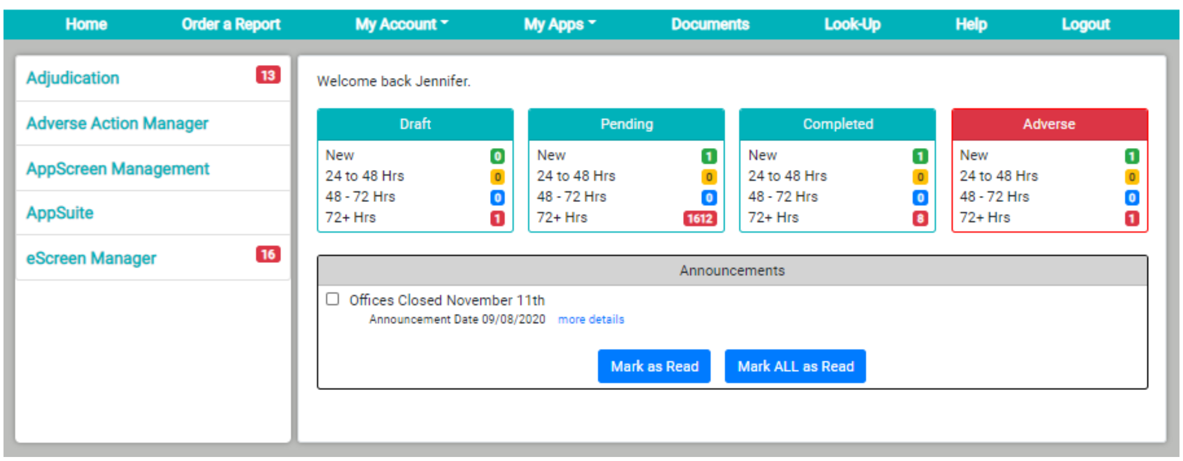
CUSTOMER MANUAL

Contents

Dashboard

- Home returns you to this dashboard
- Order a Report starts the manual order entry process
- My Account allows you to view the company detail, manage account users, view invoices and run client reports
- My Apps is a list of apps available to your account and can also be accessed in left hand menu
- Documents is a reference section with links to most frequently requested information
- Look-Up is a search feature to find a report or list of reports
- Help gives you quick access to submitting a question to our support center

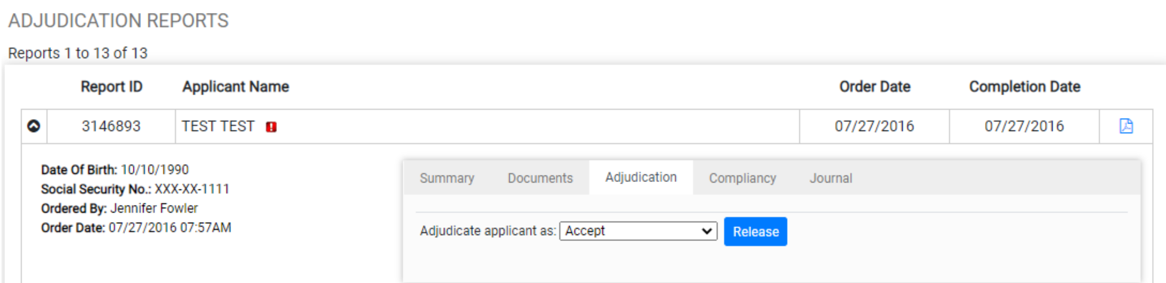
The Draft, Pending, Completed and Adverse Tiles are used to access your reports in each of those areas. The Announcements tile is where you will find information on office closures, system updates or recent compliance updates. At times, you could have other dashboard indicators appear. See the Dashboard Notices section for more information.



My Apps

Adjudication App

Adjudication is the process of applying your organization's criteria to a report to determine if a candidate is acceptable based on the findings in the report. Clicking the Adjudication menu link will open a list of applicants and their reports for you to review. You will select the status from a drop down list to apply that status to your applicant's report. You can use the 'Journal' tab to make notes or review previous entries.



Adverse Action Manager App

Adverse Action is the process of notifying applicants of adverse findings in their report that disqualify them from volunteering for or being employed by your organization. Clicking the Adverse Action Manager menu will allow you to generate the Pre-Adverse Action Letter for the applicant to review in the myApp portal and eventually the final Adverse Action Letter. These candidates are triggered once Adjudication has taken place and a reject/fail status has been applied to the report. Our system will timestamp each time these documents are viewed by your applicants so you know they have been seen.

Appscreen Management App

Appscreen is the process of inviting applicants to complete an electronic application so a background report can be ordered. This will be discussed in greater detail in the Appscreen Configuration section. This app will eventually go away and merge into the AppSuite App.

AppSuite App

AppSuite is the management of positions, applications and your job board if you are using our public link access. In the future, the Appscreen menu will go away and all positions and invitations will be managed here.

eScreen Manager App

eScreen is the convenient way to manage and schedule drug tests for your candidates. You must have a drug screen account set up in order to use this feature.

Manage Account Settings

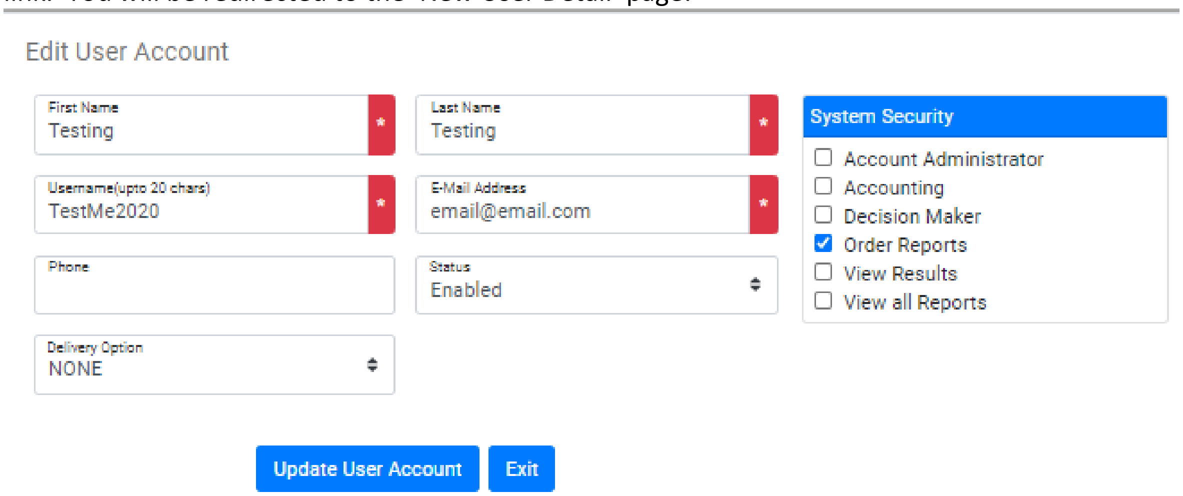
To Manage your account settings, go to the 'My Account' tab in your menu bar and select from the dropdown list.

Company Detail

We recommend reviewing this information and confirming it is correct. Contact us if any changes are needed. Updating this manually will not update our records so please let us know if any changes are needed.

Account Users

The administrator can add, delete and edit all users. To add a new user, click on the 'Create User' link. You will be redirected to the 'New User Detail' page:



- Provide user information and valid email address. We do not recommend changing delivery option to email. It is more secure to have users log in to the system to review reports.
- System security will be the level of permission you allow the user.

  - Account Administrator – Full access with account edit capabilities
  - Accounting – Access limited to invoicing found under the 'My Account' heading.
  - Decision Maker – Administrator Rights without access to invoicing.
  - Order Reports – Gives user ability to order services.
  - View Results – Gives user ability to view results of the orders they placed.
  - View all Reports – Gives user ability to view results for all orders placed whether they placed the order or another user on the account placed the order.

Invoicing

The 'Administrator' and 'Accounting' users may review Invoice History and/or view an individual invoice at any time. Hover over 'My Account' in the header row, move your mouse over 'Invoicing' and click. The screen will refresh and you will be redirected to the 'Invoice History' page.

Click the invoice link (invoice #) you wish to review. A new screen will open with a PDF version of the invoice summary and detail. You may print or save this invoice for your records. Once viewed, close the invoice pop up window.

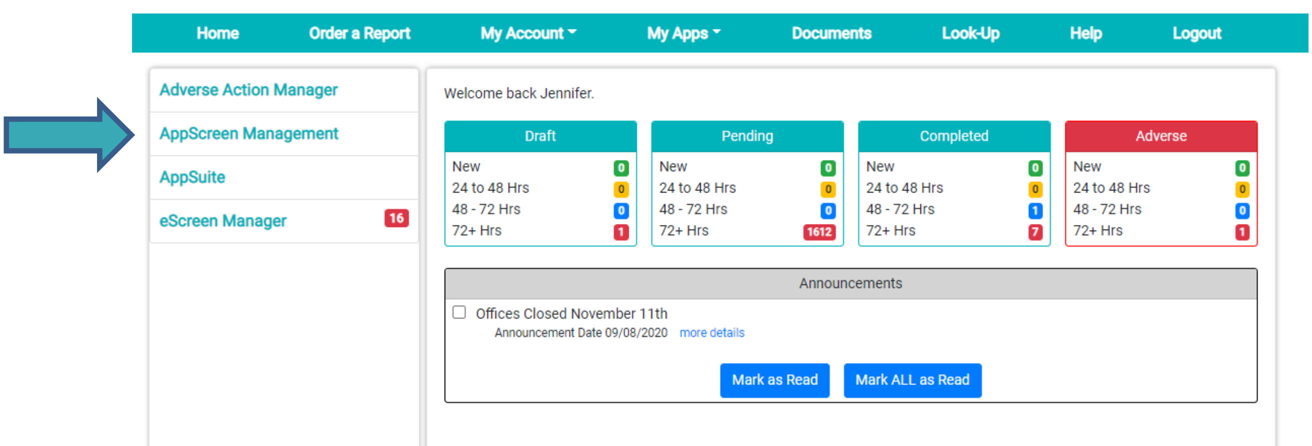
Reports

There are several report templates you can use to run reports for different search types. Additional reports can be created in the Look Up menu using parameters you input such as all reports with a Record for a particular timeframe.

Appscreen Configuration

(soon to be referred to as myApp portal) **please note, if you will not be sending invitations to candidates to complete the online process, you can skip to Ordering Background Checks**

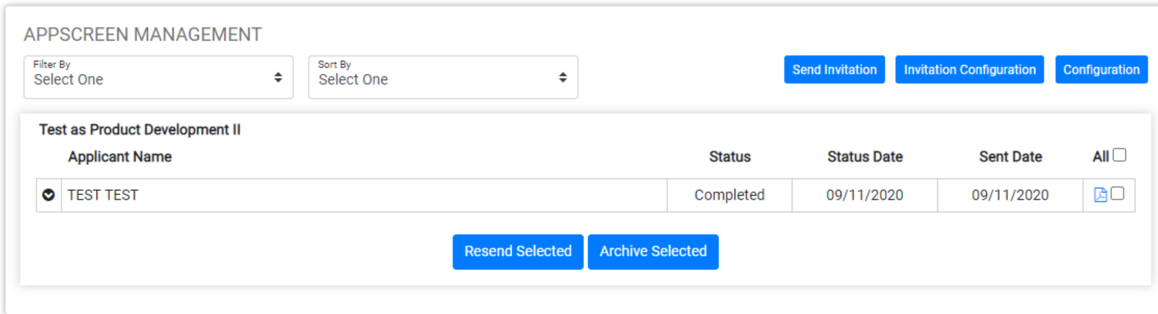
After logging in, select Appscreen Management

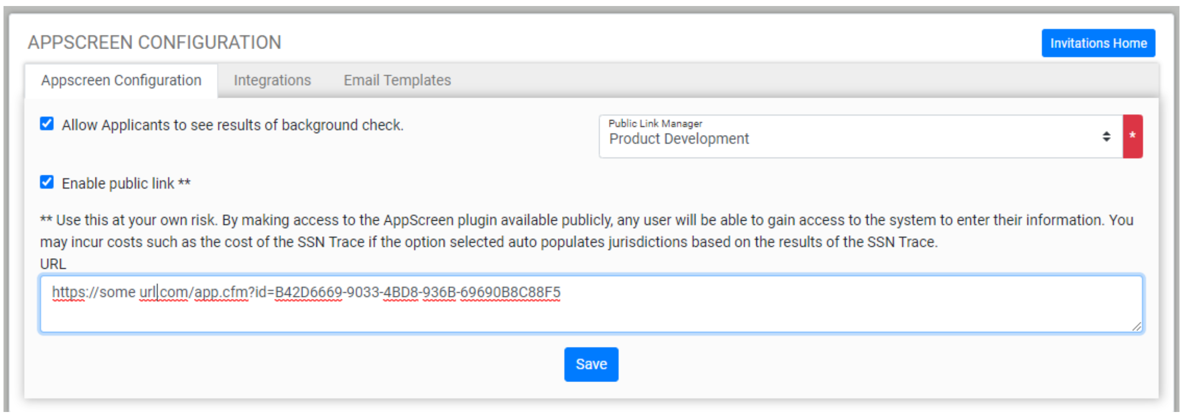


The screen will refresh and you will be redirected to the AppScreen Invitation Dashboard.

Configuration (Step 1)

Select the Configuration button



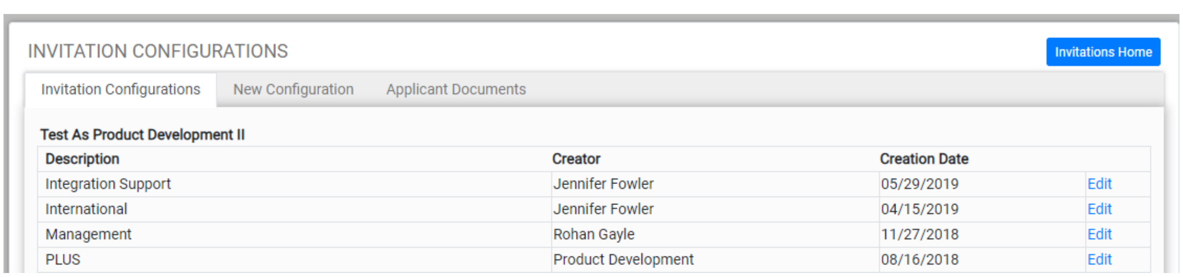


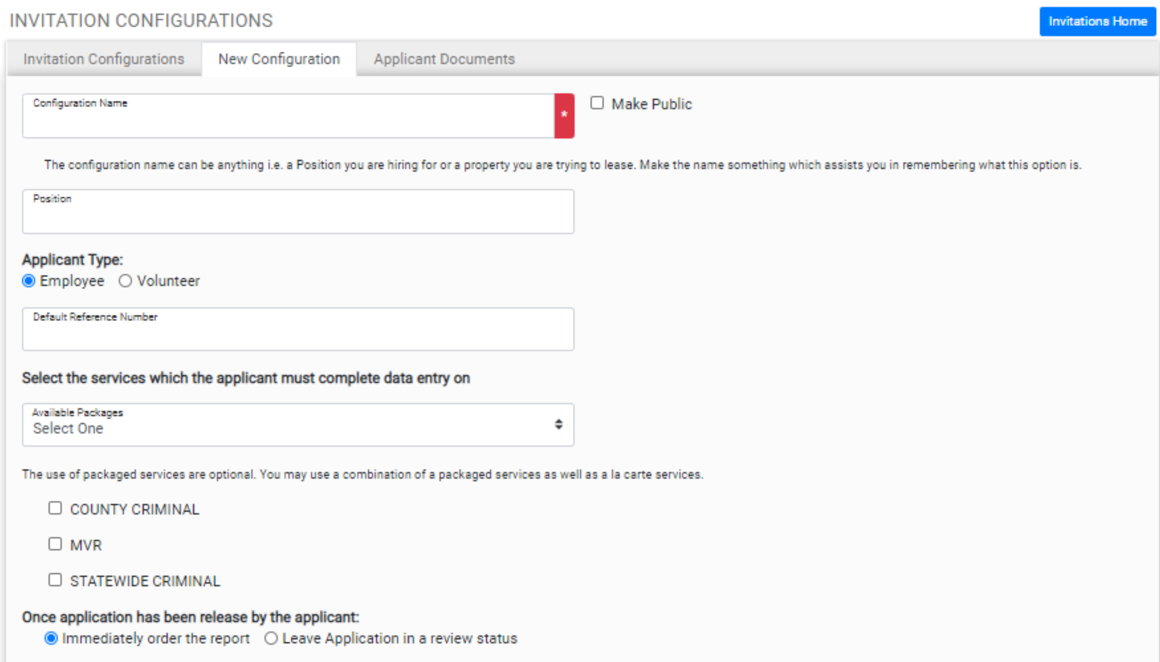
On this page, you can choose to allow your applicants to view their results of their background check, enable a public link that you can share with your applicants directly for them to access and select a position to apply for and select the public link manager (one of your users) who will receive any notifications related to the public link applications.

Invitation Configuration (Step 2)

Next, create your invitations. These are the various positions that you will tie to a specific type of package or group of services. The information your candidate is asked to supply will be dependent on what type of service is being ordered. Example, if your package included an education verification, the candidate will be asked to supply their education history.

Start by selecting the “New Configuration” tab





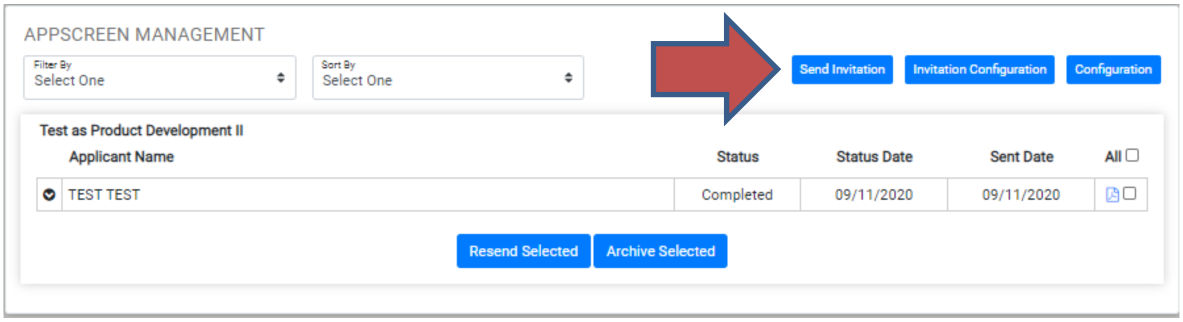
- Give your configuration a name (this is what applicants will see) and check to "Make Public" if you will be using the public link url from the previous step.
- Select Applicant type and enter a billing reference if desired.
- Next select the package or group of services that you want ordered any time an applicant applies for this position.
- Choose to have the report ordered immediately upon applicant submission or select to leave the application in a review status which will require you to manually release the order later.
- Save

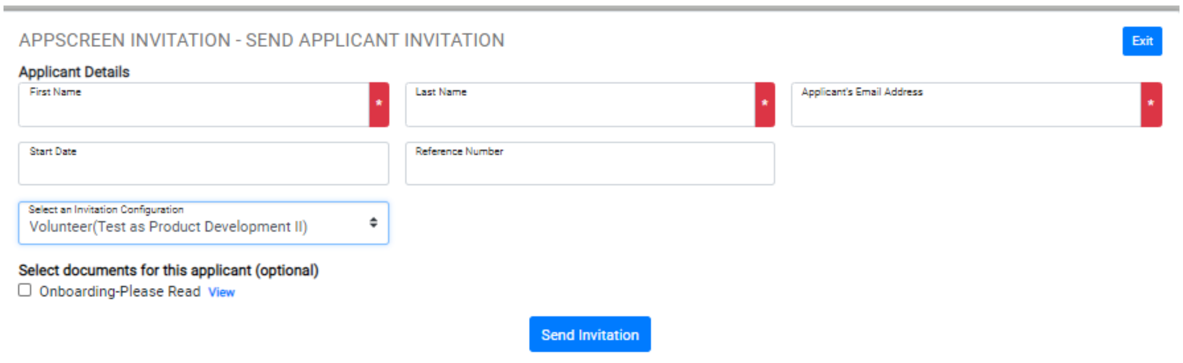
Applicant Documents (Step 3)

If you have documents that you will need your applicants to review during the application process, select the "Applicant Documents". Follow the steps to upload, name and save a pdf. At the time of 'inviting' an applicant to apply, you will have the option to select documents you want them to view.

Send Invitation (Step 4)

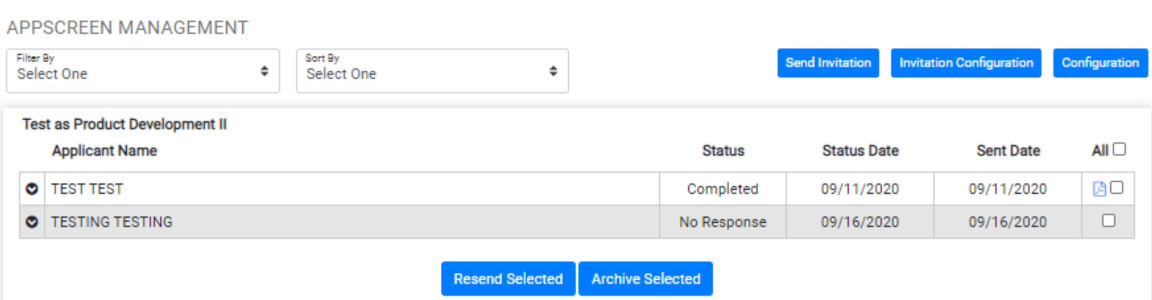
Once your invitations have been configured, you are ready to begin ordering using this process. Click the Invitation Configuration button in Appscreen Management. Appscreen Mgt is also where you will be able to view all of your invitations. Names will fall of the list after 60 days.





- Enter the applicant's first/last name, email address (must be exact as this becomes the username during the login process)
- Start date and reference number are optional
- Select an invitation from your dropdown list (these are the invitations you created in Step 2)
- Check any documents you want your applicant to review
- Send Invitation

The page will refresh and you will see the invitation you sent added to your dashboard.



Appscreen Applicant Process

Once the invitation has been sent, the applicant will be contacted via email. The emails will come from our company domain so we can track them. One email will contain the link to our myApp portal and their username, which is their email address, and the other email will contain a one-time temporary password. It will be a generic email introducing them to our myApp portal.

Subject: Background Check ordered by #Client Company Name#

#applicant Name#,

#Client Company Name# is in the process of requesting your background check.

- **Access your Portal:** We have created credentials for you to access your myApp portal. You will use this portal to submit any additional information and/or documents that may be required as part of the background screening process. Please note that no further action may be necessary.
- **Additional Action:** Please watch for any additional email notifications.

****Please use the link below to access your myApp Portal****

URL to Login: #my app portal url#

Username: #applicant's email address#

Your temporary password will be sent in a separate email. The first time you login you will be required to create your own password.

Thank You,

Customer Service

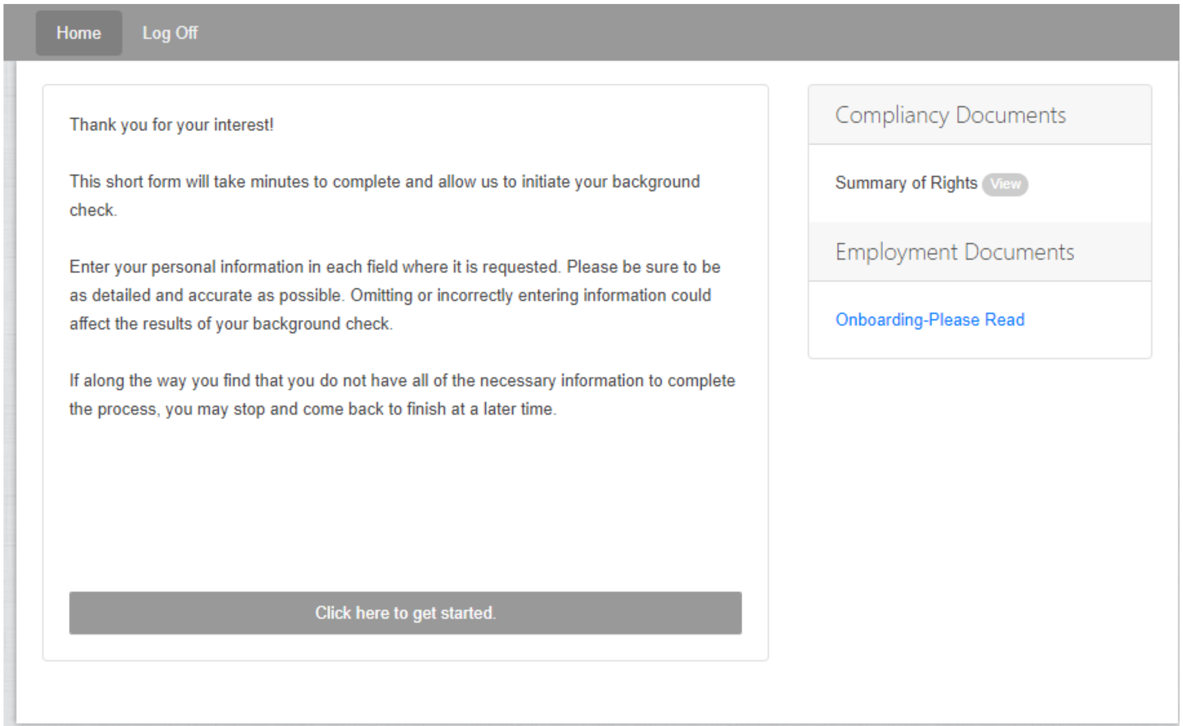
#Background Check Company Name#

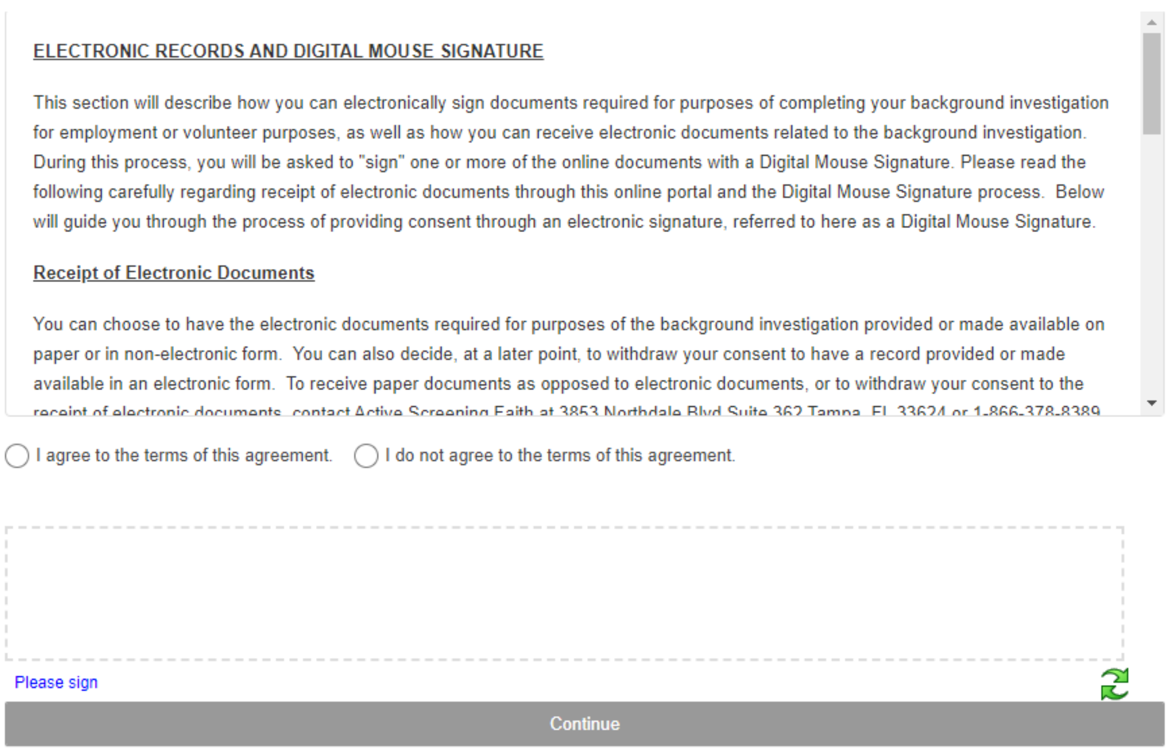
URL to Login: #my app portal url#

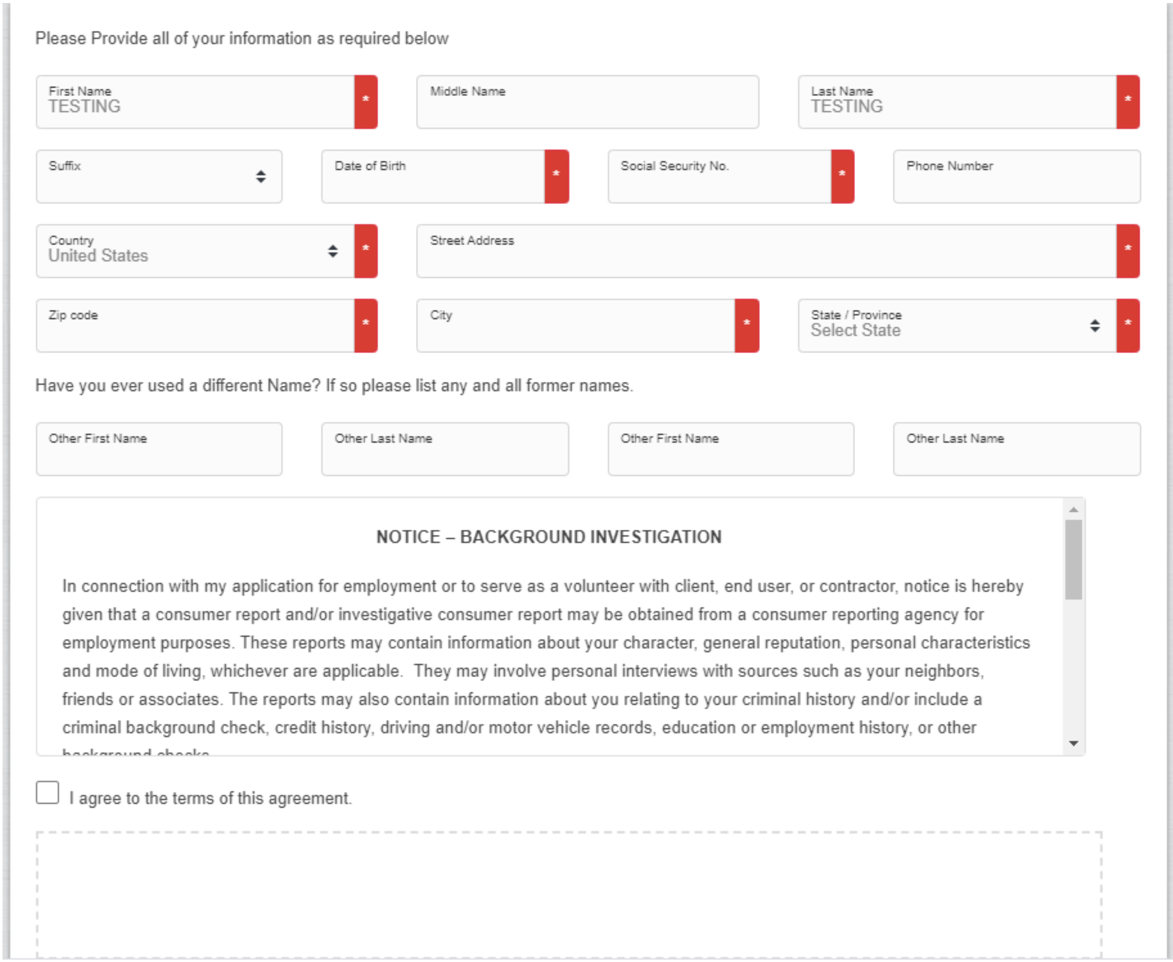
username: #applicant's email address#

Using their unique credentials, they will be able to log in later to the portal to view results (when that option was given by the customer) or to complete a started application later.

Once they begin your invitation, they will see your welcome message and view any additional documents you requested be reviewed. Once finished, the order will be submitted or sent to draft depending on the set up of the application invitation. Here are the different pages the applicant will go through.







Please Provide all of your information as required below

First Name
TESTING
*

Middle Name

Last Name
TESTING
*

Suffix

Date of Birth
*

Social Security No.
*

Phone Number

Country
United States
*

Street Address
*

Zip code
*

City
*

State / Province
Select State
*

Have you ever used a different Name? If so please list any and all former names.

Other First Name

Other Last Name

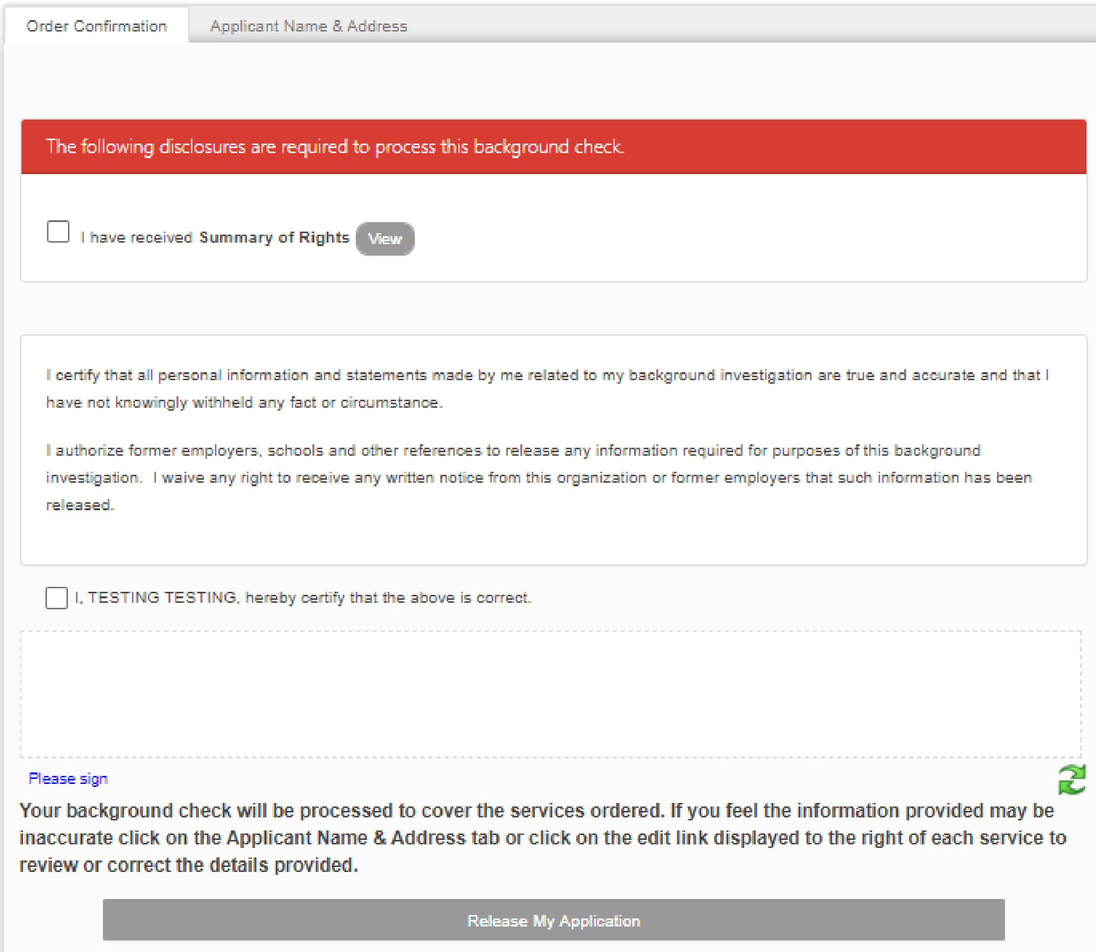
Other First Name

Other Last Name

NOTICE – BACKGROUND INVESTIGATION

In connection with my application for employment or to serve as a volunteer with client, end user, or contractor, notice is hereby given that a consumer report and/or investigative consumer report may be obtained from a consumer reporting agency for employment purposes. These reports may contain information about your character, general reputation, personal characteristics and mode of living, whichever are applicable. They may involve personal interviews with sources such as your neighbors, friends or associates. The reports may also contain information about you relating to your criminal history and/or include a criminal background check, credit history, driving and/or motor vehicle records, education or employment history, or other

I agree to the terms of this agreement.



(If you selected to 'Immediately order the report' on the Invitation Configuration page, the application/release submission will send the order to be processed. If you chose to 'Leave application in a review status,' the order submission will show up in your dashboard "Draft" section for you to review and submit. An SSN trace will always run to verify address history and your account will be charged for this search regardless if you order the remaining searches or not.)

To order the pending or draft services within an entire report, click on the drop down arrow ( ) next to the Report Id of the applicant in question. This will open the Summary window. Click the 'Order Report' link.

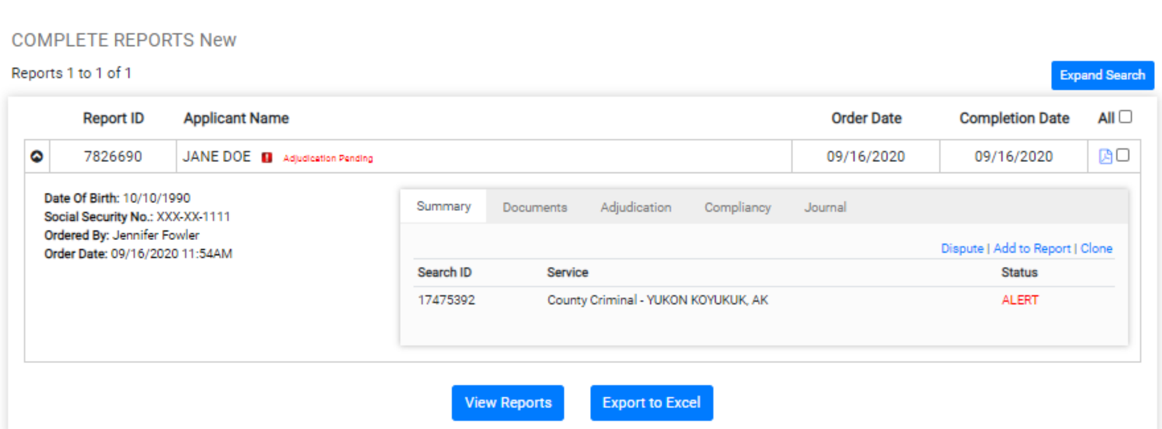
Ordering Background Checks Manually

To begin, click 'Order a Report' in your menu

- Select the package or services
- Provide applicant information **note-if you provide the applicant's email address, they will be sent credentials and a link to our myApp portal. The email will state they will only need to login to complete any necessary disclosures or review forms when needed. If no further action is necessary, they will not need to log in but they can access the portal to see the progress of the order you placed.
- Review the order, certify and order the report
- Once the report is ordered, the page will refresh and you will see the status of the order as well as any drug tests currently needing to be scheduled (if you are using our eScreen plug-in for drug tests)

Viewing Completed Reports

Reports can be accessed via your dashboard by clicking on the hyperlinked number. Click the pdf icon to view the full report and use the dropdown arrow to see more details. You can also add additional services to a report here. Cloning a report will duplicate the exact same order so you can place it again. The user can also upload documents, manage the adjudication process (with permission level), create adverse action letters or add notes to the applicant journal.



Dashboard Notices

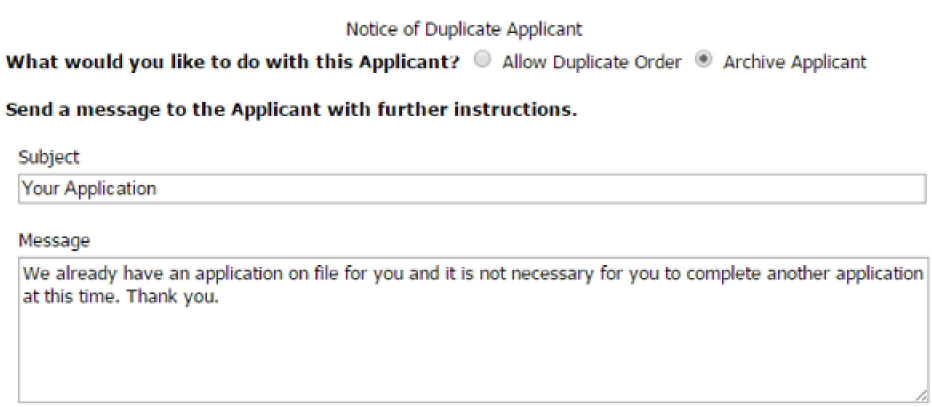
There will be times when special notices will appear on your dashboard. These are used to get your attention to specific items.

Applicant Invitation On Hold

When this notice appears, the system is indicating that an invitation could be a duplicate and your approval is needed for it to continue. This occurs when an applicant is sent a duplicate invitation or has previously applied within a certain time frame (our default is 180 days). The applicant will also be warned and their application process will be interrupted.

Customer steps: Click the "Send Notice" link in Appscreen Management to continue.

You will have the option to allow the duplicate order or archive the applicant and customize the email being sent to the applicant. An email is sent to the applicant in both options. If the option is to have the applicant continue the invitation process, they will be sent the same link and credentials again but no previous information entered will be present.



Release Forms Indicator

If there are release forms to be completed by your applicant that are preventing orders from completing, they will be noted here.

Email Queue Indicator

Our system will monitor invitations or notices sent out and alert you if there is a problem with an email address. Clicking this queue will bring you to a list of emails that may have been blocked. You can correct edit the email address, resend the email or remove it from the email queue.

Requesting Help

Use the Help button in your navigation bar to send us an email. Our support team will respond as quickly as they can.