INSTASCREEN™ USER EXPERIENCE

1. GENERAL INSTRUCTIONS

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. 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

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.

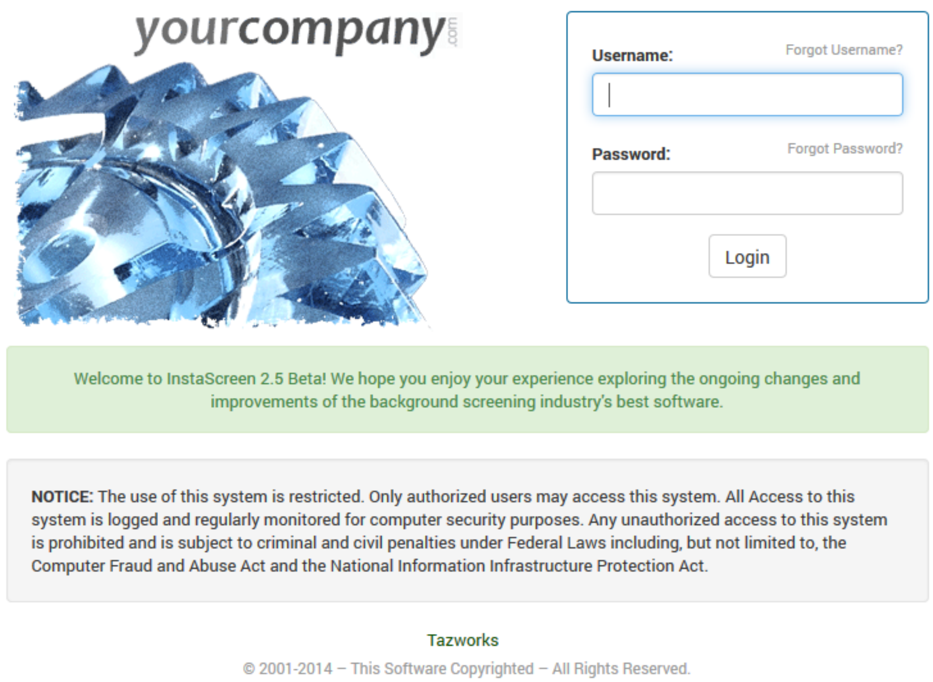
43. Redesigned display of Select Client for Order page and added capability to click anywhere on the row to select a client (not just on the client's underlined name).
44. Redesigned display of Select Product for Order (package) page and added capability to click anywhere on the row to select a product 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

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

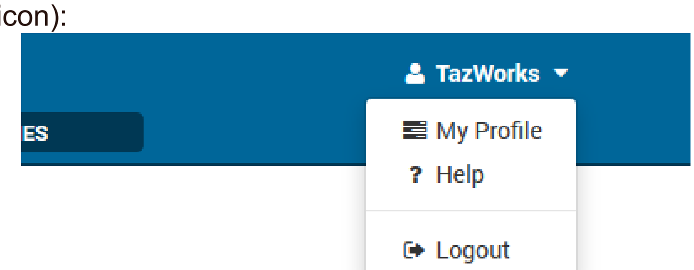


The new system messaging is shown (green in the above example). System messaging will notify users at Login of important system-wide issues, such as a scheduled maintenance.

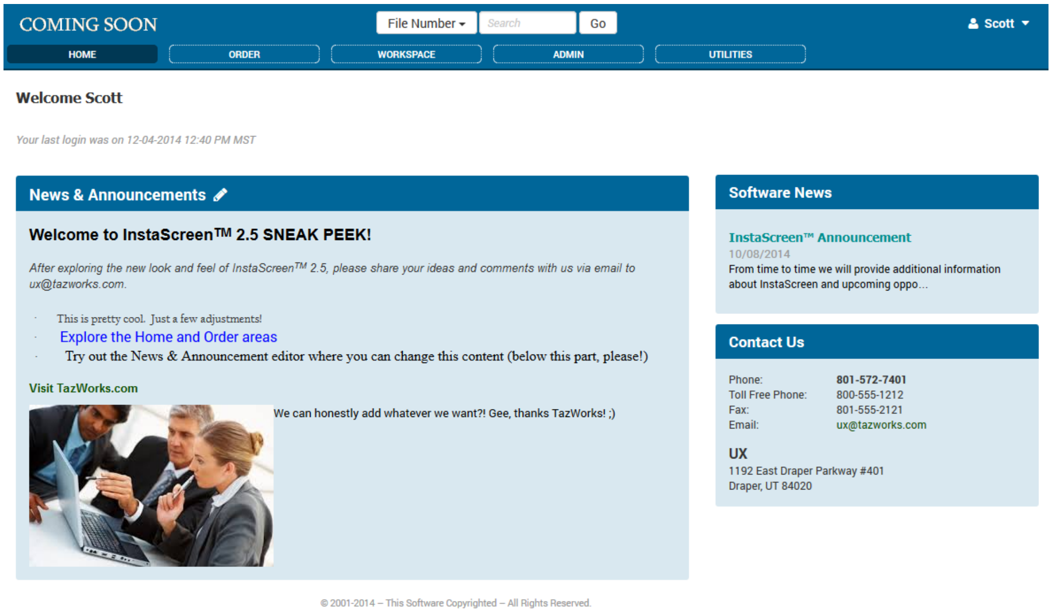
4. HOME, USERNAME, MY-PROFILE, HELP AND LOGOUT

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):

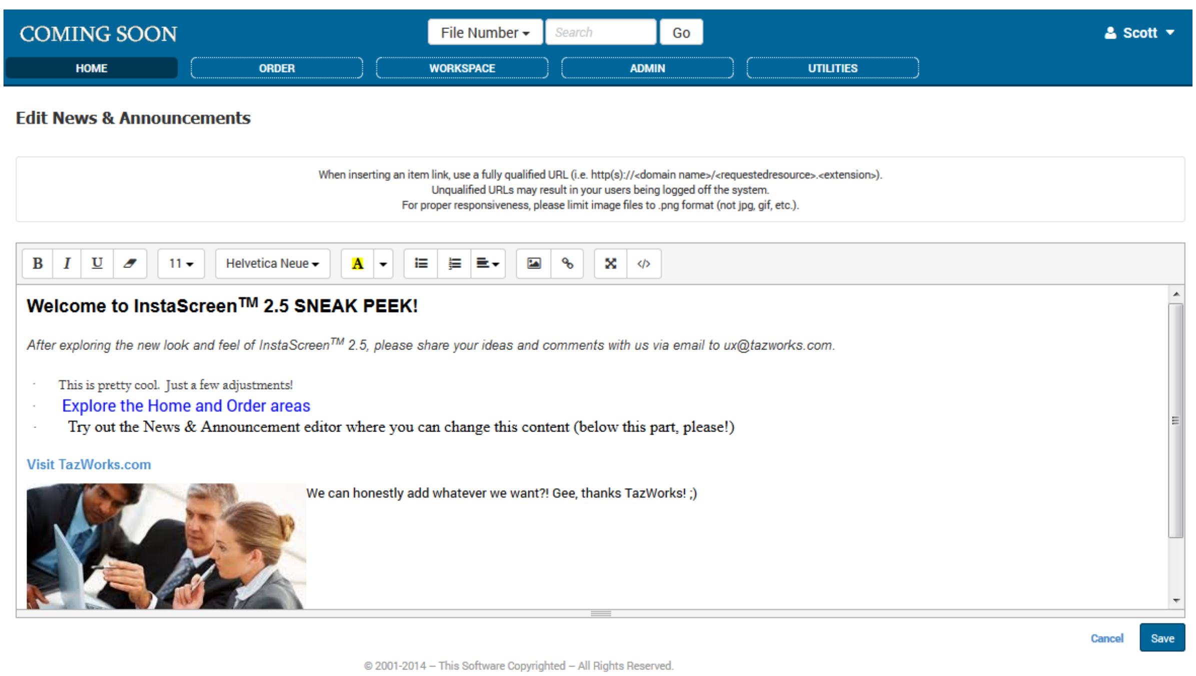


The new Home page contains the News & Announcements section and a Contact Us section. A new optional-display section may also appear: Software News. The Software News section will show release notes, software updates and other items of interest for CRAs.



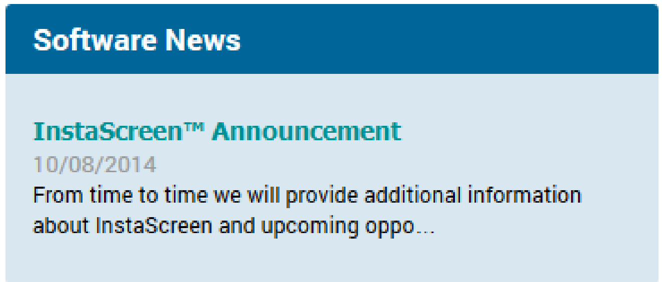
News & Announcements

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.



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.

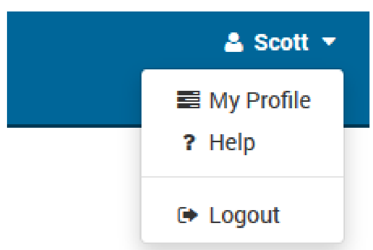


Contact Us

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

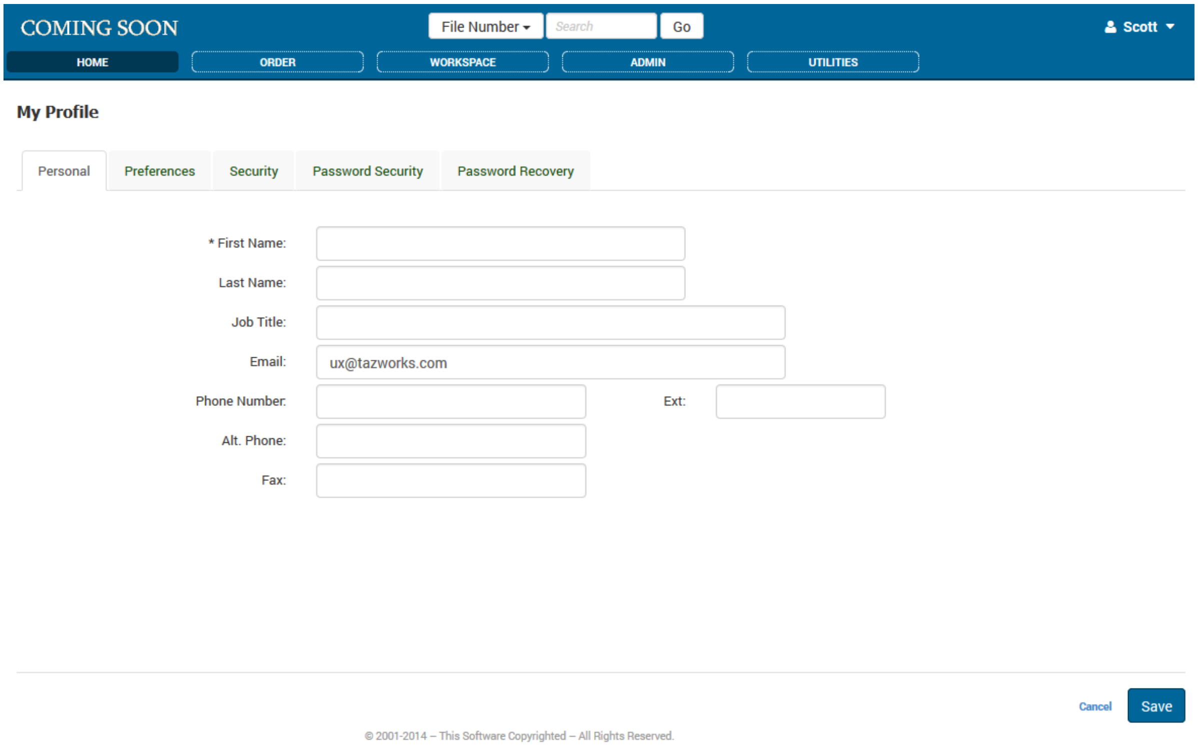
Username Dropdown

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.



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.

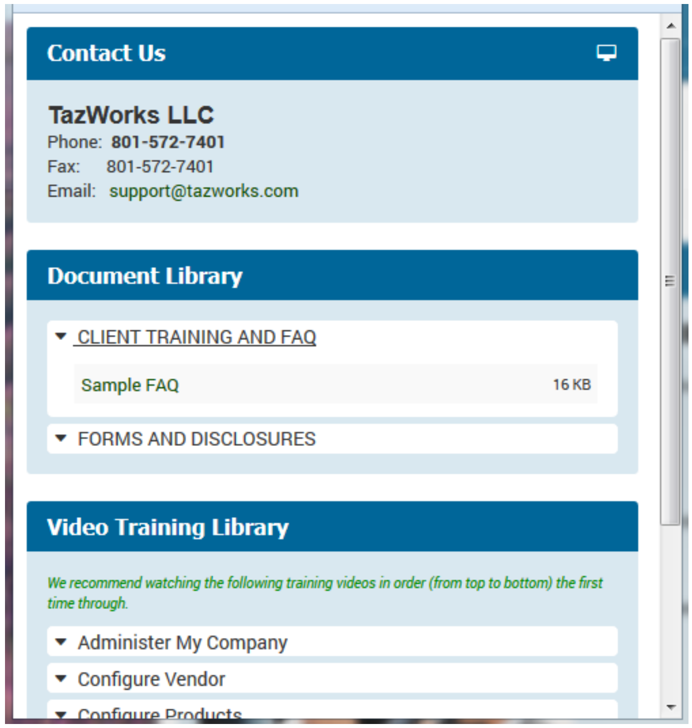


MyProfile is organized into five areas represented by separate tabs: Personal, Preferences, Security, Password Security, and Password Recovery information.

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 it 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:

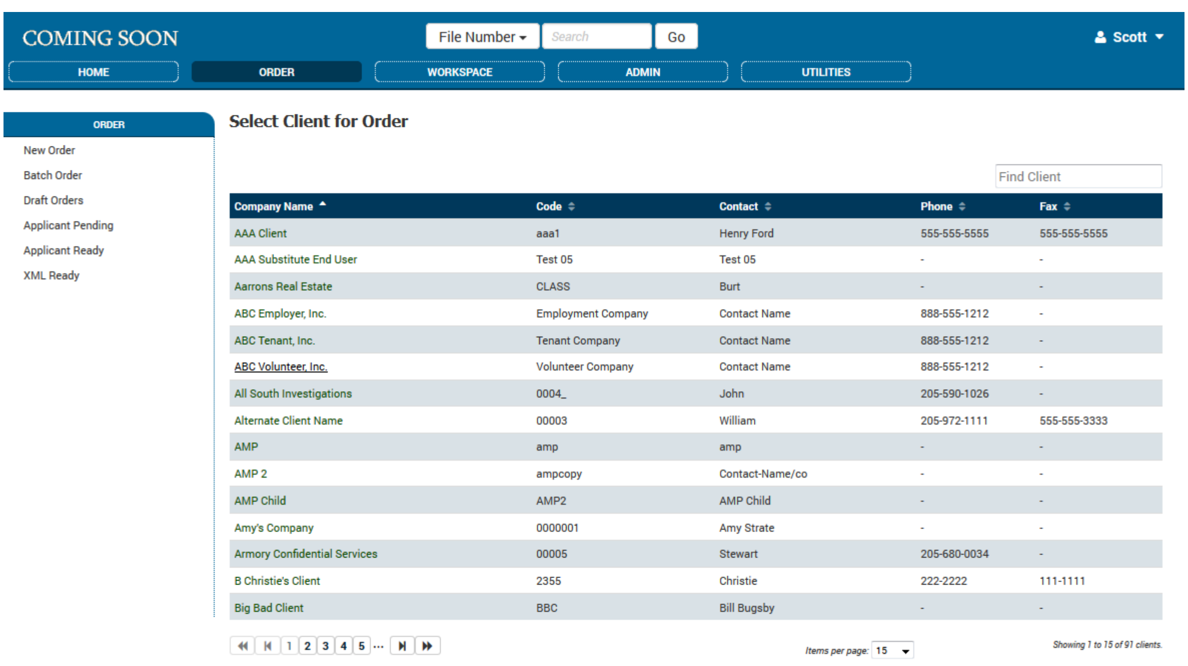
Most of the significant changes to date for InstaScreen™ 2.5 can be found in the New Order entry pages with new features and functionality to simplify workflow. Most pages will contain a ‘Next’ button to continue through the order process. The Cancel’ button will exit the order entry process without 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.

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.

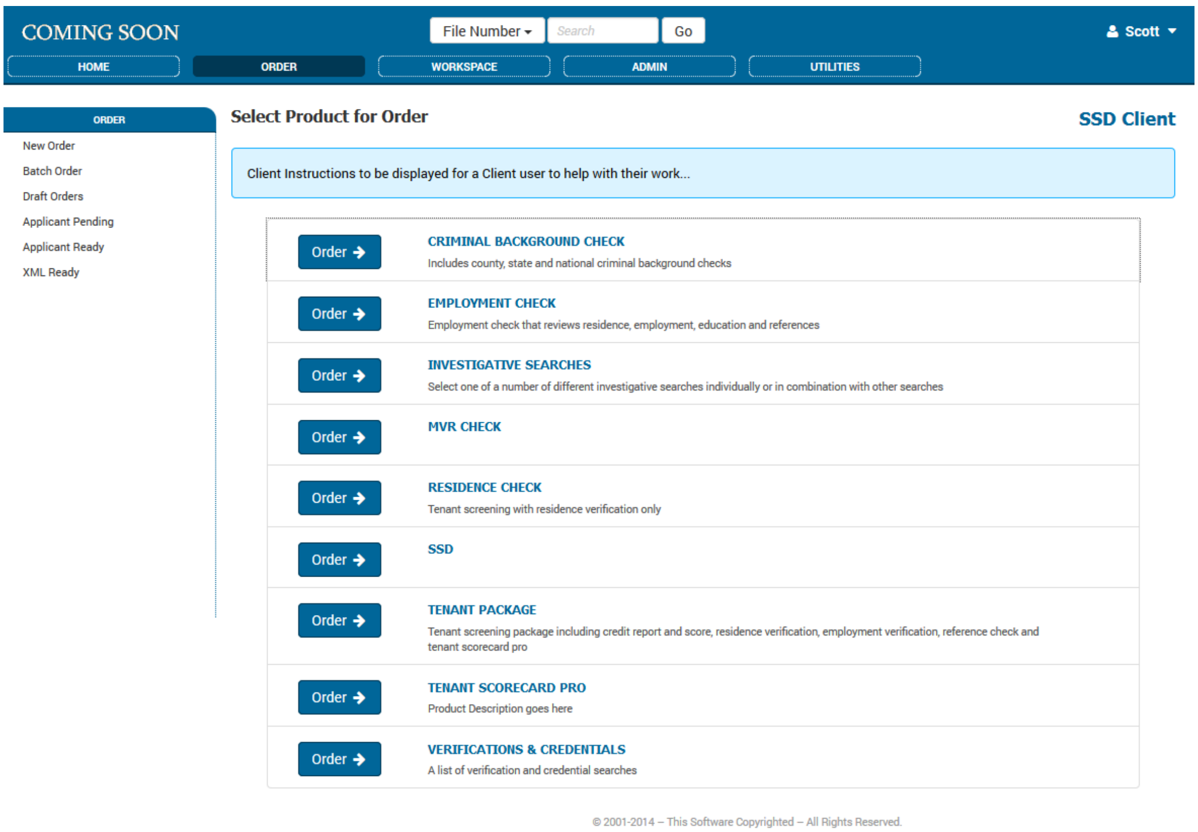


Select Product for Order

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.



<u>Order Data Entry</u>

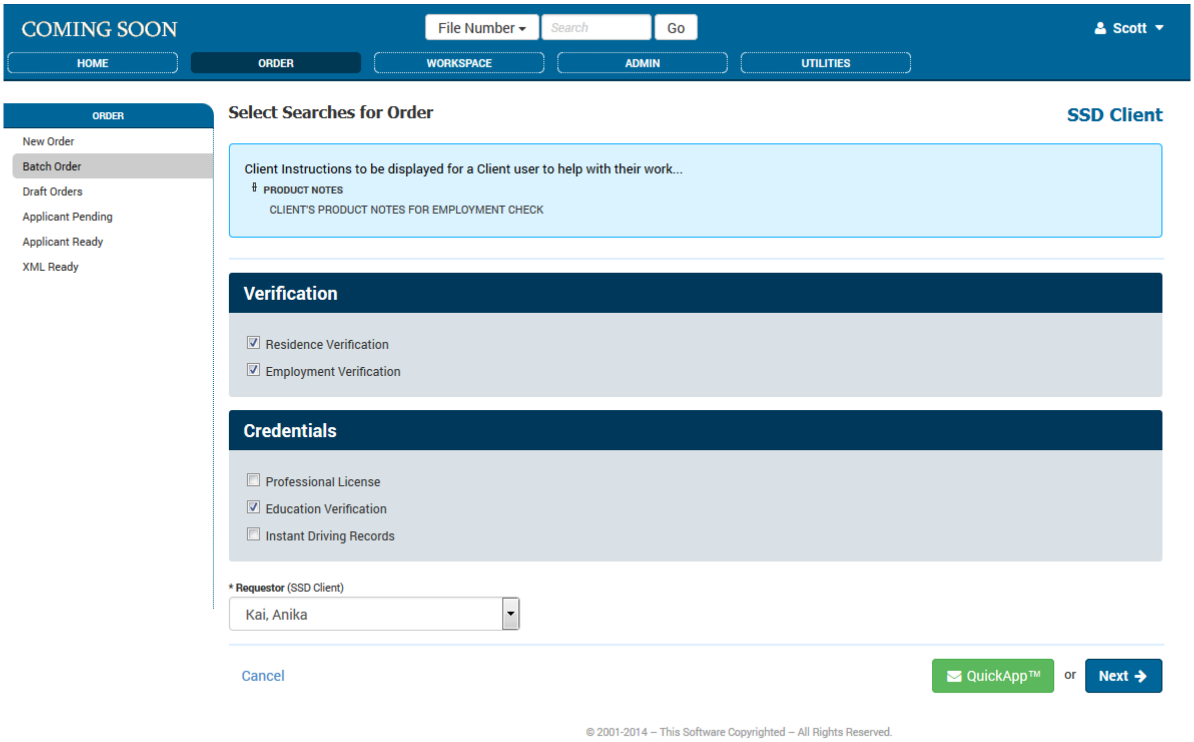
The individual pages that are presented for any given order depend on the types of data required for the selected Searches of the Product package for the Order. Throughout the Order Data Entry pages, icons and labels are used consistently to improve ease of use and workflow. Bordered sections indicate 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).

<u>Select Searches for Order</u>

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.

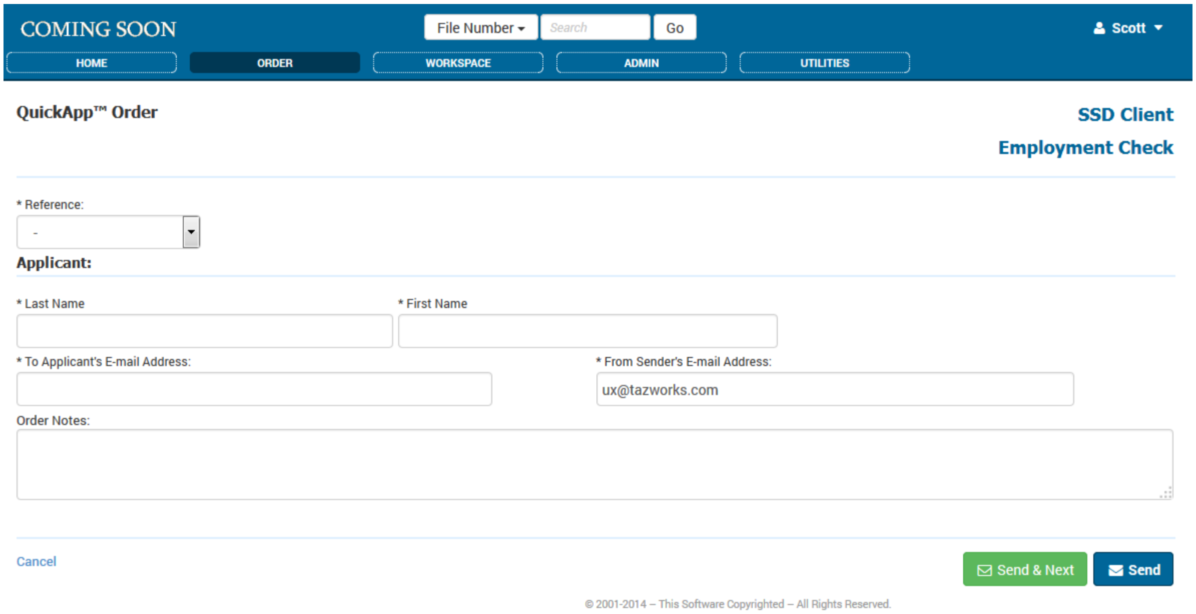
If an embedded QuickApp™ will be used with this Product package, the QuickApp™ button will be displayed, otherwise only the 'Next' button will be shown.



QuickApp™ Order

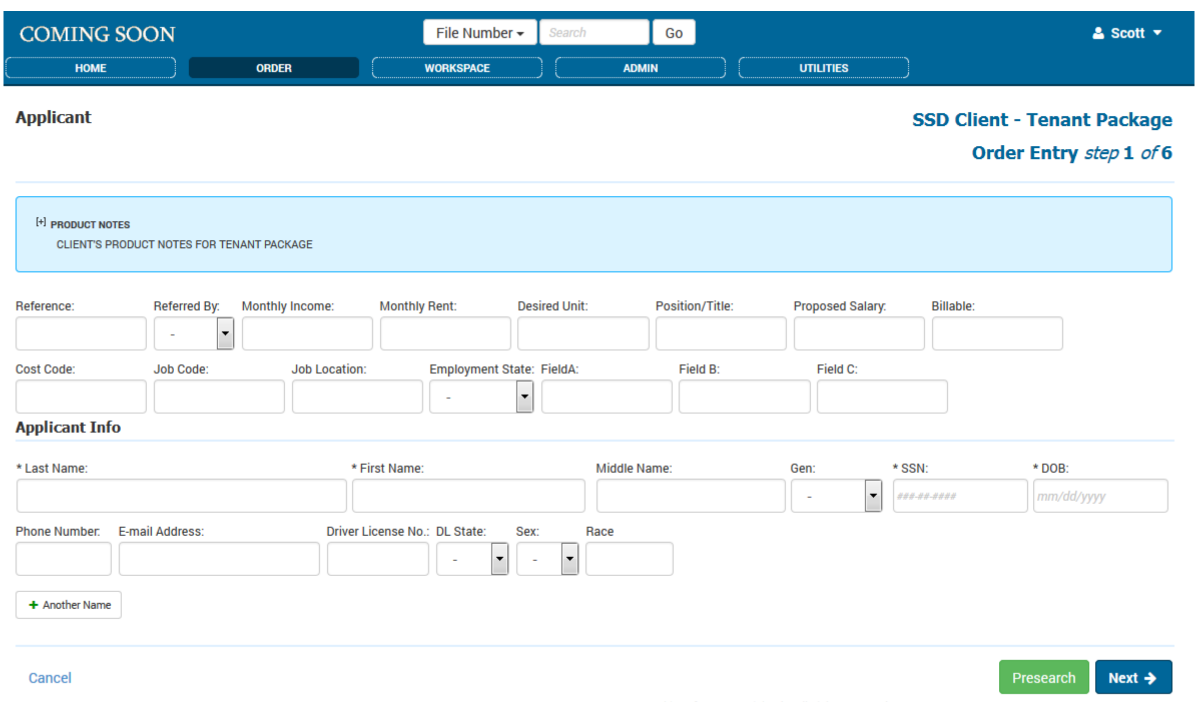
If the QuickApp™ is being used for the Order, the QuickApp™ Order page will display. In addition to the Applicant's name, Applicant's email (To Applicant's Email Address), 'From Sender' email address and Order Notes, there may be other applicant-related fields.

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.



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.



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

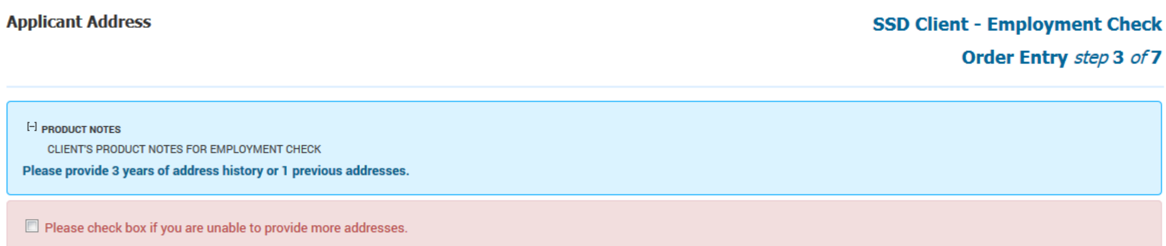
Clicking the ‘Presearch’ button will take you to the Presearch page which lists previous orders that are for the same applicant name, SSN or email. This allows you to determine if you wish to see an existing order or if you wish to continue with a new order.

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.

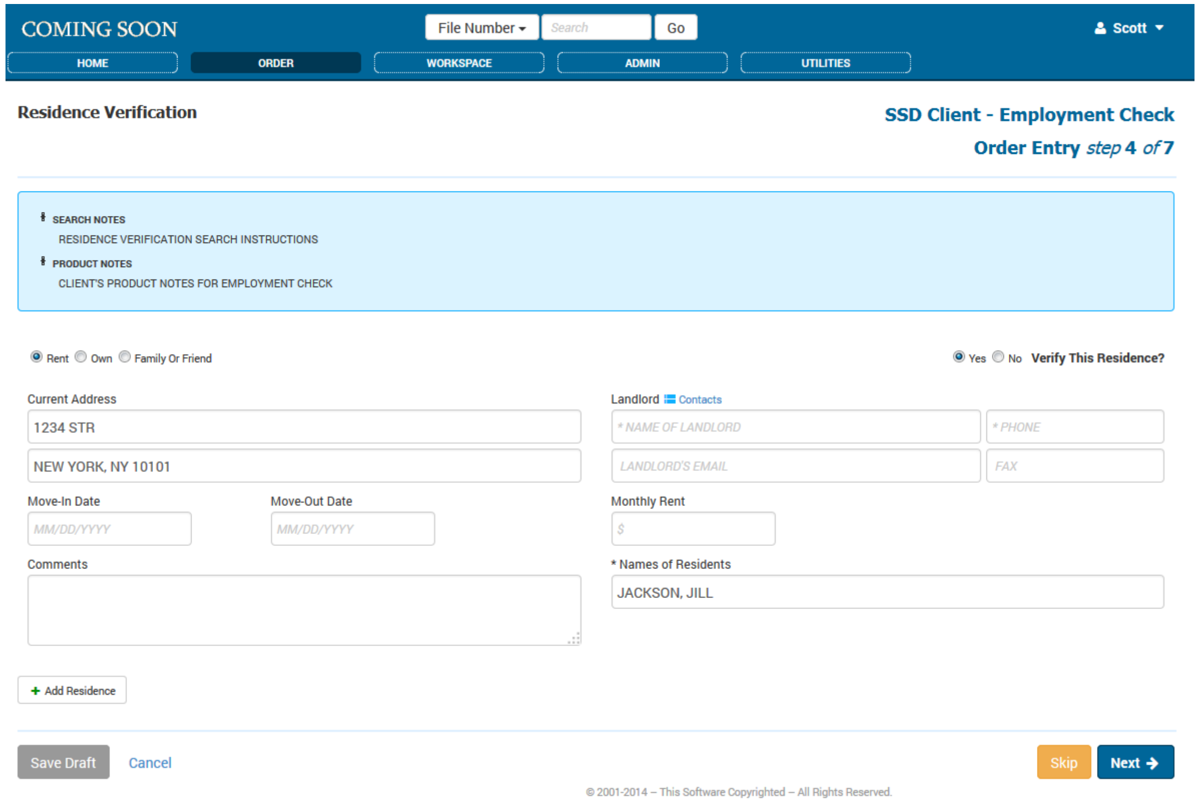
If the Product package has been configured to have a minimum number of years of address history or a minimum number of previous addresses, an instruction will appear just below the Product Notes. If you do not enter the minimum number of previous addresses, you will receive an alert. You may then add 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.



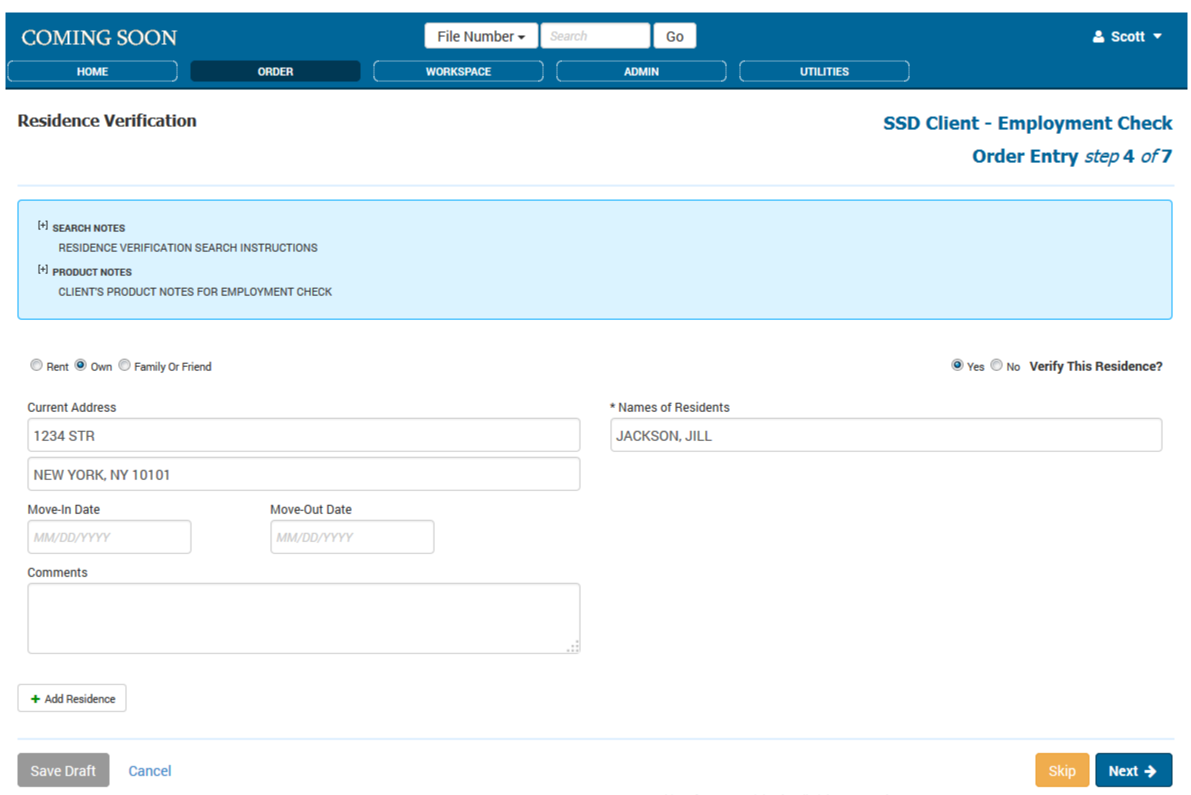
Residence Verification

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.

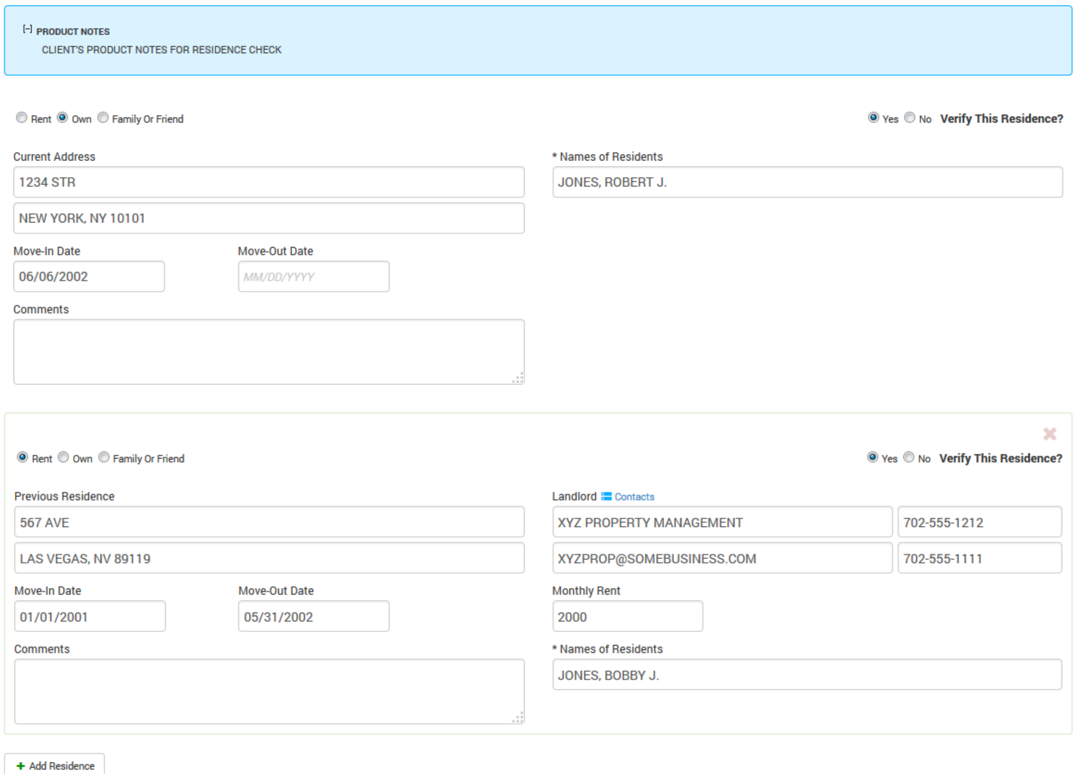


If ‘Own’ is selected as the type of residence for an address entry, the Residence Verification page will not include landlord data entry fields for that residence.



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

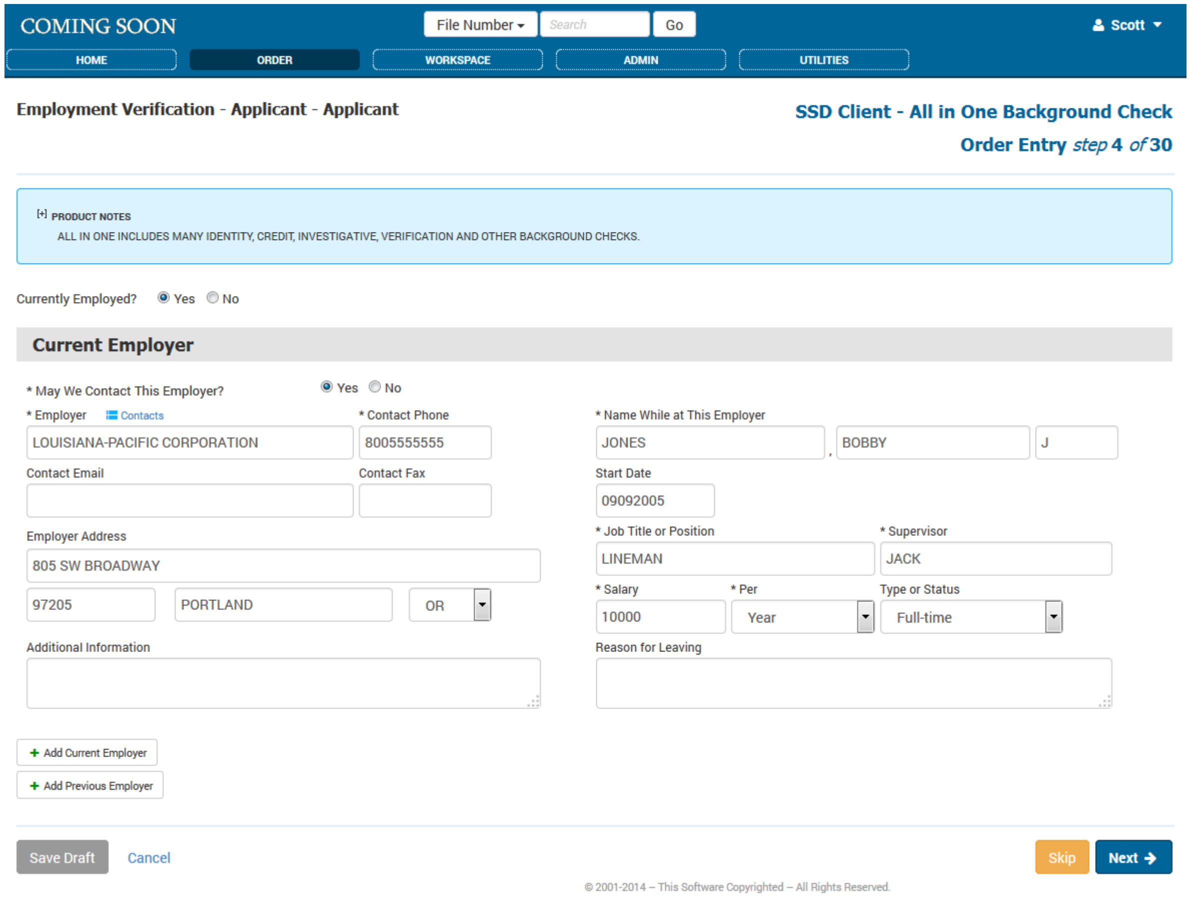
Clicking on the '+ Add Residence' button will open up a new bordered section to allow the entry of another residence address. The address can be Domestic (USA) or International. Previous Addresses can be entered.



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.



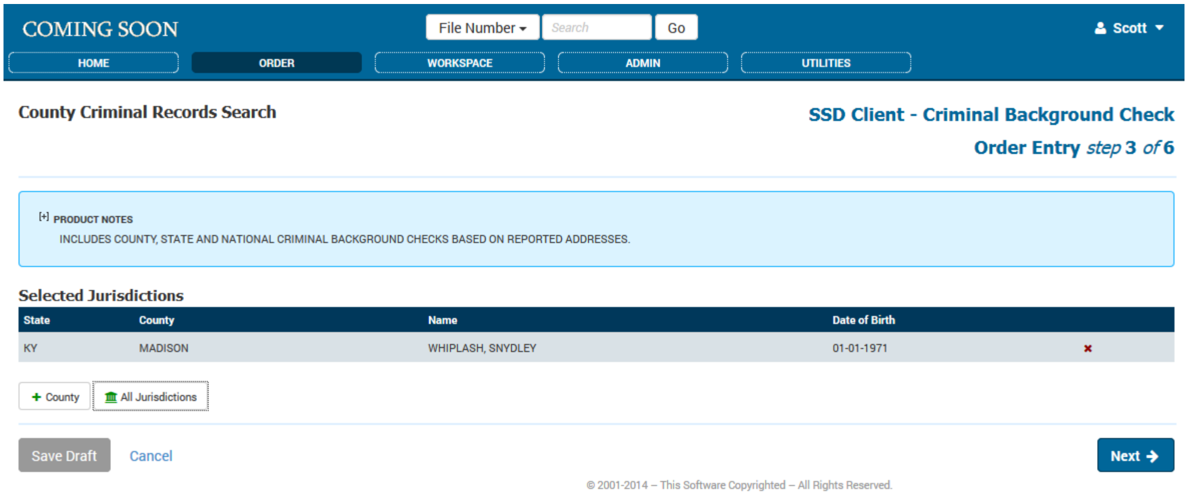
Additional employers can be added and are divided into Current Employers and Previous Employers. Clicking the Add Current Employer button presents a bordered section with relevant employer information fields. Clicking the Add Previous Employer button presents a bordered section for entering information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

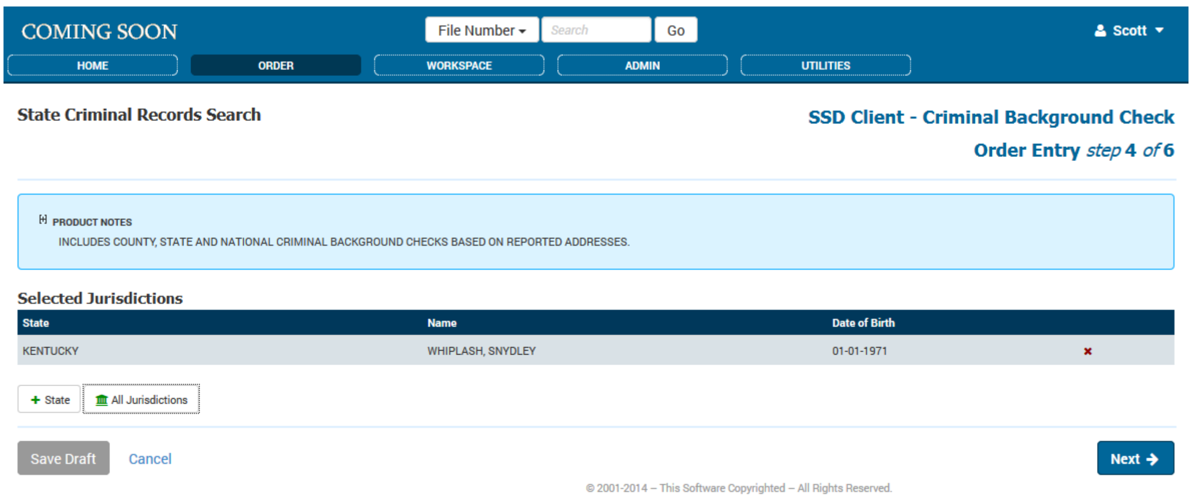
Clicking on the Contacts Lookup link (next to the Employer label) will open the Contacts Lookup for all Employer entries you have. If the entry can be edited, a pencil icon will appear at the right end of the entry's row. Employer contacts can be added or edited and then selected for use in the order.

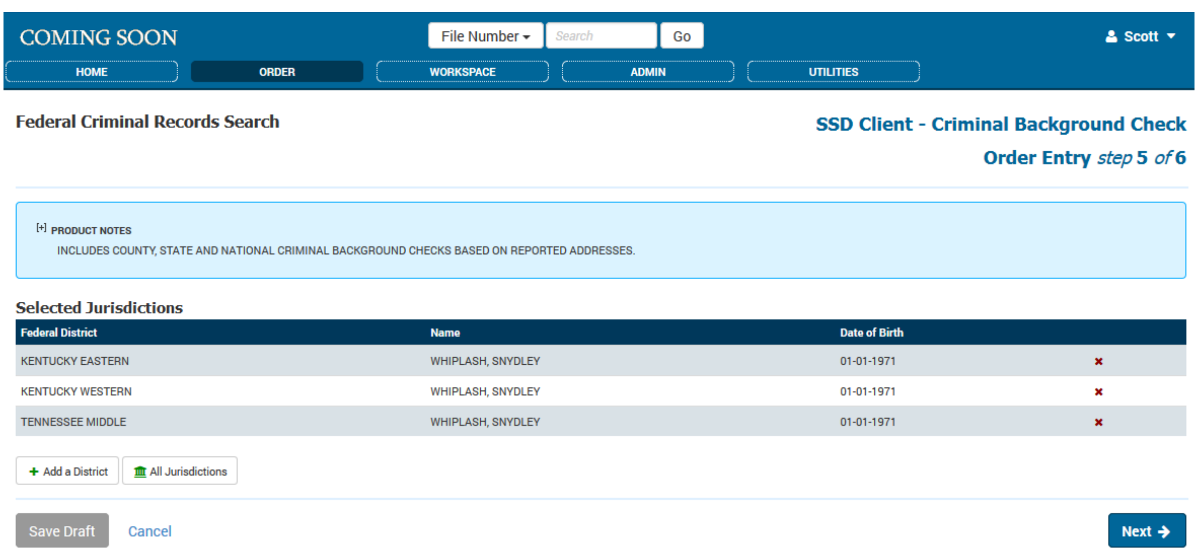
Selecting a Contact will copy the contact's information into the Employment Verification page in the appropriate section. Also, if the Employer information has already been entered onto the Employer Verification page, clicking on the Contacts link for that employer will allow you to add it as a contact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

County, State, Federal and International Searches

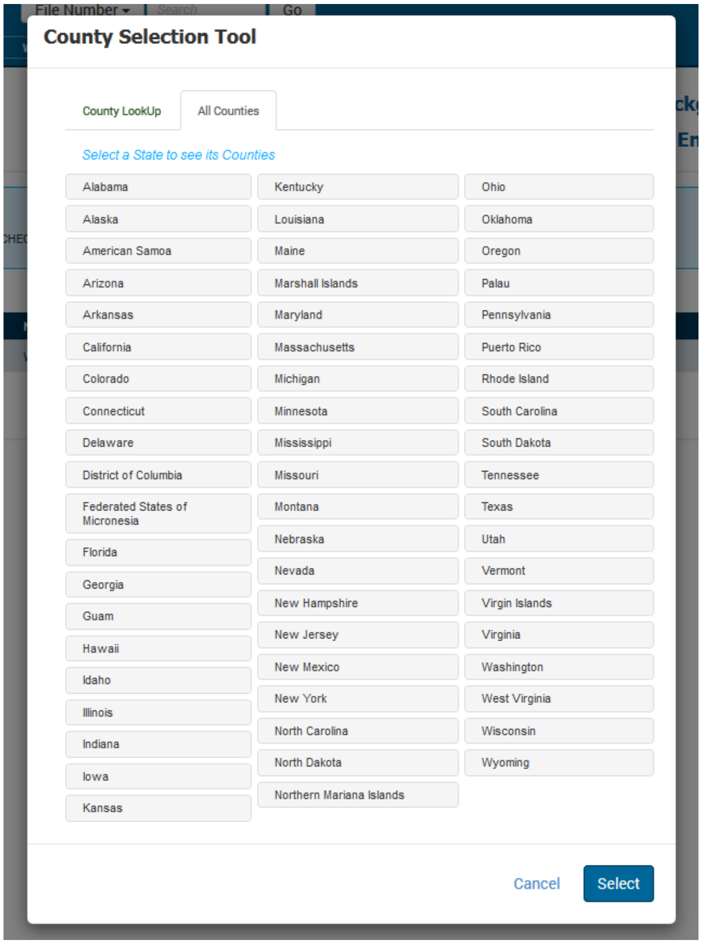
Most of the jurisdiction-based and investigative record searches have received only minor changes to the look and feel of each page. The primary change is the replacement of the 'Remove' button with the ubiquitous red 'X' button that when clicked will remove the entry from the list.

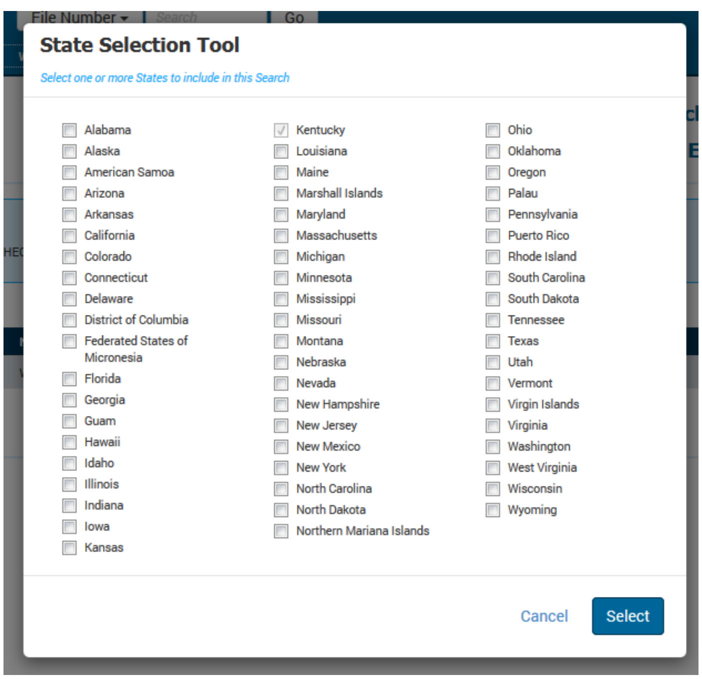


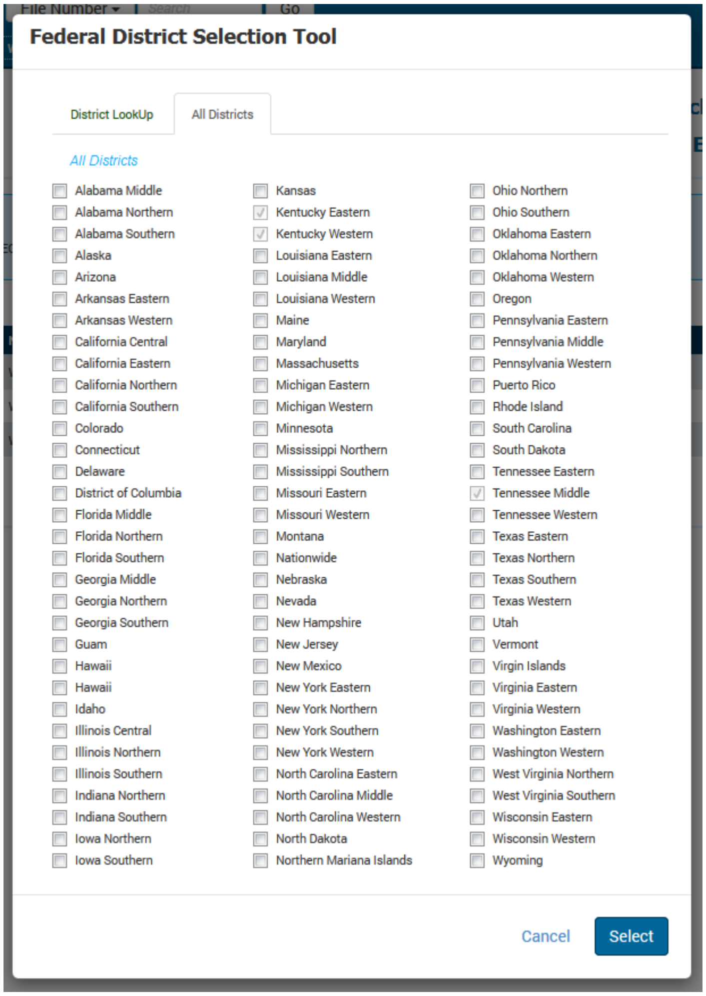


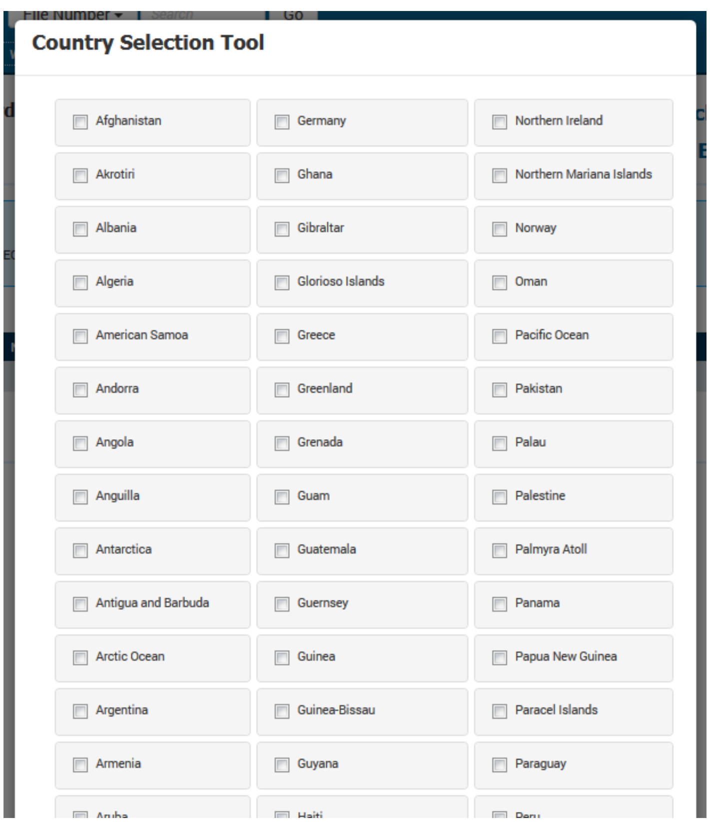


The various jurisdiction lookup tools have been redesigned to conserve space and make it easier to select one or more jurisdictions. County, State, Federal District and Country lookup popups have been restyled:


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


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

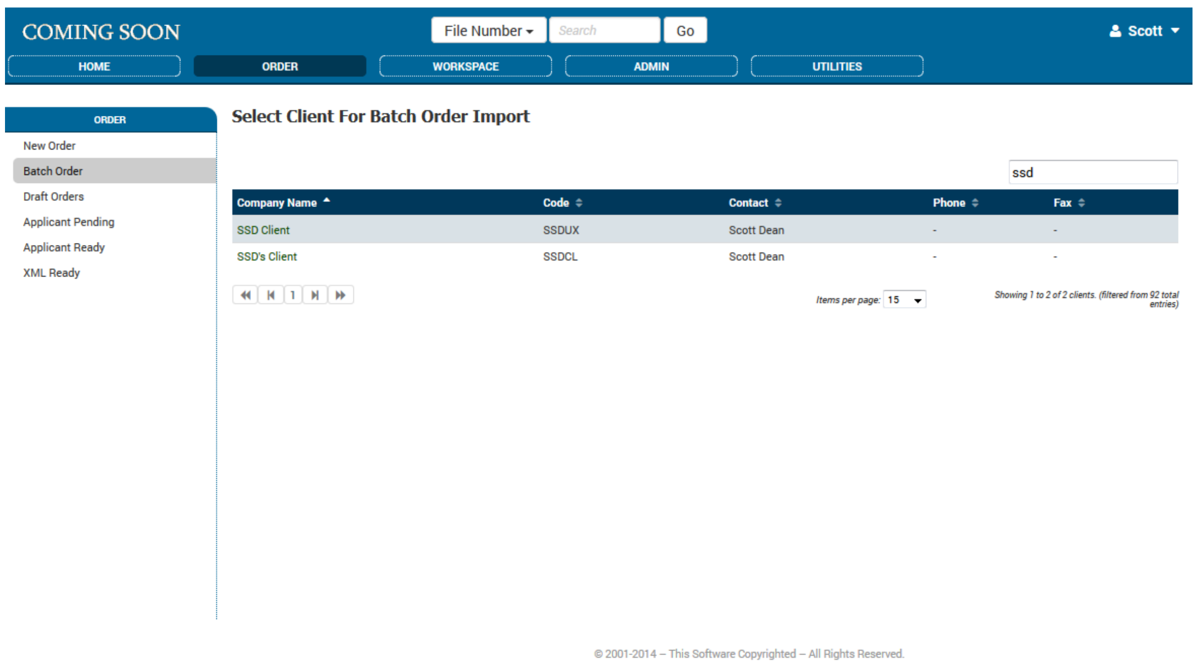

Federal District Selection Tool
District LookUp
All Districts
All Districts
Alabama Middle
Alabama Northern
Alabama Southern
Alaska
Arizona
Arkansas Eastern
Arkansas Western
California Central
California Eastern
California Northern
California Southern
Colorado
Connecticut
Delaware
District of Columbia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


Country Selection Tool
Afghanistan
Akrotiri
Albania
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Antigua and Barbuda
Arctic Ocean
Argentina
Armenia
Germany
Ghana
Gibraltar
Glorioso Islands
Greece
Greenland
Grenada
Guam
Guatemala
Guernsey
Guinea
Guinea-Bissau
Guyana
Northern Ireland
Northern Mariana Islands
Norway
Oman
Pacific Ocean
Pakistan
Palau
Palestine
Palmyra Atoll
Panama
Papua New Guinea
Paracel Islands
Paraguay

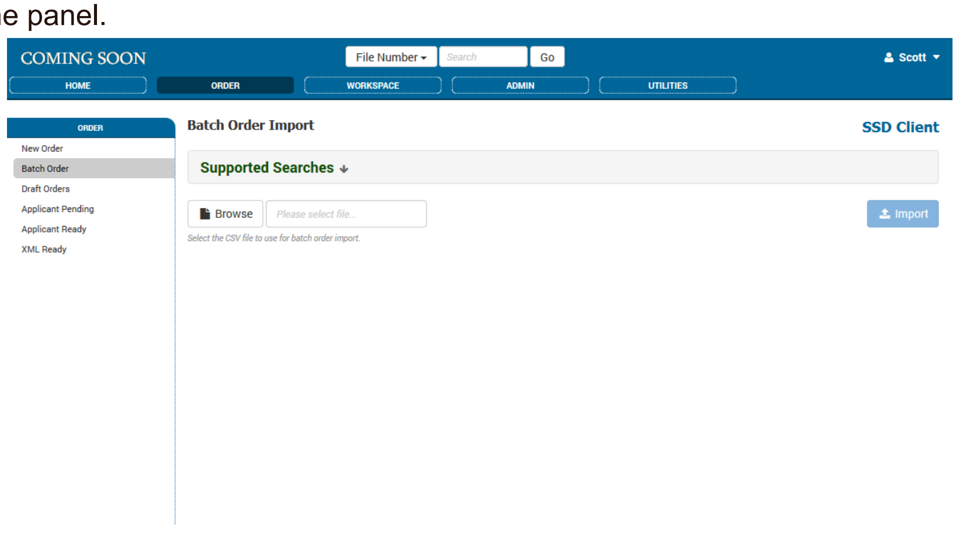
Select Client for Batch Order Import

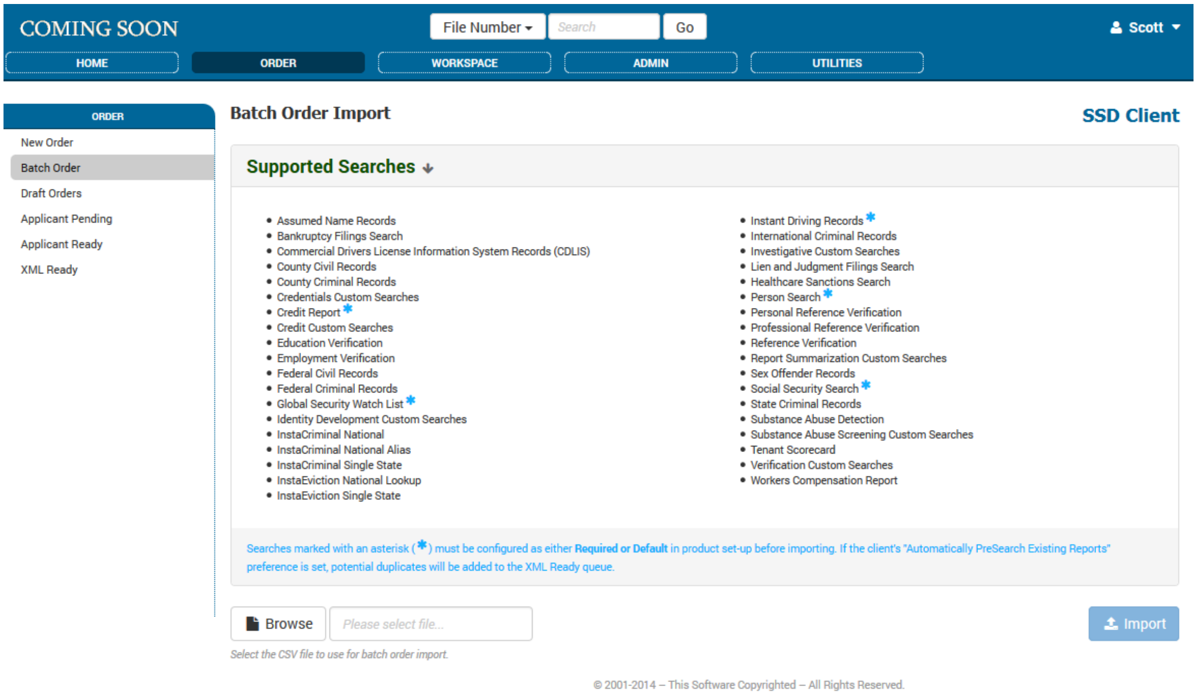
The new Select Client for Batch Order Import page has been redesigned so filtering and selecting are easier. When you click on the Batch Order sidebar menu link, as a CRA user you will see the Select Client for Batch Order Import page with your cursor in the 'Find Client' filter box. As you enter letters,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



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.



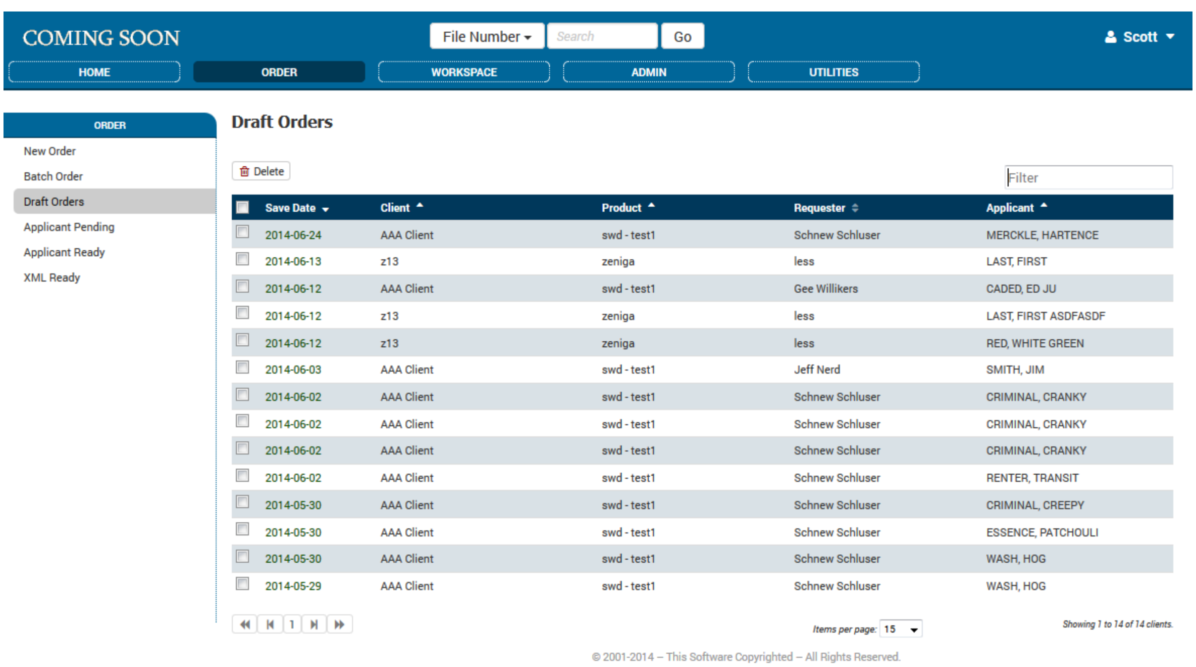


To import, click on the Browse button, select a CSV format file. Then click the Import button. A message will appear near the top of the page to advise you of the results of your import.

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

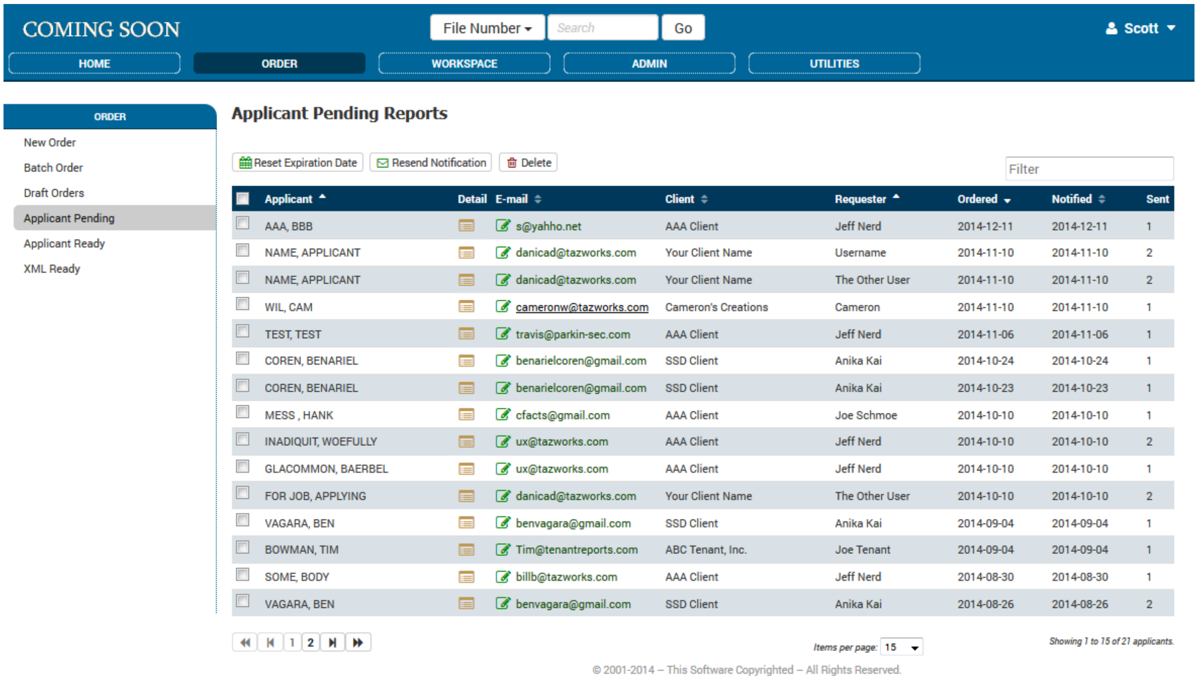
7. DRAFT ORDERS

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

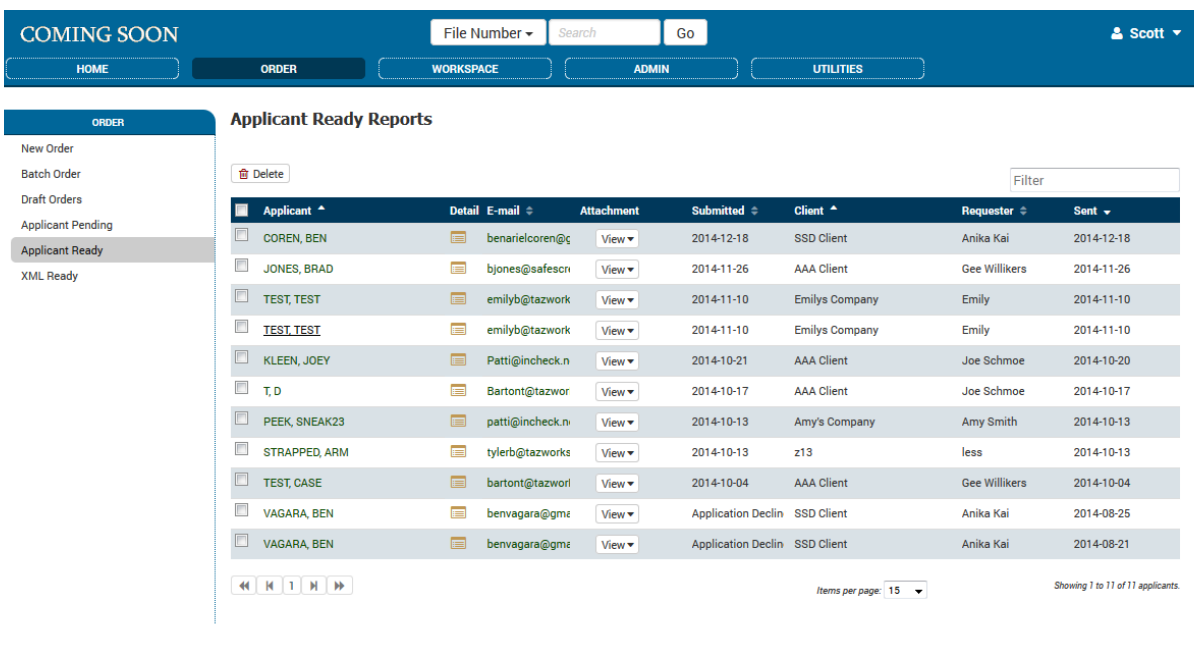


8. APPLICANT PENDING & APPLICANT READY

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.

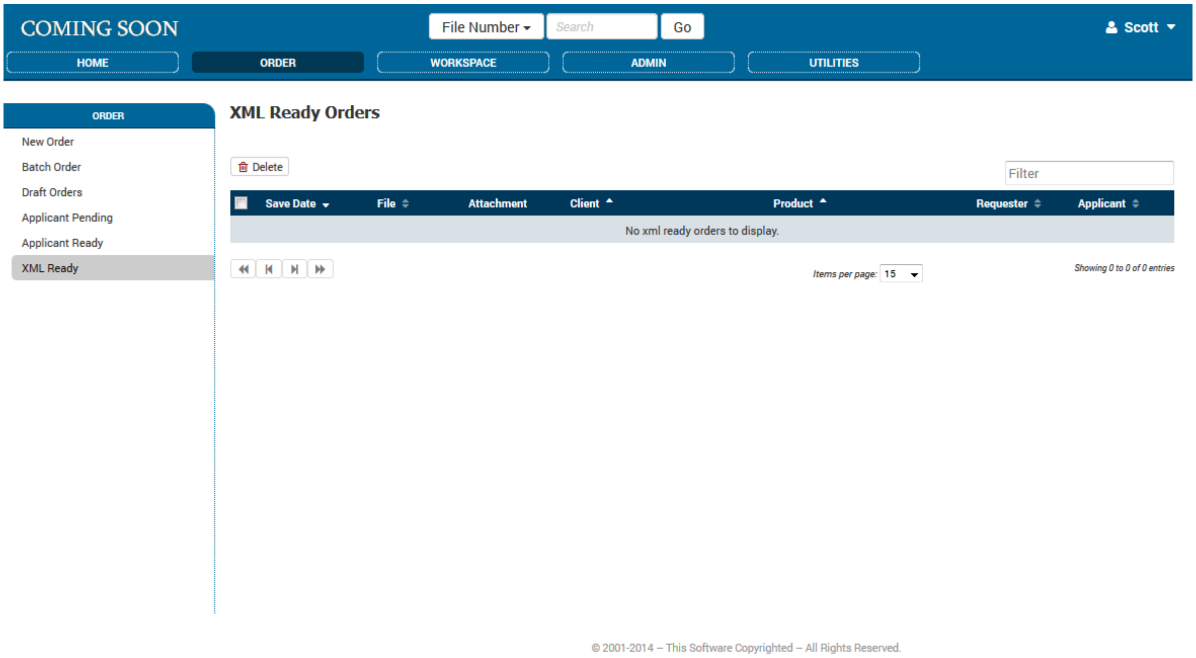


The Applicant Ready page displays a list of orders that are incomplete, but have been updated with information from the applicant via QuickApp™.



9. XML READY

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



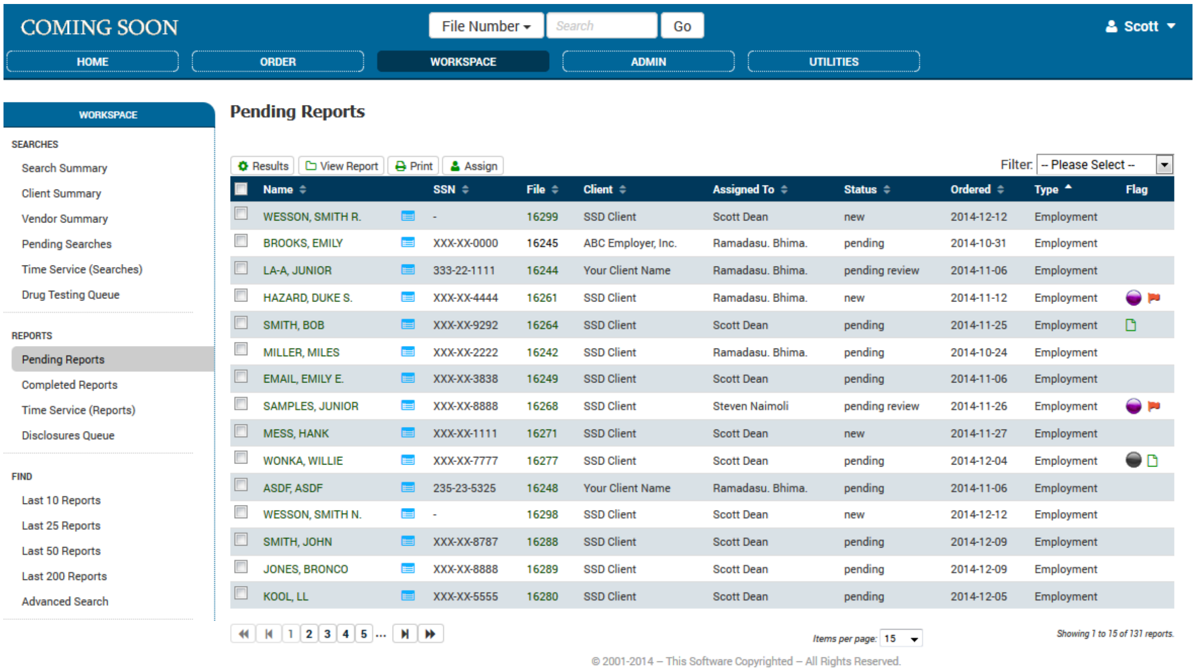
10. WORKSPACE – PENDING REPORTS

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.



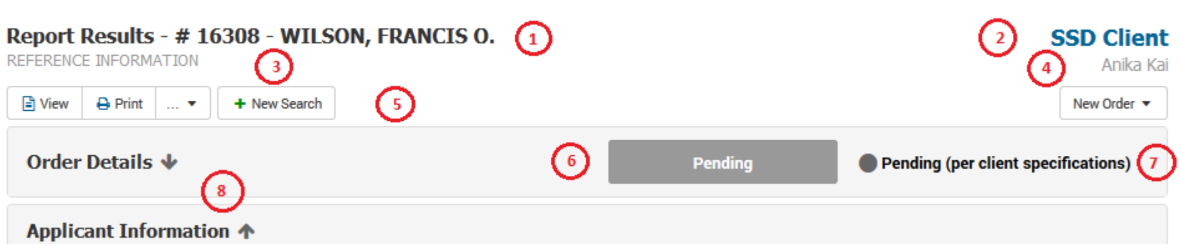
Name	SSN	File	Client	Assigned To	Status	Ordered	Type	Flag
WESSON, SMITH R.	-	16299	SSD Client	Scott Dean	new	2014-12-12	Employment	
BROOKS, EMILY	XXX-XX-0000	16245	ABC Employer, Inc.	Ramadasu. Bhima.	pending	2014-10-31	Employment	
LA-A, JUNIOR	333-22-1111	16244	Your Client Name	Ramadasu. Bhima.	pending 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	

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.

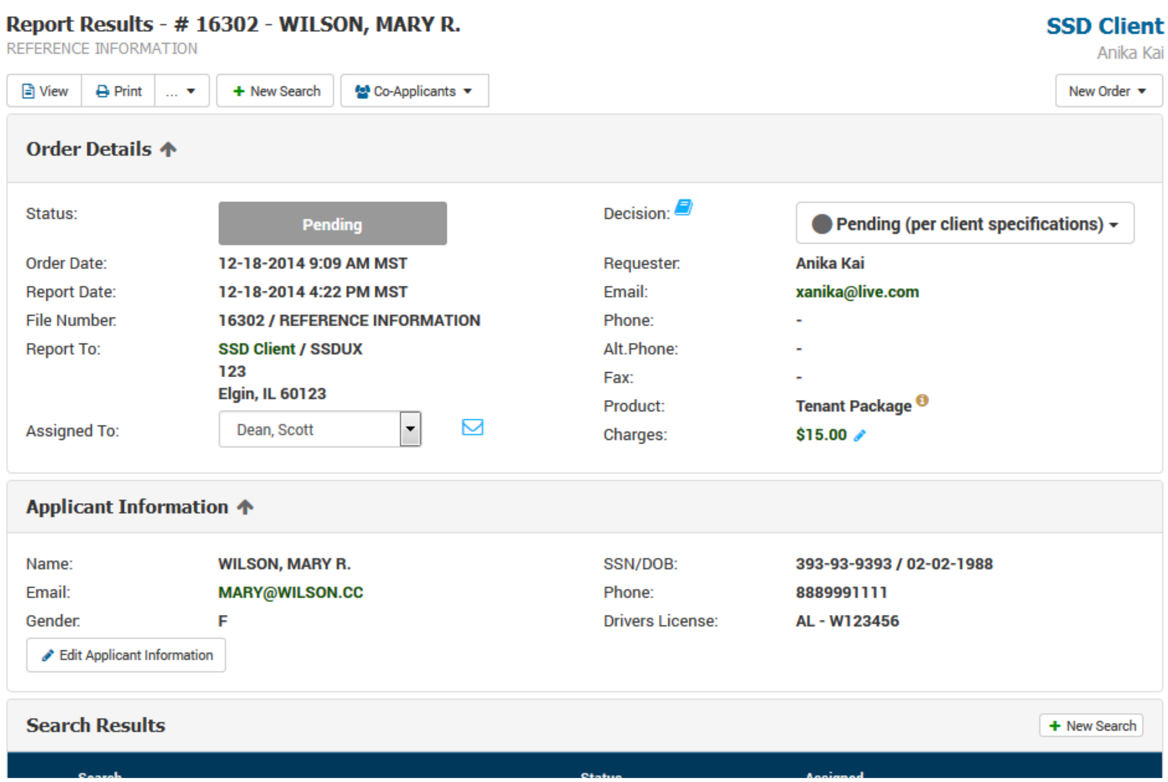
At the top of the Report Results page you will find:

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.



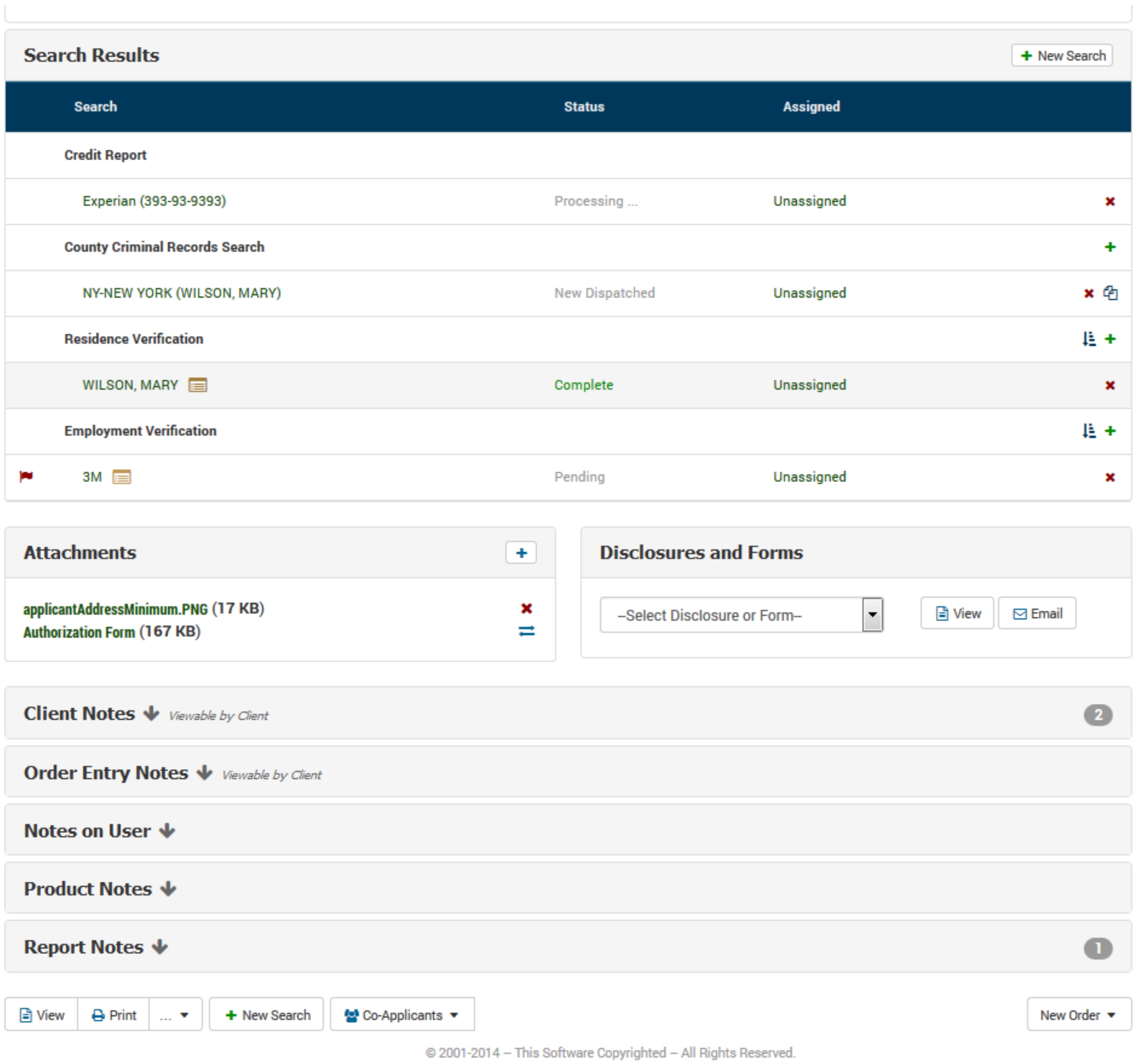
The row of Action Buttons are also located across the bottom of the page, including the View, Print, a dropdown button for less used actions like Restrict and Cancel. All order level buttons appear together. One important change is that the old ‘Add to Order’ button has been relabeled as the ‘Add New 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.



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).



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.

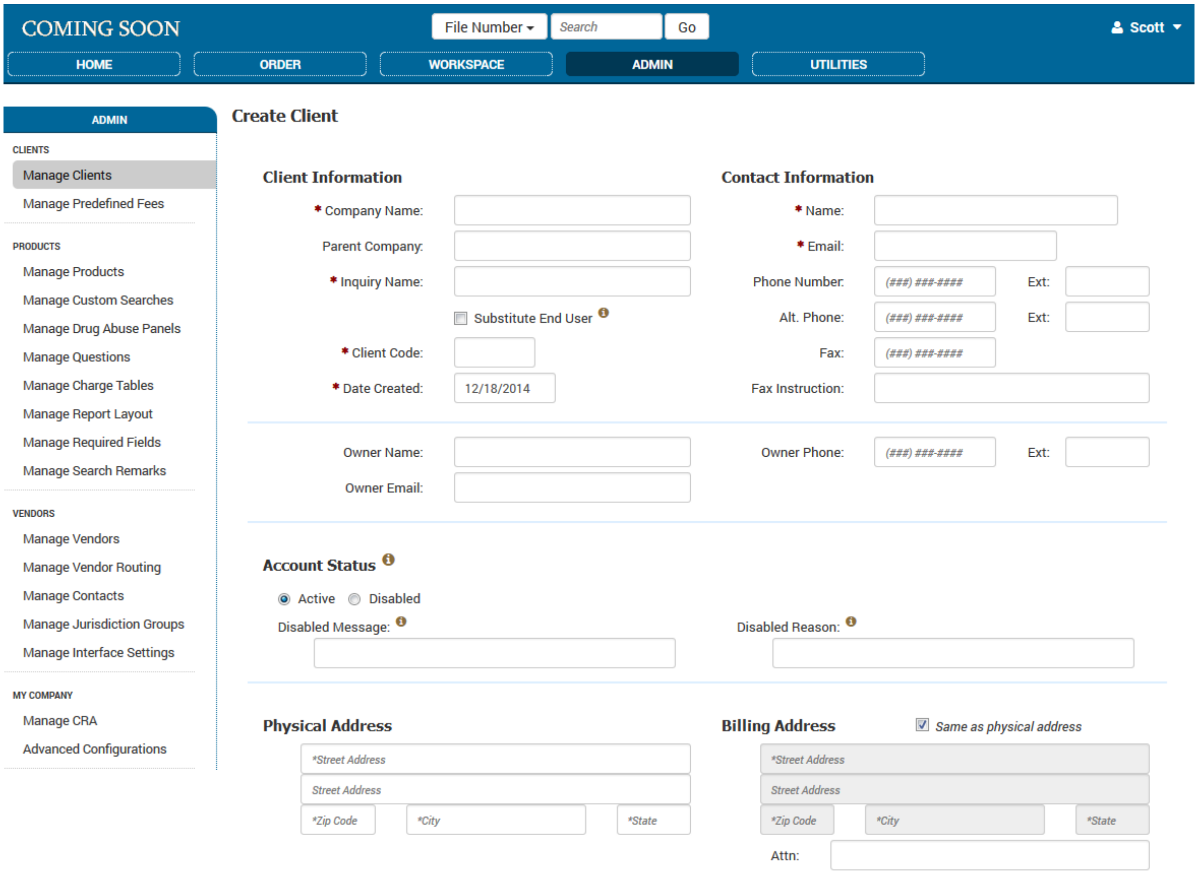
When you wish to add or edit notes, where allowed, an edit box will appear.

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

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:



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

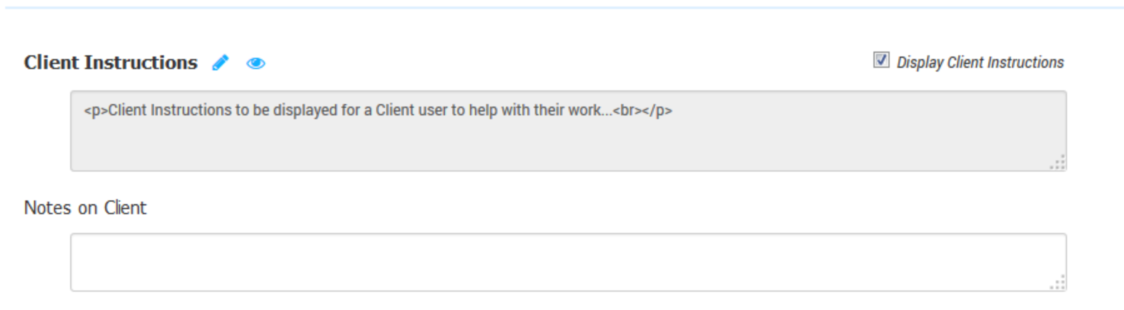
General information, client users and permissions, products for the client, client preferences, fees and billing information can all be added or edited by clicking on the appropriate tab.

Client Configuration Features

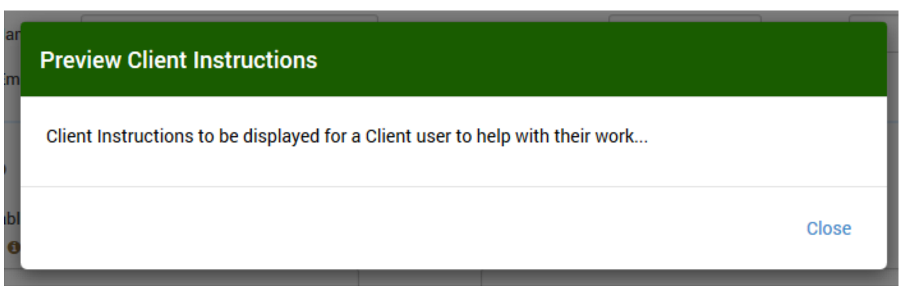
A number of new features have been added to the Client Configuration area to support new functionality throughout InstaScreen™ especially in the Order Entry area.

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.



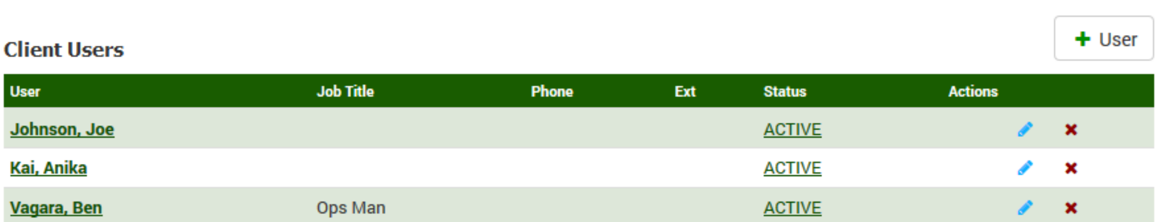
Client Instructions should be used for general instructions to the Client user to assist them in selecting the right product package and/or searches for an order. Client Instructions only appear on the selection pages at the beginning of order entry, while Client's Product Notes and Search Notes will 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
Johnson, Joe				ACTIVE	
Kai, Anika				ACTIVE	
Vagara, Ben	Ops Man			ACTIVE	

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

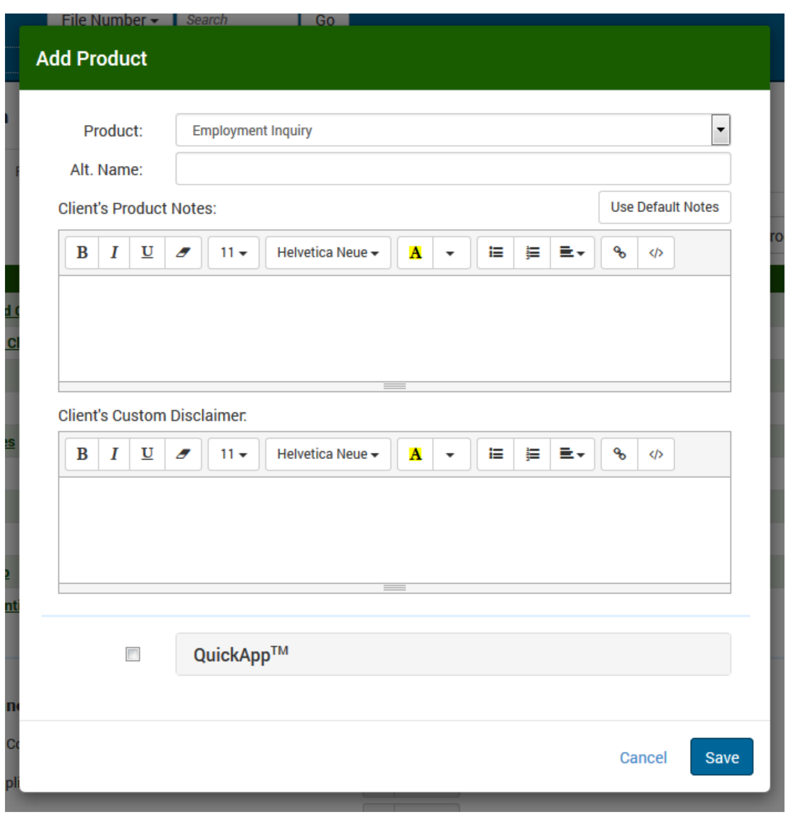
Client Products + Product

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

(pencil) and delete (red X).

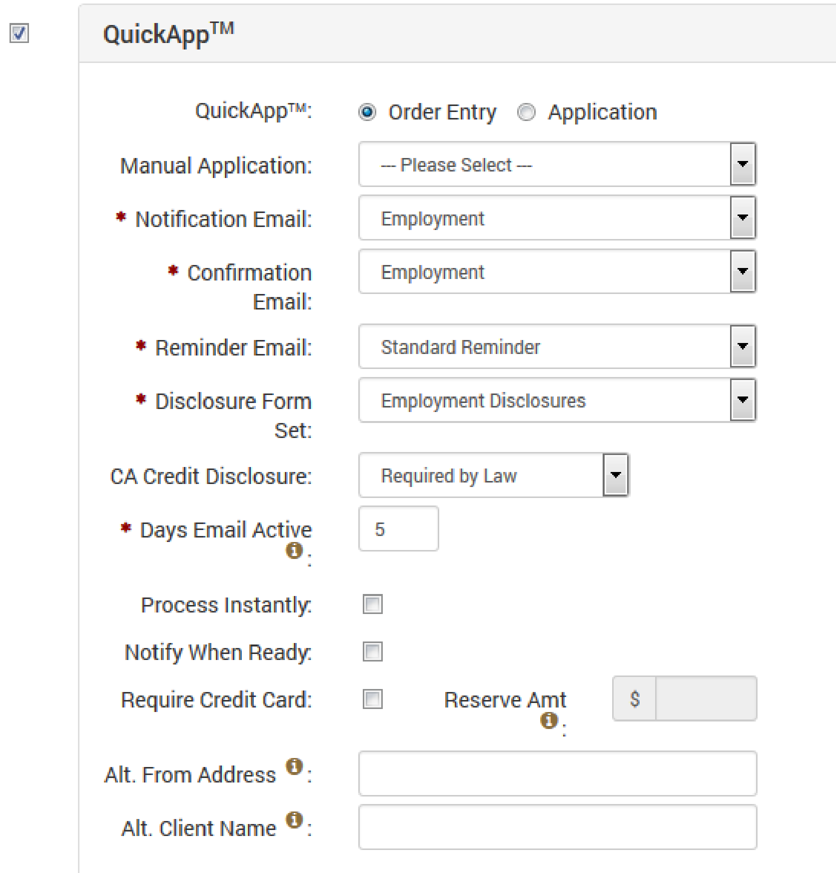
To add a Product for a Client, click on the +Product button. A modal appears that allows you to select one of your existing Products from a dropdown list. If you select a Product that has Default Product Notes content, the Use Default Notes button will appear that allows you to copy the Default Product 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.



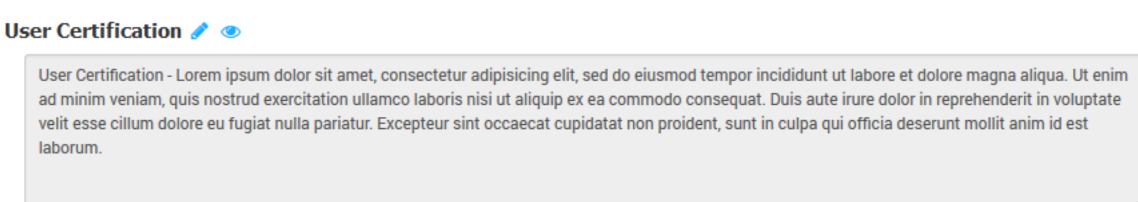
Note: The overall report has not been updated to use the Client's Custom Disclosure feature yet (31 Dec 2014)

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



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.

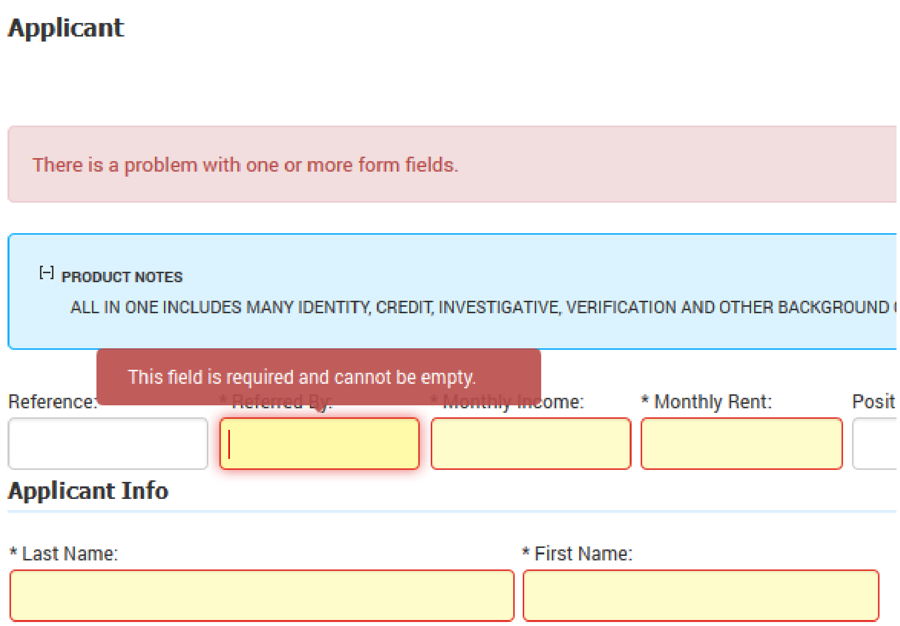


Client Fees and Client Billing:

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.



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!

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.