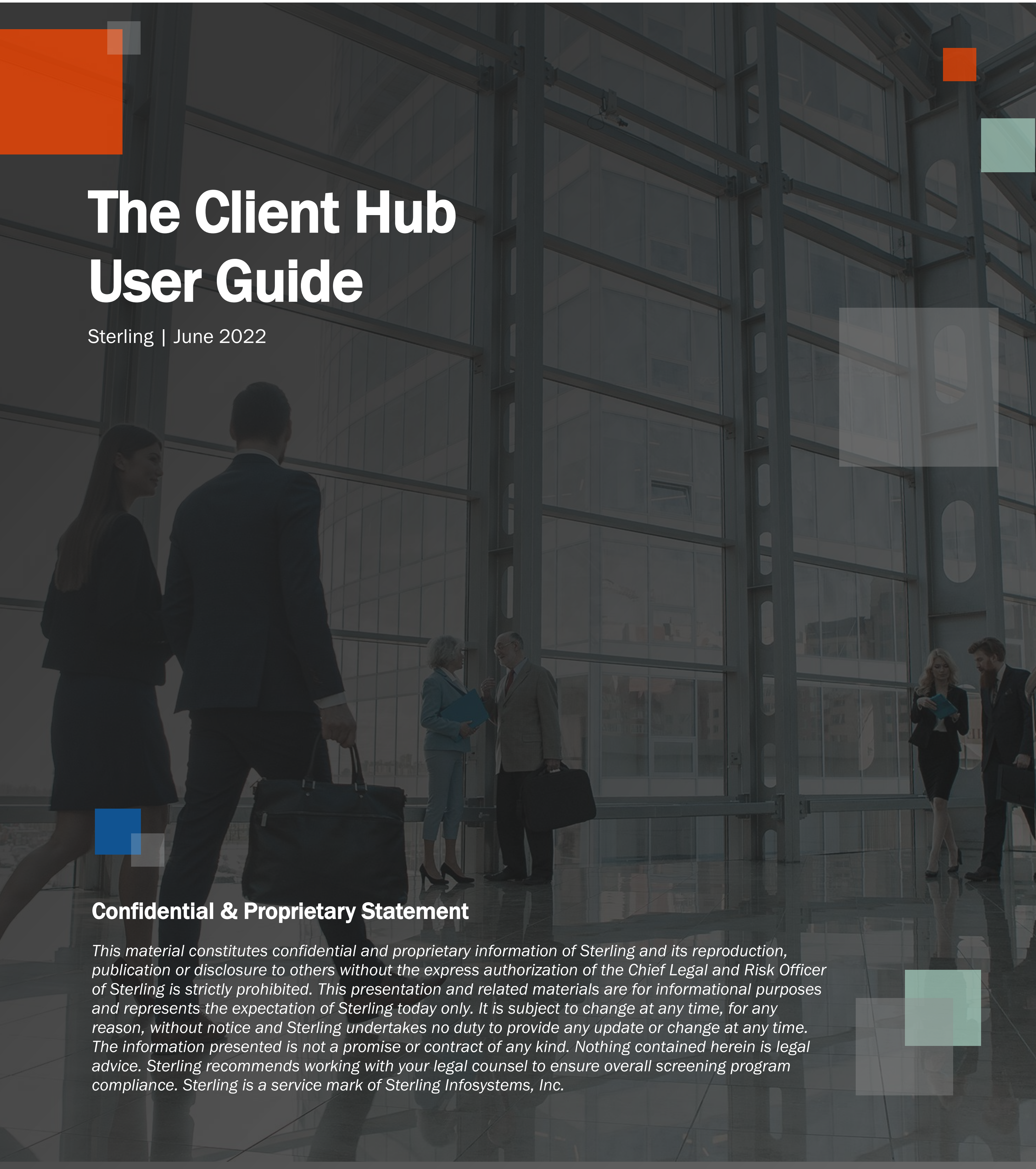


The Client Hub User Guide

Sterling | June 2022

Confidential & Proprietary Statement

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

Introducing Client Hub – powered by Sterling, designed to make your life easier and 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. 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 is redefining the 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

Table of Contents

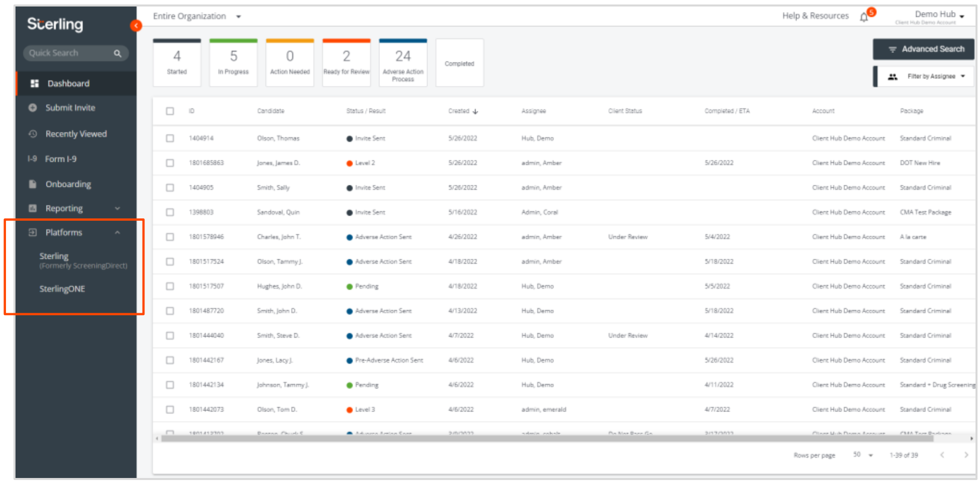
Accessing Client Hub

Easily toggle between new and existing experiences

Once you log in using your login credentials, you will automatically be directed to Client Hub.

Please note that you can toggle back to your existing SterlingONE experience via the left-hand navigation.

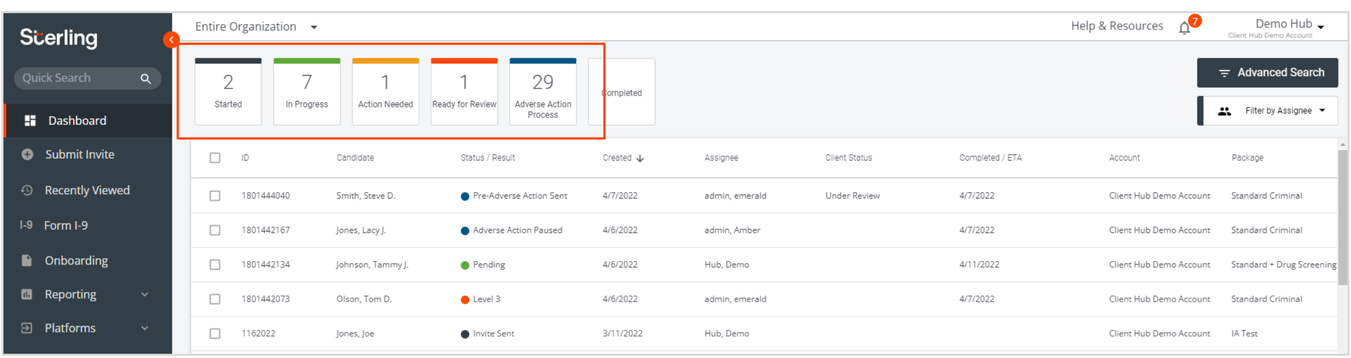
If you are in SterlingONE and would like to return to the Client Hub, simply click the Access Now button via the top banner.



Client Hub Dashboard View

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

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



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 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 Orders:** 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 orders that have any open requests that require additional information from either the candidate or yourself for the order 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:

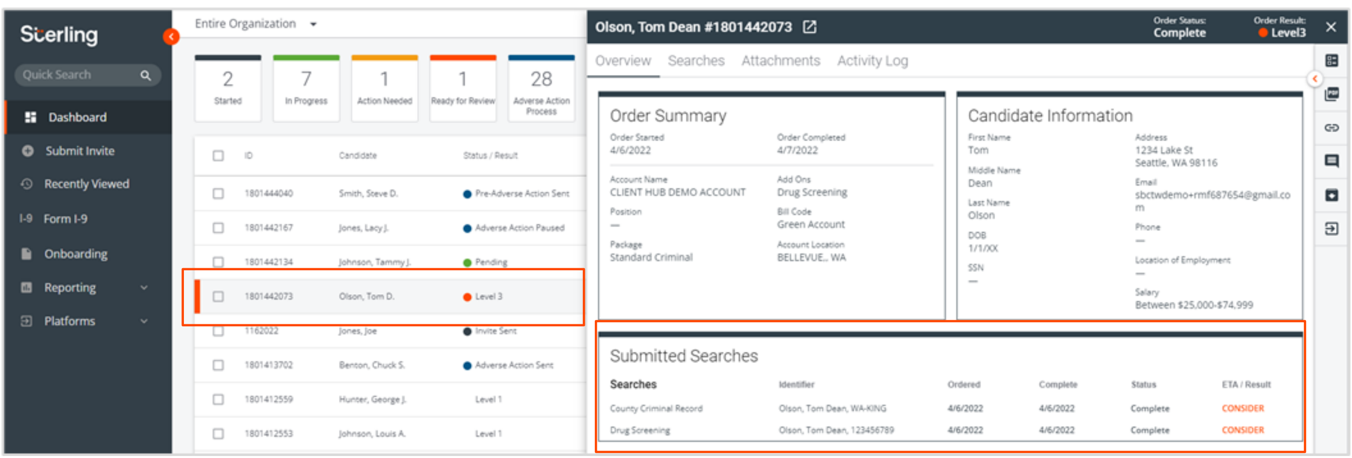
- **Consider:** Fulfillment is complete, and one or more findings were listed.

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.



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

- 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.

Adverse Action Process: 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:

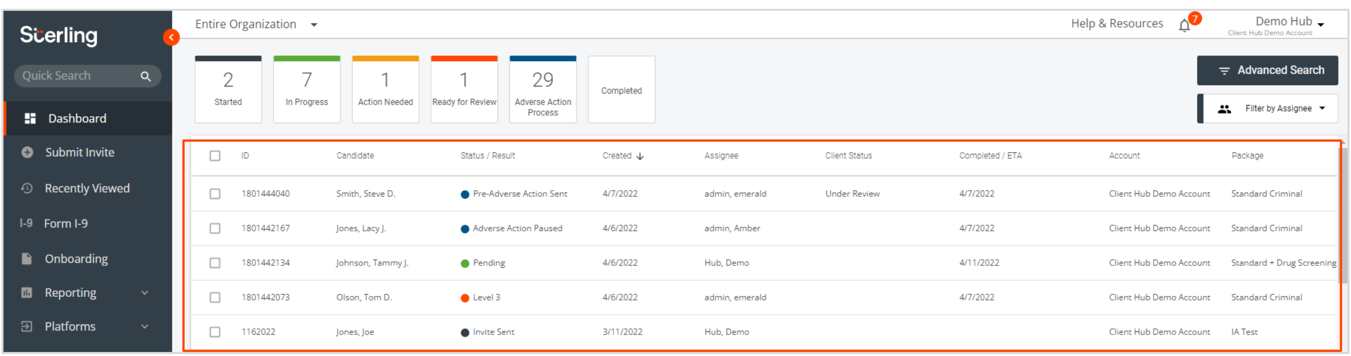
- **Pre-Adverse Action Sent:** The pre-adverse action notice has been set to the candidate.
- **Adverse Action Paused:** The adverse action process is paused and will not resume without action from you.
- **Adverse Action Sent:** Final notice has been sent to the candidate.

- **Dispute:** Candidate has reached out and a dispute is in progress.

Completed: Clicking on the Completed tile will display orders that are completed and have an order level result of Clear, Pass, or Level 1. Any Archived Orders, Expired Invites, Canceled Invites, and Archived Invites are also displayed under the Completed tile view. The results shown will vary depending on your account configuration, as indicated below:

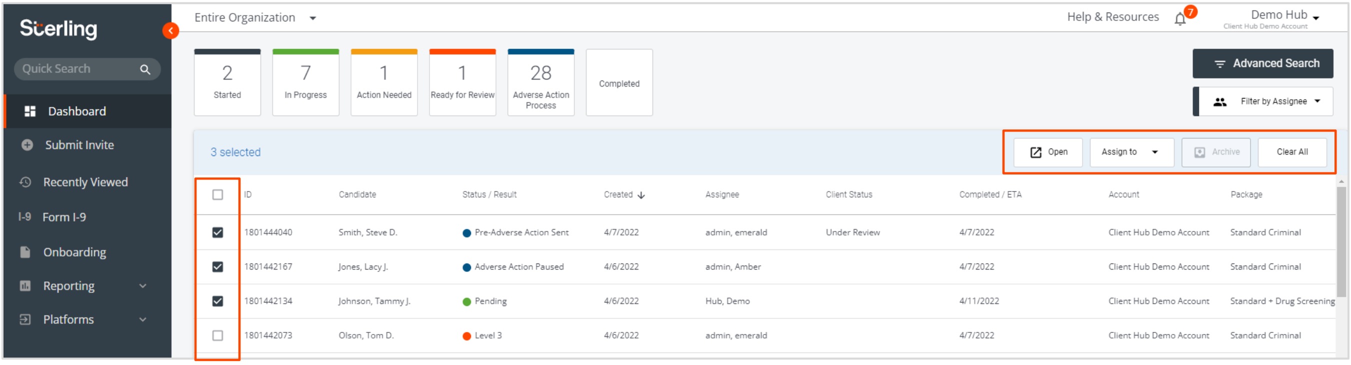
- **Clear:** Fulfillment is complete and order level results is Clear.
- **Pass:** Fulfillment is complete and order level result is Pass
- **Level 1:** Fulfillment is complete and order level result is Level 1
- **Archived Orders:** Completed order from the last 13 months that has been moved into the Archived state.
- **Expired Invites**: Submitted invites that are over 30 days old with no completed data entry.
- **Canceled Invites:** Invites that you have chosen to cancel (previously known as "deleted".
- **Archived Invites:** Any completed invite that has turned into an order.

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 Name, Created, Assignee, Account, and Package.



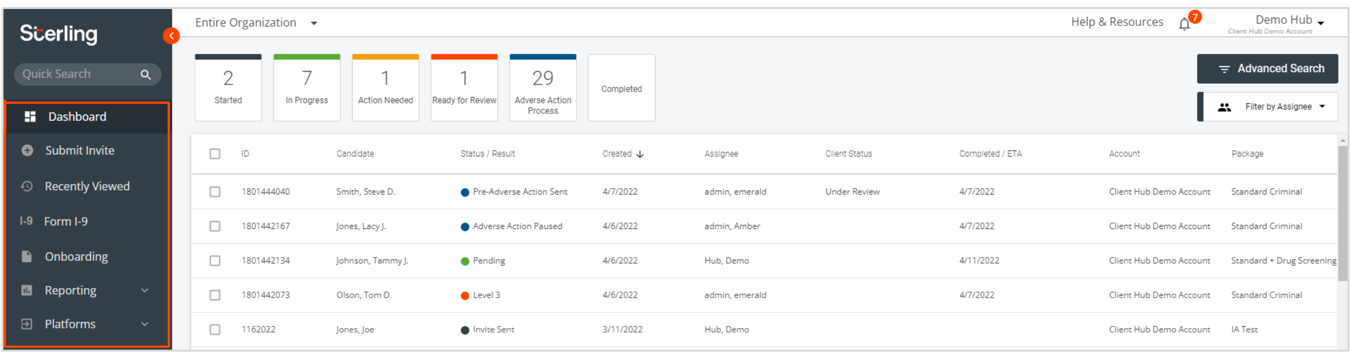
If you want to make a bulk action, you can select the checkbox next to any corresponding invite/order, and four buttons will appear at the top of the screen that give you the option to bulk open, archive, assign, and/or unassign the selected items.

- **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.



Left Navigation Options

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



Dashboard: Clicking the Dashboard tab will reset any filters and/or other sorting criteria that had been previously selected in the order grid. Clicking this tab will also return you to the main Dashboard view, if you have been working in another tab.

Submit Invite: Clicking Submit Invite will allow you to create a new background screening invite. This process supports the creation of a single or bulk invite upload.

Recently Viewed: Clicking Recently Viewed will allow you to see the last 15 invites/orders that you have viewed in a central view.

Form I-9: If your Sterling account is configured for Form I-9/E-Verify services with Sterling, clicking Form I-9 will take you to the Sterling I-9 view.

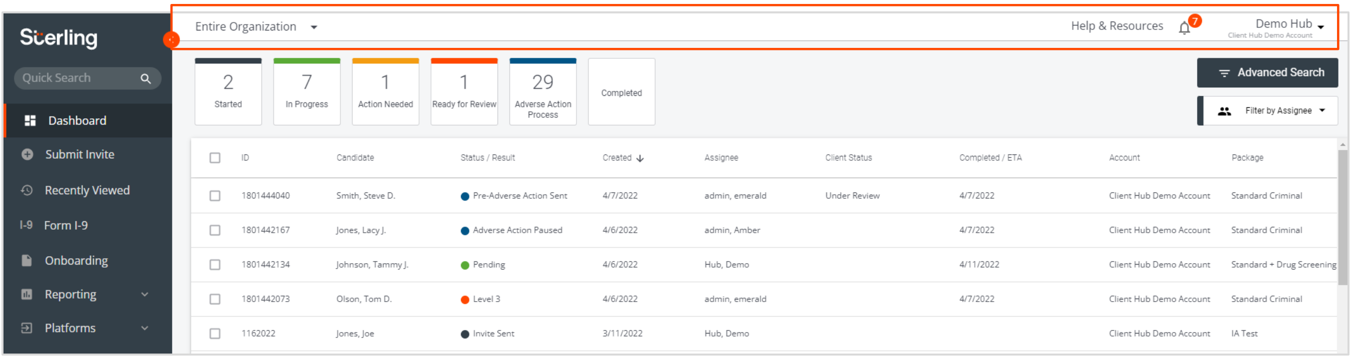
Onboarding: If your Sterling account is configured for Onboarding services, clicking on Onboarding will take you to the Sterling Onboarding view.

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.

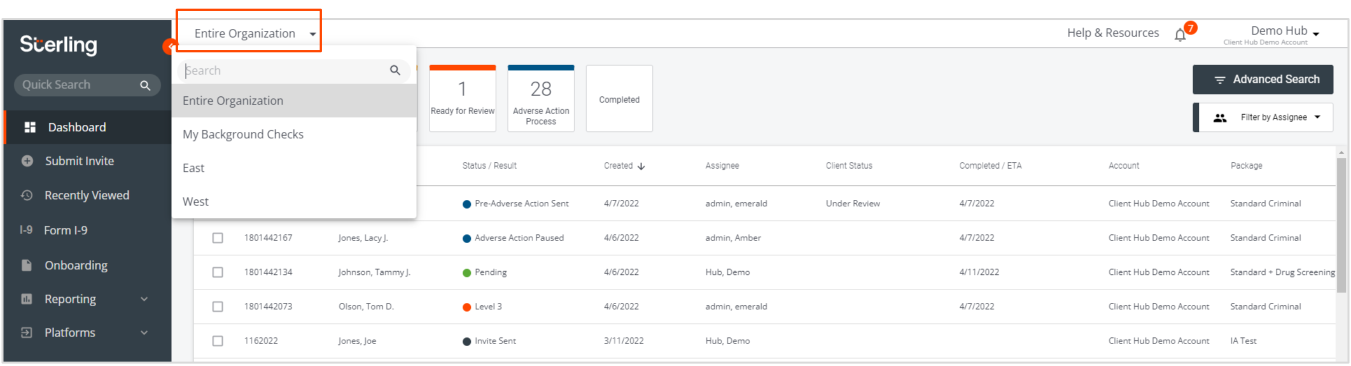
Platforms: If your Sterling account has recently been upgraded to Client Hub, clicking Platforms will allow you to access your previous Sterling account interface.

Top Navigation Options

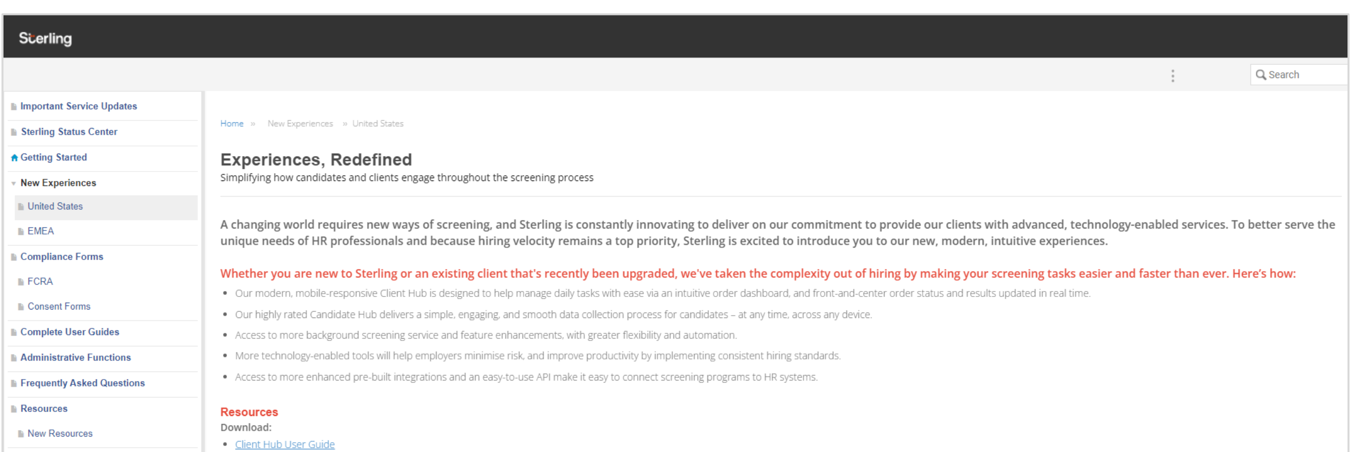
Above the main Dashboard, you will see navigation options select different organization views, access Help & Resources, view system Alerts, and access your user Account Dashboard. with drop-down selections.



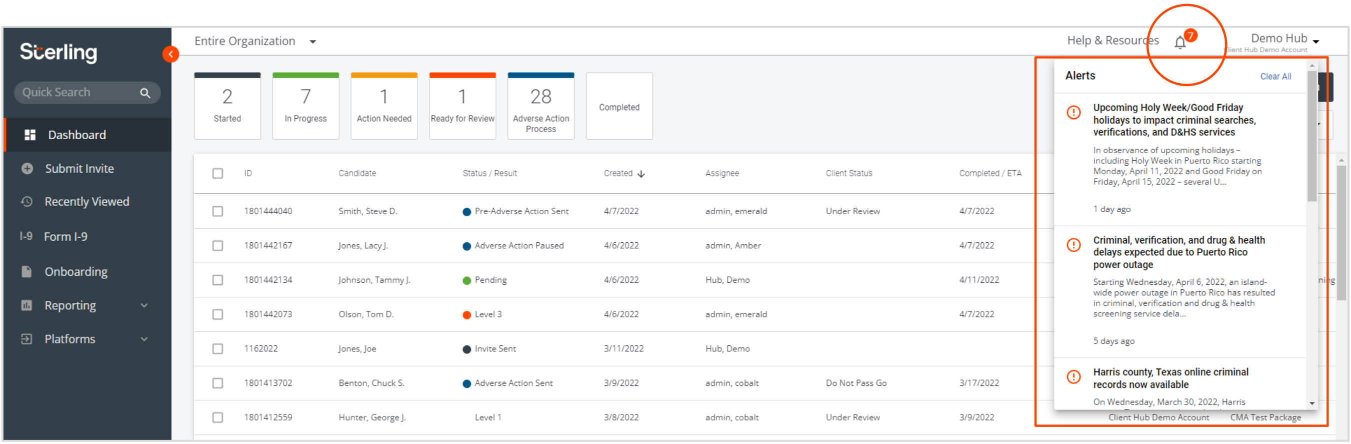
View Organization: The View Organization feature allows users to access customized views that have been set up within their organization for order and invites. Based on your access level, you will also have default views configured. For example, if you are set up as a super user, you will have access 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.



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

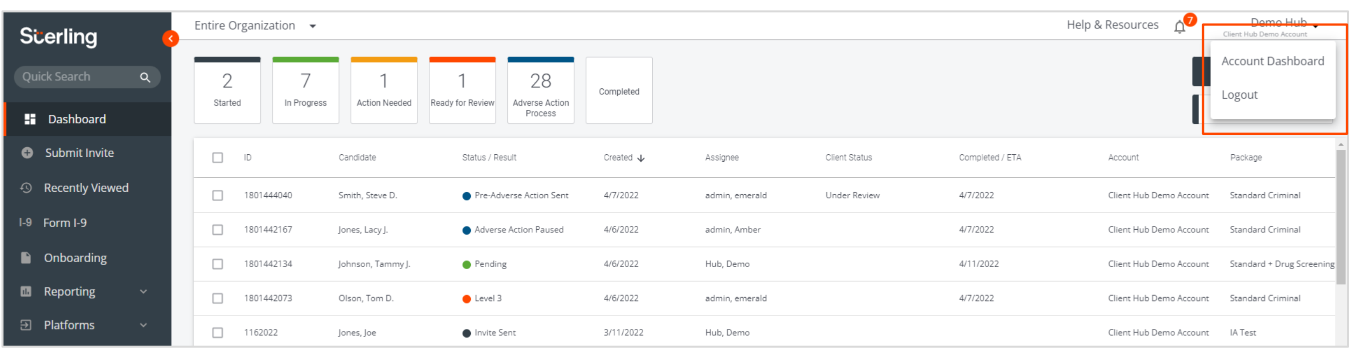


Alert Notifications Icon: The Alert Notification Icon allows you to conveniently review system alerts and important updates without having to leave your dashboard. The alert icon drop down includes notifications from the screeningdirect.info site, as well as new assignments from the Assignee function. 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” icon located on the top right of the drop down, all notifications will be removed.



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.

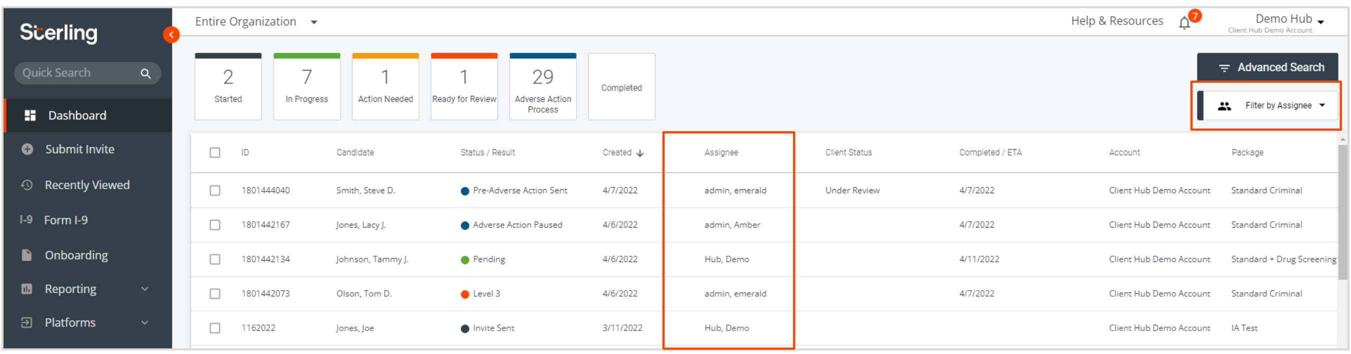


Case Management

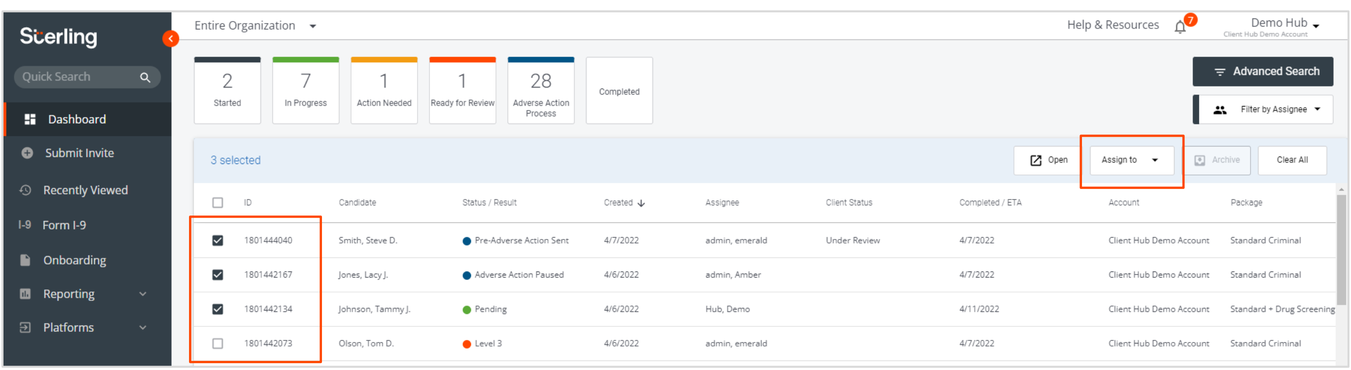
The Case Management feature allows you to conveniently assign, unassign and reassign orders within the Client Hub.

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 configurated to auto-assign an invite/order to the user who created it. The designation "unassigned" will show for any unassigned orders or invites.

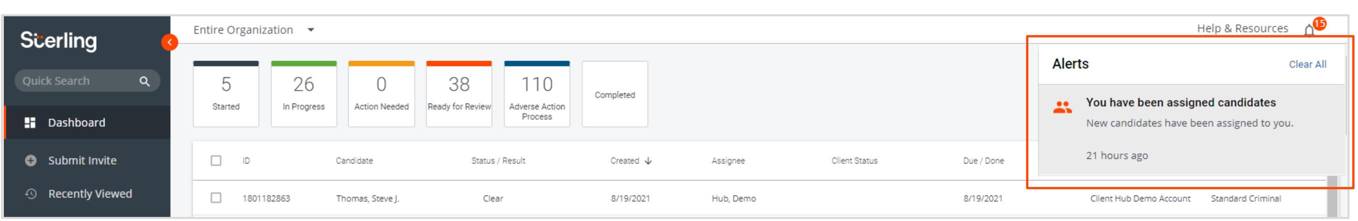
If you click on the Filter by Assignee drop down, you can select yourself or another member of your team, view that individual's assigned orders/invites, and assign items to yourself or other users. This drop down also contains the option to filter by "unassigned" orders/invites.



The 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.



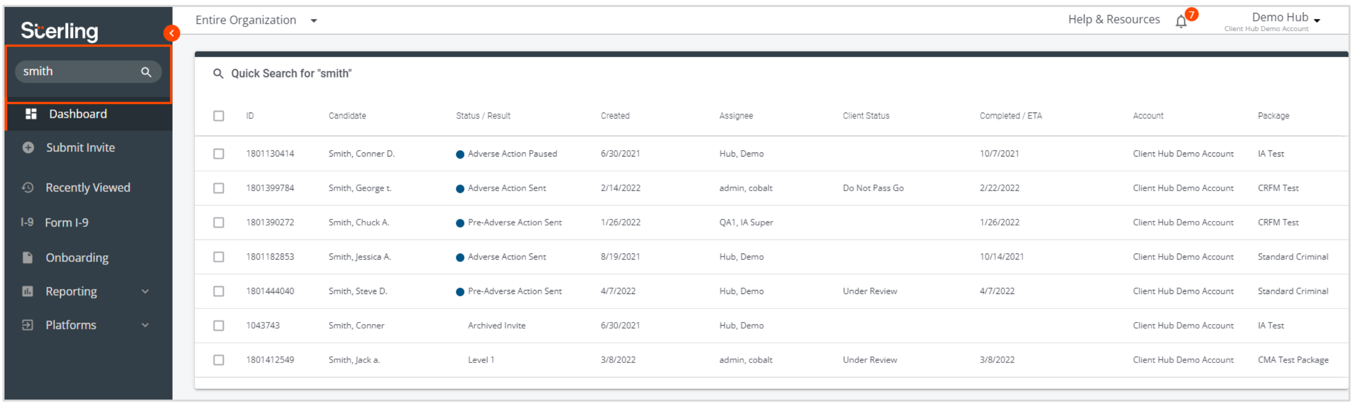
As assignments are made, alert notifications will become visible under the Alerts Notification Icon.



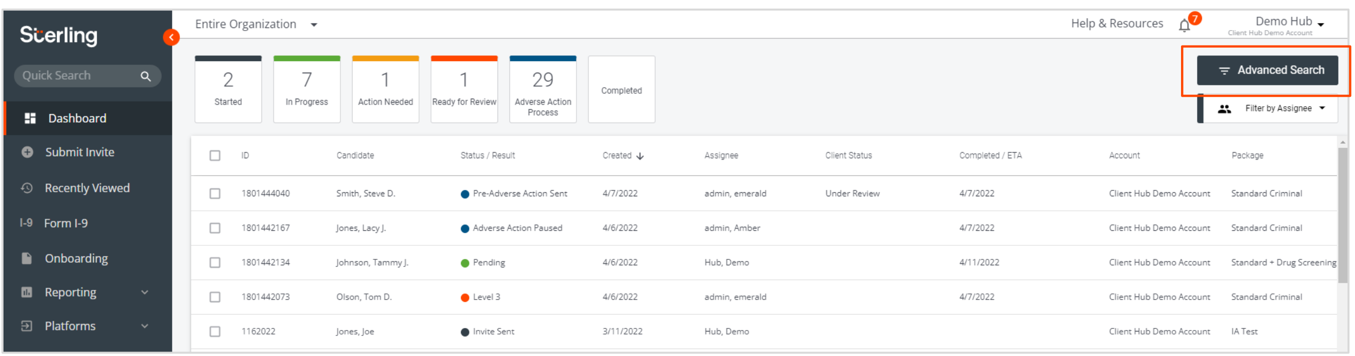
Search Options

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

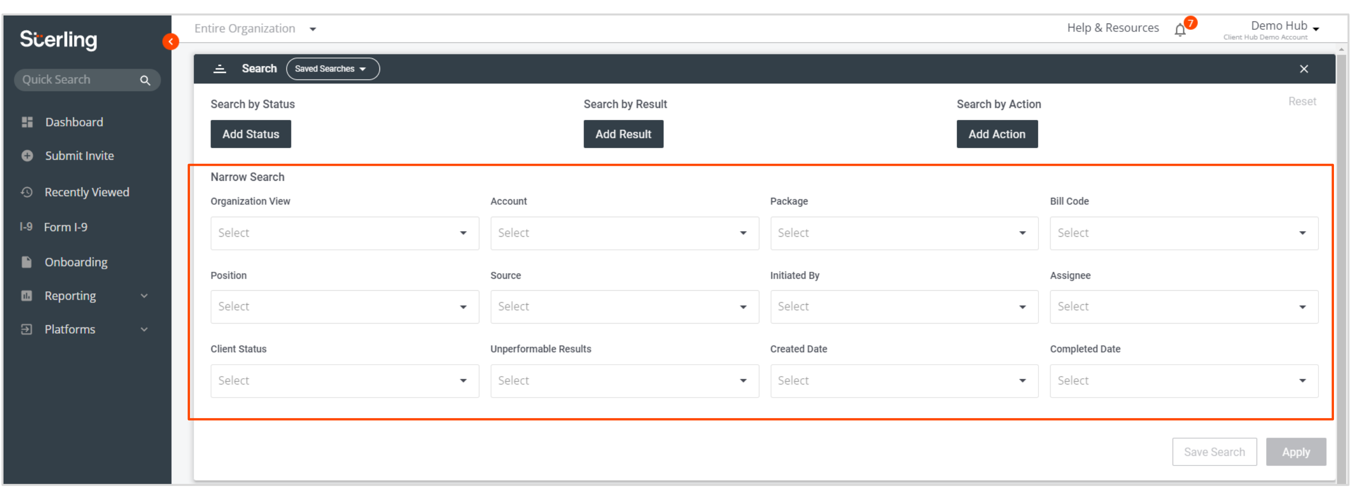
Quick Search: When using the Quick Search bar above the left navigation options, you can search for a candidate quickly by first name, last name, order ID or invite ID. Once on the Quick Search view, you can browse a candidate's Order/Invite Manager to perform any necessary actions.



Advanced Search: The Advanced Search option is found on the top right of the Client Hub dashboard and allows you to drill down to the order/invite data that you find most relevant.

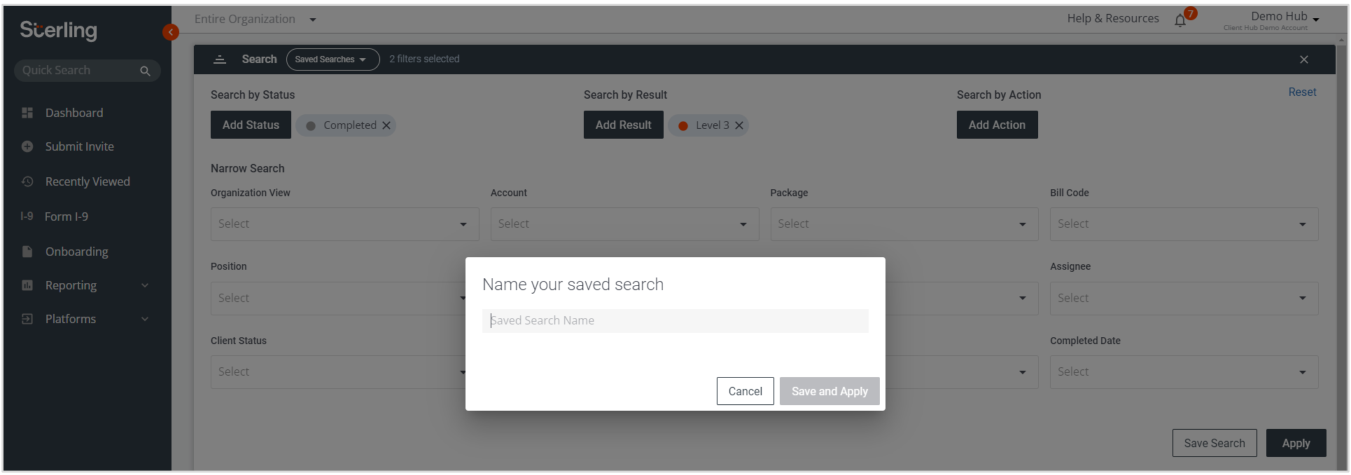


There are multiple filter options that you can use to tailor your searches, including Created Date, Completed Date, Result, Status, Package, Bill Code, etc.



Within the Advance Search function, you are also able to save combinations of filters that you commonly use and return to that search later. To create a saved search, defined 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.



Translation of Terms

If helpful, below you'll find a quick translation of SterlingONE vs. Client Hub terms.

SterlingONE Terms	Client Hub Terms
Dashboard: A web-based user interface to submit orders with additional tabs to manage all hiring activities for candidates and new hires.	**Order Dashboard.** Our modern, mobile-responsive Client Hub is designed to help manage daily tasks with ease, via an intuitive order dashboard, and front-and-center real-time order status and results.
Launch: Launching an order requires that you, as the client, complete the required data entry for your candidate in order to run a report.	**Single Invite.** We highly recommend that you use the Start Order feature that allows you to easily and quickly submit an invite by adding a candidates First name, Last name, and Email address.
Ticketing: Tickets are sent to candidates to complete the required data entry electronically, versus you needing to complete it via the launch process.	**Start Order.** The Start Order option found on the left navigation will allow you to submit an invite that will direct candidates to Sterling's highly rated, engaging Candidate Hub.
Candidate Profile: Consolidated view that houses all screenings, ticket history, and documents for a single candidate.	**Order Manager.** With Order Manager, you can review, action, and manage candidate results from a centralized tool throughout the screening journey. There's also a convenient right hand-nav, and an Attachments tab that allows you to easily attach documents to orders and/or specific searches.
Report ID: This is a unique number associated to each candidate report. A candidate could have multiple reports within their candidate profile.	**Order ID.** Order ID is a unique number associated with each candidate report. When using the new Quick Search functionality on the top left of the navigation you can now search for a candidate by order ID.
EDA: Electronic Disclosure and Authorization, Sterling offers an electronic consent process as an alternative to a paper consent process signed by the candidate.	**Electronic Consent Forms.** The candidate is taken through a series of digital consent forms, including disclosure of authorization that's required to begin their background screening process.
Candidate portal: Online branded portal for candidates and new hires to interact with your organization.	**Candidate Hub**. Our highly rated Candidate Hub delivers a simple, engaging, and smooth data collection process for candidates – at any time, across any device.
SterlingONE Admin: Robust customization tools empower you to manage the branding, messaging, and media assets of the candidate portal, as well as set up user permissions, email template groups, and more.	**Client Hub Admin**. As an admin, you'll find a permission-based hub that allows you to easily view orders that are relevant to you. You can also conveniently review alerts and updates without ever having to leave your dashboard.
Parent User: The administrator on the account who is authorized to add users, view billing and Invoices, and approve changes to the account. There is only one true parent user, however additional users may be given parent level access.	**Super User.** Super users have access to all orders and invites under their organization and will default to the Entire Organization in the drop down. If a user is set-up as a non-super user, their default view will only show orders that a user has as initiated themselves and will see My Background Checks in the drop down.