A background image of a woman with curly hair, wearing a light blue jacket over a red and white striped shirt, looking down at a screen. The image is dimmed and has several semi-transparent colored squares (orange, grey) overlaid on it.

# Sterling Onboarding in the Client Hub

August 2022 | User Guide Supplement

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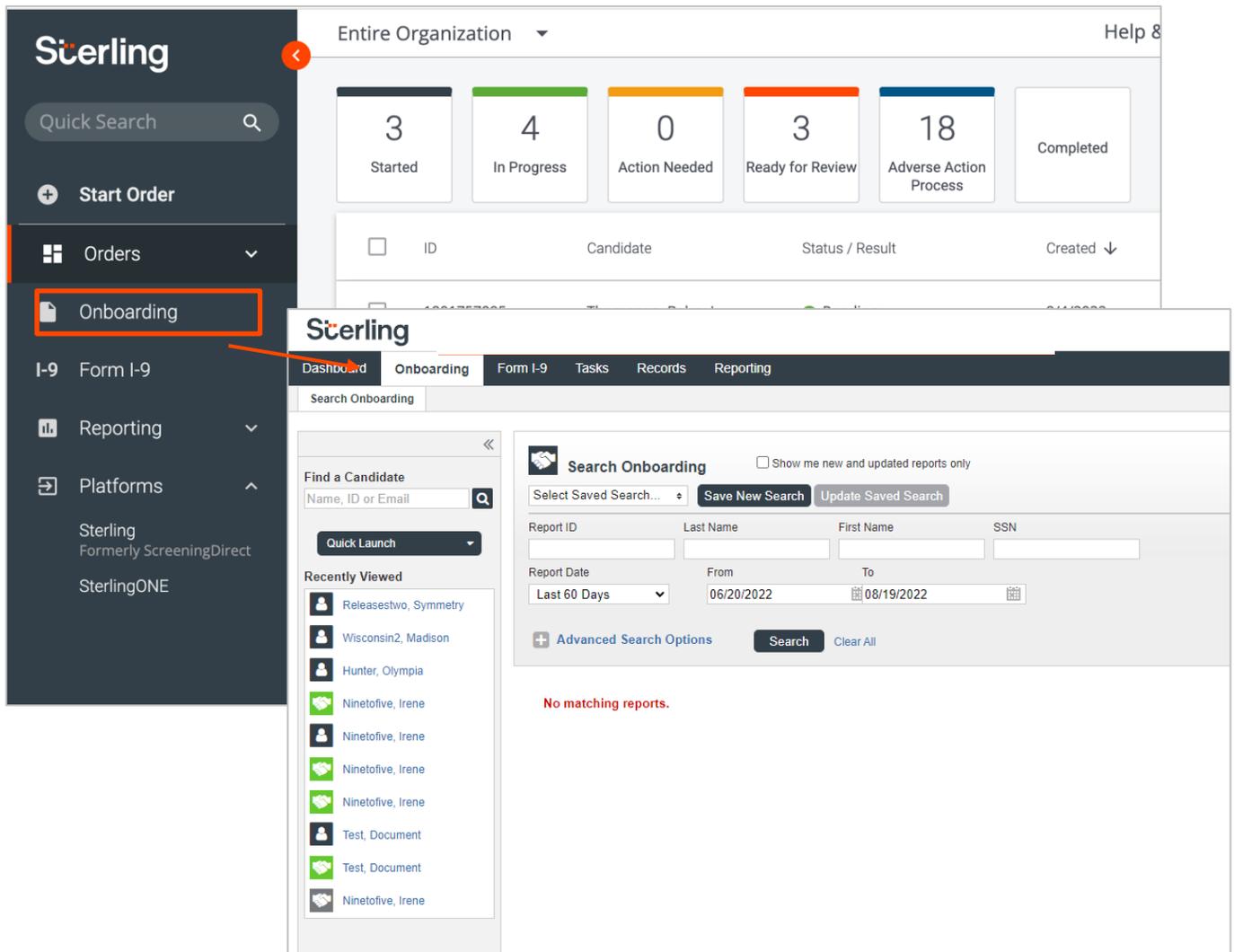
## Client Hub & Onboarding Experience

This simple guide supports you in using Sterling’s Client Hub experience to manage onboarding tasks via Sterling’s Onboarding service for standard and custom forms completion. Onboarding form orders, workflows, and form completion will continue to be fulfilled in SterlingONE; however, we offer convenient one-click access within Client Hub.

### Accessing Onboarding

Onboarding is easily accessible from a variety of places, three of these are described here:

1. Use the left navigation bar in Client Hub to find **Onboarding**. This link will take you to the Onboarding main page.



- Use the left navigation bar in Client Hub to find **SterlingONE** under the **Platforms** menu. This link will take you to the SterlingONE dashboard to access Onboarding.

The screenshot displays the Sterling Client Hub interface. On the left is a dark navigation sidebar with the Sterling logo at the top. Below the logo is a 'Quick Search' bar and a '+ Start Order' button. The main menu items are: 'Orders' (with a dropdown arrow), 'Onboarding', 'I-9 Form I-9', 'Reporting' (with a dropdown arrow), and 'Platforms' (with an upward arrow). Under the 'Platforms' menu, 'Sterling Formerly ScreeningDirect' and 'SterlingONE' are listed. The 'SterlingONE' link is highlighted with a red box, and a red arrow points from it to the SterlingONE dashboard below.

The SterlingONE dashboard is shown below the navigation menu. It features a top navigation bar with 'Dashboard', 'Onboarding', 'Form I-9', 'Tasks', 'Records', and 'Reporting'. A yellow banner at the top of the dashboard reads: 'Consider changing your password! Your password will expire in less than 24 hours. Click here to change your password.' Below this banner are three main sections: 'Find a Candidate', 'Recent Activity', and 'My Tasks'. The 'Recent Activity' section shows a list of events such as 'New Candidate', 'New Position', and 'Electronic Form I-9'. The 'My Tasks' section lists tasks with due dates and status indicators like 'Overdue' and 'View'. Below these sections is an 'Upcoming Due Dates' table with columns for Task Description, Candidate, Assigned to, Status, and Due. The 'Onboarding' section at the bottom shows a card for 'E-Verify Electronic I-9 (650)' with a price of \$14.95 and a 'Launch' button.

- To access **Order Manager** click on the person or order in Client Hub and this will initiate the **Order Manager** flyout. While viewing the **Order Manager** in Client Hub, click on the **Manage Onboarding** option. This will take you directly to that candidate's profile page. If the candidate doesn't have an existing profile, clicking this link will auto-create the profile using information from the Client Hub.

The screenshot shows the Sterling Onboarding interface. On the left is a navigation sidebar with options like 'Start Order', 'Orders', 'Dashboard', 'Advanced Search', 'Recently Viewed', 'Onboarding', 'Form I-9', 'Reporting', and 'Platforms'. The main area displays a table of candidates with columns for ID, Candidate Name, Result, and Order ID. The candidate 'Green, Linda J.' with ID 1801413706 is highlighted with a red box. An arrow points from this box to a detailed profile view on the right. The profile view includes sections for 'Important Disclosures' (showing a 'County Court Search—Green, Linda Jean, WA-KING' with a 'CONSIDER' result), 'Data as Provided' (personal information like name, SSN, DOB, race, gender, and jurisdiction), and 'Verified Data' (report details like date, case number, and charges). A right-side navigation menu is visible, with 'I-9' highlighted by a red box and an arrow pointing to the next section.

**Close-up of expanded section not seen above**

This is a close-up of the candidate profile page for Linda Jean Green. The top header shows 'Green, Linda Jean #1801413706' and 'Order Status: Complete' with 'Order Result: Level3'. Below the header are tabs for 'Overview', 'Searches', 'Attachments', and 'Activity Log'. The main content area includes a disclaimer: '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.' Below this is the 'Client Status: Move to next step' and a section for 'Important Disclosures' with a highlighted entry for 'County Court Search—Green, Linda Jean, WA-KING'. At the bottom, there are two columns: 'Data as Provided' and 'Verified Data'. On the right side, a navigation menu is expanded, showing options: 'Client Matrix', 'I-9 Manage I-9' (highlighted with a red box), 'Manage Onboarding', 'Export', 'Copy Link', 'Report Comments', and 'Archive'.

## Ordering & Viewing Onboarding Forms

### Submitting Onboarding Orders

The Onboarding ordering process remains unchanged from your past experience. Use the **Launch Onboarding** buttons to order Onboarding packages.

Please Note: The Client Hub integration with Onboarding services allows for candidates to be managed inside Client Hub (adding, updating, etc.) Clicking through the candidate record in Client Hub will allow for sharing of the candidate's biographical data (i.e., name, email, etc.) for purposes of ordering Onboarding.

The screenshot shows the Sterling Onboarding dashboard. A 'Find a Candidate' modal is open, displaying a search bar and a 'Quick Launch' dropdown menu. The 'Launch Onboarding' option is highlighted with a red box. The dashboard includes sections for 'Recent Activity', 'My Tasks', and 'Onboarding' packages.

Task	Assigned to	Status	Due
Correct and Sign Form I-9	Correctionthree, Anita Beula		
Complete and Sign Form I-9	Doodle, Yankee		
Correct and Sign Section 2	Cook, David	Overdue - New	Jul 30 '21
Complete and Sign Section 2	Doodle, Yankee	Overdue	Sep 4 '21
Corrective, Anita			
Complete and Sign Section 2	Correctionthree, Anita Beula	Overdue	Sep 15 '21
Corrective, Anita Beula			
Complete and Sign Section 2	Ninetofive, Irene	Overdue	Sep 16 '21
David Cook Candidate	David Cook	Overdue - New	Jul 27 '21
Joehua Hill Verifier	Joehua Hill	Pending	Jul 30 '21
Anita Correction Candidate	Anita Correction	In Progress	Sep 1 '21
Anita Correctionthree Candidate	Anita Correctionthree	Expired - Pending Client Review	Sep 1 '21
Yankee Doodle Candidate	Yankee Doodle	Overdue - New	Sep 1 '21

### Seamless Onboarding Workflows (if applicable)

If you are currently using positions and associated workflows in Onboarding, it is necessary to review all workflows closely to ensure they continue to meet your needs.

As part of your upgrade to the new Client Hub experience, if you have “mixed product” workflows, you should observe a change in the system behavior. **The screening-type workflows steps will be replaced with a simple "mark complete" step, which will preserve the workflow step, but only require that user indicate that this step has been completed in Client Hub.**

Search for your candidate by going to the Find a Candidate search box, and type in their name.

The screenshot shows the Sterling Onboarding dashboard. At the top, there's a navigation bar with 'Dashboard', 'Onboarding', 'Form I-9', 'Tasks', 'Records', and 'Reporting'. A yellow notification banner at the top says 'Consider changing your password? Your password will expire in less than 24 hours. Click here to change your password.' Below this, there are three main sections: 'Recent Activity', 'My Tasks', and 'Recently Viewed'. The 'Find a Candidate' search box is highlighted with a red box, containing the text 'Green'. The 'Recent Activity' section shows a list of activities, including 'New Candidate' for Green, Linda Jean, created on Aug 16. The 'My Tasks' section shows several tasks with due dates and 'Overdue' status.

Find and select your candidate from the list of search results.

The screenshot shows the 'Search Candidates' page. The navigation bar includes 'Candidates', 'Positions', and 'Documents'. The 'Find a Candidate' search box is at the top left. Below it, there's a 'Search Candidates' section with filters for 'Candidate ID', 'Last Name', 'First Name', and 'SSN'. There are also filters for 'Position' and 'Date Range'. A 'Search' button is visible. Below the search filters, there's a table with one candidate listed: 'Green, Linda Jean (990444943)'. The table has columns for 'Name', 'Modified', 'Latest Status', and 'Anonymization Date'. The 'Modified' column shows 'Aug 16 12:49 PM By Sterling Talent Solutions'. There are 'Prev' and 'Next' buttons and 'Items per Page: 10 30' at the bottom.

Using the example here, this Workflow includes multiple onboarding-type and screening-type workflow steps.

The screening packages are still present in the same ordered step. However, when a workflow reaches the screening-type step, you will now need to click the **Complete Task** button as shown below.

The screenshot shows the Sterling Onboarding interface for candidate Linda Jean Green. The 'Hiring Process' section is highlighted with a red box. It contains a table with the following data:

Position	Status	Actions
New Hire - Driver	In Progress	Deactivate
Step 1: Offer Letter Test		Skip Step <input type="button" value="Launch"/>
Step 2: E-Verify Electronic I-9 (650)		Skip Step <input type="button" value="Launch"/>
Step 3: SSN Trace - Proceed to ClientHub to Fulfill This Step		Skip Step <input type="button" value="Complete Task"/>

In the Sterling Onboarding tool, you will need to acknowledge that this step should be marked as Complete.

The screenshot shows the Sterling Onboarding interface with a 'Complete Step' dialog box overlaid. The dialog box is highlighted with a red box and contains the following text:

**Complete Step**

You are about to complete the step SSN Trace for Linda Jean Green. This will mark the step as Completed, and allow the hiring process to continue. Click Confirm to proceed. Click Close to return to the previous screen without changes.

Buttons:

After marking a step as complete, the workflow will show with that step now showing as **Complete**.

The screenshot shows the Sterling Onboarding interface for candidate Linda Jean Green. The top navigation bar includes Dashboard, Onboarding, Form I-9, Tasks, Records, and Reporting. The candidate profile section displays details such as Candidate ID (990444943), Date Added (Aug 16, 2022, 12:49 PM), and various contact and identification information. Below the profile is a 'Hiring Process' table with the following steps:

Position	Status	Actions
New Hire - Driver	In Progress	Deactivate
Step 1: Offer Letter Test		Skip Step <input type="button" value="Launch"/>
Step 2: E-Verify Electronic I-9 (E90)		Skip Step <input type="button" value="Launch"/>
Step 3: SSN Trace	Complete	

Below the hiring process is an 'Onboarding History' section with an 'Add Onboarding' button. At the bottom, there are sections for Documents (0), Notes (0), and Log (1).

As necessary, you will need to take action to complete this screening step in Client Hub. You can access Client Hub by going to the blue banner at the top of your screen.

The screenshot shows the 'Search Onboarding' screen in the Sterling Onboarding interface. The top navigation bar includes Dashboard, Screen, Onboarding, Form I-9, Tasks, Drug & Health, Records, Batch Upload, and Reporting. A blue banner at the top reads: 'Access our new client experience today! Our newly simplified, modern Client Hub has an intuitive dashboard with real time order status and results. Try now!' with an 'Access Now' button. The search form includes the following fields and options:

- Search Onboarding
- Find a Candidate: Name, ID or Email
- Quick Launch
- Recently Viewed: No items have been viewed
- Search Onboarding:  Show me new and updated reports only
- Select Saved Search... | Save New Search | Update Saved Search
- Report ID, Last Name, First Name, SSN
- Report Date: Last 60 Days | From: 06/13/2022 | To: 08/12/2022
- Advanced Search Options | Search | Clear All

The search results area displays the message: **No matching reports.**