



EMPLOYMENT SCREENING RESOURCES®

ESRCheckSM – Client Portal New Features Guide



Welcome to ESR's new and improved ESRCheckSM Client Portal!


This guide provides an overview of the changes ESR has made to our interface to better serve our clients.

The new enhancements will:

- ✓ Extend a new and up to date look and feel
- ✓ Provide key metrics through a dashboard
- ✓ Offer improved menu navigation
- ✓ Enable streamlined data entry
- ✓ Improve the view for Orders and Invites (formerly "Alerts")




New Login Screens

ESR  EMPLOYMENT SCREENING RESOURCES® Wednesday, June 01, 2016

Support ESRCheck *Client* PORTAL

Login

Username	<input type="text" value="username"/>
Password	<input type="password" value="username"/>

ESR  EMPLOYMENT SCREENING RESOURCES® Wednesday, June 01, 2016 [Logout](#) [Home](#)

Support ESRCheck *Client* PORTAL

Dashboard

Invites

My Orders

Login

[Login Agreement](#) By logging in, I certify that I am an authorized user and that no orders will be entered into the system without a permitted purpose, notice to and written consent of the consumer.

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New Dashboard shows Key Metrics



Dashboard

30 Day Summary

Status	Count
Profiles In Progress:	0
Profiles Queued:	7
Invites Total:	21
Pending Response:	5
Invites Expired:	4
Consents Abandoned:	1
Orders Abandoned:	4

There are queued orders that need your attention.

Adverse Actions

Name	Date	Status
John Worker	5/16/2016	Preadverse

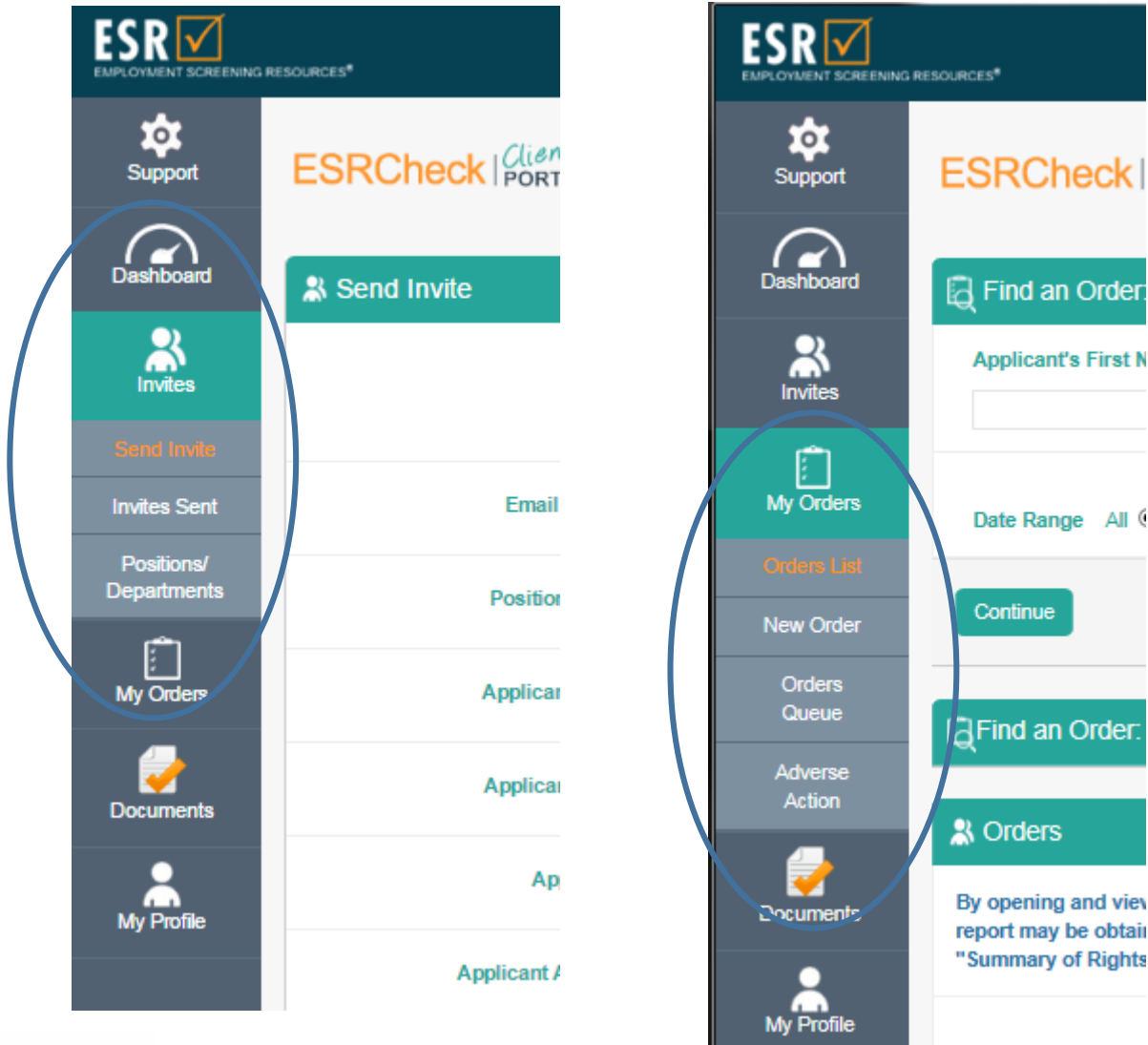
Open Tickets

Ticket #	Name
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Notifications



Improved Side Bar Navigation



1

Sending an Invite Registering an Applicant.



Send Invite

The 'Send Invites' function is used to invite your candidate into ESR's online process. Once invited, they will receive an email with instructions on how to login into the applicant facing application. As part of the process they will receive required notices, provide authorization and enter the information needed to complete their background check based on the package you have selected.

Email Subject Line	Rosen Smith LLP - Time-Sensitive Instruc
Position/Department	
Applicant First Name	first name
Applicant Last Name	last name
Applicant Email	email address
Applicant Access Code	KOSz63A4N5HO71au
Applicant Password	8dogDsWAWWWbxQeC
Expiration	6/8/2016
Order Delivery	Orders are sent directly to the Job Queue
Enable International	<input checked="" type="checkbox"/>
Package to Order	
Special Instructions (Optional)	

Send Invite **Cancel**

Registering Your Applicant is as Easy As 1-2-3.

1. Select a Position/Department
2. Enter Name (First/Last)
3. Enter Email Address
4. Select Package to Be Performed

Click Send Invite

2

Invites Sent

Viewing the Status of Sent Invites



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ESRCheck Client PORTAL

Invites Sent Filter Non-filtered list limited to 100 records

Filter By Status: Applicant's Last Name: Tracking/Reference: Profile ID: Applicant's Email:

[Continue](#)

Invites

Name	Type / Package	Date Sent	Expiration	Status	Email
Brad Landin (invite) # 62555 - click for details	Invite UI Test 1	05/26/2016 (invite)	06/02/2016	No Response Invite is active - click to edit	blandin@esrcheck.com (invite)
Brad Landin (invite) # 62554 - click for details	Invite AffinityTest	05/26/2016 (invite)	06/02/2016	Abandoned after Consent Invite is active - click to edit	blandin@esrcheck.com (invite)
Job # 6					
Job # 6					
sweet water (applicant) # 62521 - click for details	Invite UI Test 1	05/16/2016 (invite)	05/23/2016	Order Submitted Invite is active - click to edit	jcrockett@esrcheck.com (applicant)
d s (invite) # 62483 - click for details	Invite AffinityTest	05/03/2016 (invite)	05/10/2016	Expired Invite is active - click to edit	dstanderwick@esrcheck.com (invite)

The improved layout shows the current status for each candidate. You can choose to see additional details and/or update the invite.

3

My Orders Menu

Complete Management of New and Existing Orders



Access Orders, Place a New Order, View Your Order Queue and Manage Adverse Action.

The screenshot shows the ESRClient Portal interface. On the left is a navigation sidebar with icons for Support, Dashboard, Invites, My Orders (highlighted), Orders List, New Order, Orders Queue, Adverse Action, Documents, and My Profile. The main content area is titled 'ESRCheck Client PORTAL' and features a search section for finding orders. Below the search section is a table of orders.

Find an Order: Basic Filter

Applicant's First Name Applicant's Last Name Applicant's SSN (last 4) Date From - To Sort By

Date Range All < 24 hours 24-48 hours 48-72 hours > 72 hours

Find an Order: Advanced Filter

Orders

By opening and viewing a report for the first time, Client certifies that either directly or through ESR automation: (1) it has provided a written disclosure to the subject of the consumer report may be obtained for employment purposes (2) it has obtained written authorization from the subject to prepare a consumer report; it will provide a copy of the report and "Summary of Rights" to the subject before taking adverse action, and it will not use the report in violation of any equal opportunity laws or regulations.

Applicant	Date Submitted	Status	Actions
John Worker [75793] SSN xxx-xx-6789, DOB 3/5 Additional Information	5/26/2016 11:07:23 AM	0 of 5 Orders are complete Profile is Open Additional Information	View Report Choose Action
John Worker [75790] SSN xxx-xx-7895, DOB 3/5 Additional Information	5/25/2016 8:53:11 AM	0 of 5 Orders are complete Profile is Open Additional Information	View Report Choose Action
test test [75781] SSN xxx-xx-5555, DOB 10/15 Additional Information	5/19/2016 12:53:22 PM	0 of 12 Orders are complete Profile is Open Additional Information	View Report Choose Action

You can easily search just using the Name and/or SSN.

There are a wide variety of basic and advanced filtering options enable users to quickly find and view specific orders.

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My Orders

Locating Your Order Quickly & Easily



Basic and advanced filtering options allow you to pinpoint exactly what you are looking for.

The screenshot displays the ESRClient Portal interface. On the left is a vertical navigation menu with icons and labels for Support, Dashboard, Invites, My Orders (highlighted), Orders List, New Order, Orders Queue, Adverse Action, Documents, and My Profile. The main content area features the ESR logo and 'ESRCheck Client PORTAL'. Below this are two search sections: 'Find an Order: Basic Filter' and 'Find an Order: Advanced Filter'. The Basic Filter section includes input fields for Applicant's First Name, Last Name, SSN (last 4), Date From - To, and a Sort By dropdown. It also has radio buttons for Date Range: All (selected), < 24 hours, 24-48 hours, 48-72 hours, and > 72 hours. The Advanced Filter section includes dropdowns for Profile ID, Tracking/Reference, Review Status, Screen Status (set to In Progress), Screen Flagged, and Service. It also has dropdowns for Filter by User, Applicant Listed by Full Name, and Order is Archived (set to No). Both filter sections have a 'Continue' button.

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My Orders

Order View and Action Options



Users can choose from several “Actions” from the drop down menu and/or view detailed information using the “Additional Information” hyperlinks.

Orders ^

By opening and viewing a report for the first time, Client certifies that either directly or through ESR automation: (1) it has provided a written disclosure to the subject that a consumer report may be obtained for employment purposes (2) it has obtained written authorization from the subject to prepare a consumer report; it will provide a copy of the report and "Summary of Rights" to the subject before taking adverse action, and it will not use the report in violation of any equal opportunity laws or regulations.

Applicant	Date Submitted	Status	Actions
Trevor Alibaba [75810] SSN 123-45-6789, DOB 12/7/1941 Additional Information	6/1/2016 5:58:00 PM	0 of 6 Orders are complete Profile is <i>Open</i> Additional Information	<div style="background-color: #008080; color: white; padding: 2px; text-align: center;">View Report</div> <div style="border: 1px solid #008080; padding: 2px;"> Choose Action ▾ Choose Action Status Notes Tickets Uploaded Files Order Form Consent Form Fees New Order </div>
Him Her [75809] SSN 321-21-4321, DOB 2/30/1994 Additional Information	6/1/2016 3:02:16 PM	0 of 8 Orders are complete Profile is <i>Open</i> Additional Information	

Applicant	Date Submitted	Status	Actions
Trevor Alibaba [75810] SSN 123-45-6789, DOB 12/7/1941 Additional Information Order Number: 20160601180143.78449 Order Created: 6/1/2016 6:01:43 PM Last Updated: 6/1/2016 6:01:43 PM Submitted By: Customer (no login) Company: Rosen Smith LLP Position Name: Paralegal Position Code: STF8654 Sent Date: 5/31/2016 3:05:01 PM Sent Name: Tipees Wigwams Email: dstanderwick@esrcheck.com Username: ej0z2r1WSs4Yh8Ju Expires: 6/7/2016 Description: Package: US Resident and US Based Hire	6/1/2016 5:58:00 PM	0 of 6 Orders are complete Profile is <i>Open</i> Additional Information Delivery: <i>Queue</i> Summary: <i>Not Transmitted</i> Review Status: <i>New</i> Tracking 2: Paralegal	<div style="background-color: #008080; color: white; padding: 2px; text-align: center;">View Report</div> <div style="border: 1px solid #008080; padding: 2px;"> Choose Action ▾ Choose Action Status Notes Tickets Uploaded Files Order Form Consent Form Fees New Order </div>

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New Orders

Placing a Manual Order



Initiate a manual order from the New Order menu.

The screenshot displays the ESRCheck Client Portal interface. On the left is a vertical navigation sidebar with icons and labels for: Support, Dashboard, Invites, My Orders (highlighted in teal), Orders List, New Order, Invites Queue, Adverse Action, Documents, and My Profile. The main content area features the ESRCheck Client Portal logo and a section titled 'Select Packages and Services'. Below this title is a table with the instruction 'Select available services and/or packages for this order.' The table has a column labeled 'Select a Package' which contains a dropdown menu. The dropdown menu is open, showing the following options: '(no package selected)', '(no package selected)', 'Brazil', 'emped', 'Mexico', 'Non Attorney' (highlighted in blue with a mouse cursor), 'Sweden', 'United Kingdom', and 'US Resident and US Based Hire Standard'. At the bottom of the page, there is a copyright notice: '© 2016 ESR, Inc. All rights reserved. Privacy Statement.'

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Adverse Action

Initiate & Manage Adverse Action



ESRCheck Client PORTAL

Adverse Action List Filter

Customer	Applicant	Status	Applicant's Last Name	Applicant's SSN (last 4)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Filter List

Applicants *list is limited to 100 by pre-adverse date*

Applicant / Company	Status	Action
[75793] John Worker : xxx-xx-6789 [248] 2Testing Applicant Created: 5/26/2016 11:07:23 AM Applicant Email: imaapplicant2013@gmail.com	AA Status: <input type="text" value="Pre-Adverse"/> Pre-Adverse: 5/27/2016 2:15:59 PM	Update Adverse Action
[75790] John Worker : xxx-xx-7895 [248] 2Testing Applicant Created: 5/25/2016 8:53:11 AM Applicant Email: imaapplicant2013@gmail.com	AA Status: Not Set	Begin Adverse Action
[75781] test test : xxx-xx-5555 [248] 2Testing Applicant Created: 5/19/2016 12:53:22 PM Applicant Email: dstanderwick@gmail.com	AA Status: Not Set	Begin Adverse Action



If you have any questions about the new ESRCheck Client Portal, please contact our customer service team at 888-999-4474.

We are here to help you with any questions!