

Candidate Hub User Guide

Sterling | May 2023

Confidential & Proprietary Statement

This material constitutes confidential and proprietary information of Sterling and its reproduction, publication or disclosure to others without the express authorization of the Chief Legal and Risk Officer of Sterling is strictly prohibited. This presentation and related materials are for informational purposes and represents the expectation of Sterling today only. It is subject to change at any time, for any reason, without notice and Sterling undertakes no duty to provide any update or change at any time. The information presented is not a promise or contract of any kind. Nothing contained herein is legal advice. Sterling recommends working with your legal counsel to ensure overall screening program compliance. Sterling is a service mark of Sterling Infosystems, Inc.

Make the Right First Impression with Your Candidates

Sterling's Candidate Hub is designed to impress and engage, right from the start

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.

Because candidates are at the heart of our business, we're doing our part to simplify and continuously improve the candidate experience during the screening process, from start to finish.

Sterling's highly-rated, award-winning Candidate Hub delivers a seamless, more efficient screening experience for candidates anywhere, anytime – and ensures meaningful and compelling engagement with top talent throughout the hiring process.

HERE'S HOW STERLING DELIVERS A BETTER CANDIDATE EXPERIENCE

- Our intuitive, mobile-responsive design provides candidates the flexibility to enter their information on-the-go, from any device
- Our straightforward document upload and e-signature options help save time
- Candidates can easily opt to login using Google credentials
- The Activity Center allows candidates to easily view their required tasks to be completed, review reports, and access signed documents, all in one place
- Text notifications and reminders provide alerts to help encourage timely task completion
- Once data collection is complete, candidates can conveniently schedule drug tests to close out the screening process

Table of Contents

Initiating a Request for Candidate Information	4
Candidate Hub Account Creation & Initial Login	4
Completing Required Forms	8
Entering Requested Information	10
Submission of Information	14
Activity Center	14
US Specific Features	16

Initiating a Request for Candidate Information

To invite the candidate to complete the data submission workflow in Candidate Hub, you can complete the invite creation process in Client Hub directly or through a Sterling integration.

Once you have entered the candidate's contact information, click Send	Add Candidate Important Disclosures Marcost Bulk Upload Be sure to confirm your candidate's email and phone number before submission.		~
process.	First Name Sarah	Last Name Goodman	
	Email candidatenew@mail.com	Language English (US)	•
	Candidate has consented to receive the invite as email and SMS		
	Mobile Phone Number 212-555-0126		Send Invite

PLEASE NOTE

For an in-depth walkthrough of the invite creation process in Client Hub, you can download the following User Guide: <u>Invite Manager User Guide</u>

Candidate Hub Account Creation & Initial Login

Depending on the settings that are enabled on your account, the candidate will receive either an email or both an email and an SMS text message containing an initial link to access the Candidate Hub. In this sample email, the candidate is prompted to **Click here** to begin the process of submitting their information.

PLEASE NOTE

There are two privacy requirements that you <u>must</u> fulfill before you can begin sending candidate screening invitations via SMS. Please review our <u>Candidate Invite</u> via SMS Instructional Guide to get started.

From: < <u>NoReply@sterling.app</u> >
Date: Thu, Oct 20, 2022 at 9:21 AM
Subject: On behalf of A Customer: Background Screening Instructions
To:
Dear Sarah
A Customer has contracted with Sterling (a leading consumer reporting agency) to perform a background investigation as part of the application process. You will need to complete an electronic consent and disclosure form, as well as provide the relevant details of your employment history. The link below will take you to the data-collection portal in our secure server.
You are encouraged to carefully read the information provided about your rights under the Fair Credit Reporting Act, and the privacy and security of the information you provide.
You may be asked to provide employment history through the data-collection process. The employment history investigation can be significantly shortened if a legitimate e-mail address for your employers is provided along with a supervisor or HR name. Also, if you were working for a temporary agency, please provide that contact information rather than the company you were placed with.
Click on or go to the following url to proceed with your background check.
<u>Click here to begin</u>
If you have any questions or need technical assistance, please contact Sterling toll-free at 1-888-889-5248.
Thank you for your assistance!
Regards,
Sterling

After the candidate selects Click here to begin, they will be re-directed to the Candidate Hub login process.

Sterling's Candidate Hub experience is fully mobile responsive and can be accessed on any device. Over the next few pages, we will show how the candidate login experience appears on a mobile phone.

PLEASE NOTE During the candidate's initial login, a cookie setting notice will be displayed at the bottom of the screen. The candidate will have the option to accept or decline cookies and is able to modify their permissions at any time.

	8:03 🕹 🍸 🕬 🛔
	Scerling
At the top of the login screen, there is a language selection drondown menu	
where the candidate can select a preferred language from among 17 different options.	English (US) 👻 Email Address new.candidate@gmail.com
The candidate's email will pre-populate in the email address /username field. The candidate is required to create and confirm a password for their Candidate Hub account.	Password Must be at least 8 characters in length with 1 uppercase and lowercase letter, 1 number and 1 special character
The candidate will then click Create Account.	Confirm Password
Please note: if the candidate already has an account with Sterling, they can click the "I am a returning user" link at the bottom of the screen.	Create Account Lam a returning user
Once the candidate has selected to create an account with Sterling, US- based candidates will be brought to the Multi-Factor Authentication (MFA) selection screen.	sao sterling
On this screen the candidate can choose one of three options and hit Submit:	Let's verify it is
 Authenticator App (Recommended) 	Help us to prevent
 Text message sent to your device 	unauthorized access to your personal information. How would
 Opt out of Multi-Factor Authentication 	you like for us to send you a verification code?
Please note : You are able to require that a candidate completes MFA set up as part of the Candidate Hub login process. If that setting is enabled on your account, the candidate would not have the option to skip set up and would be required to select one of the first two options noted above.	 Authenticator App (Recommended) Text message sent to your device Opt out of Multi- Factor Authentication
	Submit CS

If the candidate elects to proceed with MFA set-up, the candidate will authenticate their login credentials with a 6-digit code generated either via the Authenticator App and clicking Authenticate or via SMS text message and clicking Submit. Both methods are displayed below, but the candidate will only need to complete one of the two workflows to continue with the login process.



Once the MFA process has been completed, or if the candidate has decided to skip MFA set-up at this time, they will be taken to a Welcome screen which provides additional guidance for completing data collection in Candidate Hub.



Please note: US-based candidates will see mention of their social security number on this screen while candidates based in other locations will not.

After reviewing these Welcome guidelines, the candidate will select Let's Get Started.

The candidate will then be taken to the Quick Setup page and be given the option to set up SMS for follow up notifications and/or link to a Google account for a faster subsequent login experience.

The candidate will make their desired selections and then click Continue.

At this time, Sterling only supports sending SMS messages to US (+1) mobile numbers. Support for additional countries will be made available in the future.

If the candidate has a US mobile number and would like to receive SMS text notifications during their background screening process, they will select that option, enter their information, and click **Continue**.



If the candidate would like to Setup Google one-click login, they can link their Candidate Hub account to their Google account.

If the candidate decides that they want to connect their accounts, when they click the "Sign in with Google" option, a Google Sign In dialog box will pop up and the candidate can either login using their Google existing account or create a new Google account.

When an account is linked successfully, we show a success message, and from that point forward, the candidate will be able to login using Google.

Please note: If the candidate is already signed into Google, the sign in dialog will not pop up, but their Candidate Hub account will still be successfully linked. The link to a Google account can also be managed on the Settings page within Candidate Hub.

Completing Required Forms

Before Sterling gathers any personal information from a candidate during the data collection process in Candidate Hub, we need to get their consent. The forms that the candidate will be prompted to sign depend upon both the location where they live and the location where they will be working.

In this section of our guide, we show a sample experience for a US candidate who is based in New York. We have included mobile and desktop views to show how our experience functions the same way across any device.







sterlingcheck.com | Contact Us

Based on the location selected, Sterling will provide the candidate with the relevant required forms. These documents will vary.

All candidates will be asked to complete the Electronic Signature form.

In this example, a US-based candidate is also prompted to complete a series of consent forms including Disclosure, Summary of Rights FCRA, Authorization, and several state specific documents.

A non-US based candidate would be asked to

sign a Global Consent form versus the forms

displayed in the example above.



PLEASE NOTE

The candidate must view and electronically sign all required forms before they will be able to advance in the background screening process.

Entering Requested Information

In the screenshots that are included in this section of our guide, we show a sample experience for a US candidate who is based in New York. This sample experience also depicts how the Candidate Hub data collection sections will appear for the candidate if you order an employment and/or education verification as part of the background screening process.

After viewing and electronically signing relevant consent forms, the candidate will be directed to a new section within Candidate Hub where they can enter the information required to complete their background screening. On the My Information tab, the candidate will be required to enter personal information including full name, date of birth, and address history.

8:06 🕹 🖀 🕄 🖬 69% 🖷	Scerling			new.candidate@gmail.com ▼
Scerling ≡	My Information	Employment	Education	Documents >
My Information Semployn	Let's get started	* means require	d field	
Let's get started * means required field	Contact Info Enter your First and Last Legal name as show	n on your Government ID		
Contact Info Enter your First and Last Legal name as shown on your Government ID	Title MS •	first Name* Sarah		
Title Ms •	Viiddle Name Jane I do not have a middle name	Last Name* Goodman	Be s	sure to use your legal name
First Name * Sarah	Suffix (I.II.III.IV.Ir.Sr)		you use your leş	zal name. You can find a thorough explanation in our <u>FAQ</u> .
Middle Name Jane	Have you ever used an alternate name?			
Last Name * Goodman	Enter your Date of Birth as shown on your Gove Date of Birth Year * Month * Day *	mment ID		V
Suffix (I,II,III,IV,Jr,Sr)	1976 ¥ 1-jan ¥ 1 ¥		Wh Your information	at happens with my data? on is safe with us. We encrypt and collect your
Have you ever used an alternate name?	I do not have a U.S. Issued Social Security I	Aumber D	Information and share with third	d maintain high security standards. We do not d parties. You can find a thorough explanation in our <u>Privacy Statement</u> .
	Social Security Number * ***,**,***	Confirm Social Security Number*		
	Phone Number* +1 (845) 555-0126	Ext		
	Add phone number			
Once all required fields	Address History Please provide the past 7 years of your addre Do not include any gaps Every date should concide with the previous whereas "Previous Address" is january 1982 Vou can provide your address history after y Please start writing your full address in the a auto-fills	ss history. location end dates E.g.: 2019 January - Curren January 2019 su have provided your current address. ddress bar and select the relevant address as	it this	
have been completed, the	Country* United States		-	
candidate will then click	Address 67 Surrey Street			
screen.	Current			
	Address 2	Zio/Postal Code* 10034		
	Citv/Town* New York	State/Province/Region/County* New York	*	
	Move in Date Year* 2010 • 1-Jan • 1 •			

In this data collection process example, after the candidate supplies their personal information, they are asked to submit information about both their employment and education history.

Scerling			new.candidate@gmail.co	om 🔻	8:07 🛇	\$	^{ic:} .⊪ 68%∎
My Information	Employment	Education	Documents	>	Scerling		=
My Information Great! Now a little about your employment history. Help us retrieve details to save time Please provide the past 7 years of your employm Or, you can provide a combination of up to 3 cur You will be asked to explain any gaps in your em I you will be asked to explain any gaps in your em I you will be asked to explain any gaps in your em Standard Employment Type* Standard Employer Name* Schoen Inc Do not contact this employer Address* G1 Bank Avenue Anartment, suite, unit, floor, etc.	Employment * means a and assure accuracy. ent history. rent and past employers. ployment history. iii complete this step by answering all number of the company or email add e 2015-01-05 – Current Co Country* United States	Education required field for the ress. Do Pleas	you have contractor or temporary experience? experience? exposed this to verify your employment record worked the text street address for the lock worked at	v work we will r franchise ation you	Ay Information Great! Now a l employment h Help us retrieve assure accuracy • Please provide the history. • Or, you can provide current and past empl • You uble basket to employment history. • If you don't meet th compilee this step by, and clicking the Next t • Provide the corpora * means required field Schoen Inc ^ Service 20 Current Employment Type * Standard	Employment ittle about you history. details to save the past 7 years of your em- er a combination of up to overs. o explain any gaps in you hese requirements, you answering all of the que nytor email address.	It ne and ployment
Zip Code 11220	_{City} * Brooklyn				Employer Name*	0 _<	

Once all required fields have been completed on the Employment tab, the candidate will then click Next to advance to the Education tab.

cerling			new.candidate@gmail.com	8:08 👁	🛪 👓 🗐 68% 🛢
My Information	Employment	Education	Documents	Scerling	=
Education	× means	required field	_	Employment	Education
Please provide a record of your educat highest level of education.	ion history. It is recommended that you prov	ide your			
				Education	
Institution Country* United States	v State* State* New York	Ŧ		Please provide a record of y is recommended that you p of education.	our education history rovide your highest le
Institution Type* College/University	← City/Town* NEW YORK	*		* means required field	
Institution Name*		Please prov	vide vour full name at attendan	Ce and Institution Country*	
NEW YORK UNIVERSITY		*	graduation year	United States	
uddress		Plea	se specify which campus you attended.	State *	
State Street				New York	
ip Code	Course Format			Institution Turo t	
10004	On-Campus	•		College/University	
egree Type *	Major/Field of Study *				
Bachelor's	 Business Administration 			City/Town*	
id you graduate?*				NEW YORK	
Yes	Ŧ			Institution Name *	
art Date	End Date			NEW YORK UNIVERSITY	
Year* Month* Day* 2006 - 9-Sep - 4 -	Year* Month* Day 2010 6-Jun 4	*		Address	
Fraductice Date				1 State Street	
staduation bate				Ш О	<
Year 🚽 Month 🚽					
If Different					



Once all required fields have been completed on the Education tab, the candidate will then click Next to advance in the process.

After the candidate has submitted the information that is needed to complete the types of screenings that you have requested, they will be taken to the Documents tab. On this tab the candidate is able to upload a document(s) by either dragging or browsing for a file. In this example, the candidate is required to upload the completed version a specific state consent form.

Scerling			new.candidate@gmail.com 🔻	8:10 🛇 🕱 🔤 al 68% 🖬
✓My Information	Employment	Education	Documents >	Scerling ≡
				Education Documents
Please upload the following d The information you previously provided requi BMP or PDF format) Required Forms Georgia Statewide Consent Form O Download Orginal Form	OCUMENTS TO COMPLETE	YOUR background check (Kindiy upload the documents in JPEG, Drag here or <u>o</u> Must be 5MB (pe	JPG, PNG, DOC, DOCX, TXT, GIF, TIF, TIFF,	Please upload the following documents to complete your background check The information you previously provided requires us to ask for the following form(s). (Kindly upload the documents in JPEG, JPG, PNG, DOC, DOCX, TXT, GIF, TIF, TIFF, BMP or PDF format) Required Forms Georgia Statewide Consent Form @
Additional documents Document Type Applicant Obtained Results	v	Drag here or c Must be 5MB (pe	slick to browse for a file er document) or less.	Download Original Form Upload a file Must be 5MB (per document) or less.
Back			Next	
Scerling			new.candidate@gmail.com ▼	8:11 o * • • • • • • • • • • • • • • • • • • •
✓My Information	Employment	SEducation	Documents >	Seducation Documents
Please upload the following d The information you previously provided requir BMP or PDF format) Required Forms Georgia Statewide Consent Form ①	ocuments to complete set us to ask for the following form(s).	(Kindly upload the documents in JPEG, Ji Georgia Consent-SGoodman.pdf Must be 5MB (per	PG, PNG, DOC, DOCX, TXT, GIF, TIF, TIFF,	Please upload the following documents to complete your background check The information you previously provided requires us to ask for the following form(s). (Kindly upload the documents in JPEG, JPG, PNG, DOC, DOCK, TXT, GIF, TIF, TIFF, BMP or PDF format)
Download Original Form				Required Forms Georgia Statewide Consent Form
Additional documents Document Type Applicant Obtained Results	•	① Drag here or cl Must be 5MB (pe	ick to browse for a file r document) or less.	Download Original Form Georgia Consent-S Complete × Must be 5MB (per document) or less.
Back			Next	



PLEASE NOTE

On a mobile device, the candidate can take a photo of a document and upload it for attachment in this tab.

Once the candidate has uploaded the required attachment, the candidate will click **Next**. The candidate will then be taken to a Review tab. If the candidate missed something while completing the previous section(s), a red alert icon will appear.



Once all alerts have been resolved, the candidate can continue in the process.

While in the Review tab, the information that candidate has entered throughout the previous tabs will be displayed with an option to edit, if needed.

If no edits are needed, the candidate can select Confirm.



public record information. If you have questions regarding this notice, please cont Sterling at +1 888.889.5248 (U.S Toll-Free) or

Ο

<

Submission of Information

The final section in the data collection workflow is the Complete tab. This section lets the candidate know that their information has been submitted to Sterling and provides details on how to contact Sterling if necessary.

cerling	6		new.candidate@mail.com 🔻	8:18 o	🅱 56 al 67% i
< Seducation	Documents	Review	Complete	Scerling	-
				Review	Complete
i Don't miss updates. Sign	up for text message notifications!		Click Here		
Your information has I	been submitted.			Don't miss update text message noti	s. Sign up for fications!
Thank you!					Click Here
Submitted On November 11, 2022					
You may be contacted by a represe	ntative from Sterling to verify your information.			Your information	has heen
If you have any questions regarding	g your order, please <u>Contact Us</u> or <u>Visit Our FAQ</u>	<u>s</u> .		submitted.	nuo been
613 Notice: This notice is to inform background check includes public r) you that the background check you authorized A Cu record information. If you have questions regarding t	ustomer at 9457 S. UNIVERSITY, #337 his notice, please contact Sterling at -	to obtain is being prepared. The +1 888.889.5248 (U.S Toll-Free) or	Thank you!	
+1 646.829.3382.]			Submitted On November 11	, 2022
Download PDF Go to Ac	tivity Center			You may be contacted by a Sterling to verify your inform	representative from nation.
				If you have any questions re	garding your order,
				please Contact Us or Vis	it Our FAQs
this tab, the car ormation that th	ndidate has the option ey entered throughout	to <mark>Download PD</mark> the prior tabs. Th	F version of the ne candidate may	613 Notice: This notice is to background check you auth at 9457 S. UNIVERSITY, #33 prepared. The background of	inform you that the orized A Customer 7 to obtain is being check includes

information that they entered throughout the prior tabs. The candidate may also select Go to Activity Center.

Activity Center

The Activity Center is a central location within Candidate Hub for all of the candidate's content related to screening services performed by Sterling, including both current and past data collection workflows that a candidate has completed for any Sterling clients.

Within Activity Center, under Tasks the candidate can easily view and take action on outstanding required tasks and confirm when previous required tasks were completed.

Once Sterling has processed the candidate's background screening, the results will be posted under Reports. Until results are available, the report will be in a Pending status.

Under Documents, the candidate is able to view any attached documents that were submitted or collected in Candidate Hub.

If the candidate is required to submit a document, review an Adverse Action notification (US candidates only), or complete an additional process needed to complete their screening, they will be able to complete these actions under Tasks. In this example, the candidate must complete the attached form and then click **Done** in Activity Center in order for their background screening to be completed.

5:33 🕹 💈 💈 56 🔊 82% 🕯	Scerling new.candidate@mail.com -
û ● jdirect.com + ④ :	Please upload the following documents to complete your screening. Based on the information you provided, the following form(s) are required in order to complete your screening or have been requested by your potential employer. (Kindly upload the documents in before the other screening or have been requested by your potential employer.
Scerling ≡	Required Forms
Tasks 🗸	
Additional Documents Needed	Data collection and ID Verification instructions Download Original Form Download Original Form Drag here or click to browse for a file
In Progress Created 11/11/2022 A Customer Screening	
$\begin{bmatrix} \nabla C \\ T \\$	
Eorm Completed 11/14/2022 A Customer Screening	
III O <	Done



US Specific Features

If you hire within the US, some additional services may be available within the Candidate Hub and be relevant to your screening program, including:

PII Data Match

If you currently have this setting enabled on your Sterling account, the candidate enters their Name, Social Security Number, and Date of Birth in the My Information tab per what has been outlined on Page 11 in this guide.

If a mismatch is discovered, a message will appear asking the candidate to double check their information.

The candidate will then see additional instructions on the page reminding them to check their personal information. The candidate can choose to make an adjustment to their data before they click **Next** again to proceed in the process.



Let's get started	* means required field
Contact Info	
 Enter your First and Last Legal name as shown Please recheck your information and make any 	on your Government ID y corrections and click Next button
Title MS	First Name* Sarah
Middle Name Jane	Last Name * Goodman
I do not have a middle name	

Drug & Health Screening

If you currently leverage Sterling's Drug & Health services and you request that the candidate or employee complete a drug or clinical service, the candidate is able to search for and select a clinic site in Candidate Hub that is most convenient for them.

On the Scheduler page, the candidate's zip code will be automatically used for the initial search to find possible clinic locations where the service(s) can be performed. The candidate can then select a convenient clinic location from the list of options. When the invite is confirmed, they will receive their electronic registration by email.

Please note: the candidate will be presented with electronically enabled clinics by default. If none are found nearby, the system will present nonelectronic locations instead.

	candidate@email.com	*
Scheduler	Review	>
Map Satelli The Im USA INFO STREATONN TO STREATONN The Im The Im	te et tr tr tr tr tr tr tr tr tr t	um C [] Los An Sta Histori CHINATOWN
0 mL Ornic UNI	PERSITY JOIVERSITY JOINE JOIN	Ch ARTS DIS
0 ml.		
0 mi.		
	Ormi.	0 ml. 0 ml.

If multiple services are required, the Scheduler presents clinic locations that can perform all required services. In the rare event that a single site isn't available that can perform all of the services, the candidate can schedule the services at different locations by choosing the **Select Separate Test Sites** button at the bottom of the page. The candidate is then prompted to select a convenient clinic for each individual service and they will receive a separate electronic registration for each distinct clinic location that is chosen.

Once the clinic(s) is selected, clicking the **Next** button will advance the candidate to the Review tab.

Identity Verification powered by ID.me

If you currently leverage Sterling's Identity Verification service prior to the background screening process and the candidate has previously completed the Identity Verification process, the candidate will see an additional option to log into Candidate Hub using their previously established ID.me credentials.

If the candidate chooses to access Candidate Hub in this way, information that they previously had verified through ID.me will pre-populate within the My Information section.

