# Order Manager User Guide

Sterling | July 2023

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## Our modern, intuitive client experience has been redesigned to accelerate hiring decisions

At Sterling, we've made it our mission to provide the foundation of trust and safety our clients need to create great environments for their most essential resource, people.

Sterling is committed to simplifying how people engage throughout the screening process from start to final decision. Based on direct pain points and feedback from HR professionals like yourself, Sterling designed a modern, intuitive, interactive Client Hub and Order Manager to help you manage your daily workload with ease and accelerate time-to-hire.

### HERE'S HOW STERLING DELIVERS AN IMPROVED CLIENT EXPERIENCE:

- A modern, mobile-responsive design that's accessible anytime, anywhere
- A permission-based hub allows users to see what orders are relevant to them
- An intuitive order pipeline that's easy to navigate
- · Easily assign, unassign or reassign orders and invites in the pipeline
- · Conveniently review alerts and updates without ever having to leave your dashboard
- An easy-to-read, actionable Order Manager represents the real-time status of an order and gives you the ability to process, export, score, and add comments and attachments to orders and/or specific searches.

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### **Order Manager**

Sterling's Order Manager is a tool that allows you to intuitively interact with and action orders for your candidates. Order Manager includes an easy-to-read format and gives you the ability to process, export, and add comments & attachments to orders and/or specific searches. Once an order has been completed, you can also access the Consumer Report that is provided to the candidate from the Order Manager.

### **Accessing Order Manager**

There are two ways you can access the Order Manager, depending on if you are in Client Hub or classic ScreeningDirect.

Accessing through Client Hub: To open the Order Manager, simply tap on a candidate's name within the Order Grid. You can navigate through different candidate orders in the Orders Grid using the arrow keys.

Si	terlina	<	Entire	Organization 👻							Help & Resources 🛛 🛕	Mark Smith 🗸
Qu	iick Search Start Order	۹	st	3 3 arted In Progress	1 Action Needed Ready	4 Completed					E	🚉 Filter by Assignee 👻
::	Orders	^		D ID	Candidate	Status / Result	Created $\psi$	Assignee	Client Status	Completed / ETA	Account	Package
	Dashboard			1493496	Smith, Pete	Invite Sent	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
	Advanced Search Recently Viewed			1801811756	Goodman, Sarah	😑 Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
	Historical Records			1801804133	Peterson, Melissa Y.	<ul> <li>Drafted Order</li> </ul>	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
	Reporting	~		1801796343	Martens, Terri I.	Action Needed	2022-09-07	Smith, Mark		2022-09-12	Acme Company	ID Profile
Ð	Platforms	~		1801795950	Durbin, Scott A.	Clear	2022-09-06	Smith, Mark		2022-10-19	Acme Company	Standard + EMP Package
				1801769978	Smith, Cole D.	Pending	2022-08-16	Smith, Mark		2022-08-19	Acme Company	Standard Criminal

Once an order is selected, a drawer will slide out from the right side of the screen, and you will be able to view the candidate's information within the Order Manager.

Scerling 🛛	Entire Organization 👻	Goodman, Sarah #1801811756 🖸	Order Status: Order Result: X Complete Order Result: X
Quick Search Q	3 3 1 4 Started In Progress Action Needed Ready for Review	Overview Searches Attachments Activity Log	•
🕀 Start Order		Order Summary Candidate Ir	nformation
Grders ^	D Candidate Status / Result	Order Started         Order Completed         First Name           2022-09-28         2022-09-28         Sarah	Address 123 First Ave Seattle WA 98116
Dashboard	1493496 Smith, Pete Invite Sent	Account Name Add Ons	Email SarahGoodman@sterlingcheck.co
Advanced Search	□ 1801811756 Goodman, Sarah	Position Last Name Goodman	m
Recently Viewed		Package Blue Account 1990-01-01	Phone 🔁
Historical Records	1801804133 Peterson, Melissa Y.      Drafted Order	Standard Criminal Account Location SSN	Location of Employment
🖬 Reporting 🗸 🗸	1801796343 Martens, Terri I.     Action Needed	BELLEVUE,, WA -	Salary Over \$75.000
➔ Platforms ∨	1801795950         Durbin, Scott A.         Clear		0401 975,000
	1801769978 Smith, Cole D.     Pending	Drafted Searches	~
	1801769572 Jones, Jessica J.     Onsider		
	1801757095 Thompson, Bekcy J. Clear	Submitted Searches	
	1801685863 Jones, James D.     Onsider	Searches         Identifier         Ordered         Com           SSN Trace         921:41-2350         2022-09-28         2022	2-09-28 Complete COMPLETE
	1801578946 Charles, John T.     Consider	County Criminal Record Goodman, Sarah, WA-KING 2022-09-28 2022	2-09-28 Complete CONSIDER
	1801517524 Olson, Tammy I.     Consider	Comprehensive Criminal for Global Goodman, Sarah, United Kingdom 2022-09-28 2022 Screening	2-09-28 Complete CLEAR

In the Order Grid, you can also check the box next to two or more orders and click the Open button from the top of the grid to view the Order Manager for multiple candidates.

Si	terlina	0	Entire (	Organization 👻							Help & Resources	Acrone Company →
	5		_									
Qu		٩	3	3	1	4						😫 Filter by Assignee 👻
			Start	ted In Progress	Action Needed Read	y for Review						
Ð	Start Order											
	Orders	^	1 se	elected						🔀 Open	Assign to 👻	Archive Clear All
	Dashboard											
	Advanced Search			ID	Candidate	Status / Result	Created 🕹	Assignee	Cilent Status	Completed / ETA	Account	Package
	Advanced Search											
	Recently Viewed		$\checkmark$	1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
	Historical Records											
			$\checkmark$	1801811756	Goodman, Sarah	Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
	Reporting	~										
			$\checkmark$	1801804133	Peterson, Melissa Y.	<ul> <li>Drafted Order</li> </ul>	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
€	Platforms	~	_	1901706242	Masters Tanil	Antine Mandad	2022 00 07	County March		2022.00.12	Arme Company	ID Parella
				1001790343	wartens, remit.	- Action Needed	2022-09-07	omith, Mark		2022-07-12	- and a secondarily	ID Frome

Once the drawer slides out from the right side of the screen, you will be able to toggle between your selected orders using the arrows in the top right corner.

Scerling d	Entire Organization 👻	Goodman, Sarah #1801811756 🖸	Order Status: Order Result: Complete Consider X
Quick Search Q	3 3 1 4	Overview Searches Attachments Activity Log	
Start Order	Started In Progress Action Needed Ready for Review	Order Summary	Candidate Information
Crders ^	D Candidate Status / Result	Order Started Order Completed 2022-09-28 2022-09-28	First Name Address Sarah 123 First Ave Seattle, WA 98116
Dashboard	□ 1493496 Smith, Pete ● Invite Sent	Account Name Add Ons ACME COMPANY —	Mildele NameEmailSarahGoodman@sterlingcheck.co
Recently Viewed	🗌 1801811756 Goodman, Sarah 🔶 Consider	Position	Goodman m Eoder Phone 2
Historical Records	1801804133 Peterson, Melissa Y.      Drafted Order	Package Blue Account Standard Criminal Account	1980-01-01 SSN Location of Employment
il. Reporting 🗸 🗸	🗌 1801796343 Martens, Terri I. 🧶 Action Needed	BELLEVUE WA	
Platforms ~	1801795950         Durbin, Scott A.         Clear		

While you are in the Order Manager, you will be able to click the Expand icon at the top left of the Order Manager to expand an order into its own tab.

Scerling	<	Entire Organization 👻	Goodman, Sarah #1801811756 🖸	Order Status: Order Result: Complete <mark>O</mark> Consider	×
Quick Search	٩	3 3 1 4 <sub>Completed</sub>	Overview Searches Attachments Activity Log		<
Start Order		Started In Progress Action Needed Ready for Review	Order Summary	Candidate Information	
Orders	^	D Candidate Status / Result	Order Started Order Completed 2022-09-28 2022-09-28	First Name Address Sarah 123 First Ave Seattle, WA 98116	
Dashboard		□ 1493496 Smith, Pete ● Invite Sent	Account Name Add Ons ACME COMPANY —	Middle Name Email — Email SarahGoodman@sterlingcheck.co	
Advanced Search Recently Viewed		🗌 1801811756 Goodman, Sarah 🕒 Consider	Position	Goodman m -	€
Historical Record	s	1801804133 Peterson, Melissa Y.      Drafted Order	Package Blue Account Standard Criminal Account	1980-01-01 SSN Location of Employment	
il. Reporting	~	🗌 1801796343 Martens, Terri I. 🧶 Action Needed	BELLEVUE, WA		
Platforms	~	1801795950 Durbin, Scott A. Clear			į

Once the Expand icon has been selected, a full screen view of the Order Manager for that candidate will become visible in a separate tab within the current browser.

Goodman, Sarah #1801811	756							Or Co	<sup>rder Status:</sup> omplete	Order Result: Consider
Overview Searches Atta	achments Activity Log								Client Matrix	
	Scerling							• •	Export	
	Order Summary		Condidate Information				G Copy Link			
	Order Summary Order Started	Order Summary Order Started Order Completed		e mornation	Address				Report Comments	
	2022-09-28	2022-09-28	Sarah Middle Name		123 First Ave Seattle, WA 9811	6			Archive	
	ACOME COMPANY Poston — Perkage Standard criminal	Add Uns 	Last Name Goodman D08 1980-01-01 SSN 		Email SarahGoodman@ M Phone — Locastion of Employr — Salary Over \$75,000	Psterlingcheck.co ment				
	Submitted Searches									
	Searches	Identifier	Ordered	Complete	Status	ETA / Result				
	SSN Trace	921-41-2350	2022-09-28	2022-09-28	Complete	COMPLETE				
	County Criminal Record	Goodman, Sarah, WA-KING	2022-09-28	2022-09-28	Complete	CONSIDER				
	Comprehensive Criminal for Global Screening	Goodman, Sarah, United Kingdom	2022-09-28	2022-09-28	Complete	CLEAR				

Accessing through classic ScreeningDirect: You can access the Order Manager from the classic view of ScreeningDirect. Within the classic ScreeningDirect folder list or from the order editor, you can select either Detail New or Summary New, and making one of these selections will direct you to the Order Manager.

<< return to summary					
Background Checks: Complete           Summary New         Detail New         Summary Classic         Detail	ail Classic				
Name	Account	User	Туре	Position	BillCode
🗌 Goodman, Sarah	Acme Company	Smith,Mark		Standard Employee	Blue Account

				Help	Support   Admin   Accou	int Dashboard   Logout
Scerling	SCREENING ASSESSMENTS DRUG TOOLS PO	STHIRE DOCUMENTS REPORTS ANALYTICS				
	Screening»Order Editor»					Mark @ Acme Company
Screening Order Editor Goodman, Sarah Edit	Order Info Add Alias					
554/ / Pin Number 92/41/25 OrderDit 1010177 Order Oreated 9/28/222 Order Submitted 9/28/222 Order Medified 9/28/222	0	DOB 1/1/1980 Pesitien Standard Employee BillCede Bile Account Cemplianee WA (Integration_Disposition) Salary Over 375,000		Driver Lie - Result Level3 Status AdverseAction Email Address SBCTWDemo+Demo123@ Oharge Type Invoice Account		
Authorization Choose F	le No file chosen	Upload (lift, pdt, png & jpg only)				
Attachments	Action					
Filename	Reference			Posted	User	
Release Form.pdf				1/5/2023 6:52:00 PM ET	Demo Hub	
Passport.pdf	Comprehensive Criminal for Global Screening - Goodman, Sarah			1/0/2023 4:55:00 PM ET	System	
State Specific Form.pdf	County Criminal Record - WA-KING			1/5/2023 6:57:00 PM ET	Demo Hub	
Summary New Detail New Summary Classic Deta	al Classic					
Search		Notes	Ordered	Done/ETA ?	Status	Result
SSN Trace 921-41-2350			9/28/2022 11:43 AM ET	9/28/2022	Complete	Complete
County Criminal Record Goodman, Sarah WA-KING			9/28/2022 11:43 AM ET	9/28/2022	Complete	Consider
Comprehensive Criminal for Global Screening Goodman, Sarah United Kingdom - DBS Basic - Client Evidence of Identity			9/28/2022 12:05 PM ET	9/28/2022	Complete	Clear

### **Order Manager Tabs**

Across the top left of the Order Manager, you will find a series of tabs labelled Overview, Searches, Attachments, and Activity Log.

s	cerling	3	Entire Organization 👻	Goodman, Sarah #1801811756 7	Order Status: Order Result: Complete Oconsider	×
Q	uick Search	٩	3 3 1 4	Overview Searches Attachments Activity Log		<
G	) Start Order		atarteu in Flogress Action reedeu neady ior renew	Order Summary	Candidate Information	0
	Orders	^	D Candidate Status / Result	Order Started Order Completed 2022-09-28 2022-09-28	First Name Address Sarah 123 First Ave Seattle, WA 98116	
	Dashboard		1493496 Smith, Pete     Invite Sent	Account Name Add Ons ACME COMPANY —	Middle Name — Email SarahGoodman@sterlingcheck.co	
	Advanced Search Recently Viewed		🗌 1801811756 Goodman, Sarah 🕒 Consider	PositionBill Code	Last Name m Goodman Phone DOB Phone	€
	Historical Records		1801804133 Peterson, Melissa Y.     Orafted Or	ler Package Blue Account Standard Criminal Account Location	1980-01-01 — SSN Location of Employment	
	Reporting	~	1801796343 Martens, Terri I.     Action Nee	Jed BELLEVUE,, WA		
Ð	] Platforms	~	1801795950 Durbin, Scott A. Clear			

### **Overview**

When the Order Manager is opened, you will land on the Overview tab by default. This tab will provide you a full summary of everything associated with the selected order.

PLEASE NOTE You can opt to configure your Sterling account so that when Order Manager opens, you land on the Searches tab instead of the Overview tab.

Order Summary: This section will display a concise summary of the order's basic details, such as package, bill code, custom fields, etc.

#### Candidate Information:

This section will display the selected candidate's personal identifiable information (PII), contact details, and location of employment.

oodman, Sarah #180181	1756			Order Status: Complete	Order Result
Coodman, Sarah #1801811756     Order Status: Complete     Order Measure Consider       Overview     Searches     Attachments     Activity Log       Scenting       Order Started     Order Completed       2022-09-28     2023-01-09       Activity Barred     Order Completed       2022-09-28     2023-01-09       Activity Barred     Order Completed       2022-09-28     2023-01-09       Activity Barred     Address       Position     Bil Code       Position     Bil Code       Standard Criminal     Bill Code       Standard Criminal     BELLEVUE, WA         Drivers Record     Goodman, Sarah, WAW-10000009       Ready 5 Status     Price       Status     Price       Status     Price       Status     Price       Drivers Record     Goodman, Sarah, WAW-10000009       Ready to Submit     \$18.25       By clicking Submit, I certify that I have provided the individual's dickoure and received the individual's written auto-triation for the report and make the other completer and received when individual's written auto-triation for the report and make the other completer and completer and received when individual's written auto-triation for the report and make the other completer and completer and received when individual's written auto-triation for the report and make the other completered tha soften and received when individual's written auto-triatio					
odman, Sarah #1801811756       erview     Searches     Attachments     Activity Log       Cerling     Order Completed     2023-01-09       Drder Started     Order Completed     2023-01-09       ccount Name     Add Ons					
Order Summary <sup>Drder Started</sup> 2022-09-28	Order Completed 2023-01-09	Candie First Name Sarah	date Informat	Address 123 First Ave	
ccount Name CCME COMPANY osition – ackage tandard Criminal	Add Ons — Bill Code Blue Account Account Location BELLEVUE,, WA	Middle Nam Last Name Goodman D08 1980-01-0 Drivers Lice W-123345	ne 1 nse Number 16789	Seattle, WA 98 Email SBCTWDemo+ Com Phone — Location of Emp Seattle, WA, U Salary Over \$75,000	116 Demo123@gmail. loyment S
Drafted Searches Searches	Identifier		Status	Price	^
Drivers Record	Goodman, Sarah, WA-W- 1X	00000009	Ready to Submit	\$18.25	
By clicking Submit, I certify that I have certifications as follows: I am request conspicuous disclosure in a documen Submitted Searches	provided the individual a disclosure and ng this background check for an employn c consisting solely of the disclosure that a	received the individ nent purpose as def consumer report m	lual's written authorizati ined in the FCRA; that th ay be requested and the	on for the report and e applicant has receiv e applicant has autho	make the other ved a clear and rized ir ④ See More Submit
Searches	ldentifier	Ordered	Complete	Status	ETA / Result
SSN Trace	921-41-2350	2022-09-28	2022-09-28	Complete	COMPLETE
County Criminal Record	Goodman, Sarah, WA-KING	2022-09-28	2022-09-28	Complete	CONSIDER



**Drafted Searches:** This section will display any searches associated with the order that have not yet been submitted to Sterling for fulfillment.

Once a search is in Ready to Submit status, you will see the client certification text appear along with a Submit button. The client certification language is dynamic based on your company location and can be viewed and expanded at any time by selecting the See More icon. Selecting Submit will send any drafted search that are in Ready to Submit to Sterling for fulfillment, and this search will move into the Submitted Searches section.

#### PLEASE NOTE

Client Hub does not yet support all services being submitted for fulfillment. If an order contains one or more services that are not able to be submitted directly through Client Hub, you will see a View Classic button instead of the standard Submit option. By selecting View Classic, you will be redirected to the classic ScreeningDirect Order Editor page to submit these services for fulfillment.

**Submitted Searches:** This section will display any searches associated with the order that have been submitted to Sterling for fulfillment. If you select an individual search within this section, you will be taken to the Searches tab so that you can review the details and/or results of the selected search.

### **Searches**

Clicking on the Searches tab will allow you to see and/or action any service(s) that have been submitted for the candidate. The specific details and actions available within this tab will vary depending on your account configuration, order status, and organization's access policies. Sterling categorizes searches results by color to help make it easy to see and navigate search results.

Si	erling	<	E	ntire Organization 👻			Goodman, Sa	arah #1801811756 🖸		( (	Order Status: C <b>omplete</b>	Order Result: Consider	×
	ick Search	٩	3 3 1 4		Overview S	Gearches Attachments Activity Log							
Start Order			Started In Progr	ess Action Needed Rea	Completed ady for Review	✓ Important	Disclosures						
_													Ð
	Orders	^		D D	Candidate	Status / Result	✓ SSN Trace	-XXX-XX-2350				COMPLETE	
	Dashboard			1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>							-
	Advanced Search			-			<ul> <li>County Court Search—Goodman, Sarah, WA-KING</li> </ul>					CONSIDER	
	Recently Viewed			1801811756	Goodman, Sarah	<ul> <li>Consider</li> </ul>	Data As Provided	I	Verified Data				€
	Historical Records			1801804133	Peterson, Melissa Y.	<ul> <li>Drafted Order</li> </ul>	Last Name	Goodman	Report requested	on: 2022-09-28 Report compl	eted on: 2022-09-2	28	
	Reporting	~		1801796343	Martens, Terri I.	Action Needed	First Name	Sarah	Case Number	123456			
Ð	Platforms	~		1801795950	Durbin, Scott A.	Clear	Pin Number DOB	Not Provided XXX-XX-2350 XXXX-01-01	File Date Court Verified By	2011-01-01 King Name, DOB, SSN			
										· · · · · · · · · · · · · · · · · · ·			

#### **Color Legend:**

Gray: Pending searches and non-search components, such as Important Disclosures.

Blue: Searches with a status of Clear, Complete, Hold, Level 1, Clear, and Pass

Orange: Searches with Level 2, Level 3, Consider, Review, and Unperformable

Throughout the Searches tab, you will see that certain sections can be collapsed and expanded. You can expand any item/section that is collapsed by default at any time by clicking on it.

- Collapsed by default: Searches that are pending and searches that have a result of Clear, Complete, Hold, Level 1, and Pass will be collapsed by default. Important Disclosures, Required Notices, Report Comments, and non-search components will also be collapsed by default.
  - If a pending search has fulfillment notes included, then that section will be expanded by default so that you can easily review those notes.

• **Expanded by default:** Searches that have a result of Level 2, Level 3, Consider, Review, or Unperformable will be expanded by default, to help draw your attention where it is most needed.

Within the details of a specific Sterling service, you may also see associated fulfillment notes and/or attachments. Except with specific services where they are required, these notes and attachments do not appear in the final report that you are able to print nor do they appear in the report that is sent to the candidate.

- Fulfillment notes: Fulfillment notes are status notes associated with a specific service. Examples include ETA updates, Education and Employment Verification attempts, and Drug & Health Services updates (U.S. clients.)
- Fulfillment attachments: Fulfillment attachments are files that are associated with a specific service. Examples include supporting documents for Education and Employment verifications and Drug & Health Services files (U.S. clients.)

Sterling	E	ntire O	rganization 👻			Goodman, S	arah #1801811756 [2]				Order Status: Complete	Order Result: Consider	×
Ouick Search Q	-	2	4	2	4	Overview S	Searches Attachments Activ	vity Log					
		ی Starte	d In Progress	Action Needed R	Completed Leady for Review	This is an interactive view of the candidate results, not the final report. Access the final report by clicking Export in the right side navigation.							
G Start Order													Ð
Crders ^			ID	Candidate	Status / Result	∧ County Co	ourt Search—Goodman, Sarah, WA-KING	3				CONSIDER	
Dashboard			1499256	Goodman, Sarah	😑 Invite Data Mismatch	Data As Provided		Verified Data					
Advanced Search						Last Name	Goodman		Report requested	on: 2022-09-28 Report of	ompleted on: 2022-09-28		
Recently Viewed			1801915386	Goodman, Sarah M.	Pending	First Name Sarah		Case Number 123456				€	
Historical Records		1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>	Middle Name Not Provided			File Date 2011-01-01					
						Pin Number	XXX-XX-2350		Court	King			
🖬 Reporting 🗸 🗸			1801811756	Goodman, Sarah	😑 Consider	DOB	XXXX-01-01		Verified By	Name, DOB, SSN			
∋ Platforms ✓			1801804133	Peterson, Melissa Y.	Drafted Order	Gender	Unknown		First Name	Sarah			
			1801796343	Martens, Terri I.	Action Needed	Jurisdiction	WA-KING (3058)		Pin Number DOB	XXX-XX-2350 1980-01-01			
			1801795950	Durbin, Scott A.	Clear	File Name			Date				
			1801769978	Smith, Cole D.	Pending	State Specif	ic Form.pdf		2023-01	-05 6:57 PM EST			
			1801769572	Jones, Jessica J.	😑 Consider								
			1801757095	11757095 Thompson, Bekcy J. Clear	Clear	<ul> <li>Fulfillme</li> <li>2023-01-09</li> </ul>	nt Notes						
			1801685863	Jones, James D.	<ul> <li>Adverse Action Sent</li> </ul>	2023-01-09 This is a sample fulfillment note.							

### **Attachments**

Clicking on the Attachments tab will give you access to applicable files associated with the order. This includes files uploaded by you, the candidate, supporting search/fulfillment documents, and service specific files.

You will also be able to upload a variety of file types in this section and attach any uploaded file(s) to a specific search by clicking the Attach button.

Goodma	an, Sarah #180181175	6 🛛		Order Status: Complete	Order Result: Consider ×
Overview	v Searches Attach	ments Activity Log			
					P07
Add A	Attachment			All field	s required
		🚹 Drag file here	or click to browse		
Select	t Attachment Type		Select Associated Search for Attach	ment	
Sciect	er talen in ene rype	Ŧ	Sciece Abbolated Scaren for Attach		• €
				Attac	h
	File Type	Associated Search	Date		User
	State Specific Form.pdf	County Criminal Record - WA-KING	2023-01-05 6:57	7 PM EST	Demo Hub
	Passport.pdf	Comprehensive Criminal for Globa Goodman, Sarah	al Screening - 2023-01-05 6:52	2 PM EST	Demo Hub
	Release Form.pdf		2023-01-05 6:52	2 PM EST	Demo Hub



Files uploaded to the Order Manager Attachments tab are not visible to the candidate. PLEASE NOTE These files will only be visible to those users within your organization who have been granted permission. Files must be 10MB or smaller for upload.

You can also download a single file or multiple files at one time in this section.

	Goodn	nan, Sarah #18018	311756 🛛		Order Status: Complete	Order Result: Consider	×
	Overvie	ew Searches A	Attachments Activity Log				
	Adc	Attachment			All	fields required	9
To download a single file			🔥 Drag file her	e or click to browse			9
simply tap on the File Name.	Sele	ect Attachment Type	•	Select Associated Search for Attac	chment	-	₽
To download multiple					A	ttach	
documents at one time, select the checkboxes of the	2 sele	ected			Download	Clear All	
documents you wish to		File Type	Associated Search	Date		User	
select Download. A zip file will		State Specific Form.pdf	County Criminal Record - WA-KIN	IG 2023-01-05 6	:57 PM EST	Demo Hub	
be created with all the		Passport.pdf	Comprehensive Criminal for Glol Goodman, Sarah	bal Screening - 2023-01-05 6	:52 PM EST	Demo Hub	
selected files.		Release Form.pdf		2023-01-05 6	:52 PM EST	Demo Hub	

The zip file will be found in your device downloads folder and will contain the naming format of Candidate First Name\_Candidate Last Name\_Order ID

🕌    🛃 📕 🖛	Extract	t Sara	rah_Goodman_1801811756				_		×
File Home Share View	Compressed Fold	lder Tools							^ ?
← → × ↑ 🔋 « Downloads >	Sarah_Goodman_1	1801811756	~	5					
🖌 Quick access	^	Name				Туре	Compressed	size	
		👌 Passport				Adobe Acrobat Document			33 KB
	<b>.</b>	🛃 Release For	m			Adobe Acrobat Document			33 KB
Downloads	*								
📄 Documents	*								

### **Activity Log**

Clicking on the Activity Log tab will allow you to review a comprehensive log of events that have occurred as part of the order. These events include status changes, result changes, and/or other actions taken against the order. Each event that is logged includes a date/time stamp of when the event occurred, as well as the user or system that performed the action.

PLEASE NOTE

The Activity Log will display all dates within the universal date format of YYYY-MM-DD. Time stamps by default will be displayed in Eastern Time. You have the option to set the desired time zone you wish to see time stamps displayed in.

G	oodman	, Sarah #180	1811756 🛛				Order Status: Complete	Order Result: Consider	×
0	verview	Searches	Attachments	Activity Log					=
									PDF
	Date		User		ļ	Activity			œ
	2022-09-	28 12:02 PM EDT	System		(	Order status changed to Complete			Ę
	2022-09-2	28 12:02 PM EDT	System		(	Order result changed to Consider			
	2022-09-	28 11:43 AM EDT	Demo H	lub	(	Order status changed to Pending			
						Rows per page 1	0 🔻 1-7 of 7	< >	킨

The following events are logged within the Activity Log:

- Order Status Change
- Order Result Change
- Client Status Change
- Client Comments (internal only)
  - CMA Comments
  - o Client Status Comments
  - o Report Comments
- Adverse Action (US Specific)
  - Initiated Adverse Action
  - Pause/Cancel/Resume Adverse Action
  - Candidate related Adverse Action
- Fair Chance (US Specific)
  - o Initiated Fair Chance
  - Candidate related Fair Chance
- Individualized Assessment (US Specific)
  - o Initiated Individualized Assessment
  - o Candidate related Individualized Assessment
- Drug & Health Services (US Specific)
  - Registration Modifications
- Candidate Action
  - o Viewed Completed Report in Candidate Hub
  - o Viewed Workflow document in Candidate Hub
  - o Viewed Signed Consent in Candidate Hub



### **Right Navigation Options**

Along the right side of the Order Manager, you will see a navigation bar. This navigation bar will be collapsed by default and show only icons while collapsed. You can expand the navigation bar by selecting the orange Expand icon at any time.

As you scroll through the Order Manager for a candidate, the navigation bar will remain at the top of the righthand side, allowing you to take action anywhere within the Order Manager.

Goodman, Sarah #180	1811756 🖸		Order Status: <b>Complete</b>	Order Result: Consider		
Overview Searches	Attachments Act	ivity Log				
Order Summary Order Started 2022-09-28 Account Name	Order Completed 2022-09-28 Add Ons	Candida First Name Sarah Middle Name	te Information Address 123 First Ave Seattle, WA 98116 Email	(C)		
ACME COMPANY	-	Goodman, Sarah #1801	811756 🖸		Order Status: Complete	Consider ×
Package Standard Criminal	Bill Code Blue Account Account Location	Overview Searches	Attachments Activity Log		Client Matrix	
	BELLEVUE,, WA	Order Summary Order Started	Order Completed	Candidate Inform First Name	Copy Link	
		- 2022-09-28	2022-09-28	- Middle Name	Report Comments	
		ACME COMPANY Position	100.013	— Last Name	• Archive	
			Bill Code Blue Account	DOB 1980-01-01	➔ View Classic	
			Account Location BELLEVUE,, WA		-	

Client Matrix: The Client Matrix selection will display different options depending on your account configuration.

 Change Result: If your account is configured for Sterling's Client Matrix Application (CMA), selecting Change Result will allow you to change the order level result based on your pre-established CMA settings.

**Export:** Selecting Export allows you to export a copy of the official Consumer Report as a PDF document. This export ability is only available on completed reports.

**Copy Link:** Selecting Copy Link allows you to copy a deep link of the Consumer Report that can be shared with other users in your organization.

**Report Comments:** Selecting Report Comments allows you to enter internal comments that appear within the Order Manager for other users. These comments **do not** appear on the candidate copy of the Consumer Report.

Archive: Selecting Archive allows you to move the order into an Archive state.

View Classic: Selecting View Classic will redirect you over to the classic ScreeningDirect order editor page.

### **Client Configurable Features**

#### Data & Identity

If you utilize Sterling's Identity Verification service, and/or have an Applicant Tracking System integration , you will see a Data & Identity tab next to the Overview tab. Clicking on the Data & Identity tab will display the results from the candidate's Identity search, and/or a comparison of the candidate data collected within your Applicant Tracking System and the data that the candidate entered in Sterling's Candidate Hub.

If there is a failed ID verification or a mismatch found in the data submitted by the candidate, an Alert icon will appear to indicate that there is a discrepancy for you to review. These orders can be found under the Action Needed tile at the top of the Order Grid, in Invite Data Mismatch status.

**Identity Verification:** If you are utilizing Sterling's Identity Verification service, the results will be found under the Data & Identity tab. This functionality is currently US-only but is being expanded to additional regions soon.

Sterling o	Entire Organization 👻		Goodman, Sarah #149925	i6 🖸		Order Status: Invite Ready
Ouick Search O			Overview Data & Ident	tity		
quinti Scarta	3 4 Started In Progres	Action Needed Ready for Review	Data Mismatch			Ø
Start Order				Invite Data	Candidate Data	Ð
Manual Order		Candidate Status / Result	First Name Last Name	Sarah Goodman	JACK FROST	
	1499256	Goodman, Sarah 🥚 Invite Data Mis	smatch			
Dashbaard	1801915386	Goodman, Sarah M. 🕒 Pending				
Advanced Search	1493496	Smith, Pete Invite Sent				
Recently Viewed	1801811756	Goodman, Sarah 😑 Consider				
Historical Records	1801804133	Peterson, Melissa Y.				

**Data Comparison:** If your account is configured with an Application Tracking System integration with Sterling, any order placed through your integration will include Data Comparison. This feature allows you to see a side-by-side comparison of the data sent from your integration to Sterling and the data submitted by the candidate as part of the invite workflow.

Scerling	Entire Organization 👻			Goodman, Sarah Marie #1801	915386 🖸		Order Status Pending	ğ ×
Ouick Search Q		1	4	Overview Searches IDat	a & Identity Attachments Activit	y Log		G
Start Order	Started In Progre	Action Needed Re	Completed eady for Review	Data Comparison			Show only discrepancies	
		Candidate	Status / Result		Integration Data	Candidate Data		€
				Personal Info			3 Discrepancies 🔨	1
Dashboard	1801915386	Goodman, Sarah M	Peoding	First Name	Sara	Sarah		
A diamond Oceanth			•	Middle Name	_	Marie		1
Advanced Search	1493496	Smith. Pete	Invite Sent	Last Name	Goodman	Goodman		
Recently Viewed			•	Suffix	-	-		
Historical Records	1801811756	Goodman, Sarah	Consider	DOB	1969-12-31	1980-02-01		1
Thatorical Records			•	SSN	444234568	444234568		
🖬 Reporting 🗸 🗸	1801804133	Peterson, Melissa Y.	<ul> <li>Drafted Order</li> </ul>		Integration Data	Candidate Data		l l
				Current Address			1 Discrepancy 🔨	
	1801/96343	Martens, Terri I.	Action Needed	Street	123 First Ave	123 First Ave		
	- 4004205050	D 11 C 11		City	Seattle	Seattle		1
	1801/95950	Durbin, Scott A.	Clear	State	WA	WA		
	1001700070	Courte Colo D	<ul> <li>Desides</li> </ul>	Zip Code	98116	98116		1
	1901/099/0	smith, cole D.	Pending	Country	United States	United States		
	1801769572	1901769572 Joner Jacoba Consider		Start Date	1985-01-01	1980-02-01		
	L 1801709572	1801769572 Jones, Jessica J. 💗 Consider	- consider	End Date	-	-		
	1801757095	Thompson, Bekcy J.	Clear					

The following data points are compared within Data Comparison:

- Name (First, Middle, and Last)
- Address History
- PII (Social Security Number, Date of Birth)

- Employment History
- Education
- Self-Disclosed information

Discrepancies will be highlighted in yellow so that you can easily see where data differed. You can also select Show Only Discrepancies to filter to on those mismatches.

Scerling	Scerling Buttire Organization				Goodman, Sarah Marie #1801915386	ß	c	rder Status: Pending ×
Quick Search Q		2 2	1	4	Overview Searches 🛛 Data & Identi	ity Attachments Activity Log		9
		Started In Progre	ss Action Needed F	Completed Ready for Review	Data Comparison		Show only disc	repancies
<ul> <li>Start Order</li> </ul>	der					Integration Data	Candidate Data	Ð
Corders •		DID	Candidate	Status / Result	Personal Info		3 Discrepano	sies ^
Dashboard	hboard 1801915386 Goodman, Sarah M.		Pending	First Name	Sara	Sarah		
Advanced Search		1493496	Smith. Pete	Invite Sent	DOB Middle Name	1969-12-31	Marie 1980-02-01	
Recently Viewed				•		Integration Data	Candidate Data	
Historical Records		1801811756	Goodman, Sarah	Consider	Current Address		1 Discrepa	ncy 🔨
🖬 Reporting 🗸 🗸		1801804133	Peterson, Melissa Y.	Drafted Order	Street	123 First Ave	123 First Ave	
관 Platforms ~		1801796343	Martens, Terri I.	Action Needed	Start Date	1985-01-01	1980-02-01	

### **Client Status**

If you utilize Sterling's Client Status (formally Dispositions) functionality, the assigned Client Status will be displayed both in the Order Manager as well as within the main Order Grid. Within the Order Manager, you will be able to see and manage the assigned status in the Searches tab.

Si	Cerling			Goodman, Sarah #1801811756 🖸 Order Satus: Order Resu Complete Conside	er ×		
Qu	iick Search	Q	2	4 2	4 16	Overview Searches Attachments Activity Log	
	04+ 0		Started		Ready for Review Adverse Action Process	This is an interactive view of the candidate results, not the final report. Access the final report by clicking Export in the right side navigation.	
	Start Order			Creditate	Status / Basuit	Client Status: None /	Ð
	Orders			Calibidate	Status / Result		Ę
	Dashboard		1499256	Goodman, Sarah	😑 Invite Data Mismatch	<ul> <li>Important Disclosures</li> </ul>	
	Advanced Search		-				
	Recently Viewed		180191538	16 Goodman, Sarah N	. 😑 Pending	SSN Trace—XXX-XX-2350 COMPLETE	€
	Historical Records		1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>	County Court Search—Goodman, Sarah, WA-KING     CONSIDER	
	Reporting		180181175	i6 Goodman, Sarah	Consider	Data As Provided Verified Data	
€	Platforms		180180413	13 Peterson, Melissa Y	Drafted Order	Last Name Goodman Report requested on: 2022-09-28 Report completed on: 2022-09-28	
			180179634	13 Martens, Terri I.	Action Needed	First Name         Sarah         Case Number         123456           Middle Name         Not Provided         File Date         2011-01	

There are two ways that a Client Status can be assigned or changed on an order within the Order Manager.

**Client Status Change Only:** On the top left of the Searches tab, you will see Client Status. By selecting the pencil icon, you can change the Client Status value associated with the order without having to change the order result. You will also have the option to enter notes to associate with the order. Notes entered are internal only and will not appear on the Consumer Report that is sent to the candidate.

	Advanced Search Recently Viewed			1801915386	Goodman, Sarah M.	Pendin	8	v In	nportant Discle	osures					•
				1493496	Smith, Pete	Ch	ange Clien	t Status	5				cc	MPLETE	
		~	I	1801811756	Goodman, Sarah	Cli	ent Status								
Ð		~		1801804133	Peterson, Melissa Y.		ene stotas				v			JNSIDER	
				1801796343	Martens, Terri I.	En				Verified Data Report requested	on: 2022-09-28 Report completed on: 2022-09-28				
				1801795950	Durbin, Scott A.							Case Number	123456		
				1801769978	Smith, Cole D.	-				Cancel	Change Status	File Date Court Verified By	2011-01-01 King Name, DOB, SSN		



**Client Status & CMA Change:** If you wish to change both the Client Status and the Order Result for a CMA score, then you will want to select the <u>Client Matrix icon</u> in the right-side navigation. This will allow you to make both changes are one time, as well enter optional notes to associate with the order. Notes entered are internal only and will not appear on the Consumer Report that is sent to the candidate.

s	cerling	3	Entire Organization 👻			Goodman, Sarah #1801	311756 🖸		Order Status: Complete	Order Result: Consider	×
G	uick Search	۹	3 4	2	4	Overview Searches	Attachments Activity Log		E Client Matrix		8
6	Start Order		Started In Progre	ess Action Needed Re	completed	Order Summary		Candidate I	Select Result	-	
	Orders	^	0	Candidate	Status / Result	Order Started 2022-09-28	Order Completed 2022-09-28	First Name Sarah	Select Client Status	-	
	Dashboard		1499256	Goodman, Sarah	😑 Invite Data Mismatch	Account Name ACME COMPANY	Add Ons —	Middle Name	Enter comments (optional)		8
	Recently Viewed		1801915386	Goodman, Sarah M.	Pending	Position	Bill Code	Goodman			30
	Historical Records		1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>	Package Standard Criminal	Blue Account Account Location	1980-01-01 SSN	Cancel Change Result		
02	Reporting	~	1801811756	Goodman, Sarah	Consider	-	BELLEVUE., WA	-	Salary Over \$75,000		
Ð	Platforms	~	1801804133	Peterson, Melissa Y.	<ul> <li>Drafted Order</li> </ul>						

All events associated with Client Status can be found within the Activity Log and include a date/time stamp, user who did the event, and the event itself.

s	cerling	3	Entire Organization 👻			Goodman, Sarah #18018117	56 🖸	Orde Cor	r Status: nplete	Order Result: Consider	×
Q			3 1	2	4	Overview Searches Attach	nments Activity Log				
Ð	Start Order		Started In Progress	Action Needed R	eady for Review	Date	User	Activity			
:	Orders ^	_	ai 🗆	Candidate	Status / Result	2023-01-09 4:25 PM EST	Demo Hub	Client Status changed sample comment			
	Dashboard		1499256	Goodman, Sarah	😑 Invite Data Mismatch	2023-01-09 4:25 PM EST	Demo Hub	Client Status changed to Review with Manage	er -		
	Advanced Search		1801915386	Goodman, Sarah M.	Pending	2023-01-09 4:24 PM EST	Demo Hub	Client Status changed to Under Review			Ð
	Historical Records		1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>	2022-09-28 11:43 AM EDT	Demo Hub	Order status changed to Pending			
	Reporting ~		1801811756	Goodman, Sarah	e Consider			Rows per page 10 👻	1-10 of 10	$\langle \rangle$	

### **U.S. Specific Features**

Initiate Pre-Adverse Action, Fair Chance, and/or Individualized Assessment: If you utilize Sterling's technologyenabled Compliance tools, selecting the Initiate Pre-Adverse Action button will direct you to the Pre-Adverse Action launch form.

St	erlina	3	Entire Or	rganization 👻			Goodman, S	arah #1801811756 🖸				Order Status: Complete	Order Result: Consider	×
Quid	:k Search	٩	3	4	2	1 16	Overview S	Searches Attachments	Activity Log					
Ð	Start Order		Started	d In Progress	Action Needed	Ready for Review Adverse Action Process	This is an interacti Access the final re	ve view of the candidate results, not t port by clicking <b>Export</b> in the right sid	the final report. de navigation.			Initiate Pre-Ad	verse Action	
	Orders	^		ID	Candidate	Status / Result	Client Status: Re	view with Manager 🖌						
	Dashboard			1499256	Goodman, Sarah	😑 Invite Data Mismatch	✓ Important	Disclosures						
	Advanced Search			4004045205	6 I 6 IN	<b>.</b>	0011 7						001101575	
	Recently Viewed			1801915380	Goodman, Sarah M.	Pending	✓ SSN Trace						COMPLETE	€
	Historical Records			1493496	Smith, Pete	<ul> <li>Invite Sent</li> </ul>	<ul> <li>County Co</li> </ul>	ourt Search—Goodman, Sarah, V	WA-KING				CONSIDER	
1.	Reporting	~		1801811756	Goodman, Sarah	Consider	Data As Provided			Verified Data				
Ð	Platforms	~		1801804133	Peterson, Melissa Y.	<ul> <li>Drafted Order</li> </ul>	Last Name	Goodman		Report requested of	on: 2022-09-28 Report	completed on: 2022-09-2	28	
				1801796343	Martens, Terri I.	Action Needed	First Name Middle Name	Sarah Not Provided		Case Number File Date	123456 2011-01-01			
				1801795950	Durbin, Scott A.	Clear	Pin Number DOB	XXX-XX-2350 XXXX-01-01		Court Verified By	King Name, DOB, SSN			
				1801769978	Smith, Cole D.	Pending	Race	Unknown		Last Name	Goodman			
				1801769572	Jones, Jessica J.	<ul> <li>Adverse Action Sent</li> </ul>	Gender	Unknown WA-KING (3058)		First Name Pin Number DOB	Sarah XXX-XX-2350 1980-01-01			

Within the Pre-Adverse Action launch form, you will be prompted to confirm candidate data, confirm candidate location of residence (current address), select reason for potential disqualification, enter Location of Employment, include optional comments, and confirm signature.

For reports that are in a Pre-Adverse Action status, you will have the ability to Pause, Cancel, and Resume the Adverse Action process:

- **Cancel Adverse Action:** Selecting Cancel Adverse Action will cancel the final Adverse Action letter from being sent to the candidate.
- Pause Adverse Action: Selecting Pause Adverse Action will put the report into an Adverse Action Paused status. The final Adverse letter will not be sent to the candidate until the process has been resumed. Orders will not automatically resume you will need to resume or cancel the final Adverse Action.

s	cerling	3	E	intire Organiz	zation 👻				Goodman, Sarah #1801811756 🖸	Order Status: Order Resul Pre-Adverse Action Initiated e Level	т з Х
Q	uick Search	٩		3	4	2	4	16	Overview Searches Attachments Activity Log		
•	Start Order			Started	In Progress	Action Needed	Ready for Review	Adverse Action Process	This is an interactive view of the candidate results, not the final report. Access the final report by clicking <b>Export</b> in the right side navigation.	Cancel Adverse Action Pause Adverse Action	•
	Orders	^		D ID		Candidate	Status / Re	esult	Client Status: Review with Manager 🖋		- - -
	Dashboard			14992	256	Goodman, Sarah	😑 Invite D	Data Mismatch	<ul> <li>Important Disclosures</li> </ul>		
	Advanced Search Recently Viewed			18019	915386	Goodman, Sarah M.	🔵 Pendin	g	<ul> <li>SSN Trace=XXX-XX-2350</li> </ul>	COMPLETE	
	Historical Records			14934	496	Smith, Pete	Invite S	ient	<ul> <li>County Court Search—Goodman, Sarah, WA-KING</li> </ul>	CONSIDER	
	Reporting	~		18018	311756	Goodman, Sarah	😑 Consid	er	Data As Provided Verifie	ed Data	1
Э	Platforms	~		18018	304133	Peterson, Melissa Y.	Drafted	d Order	Last Name Goodman Report	t requested on: 2022-09-28 Report completed on: 2022-09-28	

• **Resume Adverse Action:** Selecting the Resume Adverse Action will resume the process and queue the final Adverse Action letter to be sent out at the appropriate time. The system will ensure that the duration between pre and final Adverse Action has been met before the final Adverse Action is sent.

Si	cerling	4	E	Entire Orga	nization 👻				Goodman, Sarah #1801811756 🖸	Order Status: Order Result Adverse Action Paused e Level:	×
	ick Search	٩		3	4	2	3	17	Overview Searches Attachments Activity Log		
Ð	Start Order			Started	In Progress	Action Needed	Ready for Review	Adverse Action Process	This is an interactive view of the candidate results, not the final report. Access the final report by clicking Export in the right side navigation.	Cancel Adverse Action Resume Adverse Action	G
:	Orders	^		0		Candidate	Status / R	esult	Client Status: Review with Manager 🖉		E
	Dashboard			14	99256	Goodman, Sarah	😑 Invite I	Data Mismatch	<ul> <li>Important Disclosures</li> </ul>		
	Advanced Search			18	01915386	Goodman, Sarah M.	Pendir	18	✓ SSN Trace−XXX-XX-2350	COMPLETE	
	Historical Records			14	93496	Smith, Pete	Invite	Sent	<ul> <li>County Court Search—Goodman, Sarah, WA-KING</li> </ul>	CONSIDER	
16	Reporting	~		18	01811756	Goodman, Sarah	Pre-Ad	lverse Action Sent	Data As Provided	Verified Data	
Ð	Platforms	~		18	01804133	Peterson, Melissa Y.	Drafte	d Order	Last Name Goodman	Report requested on: 2022-09-28 Report completed on: 2022-09-28	

#### PLEASE NOTE

Please refer to our Adverse Action, Fair Chance, and Individualized Assessment User Guides for more details. <u>Adverse Action User Guide | Individualized Assessment User</u> <u>Guide | Fair Chance User Guide</u>

Printed Consumer Report: For clients whose orders include Department of Transportation (DOT) Employment Verification services, fulfillment notes will be displayed in the final Consumer Report. This includes client printed copies as well as copies received by the candidate.

Provided Da	ta	Verified Data					
Name	Sarah Goodman	Report requested on: 2023-05-02 Report completed on: 2023-05-02					
Start Date	2022-01-01	Employer Name	ABC Trucking				
End Date	Not Provided	Start Date	2022-01-01				
Position	Driver	End Date	not applicable				
Type of	Not Provided	Position	Driver				
-mpioyment		Type of Employment	not applicable				
		Employer Name	ABC Trucking				
		Type of Employment	not applicable				
		Start Date	2022-01-01				
		End Date	Not Provided				
		Position	Driver				
		Current Employer	Yes				
		Is subject eligible for rehire	N/A				
		What were the subject's reasons for leaving	not applicable				
		Comments	Result Comments: The completed DOT forms have been provided to Client on 05/02/2023, as verified by the entity. Result Message: The completed DOT forms have been provided on 05/02/2023, as verified by the entity.				
Fulfillment N	lotes						
2023-05-02	2 Inbound Fax Entity	Inbound Fax Entity Jane Anderson DER Result Provided					
2023-05-02	2 Inbound Call[Entity	Inbound Call[Entity]Jane Anderson]DER[Status Update Provided. Confirming fax was received					
2023-05-02	2 Outbound Fax Enti	ty Jane Anderson  DER Contact	Attempt				
	The Work Number	integration initiated					



Form I-9 & Onboarding: If you utilize Sterling's Form I-9 and/or Onboarding services, you will be able to initiate these workflows from the Order Manager right navigation.

- Manage I-9: Selecting Manage I-9 will allow you to seamlessly transition to our Sterling I-9 interface and manage Form I-9 related tasks for the candidate.
- **Manage Onboarding:** Selecting Manage Onboarding will allow you to seamlessly transition to the Sterling Onboarding interface and manage Onboarding tasks for the candidate.

Goodman, Sarah #180	1811756 🛛		Order Status: <b>Complete</b>	Order Result: Consider		
Overview Searches	Attachments Activi	ty Log				
Order Summary Order Started 2022-09-28 Account Name	Order Completed 2022-09-28 Add Ons	Candidate Inform First Name Sarah Middle Name —	Address 123 First Ave Seattle, WA 98116 Email	1-9		
ACME COMPANY	—	Goodman, Sarah #1801811756	ß		Order Status: Complete	Order Result: ×
Package Standard Criminal	Bill Code Blue Account Account Location	Overview Searches Attachm	ents Activity Log		Client Matrix	
	BELLEVUE,, WA	Order Summary	r Completed	Candidate Inform	Manage Onboarding	
		Account Name Add	-09-28	Middle Name	Export	
		ACME COMPANY —		Last Name	🕒 Copy Link	
		Bill C Package	ode	DOB	Report Comments	
		Standard Criminal Acco	Account unt Location	SSN	Archive	
		BELL	EVUE,, WA		• View Classic	

PLEASE NOTE Please refer to our <u>Sterling I-9 User Guide</u> for more details.

**Drug & Health Registration Management:** When Drug & Health Screening services are included in an order, you can cancel the registration or extend its expiration directly from the left navigation using the Registration Management tools. Registration modifications are recorded in the Activity Log as well as the fulfillment notes associated with the search for visibility.

PLEASE NOTE	These tools become available once the registration is confirmed with the clinic provider and remain active until the candidate/employee has completed their clinic visit.
-------------	---

- Extend Expiration allows you to extend the expiration date by up to 30 days. Depending on your account configuration, the candidate will automatically receive a registration change email informing them of the new expiration date once confirmed.
- Cancel Registration allows you to invalidate a test registration so that it is no longer accepted at the clinic and prevents further reminder emails to the candidate. Once a registration is canceled, the search results will update to Unperformable with a status of Canceled.

PLEASE NOTE

Goodman, Sarah Jane #18:	29387220 🖸		Order Status: Pending
Overview Searches Atta	achments Activity Log		Copy Link
Order Summery		Candidata Inform	Report Comments
Order Started 2023-01-27	Order Completed	First Name Sarah	• View Classic
Account Name	Bill Code	Middle Name Jane	Manage D&HS Registration
OHS TEST ACCOUNT Position DHSTEST		Last Name Goodman	Select Registration *
Package	USDOT NUMBER	DOB 1975-01-01	Select Action *
Add Ons Drug & Health Test - Urine: 4P POCT Instant (eCup+)		SSN 999-99-6789	Cancel Su
Submitted Searches			Select Registration *
Drug & Health Test - Urine: 4P POCT	Goodman, Sarah Jane, EChain	2023-01-27	Escreen Drug 👻
			Select Action * Extend Expiration -
			Cancel Submit

#### Please refer to our <u>Drug & Health Screening Registration Management Tools User</u> <u>Guide</u> for more details.