

# Welcome to SterlingONE New User Tutorial

Verified Person to SterlingONE

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# Tutorial Objective - Table of Contents

**This tutorial was created to help you easily transition from the Verified Person platform to your new SterlingONE platform.**

Once you have logged into the system, you will find a personalized platform for your screening and onboarding needs based on your company's requirements.

- **Log in to SterlingONE**
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- **Navigate the SterlingONE Dashboard Tab**
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# Benefits of moving to the SterlingONE platform

## Simple Dashboard:

- Monitor critical onboarding documents such as I-9 using My Tasks and Upcoming Due Dates widgets right within the platform.

## Streamlined Candidate Experience:

- Secure, easy to use candidate portal.

## Common SSN Trace Results:

- SterlingONE provides more detailed SSN Trace results and discrepancies.

## Reporting Capabilities:

- Users can easily generate TAT and Invoicing/Billing reports.

## Managing Notifications:

- Users can customize notifications for their accounts.

## Integrations:

- Reduce screening turnaround times with SterlingONE's seamless vendor integrations such as NSCH, Talx, E-Verify, etc.

## Help & Resources:

- Self-help, access to training webinars, and much more using our Community knowledge base.

# Glossary of Terms

# SterlingONE Terms and Definitions

<b>Dashboard:</b>	<ul style="list-style-type: none"><li>•A simple web-based user interface making it easy to submit orders and centrally manage all hiring activities for candidates and new hires.</li></ul>
<b>Launch:</b>	<ul style="list-style-type: none"><li>•Launching an order requires that you, as the client, complete the required data entry for your candidate in order to run a report.</li></ul>
<b>Ticket:</b>	<ul style="list-style-type: none"><li>•This is similar to the Verified Person eApp. Tickets are sent to candidates to complete the required data entry electronically, versus you needing to complete it via the launch process.</li></ul>
<b>Candidate Profile</b>	<ul style="list-style-type: none"><li>•Consolidated view that houses all screenings, ticket history, and documents for a single candidate.</li></ul>
<b>Candidate ID:</b>	<ul style="list-style-type: none"><li>•This is a unique number associated to each candidate profile. Every report run on an individual candidate will be housed under that candidate record.</li></ul>
<b>Report ID:</b>	<ul style="list-style-type: none"><li>•This is a unique number associated to each candidate report. A candidate could have multiple reports within their candidate profile.</li></ul>
<b>EDA:</b>	<ul style="list-style-type: none"><li>•Electronic Disclosure and Authorization, Sterling Talent Solutions offers an electronic release process if a paper release has not been signed by the candidate.</li></ul>
<b>Candidate portal:</b>	<ul style="list-style-type: none"><li>•Online branded portal for candidates and new hires to interact with your organization.</li></ul>
<b>SterlingONE Admin:</b>	<ul style="list-style-type: none"><li>•Robust customization tools empower you to manage the branding, messaging, and media assets of the candidate portal, as well as set up user permissions, email template groups, and more.</li></ul>
<b>Parent User:</b>	<ul style="list-style-type: none"><li>•The administrator on the account who is authorized to add users, view billing and invoices, and approve changes to the account. There is only one true parent user, however additional users may be given parent level access.</li></ul>

# Login Experience

The **orange slides** reflect the Verified Person platform experience.

The **blue slides** reflect the new SterlingONE experience.

# Verified Person: Login Process (Previous experience)

- Previous login experience on Verified Person:

*Login*

**Terms and Conditions**  
Please select a purpose for this session. By accessing this product, you (user) verify that you have a legitimate permissible business purpose to access the information provided, that you are the appropriate representative with privileges to access the information, and the information is being accessed for a single purpose from the presented list. If you conduct more than one search during this session and your purpose changes, you are required to logout and select a new purpose. Any use of the information other than for the selected purpose is a violation of the user's agreement with Verified Person and federal and state laws, and is grounds for termination of the agreement and referral to the appropriate investigative agency. By accessing this information you verify that you are compliant with the FCRA and all applicable federal, state and local laws, including limitations on driving records under the Driver's Privacy Protection Act and related state laws, and will not share the information or provide it to anyone other than the subject consumer or a joint user having the same purpose selected. For special provisions for employment purposes, [click here](#).

Purpose

Account

User ID

Password  [Forgot your password? Click here.](#)  
**Note:** Password is case sensitive.

**LOG IN**

[Privacy / Security / Legal Policy](#)



# SterlingONE: Login Process (New experience)

- To log in to SterlingONE, access <https://www.talentwise.com/screening/login.php>
- Enter your email address and temporary/permanent password, click Sign In.



"Purpose" is now set at the account level (Employment Purposes), there is no option to change this when logging in.

**Sign in to SterlingONE**

Your Email Address

Your Password

[Sign In](#) [Forgot your password?](#)

**Are you new to SterlingONE?**  
It takes just a few minutes to set up a new account for employment screening. [Get started now!](#)

## TalentWise is now SterlingONE!

Enjoy the same streamlined experience and all of the screening and hiring benefits that you and your candidates have come to know and trust.

Please use your email address and password to access your personal dashboard. From there, you can run employment or background checks, request a drug test, initiate onboarding, view reports, check statements and invoices, and more.

**Note:** If you cannot locate your temporary password, please click "Forgot your password?" to receive a new temporary password via email.

# SterlingONE: Login Process - Change Temporary Password

1. Upon your initial login to the SterlingONE platform, or if you have reset your password, you will be prompted to change your temporary password to a permanent one.
2. Complete required fields marked with an asterisk.
3. Click Save.

**Note:** After you have changed your password, click **Dashboard** to access your main view.

The screenshot displays the SterlingONE user interface. The top navigation bar includes the SterlingONE logo, the text 'SterlingONE™', and links for 'Admin', 'Screening Forms', 'Help & Resources', and 'Demo'. A left-hand navigation menu is visible, with 'Dashboard' highlighted in a red box. The main content area is titled 'Change Password' and contains the following text: 'Your new password must be at least 8 characters and be different from your last 10 passwords. It must contain at least one letter, one number, and one of the following characters: ! # \$ % - \_ = . +'. Below this text are three input fields labeled 'Old Password \*', 'New Password \*', and 'Confirm New Password \*'. A blue 'Save' button is located at the bottom of the form.

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# Dashboard Experience

The SterlingONE Dashboard allows you to monitor upcoming due dates and tasks for the Form I-9.

# Verified Person: Navigating the Dashboard

- Previous dashboard experience on Verified Person:

The dashboard features a top navigation bar with links for Home, Ordering, Reports, Docs & Forms, Admin, and Logout. A search bar is located on the right, with the user name 'Vp / Acarter1' displayed. The main content area is divided into several widgets:

- Order By SSN:** Includes fields for SSN, Package (set to 'Laura Package'), and FCRA Purpose (set to 'Employment by Hire or Contract'). A 'Submit' button is present.
- Find Orders:** Includes fields for First name, Last name, SSN, Order #, Billing Identifier 1, and Billing Identifier 2. A 'Show Orders' button is at the bottom, with the text 'find orders - All accounts' below it.
- I-9 Management:** Contains links for 'Create New I-9', 'I-9 Status (1)', 'Print I-9', 'Active (1)', 'Pending (0)', 'E-Verify Action Required (0)', 'Expiring (0)', and 'Reports'.
- Applicant Quick Invite:** Includes fields for First, Middle, and Last names, Applicant E-mail, and a Package dropdown (set to 'TestVTEExclude'). Radio buttons for 'Save to Draft for Review' and 'Process Immediately' are present, along with a 'Send To Applicant' button.
- Criminal TAT by county:** Displays a map of the United States with a legend for TAT (Days) ranging from 0-10 to 11-15.
- Reports:** Shows 'Newly Completed (224)' with a list of names: JOHN PEMBERTON (marked with a red X), John Pemberton, John Pemberton, Deborah Petty, and RAHUL YADAV (marked with a green checkmark). Below the list are links for 'Draft/saved (69)', 'Rescreening required (1532)', 'Pending (0)', 'Completed (3191)', and 'New updates (224)'.
- Docs and Forms:** Contains links for 'Quick Start Guide', 'Web Demo', 'Users Guide', and 'Browser Configuration'.
- Contact:** States 'Your account representative is: Javier Potes' and provides contact information: 'For assistance, please contact me at Phone: 901-260-7887 E-mail: [jpotes@verifiedperson.com](mailto:jpotes@verifiedperson.com)'. It also includes a customer support hotline at 866-380-6100 and an e-mail [support@verifiedperson.com](mailto:support@verifiedperson.com).

# SterlingONE: Navigating the Dashboard Tab

- The SterlingONE Dashboard tab offers a high-level overview of pending screenings, tickets, and onboarding forms.
- My Tasks and Upcoming Due Dates can be used to manage Form I-9 completion within the regulated timeframe.

The screenshot shows the SterlingONE Dashboard interface. At the top, there is a navigation bar with the SterlingONE logo and links for Admin, Screening Forms, and Help & Resources. Below this is a secondary navigation bar with tabs for Dashboard, Applications, Screen, Tasks, Records, and Reporting. The main content area is divided into several sections:

- Find a Candidate:** A search box labeled "Name or ID" with a magnifying glass icon. A callout box points to it with the text: "Search for candidates by Candidate ID or first and last name".
- Quick Launch:** A blue button with a dropdown arrow.
- Recently Viewed:** A list of candidate entries with status indicators (person icon, checkmark, or red X). A callout box points to it with the text: "Displays 10 most recently viewed candidates and reports".
- Recent Activity:** A table showing recent status changes. A callout box points to the header with the text: "Displays recent status changes". The table has columns for status (e.g., New, Pending, Canceled), candidate name, and date. A "view more" link is at the bottom.
- My Tasks:** A section with a "0" count. A callout box points to it with the text: "Lists any tasks that require action by user". Below it, it says "No items to display".
- Upcoming Due Dates:** A table with columns for Task Description, Candidate, Assigned to, Status, and Due. A callout box points to the header with the text: "Provides overview of any tickets, screenings, or onboarding forms with upcoming due dates". The table shows one entry: "Complete and Sign Consent Forms" for "Candidate, Test" assigned to "Test Candidate" with a status of "New" and a due date of "N/A".

# SterlingONE: Navigating the Dashboard Tab

- Using the **Quick Launch** dropdown allows you to create new candidate profiles to launch screenings, tickets, and onboarding forms.
- Alternatively, users without access to candidate profiles may launch reports for new candidates via the packages on the **Dashboard** tab.

The screenshot shows the SterlingONE Dashboard interface. At the top, there is a navigation bar with the SterlingONE logo, the user name 'Julie Harder', and links for 'Admin', 'Screening Forms', and 'Help & Resources'. Below this is a secondary navigation bar with tabs for 'Dashboard', 'Applications', 'Screen', 'Tasks', 'Records', and 'Reporting'. The main content area features several widgets: 'Recent Activity', 'My Tasks', 'Find a Candidate' (with a search bar and 'Quick Launch' dropdown), 'Screening' (with a list of packages), and 'Employment Verification' and 'Reference Check' (with 'Launch' and 'Ticket' buttons). Red callout boxes provide instructions: 'Create a new candidate profile' points to the 'Quick Launch' dropdown; 'Activity widgets can be collapsed or expanded by clicking the grey +/- icon' points to the '+' icon on the 'Recent Activity' widget; 'Click the + sign next to a package name to display the products included' points to the '+' icon next to the 'Test Package' name; and 'Initiate a screening for a new candidate by clicking "Launch" or "Ticket"' points to the 'Launch' and 'Ticket' buttons for the 'Test Package'.

**Dashboard** Applications Screen Tasks Records Reporting

Admin Screening Forms Help & Resources Julie Harder

Find a Candidate  
Name or ID

Quick Launch

Launch Screening  
Launch Onboarding  
New Candidate

**Recent Activity**

**My Tasks** 0

Activity Dates 1

Create a new candidate profile

Activity widgets can be collapsed or expanded by clicking the grey +/- icon

Click the + sign next to a package name to display the products included

**Screening**

Test Package  
Price: \$0.00 plus fees

- SSN Trace
- Criminal County Search (7-Year Address History)
- Multi-State Instant Criminal Check
- DMV Driving Records
- OFAC Check
- Credential Verification
- Reference Check

Employment Verification  
Price: Variable

Reference Check  
Price: Variable

Launch Ticket

Launch Ticket

Launch Ticket

Initiate a screening for a new candidate by clicking "Launch" or "Ticket"

- **Launch:** Allows user to complete all data entry for the candidate report.
- **Ticket:** Allows the user to send an email to the candidate to complete the data entry.

# Creating a Candidate Profile

In SterlingONE, every report submitted for a single candidate will be consolidated under their Candidate Profile.

# SterlingONE: Creating a Candidate Profile

1. To create a new candidate profile, select New Candidate under the Quick Launch dropdown.

Note: Quick Launch is accessible when on any tab (Screen, Records, etc.).

The screenshot displays the SterlingONE dashboard interface. At the top left is the SterlingONE logo. To its right are navigation links for 'Admin', 'Screening Forms', 'Help & Resources', and the user name 'Julie Harder'. Below this is a blue navigation bar with tabs for 'Dashboard', 'Applications', 'Screen', 'Tasks', 'Records', and 'Reporting'. The 'Dashboard' tab is selected and highlighted with a red box. On the left side, there is a 'Find a Candidate' search bar and a 'Quick Launch' dropdown menu. The 'Quick Launch' menu is open, showing options: 'Launch Screening', 'Launch Onboarding', and 'New Candidate'. The 'New Candidate' option is highlighted with a red box. The main content area contains several widgets: 'Recent Activity', 'My Tasks' (0), 'Upcoming Due Dates' (1), and a 'Screening' section. The 'Screening' section lists two items: 'Test Package' (Price: \$0.00 plus fees) and 'Employment Verification' (Price: Variable). Each item has 'Launch' and 'Ticket' buttons.

# SterlingONE: Creating a Candidate Profile

2. Completed all required fields marked with an asterisk and click Create Candidate.

**Note:** Every candidate must have a unique email address, entering an email address already in use will result in an error message directing you to the existing candidate profile.

**Create New Candidate** Close X

First Name*	Middle Name	Last Name*
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email Address\*

Email Address is already in use by Test Candidate.

# eApp Invite vs. Ticket

SterlingONE provides a secure candidate portal to complete sensitive data entry.

# Verified Person: eApp Invite to Candidate

The screenshot displays the Verified Person eApp interface with a navigation bar at the top containing: Home, **Ordering**, Reports, Docs & Forms, Admin, and Logout. A search bar and a user profile button (Vp / Acarter1) are also present.

Two callout boxes highlight specific options:

- Option 1:** Manually begin an order and send to candidate to complete. This points to the **Order By SSN** module, which includes fields for SSN, Package (set to Laura Package), and FCRA Purpose (set to Employment by Hire or Contract), with a Submit button.
- Option 2:** Order via Applicant Quick Invite. This points to the **Applicant Quick Invite** module, which includes fields for First, Middle, and Last names, Applicant E-mail, and Package (set to TestVTEExclude). It also features radio buttons for "Save to Draft for Review" and "Process Immediately", and a Send To Applicant button.

Other visible modules include:

- find Orders:** Fields for First name, Last name, SSN, Order #, and Billing Identifier 1 & 2, with a Show Orders button.
- I-9 Management:** Links for Create New I-9, I-9 Status (1), Print I-9, Active (1), Pending (0), E-Verify Action Required (0), Expiring (0), and Reports.
- Criminal TAT by county:** A map of the United States showing TAT by county.
- Reports:** A list of newly completed orders (224) for JOHN PEMBERTON (4 entries) and RAHUL YADAV (1 entry), along with Draft/saved (69), Rescreening required (1532), Pending (0), Completed (3191), and New updates (224).
- Docs and Forms:** Links for Quick Start Guide, Web Demo, Users Guide, and Browser Configuration.
- Contact:** Information for account representative Javier Potes, including phone (901-260-7887) and email (jpotes@verifiedperson.com), and customer support contact info (866-380-6100 or support@verifiedperson.com).

# Verified Person: eApp Invite to Candidate

- When an eApp invitation is sent from Verified Person, the candidate receives an email with a link to begin the process.
- Any person can access the link, there is no security preventing someone who is not your candidate to access the system.

The screenshot shows an email client interface. At the top, there is a toolbar with icons for back, forward, search, delete, and a 'More' dropdown. Below the toolbar, the email title is 'Employment Background Check' with an 'Inbox x' label. The sender is 'customerservices@verifiedperson.com' and the recipient is 'to'. The email content includes a welcome message, a request to click a link to complete an employment screen and sign an electronic consent form, and a phone number: 866-380-6100. The link provided is: [https://v3.vpassure.com/cgi-bin/pub/collect\\_information?guikey=9yzGb0EsTeJSoXJpmMO#PZ1z5Y6Q7Dl5498011](https://v3.vpassure.com/cgi-bin/pub/collect_information?guikey=9yzGb0EsTeJSoXJpmMO#PZ1z5Y6Q7Dl5498011). At the bottom of the email, there is a reply box with the text 'Click here to Reply or Forward'. In the bottom left corner of the email client, it shows '0 GB (0%) of 15 GB used' and a 'Manage' link. In the bottom right corner, there are links for 'Terms - Privacy'.

# Verified Person: eApp Invite to Candidate

- The candidate is taken to a webpage to complete the required data entry, provide authorization to perform the check, and sign an electronic consent form authorizing the release of personal information.
  1. Instruction Page
  2. Candidate Profile Information
  3. Verification Information (if included)
  4. Authorize Check
  5. Sign Disclosure and Authorization Form

**Sign the documents you reviewed**

I wish to receive a copy of the consumer investigative report.

- on a tablet or phone, use your finger
- on a computer, use your mouse (press and hold the left button while moving the mouse):

After signing, you must click below to save your signature and authorize the search.

**It is recommended that you close this window, once you have authorized your search:**

# SterlingONE: Generate a Ticket

- Similar to the eApp Invite on Verified Person, SterlingONE offers a Ticket feature.
  - The SterlingONE platform includes a secure candidate portal for the completion of electronic forms.
1. Within your newly created candidate profile, click **Add Screening**.

 **Test Candidate** Edit Profile | Save to PDF | Print Report

<b>Candidate ID</b>	31767202	<b>Alternate Names</b>	None on File
<b>Date Added</b>	Mar 14 2017 10:52 am	<b>Email Address</b>	testcandidate@test.com
<b>Date Last Modified</b>	N/A	<b>Primary Phone Number</b>	Not on File
<b>Social Security Number</b>	Not on File	<b>Address</b>	Not on File
<b>Date of Birth</b>	Not on File		
<b>Start Date</b>	Not on File		
<b>Termination Date</b>	Not on File		

 **Application History** Add Application

Candidate has no application history

 **Ticket History**

Candidate has no ticket history

 **Screening History** Add Screening

Candidate has no screening history

# SterlingONE: Generate a Ticket

2. To initiate a ticket, click the Ticket button next to the desired package.

**Add Screening** Close X

**-** Test Package Launch **Ticket**

- SSN Trace
- Criminal County Search (7-Year Address History)
- Multi-State Instant Criminal Check
- DMV Driving Records
- OFAC Check
- Credential Verification
- Reference Check

**+** Employment Verification Launch Ticket  
Price: Variable

**+** Reference Check Launch Ticket  
Price: Variable

**+** Education Verification Launch Ticket  
Price: Variable

**Click the + sign next to a package name to display the products included**

# SterlingONE: Generate a Ticket

## Test Package

**User Certification and Candidate Authorization**  
You must indicate your agreement to the statement below by checking the box.

I understand my obligations and am in compliance with all applicable laws pertaining to Consumer Reports / Consumer Investigative Reports as defined in the [Fair Credit Reporting Act](#) as amended.

**Generate a Candidate Ticket** \* Indicates required field  
To generate a ticket, please complete the form below.

First Name\* Middle Name Last Name\* Suffix

Email Address\*

**Disclosure and Authorization Options**

Send electronic disclosure and authorization forms to this individual at the email given below. I certify that: 1) the disclosure and authorization forms have been reviewed by my company and legal counsel and they satisfy all Fair Credit Reporting Act and other legal requirements, including a clear and conspicuous disclosure in a document that consists solely of the disclosure; 2) my order should not be processed before this written disclosure has been made to the consumer and his or her authorization obtained in writing; 3) the report will not be used in violation of any applicable federal or state equal employment opportunity law or regulation, and its use will comply with all applicable laws; and 4) I understand my obligations, have complied with, and will comply with all applicable laws pertaining to Consumer Reports/Investigative Consumer Reports as defined in the [Fair Credit Reporting Act](#) as amended.

OR

I have provided the individual a disclosure and received the individual's written authorization for the report. I certify that: 1) a clear and conspicuous disclosure was made to the consumer in a document consisting solely of the disclosure 2) the disclosure satisfied all Fair Credit Reporting Act and other legal requirements; 3) the report will not be used in violation of any applicable federal or state equal employment opportunity law or regulation, and its use will comply with all applicable laws; and 4) I understand my obligations, have complied with, and will comply with all applicable laws pertaining to Consumer Reports/Investigative Consumer Reports as defined in the [Fair Credit Reporting Act](#) as amended.

**Order Tracking**

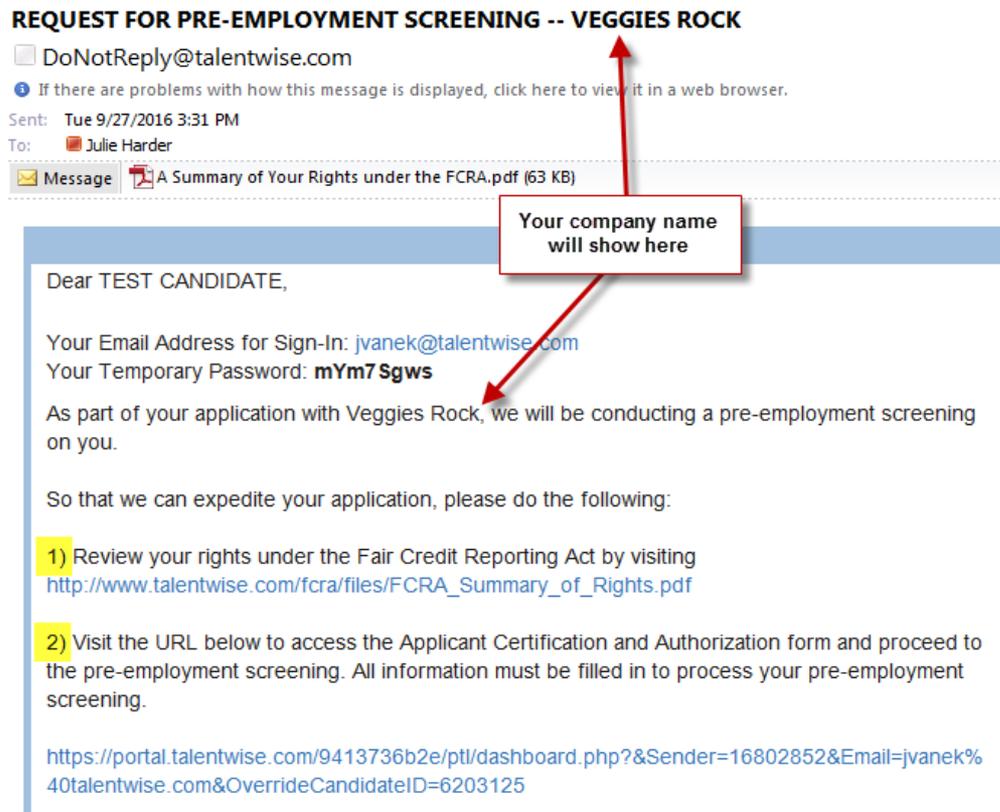
Reference Code(s)  
Reference Code\*  
Select

**Generate Ticket**

3. Complete all required fields marked with an asterisk.
4. Click Generate Ticket.

# SterlingONE: Generate a Ticket (Candidate Experience)

- Once a Ticket has been generated, the SterlingONE system will send an email to the candidate inviting them to complete the data entry process.
- The email will contain: 1) A link to a PDF copy of their summary of rights under the FCRA. 2) A URL to access the Candidate Portal to sign their Electronic Disclosure & Authorization (if sent) and complete all data entry.



# SterlingONE: Generate a Ticket (Candidate Experience)

- The candidate will be prompted to log in to a secure candidate portal, verify their DOB and last four of SSN, and change their temporary password.
- After accessing the candidate portal, the candidate will be prompted to launch any assigned tasks; including data entry on a ticket or onboarding form, such as a Form I-9.

**i You have a new task!**

*Click the Launch Task button to begin. Each time you have a new task, it will appear in your "My Tasks" inbox. You also have a "My Tasks" dropdown in the upper right corner that can be accessed from anywhere in your portal.*

[Close this Note](#)

## My Inbox

Task	Due Date	Status	
Complete Information for Background Screening	N/A	NEW	<a href="#">Launch Task</a>

# SterlingONE: Generate a Ticket (Candidate Experience)

- If “Send electronic disclosure..” was selected when creating the ticket, the candidate will be directed to a Disclosure and Authorization form (EDA); this form will generate an eSignature for the release. For your convenience, completed electronic release forms are stored in your account.

> Complete and Sign Consent Forms

### CONSENT AND NOTICE REGARDING ELECTRONIC SIGNATURE

> Complete and Sign Consent Forms

### DISCLOSURE FOR BACKGROUND CHECK

> Complete and Sign Consent Forms

### NOTICE REGARDING BACKGROUND CHECKS PER CALIFORNIA LAW

Veggies Rock (the “Company”) intends to obtain information about you for employment screening purposes from a consumer reporting agency. Thus, you can expect to be the subject of “investigative consumer reports” and “consumer credit reports” obtained for employment purposes.

> Complete and Sign Consent Forms

### AUTHORIZATION FOR BACKGROUND CHECK

I have carefully read and understand the separate background check disclosure document and the below authorization form. I have received a copy of the “Summary of Your Rights Under the Fair Credit Reporting Act” and any applicable state or local notices of rights provided with these documents. I have had the opportunity to review my rights. By my signature below, I consent to the preparation of background reports by TalentWise, and to the release of such reports to the Company and its designated representatives for the purpose of assisting the Company in making a determination as to my eligibility for employment, promotion, retention, contract assignment or for other lawful purposes.

I understand that, to the extent allowed by law, information contained in my job application or otherwise disclosed to the Company by me before or during my employment or contract assignment, if any, may be utilized for the purpose of obtaining such consumer reports and/or investigative reports.

#### A SUMMARY OF YOUR RIGHTS UNDER THE FAIR CREDIT REPORTING ACT

Para información en español, visite [www.consumerfinance.gov/learnmore](http://www.consumerfinance.gov/learnmore) o escriba a la Consumer Financial Protection Bureau, 1700 G Street N.W., Washington, DC 20552.

The federal Fair Credit Reporting Act (FCRA) promotes the accuracy, fairness, and privacy of information in the files of consumer reporting agencies. There are many types of consumer reporting agencies, including credit bureaus and specialty agencies (such as agencies that sell information about check writing histories, medical records, and rental history records). Here is a summary of your major rights under the FCRA. For more information, including information about additional rights, go to [www.consumerfinance.gov/learnmore](http://www.consumerfinance.gov/learnmore) or write to: Consumer Financial Protection Bureau, 1700 G Street N.W., Washington, DC 20552.

#### ADDITIONAL STATE LAW NOTICES

**CALIFORNIA, MASSACHUSETTS, MINNESOTA, NEW JERSEY, AND OKLAHOMA** applicants or residents: You have a right to request a free copy of your report.

**CALIFORNIA:** Pursuant to section 1786.22 of the California Civil Code, you may contact TalentWise during normal business hours (9am to 5pm PST, Monday through Friday) to obtain and review all information in your file. You may obtain such information by appearing in person at TalentWise’s offices, during normal business hours and upon reasonable notice, and upon submitting proper identification and paying the cost of duplication services. You may be accompanied by one other person, provided that person furnishes proper identification. You may also obtain a copy of your file by certified mail, if you have previously provided identification in a written request that your file be sent to you or a third party identified by you. You may also obtain a summary of your file by telephone, upon providing proper identification. TalentWise has

The following information is being collected to conduct the background check. It is kept safe and secure and will not be used for any other purpose.

### Personal Information

First Name \*  Full Middle Name  Last Name \*

Date of Birth \*    Email Address \*

Social Security Number \*

### Address

Country/Region \*

### Electronic Signature

Confirm your name and signature:

[Update Signature](#)

Option 1: Click on one of the signatures below

Option 2: Draw your signature

# SterlingONE: Generate a Ticket (Candidate Experience)

- After signing the EDA, the candidate will immediately be directed to complete the Candidate Profile page.

## User Certification and Candidate Authorization

You must indicate your agreement to the statement below by checking the box.

I have given signed authorization to this organization to conduct this screening. I understand my rights under the Fair Credit Reporting Act.

The candidate must check this box to authorize the organization to conduct the screening

## Candidate Profile

\* Indicates required field

Information in this section is used for all searches.

First Name*	Middle Name*	Last Name*	Suffix
<input type="text" value="Jonathan"/>	<input type="text"/>	<input type="text" value="Smith"/>	<input type="text"/>
<input type="checkbox"/> No Middle Name			
Alternate First Name	Alternate/Maiden Last Name		
<input type="text"/>	<input type="text"/>		
Social Security Number*	Date of Birth*		
<input type="text"/>	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>		
Phone Number*	Email Address*		
<input type="text"/>	nwilborn@talentwise.com		
Current Address*	City	State/Territory	Zip Code*
<input type="text"/>	<input type="text"/>	Select State/Territory <input type="text"/>	<input type="text"/>

### Previous Residence (optional)

If providing a previous residence, you must include either (1) city and state or (2) zip code

City	State/Territory	Zip Code
<input type="text"/>	Select State/Territory <input type="text"/>	<input type="text"/>

Check here if you would like a copy of the final report sent to you by email

The candidate may request a copy of the final report via email

Continue

## Additional Required Information

### Employment Verification

\* Indicates required field

Only one entry per employer, including most recent job title and full duration of employment.

EMPLOYMENT VERIFICATION

Employer Name*	Phone Number*
<input type="text"/>	<input type="text"/>
City*	State/Territory*
<input type="text"/>	Select State/Territory <input type="text"/>
Job Title*	Reason for Leaving*
<input type="text"/>	Select <input type="text"/>
Start Date*	End Date*
Month <input type="text"/> Year <input type="text"/>	Month <input type="text"/> Year <input type="text"/>
Additional Information	
<input type="text"/>	

The candidate will be prompted to provide any other needed data as required for the chosen screening package

Name While Employed  Same as Current

First Name	Last Name
<input type="text"/>	<input type="text"/>

+ Add Employment Verification

### Education Verification

\* Indicates required field

Enter your school information below.

EDUCATION VERIFICATION

Certification/Degree*	Field of Study/Major*
Select <input type="text"/>	<input type="text"/>
School Name*	
<input type="text"/>	
School City*	School State/Territory*
<input type="text"/>	Select State/Territory <input type="text"/>
Did You Graduate?*	
Select <input type="text"/>	
Name While Attending School <input type="checkbox"/> Same as Current	
First Name*	Last Name*
<input type="text"/>	<input type="text"/>

+ Add Education Verification

Continue

# SterlingONE: Generate a Ticket (Candidate Experience)

- Your candidate will be asked to review the provided information and may edit any incorrect fields.
- After clicking **Submit**, the candidate will receive a ticket confirmation number. This ticket ID number matches the ticket number found on your SterlingONE Screen tab.

## Review Information

Please review the package details below. To submit your screening, click the **Submit** button. To change any information, use the **edit** links.

**Candidate Profile**  [edit](#)

Name:	Jonathan Smith
Social Security Number:	xxx-xx-6789
Date of Birth:	2/14/1985
Phone Number:	(425) 239-1234
Email Address:	nwilborn@talentwise.com
Address:	123 Test Everett, WA 98201
Previous Residence:	Not Provided

[Submit](#)

## Thank you!

Thank you for completing the background check form. You may be contacted by SterlingONE Customer Support if there are issues processing your report.

Your ticket ID is 2259926.

If you have any questions regarding your order, please contact SterlingONE Customer Support at 1.866.338.6739.

[Return to Dashboard](#)

[Sign Out](#)

# Basic Ordering vs. Launch

# Verified Person: Basic Order

- From the main view in Verified Person, click **Ordering**, and select **Basic Order**:
  - Choose Package
  - Enter candidate information
  - Enter request information (Verifications, single criminal jurisdictions, etc.)
  - Confirm authorization has been received from the candidate
  - Click **Submit Now**

The screenshot displays the Verified Person web application interface. The top navigation bar includes links for Home, Ordering, Reports, Docs & Forms, Admin, and Logout. A search bar and a user profile indicator (Vp / Acarter1) are also present. The main content area is divided into several sections:

- Ordering:** A dropdown menu is open, showing options: Basic Order (All+5), Order by SSN, Form I-9 Ordering, Batch MVR Order, Quick MVR Order, SSN, Batch Order, I-9 Ordering, and TestVTEExclude. A red box highlights the "Ordering" menu item with the text "Click 'Ordering' and select 'Basic Order'".
- Orders:** A form for entering candidate information, including fields for First name, Last name, SSN, Order #, Billing Identifier 1, and Billing Identifier 2. A "Show Orders" button is located below the form.
- I-9 Management:** A section with links for "Create New I-9", "I-9 Status (1)", "Print I-9", "Active (1)", "Pending (0)", "E-Verify Action Required (0)", "Expiring (0)", and "Reports".
- Applicant Quick Invite:** A form for entering applicant information, including fields for First, Middle, and Last names, Applicant, and E-mail. A "Package" dropdown menu is set to "TestVTEExclude". There are radio buttons for "Save to Draft for Review" and "Process Immediately", and a "Send To Applicant" button.
- Criminal TAT by county:** A map of the United States showing criminal turnaround times by county.
- Reports:** A section titled "Newly Completed (224)" listing candidates: JOHN PEMBERTON (with a red X), John Pemberton (with a red X), John Pemberton (with a red X), Deborah Petty (with a red X), and RAHUL YADAV (with a green checkmark). Below this, there are links for "Draft/saved (69)", "Rescreening required (1532)", "Pending (0)", "Completed (3191)", and "New updates (224)".
- Docs and Forms:** A section with links for "Quick Start Guide", "Web Demo", "Users Guide", and "Browser Configuration".
- Contact:** A section providing contact information for the account representative, Javier Potes, including phone number (901-260-7887) and email (jpotes@verifiedperson.com). It also includes a customer support hotline (866-380-6100) and email (support@verifiedperson.com).

# SterlingONE: Launch a Screening Order

1. To submit an order in SterlingONE, access your newly created candidate profile, and click **Add Screening**.

**Note:** You may search for existing candidate profiles using the **Find a Candidate** field or via the **Records** tab.

 **Test Candidate** [Edit Profile](#) | [Save to PDF](#) | [Print Report](#)

---

<b>Candidate ID</b>	31767202	<b>Alternate Names</b>	<i>None on File</i>
<b>Date Added</b>	Mar 14 2017 10:52 am	<b>Email Address</b>	testcandidate@test.com
<b>Date Last Modified</b>	<i>N/A</i>	<b>Primary Phone Number</b>	<i>Not on File</i>
<b>Social Security Number</b>	<i>Not on File</i>	<b>Address</b>	<i>Not on File</i>
<b>Date of Birth</b>	<i>Not on File</i>		
<b>Start Date</b>	<i>Not on File</i>		
<b>Termination Date</b>	<i>Not on File</i>		

---

 **Application History** [Add Application](#)

*Candidate has no application history*

---

 **Ticket History**

*Candidate has no ticket history*

---

 **Screening History** [Add Screening](#)

*Candidate has no screening history*

# SterlingONE: Launch a Screening Order

2. Click the **Launch** button next to the desired package.

**Note:** If you do not see a needed package, your dedicated support representative can assist with having those created.

**Add Screening** Close X

<b>+ Test Package</b> Price: \$0.00 plus fees	<b>Launch</b>	<b>Ticket</b>
<b>+ Employment Verification</b> Price: Variable	<b>Launch</b>	<b>Ticket</b>
<b>+ Reference Check</b> Price: Variable	<b>Launch</b>	<b>Ticket</b>
<b>+ Education Verification</b> Price: Variable	<b>Launch</b>	<b>Ticket</b>

**Additional products may be submitted for a candidate by launching a new report using available a la carte packages**

# SterlingONE: Launch a Screening Order

## Test Package

### User Certification and Candidate Authorization

You must indicate your agreement to the statement below by checking one of these boxes.

- I have provided the individual a disclosure and received the individual's written authorization for the report. I certify that: 1) a clear and conspicuous disclosure was made to the consumer in a document consisting solely of the disclosure 2) the disclosure satisfied all Fair Credit Reporting Act and other legal requirements; 3) the report will not be used in violation of any applicable federal or state equal employment opportunity law or regulation, and its use will comply with all applicable laws; and 4) I understand my obligations, have complied with, and will comply with all applicable laws pertaining to Consumer Reports/Investigative Consumer Reports as defined in the Fair Credit Reporting Act as amended.
- OR
- Send electronic disclosure and authorization forms to this individual at the email given by disclosure and authorization forms have been reviewed by my company and legal counsel: 1) the disclosure consists solely of the disclosure; 2) my order should not be processed before this written disclosure is obtained in writing; 3) the report will not be used in violation of any applicable federal or state equal employment opportunity law or regulation, and its use will comply with all applicable laws pertaining to Consumer Reports/Investigative Consumer Reports as defined in the Fair Credit Reporting Act as amended.

### Candidate Profile

Information in this section is used for all searches.

<b>First Name*</b>	<b>Middle Name*</b>	<b>Last Name*</b>	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> No Middle Name			
Alternate First Name	Alternate/Maiden Last Name		
<input type="text"/>	<input type="text"/>		
<b>Social Security Number*</b>	<b>Date of Birth*</b>		
<input type="text"/>	Month <input type="text"/>	Day <input type="text"/>	Year <input type="text"/>
<b>Phone Number*</b>	<b>Email Address*</b>		
<input type="text"/>	<input type="text"/>		
<b>Current Address*</b>	City	State/Territory	
<input type="text"/>	<input type="text"/>	Select State/Territory <input type="text"/>	
<b>Previous Residence (optional)</b> If providing a previous residence, you must include either (1) city and state or (2) zip code			
City	State/Territory	Zip Code	
<input type="text"/>	Select State/Territory <input type="text"/>	<input type="text"/>	

- Complete all data, as required by the screening package. An asterisk indicates a required field. Click Continue.

### Additional Required Information

Use the checkboxes to disable/enable a search. Disabling searches does not necessarily reduce the package price.

#### DMV Driving Records

\* Indicates required field

Enter the candidate's information below.

**State/Territory\***

**Driver's License\***

#### Credential Verification

\* Indicates required field

Enter the candidate's credential information below.

**Professional License/Certification Type\***

**License Status\***

**Professional License/ID #\***

**State\***

#### Reference Check

\* Indicates required field

Enter the reference contact information below.

**Name of Reference\***

**Phone Number\***

**Email Address\***

Company Name

Relationship to Candidate

# SterlingONE: Launch a Screening Order

4. Based on your candidate's Social Security Number (SSN) Trace history, SterlingONE will provide a list of alternate names (AKAs) that are associated to the candidate SSN. You will also be provided with an SSN Trace Result. **Note: Additional charges may be applied for AKA names submitted.**

### Select AKAs to Search

Your package includes AKA searches at an additional cost of \$0.00 (plus fees) per AKA.  
Total costs will be calculated and shown on the following page. You will be able to make changes before submitting your search for purchase.  
Please check the boxes for the AKAs you wish to search, then click the **Continue** button below.

Primary Name	<input checked="" type="checkbox"/> Jonathan Smith
AKAs Found for This SSN	<input type="checkbox"/> JOHN SMITH

**Check the box next to the AKA name to include them in the screening**

# SterlingONE: Launch a Screening Order - SSN Trace Results

## Common SSN Trace Results:

### **Complete: Full name matches SSN:**

- This requires no further action, the Social Security Number matches in the SterlingONE system and to the Candidate.

### **Complete: First name matches SSN:**

- This result is noting that there are different last names associated with the candidates Social Security Number versus the last name provided. This requires no further action, you may proceed and order an alias if needed.

### **Complete: Last name matches SSN:**

- This result is noting that there are different first names associated with the candidates Social Security Number versus the first name provided. This requires no further action, you may proceed and order an alias if needed. This is most common if your candidate abbreviates their first name.

### **Complete: Valid SSN, no record found candidate is under 23:**

- This requires no further action, the candidate is under 23 with no address history associated with the Social Security Number.

### **Complete: Valid SSN, no record found:**

- This requires no further action, the candidate does not have address history associated to the Social Security Number.

### **Complete: Identifiers found do not match candidate data:**

- Name mismatch against SSN: Check the candidate's Social Security card. If the information entered is correct, you may bypass the error by checking the provided box and confirming you authorize Sterling Talent Solutions to proceed.

### **Complete: SSN provided does not comply with SSA formatting guidelines:**

- The candidate's Social Security Number does not comply with SSA formatting guidelines and is not valid, please call your dedicated support team if assistance is needed.

# SterlingONE: Launch a Screening Order - Review Your Order

5. Next you will be prompted to review your order. Here you may make changes before submitting the screening, if needed.

Click **Purchase** to complete your order.

## Review Information

<b>Package</b>	7 Yr Criminal
----------------	---------------

Please review the package details below. To submit your purchase, click the **Purchase** button. To change any information, use the **edit** links.

<b>Candidate Profile</b>	 <a href="#">edit</a>
--------------------------	--------------------------------------------------------------------------------------------------------

Click the green pencil(s) to edit any information

Name:	Jonathan Smith
	 <b>Complete:</b> Full name matches SSN.
Social Security Number:	xxx-xx-3456
Date of Birth:	2/14/1975
Phone Number:	(425) 259-1234
Email Address:	test@tester.com
Address:	123 Test St Everett, WA 98201
Previous Residence:	Not Provided
Reference Code:	16

<b>AKAs to Search</b>	 <a href="#">add akas</a>
-----------------------	------------------------------------------------------------------------------------------------------------

You have selected no AKAs to search

<b>Criminal County Search (7-Year Address History)</b>
Based on address history, the following searches will be performed on Jonathan Smith:
<ul style="list-style-type: none"><li>Statewide — Washington</li><li>On-Premise County — Fairfax County, VA</li></ul>

**Purchase**

# SterlingONE: Launch a Screening Order - Confirmation Page

6. After purchasing, a confirmation page is displayed. This page will provide a Report ID and notification of any additional required action.

## Confirmation

Candidate Jonathan Smith (6203125)

[Go to Candidate View](#)

Package DOT Verification

[View Report in Progress](#)

Date Submitted December 15, 2016

### Your Report is now processing.

All email regarding this order will be sent to [julie7vanek@gmail.com](mailto:julie7vanek@gmail.com) and [jharder@talentwise.com](mailto:jharder@talentwise.com). To add or change addresses, or to turn off notifications, visit your [Preferences](#) page. If you have any questions regarding this order, please call Customer Support at 1.866.338.6739 and reference **Report ID 99133376**.

## IMPORTANT: Additional Action Required

PLEASE NOTE: If your account is configured to send special releases to the applicant, please disregard this notice.

Certain components of your request require additional action on your part before they can be processed:

- FMCSA 3 Year Drug & Alcohol Verification — Please instruct the applicant to complete only the first section of this release. The remaining sections will be completed by the previous employer. [Sample Form](#)

Please have your candidate sign all required forms and return them to you. Forms may be uploaded electronically or faxed to SterlingONE (Attention: Authorizations) at 1.877.974.6150. When faxing, be sure to reference **Report ID 99133376** on your cover sheet. Keep originals for your records.

If you don't have an electronic version of the form available to you now, you may upload from your [Screen](#) tab by selecting **Attach Files** from the dropdown menu.

If the package includes any products that require a signed release to process, you will be prompted to upload the release form here

[Upload File for Dot Test](#)

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# Viewing Reports

# Verified Person: Viewing Reports

- To view pending and completed reports in Verified Person, click Reports.

The screenshot displays the Verified Person web application interface. At the top, a navigation bar includes links for Home, Ordering, Reports, Docs & Forms, Admin, and Logout. A search bar and a user profile indicator (Vp / Acarter1) are also present. A red arrow points to the 'Reports' link in the navigation bar, with a callout box that says 'Click "Reports"'. Below the navigation bar, the main content area is divided into several panels:

- Order By SSN:** A form with fields for SSN, Package (TestVTEclude), and FCRA Purpose (Employment by Hire or Contract), with a Submit button.
- Find Orders:** A form with fields for First name, Last name, SSN, Order #, Billing Identifier 1, and Billing Identifier 2, with a Show Orders button.
- I-9 Management:** A panel with links for Create New I-9, I-9 Status (1), Print I-9, Active (1), Pending (0), E-Verify Action Required (0), Expiring (0), and Reports.
- Applicant Quick Invite:** A form with fields for First, Middle, Last, Applicant E-mail, and Package (TestVTEclude), with radio buttons for Save to Draft for Review and Process Immediately, and a Send To Applicant button.
- Criminal TAT by county:** A map of the United States showing criminal TAT by county (last 90 days).
- Reports:** A panel showing a list of reports under 'Newly Completed (224)'. The list includes: JOHN PEMBERTON (marked with a red X), John Pemberton (marked with a red X), John Pemberton (marked with a red X), Deborah Petty (marked with a red X), and RAHUL YADAV (marked with a green checkmark). Below the list are links for Draft/saved (69), Rescreening required (1532), Pending (0), Completed (3191), and New updates (224).
- Docs and Forms:** A panel with links for Quick Start Guide, Web Demo, Users Guide, and Browser Configuration.
- Contact:** A panel with contact information for Javier Potes, including phone number (901-260-7887) and email (jpotes@verifiedperson.com). It also provides a customer support hotline (866-380-6100) and email (support@verifiedperson.com).

# Verified Person: Viewing Reports

Reports Filter/Search Viewing Options

Report list - click on a name to view the report  Page 1 of 1, Row: 9 << 1 >>  Go

Name	SSN	Status	Report Progress	New Update	Last Update	Order Date	User ID	Billing Identifier 1	Billing Identifier 2	Billing Identifier 3
<input type="checkbox"/>  COMPSON, QUENTIN	123-45-6789	PENDING		YES	02/05/2016	02/05/2016	acarter1-			
<input type="checkbox"/>  GATZ, JAMES		COMPLETE			01/28/2016	01/28/2016	acarter1-			
<input type="checkbox"/>  DAVENPORT, LUC		COMPLETE			01/28/2016	01/28/2016	acarter1-			
<input type="checkbox"/>  BARNES, JAKE	123-54-6789	COMPLETE			01/28/2016	01/28/2016	acarter1-			
<input type="checkbox"/>  TAGGART, DAGNEY	123-45-9876	COMPLETE			10/15/2015	10/15/2015	acarter1-			
<input type="checkbox"/>  SMILEY, GEORGE	111-11-1111	COMPLETE		YES	10/15/2015	10/15/2015	acarter1-			
<input type="checkbox"/>  MORAN, SEBASTIAN				YES	10/15/2015	10/15/2015	acarter1-			
<input type="checkbox"/>  FINCH, ATTICUS					10/15/2015	10/15/2015	acarter1-			
<input type="checkbox"/>  MONTAG, GUY	012-34-5678	NOT ORDERED			10/15/2015	10/15/2015	acarter1-			

Action for Selected Reports

[Customer Service Inquiry](#)

[View/Print](#)

[Archive](#)

[Set Status to Reviewed](#)

[Un-review](#)

[Set employment termination date](#)

[Print I9 Document](#)

Click on the plus sign to view report components and their current status

Click on the candidate Name to view report details

# SterlingONE: Navigating the Screen Tab - Screenings

- In SterlingONE, all Pending and Completed reports are stored within your Screen tab > Screening sub-tab.
- SterlingONE reports are available for the lifetime of the account.
- By default, email notifications are sent to the requestor when a candidate report is complete.

**Dashboard** Applications **Screen** Tasks Records Reporting

Screening Tickets

**Find a Candidate**  
Name or ID

**Recently Viewed**

- Test, Attachment
- Upload, Test
- Upload, Test
- Candidate, Test
- Candidate, Test
- Smith, Jonathan

**Announcements**  
Announcement: On August 25, 2016, the Office of Management and Budget (OMB), issued its approval of the final version of the new Form I-9. What does this mean for you? Click here to learn more about USCIS and employer timelines for implementing the new Form I-9.

**Search Screening**  Show me new and updated reports only

Select Saved Search...

Report ID  Last Name  First Name  SSN

**Advanced Search Options**

Status  Result  Tag  Start Date (m/d/y)  End Date (m/d/y)

Altered results only

Package  Searched by Account  Codes  Title

Position

**Screening**

Viewing Page: 1 | Items per Page: 10 30

Name	Package	Date Set	Status	Result	Action
Applicant, Test (95333446)	Verification Package - Coca Cola Demo	Aug 29 10:15 am By Coca Cola Demo	Complete	Meets Criteria	Action...
Candidate, Demo (9533357)	Verification Package - Coca Cola Demo	Aug 29 10:15 am By Coca Cola Demo	Complete	Does Not Meet Criteria - Review	Action...
Julie Test	Applicant Report Contents	Complete	Status	Clear	Action...
1 Education Verification School: Everett High School		Complete	Verified	Clear	Action...
		Complete		Clear	Action...
		Complete		Clear	Action...

Viewing Page: 1 | Items per Page: 10 30

# SterlingONE: Viewing a Candidate Report

- To locate a specific candidate report in SterlingONE, search for the report by Report ID, Last Name, First Name, or SSN. After locating the candidate report, click the magnifying glass icon or select **View Report** under the **Action** drop-down to view it.

**Note:** You may also search for existing candidate profiles using the **Find a Candidate** field or via the **Records** tab. Candidate profiles house all reports submitted for a single candidate.

The screenshot displays the SterlingONE interface for viewing a candidate report. The navigation bar at the top includes 'Dashboard', 'Applications', 'Screening' (highlighted), 'Tasks', 'Records', and 'Reporting'. Below the navigation bar, the 'Screening' section is active, showing a search form and a table of results.

**Search Screening**  Show me new and updated reports only

Select Saved Search... [Save New Search](#) [Update Saved Search](#)

Report ID:  Last Name:  First Name:  SSN:

[Advanced Search Options](#) [Search](#) [Clear All](#)

**Screening 1 - 2 of 2**

Name	Package	Date Searched	Status	Result
<input type="checkbox"/> Candidate, Test (94686297)	United Demo - Verifications	Aug 9 6:53 am By Julie Harder	<b>Complete</b> Aug 9 6:55 am	Clear
<input type="checkbox"/> Test, Julie (92779729)	Education Verification	Jun 7 2:44 pm By Julie Harder	<b>Complete</b> Jun 7 2:46 pm	Clear

Print | Email

**Screening 1 - 2 of 2**

Viewing Page: 1 | Items per Page: 10 30

**To view a candidate report, click the magnifying glass icon, or select "View Report" under the Action dropdown**

# SterlingONE: Viewing a Candidate Report

- You will be taken to the Report View page.
- The Report View header offers a high-level overview of the report's contents.

## Test Candidate Candidate View

**Applicant Report: Test Candidate**

<b>Requested by</b>	Verifications Demo Veggies Rock (425) 259-1234	<b>Report Status</b>	Complete
<b>Package Title</b>	United Demo - Verifications	<b>Request Submitted</b>	Aug 9, 2016 6:53 am
		<b>Report Completed</b>	Aug 9, 2016 6:55 am
		<b>Completion Time</b>	2 minutes

---

<b>Applicant ID</b>	94686297	<b>Address</b>	123 Test Norcross, GA 30003
<b>Applicant Name</b>	Test Candidate	<b>Reference Code</b>	Seattle → Reception
<b>Social Security Number</b>	xxx-xx-6789		
<b>Date of Birth</b>	1/2/1995		

---

Applicant Report Contents		Complete	Status
1	<a href="#">Employment Verification</a> Employer: Test Employer	✓	Verified

**Header lists submission details and overall status**

**Sub-header lists candidate-specific data**

**Status of individual report contents**

Select an Action...  
Select an Action...  
Open PDF  
Print Report  
Email Report

**Action drop-down offers report-level options**

# SterlingONE: Viewing a Candidate Report

- Further down the Report View page, additional details are provided for each individual report component.

**1 SSN Trace**

SSN	xxx-xx-6888
State Issued	VIRGINIA
Primary Name Searched	TEST TESTER
	✔ No Data: Valid SSN, no record found.
Possible Alternative Names	No possible alternative names were found for this candidate.

**2 Criminal County Search (7-Year Address History)** Jurisdiction: Washington - Statewide

Search Type	FELONY AND MISDEMEANOR
Jurisdiction Searched	WASHINGTON - STATEWIDE
Result	The following counties are searched for this King <b>Alert</b> → 1 record found

**Record 1 of 1**

Court	SUPERIOR
Case Number	B5049314381XT
File Date	2005-08-15
Offense Type	CRIMINAL NON-TRAFFIC
Offense Description	CH1 - THEFT-1 OVER \$1500 (NOT FIREARM) CH2 - FORGERY
Disposition Date	2006-02-22
Disposition	CH1 - 2M JAIL WITH 30 DAYS CONV TO 240H COMM SVC. CH2 - DISMISSED
Subject Identifiers	NAME AND DOB

**3 Multi-State Instant Criminal Check**

Search Description	Using the candidate's name and date of birth, we have searched case, sentencing, disposition, and other criminal-related records for all available jurisdictions in the United States.
--------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

A red Alert will indicate discrepancies or records found

Full details of criminal records are provided

# SterlingONE: Viewing a Candidate Report

- Reports including Verifications (such as Employment, Education, References, and Credentials) will provide both the details as provided by the candidate and the final details as verified by Sterling Talent Solutions.

**1** Employment Verification Employer: Test Employer

**Information Provided**

Employer Name	Test Employer
Location	Everett, WA
Employee Name	Test Candidate
Job Title	Test
Dates Employed	1/2015 – 1/2016
Reason for Leaving	Other

**Information Verified**

Result Verified  
Employer confirms applicant's employment

Employer Name	Test Employer
Location	Everett, WA
Employee Name	Test Candidate
Job Title	Test
Dates Employed	1/2015 – 1/2016
Reason for Leaving	Other

[Status Notes](#) Click "Status Notes" to expand notes from the fulfillment team.

2016-08-09 06:55:19 Agent 4510356

Complete  
Note: Verified test employer with HR

— END OF REPORT —

[Reports History](#)

[Run Another Search on Test Candidate](#) Click "Run Another Search" to submit additional screenings for this candidate

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# SterlingONE: Navigating the Screen Tab - Tickets

- All Pending and Completed tickets are stored within your Screen tab > Tickets sub- tab.
- Ticket history is available for the lifetime of the account.
- Tickets are set by default to expire after 5 business days, with a reminder email notification sent every other business day. The expiration and reminder notification timeframes can be changed per client request. Reminders can also be manually sent via the Action dropdown.
- Tickets can only be resent when in "New" status. Once "Open" Sterling can help you resend.

The screenshot shows the SterlingONE interface. At the top, the navigation bar includes 'Dashboard', 'Applications', 'Screen' (highlighted), 'Tasks', 'Records', and 'Reporting'. Below this, the 'Screening' section has a 'Tickets' sub-tab highlighted. On the left, there is a 'Find a Candidate' search bar and a 'Recently Viewed' list. The main area is titled 'Search Tickets' and contains search filters for Ticket ID, Last Name, First Name, and Email Address. Below these are 'Advanced Search Options' for Status, Start Date, End Date, Sent by Account, Reference Code, and Position. A 'Search' button and 'Clear All' link are present. A table titled 'Tickets 1 - 10 of 24' displays the following data:

Ticket ID	Name	Email Address	Package	Date Generated	Status
2356098	Candidate, Test	ivanek@talentwise.com	Credential Verification	Oct 5 11:03 am By Julie Harder	Filled
2354256	Candidate, Test	ivanek@talentwise.com	United Demo - Verifications	Oct 4 3:58 pm By Julie Harder	Open
2353256	Candidate, Test	demo@tester.com	Employment Verification	Oct 4 12:23 pm By Julie Harder	New
2343192	Ticket, Test	ticket@test.com	Employment Verification	Sep 29 1:12 pm By Veg Test	Canceled

Annotations in the image include:

- A red box around the 'Screen' tab in the navigation bar.
- A red box around the 'Tickets' sub-tab.
- A red box around the 'Advanced Search Options' section with the text: "Click + icon to expand Advanced Search Options. These options can vary based on account configuration."
- A red box around the 'Ticket Status' legend with the following text:
  - **New:** Ticket has been sent but no action has been taken by candidate.
  - **Open:** Candidate has clicked the link to the ticket but has not yet completed the data entry in full.
  - **Filled:** Candidate has completed their ticket and it is awaiting review by Sterling Talent Solutions.
  - **Processing:** Ticket has been reviewed by Sterling Talent Solutions and is now processing.
  - **Expired:** Ticket has expired as candidate did not complete data entry within the client specified time.
  - **Canceled:** The ticket has been canceled.
- A red box around the 'Action...' dropdown menu for the 'New' status ticket, with the text: "Action dropdown allows the ticket to be canceled or resent."

# SterlingONE: Records Tab

# SterlingONE: Navigating the Records Tab

- The Records tab > Candidates sub-tab offers a high-level overview of all candidates entered.
- Locate candidate profiles via the Find a Candidate search field, or via the Records tab. The Records tab allows you to search for candidates using an SSN.

The screenshot displays the SterlingONE web application interface. At the top, the SterlingONE logo is on the left, and navigation links for Admin, Screening Forms, Help & Resources, and Julie Harder are on the right. Below this is a blue navigation bar with tabs for Dashboard, Applications, Screen, Tasks, Records (highlighted with a red box), and Reporting. Under the Records tab, there are sub-tabs for Candidates (highlighted with a red box), Positions, and Documents. On the left side, there is a sidebar with a 'Find a Candidate' search field (highlighted with a red box) and a 'Quick Launch' button. Below the search field is a 'Recently Viewed' section listing three candidates: Test, Jack B; Candidate, Test; and Test, Julie. The main content area is titled 'Search Candidates' and contains a search form with fields for Candidate ID, Last Name, First Name, and SSN. There are also dropdown menus for Position and Date Range (set to 'Last 60 Days'), and date pickers for 'From' (01/13/2017) and 'To' (03/14/2017). A 'Search' button and a 'Clear All' link are at the bottom of the form. Below the search form is a 'Candidates' table with columns for Name, Modified, and Latest Status. The table lists three candidates with their respective details and 'View Details' links. A red callout box with an arrow points to the 'View Details' link for the first candidate, with the text 'Click "View Details" to open the Candidate Profile'.

**Search Candidates**

Select Saved Search... [Save New Search](#) [Update Saved Search](#)

Candidate ID:  Last Name:  First Name:  SSN:

Position:

Date Range:  From:  To:

[Search](#) [Clear All](#)

**Candidates**

Name	Modified	Latest Status
Candidate, Test (31767075)	Mar 14 10:40 am By Julie Harder	
Test, Julie (7515086)	Mar 8 6:33 am By Sterling Talent Solutions	DOT Verification Complete
Candidate, Test (6203125)	Feb 27 11:16 am By Sterling Talent Solutions	Auto-CCS Test Complete

# SterlingONE: Navigating the Records Tab - Candidate Profile

**Jonathan Smith** [Edit Profile](#) | [Save to PDF](#) | [Print Report](#)

**Candidate ID** 6354392 **Alternate Name** Jonathan Smith  
**Date Added** Sep 26 2016 10:10 am **Email Address** jonathan.smith@talentwise.com  
**Date Last Modified** Jan 12 2017 10:27 am **Portal Login** Active  
**Social Security Number** xxx-xx-5555 **Primary Phone Number** (425) 259-1234  
**Date of Birth** 2/14/1975 **Address** 123 Test St  
**Start Date** Not on File **Everett, WA 98201**  
**Termination Date** Not on File

**Candidate Profile contains all Ticket, Screening, and Onboarding history for a single candidate**

**Ticket History**

ID	Application	Date Sent	Sent To	Status
2332191	Package 2 - SSN/CRIM/EDU/EMP /SEXOFF	Sep 26 '16 10:10 am By Two Men Demo	jvane@talentwise.com	Complete Oct 12 '16 10:15 pm

**Screening History** [Add Screening](#)

ID	Package	Date	Status
96307507	Package 1 - Default - SSN/CRIM /SEXOFF	Sep 26 '16 10:29 am By Two Men Demo	Complete Sep 26 '16 8:43 pm
96306777	Package 2 - SSN/CRIM/EDU/EMP /SEXOFF	Sep 26 '16 10:17 am By Two Men Demo	Complete Sep 26 '16 11:00 am

**Additional screenings can be added via the Candidate Profile**

**Onboarding History** [Add Onboarding](#)

ID	Package	Date	Status	Result
93873615	Standalone Electronic Form I-9	Jul 13 10:24 am By Natasha Wilborn	Complete Jul 13 10:29 am	
93308034	Electronic I-9	Jun 23 9:52 am By Natasha Wilborn	Complete Jun 23 10:54 am	

**Add Onboarding products like new hire forms and the Form I-9**

**Documents (1)**

Document	Uploaded	File Size
Electronic Disclosure ElectronicDisclosure-20160926101309.pdf	Sep 26 '16 10:13 am	314 KB

**PDF copies of completed EDAs and forms are available under Documents**

**Notes (0)** [Add Note](#) +

**Log (13)**

**Internal notes can be added by users**

- Editing a candidate profile does not update existing or in flight reports.
- All ticket, screening, and onboarding history is available within a unique candidate profile and is visible for the lifetime of the account.
- Candidate documents, such as electronically signed disclosures and onboarding forms are also available.

# SterlingONE: Navigating the Records Tab - Documents

- The Records tab > Documents sub-tab houses complete onboarding and Electronic Disclosure & Authorization (EDA) forms for all candidates.
- Documents are available for the lifetime of the account.

The screenshot shows the SterlingONE interface with the 'Records' tab selected. Underneath, the 'Documents' sub-tab is active. On the left, there is a sidebar with 'Find a Candidate' and 'Recently Viewed' sections. The main area contains a 'Search Documents' form with fields for Document Type, Candidate ID, Last Name, First Name, SSN, and Upload date. Below the search form is a table of documents. A red box highlights the 'Download' checkbox in the first row, with an arrow pointing to it and the text 'Select one or multiple documents to download into PDF'. Another red box highlights the PDF icon in the first row, with an arrow pointing to it and the text 'Open or save PDF copy'.

**Search Documents**

Select Saved Search... [Save New Search](#) [Update Saved Search](#)

Document Type: Any

Candidate ID: [ ] Last Name: [ ] First Name: [ ] SSN: [ ]

Uploaded: From (m/d/y) [ ] To (m/d/y) [ ] Uploaded by: Any

[Search](#) [Clear All](#)

**Documents** 1 - 6 of [ ] Viewing Page: 1 | Items per Page: 10 30

Download	Document	Candidate	Uploaded
<input type="checkbox"/>	Electronic Disclosure ElectronicDisclosure-20160926101309.pdf	Smith, Jonathan (6354392)	Sep 26 10:13 am By TalentWise
<input type="checkbox"/>	Electronic Disclosure Early Upgrade Request Form_4.26.2016.docx	Smith, Jonathan (6298207)	Sep 15 12:37 pm By TalentWise
<input type="checkbox"/>	Electronic Disclosure ElectronicDisclosure-20160915105320.pdf	Candidate, Demo (6296847)	Sep 15 10:53 am By TalentWise

# Reporting Capabilities

Reporting capabilities in SterlingONE include billing reports, TAT reports and invoices & statements, all within the SterlingONE user dashboard!

# Verified Person: Reporting

- Users have access to the following reports in Verified Person:
  - Search Results
  - Search Results by Product Type
  - Subject/Applicant Information
  - Subject Alert

\*Note: Invoices are not accessible within the Verified Person platform.

Home Ordering Reports Docs & Forms Admin Logout Operations

Click the Admin tab, and scroll down to the Management Reports section.

Management Reports

[Pending individual report \(csv\) \\*\\*\\*](#)

Search Result Report \*\*

Date range

from (including)

to (including)

Search Results by Product Type Report \*\*

Date range

from (including)

to (including)

? Subject/Applicant Information Report \*\*

Date range

from (including)

to (including)

Include account info?

? Subject Alert Report \*\*

Date range

from (including)

to (including)

Use completion dates instead of entry dates?

# SterlingONE: Navigating the Reporting Tab

- Based on View Rights and Products, users will have access to, some or all, of the following reports in SterlingONE:
  - Summary Report:** Number of applicants per month, Median TAT (turnaround time hours and days), and Criminal Hit Rate (%)
  - Turnaround Report:** Turnaround time by month and hour
  - Billing Report:** Detailed billing report of costs per candidate, including fees.
  - Invoices and Statements:** Monthly Invoices and Statements are accessible via your account!

The screenshot shows the SterlingONE Reporting Tab interface. The navigation bar includes Dashboard, Screen, Onboard, Tasks, Records, and Reporting (highlighted). Below the navigation bar, there are tabs for Summary Report, Turnaround Report, Billing Report, and Invoices and Statements. The Summary Report section is active, displaying filters for Billing Code (My Account and All Subaccounts), Reference Code (All), and Status Date (Select Date Range). The filters allow for specific reporting data. A search button is present. A table displays the Summary Report data for October, September, and August 2016, including Total and Average values. A red arrow points to the 'Download in Excel Format' link, with a callout box stating 'All reports can be downloaded to Excel'.

**Summary Report**

View Report for: My Account and All Subaccounts | Billing Code: Any | Reference Code: All

Status Date: Select Date Range | From: mm/dd/yyyy | To: mm/dd/yyyy

Search

Download in Excel Format

All reports can be downloaded to Excel

Filters allow for specific reporting data

Month	Number of Applicants	Median Turnaround (hrs)	Median Turnaround (days)	Criminal Hit Rate (%)
October 2016	0	0	0	0
September 2016	4	0.4	0	0
August 2016	0	0	0	0
<b>Total: 4</b>		<b>Average: 0.13</b>	<b>Average: 0.00</b>	<b>Average: 0.00</b>

# SterlingONE: Navigating the Records Tab - Invoices and Statements

- Invoices are posted to your SterlingONE account on the 1<sup>st</sup> of every month.
- An invoice email notification is sent between the 7<sup>th</sup> and 10<sup>th</sup> day of each month.
- Invoices reflect the total month-end charges; Billing Reports break down costs per candidate.

**Invoices and Statements**

Month: - All - | Billing Code: - All - | Group By: - No grouping -

Go

Current Balance

Based on your statement balance, your current amount due at this time is \$189.80

- View Statement (September 12, 2016)

**Items 1 - 10 of 23** | Viewing Page: 1 2 3 | Items per Page: 10 30

Date	Billing Code	PO Number	Type
August 31, 2016	D-1		Invoice
April 30, 2016			Invoice

**Billing Report** | Printer-Friendly View | Download in Excel Format

Month: September 2016 | Account: My Account and All Subaccounts - jharder-test@talentwis | Grouping: None | View: Summary Only

Go

This period is closed and already billed.

Billing report can be adjusted to show detailed fees for each candidate

Summary	0 Orders
Total Base Price	0.00
Total Additional Fees	0.00
Monthly Grand Total	\$0.00

# Adding a New User - Admin

# Verified Person: Adding a User

- In Verified Person, clients can create new users by clicking the **Admin** tab, and clicking **Go** under the **Add Users** section.

The screenshot displays the Verified Person Admin interface. At the top, a navigation bar includes tabs for Home, Ordering, Reports, Docs & Forms, Admin, Logout, and Operations. A red arrow points to the Admin tab with a callout box that says "Click Admin". On the left, there is a "Contact" section with fields for Phone (866-380-6100), Fax, and Email (click here). On the right, the "Add Users" section is highlighted in yellow. It contains a "Company" dropdown menu with a "Go" button, a "User ID" dropdown menu with "ogonzalez - Olivia Gonzalez" selected and a "Go" button, and a "Switch Users" section with a "Switch User" button. Below these are sections for "Password" (Change Your Password, Change Passwords for Other Users) and "Management Reports". A red arrow points to the "Go" button under the "Add Users" section with a callout box that says "Click Go under Add Users".

# Verified Person: Adding a User

- Next, complete the new user information and account options.
- Click **Submit**.

The screenshot shows a web form for adding a user, divided into three main sections:

- Access:** Contains three input fields: "User ID" (with the value "ogonzalez"), "Password" (with masked characters and a note "Minimum of 6 alphanumeric characters"), and "Password (verify)".
- Requester Identifier / User Information:** Contains several input fields: "Name", "Title", "Address", "City", "State", "Zip", "Telephone", "Fax", and "E-mail" (with a note "Used for lost passwords").
- Account Options:** Contains three checkboxes: "Administrative Privileges" (with note "Cannot be turned off for admin User ID."), "Login Enabled" (with note "Cannot be turned off for admin User ID."), and "Ordering Enabled". It also features a dropdown menu for "What reports can this user view?" (set to "All Reports Viewable") and a checked checkbox for "Partial reports viewable".

# SterlingONE: Navigating Admin - Adding a User

The **Admin** tab allows parent users to view existing subaccounts, create new users, and change existing user's report viewing rights.

1. To create a new user, click **Create New**.

**Update user view rights:**

- **Billing Only:** User can only view Reporting tab to access invoices and billing report.
- **Self Only:** User can only see reports that they submit.
- **All:** User can see all reports submitted by any user.
- **None:** User can submit, but cannot see any reports or candidates.
- **Group:** If groups are setup, user can see reports submitted by other users within their group. Notify STS if you need to add a new user to a specific group.

User ID	User Name	Roles	Email Address	Report Viewing	Actions
16802857	Julie Vanek	User	jvanek-test@talentwise.com	Self Only	
16803289	Veg Test	User	Test.Veg@test.com	Self Only	
16807262	Julie Harder	User	jtest@talentwise.com	All	
16807264	Julie Vanek	User	julie7vanek7@gmail.com	All	
16810818	Test Demo	User	julie7vanek@talentwise.com	Self Only	
16812523	Veg Test Demo	User	jvanekpatient@talentwise.com	Self Only	
16814954	CCS Test	User	CCS@test.com	Self Only	

# SterlingONE: Navigating Admin - Adding a User

2. Complete required fields marked with an asterisk.
3. Click Create.

Once created, the new user will automatically receive a Welcome email with their login credentials.

The screenshot shows the 'New User' form in the SterlingONE Admin interface. The left sidebar contains navigation options: Dashboard, Home, My Account, User Settings (expanded to show Users, User List, Report Viewing Defaults, Roles, and Account Configuration). The main content area is titled 'New User' and includes a 'Back to Users' link. The form is organized into three main sections:

- User Information:** Contains fields for First Name \*, Last Name \*, and Phone Number \*. Below these are Email Address \* and Report Viewing \* (a dropdown menu currently set to 'Self Only').
- TalentWise Communications:** Includes a checked checkbox and a note: 'Periodically, TalentWise sends industry news, free content, announcements, free event invitations and promotions via email. Check the box to the left to be included in these messages.'
- Company Information:** Contains fields for Company Name \*, Company Phone Number \*, and Website URL. Below these are Country \* (dropdown menu set to 'United States'), Address \*, City \*, State \* (dropdown menu set to 'Washington'), and Zip / Postal Code \*.

At the bottom of the form, there are two buttons: 'Create' (highlighted with a red box) and 'Cancel'.

# Notification Settings - Admin

In the SterlingONE platform,  
you can control a select set of  
notification settings!

# SterlingONE: Navigating Admin - Notifications

- Each user has access to adjust their general notification preferences:
  - Completed report notifications are sent to the requestor when the report is complete.
  - Notifications, by default, are sent to the user who submitted the request.
  - Post-Order Notifications alert the user when additional action is required, for example, when a release form is needed.

**General Notifications**

**Email Notifications**

- Send email notifications (e.g., when my reports become available)
- Disable all report email notifications

**Email Address for Notifications**

- Single address for email notifications - jharder-test@talentwise.com
- Multiple addresses for email notifications

**Applicant Reports**

*For Applicant Reports containing more than one subreport:*

- Notify only when the full Applicant Report is complete
- Notify as each subreport becomes available

**Post-Order Notifications**

- Notify me by email if additional action is needed
- Disable post-order notifications

# SterlingONE: Navigating Admin - Notifications

- Each user has access to adjust their status notification preferences:
  - By default, status notifications are turned off, however during account setup they may be enabled to send daily reports for all candidates over 72 hours old and include all candidates pending a release form.

**Admin** | Screening Forms | Help & Resources | Julie Harder ▾

## Status Notifications

**Daily Status Report** ⓘ

- Send updates on requests older than 48 hours
- Send updates on requests older than 72 hours
- Send updates on requests older than 96 hours
- Don't send daily status reports

**Release Required Report**

- Include Release Required report for all applicants
- Include Release Required report for all applicants older than 24 hours
- Include Release Required report for all applicants older than 48 hours
- Don't send Release Required reports

**Email Address for Daily Status Report**

- Single address for status reports - jharder-test@talentwise.com
- Multiple addresses for status reports

Update the report to include candidates older than a specific timeframe

Choose to receive a list of candidates who are pending a release form

Send Daily Status Report to multiple users. If "multiple" is selected, include your email as well.

# Screening Forms and Help & Resources

SterlingONE offers self-help resources via our Help & Resources page!

# Verified Person: Navigating Screening Forms/Releases

- Accessing releases and forms in Verified Person:

The screenshot shows the application's navigation bar with the following items: Home, Ordering, Reports, Docs & Forms, Admin, Logout, and Operations. A red arrow points to the 'Docs & Forms' menu item. A callout box with a red border contains the text: "Click Docs & Forms to access a list of available documents and release forms." Below the navigation bar, a text instruction reads: "To access any of the (PDF) documents below, simply click on the document name." A list of documents is displayed under the heading "System Use":

- [Quick Start Guide](#)
- [Web Demo](#)
- [User Guide](#)
- [Applicant release form](#)
- [Consumer FCRA rights](#)
- [WA MVR Release Form](#)
- [NH MVR Release Form](#)
- [I-9 and E-Verify FAQs](#)
- [FCRA Summary of Rights](#)
- [PA MVR Release Form](#)
- [PR MVR Release Form](#)
- [PSP Driver Disclosure and Authorization](#)
- [New York Article 23-A](#)
- [New ADR Release - Puerto Rico](#)
- [Sample Disclosure Form](#)
- [Sample Disclosure Form - California](#)
- [Sample Authorization to Obtain Report](#)
- [Sample Pre-Adverse Action Letter](#)
- [Sample Adverse Action Letter](#)

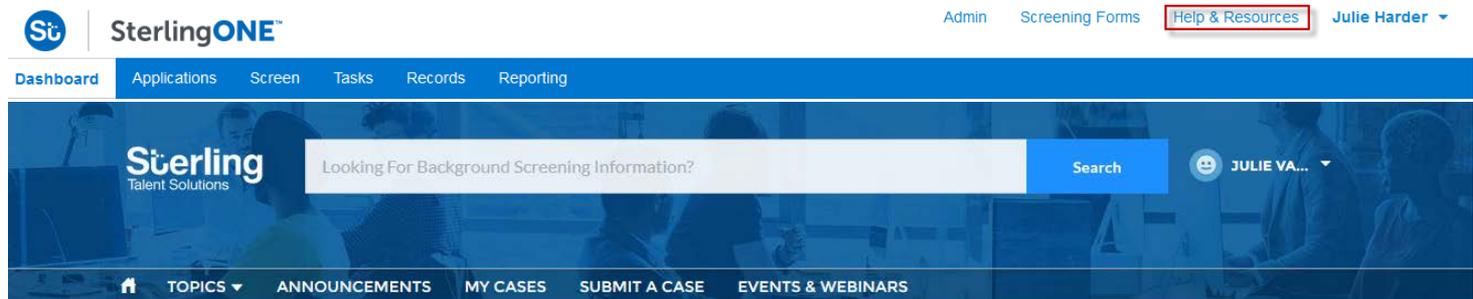
# SterlingONE: Navigating Screening Forms

- In SterlingONE, the **Screening Forms** section of your Dashboard houses samples of Sterling Talent Solutions Pre-Adverse and Adverse Action letters or custom templates as outlined by your company.
- You will also find a link to Sterling Talent Solutions Terms and Conditions, and Privacy Policy.

The screenshot displays the SterlingONE dashboard interface. At the top left is the SterlingONE logo. To the right, there are navigation links for 'Admin', 'Screening Forms' (highlighted with a red box), 'Help & Resources', and 'Julie Harder'. Below the header is a blue navigation bar with links for 'Dashboard', 'Applications', 'Screen', 'Tasks', 'Records', and 'Reporting'. Underneath this bar is a sub-navigation bar with 'Screening Forms', 'Terms and Conditions', and 'Privacy Policy' (all highlighted with red boxes). The main content area is titled 'Release and FCRA Documents' and contains a section for 'Pre-Adverse and Adverse Letters Templates'. On the left side of this section is a 'Find a Candidate' search box with a search icon. The main content area lists two items: 'Pre-Adverse TalentWise (html)' and 'Adverse TalentWise (html)'.

# SterlingONE: Navigating Help & Resources

- The **Help & Resources** link gives you access to Sterling Talent Solutions extensive knowledge base at any time. Here you can get product and technical support, stay up-to-date with compliance issues, create and manage support cases, and learn more about SterlingONE.
- To access **Help & Resources**, click on the link in the upper-right corner of your Dashboard. A second tab will open.



## WELCOME!

Welcome to the new Sterling Talent Solutions Community  
Home to where you have real time information and solutions to your questions



### TRENDING ARTICLES

- Form I-9 Document Types
- State Tax Withholding Tutorial Video
- Canceling and Resubmitting a New Hire Form
- Deactivating a SterlingONE Candidate

# SterlingONE: Navigating Help & Resources

- The search bar at the top allows you to search keywords and topics within the Help & Resources knowledge base. This is great if you have an idea of what you're looking for.
- The **Topics** tab lets you explore all of the areas within Help & Resources. You can browse articles relating to Product information, Training & Support, Release Forms, and Compliance information.

The screenshot shows the SterlingONE Help & Resources website. At the top left is the Sterling Talent Solutions logo. A search bar contains the text "Looking For Background Screening Information?" with a "Search" button to its right. A user profile for "JULIE VA..." is visible in the top right. Below the search bar is a navigation menu with "TOPICS" selected, showing a dropdown menu with options: "Release Forms", "I-9 & E-Verify", "Screening Products", "Compliance Updates", and "Training & Support". Other menu items include "ANNOUNCEMENTS", "MY CASES", "SUBMIT A CASE", and "EVENTS & WEBINARS". The main content area features a "WELCOME!" heading, followed by the text "Welcome to the new Sterling Talent Solutions Community" and "Come to where you have real time information and solutions to your questions". Below this is a row of three featured articles: "COMPLIANCE UPDATES" (with a yellow pushpin icon), "TRAINING & SUPPORT" (with a man presenting to a group), and "SCREENING PRODUCTS" (with a man presenting to a group). To the right of the featured articles is a "TRENDING ARTICLES" section listing: "Form I-9 Document Types", "State Tax Withholding Tutorial Video", "Canceling and Resubmitting a New Hire Form", and "Deactivating a SterlingONE Candidate".

# SterlingONE: Release Forms - Navigating Help & Resources

The screenshot shows the SterlingONE search interface. The search bar contains the text "Release Form" and a blue "Search" button. A red arrow points from a callout box to the search bar. The callout box contains the text: "All release form templates can be located in Help & Resources by searching for key words". Below the search bar, there are navigation links: "TOPICS", "ANNOUNCEMENTS", "SUBMIT A CASE", and "EVENTS & WEBINARS". The Sterling logo and "Talent Solutions" are visible in the top left corner.

## RESULTS FOR "RELEASE FORM"

ALL ARTICLES CASES

### Articles

[View More](#)

5+ Results • Sorted by Relevance

ARTICLE TITLE	SUMMARY	ARTICLE NUMBER	PUBLISHED DATE
<a href="#">General Release Form</a>	This article will provide details in regards to required i...	000001326	9/27/2016 4:29 PM
<a href="#">Pennsylvania DMV Release Form</a>	This article will provide details in regards to required i...	000001307	9/27/2016 4:25 PM
<a href="#">Washington DMV Release Form</a>	This article will provide details in regards to required i...	000001337	9/27/2016 4:31 PM
<a href="#">Canada Criminal Records Release Form</a>	This article will provide details in regards to required i...	000001328	9/27/2016 4:29 PM

# SterlingONE: Navigating Help & Resources - Tabs

Other helpful tabs on the Help & Resources main page include:

## Announcements tab:

- Takes you to a page dedicated to SterlingONE System Updates.

## My Cases tab:

- Will list all of your open support cases and their current status. To see case details, just click on the link to go to the case detail page. If you don't have any open support cases, this tab will be empty. Open cases can also be viewed at the bottom of the home page.

## Events & Webinars tab:

- Will take you to a page where you can register for upcoming training, compliance, and informational webinars.

## Additional Information:

- Trending Articles are shown to the right of the page.

# SterlingONE: Navigating Help & Resources - Creating a Case

- There are many locations to create a case:
  - Under the My Cases tab, under the Submit a Case tab, or under the Trending Articles on the Home page.
- Cases will be routed to your dedicated Client Services POD.

TOPICS ▾ ANNOUNCEMENTS MY CASES **SUBMIT A CASE** EVENTS & WEBINARS

## CREATE COMMUNITY CASE

Subject

Description

Support Type  
--None--

Case Detail  
--None--

Issue Severity  
Severity 4

Candidate Name

Report ID

**Complete all required fields:**

- **Subject:** What the case is regarding.
- **Description:** A high-level description of your inquiry.
- **Support Type:** General or Technical
- **Case Detail:** Choose a category for your inquiry.
- **Issue Severity (Technical Cases Only):** On a scale of 1-5. 1 being critical, systems are down, and 5 being minor, functionality is missing.
- **Candidate Name & ID** are only required for the case detail of Candidate Inquiry.

Confirm

# Compliance

Minor experience changes on the SterlingONE platform help you be more compliant!

# Compliance Experience Changes

- Additional information on these changes will be discussed on weekly Monday webinars with our Vice President of Compliance.

## Details of the SSN Trace are not visible on the report

- In keeping with industry best-practices, address history will now be used solely as an internal pointer tool to locate possible alternative names and jurisdictions for court searches. This means that a candidate's address history will no longer be viewable to you on the background report. Both clients and screening companies run the risk of litigation if the information is provided in the context of employment screening.

## Adverse Action must be manually initiated

- Based on laws in some jurisdictions and EEOC guidance, Sterling Talent Solutions does not score or rate a background check for a clients' applicant and then automatically send the Pre-Adverse action letter.
  - New York Fair Chance Act
  - Los Angeles Fair Chance Initiative
  - Equal Employment Opportunity Commission

## Nationwide Database records will be validated at the court level

- Section 613 of the FCRA states that a consumer reporting agency must maintain strict procedures designed to insure that whenever public record information, which is likely to have an adverse effect on a consumer's ability to obtain employment, is reported, it is complete and up to date. Sterling validates all criminal records found in the Nationwide Criminal Database search in order to be compliant.

## New products cannot be added to existing reports

- In order to ensure all reports are accurate and up-to-date, additional searches must be submitted within a new report and cannot be added to existing reports. All reports for a single candidate are consolidated under the Candidate Profile.

# SterlingONE Simplifies Screening & Onboarding

The following slides will showcase additional features of the SterlingONE platform that you may have interest in post-upgrade.

# We Understand the Complexity of Hiring

In talking to customers, they've told us that before using SterlingONE, their manual hiring processes were:

## Inefficient for HR

- Less time for strategic tasks
- Hard costs in paper and shipping
- Substantial new hire replacement costs

## Creating Compliance Risks

- Excessive human involvement vs. leveraging automation
- Difficult to keep up with current government forms
- Fines and audits can be extremely costly

## Negatively Impacting the Candidate Experience

- "Administrivia" consumes time for new hires
- Less opportunity to engage with co-workers
- Affects first impressions of company culture

# We've Created a Simpler Way to Screen and Onboard with SterlingONE

## A Unified Hiring Process on a Single Platform!

### Increases Efficiency

- All the paper associated with hiring disappears
- The use of phone, fax, and overnight mail are no longer necessary
- The entire process could be managed using one solution from a single vendor

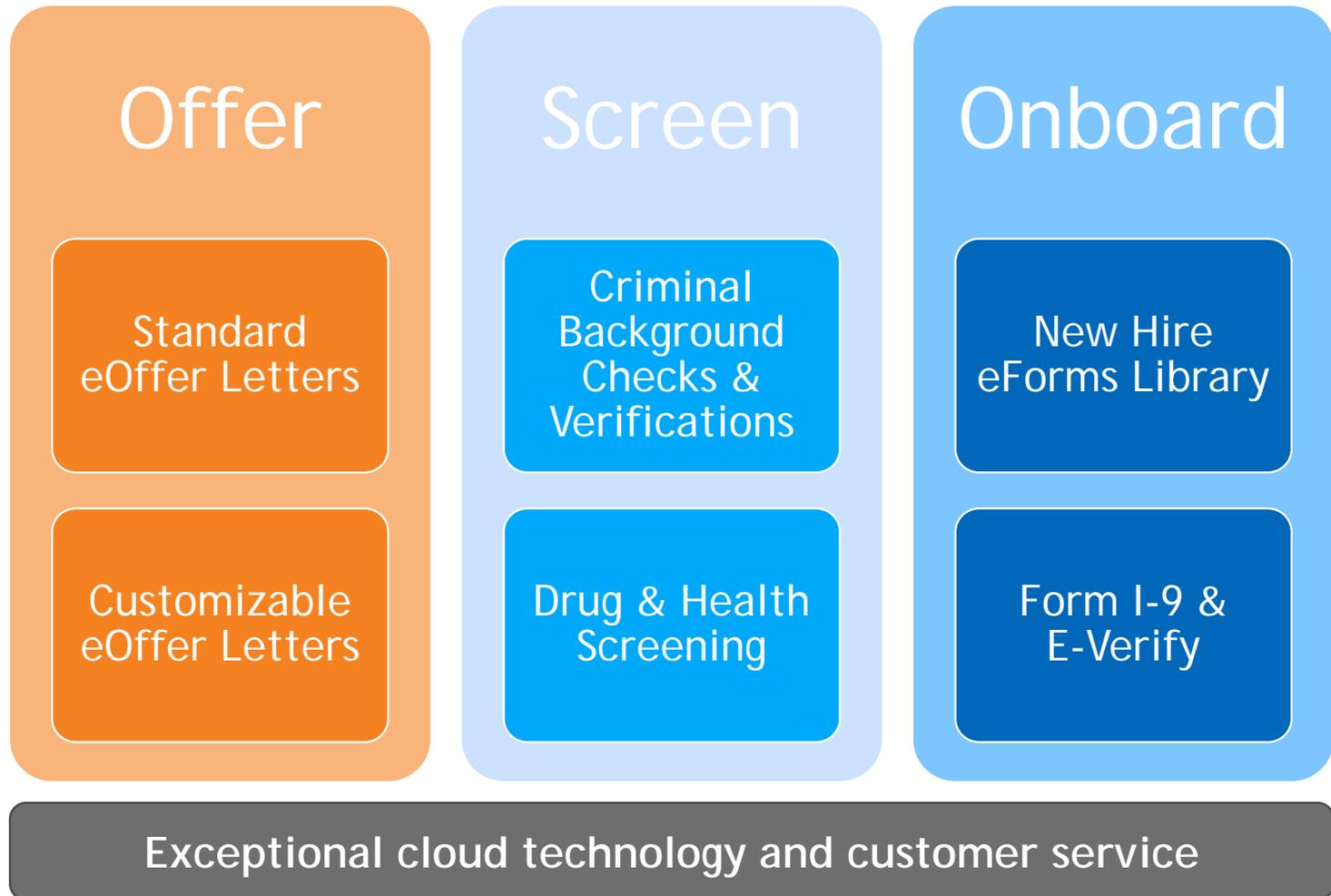
### Reduces Compliance Risk

- State tax forms and I-9 are monitored and updated as changes are implemented

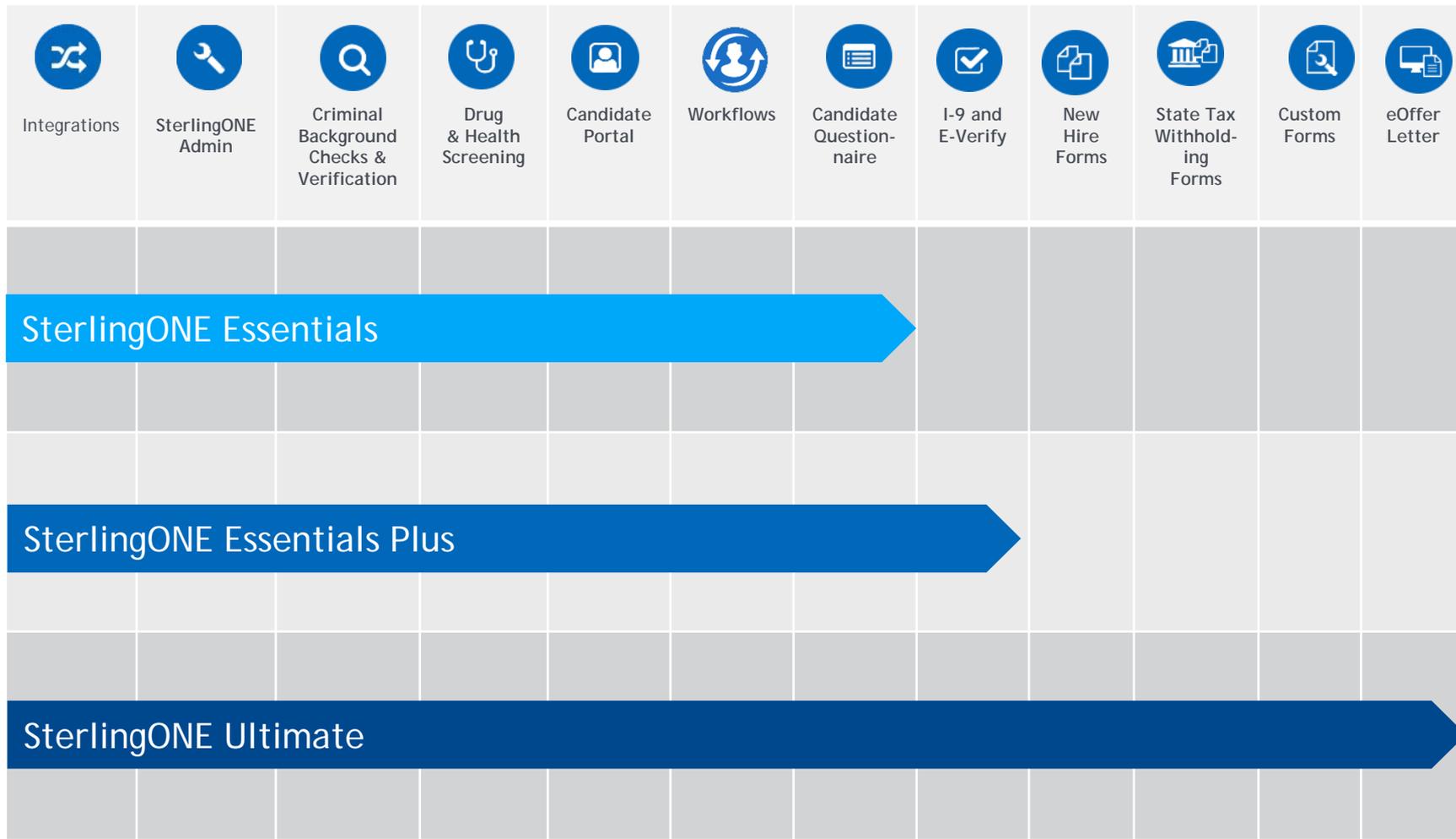
### Creates an Awesome Candidate Experience

- Candidates can complete their new hire paperwork electronically via a secure candidate portal from the convenience of their home and before day one

# SterlingONE Optimizes Your Hiring Workflow



# Bundled Solutions Designed to Meet Your Needs



# SterlingONE Electronic Forms

## eForms Library for Streamlined Onboarding:

- eOffer Letters
- Government Forms:
  - Electronic Form I-9 and E-Verify
  - W-4/W-9
  - EEO Form
  - Over 120 State Tax Withholding Forms
- Corporate Forms:
  - Direct Deposit Authorization
  - Emergency Contact Form
- Supplemental Hiring Documents:
  - Your company's unique health, dental, life, disability, 401K enrollment, corporate policies, etc.

# Complete Criminal Locator Add-on

Our Complete Criminal Locator, which includes Locator Select, provides the highest level of confidence you need for a safer, more secure workplace.

How does it work?

We use your candidate's SSN to run an SSN Trace to identify ideal locations to search, scouring thousands of data sources and over 34 billion addresses across the U.S.

Next we run an Enhanced Nationwide Database Search using the candidate's Name and DOB to scour thousands of aggregated sources, further expanding the list of criminal record search locations.

With Locator Select - our proprietary solution, we search over 2,000 booking and incarceration sites and validate with primary source data from county courts, over 75% of which are automated.

The result? Up to 23% more criminal records identified than our competitors. In fact, for every 1 in 3 applicants with a criminal record, we find at least 1 more conviction.

# Welcome to SterlingONE!

If you have any questions or concerns, please contact your dedicated Client Services POD or CSE.



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