# Quick Start Guide to HireRight Account Features

## Contents

Legal Disclaimer: Reproduction or distribution of these materials in any form without prior written permission is prohibited. HireRight prepared these materials for informational purposes only. These materials are not intended to be comprehensive, and are not a substitute for, and should not be construed as, legal advice. HireRight does not warrant any statements in these materials. Employers should direct to their own experienced legal counsel questions involving their organization's compliance with or interpretation or application of laws or regulations and any additional legal requirements that may apply.

*NOTE: Account configurations may differ. For instance, package names and fields for collecting internal information for invoicing purposes may or may not be present in your live account. These options are not shown in the general images provided in this guide.*

# You're NEW – Let's get started

- Sign-in at https://ows01.hireright.com/login/
- Enter your provided **Company ID**, **user name** and **temporary password** and click **Login**.
- Review the Legal Requirements at the bottom of the login screen.
- First time access will include a prompt for you to create a personal password and a password reminder - for future help should you forget your login.

> By completing these steps, you can get help retrieving any of these three items by clicking the link: "**Need help with login**?" below the Login button. It will open to a self-service screen to help with the required Login fields, or if your account is locked.

Please refer to the multi-factor authentication document for additional login security practices in place.

## Getting Help

We generally support both technology and service delivery questions for our products and services, for instance:

- Questions or clarifications about using our ordering platform
- Technical issues regarding our platforms and integrations that may arise
- Inquiries into your existing reports that have been submitted or completed
- Questions or clarifications about user set-up, permissions and roles
- Password resets

## Let's get you familiar with your Account Features

This section describes the key areas of your HireRight account home page that you will see once you have logged into your account.

1. The left menu can be collapsed if required using the 'X' icon, **Account Status** is only visible if account level action is required, **Alerts** sent from HireRight that may require action or be for your information only regarding in progress orders, **Announcements** from HireRight related to maintenance and service updates and **Recently Viewed Items**
2. **Search**
3. **Select Account and Sign Out**
4. **Menu** to access additional account or program tools such as **Account Setup, I-9 Forms, Billing, etc.**
5. **Help & Training** for contacting Customer Service or accessing reference materials
6. **Screening Manager** dashboard for viewing orders in real-time or results
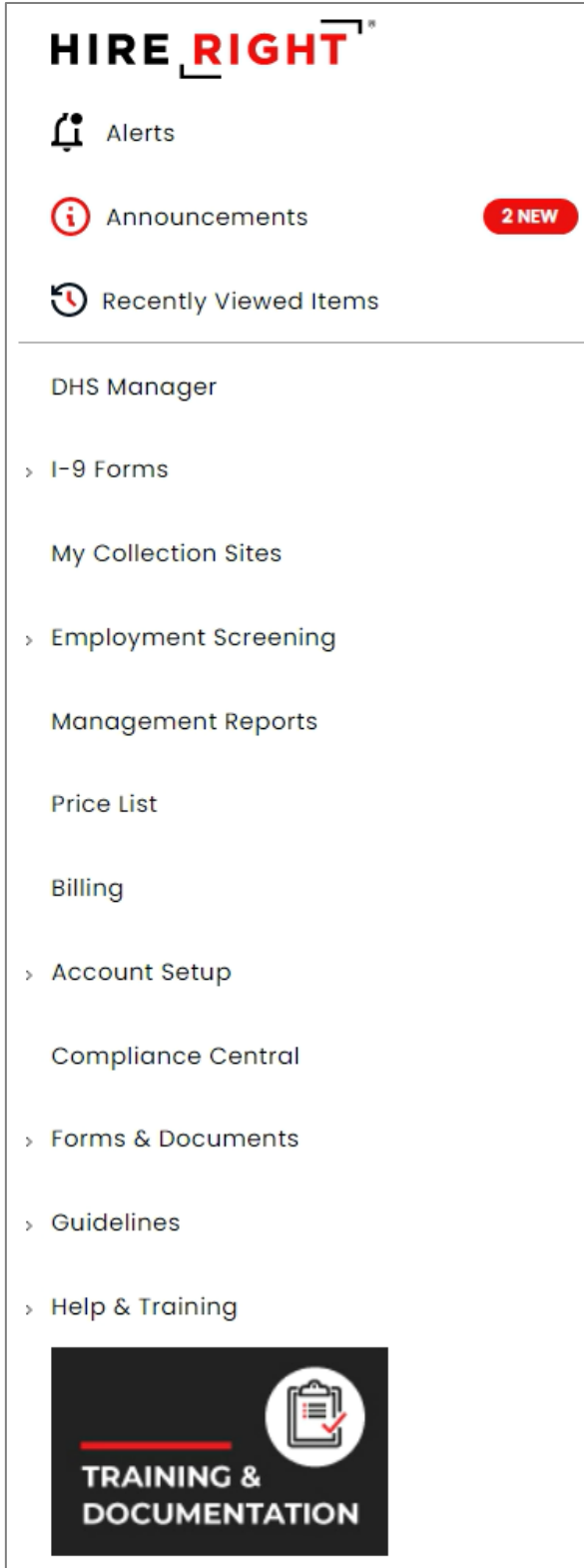
## SEARCH:

To find an order, use **Search**. Search allows you search for requests by: Applicant First Name, Applicant Last Name, Personal ID, and Request ID. Search can be used to find orders that are no longer visible on the Screening Manager dashboard.  Search also supports a Search All Accounts feature, if applicable.



## ORDERS AND REPORTS:

The **Orders and Reports** area displays real-time information on orders. Orders are organized by **Status Tabs**, described below.

- **Invitations:** View, Resend, or Cancel
- **Not Submitted:** Orders that were initiated but not submitted to HireRight for processing and require requestor to take additional steps for submission
- **In Progress:** Real-time details for submitted orders
- **Pending Adjudication: Enabled for customers using Adjudication Services Features** Completed orders that require your organization's review and final status setting
- **Completed:** Orders that are completed and available results posted
- **Cancelled:** Cancelled orders



Note: Additional tabs may be available in some accounts

HIRE RIGHT ®

🔔 Alerts

ⓘ Announcements    2 NEW

🕓 Recently Viewed Items

DHS Manager

› I-9 Forms

My Collection Sites

› Employment Screening

Management Reports

Price List

Billing

› Account Setup

Compliance Central

› Forms & Documents

› Guidelines

› Help & Training

TRAINING &
DOCUMENTATION

**MENU:**

The **Menu** provides access to various features, available based on the logged in user's privileges, such as Price List, Management Reports, Account Setup features, Billing, Compliance resources, printable documentation and help resources.
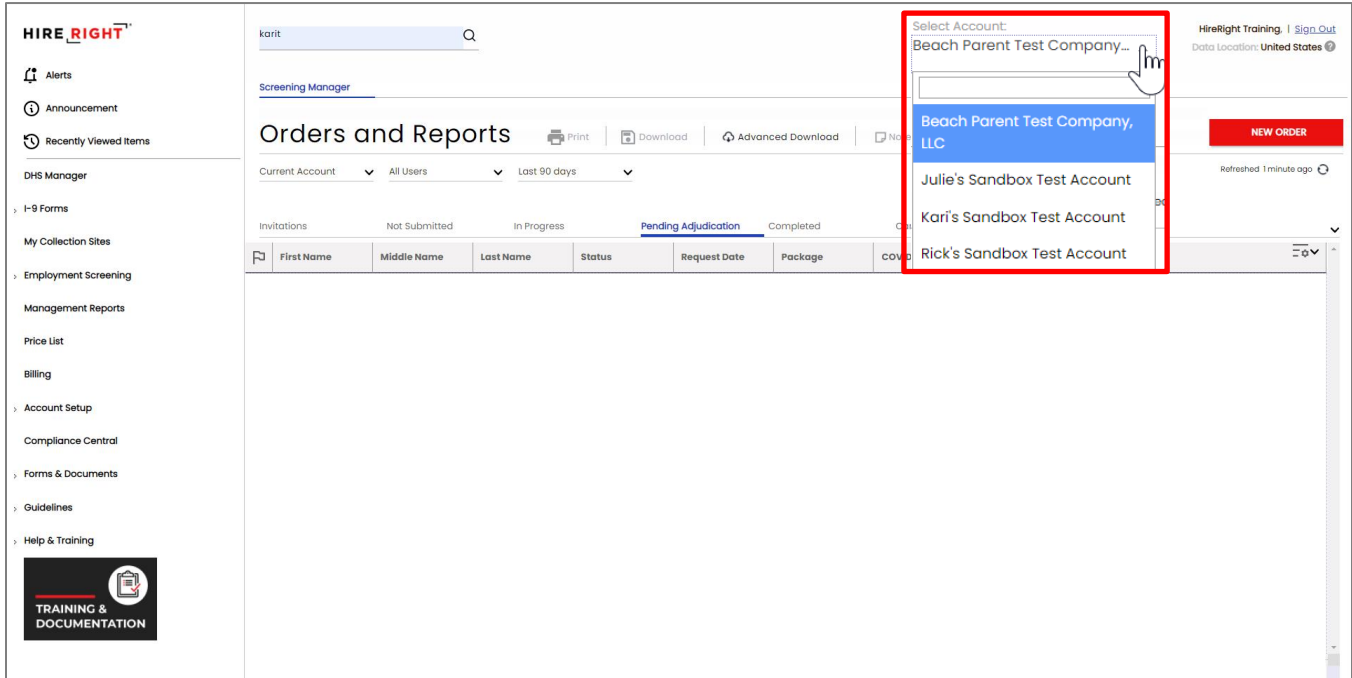
NOTE: Package and a la carte pricing can be viewed in the Price List.

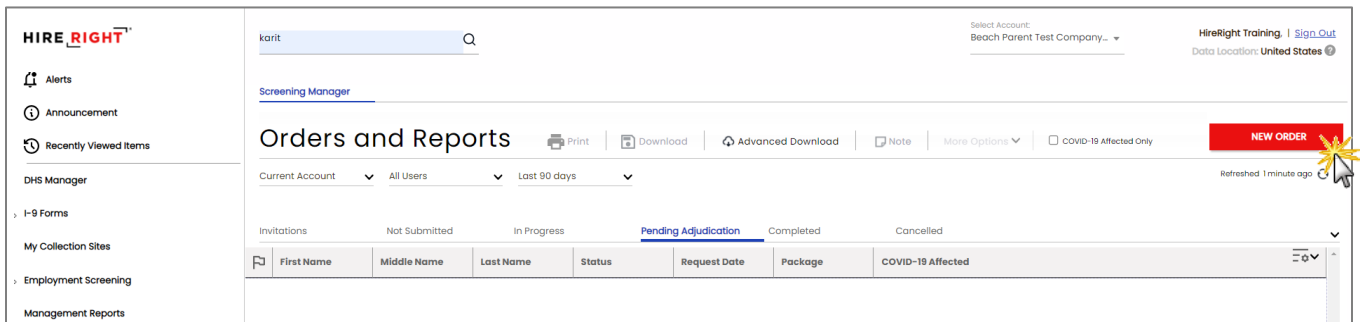Click on **Help & Training** to access Live Help and other support resources.

Click on the **Training & Documentation** icon to self-support resources.

# How to Place a New Order

Have access to more than one account? Use **Select Account** first to initiate the order in the desired account.



1.  Click **New Order** on the right of the Screening Manager dashboard.

**2.** Confirm, Select or Add New **Job Location** and click **Next** (not shown) in the lower right of the screen.

- Click **Select** to view job locations and/or to select a different job location
- Click **Add New** to add a new job location

**Provide Job Location**

**Job Location** ⓘ

Corporate
Nashville, Tennessee 37214
County: Davidson
USA

Select          Add new

**Select Package**, using the drop-down arrow. View **Order Details** to confirm that these are the services you wish to order for the individual who will be screened.

**Select Package & Add-on Services**

**Packages**

Select Package *

Sample Pre-Employment Screening Package          KIOSK LINK

**Order Details**

**Add-on Service**   You selected the following add-on services

| | |
|---|---|
| Widescreen Plus National Criminal Search ⓘ | 1 |
| Prohibited Parties Terrorist Watchlist ⓘ | 1 name |
| Education Report Education Verification ⓘ | 1 institution |
| Employment Report Employment Verification ⓘ | 3 employers |

**Please select the products you would like to include in your background report**

Order additional services by selecting each product and specifying a number where requested

⌄ Civil Records

NEXT

**3.** Click **Next** to continue.

**NOTE:** A la carte services may be available and added for an additional fee.

Fees may display for add-on services, as applicable, based on the account configuration.

**4. Who will complete the background form**

Most accounts are configured to let you enter the information or use the more common workflow to email the applicant an invitation to fill in their data for the order.

**Define Order**

**Who will complete the background forms?**

◉ **Complete background forms myself**

◯ Email applicant information to log on and complete background forms

The next step is for the Applicant or Requestor (as appropriate) to complete any requirements via the online form. The order is created only after the applicant (or the requester) submits the forms.

**For Email Applicant workflow**

1. Enter applicant's first and last names as well as their email address in the provided required fields.

2. At the bottom of the page, check the box to confirm you have read and complied with the Legal Requirements for requesting a background check.

3. Click **Next** to send the invitation to the applicant.



If drug or health services are in the package and/or selected services, an additional screen may display.

HireRight makes it easy for Applicants to get answers to frequently asked questions about background screening. Feel free to direct them here before starting the background check.

## Additional options we have available to you for your Applicant Workflow

- **Send a text invite**. You must have applicant's permission to use this feature.
- **Upload documents** allows a single file upload of documentation to accompany the order, such as a copy of the degree/diploma, current employment documents, or an MVR release form, to name a few. Requestor can only upload one file. If documents are required once the order is placed, we'll let you know and most likely reach out directly to your applicant.
- **Invite additional applicants to complete their information for their individual screening.** Click the green plus to **Add Applicant**. You can send up to five (5) invites at one time. Be sure the job location and services/package you already indicated is applicable.
- **A default invitation** will be sent to the applicant. HireRight supports Super Users with the ability to modify the email, if desired, by clicking the **Preview/Edit** button.
- Send yourself a copy of the invitation by checking the box if you wish to receive a copy of the invitation to the applicant.

## Additional options can be enabled by HireRight:

- **Flex Fields**, like the ones shown in the box below, can be added to collect information important to your organization.
- **Hiring Manager** can be enabled for adding an email for an approved individual in your organization to receive general status notifications about the applicant's order status.
- **Language** may be enabled for your account, allowing the default invitation to be sent to the applicant in a chosen language. We offer the Applicant Invitations in 25 languages.
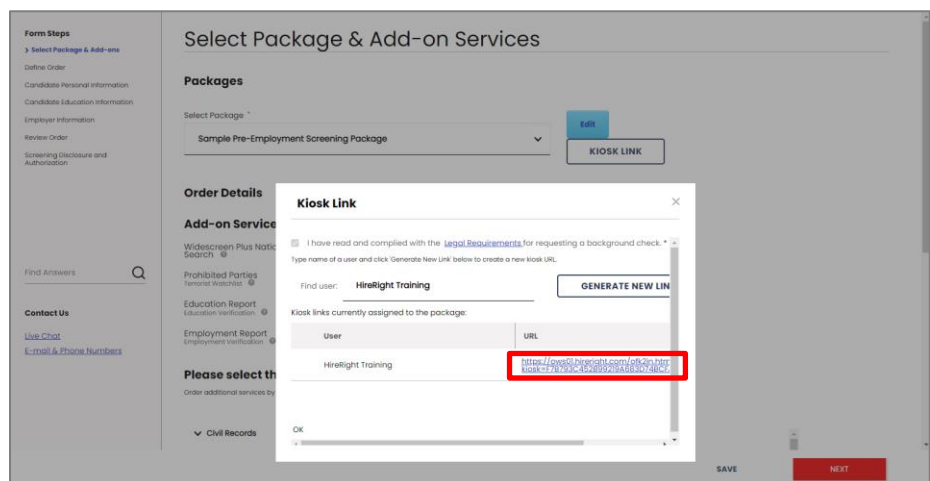
# To Create the Kiosk Link

1. Click **New Order**.

2. Select **Service Package**.

3. Click **Kiosk**.

4. Confirm you have read and complied with the Legal Requirements.
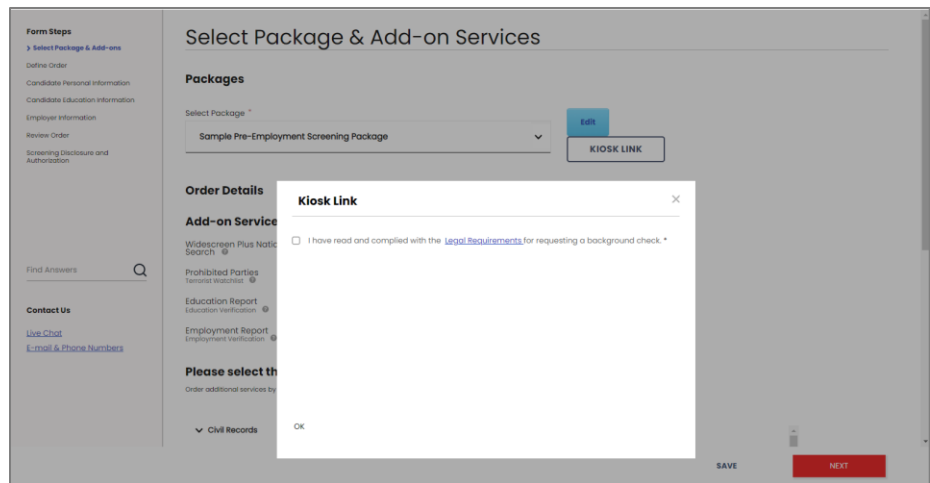


5. Click **Generate Link**.
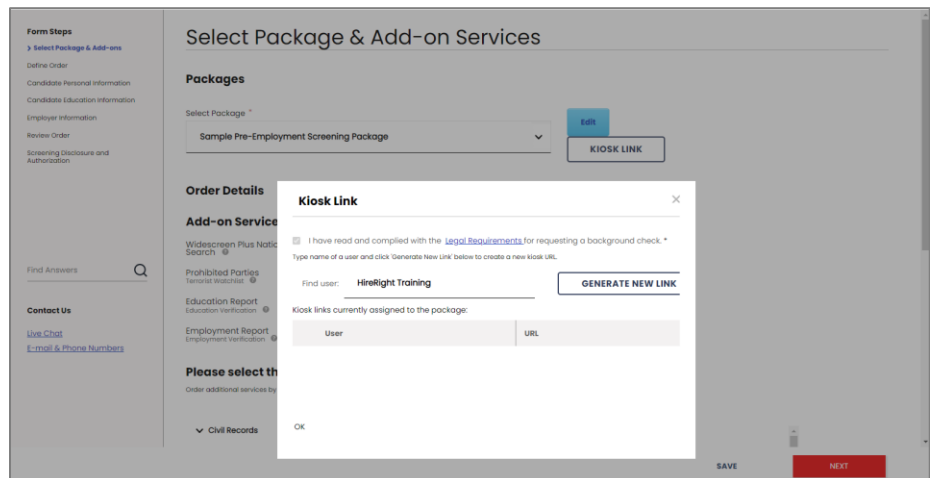


6. A reusable kiosk url link is created for the selected **package and the initiator**, ensuring notifications and (eventually) results are returned to that initiator.

7. Provide the url to applicants. This can be done via email, creating a shortcut on a laptop or tablet or a saved browser bookmark.

## Notifications

By default, HireRight typically notifies the order **Requestor** by email for general status updates such as:

- Applicant Invitation Expired
- In Progress
- Action Required (during processing)
- Delay
- Complete
- Action Required (such as review/adjudicate)

Additional Notifications and configurations are available.

Notifications to the **Applicant** are typically made by phone, email or text, when authorized. Common Notifications include:

- Reminder to complete online form
- Copy of electronically signed Consent, Disclosure, and Authorization
- Action Required during processing of the background verification

HireRight will only contact your applicant if:

1) Your Guidelines allow us to make contact; and
2) If information, documentation or clarification is needed to proceed with the background check
   a. For example, HireRight needs one or more of the following to proceed with verification or background check:
      i. Copy of ID
      ii. Hand signed consent or special release form
      iii. Documents to support Employment verification

      iv. Copy of Degree/Diploma if school/university has difficulty verifying information

**NOTE: The above items are most common but other requirements may arise.**

## Responding to Action Required

Additional information, documentation or clarification may be provided to HireRight via phone, email, fax, or upload, as applicable. Details will be included within any HireRight communications.

# Monitor the order details

You will find orders that you have initiated within the appropriate tab: Invitation, Not Submitted or In Progress. Right-click for menu or double-click to **View**. HireRight provides real-time notifications of order status and results posting. Locate your order on the Screening Manager dashboard.
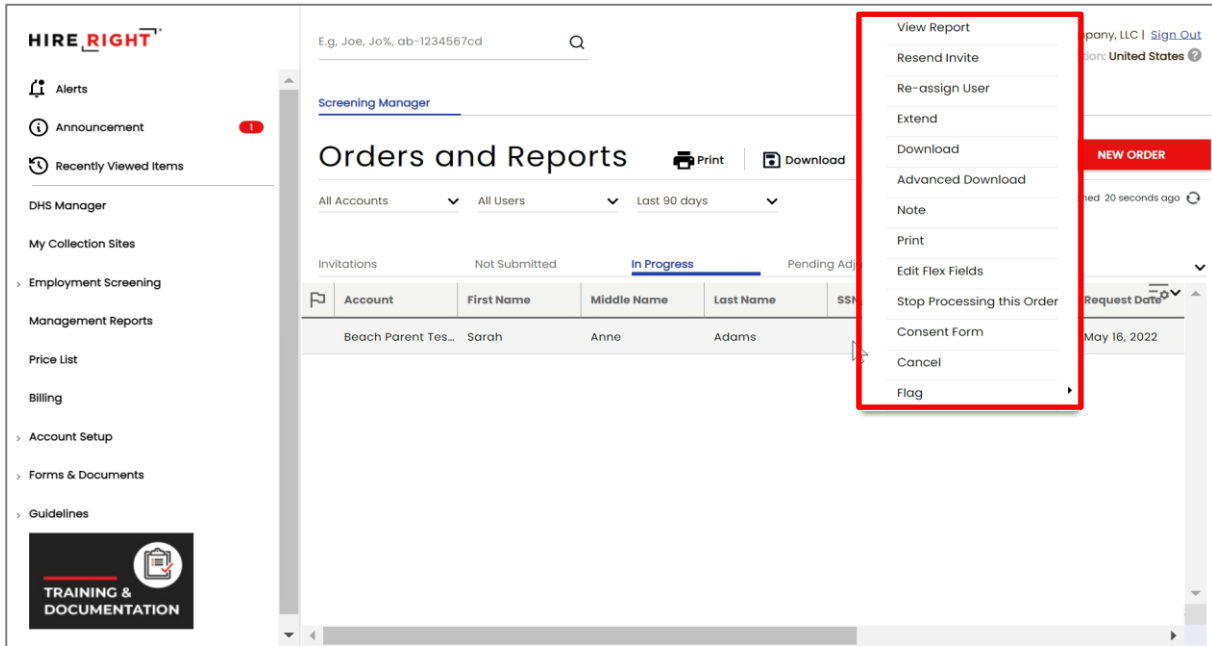


The report opens, displaying a **Report Summary** of the order details including date submitted/completed, turnaround, package, job location, status of the search or verification, etc.

The report opens displaying **Report Details** for the selected service. Scroll up or down using the control on the right to view the full details of processing including any delay notifications, applicant contact and results.
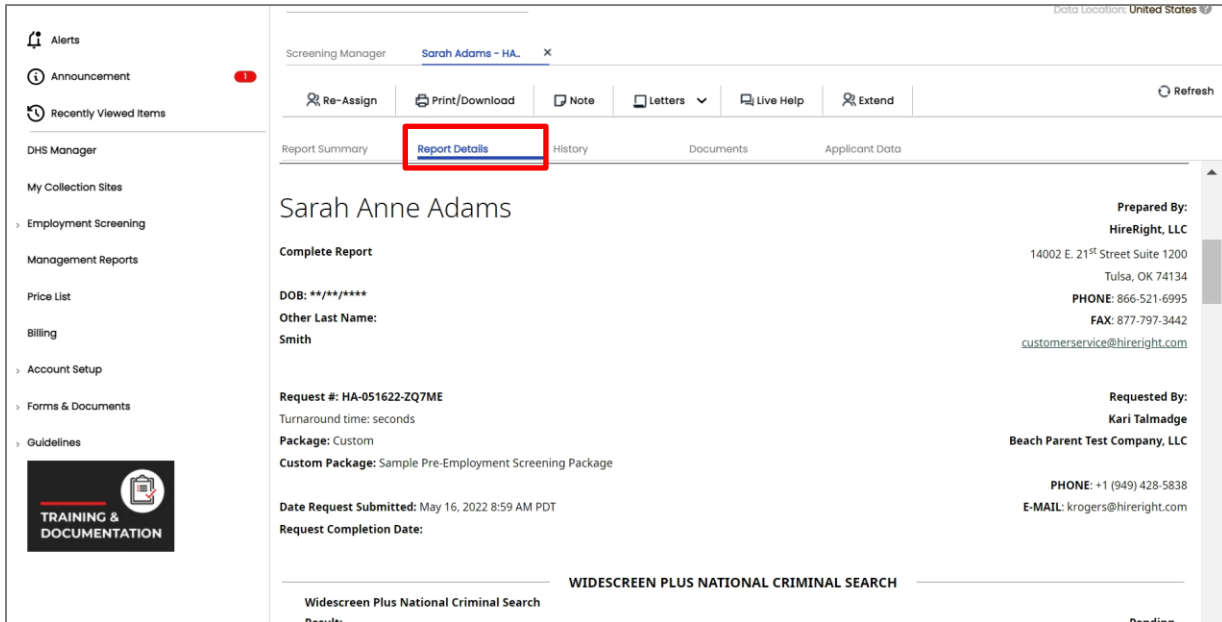


Refer to our **Adjudication Guide** if you require detailed steps on setting Adjudication status.

# How to Stop the Processing of an Order

*NOTE: You must access the order in the account in which it was initiated in order to take any actions other than view. This permission may not be available to all users, by default.*

To stop a report that is **In Progress**, go to the **In Progress** tab and **right-click on the request** that you want to cancel.

Select '**Stop Processing this Order**'.
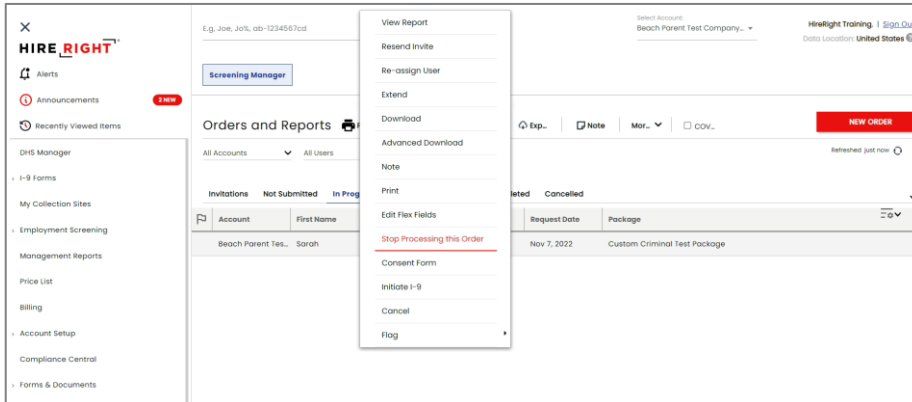


Select the **Reason** for the cancellation by clicking on the pull-down menu and selecting the reason.

Click **Stop Request**.

The order will be canceled and moved to the **Cancelled** tab. Canceled orders cannot be restored.
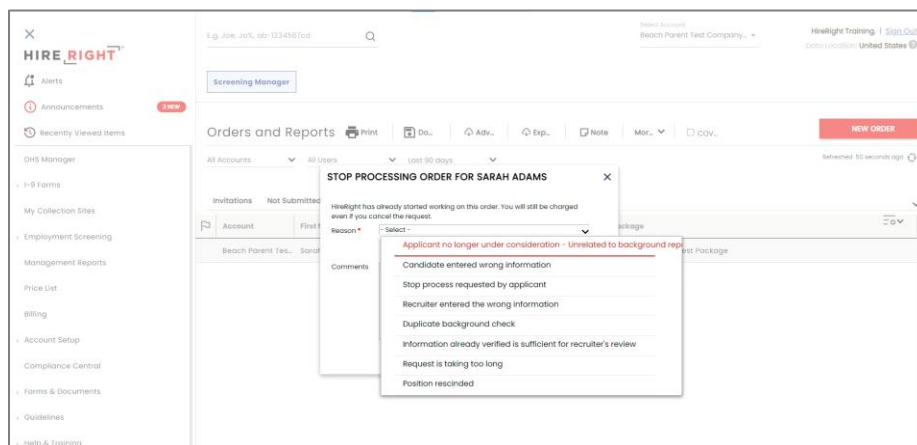


**IMPORTANT NOTE:** If the "Reason" selection is '*Information already verified is sufficient for recruiter's review*', '*Position rescinded*' 'or '*Request is taking too long',* the order will act as completed and be moved to either the **Pending Adjudication** or **Completed** tab, depending on adjudication guidelines and/or account settings.

- *For non-adjudicated accounts,* the order will move to the Completed tab.
- *For adjudicated accounts*, the user will need to set a final adjudication status before the order will move to the Completed tab.

# Stop Processing - Product Level

To stop a product that is already submitted and in progress:

1. Access the **In Progress** report.
2. The **Report Summary** tab will display the current status of each product (service) in the order. You can only **Stop Processing Product(s)** (service(s)) that show "Pending" or "Waiting for Reply" in the **Fulfillment/Search Results** column next to the product. If the product has already been completed and has a completed date, it cannot be canceled.
3. Right-click on the product you wish to cancel and select **Stop Processing this Product**.
4. You are required to select the **Reason**.
5. The comments field is optional. Comments added here will be visible on the "History" tab.



Reminder: Ensure you have selected the appropriate product and/or jurisdiction before you click **Stop Request**. Once you select "Stop Request," the cancellation request is sent to HireRight and cannot be re-opened.

An automated note is placed in the **Report Details** tab in the product notes indicating the cancellation request.



The **History** tab will log the user who initiated the cancellation, the date/time and the selected reason.



Once HireRight has completed the cancellation request, the product will reflect a status of **Canceled by Requester**. If your account is set up with adjudication, the adjudication status for that product may be visible, depending on the user's permissions.



If there are other products in progress, the report will remain on the **In Progress** tab until those products have been completed. If additional products need to be cancelled, follow the same steps above.

- **Non-Adjudicated accounts**: If the product that was stopped was the last product in the package to complete, once the report is qa'd and ready, it will be moved to the **Completed** tab for review.
- **Adjudicated accounts**: If the product that was stopped was the last product in the package to complete, an adjudication status will be set based on the report results in accordance with your adjudication guidelines. The report will route to either the **Completed** or **Pending Adjudication** tab for review.

# How to Add a Service to your Order

The **Extend** feature allows you to add screening services to an order and prefill the existing Applicant information to the new order. Do not use Extend to correct previously submitted information.

If the original order is already **Complete**, the Extend feature will direct you through New Order initiation. If the order is *Completed*, you will receive a message indicating the order is completed and asking if you wish to create a New Order. Click YES if you wish to proceed with the order.
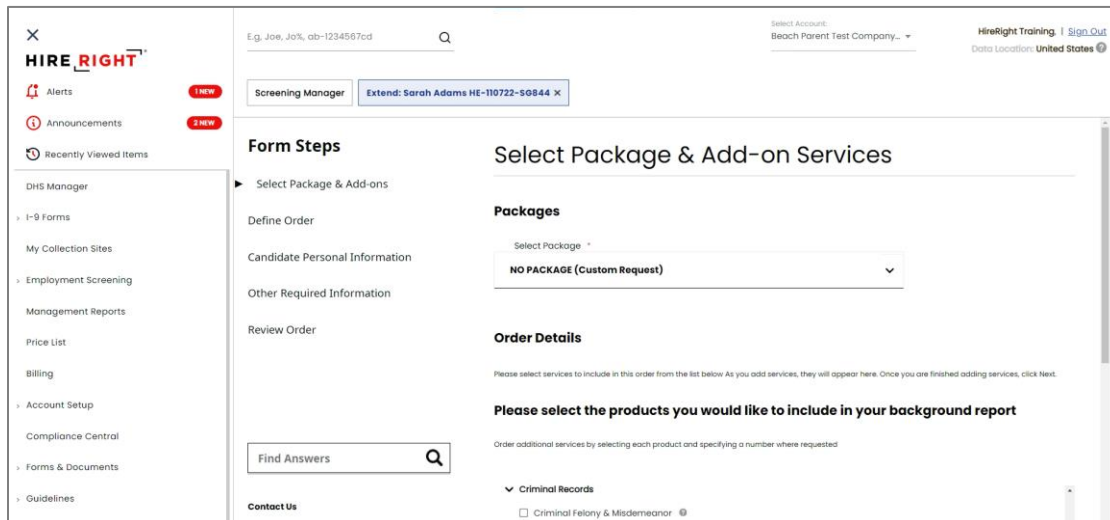
If the order is **In Progress**, the services will be added to the existing order and results are integrated into the existing report.

**To Extend an Order:**

Locate the order from under the **In Progress** or **Completed** tab. **Right-click on the request** that you want to Extend and select **EXTEND**.
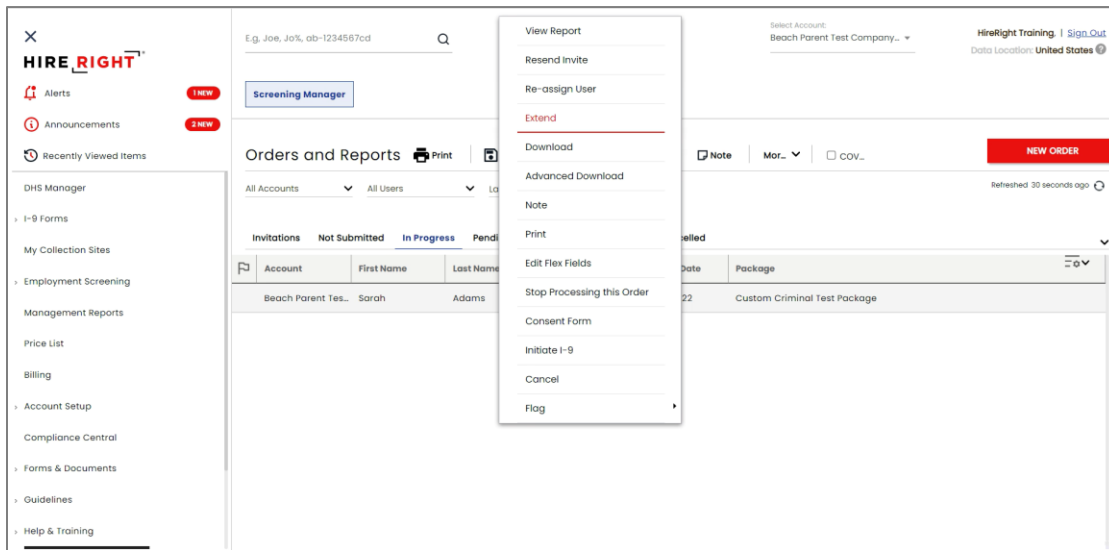


You will select the desired services whether a Package or a la carte service(s) and follow steps to complete the order initiation.

![HireRight logo]

# Learn More about HireRight platform, products and services

Using HireRight is simple when you have direct access to the support resources and training you need. HireRight customers have access to the following **complimentary** training resources.

### Training & Documentation

Access user guides and FAQs anytime from within your HireRight account by clicking Help & Training or the online training icon, as shown below.

### Instructor-Led Training

HireRight hosts regularly scheduled online, instructor-led training sessions to introduce system features, products and processes. These sessions range from 30 – 90 minutes. You may self-register to attend the session(s) of your choice by going to https://www.hireright.com/InstructorLedTraining
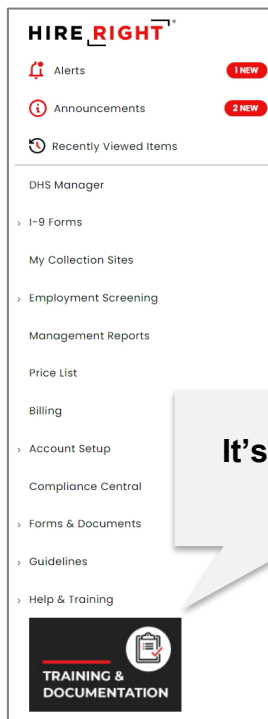


**It's all RIGHT inside**

Have Questions? We have Answers. | Contact Us  or connect with us through Live Help once you're in the HireRight platform.