

# Order Manager User Guide

Sterling | July 2023



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# Reduce time-to-hire by managing daily screening tasks with ease

## **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.

ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
1493496	Smith, Pete	Invite Sent	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
1801811756	Goodman, Sarah	Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
1801804133	Peterson, Melissa Y.	Drafted Order	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
1801796343	Martens, Terri L.	Action Needed	2022-09-07	Smith, Mark		2022-09-12	Acme Company	ID Profile
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.

ID	Candidate	Status / Result
1493496	Smith, Pete	Invite Sent
1801811756	Goodman, Sarah	Consider
1801804133	Peterson, Melissa Y.	Drafted Order
1801796343	Martens, Terri L.	Action Needed
1801795950	Durbin, Scott A.	Clear
1801769978	Smith, Cole D.	Pending
1801769572	Jones, Jessica J.	Consider
1801757095	Thompson, Bekoy J.	Clear
1801685863	Jones, James D.	Consider
1801578946	Charles, John T.	Consider
1801517524	Olsen, Tammy J.	Consider

**Goodman, Sarah #1801811756**

Order Status: Complete | Order Result: Consider

Overview | Searches | Attachments | Activity Log

**Order Summary**

Order Started: 2022-09-28 | Order Completed: 2022-09-28

Account Name: ACME COMPANY | Add Ons: ---

Position: --- | Bill Code: Blue Account

Package: Standard Criminal | Account Location: BELLEVUE, WA

**Candidate Information**

First Name: Sarah | Address: 123 First Ave, Seattle, WA 98116

Middle Name: --- | Email: SarahGoodman@sterlingcheck.com

Last Name: Goodman | Phone: ---

DOB: 1980-01-01 | Location of Employment: ---

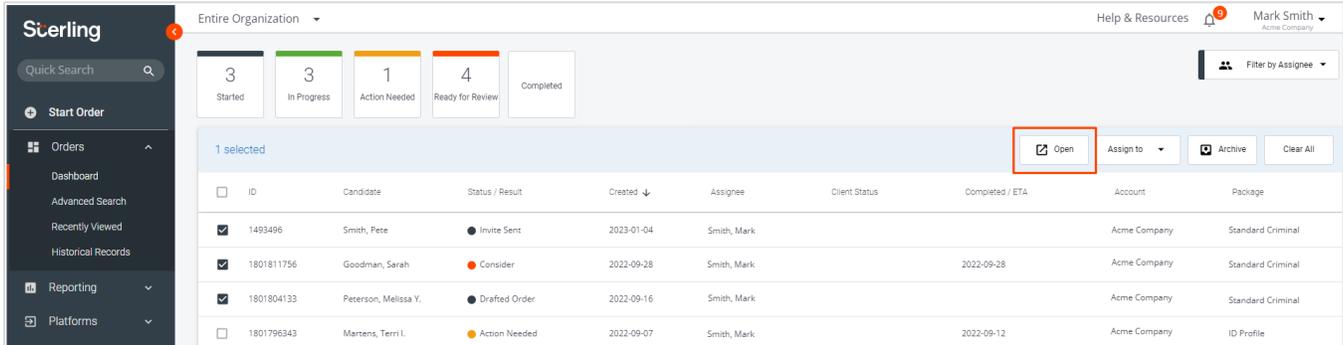
SSN: --- | Salary: Over \$75,000

**Drafted Searches**

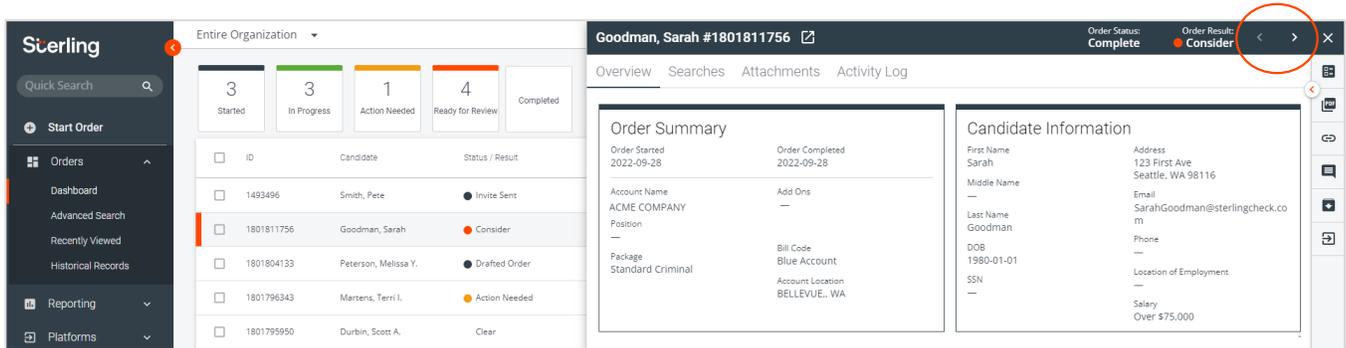
**Submitted Searches**

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

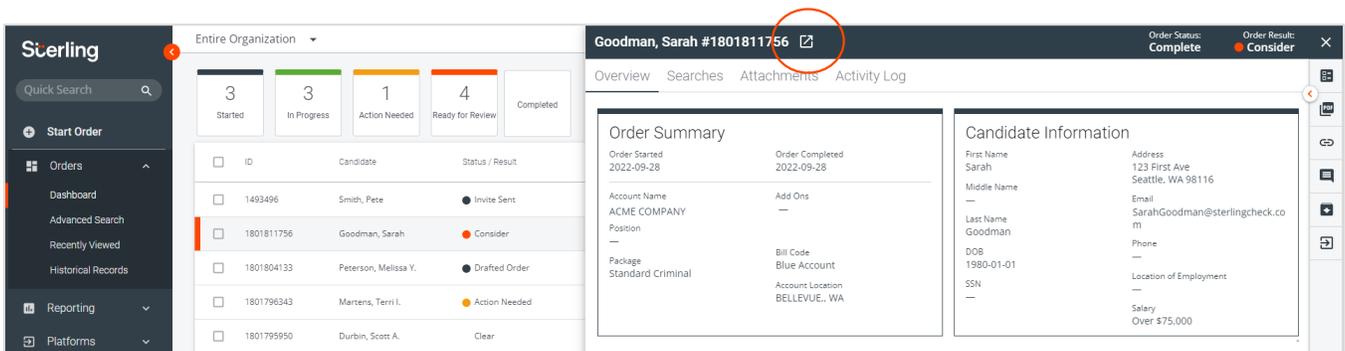
In the Order Grid, you can also check the box next to two or more orders and click the **Open** button from the top of the grid to view the Order Manager for multiple candidates.



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.



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.



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 #1801811756**
Order Status: **Complete**    Order Result: **Consider**

Overview
Searches
Attachments
Activity Log

### Sterling

#### Order Summary

Order Started: 2022-09-28    Order Completed: 2022-09-28

Account Name: ACME COMPANY    Add Ons: —

Position: —    Bill Code: Blue Account

Package: Standard Criminal    Account Location: BELLEVUE, WA

#### Candidate Information

First Name: Sarah    Address: 123 First Ave, Seattle, WA 98116

Middle Name: —    Email: SarahGoodman@sterlingcheck.com

Last Name: Goodman    Phone: —

DOB: 1980-01-01    Location of Employment: —

SSN: —    Salary: Over \$75,000

#### Drafted Searches

#### 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

- Client Matrix
- Export
- Copy Link
- Report Comments
- Archive

**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 Classic

<input type="checkbox"/>	Name	Account	User	Type	Position	BillCode
<input type="checkbox"/>	Goodman, Sarah	Acme Company	Smith, Mark	Standard Employee	Blue Account	

**Sterling**
SCREENING ASSESSMENTS DRUG TOOLS POSTHIRE DOCUMENTS REPORTS ANALYTICS

Screening Order Editor: Goodman, Sarah
Edit Order Info    Add Alias
Mark @ Acme Company

SSN / Pin Number: 921-41-2350

OrderID: 1801811756

Order Created: 9/28/2022

Order Submitted: 9/28/2022

Order Modified: 9/28/2022

Authorization: No file chosen

DOB: 1/1/1980

Position: Standard Employee

BillCode: Blue Account

Compliance: WA (Integration\_Disposition)

Salary: Over \$75,000

Driver License Result: Level3

Status: AdverseAction

Email Address: SSC7MCdemo-Demo123@gmail.com

Charge Type: Invoice Account

**Attachments**

Filename	Reference	Posted	User
Release Form.pdf		1/5/2023 9:52:00 PM ET	Demo Hub
Passport.pdf	Comprehensive Criminal for Global Screening - Goodman, Sarah	1/9/2023 4:55:00 PM ET	System
State Specific Form.pdf	County Criminal Record - WA-KING	1/5/2023 9:57:00 PM ET	Demo Hub

Summary New
Detail New
Summary Classic
Detail Classic

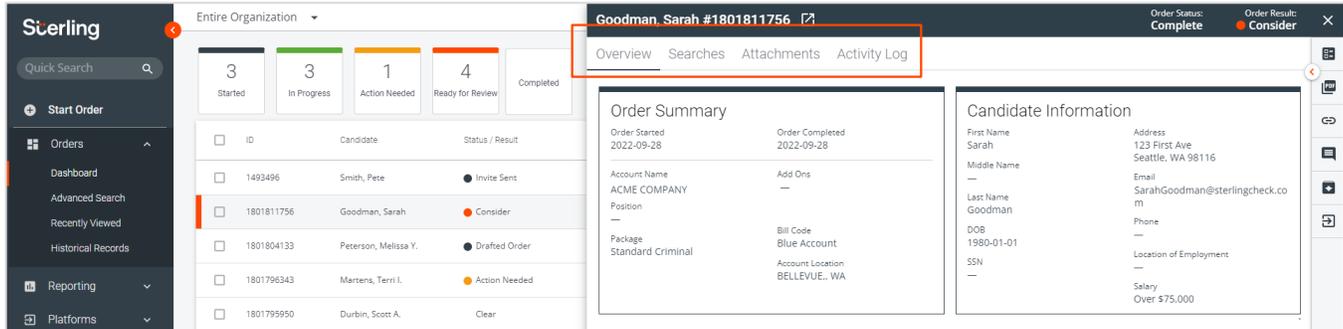
Search	Notes	Ordered	Done/ETA	Status	Result
SSN Trace 921-41-2350		9/28/2022 11:43 AM ET	9/28/2022	Complete	Complete
County Criminal Record Goodman, Sarah WA-KING		9/28/2022 11:43 AM ET	9/28/2022	Complete	Consider
Comprehensive Criminal for Global Screening Goodman, Sarah United Kingdom - DBS Basis - Client Evidence of Identity		9/28/2022 12:05 PM ET	9/28/2022	Complete	Clear

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## 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**.



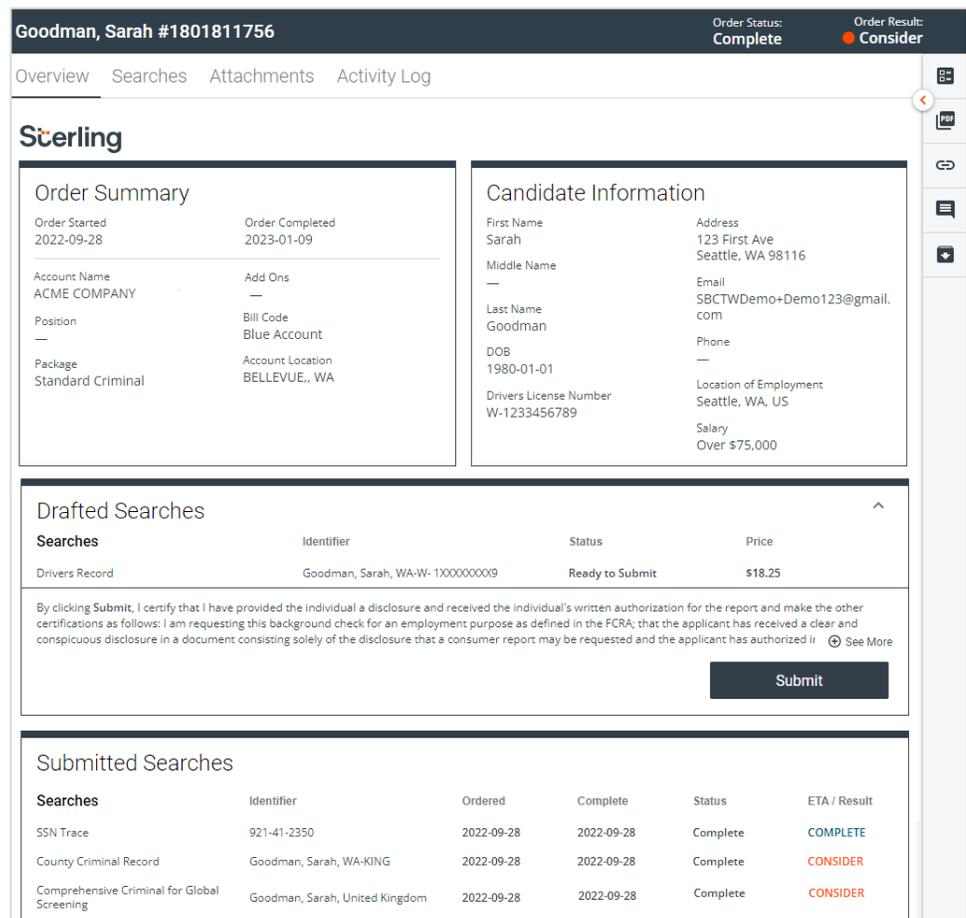
## Overview

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.



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

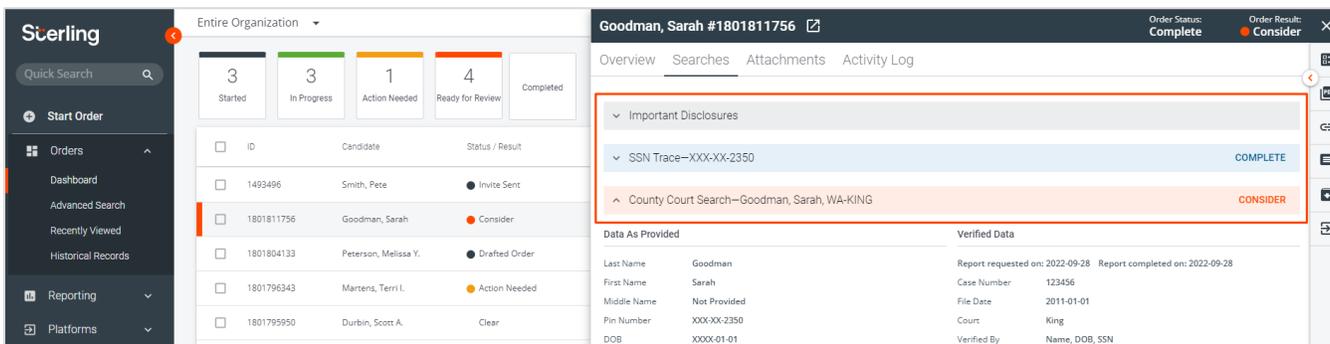
Once a search is in **Ready to Submit** status, you will see the client certification text appear along with a **Submit** button. The client certification language is dynamic based on your company location and can be viewed and expanded at any time by selecting the **See More** icon. Selecting Submit 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.



### 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.)

## 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.

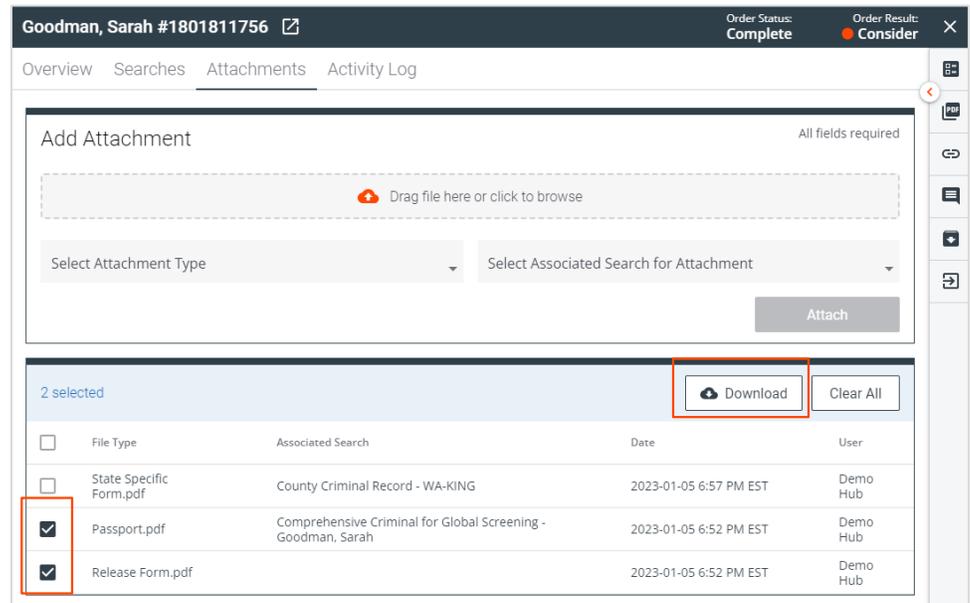
<input type="checkbox"/>	File Type	Associated Search	Date	User
<input type="checkbox"/>	State Specific Form.pdf	County Criminal Record - WA-KING	2023-01-05 6:57 PM EST	Demo Hub
<input type="checkbox"/>	Passport.pdf	Comprehensive Criminal for Global Screening - Goodman, Sarah	2023-01-05 6:52 PM EST	Demo Hub
<input type="checkbox"/>	Release Form.pdf		2023-01-05 6:52 PM EST	Demo Hub

**PLEASE NOTE** Files uploaded to the Order Manager Attachments tab are not visible to the candidate. 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.

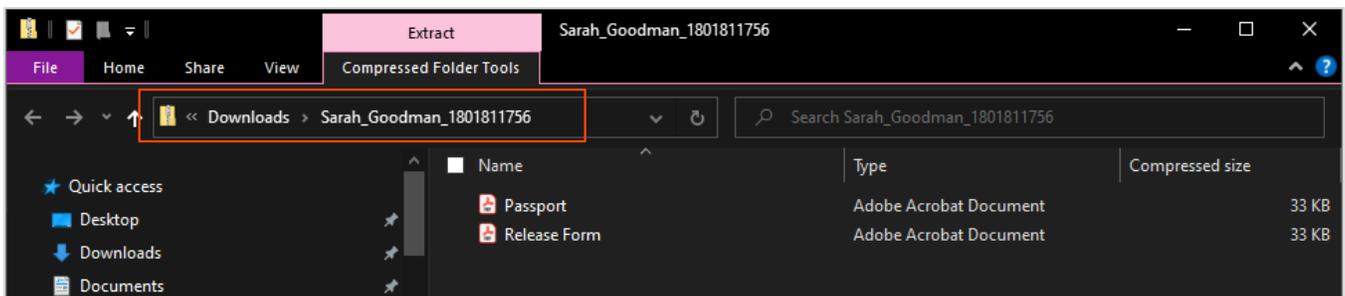
You can also download a single file or multiple files at one time in this section.

To download a single file simply tap on the File Name.

To download multiple documents at one time, select the checkboxes of the documents you wish to download in the files list, then select **Download**. A zip file will be created with all the selected files.



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*



## 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.

Goodman, Sarah #1801811756 <a href="#">🔗</a>			Order Status: Complete	Order Result: Consider	✕
<a href="#">Overview</a> <a href="#">Searches</a> <a href="#">Attachments</a> <a href="#">Activity Log</a>					
Date	User	Activity			
2022-09-28 12:02 PM EDT	System	Order status changed to Complete			
2022-09-28 12:02 PM EDT	System	Order result changed to Consider			
2022-09-28 11:43 AM EDT	Demo Hub	Order status changed to Pending			
			Rows per page 10	1-7 of 7	< >

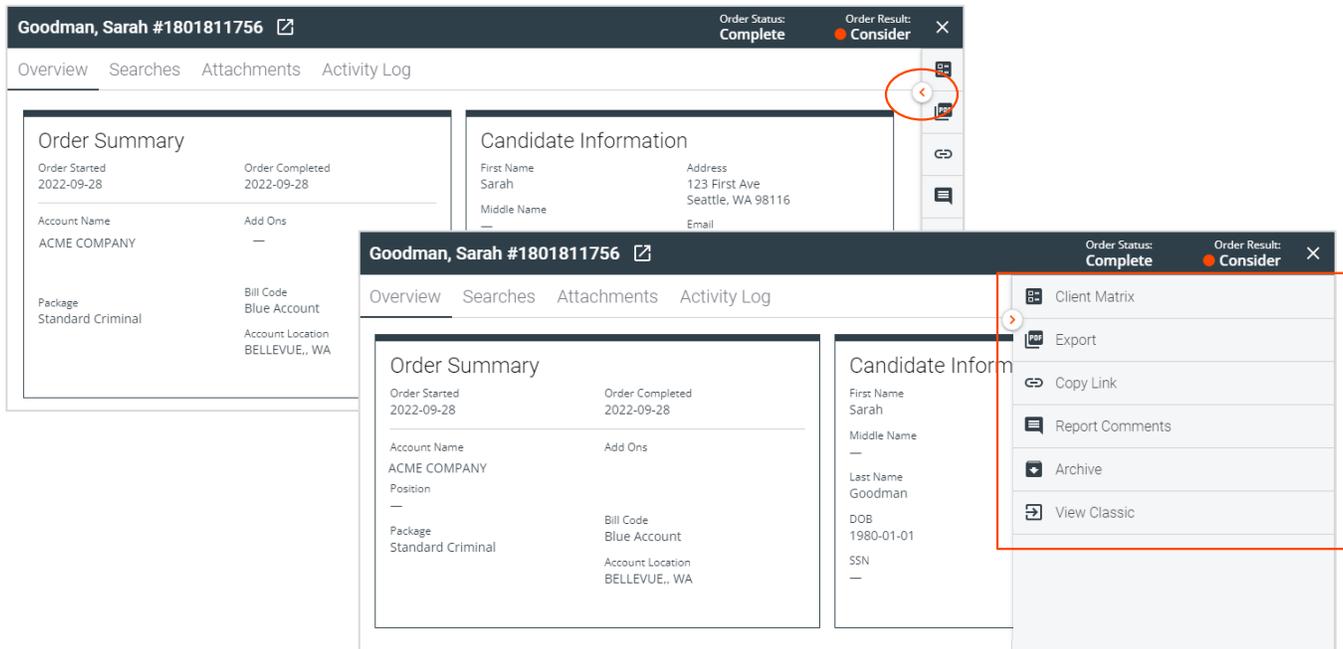
The following events are logged within the Activity Log:

- Order Status Change
- Order Result Change
- Client Status Change
- Client Comments (internal only)
  - CMA Comments
  - Client Status Comments
  - Report Comments
- Adverse Action (US Specific)
  - Initiated Adverse Action
  - Pause/Cancel/Resume Adverse Action
  - Candidate related Adverse Action
- Fair Chance (US Specific)
  - Initiated Fair Chance
  - Candidate related Fair Chance
- Individualized Assessment (US Specific)
  - Initiated Individualized Assessment
  - Candidate related Individualized Assessment
- Drug & Health Services (US Specific)
  - Registration Modifications
- Candidate Action
  - Viewed Completed Report in Candidate Hub
  - Viewed Workflow document in Candidate Hub
  - 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 right-hand side, allowing you to take action anywhere within the Order Manager.



**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.

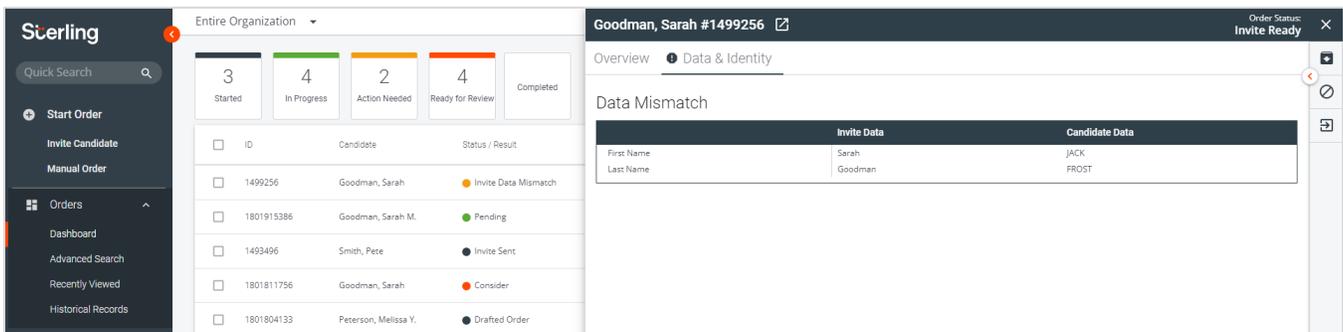
## Client Configurable Features

### Data & Identity

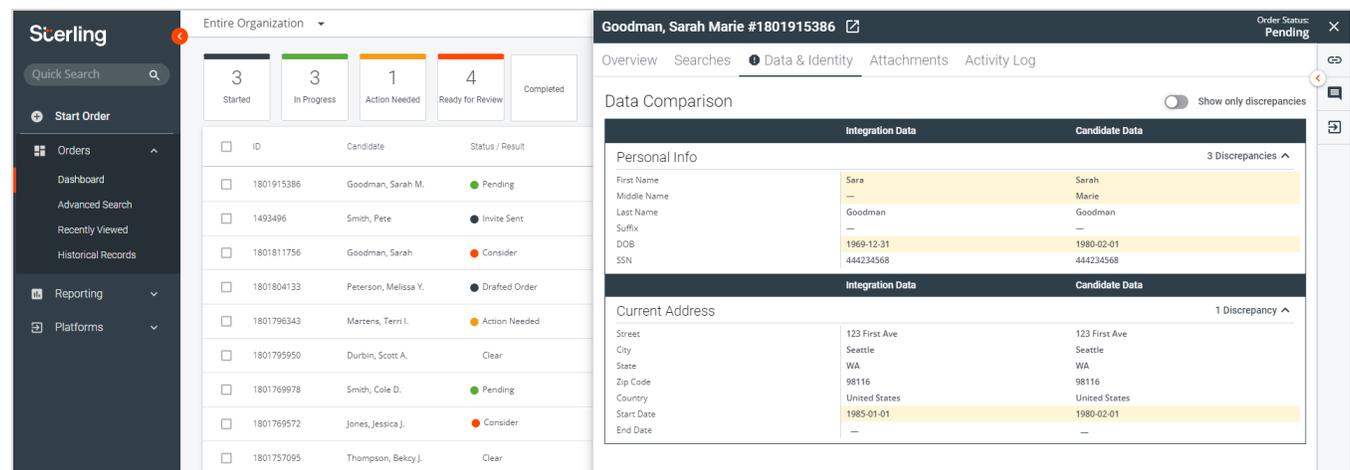
If you utilize Sterling’s Identity Verification service, and/or have an Applicant Tracking System integration , you will see a Data & Identity tab next to the Overview tab. Clicking on the Data & Identity tab will display the results from the candidate’s Identity search, and/or a comparison of the candidate 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.



**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.

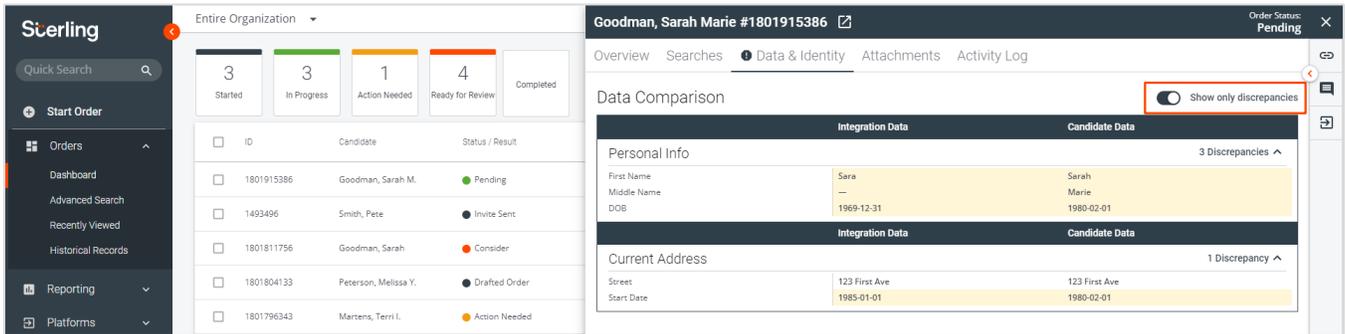


The following data points are compared within Data Comparison:

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

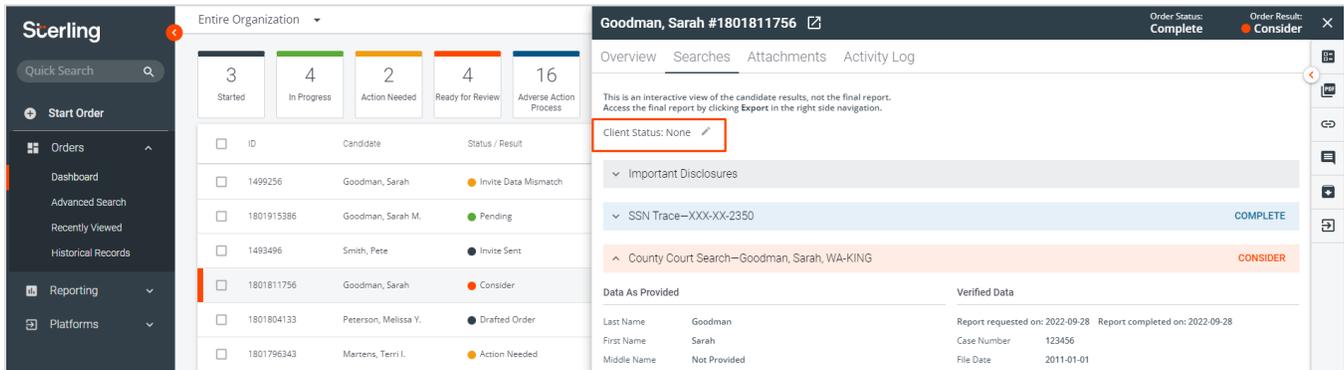
- Employment History
- Education
- Self-Disclosed information

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.



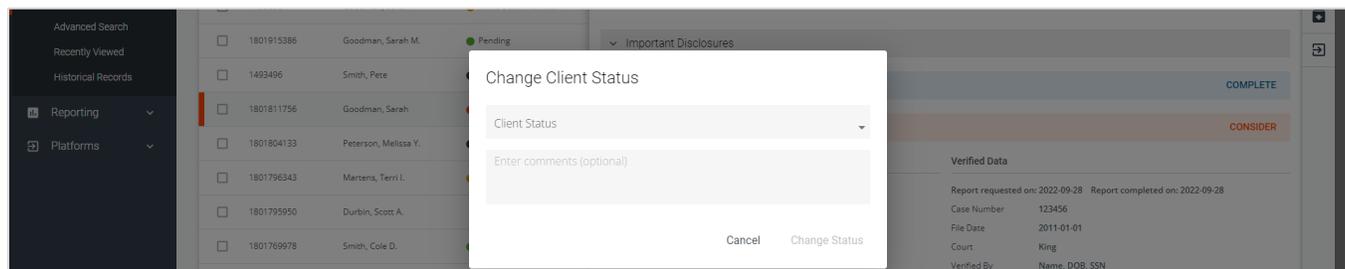
## Client Status

If you utilize Sterling's Client Status (formerly 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.

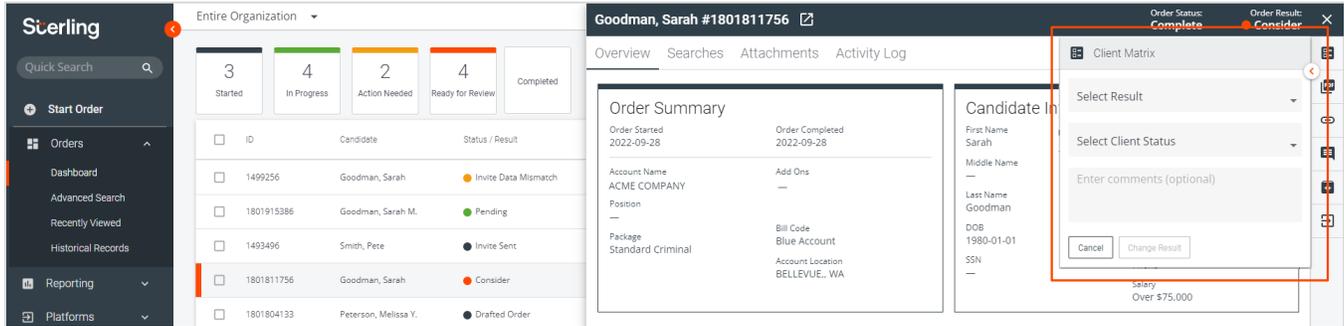


There are two ways that a Client Status can be assigned or changed on an order within the Order Manager.

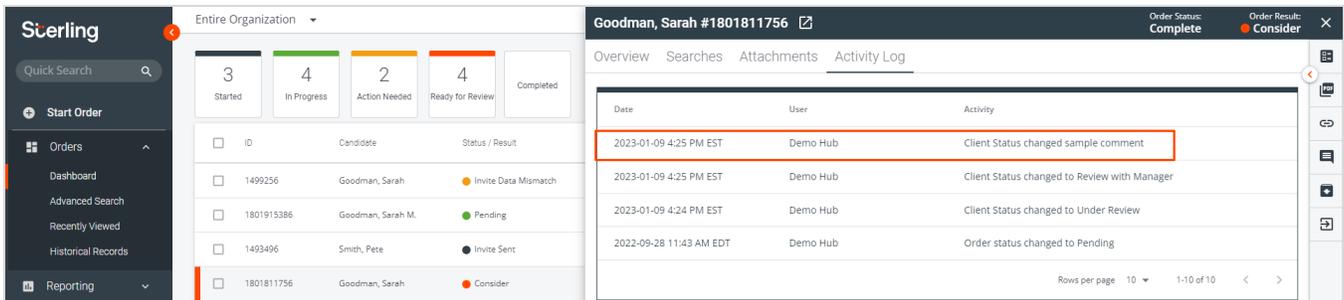
**Client Status Change Only:** On the top left of the Searches tab, you will see Client Status. By selecting the **pencil icon**, you can change the Client Status value associated with the order without having to change the order result. You will also have the option to enter notes to associate with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



**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 **Client Matrix icon** 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.



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.



## U.S. Specific Features

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

The screenshot displays the Sterling Order Manager interface. On the left is a navigation sidebar with options like 'Start Order', 'Orders', 'Reporting', and 'Platforms'. The main area shows a candidate list with columns for ID, Candidate Name, and Status/Result. The candidate Goodman, Sarah #1801811756 is highlighted. To the right, a detailed view for this candidate is shown, including sections for 'Important Disclosures' (SSN Trace, County Court Search) and 'Data As Provided' (Last Name, First Name, etc.). A red box highlights the 'Initiate Pre-Adverse Action' button in the top right corner of the candidate detail view.

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 / Result 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.

This screenshot shows the same candidate detail view for Goodman, Sarah #1801811756. The 'Order Status' is now 'Pre-Adverse Action Initiated' and the 'Order Result' is 'Level3'. A red box highlights two buttons: 'Cancel Adverse Action' and 'Pause Adverse Action', which are located in the top right corner of the candidate detail view.

- **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.

The screenshot shows the Sterling Order Manager interface. On the left is a navigation sidebar with options like 'Start Order', 'Orders', 'Dashboard', 'Advanced Search', 'Reporting', and 'Platforms'. The main area displays a candidate profile for 'Goodman, Sarah #1801811756'. At the top, there are progress indicators for 'Started' (3), 'In Progress' (4), 'Action Needed' (2), 'Ready for Review' (3), and 'Adverse Action Process' (17). The candidate's status is 'Adverse Action Paused' with a 'Level 3' result. Below the header, there are tabs for 'Overview', 'Searches', 'Attachments', and 'Activity Log'. The 'Overview' tab is active, showing a table of searches: 'Important Disclosures', 'SSN Trace—XXX-XX-2350' (COMPLETE), and 'County Court Search—Goodman, Sarah, WA-KING' (CONSIDER). There are buttons for 'Cancel Adverse Action' and 'Resume Adverse Action'. At the bottom, it shows 'Data As Provided' and 'Verified Data' for the candidate.

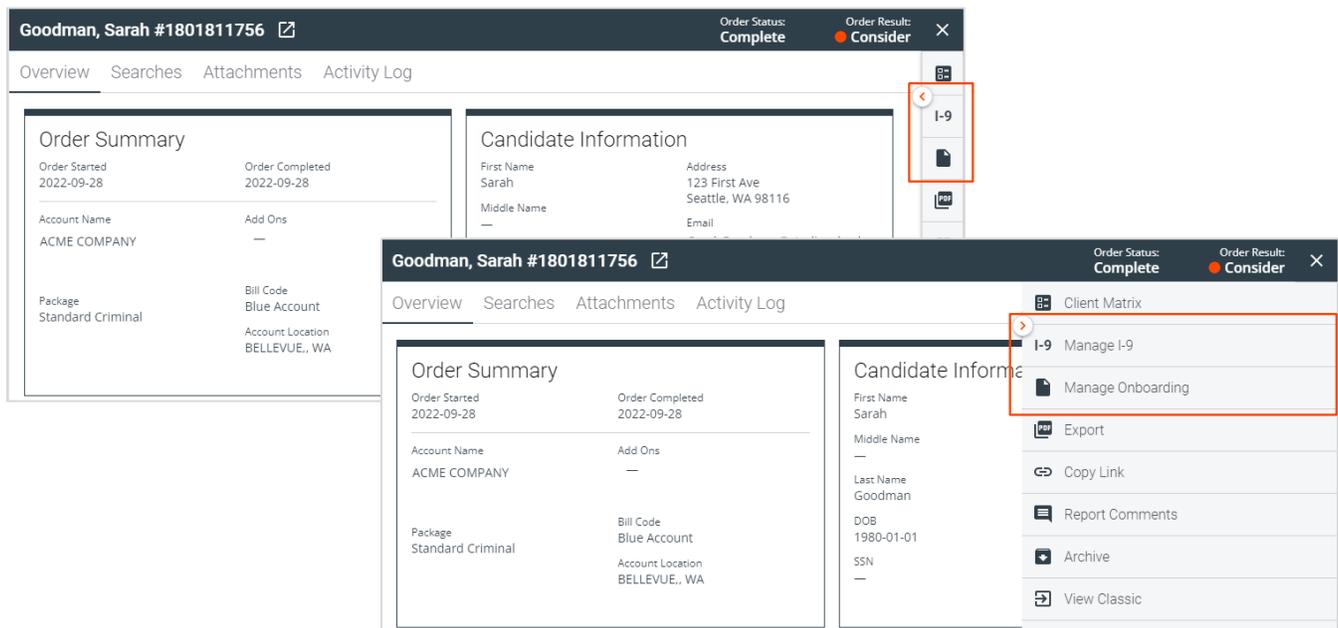
**PLEASE NOTE** Please refer to our Adverse Action, Fair Chance, and Individualized Assessment User Guides for more details. [Adverse Action User Guide](#) | [Individualized Assessment User Guide](#) | [Fair Chance User Guide](#)

**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.

Employment Verification - DOT—Goodman, Sarah ABC Trucking		CLEAR
<b>Provided Data</b>		
Name	Sarah Goodman	
SSN	XXX-XX-XXXX	
Start Date	2022-01-01	
End Date	Not Provided	
Position	Driver	
Type of Employment	Not Provided	
<b>Verified Data</b>		
Report requested on: 2023-05-02 Report completed on: 2023-05-02		
Employer Name	ABC Trucking	
Start Date	2022-01-01	
End Date	not applicable	
Position	Driver	
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.	
<b>Fulfillment Notes</b>		
2023-05-02	Inbound Fax Entity Jane Anderson DER Result Provided	
2023-05-02	Inbound Call Entity Jane Anderson DER Status Update Provided. Confirming fax was received	
2023-05-02	Outbound Fax Entity Jane Anderson  DER Contact Attempt	
2023-05-02	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.



**PLEASE NOTE** Please refer to our [Sterling I-9 User Guide](#) 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.

**Goodman, Sarah Jane #1829387220** Order Status: Pending

Overview Searches Attachments Activity Log

### Order Summary

Order Started 2023-01-27	Order Completed —
Account Name OHS TEST ACCOUNT	Bill Code —
Position DHSTEST	Account Location 79903, NC
Package —	USDOT NUMBER —
Add Ons Drug & Health Test - Urine: 4P POCT Instant (eCup+)	

### Candidate Information

First Name  
Sarah

Middle Name  
Jane

Last Name  
Goodman

DOB  
1975-01-01

SSN  
999-99-6789

Copy Link

Report Comments

View Classic

**Manage D&HS Registration**

Select Registration \*  
▼

Select Action \*  
▼

Cancel Submit

### Submitted Searches

Searches	Identifier	Ordered	Complete
Drug & Health Test - Urine: 4P POCT Instant (eCup+)	Goodman, Sarah Jane, EChain	2023-01-27	

### Manage D&HS Registration

Select Registration \*  
Escreen Drug ▼

Select Action \*  
Extend Expiration ▼

Cancel Submit

**PLEASE NOTE**

Please refer to our [Drug & Health Screening Registration Management Tools User Guide](#) for more details.