determine whether the documents reasonably appear valid and relate to the employee.

Enter the document information into Section 2 of the Form I-9. You can find the list of acceptable documents [here](#).

Before using the link below to complete Section 2 of the Form I-9, ensure that you are with Jennifer Aniston in person and have access to their documentation.

<https://wd2-impl.myworkdaysite.com/RemoteReview/sofi1/RemoteFormI-9/MTdhMTNkMGEtY2YxNC00ZDVhLWI0Y2YtYzJiZWViZWFiZWFi>



Important: The link will expire after 3 days of being generated. Ask the employee to send a new link to you if this happens.

4. Follow the instructions and prompts for information:
 - a. Enter your **Personal Information** (it will default to what the employee entered)
 - b. Check the **'I Agree'** field

Enter Your Personal Information


Confirm or correct your personal information. You can also enter additional information.

First Name *	Authorized
Last Name *	Representative
Email *	test@gmail.com
Phone Number	

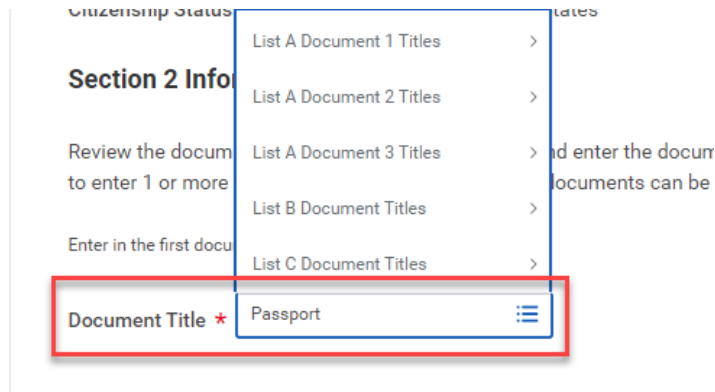
I attest under penalty of perjury that I will complete all information in this form to the best


I Agree *

- c. Click **Next**
- d. Review the work authorization document(s) presented by the employee

 **Important:** The document(s) must be valid and unexpired.

- e. Search for the document by name in the **Document Title** field




 **Tip:** Not sure if the work authorization document(s) is acceptable or what it's called? Check out the list of acceptable documents [here](#).

- f. Enter the **Document Number** and **Expiration Date** (if applicable)
- g. Enter the **Employee's first day of employment**
- h. Type **'Authorized Representative'** in the Title of Authorized Representative field



- i. If the business name and address DO NOT default in the fields, please enter
 - i. Business Name: Social Finance, Inc.
 - ii. Business Address: 234 1st St San Francisco, CA 94105
- j. Upload copies or pictures of the work authorization document(s) you reviewed

 **Important:** The document copies must clearly show the document number, expiration date, and photo (if applicable). In addition, please attach a copy of the front AND back of the IDs to the process.

- k. Click **Submit**
- l. Remind the employee to log in to Workday to submit the final step of the Form I-9 process



Note: A member of the People Operations team at SoFi will review all information. If anything is incorrect or incomplete, the employee will work with you to resolve the issue and resubmit information if necessary.

Thank you for helping us remain compliant as we verify the work authorization and identity of our employees!

Questions

Don't see the question you have within this document? We're happy to help you find the answer! Please reach out to the People Operations team at hr@sofi.org.