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## INSTASCREEN™ USER EXPERIENCE

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### §. GENERAL INSTRUCTIONS

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#### **Welcome to the InstaScreen™ User Experience!**

We are upgrading InstaScreen™ with world class technologies that ensure cross-platform compatibility, browser independence, responsive design, support for mobile devices, and improvements to day-to-day workflows.

Over the next few months, you will see changes to the “look and feel” of InstaScreen™ (we’re calling it version 2.5) that will deliver a professional, consistent user experience. Along with the aesthetics, productivity improvements are being introduced to help your business continue its success.

As you look around the new system, please note that only the Navigation, Home, MyProfile, Help and Order areas have been redesigned. Workspace, Admin and Utilities have not been redesigned yet, however you will find a few areas within these that have some changes, such as the Report Results page and the Client Configuration page.

#### **Key Features and Changes**

Beginning with the initial page where you log into your InstaScreen™ website, you will see our new look and feel. Throughout this User Guide, various pages and functions will be highlighted to help you identify the changes and improvements that are a result of our User Experience Project work.

#### **Browsers and Devices**

As InstaScreen™ is upgraded, it will support the **latest versions of Internet Explorer, Chrome, Firefox, Safari and Opera browsers**. Your device can be a desk-top, a laptop or even a tablet, such as an iPad or Surface. You may access your website on devices running Microsoft Windows 7, Microsoft Windows 8, or Apple’s Mac OS-X. You may find that other devices using one of the supported browsers work fine, too.

#### **Ease of Use**

With the implementation of InstaScreen™ version 2.5, we begin to streamline process flows and find ways to minimize the manual labor aspects of performing background checks and searches. Beginning with the Order Entry Wizard, a number of improvements have been made to make ordering searches easier.

The new “look and feel” provides users with a more consistent and intuitive interactive experience. As we continue to update all areas of the software platform, you will find many user-requested features advanced at the TazWorks User Group meeting, as well as improvements from our design and development teams.

## **Customer Support**

As you use InstaScreen™, please feel free to share your thoughts with us via email sent to [support@tazworks.com](mailto:support@tazworks.com). Or you may call our Customer Support team at (801) 572-7401 (option 2). In addition, we have opened a new Customer Service Desk portal where you can log in as a user (with your email address)

<https://tazworks.atlassian.net/servicedesk/customer/portal/1> any time, any day to request assistance and suggest new features. This new portal allows you to track your own requests.

## **2. KEY FEATURE LIST**

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### **List of Key Features to Date**

1. Restructured pages to be cross-platform compatible, supporting all current versions of browsers. Note that some pages and popups have not been changed yet, but will be in the coming weeks.
2. Added responsive behavior to support use of InstaScreen™ on desktop, laptop and tablet devices.
3. Redesigned navigation layout for better responsiveness and use of space.
4. Redesigned Home page layout and replaced the Help and Logout buttons with the Username Dropdown button. Also removed sidebar menu and moved content to MyProfile.
5. Added a new editor for News & Announcements that allows better layout options and a consistent approach to adding, editing and formatting content. This editor is used in other InstaScreen™ text areas that can be displayed to end-users, such as User Certification and Ordering Certification.
6. Added the Edit (pencil) icon next to the News & Announcements label that allows access to the new editor.
7. Replaced text-only labels on buttons with icon plus text labels. Icons provided a visual cue for specific types of actions that are available to the user, such as Add (+), Remove (x), Edit (pencil), View (paper), Print (printer), Preview (eye), and so on.
8. Software News section added to Home page using an automatic news feed. This new section will be used for announcements related to InstaScreen™ software, such as Release Notes that will be shared with CRA users. This section is optional and can be turned off under User Permissions.
9. Clicking on the Software News headline will open up the most recent article in full. In the near future, additional features will be added to allow authorized users to find and read previous articles in an archive.
10. Added the Contact Us section to the Home page. Note that extremely long email addresses may extend beyond the edge of the space. This issue will be resolved in the near future.
11. Restyled the Help window to save space. Added the duration times for training videos so that users can plan sufficient time to view individual videos.
12. Added a 'monitor/screen' icon to the upper right corner of the Help window that will show the software version and the server number when the user points at it with a mouse (hover).
13. Created MyProfile, accessed through the Username Dropdown button that includes tabbed sections for the logged-in user's Personal information, Preferences, Security settings, Password Security information and Password Recovery.

14. Redesigned all Order Entry pages including new features on Address, Residence Verification, Employment Verification, Education Verification and many other search-specific data entry pages.
15. Overhauled "Rolodex" to be 'Contacts Lookup' with a new look and feel.
16. Added new features to 'Contacts Lookup' that allow authorized users to add or edit contact details without having to leave Order Entry.
17. County Lookup redesigned and improved throughout Order Entry area.
18. State Lookup redesigned and improved throughout Order Entry area.
19. Federal District Lookup redesigned and improved throughout Order Entry area.
20. Country Lookup redesigned and improved throughout Order Entry area.
21. Restricted duplicate product names so that result reports and detail reports display properly.
22. Redesigned and reorganized Client Configuration page and all sections.
23. Improved workflow when adding a new Client to eliminate partial record creation.
24. Improved workflow when editing Client information.
25. Healthcare Compliance Search now supports multiple vendors via Vendor Routing.
26. Default Product Notes can be set up once and then copied Client's Product Notes with a single click.
27. Restyled Client Configuration area with reorganized tabs and workflows. Data entry areas appear when appropriate. Adding a new Client is similar to the previous method except that tabs for other client configuration settings are not displayed until they are available for entry. This altered display flow reduces the risk of creating incomplete Client records.
28. Add Client Instructions that can be displayed on a Client's screen when the Client User is selecting a Product or Selecting a Search. This new field uses the new editor (same as News & Announcements). Client Instructions can be turned on or off with the check of a box.
29. The User Certification field uses the new editor and includes a clickable preview icon that will display how the content will appear.
30. The Ordering Certification field uses the new editor and includes a clickable preview icon that will display how the content will appear.
31. Added the ability to activate or disable a Client User with a single click without having to edit the user record. However, activating or disabling a user can still be done using the edit function.
32. Added a new field for a Client's Custom Disclaimer for a Product/Package that will eventually be available for display on individual reports.
33. Reorganized Client's Billing area by grouping related options together and labeling the groups.
34. Added an option so that an authorized CRA User can disable a user's ability to change their MFA, email or phone number information.
35. Revised DOT-PSP functionality and credential management.
36. Revised embedded Quick App for Employment, Student, Volunteer and Tenant with improved workflow and better exception/error handling.
37. Updated FCRA and other required disclosures.
38. Redesigned Researcher user workspace to improve ability to work and track work.
39. Redesigned Researcher's Employment Verification page and added QuickCopy features.
40. Updated Researcher's view of the Vendor Audit Report to provide researcher-specific information.
41. Added a new system-wide messaging tool to allow TazWorks Support Team to notify users of system-wide events, such as a scheduled maintenance.
42. Revised the process of creating and sending emails via InstaScreen™ sites to

- reduce the likelihood that the email messages will be identified as spam or junk mail.
43. Redesigned display of Select Client for Order page and added capability to click anywhere on the row to select a client (not just on the client's underlined name).
  44. Redesigned display of Select Product for Order (package) page and added capability to click anywhere on the row to select a product package (not just on the 'Order' button).
  45. Redesigned look and feel of Select Searches for Order page. User can select searches by clicking on the checkbox or on the search name.
  46. Added ability to add Order Notes (Order Entry Notes) before sending a QuickApp™.
  47. Added a separate, new Applicant's Notes that can be completed by a QuickApp™ Applicant. These are appended to the Order Entry Notes on the Report Results page.
  48. On the Applicant page, clicking the '+Another Name' button will add a new bordered section for the user to enter alias or other name information for the applicant. Multiple names can be added. Each bordered section can be removed independently of the others.
  49. On the Applicant's Address page, clicking the 'Add Previous Address' button will add a new bordered section for the user to enter a previous address. Multiple previous addresses can be added. Each bordered section can be removed independently of the other previous address sections.
  50. On the Applicant's Address page, if the Number of Previous Addresses has a value set (in Product Configuration), the system will interrupt the User from proceeding to the next page if fewer than that number of previous addresses is entered. A checkbox will be displayed to allow the user to skip the requirement for a number of previous addresses.
  51. On the Applicant's Address page, if the number of previous addresses entered is less than the amount requested (as set in product configuration), an alert will advise the user and allow the user to check a box to indicate that no additional addresses can be added.
  52. On the Residence Verification page, clicking the 'Add Previous Residence' button will add a new bordered section for the user to enter a previous residence. Multiple previous residences can be added. Each bordered section can be removed independently of the other addresses.
  53. On the Residence Verification page, a residence must now be identified by type: 'Rent', 'Own', 'Friend/Family'. If Rent or Friend/Family is selected, data entry fields for landlord are displayed and available for entry. If Own is selected, no landlord data entry fields will appear. Also, the new Contacts Lookup link only appears for 'Rent' or 'Family/Friend' types.
  54. On the Employment Verification page, clicking the 'Add Current Employer' button will add a new bordered section for the user to enter additional current employers. Multiple Current Employers can be added. Each bordered section can be removed independently of the other Current Employer sections.
  55. On the Employment Verification page, clicking the 'Add Previous Employer' button will add a new bordered 'Previous Employer' section. Multiple Previous Employers can be added. Each bordered section can be removed independently of the other Previous Employer sections.
  56. On the Education Verification page, clicking the 'Add Institution' button will add a new bordered 'Institution' section. Multiple educational institutions can be added. Each bordered section can be removed independently of the others.
  57. Improved display and functionality of Batch Order Import page and process.
  58. Added more fields that can be used when importing orders via Batch Order Import process.

59. Improved display and functionality of Applicant Pending page, including the ability to edit the applicant's email address and to send emails without editing individual records.
  60. Improved display and functionality of Applicant Ready page.
  61. Improved display and functionality of XML Ready page.
  62. Increased phone extension fields from 4 to 6 digits for the number of digits allowed for phone extension.
  63. Added 'Display Photo' option to Sex Offender Records Search.
  64. Removed 'Unlimited' for Florida MVR searches in Instant Driving Records Search.
  65. Added Employer Country and Education Country to XML Ordering and Batch Imports in preparation of improved processing of international searches.
  66. Redesigned and improved functionality of Report Results page and placed File Number, Applicant Name, Reference, Client and Requester information at the top of the page while leaving the same data in the detail.
  67. On the Report Results page, moved the Order Status and Report Decision items to the top.
  68. The Report Results page uses collapsible sections with a User setting to allow for open or closed by default. Closed sections improves security, too. Individual users can set their preference under their MyProfile options.
  69. Report Results action buttons are located together on a row at the top and at the bottom of the page instead of scattered about the page. The old 'Add to Order' button (that added a search to the order) is now called 'Add New Search'.
  70. Search Results take up less space with a single column of linked information.
  71. Search Results action buttons with text labels have been replaced with simple + (add), x (remove) and other action buttons.
  72. Search Results section shows the status of each search in color.
  73. Session Timeout warnings are displayed on all pages (not just in Search Editor). A modal will prompt the User to renew the session or be logged out automatically.
- Additional features will be to be added as InstaScreen™ continues to progress...

### 3. ACCESS AND LOGIN

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Access your InstaScreen™ website at your assigned domain name (URL) and you will see a screen similar to the following:

yourcompany.com

Welcome to InstaScreen 2.5 Beta! We hope you enjoy your experience exploring the ongoing changes and improvements of the background screening industry's best software.

**NOTICE:** The use of this system is restricted. Only authorized users may access this system. All Access to this system is logged and regularly monitored for computer security purposes. Any unauthorized access to this system is prohibited and is subject to criminal and civil penalties under Federal Laws including, but not limited to, the Computer Fraud and Abuse Act and the National Information Infrastructure Protection Act.

Tazworks  
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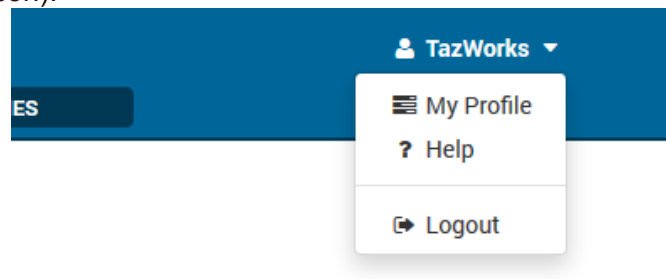
The new system messaging is shown (green in the above example). System messaging will notify users at Login of important system-wide issues, such as a scheduled maintenance.

#### 4. HOME, USERNAME, MY-PROFILE, HELP AND LOGOUT

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##### Home and UserName

After login, you will land on the new Home page. Please note that there is no secondary menu sidebar. It has been removed and the “My Profile” areas are now found through the UserName dropdown, along with access to Help and to Logout. The UserName dropdown is located in the upper right of the page. You open the dropdown by clicking on the UserName (or down-triangle icon):



The new Home page contains the News & Announcements section and a Contact Us section. A new optional-display section may also appear: Software News. The Software News section will show release notes, software updates and other items of interest for CRAs.



COMING SOON

File Number  Search

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Welcome Scott

Your last login was on 12-04-2014 12:40 PM MST


News & Announcements

Welcome to InstaScreen™ 2.5 SNEAK PEEK!

After exploring the new look and feel of InstaScreen™ 2.5, please share your ideas and comments with us via email to [ux@tazworks.com](mailto:ux@tazworks.com).

- This is pretty cool. Just a few adjustments!
- [Explore the Home and Order areas](#)
- Try out the News & Announcement editor where you can change this content (below this part, please!)

Visit [TazWorks.com](http://TazWorks.com)



We can honestly add whatever we want?! Gee, thanks TazWorks! :)

Software News

InstaScreen™ Announcement

10/08/2014

From time to time we will provide additional information about InstaScreen and upcoming oppo...

Contact Us

Phone: 801-572-7401  
Toll Free Phone: 800-555-1212  
Fax: 801-555-2121  
Email: [ux@tazworks.com](mailto:ux@tazworks.com)

UX

1192 East Draper Parkway #401  
Draper, UT 84020

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## News & Announcements

To edit the News & Announcements, click the ‘Edit’ (pencil) icon. You will see this pencil-icon whenever something can be edited. Once clicked, you will go to the Edit News & Announcements page that has a completely new editor that allows you to use HTML, text-formats, font-colors and styles, background colors, hyperlinks, images and more. Note that this editor will be used throughout the new InstaScreen™ 2.5 system for many text areas.

COMING SOON

File Number  Search

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Edit News & Announcements

When inserting an item link, use a fully qualified URL (i.e. [http\(s\)://domain name/-requestedresource-<extension>](http(s)://domain name/-requestedresource-<extension>)).  
Unqualified URLs may result in your users being logged off the system.  
For proper responsiveness, please limit image files to .png format (not .jpg, .gif, etc.).

B

I

U

11

Helvetica Neue


A

Welcome to InstaScreen™ 2.5 SNEAK PEEK!

After exploring the new look and feel of InstaScreen™ 2.5, please share your ideas and comments with us via email to [ux@tazworks.com](mailto:ux@tazworks.com).

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- [Explore the Home and Order areas](#)
- Try out the News & Announcement editor where you can change this content (below this part, please!)

Visit [TazWorks.com](http://TazWorks.com)



We can honestly add whatever we want?! Gee, thanks TazWorks! :)

Cancel

Save

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## Software News

The optional, new Software News section found on the Home page is controlled by a User Permission under Manage CRA for each CRA User. When Software News is actively displayed, it will contain the headline, date and the beginning of the most recent announcement from TazWorks that is intended for viewing by CRAs only. These news items will not be displayed to the public. To view the entire article, click on the headline.

Page 7

**Software News**

**InstaScreen™ Announcement**  
10/08/2014  
From time to time we will provide additional information about InstaScreen and upcoming oppo...

## Contact Us

The Contact Us section is now displayed directly on the Home page instead of on a separate

**Contact Us**

Phone:	<b>801-572-7401</b>
Toll Free Phone:	800-555-1212
Fax:	801-555-2121
Email:	<a href="mailto:ux@tazworks.com">ux@tazworks.com</a>

**UX**  
1192 East Draper Parkway #401  
Draper, UT 84020

page.

## Username Dropdown

In the upper right corner of the screen, an icon and your name will appear with a down-triangle. This is the Username Dropdown. Clicking on it will open up a selection of actions that you can perform: MyProfile, Help and Logout.

Scott ▾

☰ My Profile

⚙ ? Help

🚪 Logout

## My Profile

With InstaScreen™ 2.5, we have combined the user's personal information, preferences and security information into a single page: the MyProfile page. This page is found by clicking on the Username dropdown (upper right corner) and selecting MyProfile from the list.



### My Profile

PersonalPreferencesSecurityPassword SecurityPassword Recovery

\* First Name:

Last Name:

Job Title:

Email:

Phone Number:

Ext:

Alt. Phone:

Fax:

Cancel

Save

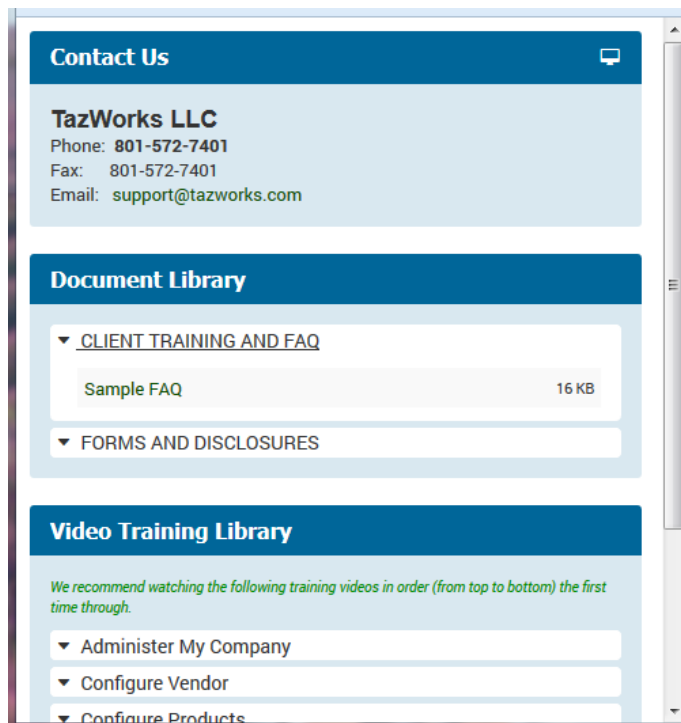
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MyProfile is organized into five areas represented by separate tabs: Personal, Preferences, Security, Password Security, and Password Recovery information.

Previously these five areas were accessed through Home page sidebar menu links.

## Help

The Help popup window has been restyled. The icon in the upper right hand corner of the Help window will display the version and server information of your session.



The top section is the Contact Us information (TazWorks' information for CRAs).

The next section is the Document Library with collapsed lists of your documents, grouped by Section Name as defined in your Manage Document Library area. Clicking on a Section Name will open (or close) the section with its list of links to documents.

The next section is the Video Training Library divided into collapsed sections. Clicking on a section heading will open (or close) the section with its list of video titles and durations.

Clicking on an individual entry for either the Document Library or the Video Training Library will open the selected item (document or video) in a new browser window.

## **Logout**

The Logout action is now listed under the Username Dropdown. In addition, Users have an Inactive Session Time-out setting that will display a warning when there are 3 minutes left before being automatically logged off the system.

## **5. ORDER ENTRY**

The new Order Entry area has changed and continues to change. New Order, Batch Order, Draft Orders, Applicant Pending, Applicant Ready and XML Ready have been revamped and improved with a consistent look and feel.

### **New Order:**

Most of the significant changes to date for InstaScreen™ 2.5 can be found in the New Order entry pages with new features and functionality to simplify workflow. Most pages will contain a 'Next' button to continue through the order process. The 'Cancel' button will exit the order entry process without saving any entered data. The 'Save Draft' button will exit the order entry process but will save your work as a Draft Order (see Draft Order section).

New table navigation tools have been built into the redesigned start pages for each of the order management areas: New Order, Batch Order, Draft Orders, Applicant Pending, Applicant Ready and XML Ready. Moving among table listings is now presented more consistently from page to page.



Items per page: 15 ▼

Showing 1 to 15 of 91 clients.

### **Select Client for Order**

The new Select Client for Order page has been redesigned so filtering and selecting are easier. When you click on the New Order sidebar menu link, as a CRA user you will see the Select Client for Order page with your cursor in the 'Find Client' filter box. As you enter letters, the list of clients in the displayed table is altered to match.

To select a Client for the new order, you may click anywhere in that Client's row of information. You are no longer required to click the client's name link.

COMING SOON

File Number  Search

Scott ▼

HOMEORDERWORKSPACEADMINUTILITIES

ORDER

New OrderBatch OrderDraft OrdersApplicant PendingApplicant ReadyXML Ready

Select Client for Order

Company Name ▲	Code ▲	Contact ▲	Phone ▲	Fax ▲
AAA Client	aaa1	Henry Ford	555-555-5555	555-555-5555
AAA Substitute End User	Test 05	Test 05	-	-
Aarrons Real Estate	CLASS	Burt	-	-
ABC Employer, Inc.	Employment Company	Contact Name	888-555-1212	-
ABC Tenant, Inc.	Tenant Company	Contact Name	888-555-1212	-
ABC Volunteer, Inc.	Volunteer Company	Contact Name	888-555-1212	-
All South Investigations	0004_	John	205-590-1026	-
Alternate Client Name	00003	William	205-972-1111	555-555-3333
AMP	amp	amp	-	-
AMP 2	ampcopy	Contact-Name/co	-	-
AMP Child	AMP2	AMP Child	-	-
Amy's Company	0000001	Amy Strate	-	-
Armory Confidential Services	00005	Stewart	205-680-0034	-
B Christie's Client	2355	Christie	222-2222	111-1111
Big Bad Client	BBC	Bill Bugsby	-	-

Items per page: 15 ▼

Showing 1 to 15 of 91 clients.

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### **Select Product for Order**

The new Select Product for Order page has been redesigned so selecting a product package is easier.

To select a Product package for the new order, you may click anywhere in the space containing the Product Name and Description. You are no longer required to click the ‘Order’ button.

Another new feature is the optional display of Client Instructions at the top of the selections. Client Instructions are set by a CRA User and should contain information to help the client select the correct Product package or remind the client of any specific requirements.

COMING SOON

File Number  Search  Go

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

ORDER

New Order

Batch Order

Draft Orders

Applicant Pending

Applicant Ready

XML Ready

Select Product for Order

SSD Client

Client Instructions to be displayed for a Client user to help with their work...

Order

CRIMINAL BACKGROUND CHECK

Includes county, state and national criminal background checks

Order

EMPLOYMENT CHECK

Employment check that reviews residence, employment, education and references

Order

INVESTIGATIVE SEARCHES

Select one of a number of different investigative searches individually or in combination with other searches

Order

MVR CHECK

Order

RESIDENCE CHECK

Tenant screening with residence verification only

Order

SSD

Order

TENANT PACKAGE

Tenant screening package including credit report and score, residence verification, employment verification, reference check and tenant scorecard pro

Order

TENANT SCORECARD PRO

Product Description goes here

Order

VERIFICATIONS & CREDENTIALS

A list of verification and credential searches

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Order Data Entry

The individual pages that are presented for any given order depend on the types of data required for the selected Searches of the Product package for the Order. Throughout the Order Data Entry pages, icons and labels are used consistently to improve ease of use and workflow. Bordered sections indicate related data and can be added or removed. Messages and alerts may appear in your tertiary/info color, or in green (success), yellow (warning) and red (danger).

Select Searches for Order

On the Select Searches for Order page, you select the searches to be included in the order by clicking on one or more checkboxes, or you may click on the name of the entry, too.

Client Instructions can be displayed on this page as well as Client’s Product Notes. Both Client Instructions and Client’s Product Notes are created in the Admin area of Client Configuration.

If an embedded QuickApp™ will be used with this Product package, the QuickApp™ button will be displayed, otherwise only the 'Next' button will be shown.

COMING SOON

File Number Search Go

Scott

HOME ORDER WORKSPACE ADMIN UTILITIES

ORDER

New Order

Batch Order

Draft Orders

Applicant Pending

Applicant Ready

XML Ready

Select Searches for Order

SSD Client

Client Instructions to be displayed for a Client user to help with their work...

# PRODUCT NOTES

CLIENTS PRODUCT NOTES FOR EMPLOYMENT CHECK

Verification

☒ Residence Verification

☒ Employment Verification

Credentials

☐ Professional License

☒ Education Verification

☐ Instant Driving Records

\* Requestor (SSD Client)

Kai, Anika

Cancel

QuickApp™ or Next

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### QuickApp™ Order

If the QuickApp™ is being used for the Order, the QuickApp™ Order page will display. In addition to the Applicant's name, Applicant's email (To Applicant's Email Address), 'From Sender' email address and Order Notes, there may be other applicant-related fields.

To send a QuickApp™ application via email to a single Applicant, you will click the 'Send' button, but if you wish to send out applications to many different applicants, you will click the 'Send & Next' button. 'Send & Next' allows you to send a new email for another Applicant each time it is clicked.

COMING SOON

File Number  Search

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

QuickApp™ Order

SSD Client  
Employment Check

\* Reference:

Applicant:

\* Last Name

\* First Name

\* To Applicant's E-mail Address:

\* From Sender's E-mail Address:

Order Notes:

Cancel

Send & Next

Send

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## Applicant:

As with most of the Order Data Entry pages, the Applicant page has been restyled to allow for data entry on different sized devices. Groups of data entry fields will resize and reposition depending on the size of your viewport.

COMING SOON

File Number  Search

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Applicant

SSD Client - Tenant Package  
Order Entry step 1 of 6

PRODUCT NOTES

CLIENT'S PRODUCT NOTES FOR TENANT PACKAGE

Reference:

Referred By:

Monthly Income:

Monthly Rent:

Desired Unit:

Position/Title:

Proposed Salary:

Billable:

Cost Code:

Job Code:

Job Location:

Employment State:

Field A:

Field B:

Field C:

Applicant Info

\* Last Name:

\* First Name:

Middle Name:

Gen:

\* SSN:

\* DOB:

Phone Number:

E-mail Address:

Driver License No.:

DL State:

Sex:

Race:

+ Another Name

Cancel

Presearch

Next

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When adding Another Name (or Alias), you will click the '+ Another Name' button which will open a container with the appropriate data entry fields. The new section is framed with a border that has a faded-red 'X' in the upper right corner. Clicking on this 'X' will remove the bordered section. Bordered sections can be removed in any order.



## Presearch

Clicking the 'Presearch' button will take you to the Presearch page which lists previous orders that are for the same applicant name, SSN or email. This allows you to determine if you wish to see an existing order or if you wish to continue with a new order.

## Applicant Address

The Applicant Address page begins with an area to enter a Current Address. The address can be Domestic (USA) or International. Previous Addresses can be entered.


When adding a Previous Residence, you will click the '+ Previous Residence' button which will open a container with the appropriate data entry fields. The new section is framed with a border that has a faded-red 'X' in the upper right corner. Clicking on this 'X' will remove the bordered section. Bordered sections can be removed in any order.

If the Product package has been configured to have a minimum number of years of address history or a minimum number of previous addresses, an instruction will appear just below the Product Notes. If you do not enter the minimum number of previous addresses, you will receive an alert. You may then add a previous address or you may check the box to indicate that you are unable to provide more addresses. Entering the minimum number of previous addresses or checking the box will allow you to move on to the Next page.

Applicant Address

SSD Client - Employment Check

Order Entry *step 3 of 7*

 PRODUCT NOTES

CLIENT'S PRODUCT NOTES FOR EMPLOYMENT CHECK

Please provide 3 years of address history or 1 previous addresses.

☐ Please check box if you are unable to provide more addresses.

## Residence Verification

The Residence Verification page is used when an applicant's current and/or previous addresses will be verified. If address information was entered on the Applicant Address page, it is included automatically in the Residence Verification page. In addition, each residence address includes an option to indicate the type of residence as Rent, Own or Family/Friend.

Selecting Rent will display address and landlord data entry fields, as does Family/Friend.

COMING SOON

File Number

Search

Go

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Residence Verification

SSD Client - Employment Check

Order Entry step 4 of 7

SEARCH NOTES

RESIDENCE VERIFICATION SEARCH INSTRUCTIONS

PRODUCT NOTES

CLIENT'S PRODUCT NOTES FOR EMPLOYMENT CHECK

Rent

Own

Family Or Friend

Yes

No

Verify This Residence?

Current Address

1234 STR

NEW YORK, NY 10101

Move-In Date

MM/DD/YYYY

Move-Out Date

MM/DD/YYYY

Comments

Landlord

NAME OF LANDLORD

PHONE

LANDLORD'S EMAIL

FAX

Monthly Rent

\$

Names of Residents

JACKSON, JILL

Add Residence

Save Draft

Cancel

Skip

Next

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If 'Own' is selected as the type of residence for an address entry, the Residence Verification page will not include landlord data entry fields for that residence.

COMING SOON

File Number

Search

Go

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Residence Verification

SSD Client - Employment Check

Order Entry step 4 of 7

SEARCH NOTES

RESIDENCE VERIFICATION SEARCH INSTRUCTIONS

PRODUCT NOTES

CLIENT'S PRODUCT NOTES FOR EMPLOYMENT CHECK

Rent

Own

Family Or Friend

Yes

No

Verify This Residence?

Current Address

1234 STR

NEW YORK, NY 10101

Move-In Date

MM/DD/YYYY

Move-Out Date

MM/DD/YYYY

Comments

Names of Residents

JACKSON, JILL

Add Residence

Save Draft

Cancel

Skip

Next

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Each residence address has an option for verification: Verify This Residence?

Clicking on the '+ Add Residence' button will open up a new bordered section to allow the entry of another residence address. The address can be Domestic (USA) or International. Previous Addresses can be entered.

PRODUCT NOTES  
CLIENT'S PRODUCT NOTES FOR RESIDENCE CHECK

☐ Rent ☒ Own ☐ Family Or Friend

☒ Yes ☐ No Verify This Residence?

Current Address

1234 STR

NEW YORK, NY 10101

\* Names of Residents

JONES, ROBERT J.

Move-In Date

06/06/2002

Move-Out Date

MM/DD/YYYY

Comments

☒ Rent ☐ Own ☐ Family Or Friend

☒ Yes ☐ No Verify This Residence?

Previous Residence

567 AVE

LAS VEGAS, NV 89119

Landlord [Contacts](#)

XYZ PROPERTY MANAGEMENT702-555-1212

XYZPROP@SOMEBUSINESS.COM702-555-1111

Move-In Date

01/01/2001

Move-Out Date

05/31/2002

Monthly Rent

2000

Comments

\* Names of Residents

JONES, BOBBY J.

+ Add Residence

For entries that include Landlord information, a clickable link is available labeled 'Contacts' (formerly known as 'Rolodex'). The Contacts feature allows you to view, add, edit and select a contact from your list of Contacts. Selecting a Contact will copy the contact's information into the Residence Verification page in the appropriate section. Also, if the Landlord information has already been entered, clicking on the Contacts link will allow you to add a contact to your lookup list.

### Employment Verification

The Employment Verification page is used when an applicant's current and/or previous employment is to be verified.

COMING SOON

File Number

Search

Go

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Employment Verification - Applicant - Applicant

SSD Client - All in One Background Check

Order Entry *step 4 of 30*

PRODUCT NOTES

ALL IN ONE INCLUDES MANY IDENTITY, CREDIT, INVESTIGATIVE, VERIFICATION AND OTHER BACKGROUND CHECKS.

Currently Employed?

☒ Yes
 ☐ No

Current Employer

\* May We Contact This Employer?

☒ Yes
 ☐ No

\* Employer

CONTACTS

LOUISIANA-PACIFIC CORPORATION

\* Contact Phone

8005555555

\* Name While at This Employer

JONES

BOBBY

J

Contact Email

Contact Fax

Start Date

09092005

\* Job Title or Position

LINEMAN

\* Supervisor

JACK

\* Salary

10000

\* Per

Year

Type or Status

Full-time

Employer Address

805 SW BROADWAY

97205

PORTLAND

OR

Reason for Leaving

Additional Information

+ Add Current Employer

+ Add Previous Employer

Save Draft

Cancel

Skip

Next

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Additional employers can be added and are divided into Current Employers and Previous Employers. Clicking the Add Current Employer button presents a bordered section with relevant employer information fields. Clicking the Add Previous Employer button presents a bordered section for entering information about a previous employer. Multiple sections can be added. And any of the added sections can be removed independently of the others.

Clicking on the Contacts Lookup link (next to the Employer label) will open the Contacts Lookup for all Employer entries you have. If the entry can be edited, a pencil icon will appear at the right end of the entry's row. Employer contacts can be added or edited and then selected for use in the order.

Selecting a Contact will copy the contact's information into the Employment Verification page in the appropriate section. Also, if the Employer information has already been entered onto the Employer Verification page, clicking on the Contacts link for that employer will allow you to add it as a contact in your lookup list.

### County, State, Federal and International Searches

Most of the jurisdiction-based and investigative record searches have received only minor changes to the look and feel of each page. The primary change is the replacement of the 'Remove' button with the ubiquitous red 'X' button that when clicked will remove the entry from the list.

Page 18

County Criminal Records Search

SSD Client - Criminal Background Check  
Order Entry *step 3 of 6*

PRODUCT NOTES  
INCLUDES COUNTY, STATE AND NATIONAL CRIMINAL BACKGROUND CHECKS BASED ON REPORTED ADDRESSES.

Selected Jurisdictions

State	County	Name	Date of Birth	
KY	MADISON	WHIPLASH, SNYDLEY	01-01-1971	

+ County

All Jurisdictions

Save Draft

Cancel

Next

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State Criminal Records Search

SSD Client - Criminal Background Check  
Order Entry *step 4 of 6*

PRODUCT NOTES  
INCLUDES COUNTY, STATE AND NATIONAL CRIMINAL BACKGROUND CHECKS BASED ON REPORTED ADDRESSES.

Selected Jurisdictions

State	Name	Date of Birth	
KENTUCKY	WHIPLASH, SNYDLEY	01-01-1971	

+ State

All Jurisdictions

Save Draft

Cancel

Next

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Federal Criminal Records Search

SSD Client - Criminal Background Check  
Order Entry *step 5 of 6*

PRODUCT NOTES  
INCLUDES COUNTY, STATE AND NATIONAL CRIMINAL BACKGROUND CHECKS BASED ON REPORTED ADDRESSES.

Selected Jurisdictions

Federal District	Name	Date of Birth	
KENTUCKY EASTERN	WHIPLASH, SNYDLEY	01-01-1971	
KENTUCKY WESTERN	WHIPLASH, SNYDLEY	01-01-1971	
TENNESSEE MIDDLE	WHIPLASH, SNYDLEY	01-01-1971	

+ Add a District

All Jurisdictions

Save Draft

Cancel

Next

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The various jurisdiction lookup tools have been redesigned to conserve space and make it easier to select one or more jurisdictions. County, State, Federal District and Country lookup popups have been restyled:

File Number

Search

Go

### County Selection Tool

County LookUp

All Counties

Select a State to see its Counties

Alabama	Kentucky	Ohio
Alaska	Louisiana	Oklahoma
American Samoa	Maine	Oregon
Arizona	Marshall Islands	Palau
Arkansas	Maryland	Pennsylvania
California	Massachusetts	Puerto Rico
Colorado	Michigan	Rhode Island
Connecticut	Minnesota	South Carolina
Delaware	Mississippi	South Dakota
District of Columbia	Missouri	Tennessee
Federated States of Micronesia	Montana	Texas
Florida	Nebraska	Utah
Georgia	Nevada	Vermont
Guam	New Hampshire	Virgin Islands
Hawaii	New Jersey	Virginia
Idaho	New Mexico	Washington
Illinois	New York	West Virginia
Indiana	North Carolina	Wisconsin
Iowa	North Dakota	Wyoming
Kansas	Northern Mariana Islands	

Cancel

Select

File Number

Search

Go

### State Selection Tool

Select one or more States to include in this Search

<input type="checkbox"/> Alabama	<input checked="" type="checkbox"/> Kentucky	<input type="checkbox"/> Ohio
<input type="checkbox"/> Alaska	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Oklahoma
<input type="checkbox"/> American Samoa	<input type="checkbox"/> Maine	<input type="checkbox"/> Oregon
<input type="checkbox"/> Arizona	<input type="checkbox"/> Marshall Islands	<input type="checkbox"/> Palau
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Maryland	<input type="checkbox"/> Pennsylvania
<input type="checkbox"/> California	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Puerto Rico
<input type="checkbox"/> Colorado	<input type="checkbox"/> Michigan	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Minnesota	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Delaware	<input type="checkbox"/> Mississippi	<input type="checkbox"/> South Dakota
<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Missouri	<input type="checkbox"/> Tennessee
<input type="checkbox"/> Federated States of Micronesia	<input type="checkbox"/> Montana	<input type="checkbox"/> Texas
<input type="checkbox"/> Florida	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Utah
<input type="checkbox"/> Georgia	<input type="checkbox"/> Nevada	<input type="checkbox"/> Vermont
<input type="checkbox"/> Guam	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> Virgin Islands
<input type="checkbox"/> Hawaii	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Virginia
<input type="checkbox"/> Idaho	<input type="checkbox"/> New Mexico	<input type="checkbox"/> Washington
<input type="checkbox"/> Illinois	<input type="checkbox"/> New York	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Indiana	<input type="checkbox"/> North Carolina	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Iowa	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Kansas	<input type="checkbox"/> Northern Mariana Islands	

Cancel

Select



File Number
GO

### Federal District Selection Tool

District LookUp
All Districts

[All Districts](#)

<input type="checkbox"/> Alabama Middle	<input type="checkbox"/> Kansas	<input type="checkbox"/> Ohio Northern
<input type="checkbox"/> Alabama Northern	<input checked="" type="checkbox"/> Kentucky Eastern	<input type="checkbox"/> Ohio Southern
<input type="checkbox"/> Alabama Southern	<input checked="" type="checkbox"/> Kentucky Western	<input type="checkbox"/> Oklahoma Eastern
<input type="checkbox"/> Alaska	<input type="checkbox"/> Louisiana Eastern	<input type="checkbox"/> Oklahoma Northern
<input type="checkbox"/> Arizona	<input type="checkbox"/> Louisiana Middle	<input type="checkbox"/> Oklahoma Western
<input type="checkbox"/> Arkansas Eastern	<input type="checkbox"/> Louisiana Western	<input type="checkbox"/> Oregon
<input type="checkbox"/> Arkansas Western	<input type="checkbox"/> Maine	<input type="checkbox"/> Pennsylvania Eastern
<input type="checkbox"/> California Central	<input type="checkbox"/> Maryland	<input type="checkbox"/> Pennsylvania Middle
<input type="checkbox"/> California Eastern	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Pennsylvania Western
<input type="checkbox"/> California Northern	<input type="checkbox"/> Michigan Eastern	<input type="checkbox"/> Puerto Rico
<input type="checkbox"/> California Southern	<input type="checkbox"/> Michigan Western	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Colorado	<input type="checkbox"/> Minnesota	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Mississippi Northern	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Delaware	<input type="checkbox"/> Mississippi Southern	<input type="checkbox"/> Tennessee Eastern
<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Missouri Eastern	<input checked="" type="checkbox"/> Tennessee Middle
<input type="checkbox"/> Florida Middle	<input type="checkbox"/> Missouri Western	<input type="checkbox"/> Tennessee Western
<input type="checkbox"/> Florida Northern	<input type="checkbox"/> Montana	<input type="checkbox"/> Texas Eastern
<input type="checkbox"/> Florida Southern	<input type="checkbox"/> Nationwide	<input type="checkbox"/> Texas Northern
<input type="checkbox"/> Georgia Middle	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Texas Southern
<input type="checkbox"/> Georgia Northern	<input type="checkbox"/> Nevada	<input type="checkbox"/> Texas Western
<input type="checkbox"/> Georgia Southern	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> Utah
<input type="checkbox"/> Guam	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Vermont
<input type="checkbox"/> Hawaii	<input type="checkbox"/> New Mexico	<input type="checkbox"/> Virgin Islands
<input type="checkbox"/> Hawaii	<input type="checkbox"/> New York Eastern	<input type="checkbox"/> Virginia Eastern
<input type="checkbox"/> Idaho	<input type="checkbox"/> New York Northern	<input type="checkbox"/> Virginia Western
<input type="checkbox"/> Illinois Central	<input type="checkbox"/> New York Southern	<input type="checkbox"/> Washington Eastern
<input type="checkbox"/> Illinois Northern	<input type="checkbox"/> New York Western	<input type="checkbox"/> Washington Western
<input type="checkbox"/> Illinois Southern	<input type="checkbox"/> North Carolina Eastern	<input type="checkbox"/> West Virginia Northern
<input type="checkbox"/> Indiana Northern	<input type="checkbox"/> North Carolina Middle	<input type="checkbox"/> West Virginia Southern
<input type="checkbox"/> Indiana Southern	<input type="checkbox"/> North Carolina Western	<input type="checkbox"/> Wisconsin Eastern
<input type="checkbox"/> Iowa Northern	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Wisconsin Western
<input type="checkbox"/> Iowa Southern	<input type="checkbox"/> Northern Mariana Islands	<input type="checkbox"/> Wyoming

Cancel
Select

File Number
GO

### Country Selection Tool

<input type="checkbox"/> Afghanistan	<input type="checkbox"/> Germany	<input type="checkbox"/> Northern Ireland
<input type="checkbox"/> Akrotiri	<input type="checkbox"/> Ghana	<input type="checkbox"/> Northern Mariana Islands
<input type="checkbox"/> Albania	<input type="checkbox"/> Gibraltar	<input type="checkbox"/> Norway
<input type="checkbox"/> Algeria	<input type="checkbox"/> Glorioso Islands	<input type="checkbox"/> Oman
<input type="checkbox"/> American Samoa	<input type="checkbox"/> Greece	<input type="checkbox"/> Pacific Ocean
<input type="checkbox"/> Andorra	<input type="checkbox"/> Greenland	<input type="checkbox"/> Pakistan
<input type="checkbox"/> Angola	<input type="checkbox"/> Grenada	<input type="checkbox"/> Palau
<input type="checkbox"/> Anguilla	<input type="checkbox"/> Guam	<input type="checkbox"/> Palestine
<input type="checkbox"/> Antarctica	<input type="checkbox"/> Guatemala	<input type="checkbox"/> Palmyra Atoll
<input type="checkbox"/> Antigua and Barbuda	<input type="checkbox"/> Guernsey	<input type="checkbox"/> Panama
<input type="checkbox"/> Arctic Ocean	<input type="checkbox"/> Guinea	<input type="checkbox"/> Papua New Guinea
<input type="checkbox"/> Argentina	<input type="checkbox"/> Guinea-Bissau	<input type="checkbox"/> Paracel Islands
<input type="checkbox"/> Armenia	<input type="checkbox"/> Guyana	<input type="checkbox"/> Paraguay
<input type="checkbox"/> Aruba	<input type="checkbox"/> Haiti	<input type="checkbox"/> Denmark

## 6. BATCH IMPORT

### Select Client for Batch Order Import

The new Select Client for Batch Order Import page has been redesigned so filtering and selecting are easier. When you click on the Batch Order sidebar menu link, as a CRA user you will see the Select Client for Batch Order Import page with your cursor in the 'Find Client' filter box. As you enter letters, the list of clients in the displayed table is altered to match.

To select a Client for the batch order, you may click anywhere in that Client's row of information. You are no longer required to click the client's name link.

COMING SOON

File Number Search Go

Scott

HOME ORDER WORKSPACE ADMIN UTILITIES

ORDER

New Order

Batch Order

Draft Orders

Applicant Pending

Applicant Ready

XML Ready

Select Client For Batch Order Import

ssd

Company Name	Code	Contact	Phone	Fax
SSD Client	SSDUX	Scott Dean	-	-
SSD's Client	SSDCL	Scott Dean	-	-

Items per page: 15 Showing 1 to 2 of 2 clients. (filtered from 92 total entries)

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After selecting a Client for the Batch Import, the Batch Order Import page will display with the list of supported searches hidden in a collapsed panel. To see all of the Supported Searches that can be imported, click on the 'Supported Searches' label or down arrow to open the panel.

COMING SOON

File Number Search Go

Scott

HOME ORDER WORKSPACE ADMIN UTILITIES

ORDER

New Order

Batch Order

Draft Orders

Applicant Pending

Applicant Ready

XML Ready

Batch Order Import

SSD Client

Supported Searches

Browse Please select file...

Select the CSV file to use for batch order import.

Import

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COMING SOON

File Number  Search

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

ORDER

New Order

Batch Order

Draft Orders

Applicant Pending

Applicant Ready

XML Ready

Batch Order Import

SSD Client

Supported Searches

- Assumed Name Records
- Bankruptcy Filings Search
- Commercial Drivers License Information System Records (CDLIS)
- County Civil Records
- County Criminal Records
- Credentials Custom Searches
- Credit Report
- Credit Custom Searches
- Education Verification
- Employment Verification
- Federal Civil Records
- Federal Criminal Records
- Global Security Watch List
- Identity Development Custom Searches
- InstaCriminal National
- InstaCriminal National Alias
- InstaCriminal Single State
- InstaEviction National Lookup
- InstaEviction Single State
- Instant Driving Records
- International Criminal Records
- Investigative Custom Searches
- Lien and Judgment Filings Search
- Healthcare Sanctions Search
- Person Search
- Personal Reference Verification
- Professional Reference Verification
- Reference Verification
- Report Summarization Custom Searches
- Sex Offender Records
- Social Security Search
- State Criminal Records
- Substance Abuse Detection
- Substance Abuse Screening Custom Searches
- Tenant Scorecard
- Verification Custom Searches
- Workers Compensation Report

Searches marked with an asterisk () must be configured as either Required or Default in product set-up before importing. If the client's "Automatically PreSearch Existing Reports" preference is set, potential duplicates will be added to the XML Ready queue.

Browse

Please select file...

Import

Select the CSV file to use for batch order import.

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To import, click on the Browse button, select a CSV format file. Then click the Import button. A message will appear near the top of the page to advise you of the results of your import.

Note that the Supported Searches panel can be closed or open for importing.

## 7. DRAFT ORDERS

The Draft Order page displays a list of orders that have not been entered completely.

COMING SOON

File Number  Search

Scott

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

ORDER

New Order

Batch Order

Draft Orders

Applicant Pending

Applicant Ready

XML Ready

Draft Orders

Delete

Filter

	Save Date	Client	Product	Requester	Applicant
<input type="checkbox"/>	2014-06-24	AAA Client	swd - test1	Schnew Schluser	MERCKLE, HARTENCE
<input type="checkbox"/>	2014-06-13	z13	zeniga	less	LAST, FIRST
<input type="checkbox"/>	2014-06-12	AAA Client	swd - test1	Gee Willikers	CADED, ED JU
<input type="checkbox"/>	2014-06-12	z13	zeniga	less	LAST, FIRST ASDFASDF
<input type="checkbox"/>	2014-06-12	z13	zeniga	less	RED, WHITE GREEN
<input type="checkbox"/>	2014-06-03	AAA Client	swd - test1	Jeff Nerd	SMITH, JIM
<input type="checkbox"/>	2014-06-02	AAA Client	swd - test1	Schnew Schluser	CRIMINAL, CRANKY
<input type="checkbox"/>	2014-06-02	AAA Client	swd - test1	Schnew Schluser	CRIMINAL, CRANKY
<input type="checkbox"/>	2014-06-02	AAA Client	swd - test1	Schnew Schluser	CRIMINAL, CRANKY
<input type="checkbox"/>	2014-06-02	AAA Client	swd - test1	Schnew Schluser	RENTNER, TRANSIT
<input type="checkbox"/>	2014-05-30	AAA Client	swd - test1	Schnew Schluser	CRIMINAL, CREEPY
<input type="checkbox"/>	2014-05-30	AAA Client	swd - test1	Schnew Schluser	ESSENCE, PATCHOULI
<input type="checkbox"/>	2014-05-30	AAA Client	swd - test1	Schnew Schluser	WASH, HOG
<input type="checkbox"/>	2014-05-29	AAA Client	swd - test1	Schnew Schluser	WASH, HOG

Items per page: 15

Showing 1 to 14 of 14 clients.

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## 8. APPLICANT PENDING & APPLICANT READY

The Applicant Pending page displays a list of orders that have not been entered completely and are waiting for information to be completed by an applicant who received an invitation to use a QuickApp™. A new feature is the edit email icon (green) that allows you to change the applicant's email with a single click.

COMING SOON

File Number  Search

Scott

HOMEORDERWORKSPACEADMINUTILITIES
















ORDER

New OrderBatch OrderDraft OrdersApplicant PendingApplicant ReadyXML Ready

Applicant Pending Reports

Reset Expiration Date Resend Notification Delete

Filter

Applicant	Detail	E-mail	Client	Requester	Ordered	Notified	Sent
AAA, BBB		 s@yahoo.net	AAA Client	Jeff Nerd	2014-12-11	2014-12-11	1
NAME, APPLICANT		 danicad@tazworks.com	Your Client Name	Username	2014-11-10	2014-11-10	2
NAME, APPLICANT		 danicad@tazworks.com	Your Client Name	The Other User	2014-11-10	2014-11-10	2
WIL, CAM		 camerow@tazworks.com	Cameron's Creations	Cameron	2014-11-10	2014-11-10	1
TEST, TEST		 travis@parkin-sec.com	AAA Client	Jeff Nerd	2014-11-06	2014-11-06	1
COREN, BENARIEL		 benarielcoren@gmail.com	SSD Client	Anika Kai	2014-10-24	2014-10-24	1
COREN, BENARIEL		 benarielcoren@gmail.com	SSD Client	Anika Kai	2014-10-23	2014-10-23	1
MESS, HANK		 cfacts@gmail.com	AAA Client	Joe Schmoe	2014-10-10	2014-10-10	1
INADIQUIT, WOEFULLY		 ux@tazworks.com	AAA Client	Jeff Nerd	2014-10-10	2014-10-10	2
GLACOMMON, BAERBEL		 ux@tazworks.com	AAA Client	Jeff Nerd	2014-10-10	2014-10-10	1
FOR JOB, APPLYING		 danicad@tazworks.com	Your Client Name	The Other User	2014-10-10	2014-10-10	2
VAGARA, BEN		 benvagara@gmail.com	SSD Client	Anika Kai	2014-09-04	2014-09-04	1
BOWMAN, TIM		 Tim@tenantreports.com	ABC Tenant, Inc.	Joe Tenant	2014-09-04	2014-09-04	1
SOME, BODY		 billb@tazworks.com	AAA Client	Jeff Nerd	2014-08-30	2014-08-30	1
VAGARA, BEN		 benvagara@gmail.com	SSD Client	Anika Kai	2014-08-26	2014-08-26	2

Items per page: 15 Showing 1 to 15 of 21 applicants

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The Applicant Ready page displays a list of orders that are incomplete, but have been updated with information from the applicant via QuickApp™.

COMING SOON

File Number  Search

Scott

HOMEORDERWORKSPACEADMINUTILITIES












ORDER

New OrderBatch OrderDraft OrdersApplicant PendingApplicant ReadyXML Ready

Applicant Ready Reports

Delete

Filter

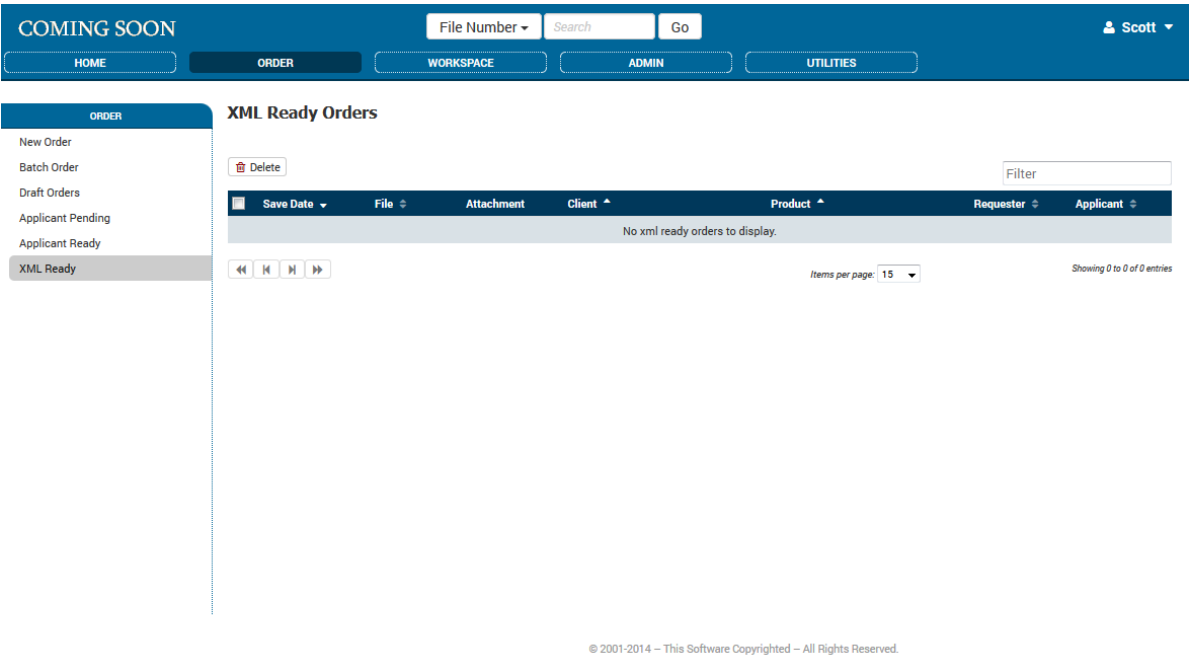
Applicant	Detail	E-mail	Attachment	Submitted	Client	Requester	Sent
COREN, BEN		benarielcoren@		2014-12-18	SSD Client	Anika Kai	2014-12-18
JONES, BRAD		bjones@safescn		2014-11-26	AAA Client	Gee Willikers	2014-11-26
TEST, TEST		emilyb@tazwork		2014-11-10	Emilys Company	Emily	2014-11-10
TEST, TEST		emilyb@tazwork		2014-11-10	Emilys Company	Emily	2014-11-10
KLEEN, JOEY		Patti@incheck.n		2014-10-21	AAA Client	Joe Schmoe	2014-10-20
T, D		Bartont@tazwor		2014-10-17	AAA Client	Joe Schmoe	2014-10-17
PEEK, SNEAK23		patti@incheck.n		2014-10-13	Amy's Company	Amy Smith	2014-10-13
STRAPPED, ARM		tylerb@tazworks		2014-10-13	z13	less	2014-10-13
TEST, CASE		bartont@tazwor		2014-10-04	AAA Client	Gee Willikers	2014-10-04
VAGARA, BEN		benvagara@gme		Application Declin	SSD Client	Anika Kai	2014-08-25
VAGARA, BEN		benvagara@gme		Application Declin	SSD Client	Anika Kai	2014-08-21

Items per page: 15 Showing 1 to 11 of 11 applicants

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## 9. XML READY

The XML Ready page lists potential new orders ready to be edited and completed that were submitted via the XML Interchange.



## 10. WORKSPACE – PENDING REPORTS

In addition to redesigning the layout of the Pending Reports page, a new table column displays the report's Product Order Entry Type that is set in the Product Configuration.

Icons representing Report Decisions, Flags and Attachments may appear in the Flag column.

Ordered	Type	Flag
2014-12-12	Employment	
2014-10-31	Employment	
2014-11-06	Employment	
2014-11-12	Employment	 
2014-11-25	Employment	
2014-10-24	Employment	
2014-11-06	Employment	
2014-11-26	Employment	 
2014-11-27	Employment	
2014-12-04	Employment	 

The layout is consistent with the look and feel of other redesigned tables.

COMING SOON

File Number  Search

HOME

ORDER

WORKSPACE

ADMIN

UTILITIES

Scott

WORKSPACE

SEARCHES

Search Summary

Client Summary

Vendor Summary

Pending Searches

Time Service (Searches)

Drug Testing Queue

REPORTS

Pending Reports

Completed Reports

Time Service (Reports)

Disclosures Queue

FIND

Last 10 Reports

Last 25 Reports

Last 50 Reports

Last 200 Reports

Advanced Search

Pending Reports

Results View Report Print Assign

Filter: -- Please Select --

Name	SSN	File	Client	Assigned To	Status	Ordered	Type	Flag
WESSON, SMITH R.	-	16299	SSD Client	Scott Dean	new	2014-12-12	Employment	
BROOKS, EMILY	XXX-XX-0000	16245	ABC Employer, Inc.	Ramadasu. Bhima.	pending	2014-10-31	Employment	
LA-A, JUNIOR	333-22-1111	16244	Your Client Name	Ramadasu. Bhima.	pending review	2014-11-06	Employment	
HAZARD, DUKE S.	XXX-XX-4444	16261	SSD Client	Ramadasu. Bhima.	new	2014-11-12	Employment	
SMITH, BOB	XXX-XX-9292	16264	SSD Client	Scott Dean	pending	2014-11-25	Employment	
MILLER, MILES	XXX-XX-2222	16242	SSD Client	Ramadasu. Bhima.	pending	2014-10-24	Employment	
EMAIL, EMILY E.	XXX-XX-3838	16249	SSD Client	Scott Dean	pending	2014-11-06	Employment	
SAMPLES, JUNIOR	XXX-XX-8888	16268	SSD Client	Steven Naimoli	pending review	2014-11-26	Employment	
MESS, HANK	XXX-XX-1111	16271	SSD Client	Scott Dean	new	2014-11-27	Employment	
WONKA, WILLIE	XXX-XX-7777	16277	SSD Client	Scott Dean	pending	2014-12-04	Employment	
ASDF, ASDF	235-23-5325	16248	Your Client Name	Ramadasu. Bhima.	pending	2014-11-06	Employment	
WESSON, SMITH N.	-	16298	SSD Client	Scott Dean	new	2014-12-12	Employment	
SMITH, JOHN	XXX-XX-8787	16288	SSD Client	Scott Dean	pending	2014-12-09	Employment	
JONES, BRONCO	XXX-XX-8888	16289	SSD Client	Scott Dean	pending	2014-12-09	Employment	
KOOL, LL	XXX-XX-5555	16280	SSD Client	Scott Dean	pending	2014-12-05	Employment	

Items per page: 15

Showing 1 to 15 of 131 reports.

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## 11. WORKSPACE – REPORT RESULTS

The Report Results page has been redesigned to improve your ability to spot important information about the Order without having to skim through all of the details.

At the top of the Report Results page you will find:

- 1) File Number and Applicant Name
- 2) Client Name
- 3) Reference information from reference field, if any
- 4) Requester Name
- 5) Available Action Buttons, including the 'Add New Search' button which was previously labeled as 'Add to Order'.
- 6) Status Tile which is color coded (green Complete, gray Pending, etc.)
- 7) Report Decision (if Report Decision Tool is used)
- 8) Collapsible sections for Order Details, Applicant Information, Co-applicant and Spouse. Page view can be set to 'Open' or 'Closed' for each user. Default is Open. Sections can be opened or closed with a click on the section heading bar.

Report Results - # 16308 - WILSON, FRANCIS O.

REFERENCE INFORMATION

View Print ...

New Search

5

SSD Client

Anika Kai

New Order

Order Details

6

Pending

Pending (per client specifications)

7

Applicant Information

8



The row of Action Buttons are also located across the bottom of the page, including the View, Print, a dropdown button for less used actions like Restrict and Cancel. All order level buttons appear together. One important change is that the old 'Add to Order' button has been relabeled as the 'Add New Search' button (+ New Search) and appears in three places on the page to make it easier for you to add a new search to the Order by selecting a search the Product package.

New panels contain the Order Details and Applicant Information sections. Spouse and Co-applicant sections appear when applicable. Each of the upper sections of information are now in collapsible panels which can be set for a user to be open or closed when the page loads. The default is open. This setting is found on the MyProfile page under the Preferences tab for the user. In addition, if you have opened or closed individual panels on a report, the report will appear the same if you leave and later return to it.

**Report Results - # 16302 - WILSON, MARY R.**
SSD Client  
Anika Kai

View
Print
...

+ New Search
Co-Applicants

New Order

**Order Details**

Status:

Pending

Decision:

Pending (per client specifications)

Order Date: 12-18-2014 9:09 AM MST

Requester: Anika Kai

Report Date: 12-18-2014 4:22 PM MST

Email: xanika@live.com

File Number: 16302 / REFERENCE INFORMATION

Phone: -

Report To: SSD Client / SSDUX  
123  
Elgin, IL 60123

Alt.Phone: -

Assigned To: Dean, Scott

Fax: -

Product: Tenant Package

Charges: \$15.00

**Applicant Information**

Name: WILSON, MARY R.

SSN/DOB: 393-93-9393 / 02-02-1988

Email: MARY@WILSON.CC

Phone: 8889991111

Gender: F

Drivers License: AL - W123456

Edit Applicant Information

**Search Results**

+ New Search

The Search Results section has been redesigned to allow for more information to be displayed in a smaller viewport (such as on a tablet device). Previously, details related to a search would appear in one or two columns with links in either one or the other column. The new look has combined these two columns into a single, clickable column of data.

The inline action buttons have been replaced with colored icons for Add (green +), Remove (red x) and Sort (re-sequence).

Search Results

New Search

Search	Status	Assigned	
Credit Report			
Experian (393-93-9393)	Processing ...	Unassigned	✖
County Criminal Records Search			+
NY-NEW YORK (WILSON, MARY)	New Dispatched	Unassigned	✖
Residence Verification			⌵ +
WILSON, MARY	Complete	Unassigned	✖
Employment Verification			⌵ +
3M	Pending	Unassigned	✖

Attachments

+

applicantAddressMinimum.PNG (17 KB)

✖

Authorization Form (167 KB)

⌵

Disclosures and Forms

-Select Disclosure or Form-

⌵

View

Email

Client Notes

Viewable by Client

2

Order Entry Notes

Viewable by Client

Notes on User

Product Notes

Report Notes

1

View

Print

...

New Search

Co-Applicants

New Order

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The Attachments section uses a dropdown “Add” (+) button to allow you to select the type of attachment document that will be uploaded, either Authorization Form or other Attachment. All attachments are listed.

Disclosures and Forms are selected from the dropdown and can then be Viewed or Emailed by clicking the corresponding button.

Notes sections are collapsible and are opened or closed by clicking on the header bar or label for the section you wish to open or close.

Required sections, such as Client Notes and Report Notes, are always displayed and have a badge to the right side that indicates the number of note entries they contain. Zero would indicate no entries in that section.

Optional notes sections (such as Order Entry Notes or Product Notes) only appear if they have something in them. Client Notes and Order Entry Notes indicate if they can be viewed by the client. Optional do currently have number badges to indicate content.

When you wish to add or edit notes, where allowed, an edit box will appear.

Below the notes sections you will find the same Available Action Buttons that are at the top.

## 12. ADMIN – CLIENT

### Client Configuration

The Client Configuration page for adding or editing client information has been redesigned, reorganized and refactored for a number of new features.

When you add a new Client you will be presented with a single page for entering the initial information needed to set up a client:

**COMING SOON** File Number  Search  Scott

HOME ORDER WORKSPACE **ADMIN** UTILITIES

**ADMIN**

**CLIENTS**

- Manage Clients
- Manage Predefined Fees

**PRODUCTS**

- Manage Products
- Manage Custom Searches
- Manage Drug Abuse Panels
- Manage Questions
- Manage Charge Tables
- Manage Report Layout
- Manage Required Fields
- Manage Search Remarks

**VENDORS**

- Manage Vendors
- Manage Vendor Routing
- Manage Contacts
- Manage Jurisdiction Groups
- Manage Interface Settings

**MY COMPANY**

- Manage CRA
- Advanced Configurations

**Create Client**

**Client Information**

- \* Company Name:
- Parent Company:
- \* Inquiry Name:
- ☐ Substitute End User <sup>?</sup>
- \* Client Code:
- \* Date Created:

**Contact Information**

- \* Name:
- \* Email:
- Phone Number:  Ext:
- Alt. Phone:  Ext:
- Fax:
- Fax Instruction:

Owner Name:  Owner Phone:  Ext:

Owner Email:

**Account Status** <sup>?</sup>

☒ Active ☐ Disabled

Disabled Message:  Disabled Reason:

**Physical Address**

\*Street Address

Street Address

\*Zip Code  \*City  \*State

**Billing Address** ☒ Same as physical address

\*Street Address

Street Address

\*Zip Code  \*City  \*State

Attn:

After clicking the Create button, the remainder of the options (tabs) will be available for data entry.

### Client Configuration

General Users Products Preferences Fees Billing



General information, client users and permissions, products for the client, client preferences, fees and billing information can all be added or edited by clicking on the appropriate tab.

### Client Configuration Features

A number of new features have been added to the Client Configuration area to support new functionality throughout InstaScreen™ especially in the Order Entry area.

#### Client Instructions:

Client Instructions allow you to display instructions on the Select Product and Select Searches pages in the Order Entry process. Client Instructions are added and edited by clicking on the edit (pencil) icon. After adding or editing, you may see how the instructions will appear by clicking on the preview (eye) icon.

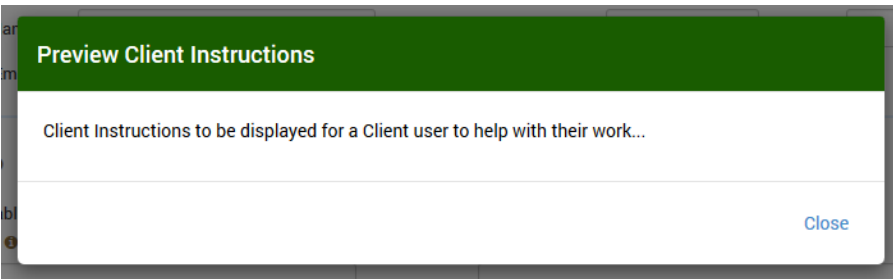
Client Instructions  

☒ Display Client Instructions

<p>Client Instructions to be displayed for a Client user to help with their work...<br></p>

Notes on Client

Client Instructions should be used for general instructions to the Client user to assist them in selecting the right product package and/or searches for an order. Client Instructions only appear on the selection pages at the beginning of order entry, while Client's Product Notes and Search Notes will display on later specific order entry pages.



On the Client Configuration page under the General tab, the Notes on Client field can be used for information that is *only* displayed on the General tab area and nowhere else.

#### Client Users:

Under the Users tab of Client Configuration, you will find a redesigned layout for the interacting with user data. Inline options for each existing user record include one-click actions for Active or Disable (clickable link), Edit User (pencil icon) or Delete User (red X icon).

Client Users 

+ User









































User	Job Title	Phone	Ext	Status	Actions
<a href="#">Johnson, Joe</a>				<a href="#">ACTIVE</a>	 
<a href="#">Kai, Anika</a>				<a href="#">ACTIVE</a>	 
<a href="#">Vagara, Ben</a>	Ops Man			<a href="#">ACTIVE</a>	 

## Client Products:

Existing products can be assigned for use by a Client by adding a Product under the Products tab of Client Configuration. Client Products list includes inline actions for edit

Client Products

+ Product

Product Name	Alternate Name	Notes	QuickApp™	Available	Actions	
<a href="#">All in One Background Check</a>		 	No	12/09/2014		
<a href="#">Criminal Background Check</a>		 	No	09/04/2014		
<a href="#">Drug Test - Non-DOT</a>		 	No	12/05/2014		
<a href="#">Employment Check</a>		 	Yes	08/13/2014		
<a href="#">Investigative Searches</a>		 	No	10/22/2014		
<a href="#">MVR Check</a>		 	Yes	09/03/2014		
<a href="#">Residence Check</a>		 	Yes	08/13/2014		
<a href="#">Tenant Package</a>		 	No	06/03/2014		
<a href="#">Tenant ScoreCard Pro</a>		 	No	11/21/2014		
<a href="#">Verifications &amp; Credentials</a>		 	No	10/30/2014		

(pencil) and delete (red X).

To add a Product for a Client, click on the +Product button. A modal appears that allows you to select one of your existing Products from a dropdown list. If you select a Product that has Default Product Notes content, the Use Default Notes button will appear that allows you to copy the Default Product Notes into the Client's Product Notes field with a single click. Client's Product Notes appear near the top of all order entry pages.

Another new feature is the Client's Custom Disclaimer field. This field will allow you to add custom disclaimer content that will be appended to the end of the overall results report for client orders using this product.

File Number  Search  Go








Add Product

Product:








Alt. Name:


Client's Product Notes: 

Use Default Notes

B I U  11 Helvetica Neue      

Client's Custom Disclaimer:

B I U  11 Helvetica Neue      

 QuickApp™

Cancel

Save

Page 31

*Note: The overall report has not been updated to use the Client's Custom Disclosure feature yet ( 31 Dec 2014)*

If you wish to use the QuickApp™ feature of InstaScreen™ with the product, you will check the box to have the QuickApp™ options appear.

☒

QuickApp™

QuickApp™:

☒ Order Entry ☐ Application

Manual Application:

-- Please Select --

\* Notification Email:

Employment

\* Confirmation Email:

Employment

\* Reminder Email:

Standard Reminder

\* Disclosure Form Set:

Employment Disclosures

CA Credit Disclosure:

Required by Law

\* Days Email Active

5

Process Instantly:

☐

Notify When Ready:

☐

Require Credit Card:

☐

Reserve Amt

\$

Alt. From Address

Alt. Client Name

### Client Preferences:

In addition to the existing data entry fields and options on the Preferences tab of the Client Configuration, you will find that the Ordering Certification text area and the User Certification text area have been revised. Both certification fields now use the new editor tool that allows for complete formatting of content as well as the use of HTML. Both use the edit (pencil) and preview (eye) icons to help you add, edit and preview content for these two fields.

#### User Certification

User Certification - Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

### Client Fees and Client Billing:

The content and layout of the Fees and Billing tabs have been reorganized slightly, but remain functionally the same.



### 13. DATA ENTRY ERRORS AND WARNINGS

---

Throughout InstaScreen™ you will see a new approach to alerting you to potential mistakes, warnings of interest, instructions and data entry errors. There are three types of alerts used: Success (green), Warning (gold) and Danger (red). Success alerts advise you of the successful completion of some action or choice. Warning alerts you to potential problems or additional choices that you may wish to review without stopping your progress. Danger alerts you to situations where you cannot continue a process due to missing data that is required or other constraints that you have set to manage the workflow.

#### Applicant

The screenshot shows a portion of the 'Applicant' form. At the top, a red error message box states: 'There is a problem with one or more form fields.' Below this is a blue box labeled '[-] PRODUCT NOTES' containing the text: 'ALL IN ONE INCLUDES MANY IDENTITY, CREDIT, INVESTIGATIVE, VERIFICATION AND OTHER BACKGROUND'. Underneath the blue box is a red error message box that says: 'This field is required and cannot be empty.' Below the error message is a row of five input fields. The first field is labeled 'Reference:' and is empty. The second field is labeled 'Referred by:' and is highlighted with a red border and a red error message. The third field is labeled 'Monthly Income:' and is empty. The fourth field is labeled '\* Monthly Rent:' and is empty. The fifth field is labeled 'Posit' and is empty. Below the input fields is a section header 'Applicant Info' followed by two input fields: '\* Last Name:' and '\* First Name:'. Both fields are empty.

The fourth method of providing you with instructions and information is the through Tertiary/Info colors, which can be set by an authorized CRA User.

### 14. THANK YOU!

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Thank you for using InstaScreen™. We hope that you find the new look and feel and the many new features beneficial.

Our product development team continues to build new features and functionality to help you build your business and support your customers. During the coming weeks and months, improvements will continue to be released.

Your comments and observations are always welcome. You may contact us at [ux@tazworks.com](mailto:ux@tazworks.com).