



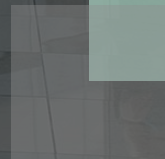

Order Manager User Guide

Sterling Platform | May 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.

Order Summary		Candidate Information	
Order Started 2022-09-28	Order Completed 2022-09-28	First Name Sarah	Address 123 First Ave Seattle, WA 98116
Account Name ACME COMPANY	Add Ons —	Middle Name —	Email SarahGoodman@sterlingcheck.com
Position —	Bill Code Blue Account	Last Name Goodman	Phone —
Package Standard Criminal	Account Location BELLEVUE, WA	DOB 1980-01-01	Location of Employment —
		SSN —	Salary Over \$75,000

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.

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

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.

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

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.

Goodman, Sarah #1801811756

Overview

Searches

Attachments

Activity Log

Order Status: Complete

Order Result: Consider

Client Matrix

Export

Copy Link

Report Comments

Archive

Order Summary

Order Started

2022-09-28

Order Completed

2022-09-28

Account Name

ACME COMPANY

Add Ons

—

Position

—

Package

Standard Criminal

Bill Code

Blue Account

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

[<< return to summary](#)


Background Checks: Complete

Summary New

Detail New

Summary Classic

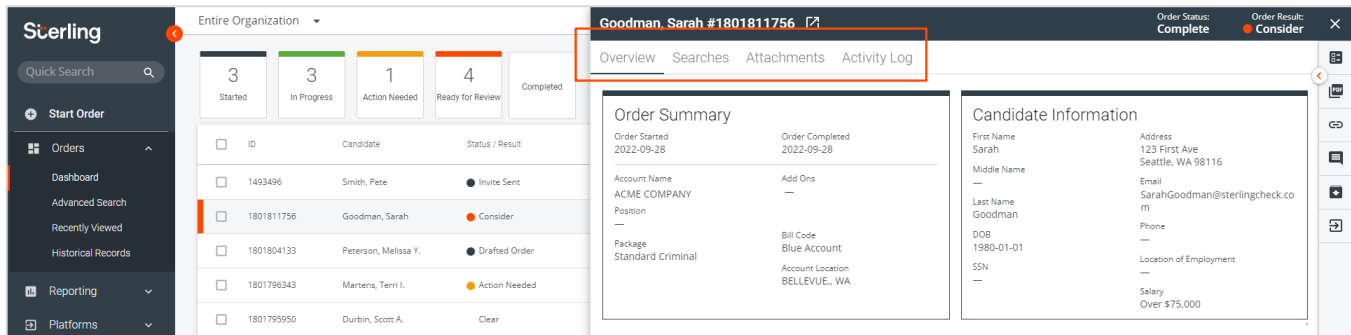
Detail Classic

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

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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

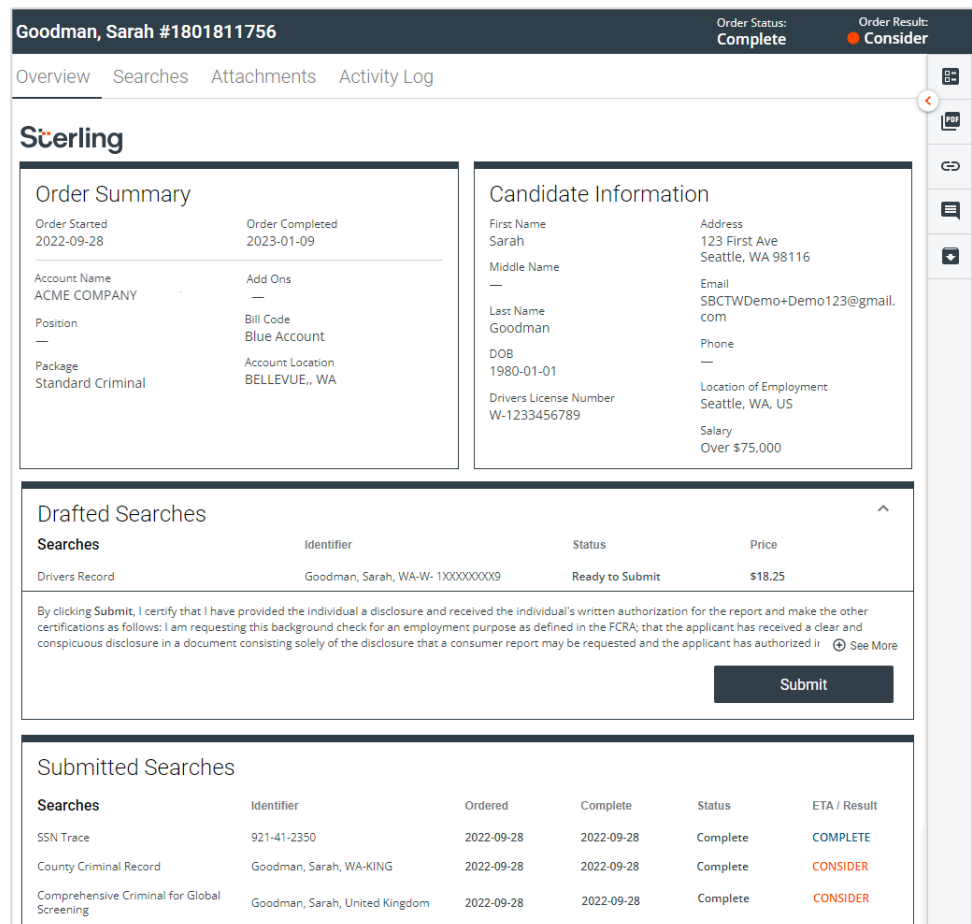
When the Order Manager is opened, you will land on the **Overview** tab by default. This tab will provide you a full summary of everything associated with the selected order.

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.)

The screenshot displays the Sterling Order Manager interface. On the left is a sidebar with navigation options: Start Order, Orders (Dashboard, Advanced Search, Recently Viewed, Historical Records), Reporting, and Platforms. The main area shows a list of candidates under the 'Entire Organization' filter. The candidate list includes columns for ID, Candidate Name, and Status/Result. One candidate, Goodman, Sarah (#1801811756), is highlighted with a 'Consider' status.

The right pane shows the detailed view for Goodman, Sarah (#1801811756). It includes tabs for Overview, Searches, Attachments, and Activity Log. The Overview tab is active, showing a summary of the candidate's search results. A section titled 'County Court Search—Goodman, Sarah, WA-KING' is highlighted with a 'CONSIDER' status. Below this, there are sections for 'Data As Provided' and 'Verified Data'. The 'Data As Provided' section lists personal information like Last Name, First Name, Middle Name, Pin Number, DOB, Race, Gender, and Jurisdiction. The 'Verified Data' section lists report details like Report requested on, Case Number, File Date, Court, Verified By, Last Name, First Name, Pin Number, and DOB. At the bottom, there is a section for 'Fulfillment Notes' with a sample note dated 2023-01-09.

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.

The screenshot displays the Sterling Order Manager interface with the 'Attachments' tab selected for Goodman, Sarah (#1801811756). The interface shows a form to 'Add Attachment' with a dashed box for dragging a file or clicking to browse. Below the form are two dropdown menus: 'Select Attachment Type' and 'Select Associated Search for Attachment'. An 'Attach' button is located to the right of these dropdowns.

Below the form is a table listing existing attachments:

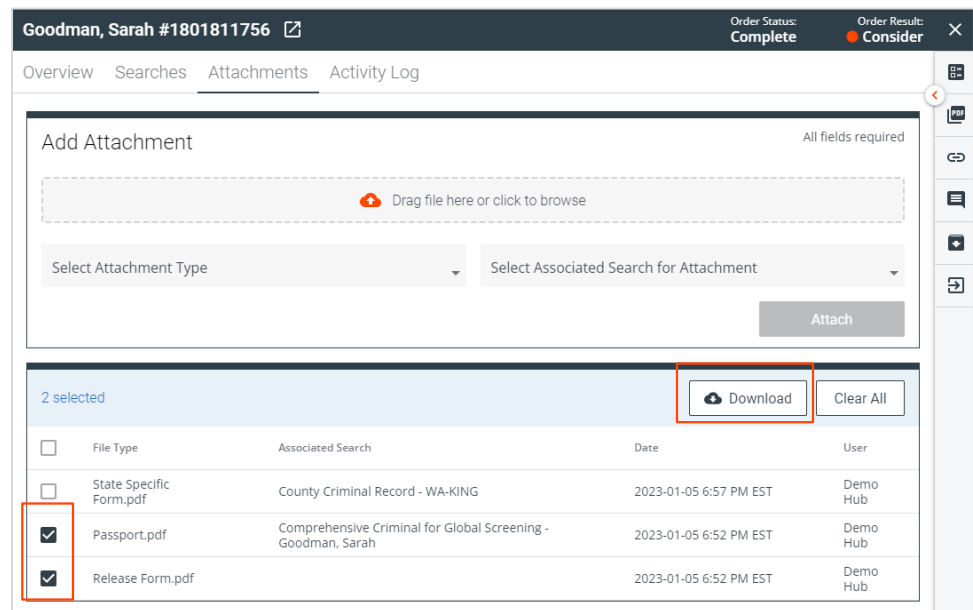
File Type	Associated Search	Date	User
State Specific Form.pdf	County Criminal Record - WA-KING	2023-01-05 6:57 PM EST	Demo Hub
Passport.pdf	Comprehensive Criminal for Global Screening - Goodman, Sarah	2023-01-05 6:52 PM EST	Demo Hub
Release Form.pdf		2023-01-05 6:52 PM EST	Demo Hub

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.

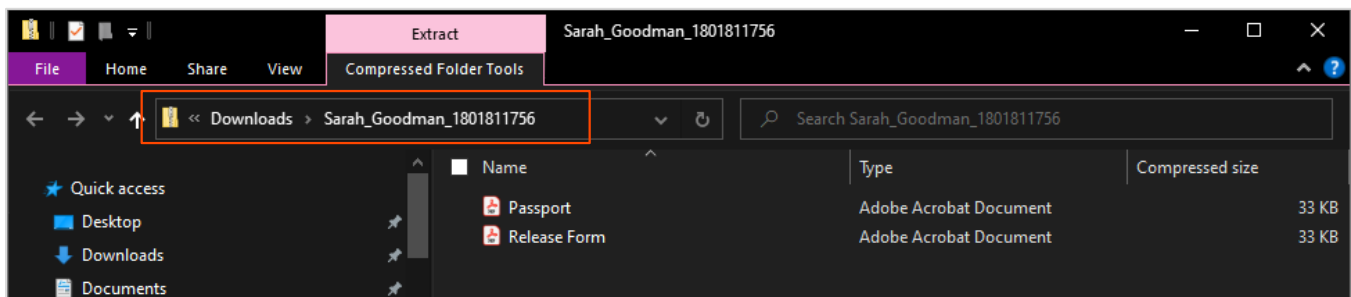
You can also download a single file or multiple files at one time in this section.

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 🔗			Order Status: Complete	Order Result: Consider	✕
Overview Searches Attachments <u>Activity Log</u>					
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 < >		

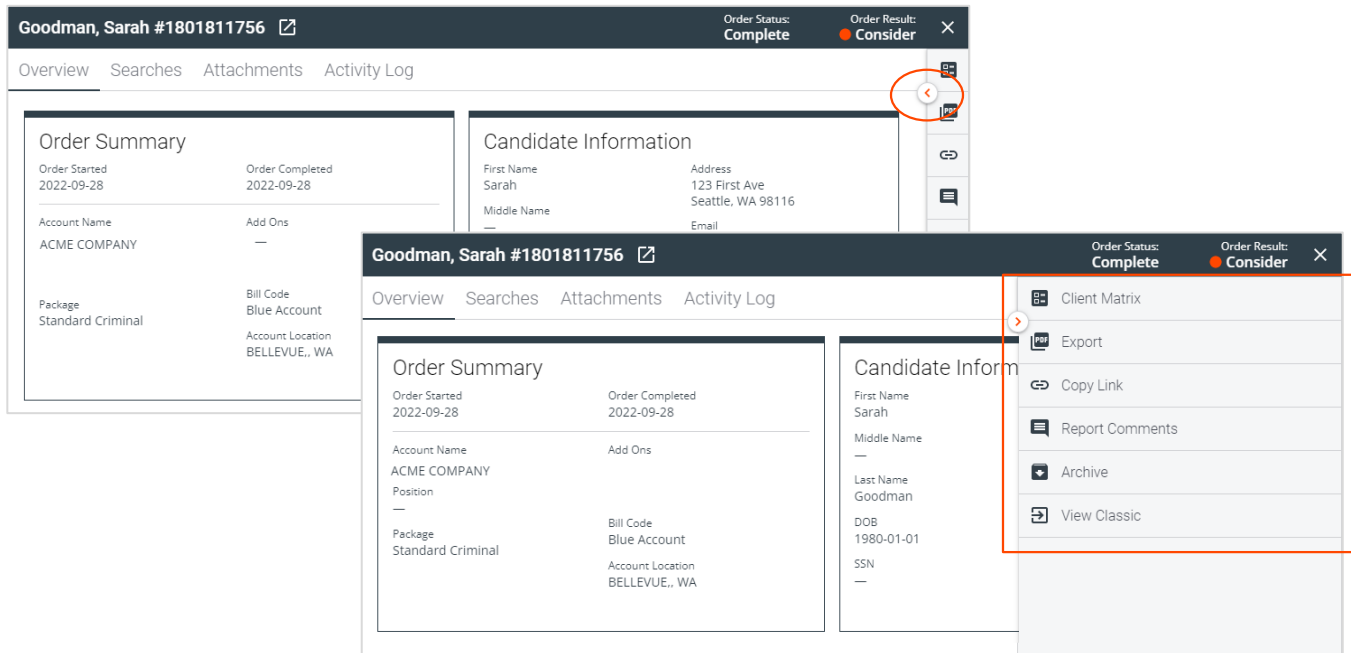
The following events are logged within the Activity Log:

- 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
 - Registration Modifications

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.

ID	Candidate	Status / Result
1499256	Goodman, Sarah	Invite Data Mismatch
1801915386	Goodman, Sarah M.	Pending
1493496	Smith, Pete	Invite Sent
1801811756	Goodman, Sarah	Consider
1801804133	Peterson, Melissa Y.	Drafted Order

	Invite Data	Candidate Data
First Name	Sarah	JACK
Last Name	Goodman	FROST

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.

ID	Candidate	Status / Result
1801915386	Goodman, Sarah M.	Pending
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, Bekcy J.	Clear

	Integration Data	Candidate Data
Personal Info		
First Name	Sara	Sarah
Middle Name	—	Marie
Last Name	Goodman	Goodman
Suffix	—	—
DOB	1969-12-31	1980-02-01
SSN	444234568	444234568
Current Address		
Street	123 First Ave	123 First Ave
City	Seattle	Seattle
State	WA	WA
Zip Code	98116	98116
Country	United States	United States
Start Date	1985-01-01	1980-02-01
End Date	—	—

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

The screenshot shows the Sterling Order Manager interface. On the left is a sidebar with navigation options like 'Start Order', 'Orders', 'Reporting', and 'Platforms'. The main area displays a list of orders with columns for ID, Candidate, and Status/Result. A detailed view for 'Goodman, Sarah Marie #1801915386' is shown on the right. This view includes tabs for Overview, Searches, Data & Identity, Attachments, and Activity Log. The 'Data & Identity' tab is active, showing a 'Data Comparison' section with a toggle for 'Show only discrepancies'. Below this are two tables: 'Personal Info' and 'Current Address', each comparing 'Integration Data' and 'Candidate Data'. Discrepancies are highlighted in yellow.

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.

This screenshot shows the Sterling Order Manager interface with a focus on the 'Client Status' feature. The main area displays a list of orders. A detailed view for 'Goodman, Sarah #1801811756' is shown on the right. This view includes tabs for Overview, Searches, Attachments, and Activity Log. The 'Searches' tab is active, showing a 'Client Status: None' dropdown menu. Below this are sections for 'Important Disclosures', 'SSN Trace', and 'County Court Search'. A 'Data As Provided' table is also visible, comparing candidate data with verified data.

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.

This screenshot shows the Sterling Order Manager interface with a 'Change Client Status' modal dialog open. The dialog has a dropdown menu for 'Client Status' and a text input field for 'Enter comments (optional)'. There are 'Cancel' and 'Change Status' buttons at the bottom. The background shows the same order details as the previous screenshot, but the modal is in the foreground.

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.

The screenshot shows the Sterling Order Manager interface. On the left is a sidebar with navigation options: Start Order, Orders (Dashboard, Advanced Search, Recently Viewed, Historical Records), Reporting, and Platforms. The main area displays a list of candidates with columns for ID, Candidate, and Status / Result. The candidate Goodman, Sarah #1801811756 is highlighted with a 'Consider' status. On the right, the 'Client Matrix' modal is open, showing options to 'Select Result' and 'Select Client Status', along with a field for 'Enter comments (optional)'. The modal also displays the candidate's details: First Name (Sarah), Middle Name, Last Name (Goodman), DOB (1980-01-01), SSN, and Package (Standard Criminal). The Order Summary shows 'Order Started 2022-09-28' and 'Order Completed 2022-09-28'. The Candidate Information section shows 'First Name: Sarah', 'Middle Name: ', 'Last Name: Goodman', 'DOB: 1980-01-01', 'SSN: ', and 'Package: Standard Criminal'. The Order Summary also shows 'Account Name: ACME COMPANY', 'Add Ons: ', 'Bill Code: Blue Account', and 'Account Location: BELLEVUE, WA'. The modal has 'Cancel' and 'Change Result' buttons.

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.

The screenshot shows the Sterling Order Manager interface with the 'Activity Log' tab selected for Goodman, Sarah #1801811756. The Activity Log table displays a list of events with columns for Date, User, and Activity. The first row is highlighted with a red box: '2023-01-09 4:25 PM EST', 'Demo Hub', and 'Client Status changed sample comment'. Other rows include '2023-01-09 4:25 PM EST', 'Demo Hub', 'Client Status changed to Review with Manager'; '2023-01-09 4:24 PM EST', 'Demo Hub', 'Client Status changed to Under Review'; and '2022-09-28 11:43 AM EDT', 'Demo Hub', 'Order status changed to Pending'. The table has a 'Rows per page' dropdown set to 10 and a '1-10 of 10' indicator.

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 sidebar with navigation options: Start Order, Orders (Dashboard, Advanced Search, Recently Viewed, Historical Records), Reporting, and Platforms. The main area is divided into two sections. The top section shows a summary of the organization's status: 3 Started, 4 In Progress, 2 Action Needed, 4 Ready for Review, and 16 Adverse Action Process. Below this is a table of candidates with columns for ID, Candidate, and Status / Result. The candidate Goodman, Sarah (#1801811756) is highlighted in red and has a status of 'Consider'. The bottom section shows the details for Goodman, Sarah #1801811756. It includes tabs for Overview, Searches, Attachments, and Activity Log. The Overview tab is active, showing a summary of the candidate's data and a table of disclosures. A red box highlights the 'Initiate Pre-Adverse Action' button in the top right corner of the Overview tab.

ID	Candidate	Status / Result
1499256	Goodman, Sarah	Invite Data Mismatch
1801915386	Goodman, Sarah M.	Pending
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.	Adverse Action Sent

Data As Provided		Verified Data	
Last Name	Goodman	Report requested on:	2022-09-28
First Name	Sarah	Report completed on:	2022-09-28
Middle Name	Not Provided	Case Number	123456
Pin Number	XXX-XX-2350	File Date	2011-01-01
DOB	XXXX-01-01	Court	King
Race	Unknown	Verified By	Name, DOB, SSN
Gender	Unknown	Last Name	Goodman
Jurisdiction	WA-KING (3058)	First Name	Sarah
		Pin Number	XXX-XX-2350
		DOB	1980-01-01

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

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

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

The screenshot displays the Sterling Order Manager interface, similar to the previous one, but with the 'Pre-Adverse Action Initiated' status. The candidate Goodman, Sarah (#1801811756) is still highlighted in red. The 'Initiate Pre-Adverse Action' button is no longer visible. Instead, two buttons, 'Cancel Adverse Action' and 'Pause Adverse Action', are visible in the top right corner of the Overview tab, highlighted by a red box.

- **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 displays the Sterling Order Manager interface. On the left is a sidebar with navigation options: Start Order, Orders (Dashboard, Advanced Search, Recently Viewed, Historical Records), Reporting, and Platforms. The main area shows a dashboard with five status filters: Started (3), In Progress (4), Action Needed (2), Ready for Review (3), and Adverse Action Process (17). Below these is a table of candidates with columns for ID, Candidate, and Status/Result. The candidate Goodman, Sarah (#1801811756) is highlighted. To the right, a detailed view for this candidate is shown, including tabs for Overview, Searches, Attachments, and Activity Log. The Overview tab displays a client status of 'Review with Manager' and buttons for 'Cancel Adverse Action' and 'Resume Adverse Action'. It also shows important disclosures, including an SSN Trace (COMPLETE) and a County Court Search (CONSIDER). At the bottom, it lists data as provided and verified data, including the last name 'Goodman' and report dates.

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.

The screenshot shows a printed consumer report for 'Employment Verification - DOT—Goodman, Sarah ABC Trucking'. The report is divided into two main sections: 'Provided Data' and 'Verified Data'. The 'Provided Data' section lists fields such as Name (Sarah Goodman), SSN (XXX-XX-XXXX), Start Date (2022-01-01), End Date (Not Provided), Position (Driver), and Type of Employment (Not Provided). The 'Verified Data' section provides a detailed breakdown of the verification process, including the report request and completion dates (2023-05-02), employer information (ABC Trucking), and various employment details. It also includes a 'Comments' section with a result message. At the bottom, there is a 'Fulfillment Notes' section listing several notes with dates and descriptions of actions taken, such as 'Inbound Fax', 'Inbound Call', 'Outbound Fax', and '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.

The image displays two screenshots of the Sterling Order Manager interface for candidate Goodman, Sarah #1801811756. The top screenshot shows the 'Overview' tab with a red box highlighting the 'I-9' icon in the right-hand navigation menu. The bottom screenshot shows the same candidate's profile with a red box highlighting the 'I-9' menu item, which has a sub-menu containing 'Manage I-9' and 'Manage Onboarding'.

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