

Candidate Hub User Guide

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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

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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 Invite** to initiate the process.

PLEASE NOTE

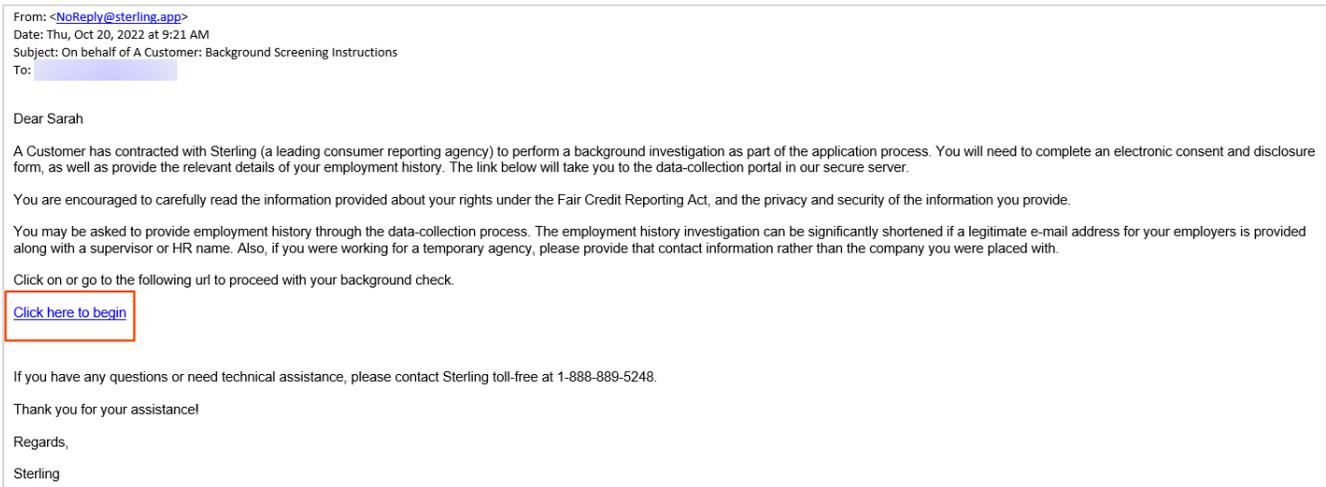
For an in-depth walkthrough of the invite creation process in Client Hub, you can download the following User Guide: [Invite Manager User Guide](#)

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 must fulfill before you can begin sending candidate screening invitations via SMS. Please review our [Candidate Invite via SMS Instructional Guide](#) to get started.



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.

At the top of the login screen, there is a language selection dropdown menu where the candidate can select a preferred language from among 17 different options.

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.

The candidate will then click **Create Account**.

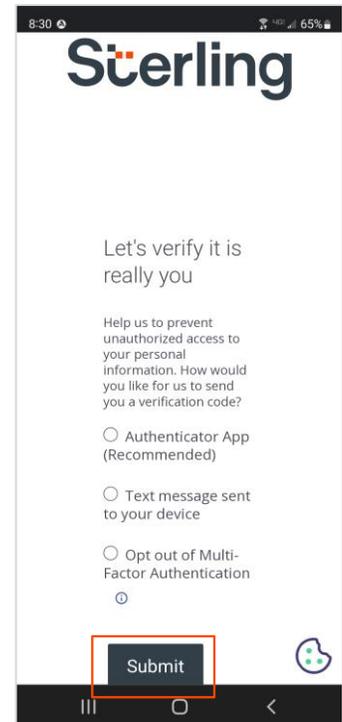
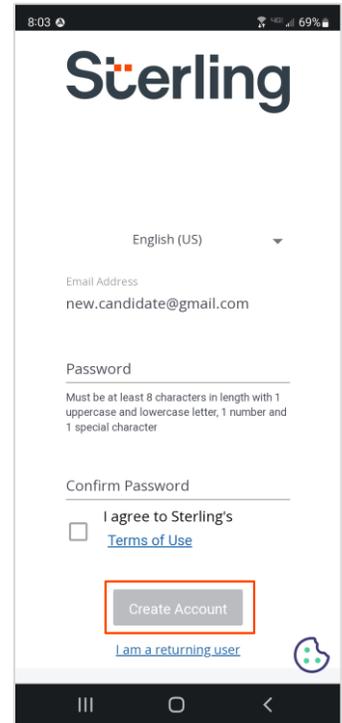
Please note: if the candidate already has an account with Sterling, they can click the “I am a returning user” link at the bottom of the screen.

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.

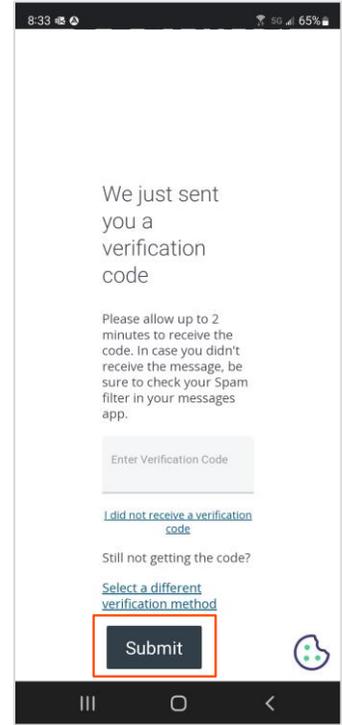
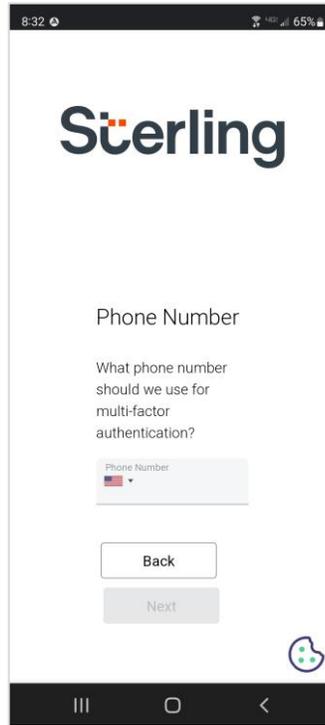
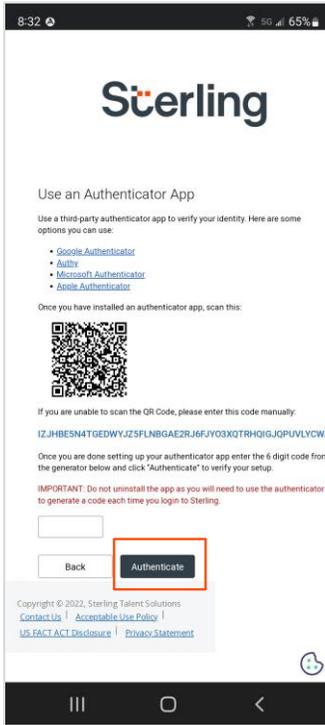
On this screen the candidate can choose one of three options and hit **Submit**:

- Authenticator App (Recommended)
- Text message sent to your device
- Opt out of Multi-Factor Authentication

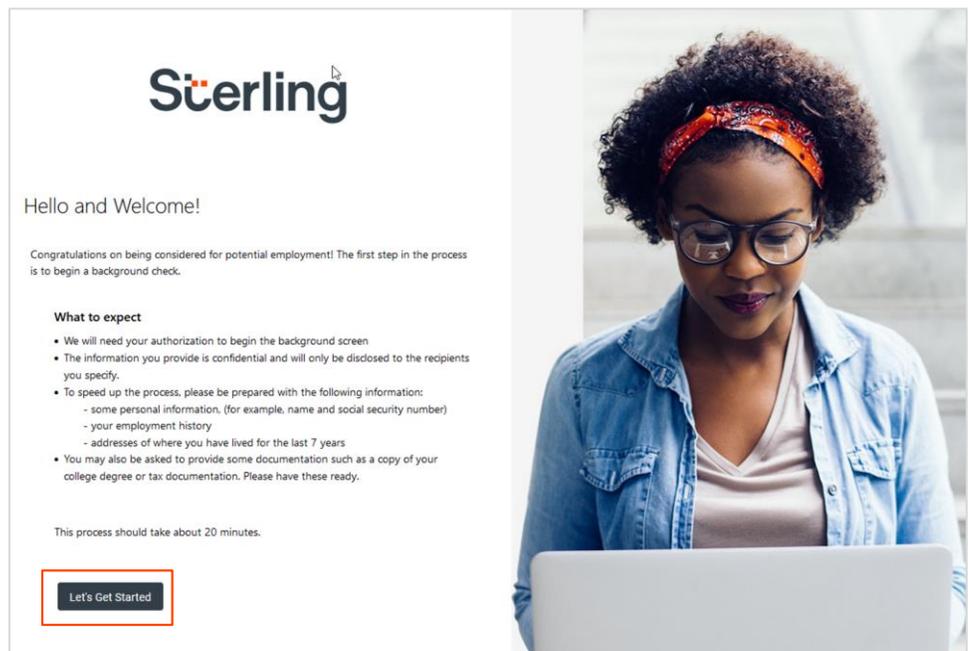
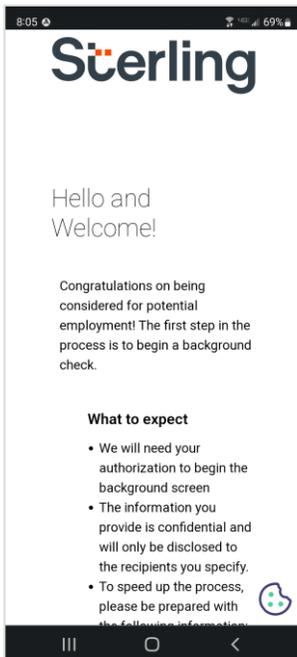
Please note: You are able to require that a candidate completes MFA set up as part of the Candidate Hub login process. If that setting is enabled on your account, the candidate would not have the option to skip set up and would be required to select one of the first two options noted above.



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.



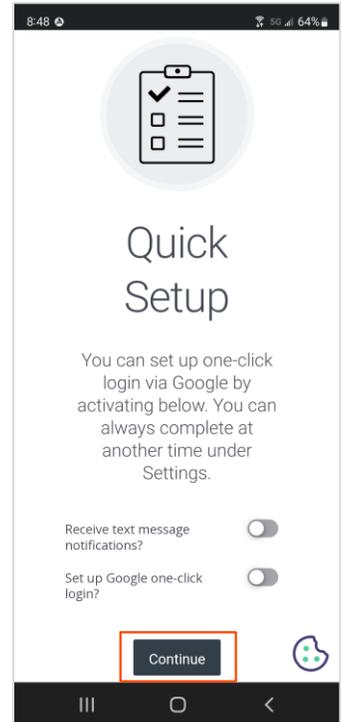
Once the MFA process has been completed, or if the candidate has decided to skip MFA set-up at this time, they will be taken to a Welcome screen which provides additional guidance for completing data collection in Candidate Hub.



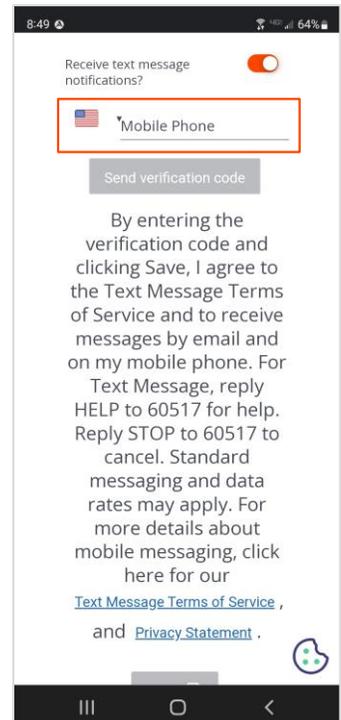
Please note: US-based candidates will see mention of their social security number on this screen while candidates based in other locations will not.

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.

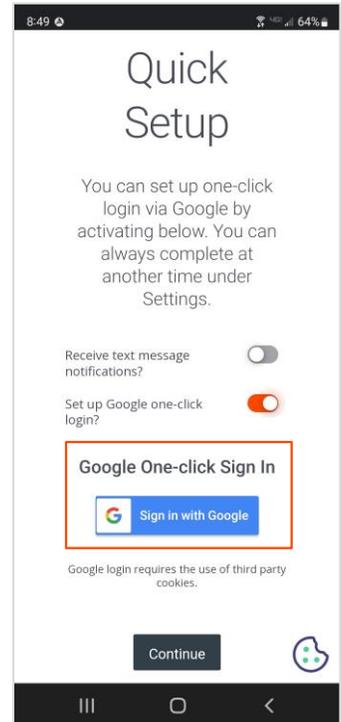
If the candidate has a US mobile number and would like to receive SMS text notifications during their background screening process, they will select that option, enter their information, and click **Continue**.

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.

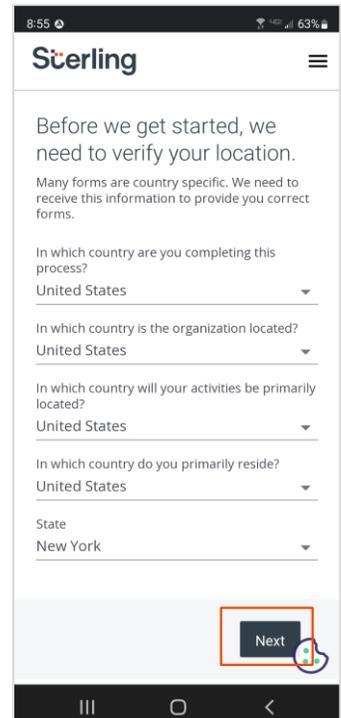


Completing Required Forms

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.

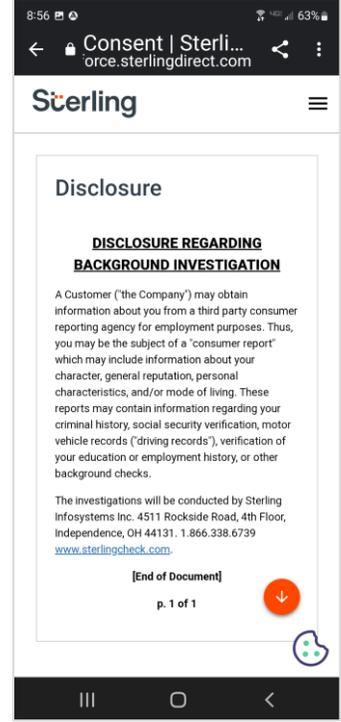
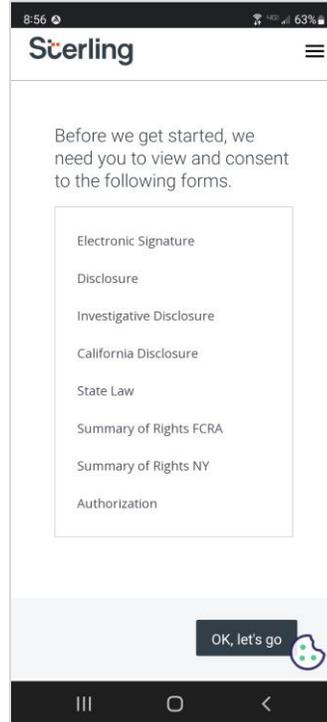
Upon starting the data collection workflow for the first time, the candidate will be required to verify their location and click **Next**.



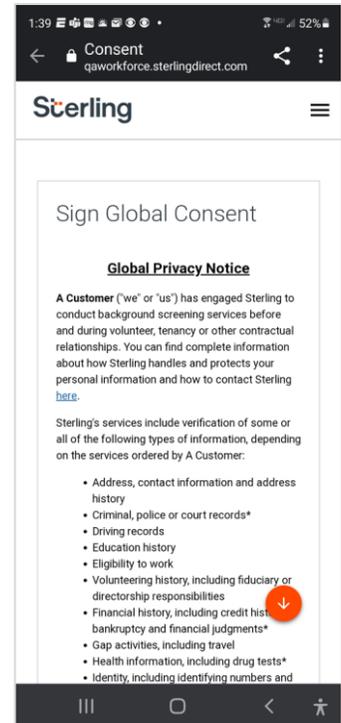
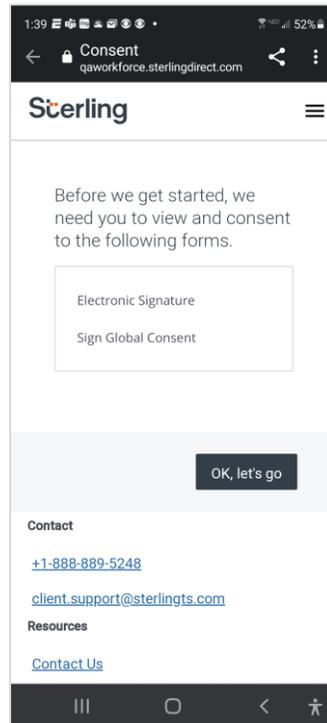
Based on the location selected, Sterling will provide the candidate with the relevant required forms. These documents will vary.

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.

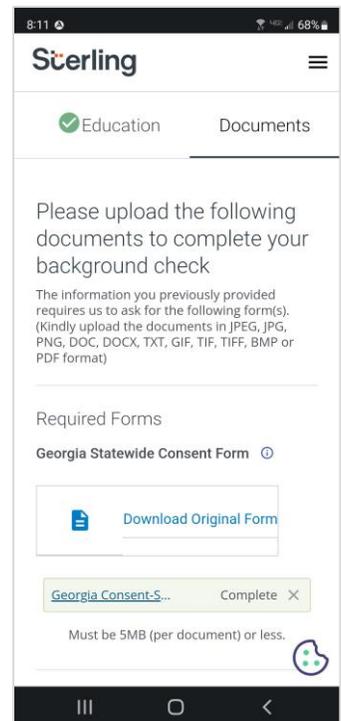
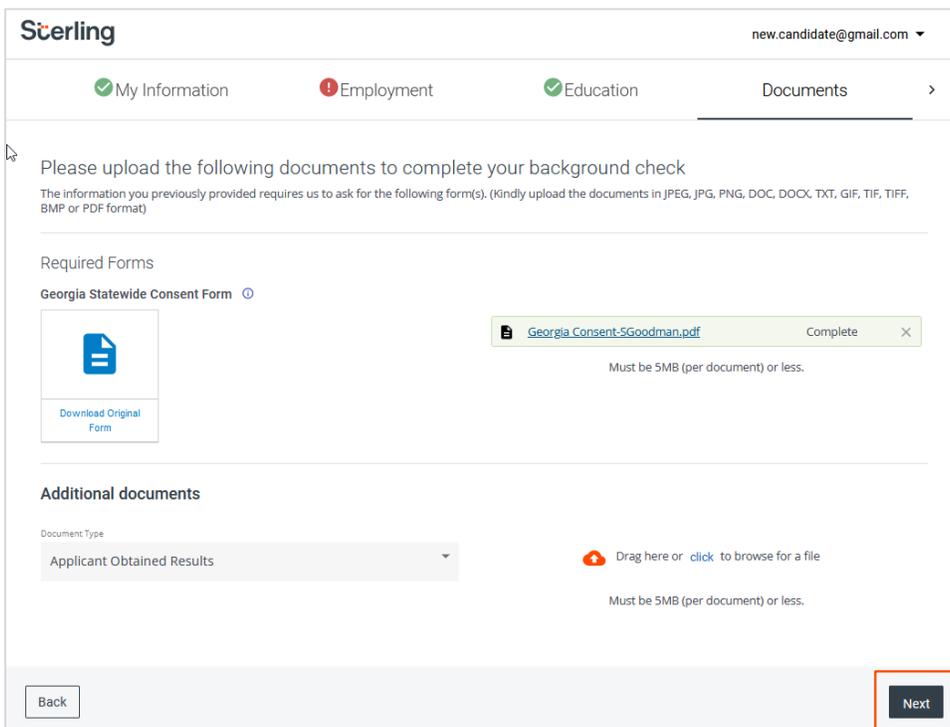
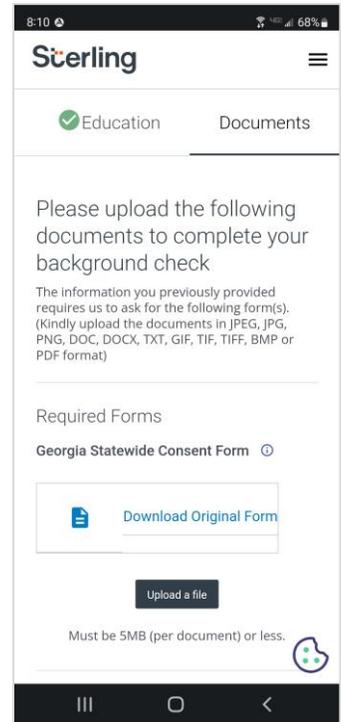
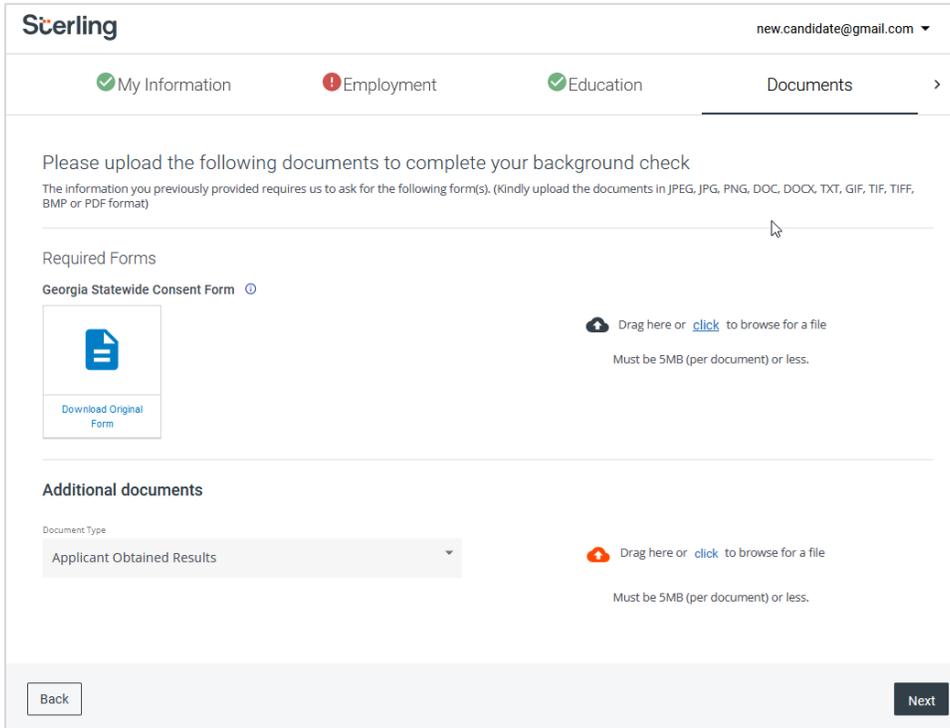
Once all required fields have been completed, the candidate will then click **Next** to advance to the next screen.

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.

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

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.



PLEASE NOTE

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

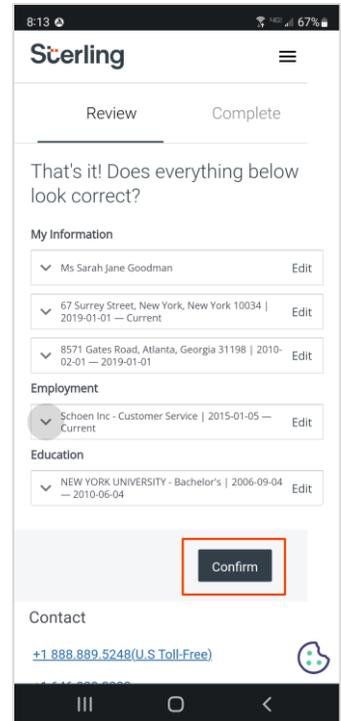
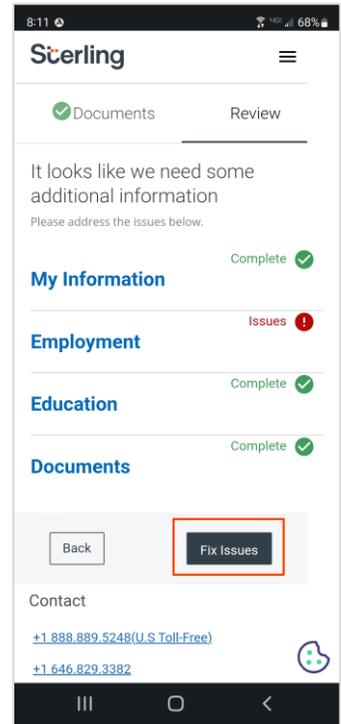
Once the candidate has uploaded the required attachment, the candidate will click **Next**. The candidate will then be taken to a Review tab. If the candidate missed something while completing the previous section(s), a red alert icon will appear.

The candidate will be required to click **Fix Issues** and then be taken directly to the section where information is missing.

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

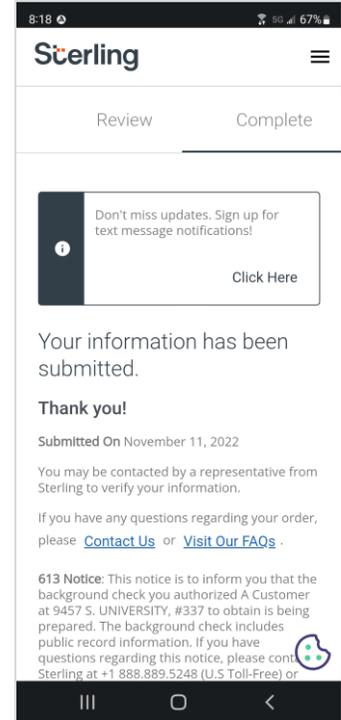
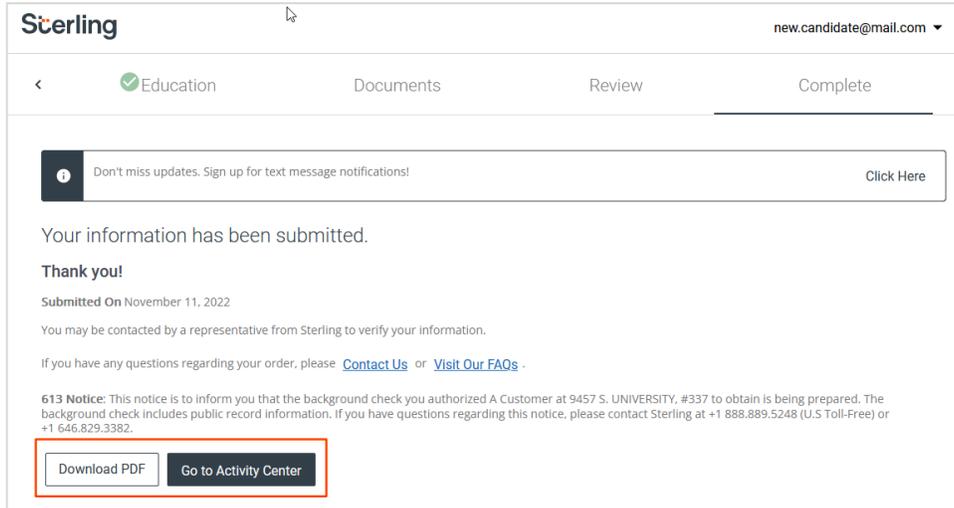
While in the Review tab, the information that candidate has entered throughout the previous tabs will be displayed with an option to edit, if needed.

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



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.



On this tab, the candidate has the option to **Download PDF** version of the information that they entered throughout the prior tabs. The candidate may also select **Go to Activity Center**.

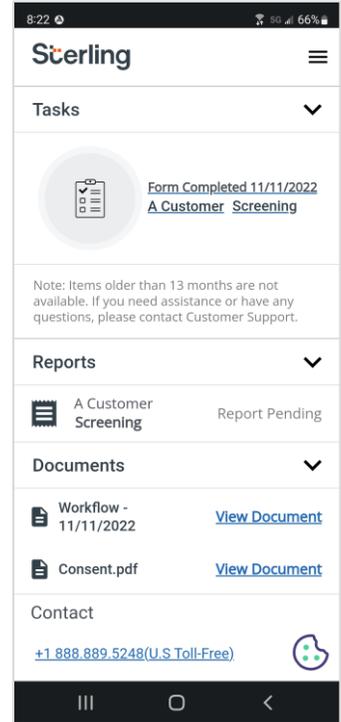
Activity Center

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.

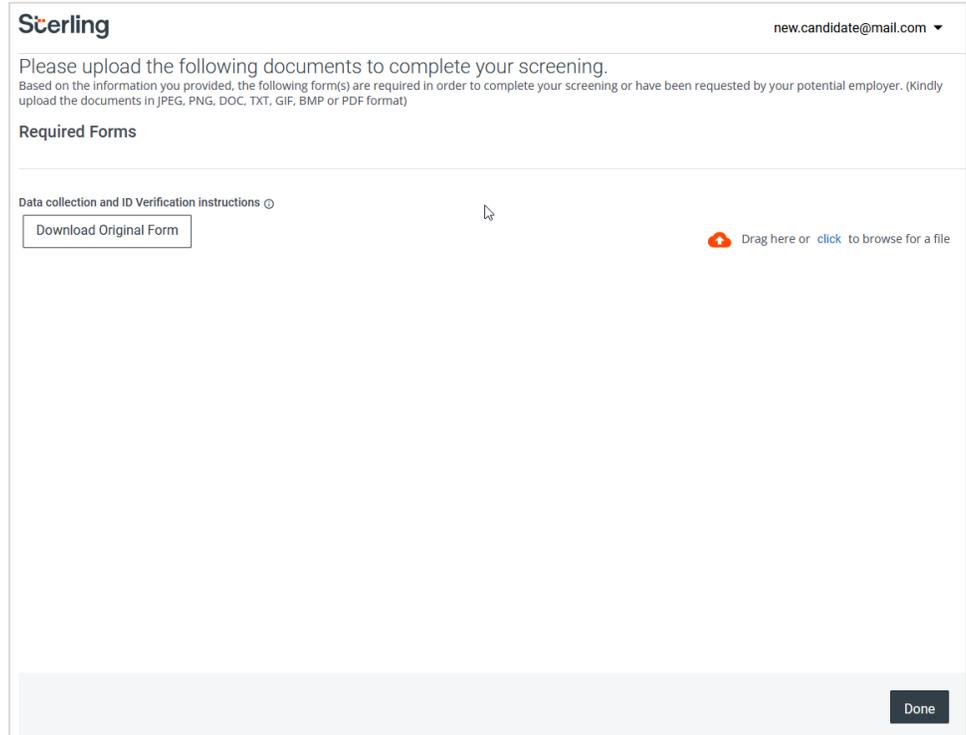
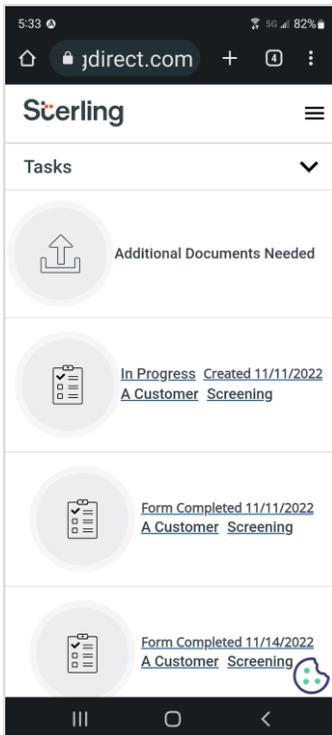
Within Activity Center, under Tasks the candidate can easily view and take action on outstanding required tasks and confirm when previous required tasks were completed.

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.



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 screenshot shows a form for entering personal information. The 'Date of Birth' section has dropdowns for Year (1976), Month (1-Jan), and Day (1). Below it is a checkbox for 'I do not have a U.S. issued Social Security Number'. A text input field for 'Social Security Number' is present with a validation error message: 'Please recheck your information and make any corrections and then click Next button.' Below the SSN field is a 'Phone Number' field with a dropdown for country (+1) and a text input containing '(845) 555-0126'. There is also an 'Add phone number' button. To the right, a partial view of another section titled 'What happens...' is visible.

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.

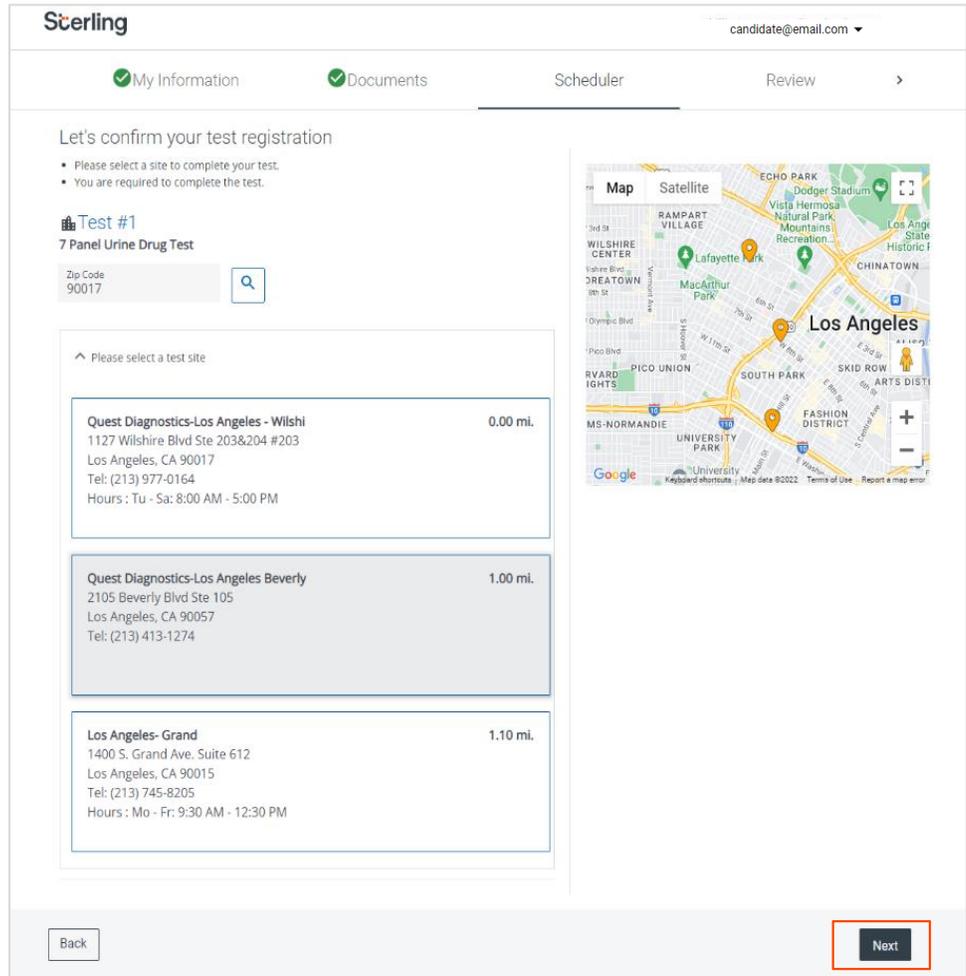
The screenshot shows the 'Contact Info' section of a form. It includes instructions: 'Enter your First and Last Legal name as shown on your Government ID' and 'Please recheck your information and make any corrections and click Next button'. The form fields are: 'Title' (Ms), 'First Name' (Sarah), 'Middle Name' (Jane), and 'Last Name' (Goodman). There is a checkbox for 'I do not have a middle name'. A legend indicates '* means required field'.

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 non-electronic locations instead.



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.

