# Invite Manager User Guide

Sterling | July 2023

# Reduce time-to-hire by managing daily screening tasks with ease

## Our modern, intuitive client experience is designed 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, we've created a modern, intuitive, interactive Client Hub that helps you manage your daily workload with ease and accelerate time-to-hire.

## HOW STERLING DELIVERS AN ELEVATED CLIENT EXPERIENCE:

- A modern, mobile-responsive design that's accessible anytime, anywhere
- A permission-based hub allows users to see which orders are relevant to you
- 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 Invite Manager gives you the ability to view candidate information and attachments in a central place prior to submitting an order to Sterling for fulfillment.

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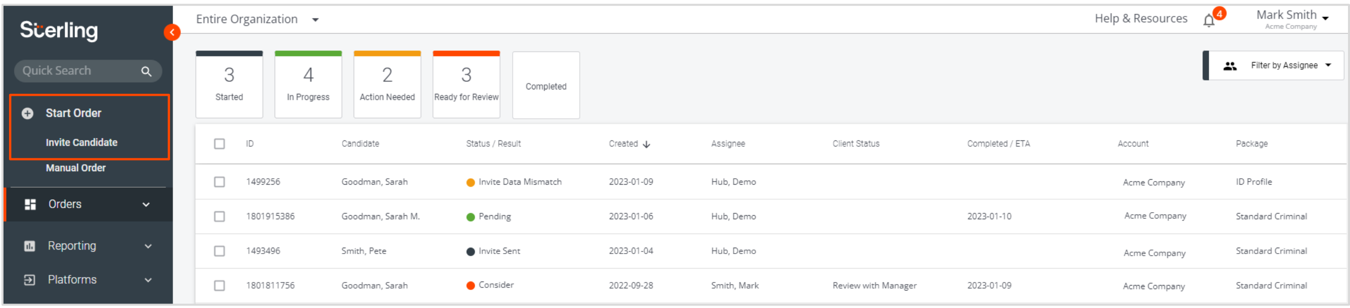
# Creating an Invite in Client Hub

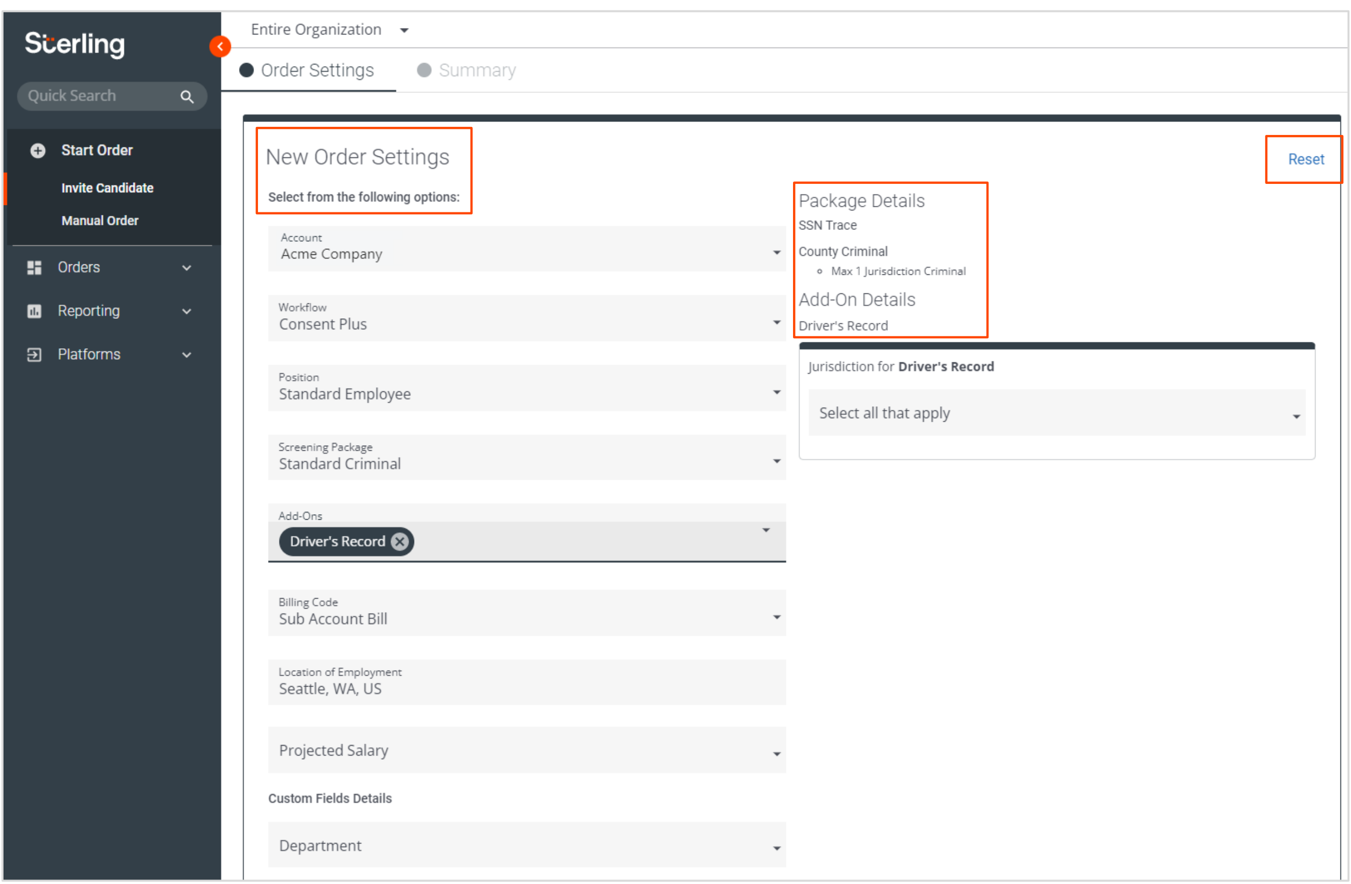
You can create a screening invite for a candidate via the Start Order menu located in the left navigation bar. Clicking Invite Candidate will take you to the Order Setting tab where you can start the invite creation process.




Once you are on the Order Settings tab, you will see a list of required option fields on the New Order Settings card. The option fields that are required as part of the invite creation process will vary depending on your Sterling account settings and location.

As you complete the required fields, a list of Package Details and Add-On Details will appear on the right side of the New Order Settings card. This list will outline all services that will be included as part of your candidate's invite. If you have selected any Add-On services, you may be required to complete additional details. Those data collection requirements will also be presented on the right side of the card.

If needed, selecting **Reset** in the top right corner will clear all selections from the New Order Settings card.



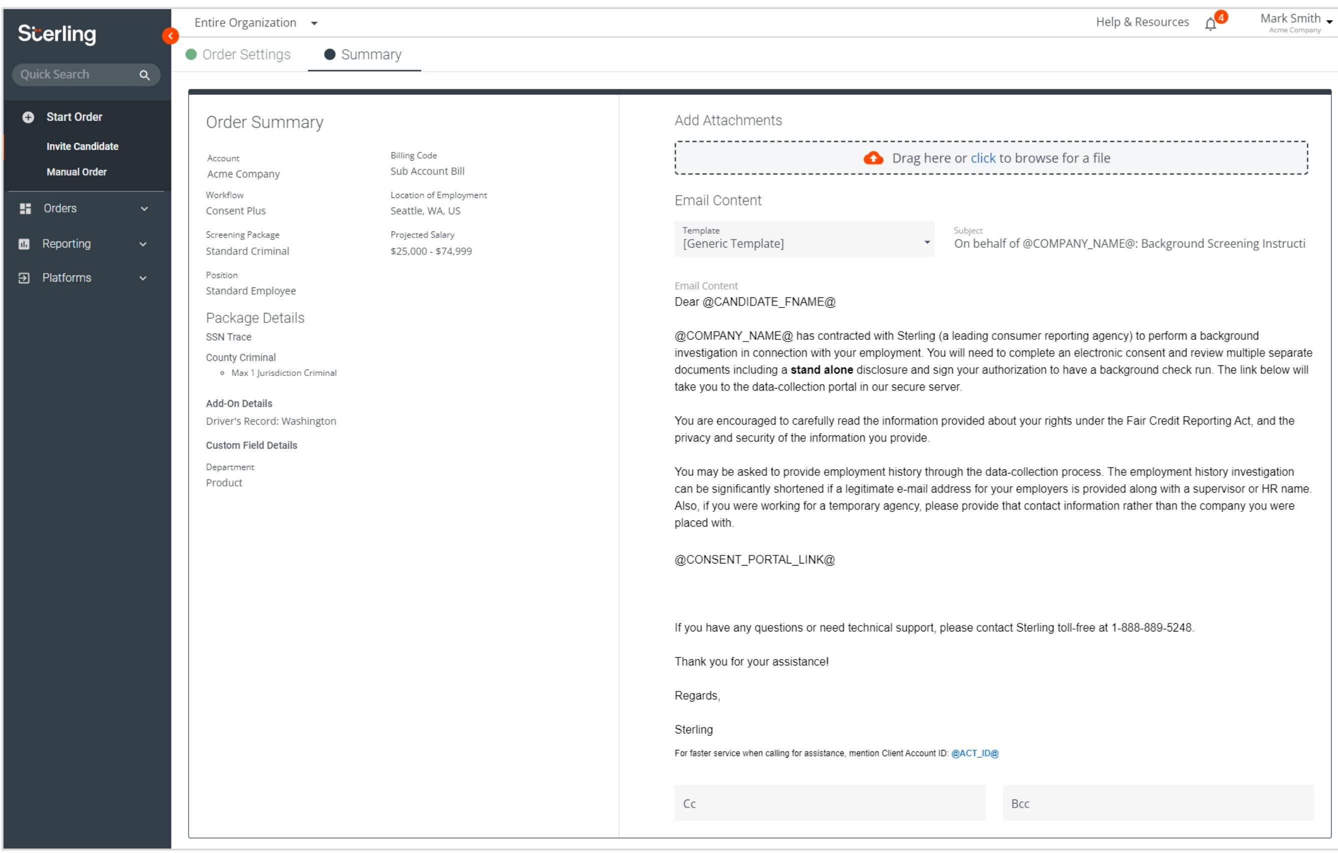
A comprehensive list of the potential New Order Setting option fields that you may see is included below:

- **Account**: Select the Account you would like to associate with the new invite.
- **Workflow**: Select the Workflow you would like to use for the new invite.
    - **Consent:** This workflow will collect consent only. No personal information will be collected from the candidate. This workflow option will only appear if your Sterling account has a setting enabled that allows you to create orders without a Social Security Number.
    - **Consent Basic:** This workflow will collect consent as well as basic information from the candidate, including Name, Date of Birth, Social Security Number, and Address History.
    - **Consent Plus:** This workflow will collect consent, basic information (listed above) and any additional candidate information which may be needed to fulfill other services in the package, such as Employment, Education, Reference, and Credential information, etc.
    - **Data Collection Only:** This workflow is used to collect all personal data from the candidate without collecting a background check consent form. Consent should be collected by you before selecting this workflow.
    - **Custom Workflows:** These are custom workflows defined by your organization.
- **Position**: Select the Position you would like to use for the new invite.
    - You can configure your Sterling account so that when a specific Position is selected, the Screening Package, Projected Salary (US Only), and Billing Code fields are pre-populated.
- **Screening Package**: Select the Screening Package you wish to initiate for the candidate. The details of what is included in the selected package will be presented on the righthand side of the New Order Settings page.
    - If you wish to create an invite via A La Carte ordering, please select the A La Carte screening package at the top of the list.
- **Add-Ons**: This field allows you to add on any available Sterling services to the invite via the A La Carte process. The screening services you select will be presented on the righthand side of the New Order Settings page.
    - If additional data is needed for the service that you selected, this data will be collected via additional required fields that will populate before moving to the next step.
- **Billing Code**: If you are utilizing Billing Codes on your Sterling account this field allows you to enter or select the Billing Code you would like to associate with the new invite.
- **Location of Employment**: Enter the candidate's Location of Employment. This information will determine which documents are sent to the candidate as part of the screening process, including required notices, consent forms, and important disclosures.
- **Projected Salary**: Select your candidate's Projected Salary. This information is used as part of FCRA and state consumer reporting restrictions in the United States. If your candidate's Location of Employment is outside of the United States, Projected Salary will not be required.

- **Custom Fields**: If your account has Custom Fields defined, those fields will be presented here with their associated selection options.

Once you have completed all the required fields, select the **Next** button at the bottom of the New Order Settings card to move forward with the invite creation process.

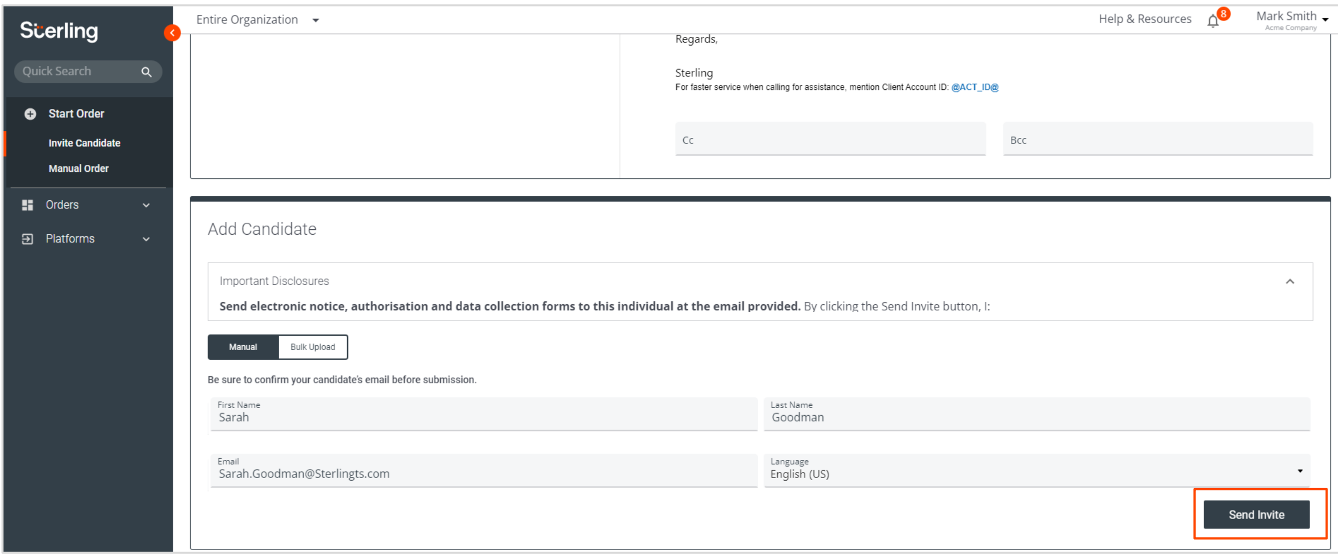

After clicking **Next**, you will be able to review all the associated details for your invite on the Summary tab. You will also be able to add attachments, select/review email template, and add a CC and/or BCC email to the invite.




- **Order Summary**: This section provides an overview of all the data points that were selected as part of the invite on the Order Settings tab. These can be edited before the invite is sent by tapping on the Order Settings tab.
- **Add Attachments**: You can Add Attachments that you would like to associate with the invite. The files attached will be sent to the candidate along with the invite email. If you are creating a bulk invite, any attached files will be sent to all candidates.

- **Email Content:** Review the email template that is being sent to the candidate.
  - **Template:** From the drop down, you will be able to select from the customized templates that are available on your account.
- **CC/BCC:** You have the option to add email addresses to CC or BCC on the invite email that is sent to the candidate.

Once you have finalized your invite selections, you will need to enter additional information about the candidate in the Add Candidate card before your invite can be sent.




- **Important Disclosures:** Expand this field to review the Client Certification prior to submission of the invite. The disclosure language shown will depend on your company location.
- **Manual/Bulk Upload:** Allows you to select if the invite should be sent to a single candidate or multiple candidates. In this example, the Manual option has been selected.
- **First Name:** Enter the candidate's First Name.
- **Last Name:** Enter the candidate's Last Name.
- **Email:** Enter the candidate's Email Address.
- **Language:** Enter the Language that you would like the invite to be generated in. Both the email sent to your candidate as well as their Candidate Hub experience will be delivered in the language you select. The candidate will have the opportunity to change the language while on the Candidate Hub login page.

Once you have reviewed and completed all invite details, selecting **Send Invite** will generate the email invitation to the candidate.

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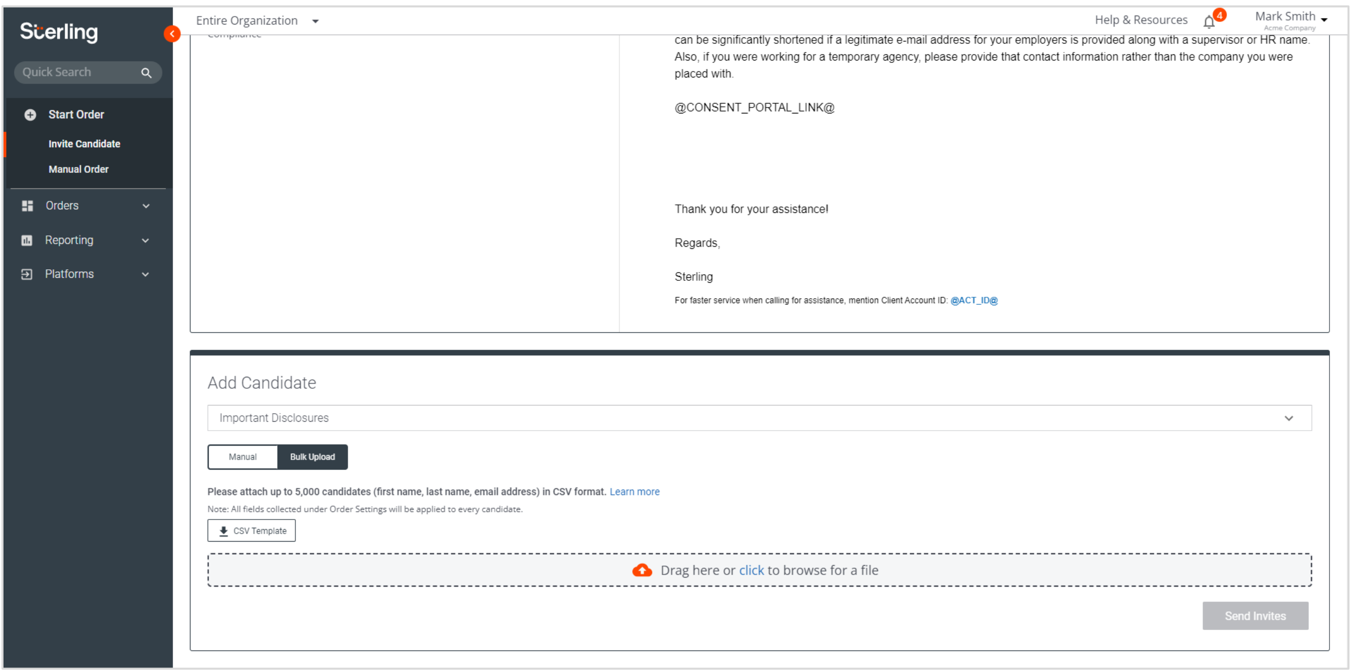
| PLEASE NOTE | **For more details on the experience once the candidate receives their screening invite, please refer to our [Candidate Hub User Guide](#).** |

# Bulk Invite

Bulk Invite allows you to send the same invite to up to 5000 candidates at once, instead of recreating the same details for each candidate separately.

To create a bulk invite, you will need to complete the New Order Setting fields to define the account, workflow, position, screening package, bill code, location of employment, projected salary, and custom fields as described in the previous section. Custom Fields can be modified per invite within the bulk file itself, but all other fields defined on the New Order Settings tab will be applied to all invites created via the Bulk Invite process.

Under the Add Candidate section, select **Bulk Upload.**




Once **Bulk Upload** has been selected, Sterling will present a CSV Template that can be downloaded. The template's columns are based on the selections made in the New Order Settings.

Within the bulk upload file template, you will need to complete the required fields. First [Name], Last [Name], and Email are always required.

| | A | B | C | D |
|---|---|---|---|---|
| 1 | **First** | **Last** | **Email** | **Department** |
| 2 | John | Smith | John.smith@sample.com | |
| 3 | Sarah | Goodman | Sarah.Goodman@sample.com | Product |
| 4 | Blake | Johnson | Blake.Johnson@sample.com | |

If you utilize custom fields, you can enter the value per row for each invite. Any custom fields without a specific value will have the value defined on the Order Setting page applied. Please note that there is a limit of 5,000 candidates per file uploaded.

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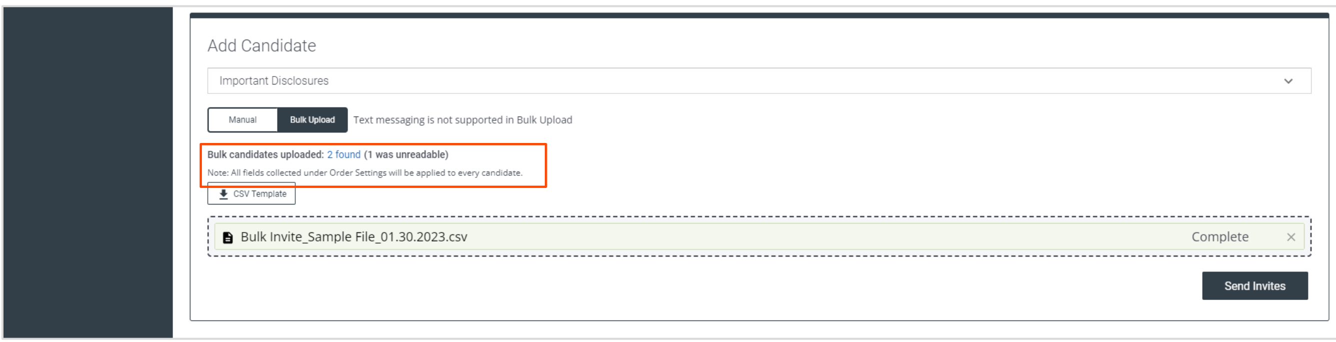
| **PLEASE NOTE** | **The values for any custom fields included in the bulk upload file are defined on the New Order Settings page. You only need to complete these columns if you wish to change the value for a given candidate. Any custom fields that are optional in the New Order Settings page are also optional for the file upload.** |

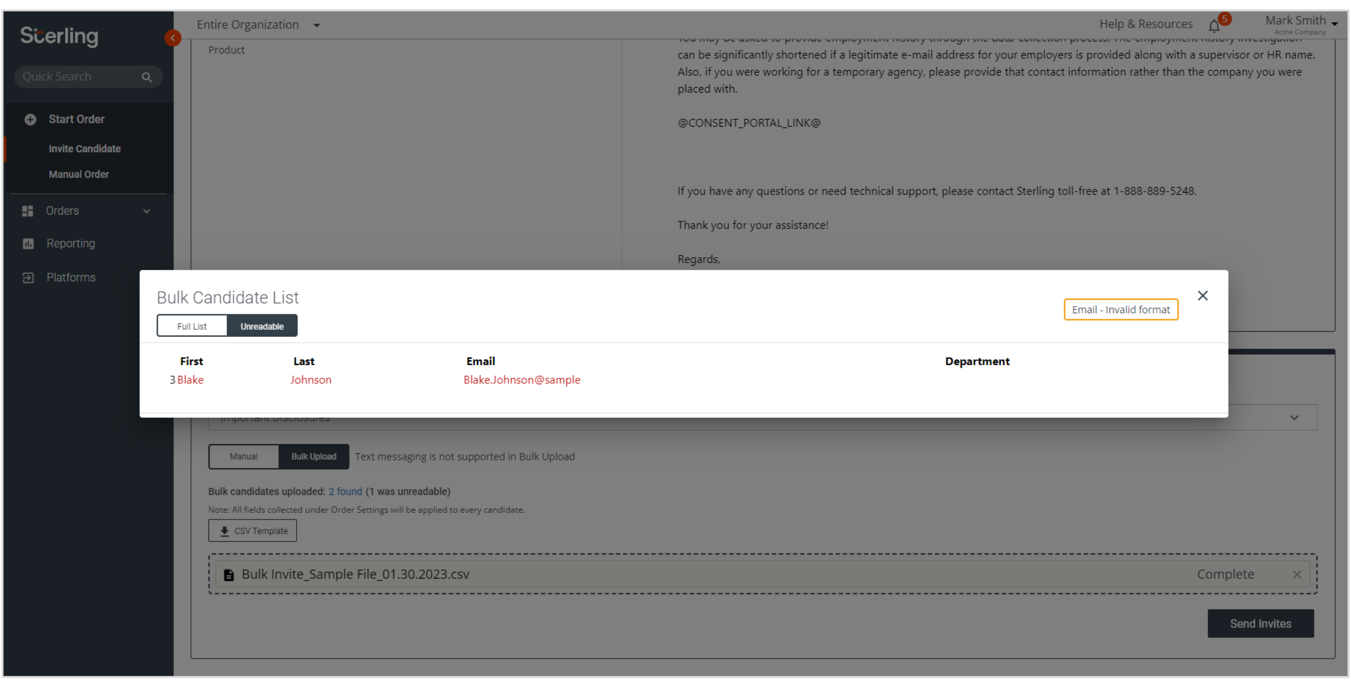
Once you have included the required data in your templated file, it can be added in the Bulk Upload section.

Upon a successful upload and prior to clicking **Send Invite**, Client Hub will indicate the status of candidate data that was included in the uploaded file. You can view these results next to the Bulk Candidate Upload line item:

- **Found:** Rows that can successfully generate an invite to a candidate.
- **Unreadable:** Rows that have one or more errors that need to be corrected before an invite can be generated.




To view more details, tap the hyperlink. After tapping the hyperlink, a box will appear that allows you to review any Unreadable rows. If you hover over an individual row, an error message will appear in the top right corner to inform you of what needs to be corrected in that row.




Once any errors are corrected, you will need to reupload your bulk upload file to confirm all candidates invites can be successfully generated.

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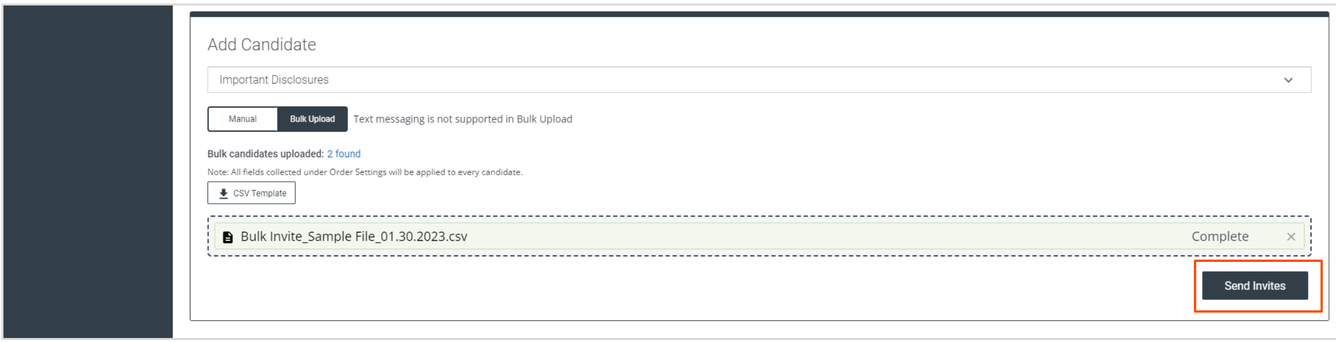
| **PLEASE NOTE** | **If you choose to select Send Invites without correcting the candidate information in any Unreadable rows, invites will not be generated for those candidates.** |

Selecting **Send Invites** will generate the bulk invitations to your candidates.




Once you have opted to send your invites, you will receive two emails to inform you of the status of your bulk upload. These emails will include confirmation that the bulk upload file was received and that the bulk upload was completed.

**From:** noreply@sterlingcheck.app
**Sent:** Thursday, February 2, 2023 5:48:43 PM (UTC-05:00) Eastern Time (US & Canada)
**To:** Mark.Smith@sample.com
**Subject:** Your bulk invites have been received

Sterling

Dear Mark,

Thank you for using our bulk invite feature. Your file has been received and will soon begin processing.

There is nothing further for you to do at this time. We will contact you again when your orders have finished processing.

If you have questions, please contact Sterling Customer Service at *[Contact Number]*. Representatives are available to assist you Monday through Friday from 8 am to 8 pm Eastern time. You may also contact us by emailing client.support@sterlingcheck.com.

This email has been automatically generated.Please do NOT reply to this email.

If an Unreadable row(s) were found in your file, the completion email will also contain that information and include a file that explains the errors in more detail.

**From:** noreply@sterlingcheck.app
**Sent:** Thursday, February 2, 2023 5:48:47 PM (UTC-05:00) Eastern Time (US & Canada)
**To:** Mark.Smith@Sample.com
**Subject:** Your bulk invites are complete!

Sterling

Dear Mark,

Thank you for using our bulk invite feature. Successful candidate invites are now visible on your dashboard.

- **3** invites sent
- **2** invites failed

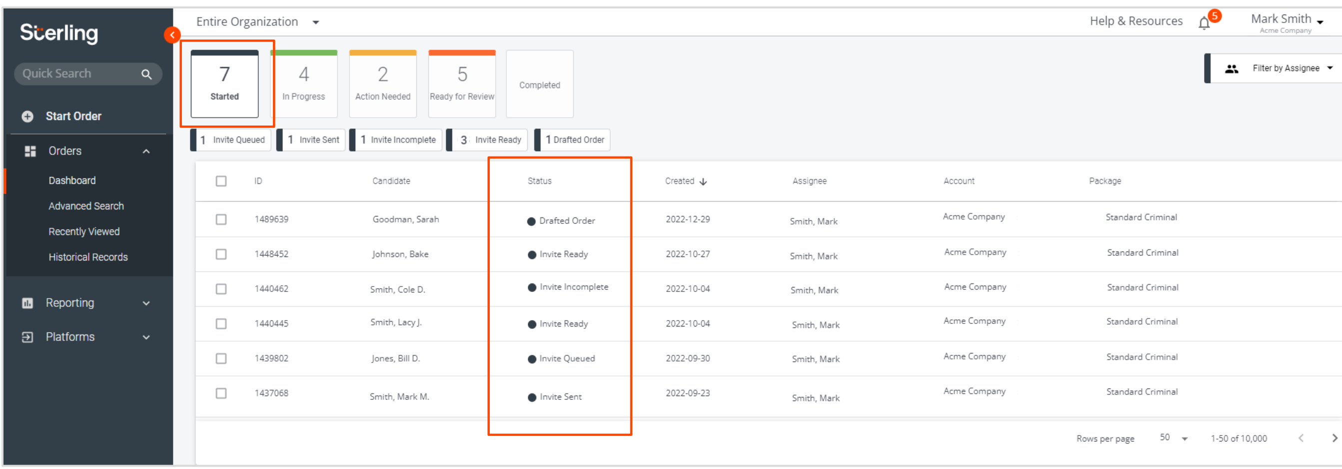
If you have questions, please contact Sterling Customer Service at *[Contact Number]*. Representatives are available to assist you Monday through Friday from 8 am to 8 pm Eastern time. You may also contact us by emailing client.support@sterlingcheck.com.

This email has been automatically generated.Please do NOT reply to this email.

## Reviewing Invite Status in Client Hub

Within Client Hub, you can review all invites from the Started tile in the Order Pipeline. By clicking the Started tile, the main orders grid will display all active invites and their respective statuses. Selecting any of the status types will filter what results are returned.

- **Invite Queued**: Invite has been created via an integration link, a Portal Code, or that has not generated an email to the candidate.
- **Invite Sent**: Invite has been created but the candidate has not yet opened the invite.
- **Invite Incomplete**: The candidate accepted the invite but has not finished submitting their information and sent it back to Sterling.
- **Invite Ready**: The candidate has submitted their information and it is ready for your review, but you have not yet submitted the order for fulfillment.
- **Drafted Order**: Order has been started but you have not yet submitted to Sterling for processing.



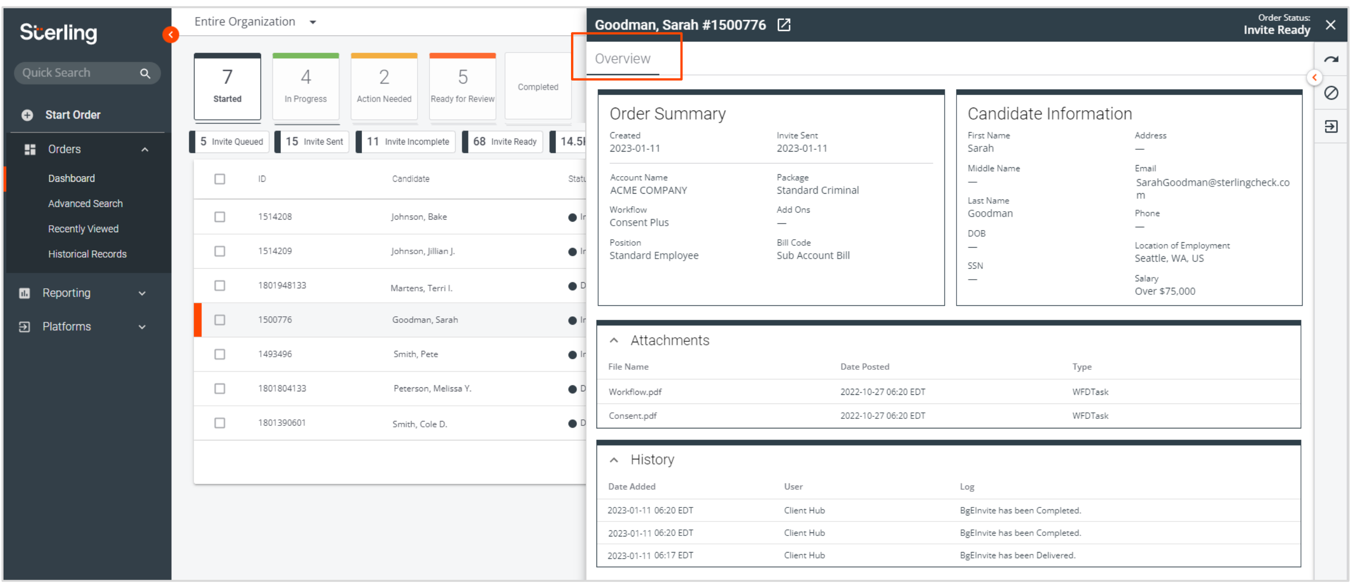
# Invite Manager

Sterling's Invite Manager is a tool that allows you to intuitively interact with your background screening invites before they are submitted for fulfillment by Sterling. Invite Manager includes an easy-to-read format and gives you the ability to review candidate information and attachments in one central place prior to submitting an order.

# Accessing Invite Manager in Client Hub

You can access the Invite Manager within Client Hub by clicking on a candidate name from the Order Grid. Once a candidate is selected, an Invite Manager will slide out on the righthand side of the screen.

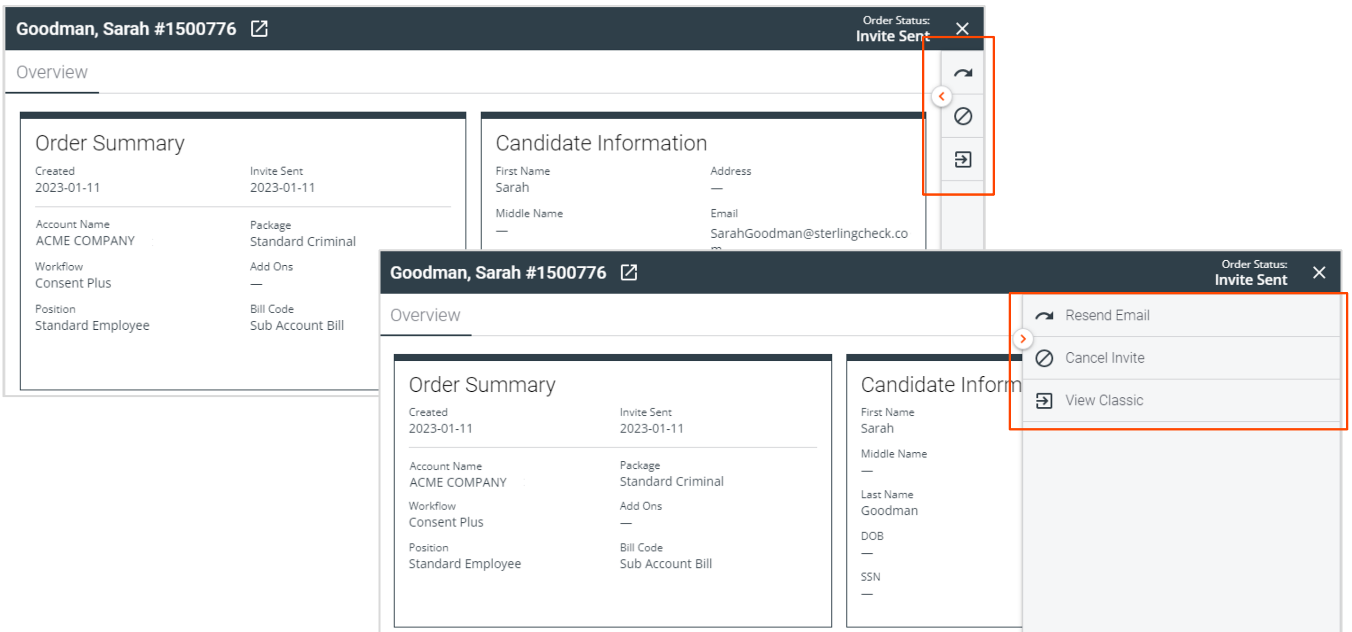
All invite data for the selected candidate is organized into different sections within the Overview Tab.




- **Order Summary**: The Order Summary section will display the various details associated with the invite for the candidate.
- **Candidate Information**: The Candidate Information section will display the candidate information that was input by you and/or collected from the candidate.
- **Attachments**: The Attachments section will display any documents that the candidate has uploaded during the invite process. It will also include any signed consent authorizations, as well as the workflow document.
- **History**: The History section includes an audit log of all events associated with the invite.

## Right Navigation Options

Along the righthand side of the Invite 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.

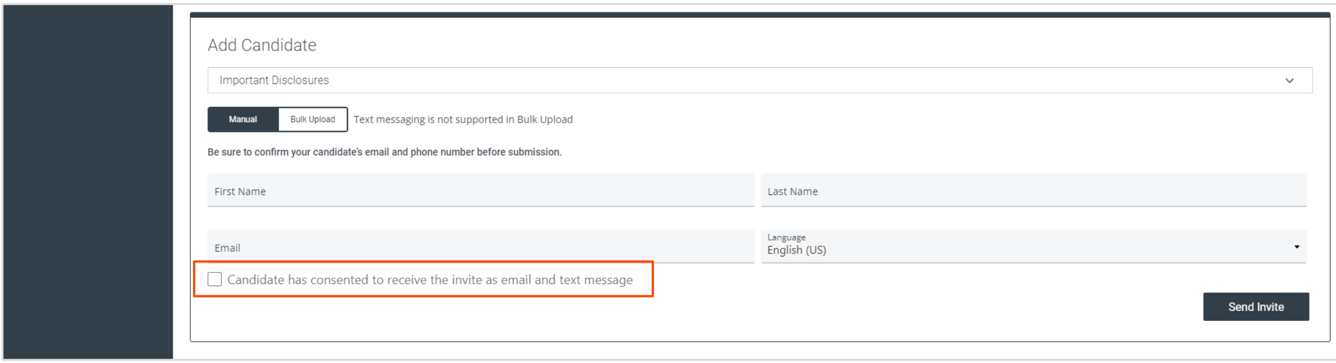



As you scroll through the Invite Manager for a candidate, the navigation bar will remain at the top of the right-hand side, allowing you to take the following actions anywhere within the Invite Manager.

- **Archive Invite**: Selecting Archive Invite will move the invite into an Archive state.
- **Cancel Invite**: Selecting Cancel Invite will cancel the entire invite workflow and the task to complete the invite will no longer be available to your candidate within Candidate Hub.
- **View Classic**: Selecting View Classic will redirect your current browser tab to the classic ScreeningDirect invite editor page.

# Client Configurable Features

**Candidate Invite via text message:** If you have completed the initial set-up requirements needed to send candidate invites via text message through your Sterling account, you will have the opportunity to enter the candidate's phone number on the Invite Summary page.




If you select the Candidate has consented to receive the invite as email and text message confirmation box, a phone number field will become available for you to enter in the candidate's information.

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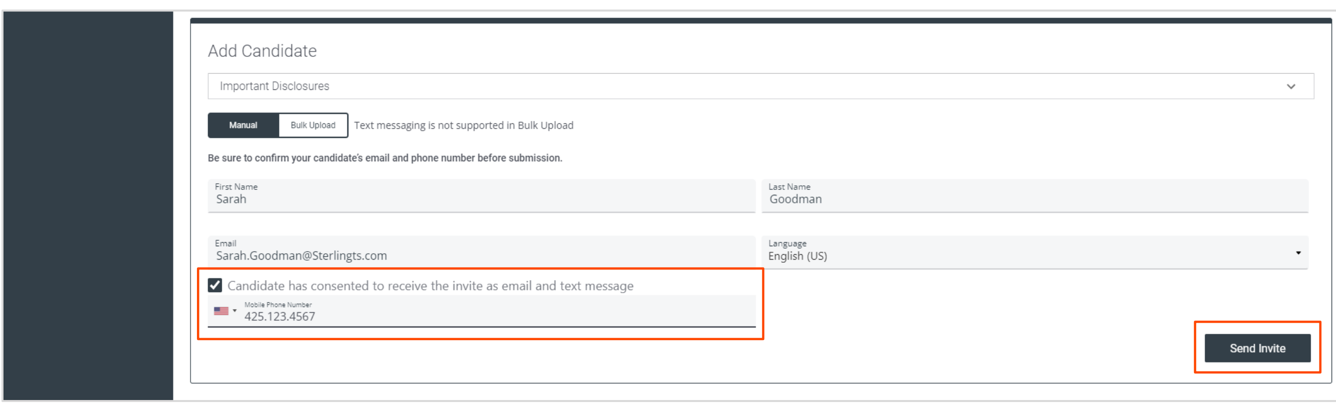
| **PLEASE NOTE** | **At this time, you will be able to provide a Canadian (+1), UK (+44), or US (+1), based mobile number in the phone number field.** |




By selecting this option, the screening invite will be sent via both email and text message to the candidate once you press **Send Invite**.

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| **PLEASE NOTE** | **Text messaging (SMS) is not supported for bulk invite as this time.** |