



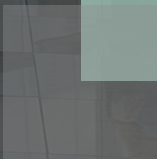

Client Hub User Guide

Sterling | July 2023



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Accelerate time-to-hire by managing daily screening tasks with ease

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. Built with feedback from HR professionals like yourself in mind, our modern, easy-to-use, intuitive Client Hub has been specifically designed to help manage your daily workload with ease and accelerate your time-to-hire.

HERE'S HOW STERLING DELIVERS A HEIGHTENED CLIENT EXPERIENCE:

- A modern, mobile-responsive design that's accessible anytime, anywhere
- A permission-based hub allows you to view only the orders that are relevant to you
- An intuitive order pipeline that's easy to navigate
- Easily assign, unassign or reassign orders and invites
- Conveniently review alerts and updates without ever having to leave your dashboard
- An easy-to-read and actionable order manager with color-based results and collapsible / expandable search details

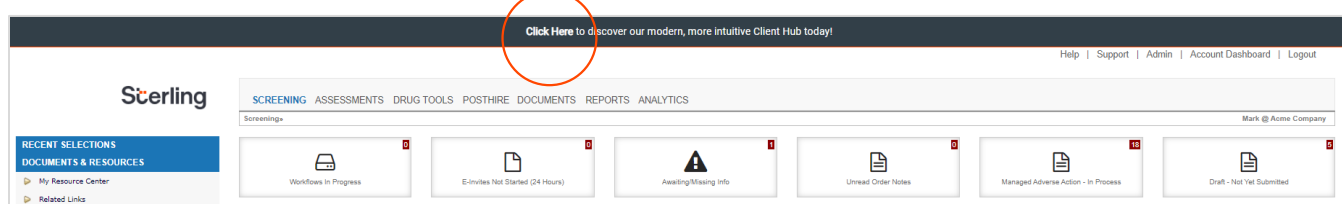
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Accessing Client Hub

You can conveniently access your Sterling account via the Client Hub by entering your username and password on our main login page. We encourage you to bookmark this site to easily access your account moving forward. For more information on the login process, please refer to the Client Hub Login User Guide that corresponds to your account set-up configuration: [Single Sign-On \(SSO\)](#), [SAML SSO](#), or [Multiple Accounts](#).

Additionally, you can also view the Client Hub by selecting the [Click Here](#) in the banner across the top of the Classic dashboard shown below.



Client Hub Dashboard View

Once you access the Client Hub, you will see an intuitive order dashboard with front-and-center, real-time order status and results.

Order Pipeline: Located at the top of the Sterling Hub dashboard, there are a series of tiles that group your orders by their respective status/result. As shown below, these tiles are labeled **Started**, **In Progress**, **Action Needed**, **Ready for Review**, and **Completed**. You can click on these tiles to view your orders that are in a particular status/result in more detail. The data shown in each tile will go back 13 months.

Entire Organization									
<div> <div>3 Started</div> <div>3 In Progress</div> <div>1 Action Needed</div> <div>4 Ready for Review</div> <div>Completed</div> </div>									
<input type="checkbox"/>	ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
<input type="checkbox"/>	1493496	Smith, Pete	● Invite Sent	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
<input type="checkbox"/>	1801811756	Goodman, Sarah	● Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
<input type="checkbox"/>	1801804133	Peterson, Melissa Y.	● Drafted Order	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
<input type="checkbox"/>	1801796343	Martens, Terri L.	● Action Needed	2022-09-07	Smith, Mark		2022-09-12	Acme Company	ID Profile
<input type="checkbox"/>	1801795950	Durbin, Scott A.	● Clear	2022-09-06	Smith, Mark		2022-10-19	Acme Company	Standard + EMP Package
<input type="checkbox"/>	1801769978	Smith, Cole D.	● Pending	2022-08-16	Smith, Mark		2022-08-19	Acme Company	Standard Criminal

PLEASE NOTE

If you hire within the U.S., you may see an additional **Adverse Action Process** tile. Please [click here](#) to read more US-specific feature details, like Adverse Action.

Started: Clicking on the **Started** tile will display all Invites and Drafted Orders that have not been submitted for fulfillment. Within this view, you will be able to drill down and see Drafted and Invite status information:

- **Invite Queued:** Invite has been created via an integration link, a Portal Code, or has not generated an email to the candidate.
- **Invite Sent:** Invite has been created but the candidate has not yet opened the invitation.
- **Invite Incomplete:** The candidate accepted the invitation but has not yet completed data entry.

- **Invite Ready:** The candidate's data entry is complete, but you have not yet submitted the order.
- **Drafted Order:** Order has been started but you have not yet submitted to Sterling for processing.

In Progress: Clicking the **In Progress** tile will display all orders that are pending and in the process of being fulfilled by Sterling.

Action Needed: Clicking the **Action Needed** tile will give you access to a centralized location to view pending orders that have any open requests that require some kind of action to be taken from either the candidate or yourself for the order/search to continue being processed.

Ready for Review: Clicking on the **Ready for Review** tile will display orders that are completed and have an order level result of Consider, Review, Level 2, and/or Level 3. The results shown will vary depending on your account configuration, as indicated below:

If you don't utilize Sterling Client Matrix Application:

- **Consider:** Fulfillment is complete, and one or more findings were listed.

If you utilize Sterling's 2 level Client Matrix Application:

- **Review:** Fulfillment is complete, and one or more findings were listed.

If you utilize Sterling's 3 level Client Matrix Application

- **Level 2:** Fulfillment is complete, and one or more finding were listed.
- **Level 3:** Fulfillment is complete, and one or more finding were listed.

The screenshot displays the Sterling Client Hub interface. On the left is a sidebar with navigation options: Quick Search, Start Order, Orders, Dashboard, Advanced Search, Recently Viewed, Historical Records, Reporting, and Platforms. The main area shows a list of orders under the 'Entire Organization' filter. The 'Ready for Review' tab is selected, showing a list of orders. One order, ID 1801811756 for candidate Goodman, Sarah, is highlighted with a red box and has a 'Consider' status. To the right, a detailed view of this order is shown. It includes an 'Order Summary' with dates and account information, 'Candidate Information' with personal details, and a 'Submitted Searches' table. The 'Submitted Searches' table has columns for Searches, Identifier, Ordered, Complete, Status, and ETA / Result. It lists three searches: SSN Trace (COMPLETE), County Criminal Record (CONSIDER), and Comprehensive Criminal for Global Screening (CLEAR).

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

There are also two sets of circumstances where an order would display a **Hold** status.

- **If you are enabled for CMA and your matrix includes Unperformable Searches.** If the order is completed but one or more searches is scored as unperformable either due to an unresponsive candidate and/or other entity, or an entity is closed, and we are unable to verify.
- If an order is placed on hold manually by Sterling's operations team, either at your direct request or for another reason.

Completed: Clicking on the **Completed** tile will display orders that are completed and have an order level result of Clear, Pass, or Level 1. The results shown will vary depending on your account configuration, as indicated below:

- **Clear:** Fulfillment is complete and order level results is Clear
- **Pass:** Fulfillment is complete and order level result is Pass
- **Level 1:** Fulfillment is complete and order level result is Level 1

PLEASE NOTE Archived Orders, Expired Invites, Canceled Invites, and Archived Invites can be accessed via Quick Search or Advanced Search.

Order Grid: Directly under the Order Pipeline, you will see the invite/order grid. From this grid, you can click on a row to view either the Invite Manager or Order Manager. Some of the columns within the order grid can be selected to sort data by different criteria, including Candidate, Created, Assignee, Account, and Package.

If you are enabled for Client Status, this will be visible within your order grid and can be sorted accordingly.

Sterling									
Entire Organization									
<div> <div>3 Started</div> <div>3 In Progress</div> <div>1 Action Needed</div> <div>4 Ready for Review</div> <div>Completed</div> </div>									
<div> <div>Quick Search</div> <div>Start Order</div> <div>Orders</div> <div>Dashboard</div> <div>Advanced Search</div> <div>Recently Viewed</div> <div>Historical Records</div> <div>Reporting</div> <div>Platforms</div> </div>									
<input type="checkbox"/>	ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
<input type="checkbox"/>	1493496	Smith, Pete	● Invite Sent	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
<input type="checkbox"/>	1801811756	Goodman, Sarah	● Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
<input type="checkbox"/>	1801804133	Peterson, Melissa Y.	● Drafted Order	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
<input type="checkbox"/>	1801796343	Martens, Terri L.	● Action Needed	2022-09-07	Smith, Mark		2022-09-12	Acme Company	ID Profile
<input type="checkbox"/>	1801795950	Durbin, Scott A.	Clear	2022-09-06	Smith, Mark		2022-10-19	Acme Company	Standard + EMP Package
<input type="checkbox"/>	1801769978	Smith, Cole D.	● Pending	2022-08-16	Smith, Mark		2022-08-19	Acme Company	Standard Criminal

PLEASE NOTE For more in-depth invite and order features, please download the following User Guides:
[Invite Manager User Guide](#) | [Order Manager User Guide](#) | [Manual Order User Guide](#)

If you want to make a bulk action, you can select the checkbox next to any corresponding invite/order, and four buttons will appear at the top of the screen that give you the option to bulk open, archive, assign, and/or unassign the selected items.

- **Open:** Clicking **Open** allows you to select two or more invites/orders to open within the drawer view and take further action.
- **Assign To:** Clicking **Assign To** allows you to select two or more invites/orders and assign them to a user within your organization.
- **Archive:** Clicking **Archive** allows you to select two or more invites/orders that you want to move into an archive state.
- **Clear All:** Clicking **Clear All** will clear the selections that you have made.

Entire Organization

Help & Resources Mark Smith

3 Started 3 In Progress 1 Action Needed 4 Ready for Review Completed

1 selected

Open Assign to Archive Clear All

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

Left Navigation Options

To the left of the Sterling dashboard, you will see multiple tabs listed. When clicked, these tabs allow you to easily navigate between different areas of the Client Hub.

Entire Organization

Help & Resources Mark Smith

3 Started 3 In Progress 1 Action Needed 4 Ready for Review Completed

Filter by Assignee

ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
<input type="checkbox"/> 1493496	Smith, Pete	● Invite Sent	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
<input type="checkbox"/> 1801811756	Goodman, Sarah	● Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
<input type="checkbox"/> 1801804133	Peterson, Melissa Y.	● Drafted Order	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
<input type="checkbox"/> 1801796343	Martens, Terri L.	● Action Needed	2022-09-07	Smith, Mark		2022-09-12	Acme Company	ID Profile
<input type="checkbox"/> 1801795950	Durbin, Scott A.	● Clear	2022-09-06	Smith, Mark		2022-10-19	Acme Company	Standard + EMP Package
<input type="checkbox"/> 1801769978	Smith, Cole D.	● Pending	2022-08-16	Smith, Mark		2022-08-19	Acme Company	Standard Criminal
<input type="checkbox"/> 1801769572	Jones, Jessica J.	● Consider	2022-08-16	Smith, Mark		2022-10-21	Acme Company	ID Profile
<input type="checkbox"/> 1801757095	Thompson, Bekky J.	● Clear	2022-08-04	Smith, Mark		2022-08-09	Acme Company	Standard + EMP Package
<input type="checkbox"/> 1801685863	Jones, James D.	● Consider	2022-05-26	Smith, Mark		2022-08-24	Acme Company	Standard Criminal

Start Order

- **Invite Candidate:** Clicking **Invite Candidate** will allow you to create a new background screening invite. This process supports the creation of a single or bulk invite upload.
- **Manual Order:** Clicking **Manual Order** will allow you to create a new background screening directly within the platform using the candidate's information.

Orders

- **Dashboard:** Clicking **Dashboard** will reset any filters and/or other sorting criteria that had been previously selected in the Order Grid. Selecting this option will also return you to the main Dashboard view, if you have been working in another tab.
- **Advanced Search:** Clicking **Advanced Search** will allow you to drill down to the order/invite data that you find most relevant.
- **Recently Viewed:** Clicking **Recently Viewed** will allow you to see the last 15 invites/orders that you have viewed in a central view.

- **Historical Records:** Clicking [Historical Records](#) will allow you to view completed order data, including orders that were completed on a legacy platform.

Reporting: If your Sterling account is configured for Analytics Hub access, clicking [Reporting](#) will reveal a sub-tab called Analytics. Clicking the Analytics sub-tab will open a new browser window where you will be prompted to enter your Analytics Hub credentials.

Platforms: If your Sterling account has recently been upgraded to Client Hub, clicking [Platforms](#) will allow you to access your previous account interface.

PLEASE NOTE If you hire within the U.S., you may utilize Sterling I-9 or Onboarding services. Please [click here](#) to read more information about U.S. specific features.

Creating an Invite in the Client Hub

You can create a screening invite for a candidate or submit information on a candidate's behalf from the Start Order menu in the left navigation bar.

Invite Candidate: Clicking [Invite Candidate](#) will take you to a New Order Setting card where you can start the invite creation process. To walk through how to create an invite in the Client Hub in detail, please download the [Invite Manager User Guide](#).

Manual Order: Clicking [Manual Order](#) will take you to a New Order Setting card where you can start the draft order creation process. To walk through how to create a Manual Order in Client Hub in detail, please download the [Manual Order User Guide](#).

Sterling

Quick Search

Start Order

Invite Candidate

Manual Order

Entire Organization

Help & Resources

Mark Smith

Filter by Assignee

4

Started

3

In Progress

1

Action Needed

5

Ready for Review

Completed

<input type="checkbox"/>	ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
<input type="checkbox"/>	1438971	Smith, Charles	● Invite Sent	9/28/2022	Smith, Mark			Acme Company	Standard Criminal

Top Navigation Options

Across the top of the Client Hub, you will see navigation options which will allow you to select different organization views, access Help & Resources, view alert notifications, and access your user Account Dashboard.

The screenshot shows the Sterling Client Hub interface. At the top, there is a navigation bar with the Sterling logo on the left, a dropdown menu for 'Entire Organization', and links for 'Help & Resources', a notification bell, and a user profile for 'Mark Smith'. Below the navigation bar, there are five status filters: '3 Started', '3 In Progress', '1 Action Needed', '4 Ready for Review', and 'Completed'. The main content area displays a table of candidates with columns for ID, Candidate, Status / Result, Created, Assignee, Client Status, Completed / ETA, Account, and Package. The table lists several candidates, including Pete Smith, Sarah Goodman, Melissa Peterson, Terri Martens, Scott Durbin, and Cole Smith.

View Organization: The **View Organization** feature allows users to access customized views that have been set up within their organization for order and invites. Based on your access level, you will also have default views configured. For example, if you are set up as a super user, you will have access to all orders and invites and your default view will be **Entire Organization**. If you are set-up as a non-super user, your default view will only show orders and invites that you personally have initiated, and your default view will be **My Background Checks**. Users may also configure a custom default in their user profile.

This screenshot shows the Sterling Client Hub interface with the 'Entire Organization' dropdown menu open. The menu lists options: 'Entire Organization', 'My Background Checks', 'East', and 'West'. The main content area shows the same candidate table as the previous screenshot, but with the 'Ready for Review' filter selected.

Help & Resources: Clicking **Help & Resources** will take you to a portal where you can easily access helpful content such as answers to commonly asked questions, sample documents, and user guides.

The screenshot shows the Sterling Help & Resources portal. On the left, there is a sidebar with links to 'Important Service Updates', 'Sterling Status Center', 'Getting Started', 'New Experiences', 'United States', 'EMEA', 'Compliance Forms', 'FCRA', 'Consent Forms', 'Complete User Guides', and 'Administrative Functions'. The main content area features a heading 'Experiences, Redefined' and a subheading 'Simplifying how candidates and clients engage throughout the screening process'. Below this, there is a paragraph about the company's commitment to innovation and a list of bullet points highlighting new features and improvements.

Alert Notifications Icon: The **Alert Notification** icon allows you to conveniently review system alerts and important updates without having to leave your dashboard. The alert icon drop down includes notifications from the screeningdirect.info site, as well as new assignments from the Assignee function. If a general alert is selected, a pop up will display additional details. If an assigned alert is selected, your order grid view will update to show all invites and orders assigned to you. If you select the **Clear All** located on the top right of the drop down, all notifications will be removed.

The screenshot shows the Sterling Client Hub dashboard. The top navigation bar includes the Sterling logo, a search bar, and a user profile dropdown for Mark Smith. The main dashboard area features a summary of order statuses: 3 Started, 3 In Progress, 1 Action Needed, 4 Ready for Review, and a Completed status. Below this is a table of orders with columns for ID, Candidate, Status / Result, Created, Assignee, Client Status, and Completed / ETA. On the right side, the Alerts dropdown menu is open, showing a list of notifications including 'You have been assigned candidates', 'Criminal, verification, and drug & health delays expected as Winter Storm Elliott tracks through the Midwest, Northeast and South', and 'Compliance Update: Atlanta Amends Anti-Discrimination Ordinance to Include Criminal History'.

User Drop Down: The first and last name of the individual currently using Client Hub will be displayed in the upper right-hand corner. The **Account Dashboard** tab will route you back to the Account Dashboard where you can select other linked accounts for your user credentials.

When you select **Logout**, you will be logged out of all Sterling platforms connected to the new Account Dashboard.

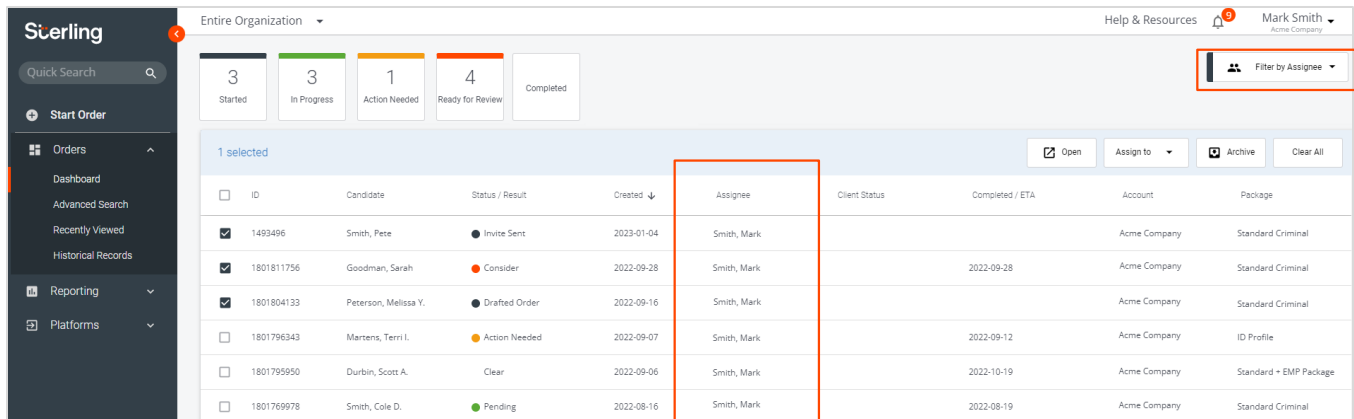
The screenshot shows the Sterling Client Hub dashboard with the Account Dashboard dropdown menu open. The menu options are 'Account Dashboard' and 'Logout'. The main dashboard area is the same as in the previous screenshot, showing the order status summary and the table of orders.

Case Management

The Case Management feature allows you to conveniently assign, unassign and reassign orders and invites within the Client Hub.

The dashboard column **Assignee** will display the name of the individual who is assigned to an order/invite. The assignee can be different then the user who created the order/invite, but your account can be configured to auto-assign an invite/order to the user who created it. The designation “unassigned” will show for any unassigned orders or invites.

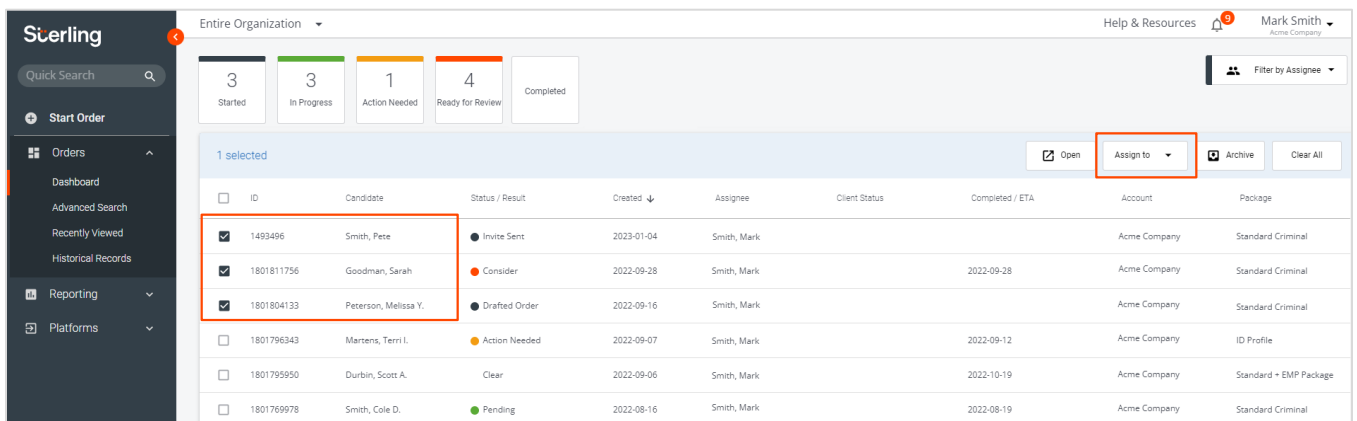
If you click on the **Filter by Assignee** drop down, you can select yourself or another member of your team, view that individual’s assigned orders/invites, and assign items to yourself or other users. This drop down also contains the option to filter by “unassigned” orders/invites.



The screenshot shows the Sterling Client Hub dashboard. The top navigation bar includes the Sterling logo, a search bar, and user information (Mark Smith, Acme Company). The main content area features a sidebar with navigation options (Start Order, Orders, Reporting, Platforms) and a central grid of orders. The grid has columns for ID, Candidate, Status / Result, Created, Assignee, Client Status, Completed / ETA, Account, and Package. A red box highlights the 'Filter by Assignee' dropdown in the top right corner of the grid.

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

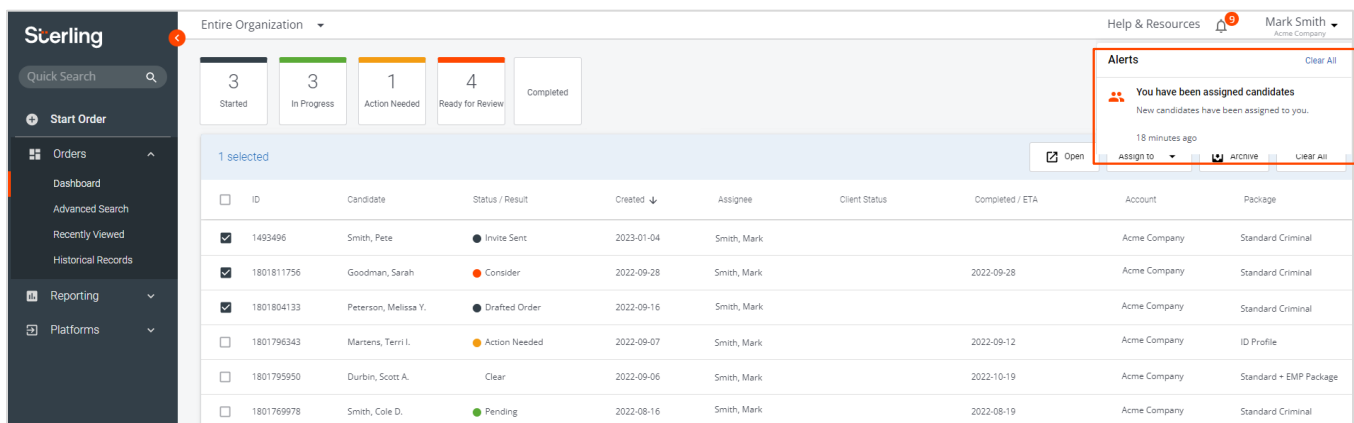
The order grid checkbox functionality allows you to select multiple orders/invites and assign them to a specific individual to be managed. This can be done from any page by selecting the order/invite and using the **Assign to** drop down within the grid.



The screenshot shows the Sterling Client Hub dashboard with three rows selected in the order grid. The 'Assign to' dropdown is highlighted in the top right corner of the grid.

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

As assignments are made, alert notifications will become visible under the **Alerts Notification Icon**.



The screenshot shows the Sterling Client Hub dashboard with an alert notification visible in the top right corner. The alert states: 'You have been assigned candidates. New candidates have been assigned to you. 18 minutes ago.' The alert notification icon is highlighted in the top right corner.

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

Search Options

There are three Search options available to you within the Client Hub.

Quick Search: When using the **Quick Search** bar above the left navigation options, you can search for a candidate quickly by first name, last name, order ID or invite ID. Once on the Quick Search view, you can browse a candidate's Order/Invite Manager to perform any necessary actions. Quick Search will return data for orders that have been completed within the last 13 months.

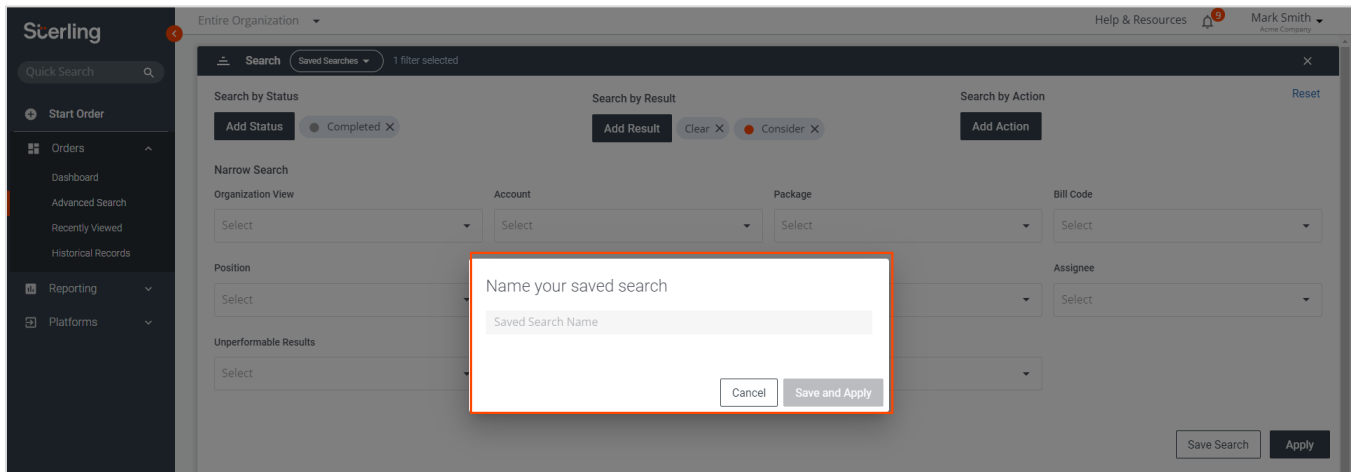
ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
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1801811756	Goodman, Sarah	Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
1801804133	Peterson, Melissa Y.	Drafted Order	2022-09-16	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

Advanced Search: The **Advanced Search** option is found in the left navigation, under the Orders tab. This option allows you to drill down to the order/invite data that you find most relevant. Advanced Search will return data for orders that have been completed within the last 13 months.

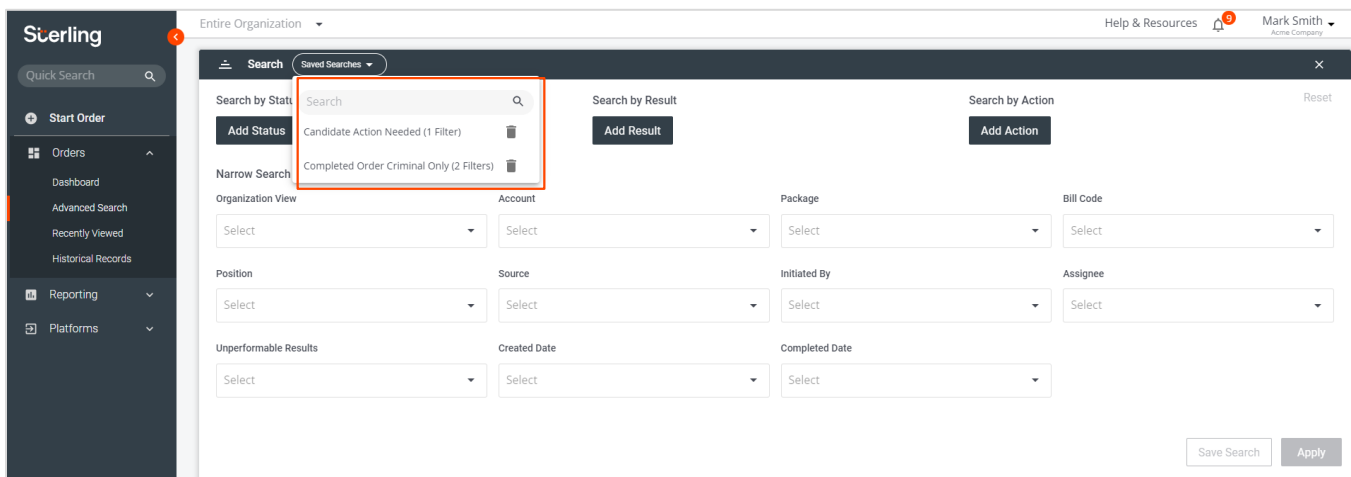
There are multiple filter options that you can use to tailor your searches, including Created Date, Completed Date, Result, Status, Package, Bill Code, etc.

Within the Advance Search function, you are also able to save filter combinations that you commonly use and return to that search later. To create a saved search, define the fields that you want to save and select **Save Search** at the bottom right.

A pop up will appear that allows you to name the search criteria that you wish to save. You can access and/or manage your saved searches by selecting the **Saved Searches** button in the top left corner. You are able to modify or delete saved searches at any time.

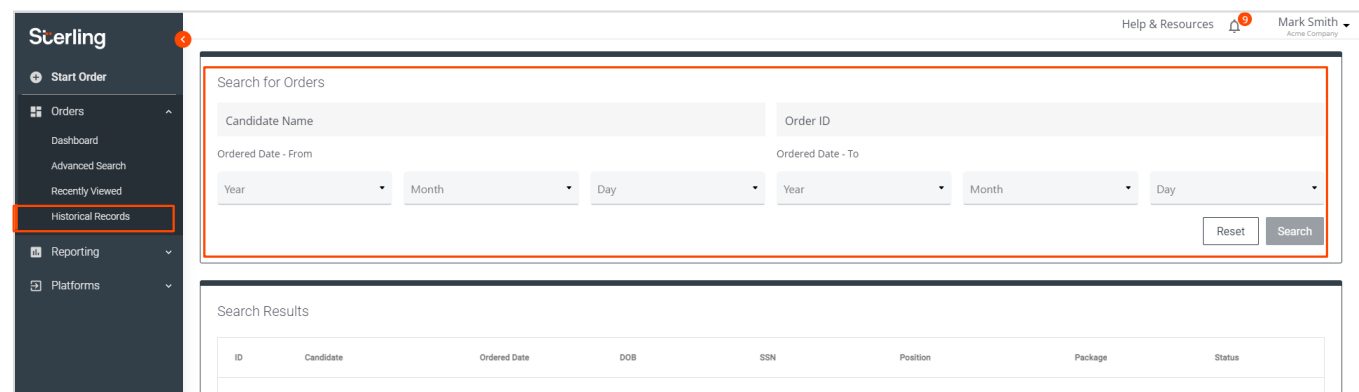


If you want to access saved searches, click to access.



Historical Records: The **Historical Records** search option is found in the left navigation, under the Order tab. A Historical Records search will return data for all completed orders, including orders that are over 13 months old and/or orders that were completed on a legacy platform.

There are multiple filter options that you can use to tailor your search, including fields for Candidate Name, Order ID and a From and To Date range.



PLEASE NOTE The Historical Records search option will only be available to users who currently have the Archived Orders Search setting enabled within your Sterling account.

When you conduct a Historical Records search, you can filter your results by Order ID, Candidate Name, Ordered Date, and DOB. To show the filters that are available, click on the **Show Filters** button on the right-hand side of the Search Results box.

The screenshot shows the Sterling application interface. On the left is a dark sidebar with navigation links: Start Order, Orders (with sub-links for Dashboard, Advanced Search, Recently Viewed, and Historical Records), Onboarding, I-9 Form I-9, Reporting, and Platforms. The main content area is titled 'Search for Orders' and contains search filters for Candidate Name, Order ID, and Ordered Date (From and To). Below the filters is a 'Search Results' section. A red box highlights the 'Show Filters' button in the top right corner of the Search Results section. The table below shows two results:

ID	Candidate	Ordered Date	DOB	SSN	Position	Package	Status
18018...	Stewart, Jack I	2022-10-18	XXXX-07-09	XXX-XX-2233	Standard Employee	Standard Criminal	Archive
18018...	Jones, Sally J	2022-10-18	XXXX-07-09	XXX-XX-4432	Standard Employee	Standard Criminal	Archive

You are also able to order and view the search filter fields based on your preference.

This screenshot shows the same Sterling application interface, but with the 'Hide Filters' button highlighted in the top right corner of the Search Results section. A dropdown menu is open for the DOB column, showing options: 'In range', 'yyyy-mm-dd', and 'yyyy-mm-dd'. The table below shows four results:

ID	Candidate	Ordered Date	DOB	SSN	Position	Package	Status
18018...	Stewart, Jack I	2022-10-18	XXXX-07-09	XXX-XX-2233	Standard Employee	Standard Criminal	Archive
18018...	Jones, Sally J	2022-10-18	XXXX-07-09	XXX-XX-4432	Standard Employee	Standard Criminal	Archive
18018...	Jones, Bob D	2022-10-06	XXXX-07-09	XXX-XX-7744	Standard Employee	Standard Criminal	Archive
18018...	Smith, Sam D	2022-10-06	XXXX-08-07	XXX-XX-7738	Standard Employee	Standard Criminal	Archive

Clicking on a search result will show a preview of the selected order. Once in the preview screen, you have the option to download the completed report, any attachments (if applicable) and any order notes (if applicable) with one click.

Sterling

[Start Order](#)

Orders

[Dashboard](#)
[Advanced Search](#)
[Recently Viewed](#)
[Historical Records](#)

Reporting

[Platforms](#)

Search for Orders

Candidate Name

Order ID

Ordered Date - From

Year 2021 Month January Day 1

Ordered Date - To

Year 2023

Search Results

ID	Candidate	Ordered Date	DOB	SSN	Position
18018...	Stewart, Jack I	2022-10-18	XXXX-07-09	XXX-XX-2233	Standard
18018...	Jones, Sally J	2022-10-18	XXXX-07-09	XXX-XX-4432	Standard
18018...	Jones, Bob D	2022-10-06	XXXX-08-14	XXX-XX-7744	Standard
18018...	Smith, Sam D	2022-10-06	XXXX-08-07	XXX-XX-7738	Standard
18018...	Goodman, Sarah	2022-09-28	XXXX-01-01	XXX-XX-2350	Standard
18017...	Jones, Jessica J	2022-08-16	XXXX-01-01	XXX-XX-1111	Standard

Goodman, Sarah #1801811756

Download This Report

Order # 1801811756 Goodman, Sarah

Order Status: Complete

Order Result: **CONSIDER**

1 (800) 880-5248

(646) 829-3382

dispute.resolution@sterlingcheck.com

Confidential Background Screening Report

Important Disclosures

Pursuant to Minn. Stat. Ann. 332.70(4): The report may include information that has been expunged, sealed, or has otherwise become inaccessible to the public since the date it was collected.

This report or portions of this report may have been rated or scored pursuant to criteria provided by the end-user. The rating is merely to ease the reviewer(s) review of the report and does not indicate that any employment decision has been made. Regardless of any rating applied by Sterling based on the end-user's criteria, the end-user must review all reports to conduct a case-by-case individualized analysis before making any decision.

References to a specific "Level" in the Result Column or as indicated in a Component Title are based solely on an end-user's criteria and do not refer to any label used by any sex offender registry, government agency, or public record repository.

Sterling provides the information contained in this report to End-User to be used solely for a permissible purpose as defined in the Fair Credit Reporting Act. If the End-User intends to take adverse action based in whole or in part on the contents of this report, the End-User must provide the consumer with notices that it is taking adverse action and those notices must comply with the FCRA and state law. All information contained in this report is provided pursuant to the terms of the End-User Agreement. End-User further understands that it uses any and all information provided by Sterling at its own risk and End-User is solely liable for complying with all federal, state, and local laws. The information contained in this report is confidential and may only be accessed by authorized employees of End-User, provided to the consumer about who it relates, or provided as otherwise required by law.

The scope of the criminal history search is governed by state and federal reporting restrictions and client request. Generally, records will be reported for 7 years. Due to state and federal reporting guidelines for consumer reporting agencies, records may or may not exist that may not be reported.

U.S. Specific Features

If you hire within the U.S., some additional services and features may appear within the Client Hub and be relevant to your screening program, including:

Adverse Action Process Feature: If you have the Adverse Action feature enabled, you'll see an additional tile in the order pipeline. Clicking the **Adverse Action Process** tile will display all orders that have had Adverse Action, Fair Chance, and/or Individualized Assessment initiated and also orders where a Dispute has been opened. Within this view, you will be able to drill down and see additional Adverse Action status information:

- **Pre-Adverse Action Sent:** The pre-adverse action notice has been set to the candidate.
- **Adverse Action Paused:** The adverse action process is paused and will not resume without action from you.
- **Adverse Action Sent:** Final notice has been sent to the candidate.
- **Dispute:** Candidate has reached out and a dispute is in progress.

For more details, download the [Adverse Action User Guide](#).

Sterling Quick Search Start Order Orders Dashboard Advanced Search Recently Viewed Historical Records Onboarding I-9 Form I-9 Reporting Platforms	Entire Organization									
	3 Started 3 In Progress 1 Action Needed 4 Ready for Review 16 Adverse Action Process Completed									
	<input type="checkbox"/>	ID	Candidate	Status / Result	Created	Assignee	Client Status	Completed / ETA	Account	Package
	<input type="checkbox"/>	1493496	Smith, Pete	● Invite Sent	2023-01-04	Smith, Mark			Acme Company	Standard Criminal
	<input type="checkbox"/>	1801811756	Goodman, Sarah	● Consider	2022-09-28	Smith, Mark		2022-09-28	Acme Company	Standard Criminal
	<input type="checkbox"/>	1801804133	Peterson, Melissa Y.	● Drafted Order	2022-09-16	Smith, Mark			Acme Company	Standard Criminal
	<input type="checkbox"/>	1801796343	Martens, Terri L.	● Action Needed	2022-09-07	Smith, Mark		2022-09-12	Acme Company	ID Profile
	<input type="checkbox"/>	1801795950	Durbin, Scott A.	● Clear	2022-09-06	Smith, Mark		2022-10-19	Acme Company	Standard + EMP Package
	<input type="checkbox"/>	1801769978	Smith, Cole D.	● Pending	2022-08-16	Smith, Mark		2022-08-19	Acme Company	Standard Criminal
	<input type="checkbox"/>	1801769572	Jones, Jessica J.	● Adverse Action Sent	2022-08-16	Smith, Mark		2022-10-21	Acme Company	Standard Criminal

In addition, other services may appear in the left-hand navigation if you are hiring within the US, including:

- **Onboarding Services:** If your Sterling account is configured for Onboarding services, clicking on **Onboarding** will take you to the Sterling Onboarding view.
- **Form I-9 Services:** If your Sterling account is configured for Form I-9/E-Verify services, clicking **Form I-9** will take you to the Sterling I-9 view. For more details, download the [Sterling I-9 User Guide](#).