peopleG2
HUMAN CAPITAL INTELLIGENCE

Client Screening Portal Guide_____

A quick guide to help you get the most out of your online background screening client portal

*Please note we highly recommend for Safety, Security, and Speed you utilize the Firefox web browser. If you need to use Internet Explorer or Google Chrome please make sure you download the latest version.

Overview

Welcome to the Client Screening Portal, the easiest and most advanced way ever to order background screens and manage the results. From any computer, you can log in and access your applicants securely, order a new report, and even change your own account settings.

Your client portal has been designed for quick access to the information you need most, whether you're looking up a specific applicant, finding all recent applicants with possible records or discrepancies, quickly ordering a standard background check, or compiling statistics for the last week or month.

This guide contains four main sections as follows:

- [Ordering a report](#)

- [Finding a report](#)

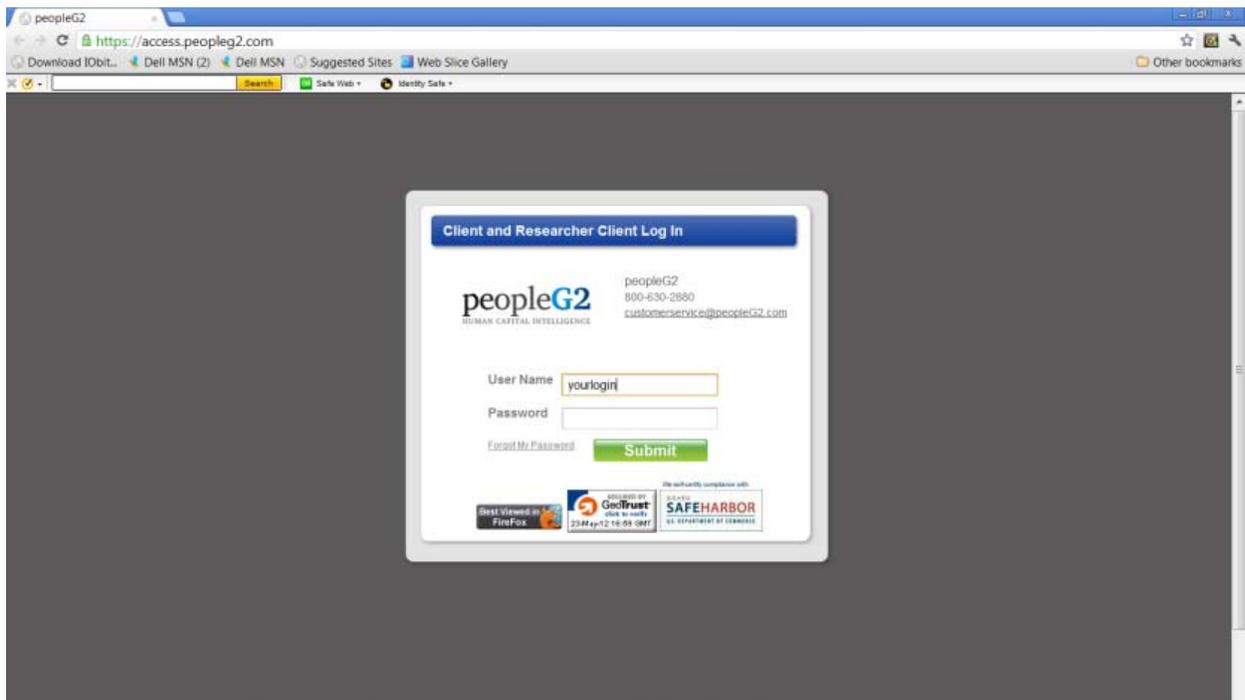- [Managing reports](#)

- [Managing your account](#)

If you have any questions that are not covered in this manual, we encourage you to contact us directly.

Client Portal User Guide

Ordering a report

Go to our home page and click on "Client Login":

Enter your assigned User Name & Password:

To order a new background report click on "Order Report":

From here, you will:

- [Enter applicant information](#)
- [Choose a background package, or pick from a list of individual searches](#)
- [Auto-populate your searches](#)
- [Enter details for searches](#)
- [Confirm and submit your order](#)

Enter applicant information

At the top of the page, enter the basic information about the applicant, including name, date of birth, social security number, and address, as shown below.

Make sure to include all information you have. If you leave out a required field - for example, if you leave out the date of birth when ordering a county criminal - the system will flag you upon ordering that you need to supply that field.

Depending on your setup, you may have one or more of the optional fields as shown below.
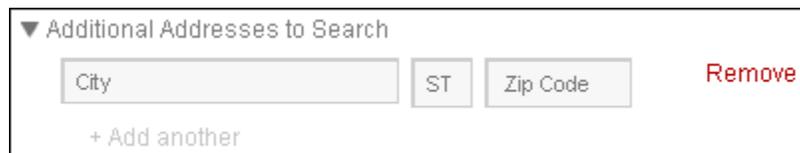

Here are explanations for these fields:
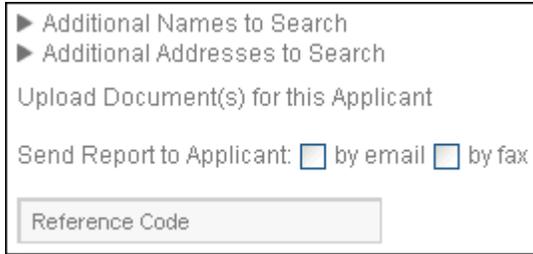
- **Additional Names to Search**: Click this link to add one or more names as AKA's (maiden names or alternate names). This will allow you to order searches for multiple names simultaneously. You can add extra names by clicking **+ Add another**, or remove a name you've already added by clicking the **Remove** link on the right.

- **Additional Addresses to Search**: Click this link to add one or more sets of City, State, and Zip to the order. This will make it easier to auto-populate searches like County and Statewide Criminal searches later. You can add extra addresses by clicking **+ Add another**, or remove an address you've already added by clicking the **Remove** link on the right.

- **Upload Document(s) for this Applicant**: Click this link to upload a release form or other document that will accompany this background screening order. By uploading necessary documents at this stage, rather than faxing or emailing them, you can cut down on the turnaround time for the background screen.

- **Send Report to Applicant**: If this option is visible, then you can ensure that a final copy of the report is sent automatically to the applicant, in addition to being made available to you. Check by email or by fax, or both, to choose the delivery method, and the system will prompt you to enter the email and/or fax number as shown.

- **Reference Code**: If you want to tag this search with a reference code, billing code, department code, or something similar, enter it into this field and it will be stored with your search, as well as appearing on the detailed invoice.

Choose a package or pick your searches

Depending on your setup, you may be able to order custom packages, individual searches, or both. Just click the dropdown next to **Select Package** as shown below. Then you can choose from pre-defined **Company Packages**, if available, or you can select your own searches by choosing **Order Individual Searches**.

If you choose a company package, then the searches included in that package will be automatically chosen and ready. If you choose to order individual searches, then you can click on the searches you want to order as explained below.

Auto-populate your searches

Before you fill in details of your searches, it's usually a good idea to populate your searches with past address history. This means that the system will automatically fill in counties and states for several common criminal and civil searches based on the address (or addresses) you enter for the applicant, plus any addresses found by running a Past Address History search. This will save you a lot of time in entering your searches.

Just check the box that reads **Populate Searches with Past Address History**, as shown below. Then, as you choose searches or a package, any eligible searches will automatically fill in counties and states, which you can then review by clicking the search name.
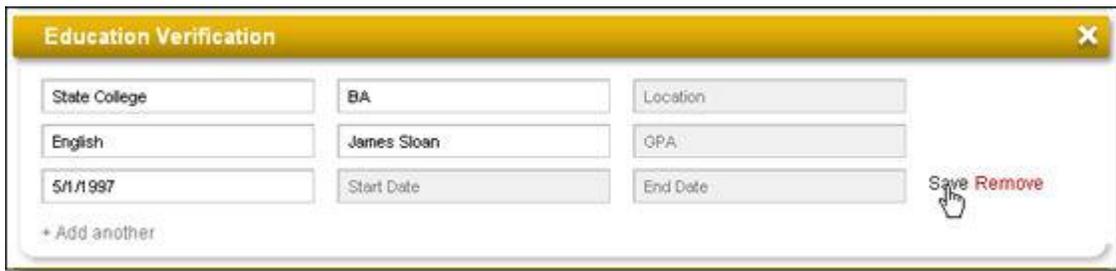

Enter details for searches

When you pick a package, or as you click on individual search names to order them, any searches that require additional information will have an orange background; any searches that are completed will have a green background.

When you click on an orange-colored search, you'll be able to fill in the necessary fields. Remember to click **Save** when finished; this will validate what you enter. As long as the bar is orange, the search is not yet completely entered, so remember to click <u>Save</u>.

Notice that the name of the field displays in the field itself. Once you've typed something in a field, if you need to remember the field name, just roll your mouse over the field as shown.

Adding more entries to a single search

You can also add additional schools, employers, counties, and so on under a specific search. Just click the **+ Add another** link at the bottom of any search section after clicking the search title.

Adding and removing search types

As you are ordering, you can add or remove search types at any time.

To remove a search type, just click the **X** to the far right of the search name. If you remove it accidentally, just re-click the title to add it again; all your previously saved information will be remembered.

To add a new search, click any search name that's currently gray (meaning it's not part of the current order). This will change the search name to orange or green; if it changes to orange, you can add the details as mentioned above.

You will often have a **Show More Searches** button at the bottom, showing you searches that are not part of the package or that you have not ordered previously. Click this button to review other searches you can order.

Confirm and submit your order

When you have entered all necessary information, scroll to the top of the page. From here, you can click the button on the top right to confirm and place your order.

If any fields are not the right format, or any searches have not been saved (and still have orange titles), you'll be prompted to make corrections before you submit.

Note: If you usually order the same set of searches - whether it's a package or a custom set of searches - you can save your order as a personal package before clicking . Just click the **Save order configuration for use in future orders** option above the search names, then name your personal package as demonstrated below.

What's more, if you normally order this same package for all applicants, you can check **Set this as your default ordering package**. That way, the next time you begin an order, the package will be auto-selected before you even enter the applicant's personal information. (You can always choose a different package or modify your searches, even if you set a default ordering package.)

Client Portal User Guide

Finding an applicant

If you want to quickly find the status or pull a report for any applicant, whether in progress or completed, you can do it easily through your client portal. There are three basic ways to find an applicant:

- Quick Find

- Advanced Search

- Browse by Status

Quick Find

You can use the Quick Find, located at the top of almost every page in your portal, to locate an applicant by first or last name. Just start typing the first few letters of the first or last name, and the system will suggest a list of matching applicants.
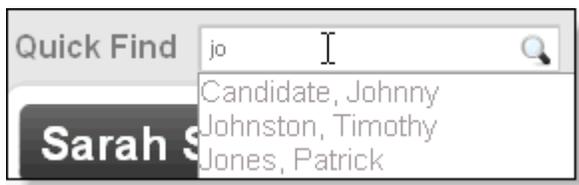
Notice that, in the example above, both first names (Johnny) and last names (Johnston and Jones) are matched. This means you can search by either first or last name from the same field. (If you need to search by first and last name at the same time, see Advanced Search.)

When you find the applicant you want, click his/her name, then click the 🔍 icon to the right to bring up the applicant's detail window (see Managing applicants).

Advanced Search

If you need to search for applicants by date of birth, social security number, date ordered, or any combination of factors, you can use the Advanced Search, which is linked at the top of most pages (next to the Quick Find) as shown below.

The Advanced Search page allows you to search by one or more fields as shown below.

9

Just fill in the field or fields you wish to search by. If you fill in more than one field, only applicants that match all fields will be found.

If you have permission to view reports ordered by other users at your company, or you are branch manager, you'll also be able to search by user or by branch as shown below. You can also search for items with a specific client reference code (as explained in the Enter Applicant Information section of the Ordering a report instructions) as shown.

The results you get will be a list of matching applicants, similar to the lists shown in the next section.

Browse by Status

When you're on the home page or any report management page, you'll see a listing of statuses along with how many applicants are in each status.

Just click the appropriate icon, and you'll get a list of all the applicants in that status. Here's a brief explanation of each status.

- **In Progress**: The applicant still has one or more searches that have not been completed. This way, you can keep track of an applicant in real time, even if there are a few searches still pending.

- **Completed**: The applicant's background check is completely finished. You can leave an applicant in this status as long as you like; eventually, you should move completed applicants to the Archived category as explained next.

- **Archived**: You can move Completed applicants to the Archived category once you no longer need to actively monitor their background check. By doing this, you can use the Completed category more effectively to monitor recently completed applicants.

- **Needs Attn**: This category conveniently shows only applicants that have either 1) an unread status update, or 2) missing information that you need to supply. We recommend that you use this category frequently, as it allows you to more efficiently monitor applicants.

- **Discrepancy**: This category shows you all candidates that have a criminal record, unverified school or employment record, or positive drug test. In other words, you can quickly access applicants that may require adverse action using this category.

When you click a category, you get a list of candidates similar to this:

From here, you can see the names of all applicants in the category, along with some helpful icons as explained below.

Icon notifications

- The blue dot icon indicates that you have not yet looked at this applicant. Once you click and view the applicant, the dot will disappear.

💬 - The blue speech bubble means that there is an unread status update. Applicants with this icon will show up in the Needs Attention category. Once you view the applicant and read the status update, the icon will disappear.

⚠️ - The yellow alert icon tells you that you need to submit additional information before this applicant can be fully processed. For example, there may be a missing release form or maiden name. You can supply the missing info directly through the system as explained in Managing applicants. Any applicants with this icon will show up in the Needs Attention category.

🛑 - The red hand icon indicates that there is a discrepancy in the applicant's record, such as a criminal record, unverified school or employment record, or positive drug test. Any applicants with this icon will show up in the Discrepancy category. You can review the specific discrepancy by clicking the icon or the applicant name; see Managing applicants for more information.

Next to each applicant, you'll also see a status bar, which shows you how many searches are completed for that applicant's background check. The status bar is updated in real time, so you can check online any time you wish. If an applicant has a complete background check, their status bar will be green as shown below.

You can click anywhere within the row containing an applicant's name to get to the applicant detail window, which is described in Managing applicants.

Sorting the applicant list

Each column heading in the list of applicants can be clicked once to sort by that column, or clicked twice to reverse sort by that column. By default, the list is sorted by applicant name, but you can sort by which applicants are unread, which applicants have discrepancies, and so on by simply clicking the appropriate heading.

In the example below, we have sorted by the Discrepancy column simply by clicking the icon at the top, which shows us all discrepancies first.

Paging through and viewing all applicants

By default, only 8 applicants are shown per page to keep you from having to scroll too much. If you have more than 8 applicants, you can navigate to the first, next, previous, or last page of applicants using the links in the bottom right.

If you would rather view all applicants on screen at one time, you can click the **View All** link in the lower left to show all applicants on the screen at once. Then, to go back to paging through applicants, you can click the **View 8 at a time** link in the lower left.

Mass-archiving applicants

You can archive individual applicants whose background checks are complete, as explained in Archiving an applicant under Managing applicants. However, you may find it more convenient to archive several, or all, completed applicants at once.

If you bring up all completed applicants, for example, you'll see checkboxes along the left allowing you to quickly archive one or more applicants. (These checkboxes will only show next to completed applicants, since you can't archive an applicant still in progress.)

Just check off the applicants you wish to archive, and then click the button at the bottom.

If you wish to archive *all* completed applicants at once, click the **Archive all** link next to the Completed category as shown below.

Note: You cannot undo the **Archive All** action, as there is no way to mass-unarchive, so use this technique carefully!

Managing applicants

There are several ways to manage applicants in your online screening portal, including viewing complete reports, requesting status updates, archiving applicants, and ordering more searches. To begin managing an applicant, simply find the applicant you desire (as explained in Finding an applicant). If you use the Quick Find, then the applicant detail window will display immediately. If you use the advanced search or browse by category feature, you can click on the desired applicant (on the name or anywhere within the row) to bring up the detail window.

Here's a typical detail window - in this example, for an applicant still pending completion.

Navigating among records

If you clicked on this applicant from a list of applicants, then you'll see three links in the upper left.

- **Back to List** takes you back to the list of applicants you had originally searched for; for example, if you're viewing an applicant after browsing for all In Progress applicants, then this link returns you to the In Progress list.

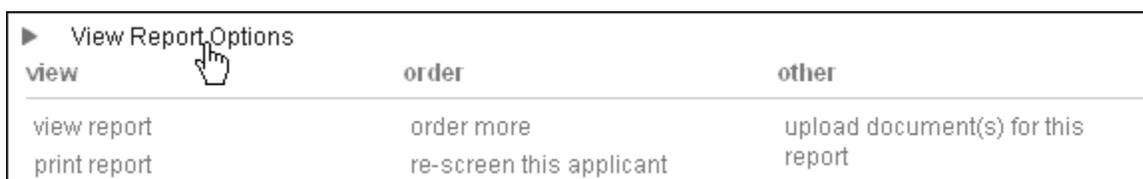- Previous Applicant takes you to the former applicant

Report Options

At the top of the page, you'll see the report summary, with the main information on the applicant, the current status (**In Progress** for the sample above), and the report progress

bar and iconic notifications on the right. (See Icon notifications under Finding an applicant for details on what these icons mean.)

To view the complete background screening report on this applicant, whether completed or not, you can click the applicant's name or the status. Either way, a new window will open with the completed report, which you can view or print.

You'll see a **View Report Options** link just under the DOB in this top summary. You can click this link to open up further options as shown below.


- **view report**: This link does the same as clicking the applicant name or status; it brings up the complete report in a separate window for viewing.

- **print report**: This link also brings up the complete report, but in addition, it will automatically initiate printing of the report and allow you to choose a printer like usual. (If you want to print the report but you used the **view report** link, just press CTRL+P on a PC or Command+P on a Mac. This works for any web page.)

- **order more**: Click this link to order more searches for this applicant, which will become part of the same report. For example, you can use it to order a pre-adverse action letter for an applicant who failed their background check.

- **re-screen this applicant**: This link allows you to order an entirely new copy of the same report for this applicant, and it auto-fills all the information. That way, you can run all the same searches again, or you can remove or add searches as you see fit (as explained in Enter details under Ordering a report).

- **upload document(s) for this report**: Use this link to upload any documents needed to process this applicant. For example, if the report requires a release form, and you did not upload the release form during the screening process, you can do so now.

Archiving an applicant

If you are viewing a completed applicant (where the entire background check and all searches within it have been completed), you'll have the option to archive that applicant. This simply moves the applicant from the Completed category to the Archived category, which makes your Completed category more useful by only containing recently completed applicants you're still interested in.

Just click the **archive this report** link to archive the applicant, as shown below. Note that this link will only appear for a completed applicant.
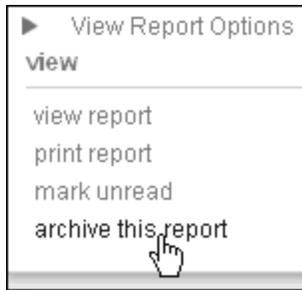
You can also unarchive an archived applicant in the same way. An archived applicant will have an **unarchive this report** link under Report Options.

Also, you can mass-archive applicants for greater convenience, as explained in Mass-archiving applicants under Finding an applicant.

Search Types

Below the report options, you'll see a listing of all searches that are part of this applicant's report. Next to each, you'll see icons that show whether the search has a discrepancy, an unread status update, or needs your attention due to missing data (as explained in Icon notifications under Finding an applicant).

To the right of each search name is a box that may or may not contain a checkmark. If the box contains a checkmark ✔ , then the search has been completed; if it does not ☐ , then the search is still in progress.

You can click on any search name to bring up details and options in the right half of the screen. For example, if the search has a record, you'll see a **Record** link. You can click this link to bring up the details on that search from the final report - not the whole report, but just the portion that pertains to this search. This way, you can quickly see the details of the search without scrolling through the entire report.

In addition, if the search is still in progress, you'll see a **Status Request** link. You can click this link to send in a request for the status of this search.

If the search has the Needs Attention icon ⚠, then you'll see a request for missing information in the Notes section at the bottom left after you click that search. In the example below, you are prompted to provide a drivers license number.
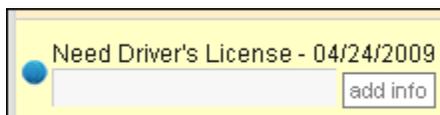
Documents and Notes

At the bottom of the screen, you can view any uploaded documents or any recorded notes for the search that has been selected from the Search Types section. You can also upload a new search-specific document or add a note for your own purposes using the **Add doc** and **Add note** links you see in these sections.

Managing your account

Your online screening portal gives you access to several convenient features that allow you to quickly access information such as invoices, documents, and statistics report, as well as to change your notification and user settings in real time.

To access your account settings, just click the **My Account** tab in the upper right corner. Then you can use the links along the right to find the section and page you're interested in. Each is explained below.

Profile

There are up to five different sections you can access under the Profile section; each is a separate link on the left-hand side. Each link is explained below.

On each page described, make sure you click **Update** when finished making changes.

- **My Account Info**: This section allows you to update basic profile information about yourself, including:

  - **User Information**: You can update the name, phone number, and main email address for your account. This may affect the header on your applicant reports. Note that you cannot change your user ID that you use to log into the system.

  - **User Options**: If you are an administrative user, you can add and remove your own user permissions here. If not, you'll need to ask your main administrative user if you need access to a new feature.

  - **Screening Statistics Report**: Choose how often you'd like to receive the Screening Statistics Report via email. You can also run this report any time for any time period as explained below.

    If you choose to receive the daily report, it will report on the previous day's statistics. The weekly report gives statistics on the previous week, and the monthly report gives statistics on the previous month.

- **My Results**: Use this link to change how you receive system notifications, as well as how often you receive them.

  - **Sending Results**: Here, you can update your email address, fax number, or both. The system will use these when sending you reports and notifications. Below, you will tell the system whether to send you emails, faxes, both, or neither.

    If your email address does not support HTML email, be sure to check the **Can't Receive HTML email** box. That way, you'll receive reports as attachments rather than as HTML emails.

- **Communication Method**: Choose how you want the system to send you reports and notifications. You can choose *Email*, *Fax*, *Email & Fax*, or *Online Only* (meaning you get no notifications at all from the system and must check online for notes and results). In addition, you can choose *Email - Status Only*, which will only send you email status updates, but will not send you completed reports or notifications.

- **Result Delivery Timing**: These options allow you to choose how often the system sends you notifications about reports.

  - **Send Immediately**: You will get an update each time a search is completed for an applicant. That is, if one applicant has 6 different searches, you'll get up to 6 different emails - one each time that one or more searches is completed.

  - **When Report is Completed**: You will get an update when the entire report is complete for the applicant. This is the most common setting.

  - **Batch Searches**: If you order a lot of searches, you can receive updates every two hours when searches complete. Any searches that have been completed since two hours ago will be sent to you in a single email.

  - **Batch Reports**: This is just like the previous option, except that you will only get an email if one or more reports were completed in the last two hours.

  - **Online**: You will not receive any notification when searches or reports are completed. You will, however, receive notifications of updates or items that need attention, assuming you choose a communication method other than *Online Only*.

- **My Password**: Access this page to update your password used to access your client portal. Just enter your old password, then enter your new password twice to confirm. Once you press [Update], your password will be changed the next time you log on.

  If you don't remember your password, you can use the **Forgot Password?** link on the client portal login page to retrieve it.

- **Company Info**: You'll only see this link if you have administrative access. You can use it to modify the company name, email address, address, and fax number that normally appear as the return address on your final reports.

  In addition, you can modify the accounting email and accounting fax which are used to send you invoices.

- **My Documents**: You can access any documents we have made available to you from this page, securely and conveniently. Just click any document link to download it to your computer.

User Info

Only administrative users see this section, which allows you to create and modify other users.

- **Add User**: Click this link to create a brand-new user on the system - for example, if you hire another person in HR who will order or manage reports. You will need to fill out:

    - **User Information**: Here, you'll need to fill out a user ID (which must be at least 6 characters with no spaces) and a password (which must be at least 6 characters including at least one number, and no spaces) for the user, along with a contact name (first and last), phone, and email.

    - **User Options**: Here, you can choose which permissions to give the new user, including:

        o **Active**: You must check off this box to enable the user to log in. Always check this box for new users, unless you need to delay their ability to log in for some reason.

        o **Administrator**: If you check this box, then the user can do everything you can do in the client module, including:

            o Change his/her own user permissions

            o Add other users and choose their permissions

            o Change contact info and permissions (but not passwords) for current users

        o **View Other Users' Reports**: Check this box to allow the user to view not only his/her own ordered reports, but also reports ordered by other users. If you check this box, the user will get two features allowing them to see reports from other users:

            o A **search all users** checkbox added to the **Find My Reports** box on the **Home** tab. Checking this off will change the **Screening Status Box** so that the number of reports in each category reflects all reports from all users.

            o A **User** dropdown on the **Report Management** tab, so the user can find his/her own reports, reports from another user, or reports from all users.

        o **View Branch Reports**: If your company manages branch locations through your client module, check off this permission to enable the user to see reports from branches as well as his/her own reports. With this permission, the user gets the following two features:

            o A **search all branches** checkbox added to the **Find My Reports** box on the **Home** tab. Checking this off will change the **Screening Status Box** so that the number of reports in each category reflects all reports from all branches.

            o A **Branch** dropdown on the **Report Management** tab, so the user can find reports from his/her own client, reports from a branch, or reports from all branches.

- o **View Accounting**: Check this box to allow the user to view and print invoices through the <u>Accounting</u> link under the **My Account** tab in the client module.

- o **Display Applicant Box for All Users' Reports**: If you check this box, then the user will always see all users' reports, not just his/her own, by default in the **Screening Status Box** in the client module. Leave this box unchecked to allow the user to see only his/her own reports by default, with the ability to change that when desired (if you enable **View Other Users' Reports** above).

- o **Order for Branches**: If your company manages branch locations through your client module, check off this permission to allow the user to place orders for branches of his company. This is an effective way to allow a single client user to manage multiple locations or branches without needing multiple logins.

- o **Restrict Results Viewing**: Leave this *unchecked* for most users. If you check this option, then the user *cannot* view the detailed results of any reports. He/she can view the summary and status of reports and searches; however, the <u>view report</u> and <u>print report</u> links are removed, and the status of each search is no longer linked to the details of that search.

- o **Restrict Ordering**: Leave this *unchecked* for most users. If you check this option, then the user *cannot* order reports at all. Checking this option disables the **Order** tab at the top, as well as the <u>add searches to this report</u> link that appear on reports in the client module.

- The rest of the sections on this page (Screening Statistics Report, Sending Results, Communication Method, and Results Delivery Timing) are discussed under <u>Profile</u> above.

- **Edit User**: Click this to bring up a list of all other users in your client portal. You can then click and edit any of these users, using the same fields described above under Add User.

Accounting

This section allows you to view and print past and current invoices, paid or unpaid, using the **Invoices** link. This way, you can securely retrieve any invoice you need at your convenience.

Pricing

You can view both overall search costs and state- or county-specific search costs using the **My Prices** link. Also, you can review court fees for various search types and locations using the **Court Fees** link. Either link displays a simple table of prices for you to review or print.

Reports

From here, you can click **Screening Statistics** to run a statistics report for your company for any date range you choose, as shown below.

Just pick a standard date range, or choose **Custom Date** and enter any two dates you wish (in mm/dd/yyyy format). When you click [Submit], the system will create a statistical report showing all kinds of data from the date range in question.

Subjects Screened	23
Avg Searches per Subject Report	2.65
Total Searches Performed	61
Avg Price per Subject Report	$38.88
Avg Price Per Search	$14.66
% Subjects with Criminal Records	17.39 %
Number of Subjects with Criminal Records	4
% Subjects with Unverifiable Results	4.35 %
Number of Unverified Results	1
% Subjects with Positive Drug Test	0.00 %
Number of Drug Tests with Positive Result	0
Avg Turn Time per Completed Subject Report (hrs)	25.7
Total Price	$894.25

Remember that you can also have this report automatically compiled and sent to you at your convenience. See Profile above for more information.