

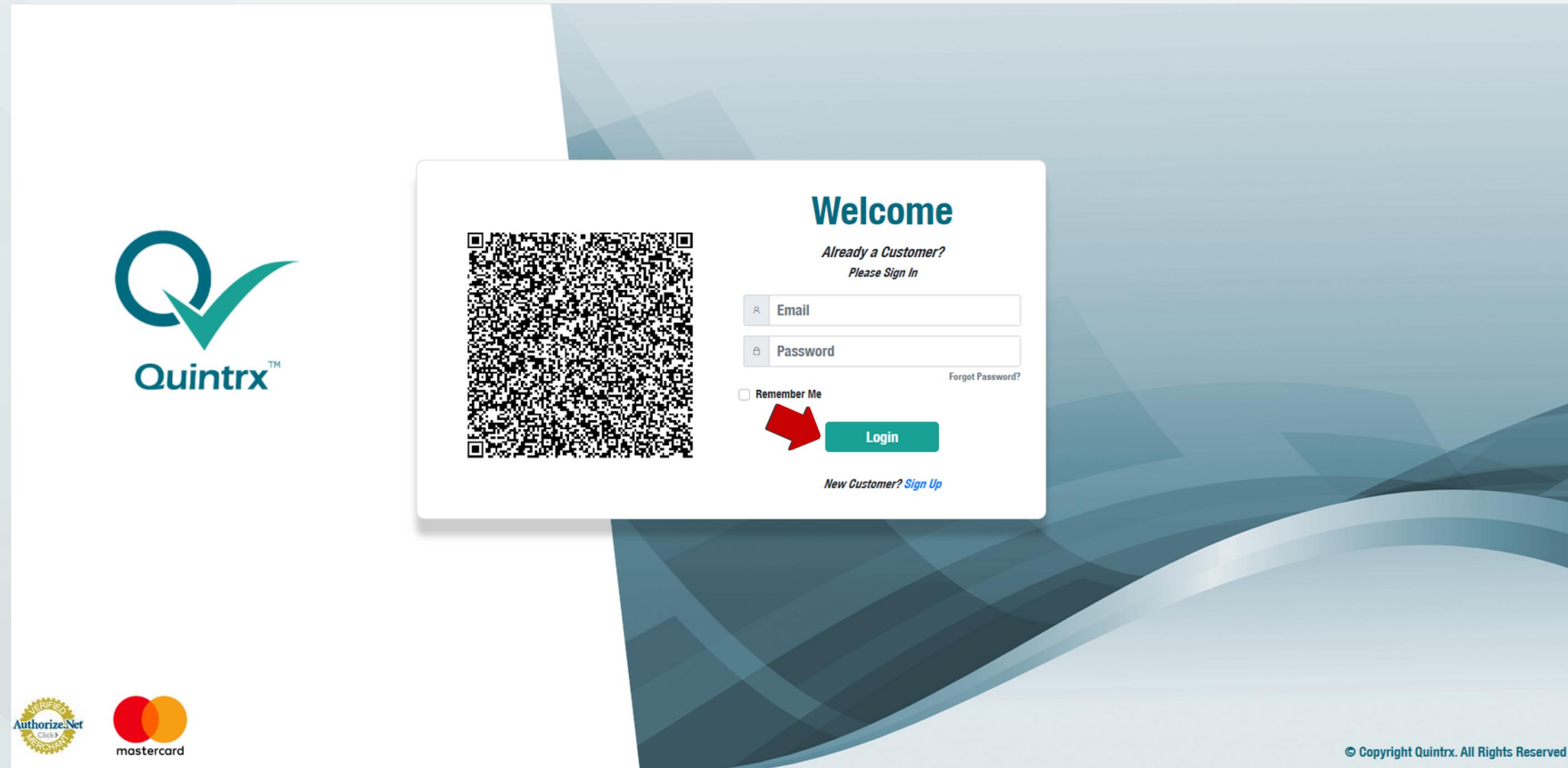


User Guide



Step by Step Flow

1. Click on the link <https://quintrx.com/> which is a login page. Enter email id and password and click on Login button.





Step by Step Flow

2. My Dashboard page will come. Then click on order report.
Order report will create an order for applicant.

The screenshot shows the 'My Dashboard' page. At the top, there is a navigation bar with links: Home, Order Report, Report, My Documents, My Profile, and Logout. Below the navigation bar, the title 'My Dashboard' is displayed. There are four circular icons representing different report categories: 'Order Report' (with a plus sign), 'Completed Reports(2)', 'Needs Attention(0)', and 'Achieved Reports(0)'. A large red arrow points to the 'Order Report' icon. Below these icons, there is a section titled 'CBSV News' containing a message about revised forms SSA-89 and SSA-89-SP. At the bottom left, there are payment logos for Authorize.Net and VISA.

Home | Order Report | Report | My Documents | My Profile | Logout |

My Dashboard

Order Report Completed Reports(2) Needs Attention(0) Achieved Reports(0)

CBSV News

The Social Security Administration published the revised Form SSA-89 (12-2020) (Authorization for the Social Security Administration (SSA) To Release Social Security Number (SSN) Verification) and Form SSA-89-SP (Spanish). You can access the revised forms in the CBSV Documents submenu located on the CBSV menu.

Please note:

- You have until September 30, 2021 to transition to the 12-2020 forms.
- SSA has NOT changed the signature policy for CBSV users, therefore these forms require a wet signature.
- We are not able to provide a fillable PDF for the SSA-89-SP.

VERIFIED
Authorize.Net
Click
Merchant

VISA



Step by Step Flow

3. Enter first name, middle name and last name.

The screenshot shows the 'Order Report' page with a red arrow pointing to the 'First Name' field in the 'Applicant Profile' section. The page includes fields for First Name, Middle Name, Last Name, Email Address, Date of Birth, Send email to e-sign, House/Apt #, Street Address, Zip code, Country, State, and City. At the bottom is a 'Select Package/Service' button. The footer features payment logos for Authorize.Net and Mastercard, and a copyright notice: '© Copyright Quintrx. All Rights Reserved'.

Home | Order Report | Report | My Documents | My Profile | Logout

Order Report

Applicant Profile

First Name

Middle Name

Last Name

Email Address

Date Of Birth mm/dd/yyyy

Send email to e-sign

House/Apt #

Street Address

Zip code

Country United States

State Search State

City Search City

Select Package/Service

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Click
Authorize.Net
MERCHANT

mastercard

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Step by Step Flow

3.1 Enter valid email and check the 'send email to e-sign' checkbox if you want the consent documents through email.

The screenshot shows the 'Order Report' page with a modal window titled 'Order Report' overlying the main content. The modal is titled 'Applicant Profile' and contains fields for First Name, Middle Name, Last Name, Email Address, Date of Birth, House/Apt #, Street Address, Zip code, Country, State, and City. A red arrow points to the 'Email Address' field, which has a checked checkbox next to it labeled 'Send email to e-sign'. At the bottom of the modal is a teal button labeled 'Select Package/Service'. The background of the page features a blue and white geometric design. Navigation links at the top include Home, Order Report, Report, My Documents, My Profile, and Logout.

Home | Order Report | Report | My Documents | My Profile | Logout

Order Report

Applicant Profile

First Name

Middle Name

Last Name

Email Address Send email to e-sign

Date Of Birth

House/Apt #

Street Address

Zip code

Country United States

State Search State

City Search City

Select Package/Service

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mastercard

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Step by Step Flow

3.2 If you don't want the consent document by email, enter your SSN number and uncheck the 'send email to e-sign' checkbox and enter valid email id.

The screenshot shows the 'Order Report' page with the 'Applicant Profile' section highlighted. The profile fields include First Name, Middle Name, Last Name, Email Address, Date Of Birth, Send email to e-sign (unchecked), Social Security # (with a red arrow pointing to the 'Enter SSN' field), House/Apt #, Street Address, Zip code, Country (United States), State, and City. At the bottom is a 'Select Package/Service' button. The Quintrx logo is in the top left, and navigation links (Home, Order Report, Report, My Documents, My Profile, Logout) are in the top right. Logos for Authorize.Net and AMER EX are at the bottom left, and copyright information is at the bottom right.

Order Report

Applicant Profile

First Name

Middle Name

Last Name

Email Address

Date Of Birth mm/dd/yyyy

Send email to e-sign

Social Security #

Enter SSN

House/Apt #

Street Address

Zip code

Country United States

State Search State

City Search City

Select Package/Service

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Click
Merchant

AMER EX

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Step by Step Flow

3.3 Select date of birth.

Home | Order Report | Report | My Documents | My Profile | Logout

Order Report

Applicant Profile

First Name Middle Name Last Name

Email Address Date Of Birth 

Send email to e-sign

Social Security # Enter SSN

House/Apt # Street Address

Country United States State Search State

Select Package/Service

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Step by Step Flow

3.4 Enter House/apt number, Street address and Zip code.

The screenshot shows the 'Order Report' page with the 'Applicant Profile' section highlighted. The page includes fields for First Name, Middle Name, Last Name, Email Address, Date of Birth, Send email to e-sign (checkbox), Social Security # (text input), Enter SSN (text input), House/Apt # (text input with a checkmark icon), Street Address (text input with a checkmark icon), Zip code (text input with a checkmark icon), Country (dropdown menu set to United States), State (dropdown menu labeled 'Search State'), City (dropdown menu labeled 'Search City'), and a 'Select Package/Service' button. The 'House/Apt #' field is specifically highlighted with a red arrow pointing to its input box.

Order Report

Applicant Profile

First Name

Middle Name

Last Name

Email Address

Date Of Birth mm/dd/yyyy

Send email to e-sign

Social Security #

Enter SSN

House/Apt #

Street Address

Zip code

Country United States

State Search State

City Search City

Select Package/Service

VERIFIED Merchant Click Authorize.Net

AMER EX

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Step by Step Flow

3.5 Select Country, State and City.

Home | Order Report | Report | My Documents | My Profile | Logout |

Order Report

Applicant Profile

First Name Middle Name Last Name

Email Address Date Of Birth

Send email to e-sign
Social Security #

House/Apt # Street Address Zip code

Country State City

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Step by Step Flow

3.6 Click on Select Package/Service button.

The screenshot shows the 'Order Report' page with the 'Applicant Profile' section. The profile fields include First Name, Middle Name, Last Name, Email Address, Date Of Birth, Send email to e-sign (checkbox), Social Security #, Enter SSN, House/Apt #, Street Address, Zip code, Country (United States), State, and City. A red arrow points to the 'Select Package/Service' button at the bottom left of the form. The top navigation bar includes links for Home, Order Report, Report, My Documents, My Profile, and Logout.

Home | Order Report | Report | My Documents | My Profile | Logout |

Order Report

Applicant Profile

First Name Middle Name Last Name
Email Address Date Of Birth mm/dd/yyyy

Send email to e-sign
Social Security # Enter SSN

House/Apt # Street Address Zip code
Country United States State Search State City Search City

Select Package/Service

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Step by Step Flow

3.7 Order Report page will come. You may select one or multiple packages.
Click on Place Order button.

The screenshot shows a web application interface. At the top, there's a navigation bar with links: Home, Order Report, Report, My Documents, My Profile, and Logout. The main content area has a title 'Order Report'. Below the title is a list of package options, each with a radio button. Some options have a checked status, indicated by a blue circle with a white checkmark. A red arrow points to the 'Criminal Check' option, which is checked. Another red arrow points to the 'Place Order' button at the bottom right of the list. At the very bottom of the page, there are payment method logos for Authorize.Net and American Express, along with a copyright notice: '© Copyright Quintrx. All Rights Reserved'.

- Basic Package-
- Criminal Check
- Terrorist Watch list
- ID Scan \u2013 Alerts
- FICO
- Sex Offender Registry
- Abuse Registry
- OIG
- SAM
- OFAC

[Back](#) [Place Order](#)

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AMERICAN
EXPRESS

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Step by Step Flow

4. Client Orders Report page will open, which shows the applicant report which we have created.

The screenshot shows the Quintrx Client Orders Report page. At the top, there are statistics: In-Progress : 5, Completed : 117, Archived : 1, Needs Attention : 0, and Canceled : 0. Below this is a search bar labeled "Search". The main content is a table titled "Client Orders" with columns: "Applicant Name", "Date", "Status", and "Action". The table lists six rows of data. A red arrow points to the second row, which corresponds to the applicant "Tammy Jordan". The "Action" column for this row contains a magnifying glass icon. At the bottom of the table, there are pagination controls: "Items per page: 15", "1 – 15 of 123", and navigation arrows. The footer of the page includes logos for Authorize.net Click Merchant and Mastercard, and a copyright notice: "© Copyright Quintrx. All Rights Reserved".

Applicant Name	Date	Status	Action
Beth Mwangi	2021-09-07T14:42:25.000+00:00	Completed	🔍
Tammy Jordan	2021-09-02T14:08:16.000+00:00	Completed	🔍
Jennifer McGee	2021-09-01T13:44:01.000+00:00	Completed	🔍
Lewis Sekatewa	2021-09-01T13:40:52.000+00:00	Completed	🔍
Lewis Sekatewa	2021-09-01T13:36:47.000+00:00	Completed	🔍
Halima Karim	2021-08-30T14:59:11.000+00:00	In Progress	📝



Step by Step Flow

4.1 Click on Reports tab. It shows all applicants report which we have created till now.

The screenshot shows the Quintrx Client Orders interface. At the top, there is a navigation bar with links: Home, Order Report, Report (which has a red arrow pointing to it), My Documents, My Profile, and Logout. Below the navigation bar, the title "Client Orders" is displayed. On the left side, there is a summary of application statuses: In-Progress : 5, Completed : 117, Archived : 1, Needs Attention : 0, and Canceled : 0. A search bar is also present. The main content area is a table titled "Client Orders" with columns: Applicant Name, Date, Status, and Action. The table lists six rows of data. At the bottom of the page, there are payment logos for Authorize.net and Mastercard, and copyright information: "© Copyright Quintrx. All Rights Reserved".

Applicant Name	Date	Status	Action
Beth Mwangi	2021-09-07T14:42:25.000+00:00	Completed	
Tammy Jordan	2021-09-02T14:08:16.000+00:00	Completed	
Jennifer McGee	2021-09-01T13:44:01.000+00:00	Completed	
Lewis Sekatewa	2021-09-01T13:40:52.000+00:00	Completed	
Lewis Sekatewa	2021-09-01T13:36:47.000+00:00	Completed	
Halima Karim	2021-08-30T14:59:11.000+00:00	In Progress	



Step by Step Flow

4.2 If you click on action tab, it will take you to applicants report page.

Home | Order Report | Report | My Documents | My Profile | Logout |

Client Orders

In-Progress : 6
Completed : 117
Archived : 1
Needs Attention : 0
Cancelled : 0

Search _____

Applicant Name	Date	Status	Action
Beth Mwangi	2021-09-07T14:42:25.000+00:00	Completed	
Tammy Jordan	2021-09-02T14:08:16.000+00:00	Completed	
Jennifer McGee	2021-09-01T13:44:01.000+00:00	Completed	
Lewis Sekatewa	2021-09-01T13:40:52.000+00:00	Completed	
Lewis Sekatewa	2021-09-01T13:36:47.000+00:00	Completed	
Halima Karim	2021-08-30T14:59:11.000+00:00	In Progress	

Items per page: 15 1 – 15 of 123 > >|

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Step by Step Flow

5. In applicants report page, you can view the document and also upload the signed document.

Quintrx™

Home | Order Report | Report | My Documents | My Profile | Logout

Applicant Report

Name : Halima Karim
Email : halima.karim7807@gmail.com
Selected Options : 5 Panel Drug Test,

Consent Documents

Sr. #	Document Name	Action	Upload Documents
1	Summary of Consumer Rights.html	View Document	<input type="button" value="Choose File"/> No file chosen
2	application_disclosure_form.html	View Document	<input type="button" value="Choose File"/> No file chosen
3	5 Panel Drug Test	View Document	<input type="button" value="Choose File"/> No file chosen

[View Report - In Progress](#)

VERIFIED Authorize.net Click Merchant

mastercard

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Step by Step Flow

6. Click on My Documents tab. My documents tab page contains all the agreements and policy documents. Which you can view at any time.

The screenshot shows the 'My Documents' section of the Quintrx website. At the top, there is a navigation bar with links: Home, Order Report, Report, My Documents (which has a red arrow pointing to it), My Profile, and Logout. Below the navigation bar, the title 'My Documents' is displayed. A search bar labeled 'Search' is present. The main content area is a table with two columns: 'Document Name' and 'Action'. The 'Document Name' column lists five files: PrivacyPolicy.pdf, TermsOfUse.pdf, CBSV.pdf, SAT.pdf, and MSA.pdf. The 'Action' column contains five 'View Document' buttons, each corresponding to one of the files in the list. Red arrows point to the 'My Documents' link in the navigation bar and to the 'View Document' button for the 'TermsOfUse.pdf' file. At the bottom of the table, there is a pagination control with the text 'Items per page: 5', '1 - 5 of 7', and navigation icons. The footer of the page includes logos for Authorize.net and American Express, and the copyright notice '© Copyright Quintrx. All Rights Reserved'.

Document Name	Action
PrivacyPolicy.pdf	View Document
TermsOfUse.pdf	View Document
CBSV.pdf	View Document
SAT.pdf	View Document
MSA.pdf	View Document



Step by Step Flow

6.1 To view any document, you have to click on view document button. If you click on CBSV.pdf then it will show that agreement document.

The screenshot shows a web application interface for managing documents. At the top, there is a navigation bar with links: Home, Order Report, Report, My Documents, My Profile, and Logout. Below the navigation bar, the title "My Documents" is displayed. A search bar labeled "Search" is present. The main content area is a table listing documents with their names and "Action" buttons:

Document Name	Action
PrivacyPolicy.pdf	View Document
TermsOfUse.pdf	View Document
CBSV.pdf	View Document
SAT.pdf	View Document
MSA.pdf	View Document

Two red arrows point to the "View Document" button for the "CBSV.pdf" row. At the bottom of the table, there is a pagination control with the text "Items per page: 5", "1 - 5 of 7", and navigation icons. The footer of the page includes logos for Authorize.net and American Express, and the copyright notice "© Copyright Quintrx. All Rights Reserved".



Step by Step Flow

6.2 If you want to see any particular document, enter the name of that document in search option.

The screenshot shows a web application interface. At the top, there is a navigation bar with links: Home, Order Report, Report, My Documents, My Profile, and Logout. Below the navigation bar is a large button labeled "My Documents". On the left side of the main content area, there is a search bar with the placeholder "Search" and the text "SAT" entered. A red arrow points to the search bar. To the right of the search bar is a table with two columns: "Document Name" and "Action". There is one row in the table, showing "SAT.pdf" in the "Document Name" column and a "View Document" button in the "Action" column. At the bottom of the table, there are pagination controls: "Items per page: 5" and "1 - 1 of 1". At the very bottom of the page, there are logos for Authorize.Net and American Express, and a copyright notice: "© Copyright Quintrx. All Rights Reserved".



Step by Step Flow

7. Click on My Profile tab. Under this tab, you will have three options:
Logout / Change password / Profile Details

The screenshot shows the Quintrx website interface. At the top left is the Quintrx logo. The top navigation bar includes links for Home, Order Report, Report, My Documents, My Profile (which is highlighted with a red arrow), and Logout. A dropdown menu for 'My Profile' is open, showing three options: Logout, Change Password, and Profile Details. The main content area is titled 'My Documents' and displays a table of documents with columns for Document Name and Action. The table contains five rows with document names: PrivacyPolicy.pdf, TermsOfUse.pdf, CBSV.pdf, SAT.pdf, and MSA.pdf. Each row has a 'View Document' button in the Action column. At the bottom of the table, there are pagination controls: 'Items per page: 5', '1 - 5 of 7', and navigation arrows. In the bottom left corner, there is an Authorize.net Click Merchant logo, and in the bottom right corner, the copyright notice '© Copyright Quintrx. All Rights Reserved'.

Document Name	Action
PrivacyPolicy.pdf	View Document
TermsOfUse.pdf	View Document
CBSV.pdf	View Document
SAT.pdf	View Document
MSA.pdf	View Document



Step by Step Flow

7.1 Click on profile details option. It shows you Individuals profile details and Company Profile details. Here you can edit any details.

The screenshot shows the 'Edit Profile Details' page. At the top right, there is a navigation bar with links: Home, Order Report, Report, My Documents, My Profile, and Logout. The main content area has two sections: 'Individual Profile Details' and 'Company Profile Details'. Red arrows point to the 'Individual Profile Details' section and the 'Company Profile Details' section. Both sections contain various input fields for user information. At the bottom left, there are logos for Authorize.Net and American Express.

Edit Profile Details

[Upload New Profile Picture](#)

Individual Profile Details

First Name	Last Name	
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	
Email	Phone Number	
<input type="text" value="Email Address"/>	<input type="text"/>	
Address		
<input type="text" value="Street Name"/>	<input type="text" value="Suite/Apt. #"/>	<input type="text" value="Zip Code"/>
Company Registered Name	Employer Identification #	Website
<input type="text" value="ABC pvt ltd"/>	<input type="text" value="XX-XXXXXX"/>	<input type="text" value="www.abc.com"/>
Contact First Name	Contact Last Name	
<input type="text" value="First Name"/>	<input type="text"/>	
Contact Email	Phone Number	
<input type="text" value="Last Name"/>	<input type="text" value="Phone Number"/>	
Address		



Step by Step Flow

7.2 Click on upload new profile picture button which uploads any profile picture you want.

The screenshot shows the 'Edit Profile Details' page. On the left, there's a sidebar with the Quintrx logo and a navigation menu. The main area has sections for 'Individual Profile Details' and 'Company Profile Details'. In the 'Individual Profile Details' section, there is a red arrow pointing to a purple button labeled 'Upload New Profile Picture'. Below this button is a file input field. A second red arrow points to the 'Open' button in a file selection dialog window titled 'Open'. The dialog shows a folder path and a list of files, including 'inner-banner-1', 'mastercard.', 'LinkedIn_MC', 'lock', 'logo', 'QR-Code', and 'UIUX-MockUp1.1'. At the bottom of the dialog, there are 'Open' and 'Cancel' buttons, with the 'Open' button being highlighted by a red arrow.



Step by Step Flow

7.3 Click on Update button, in order to save the changes, you have done.
After clicking on Update button, you will get “User details updated” message.

[Upload New Profile Picture](#)

Individual Profile Details

First Name	Last Name	
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	
Email	Phone Number	
<input type="text" value="Email Address"/>	<input type="text"/>	
Address		
<input type="text" value="Street Name"/>	<input type="text" value="Suite/Apt. #"/>	<input type="text" value="Zip Code"/>

Company Profile Details

Company Registered Name	Employer Identification #	Website
<input type="text" value="ABC pvt Ltd"/>	<input type="text" value="XX-XXXX"/>	<input type="text" value="www.abc.com"/>
Contact First Name	Contact Last Name	
<input type="text" value="First Name"/>	<input type="text"/>	
Contact Email	Phone Number	
<input type="text" value="Last Name"/>	<input type="text" value="Phone Number"/>	
Address		
<input type="text" value="1"/>	<input type="text" value="Suite/Apt. #"/>	<input type="text" value="Zip Code"/>

Update

A red arrow points to the "Update" button, which is highlighted with a teal background and white text.



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Step by Step Flow

7.4 Click on change password option, which changes your password.

✓ Enter old password ✓ Enter new password ✓ Enter confirm password

The screenshot shows the Quintrx website interface. At the top left is the Quintrx logo. Along the top right are navigation links: Home, Order Report, Report, My Documents, My Profile, and Logout. Below the header is a large, semi-transparent watermark graphic of a blue and white abstract wave or ribbon design. In the center, a white rectangular dialog box is titled "Change Password". It contains three input fields with accompanying icons: a checkmark icon next to "Enter Old Password", a checkmark icon next to "Enter New Password", and a checkmark icon next to "Confirm Password". Below these fields is a teal-colored button labeled "Reset Password". A red arrow points from the bottom right towards this "Reset Password" button. At the bottom of the page, there are payment method logos for Authorize.net and Mastercard, and a copyright notice: "© Copyright Quintrx. All Rights Reserved".



Step by Step Flow

7.5 Click on Reset password button. After clicking you will get “Password changed successfully” message.

The screenshot shows a 'Change Password' modal window centered on a web page. The modal has a white background and a shadowed border. At the top, it says 'Change Password'. Below that is a green button with the text 'Password Changed Successfully' in white. To the right of this button is a red arrow pointing towards the 'Reset Password' button at the bottom. The modal also contains three input fields: 'Enter Old Password', 'Enter New Password', and 'Confirm Password', each with a small eye icon to the right. At the very bottom of the modal is a teal button labeled 'Reset Password' in white. In the background, the main website's header is visible, showing navigation links: Home, Order Report, Report, My Documents, My Profile, and Logout. The footer of the website includes logos for Authorize.Net and Mastercard, and a copyright notice: '© Copyright Quintrx. All Rights Reserved'.



Step by Step Flow

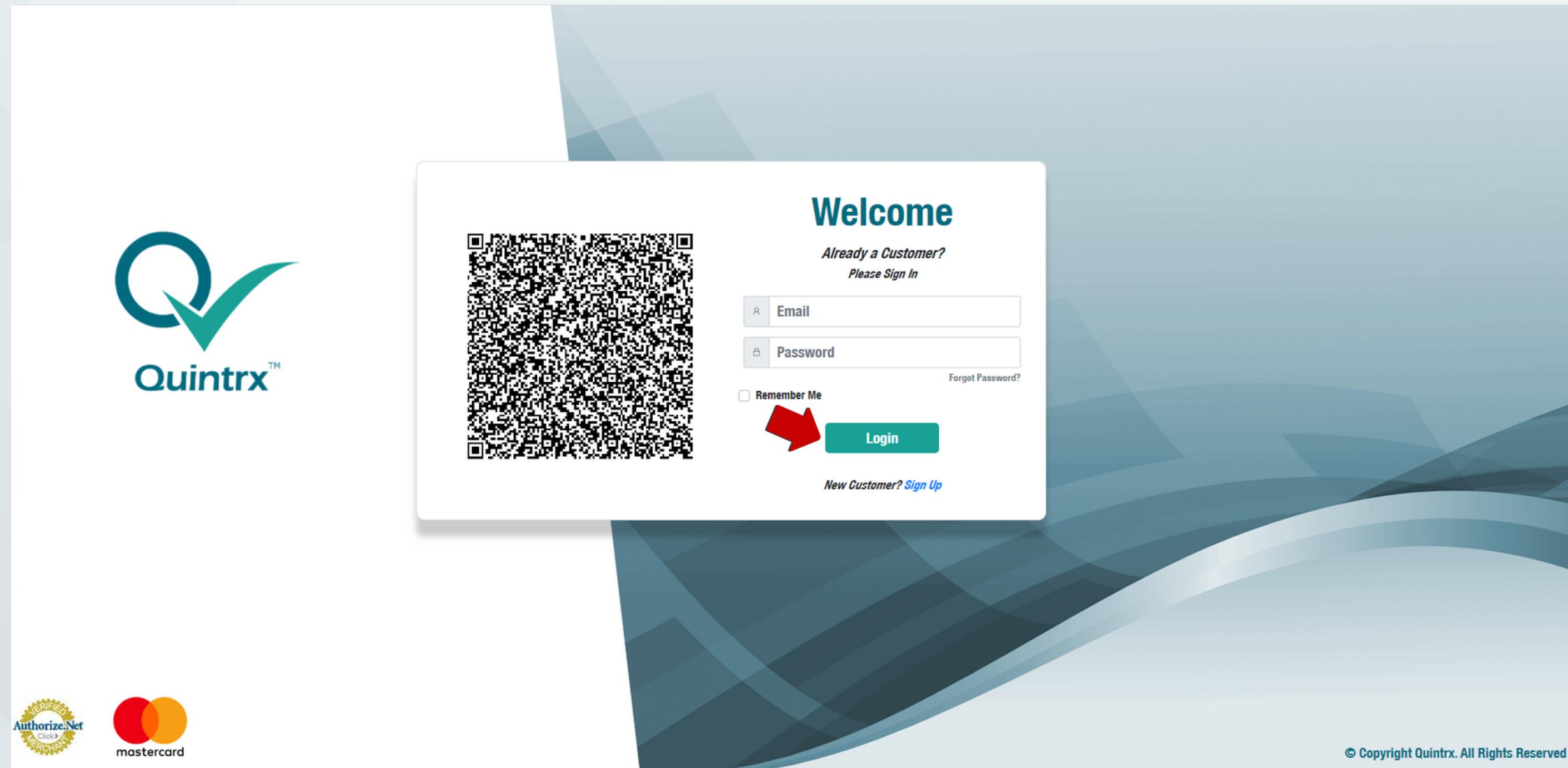
8. Click on Logout tab. You will be logged off from this account.

The screenshot shows a web browser window with the Quintrx logo in the top left corner. The top navigation bar includes links for Home, Order Report, Report, My Documents, My Profile, and Logout. A red arrow points to the 'Logout' link. A central modal window is titled 'Change Password'. It contains a green success message box that says 'Password Changed Successfully'. Below this are three input fields: 'Enter Old Password', 'Enter New Password', and 'Confirm Password'. At the bottom of the modal is a teal 'Reset Password' button. The background of the page features a blue abstract graphic design. At the bottom of the page, there are payment method logos for Authorize.Net and Mastercard, and a copyright notice: '© Copyright Quintrx. All Rights Reserved'.



Step by Step Flow

8.1 Once you logout, you will be redirected to login page.





Contact Us

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