Table of Contents

Introduction .................................................................................................................................................. 5
Overview .................................................................................................................................................... 5
Intended Audience .................................................................................................................................... 5
Glossary ........................................................................................................................................................ 6
Rule, Validation, Maintenance Forms ........................................................................................................... 7
Business Process Introduction .................................................................................................................... 8
Ordering a HireRight Report from YourFuture ............................................................................................ 8
Inviting Applicant to Complete .................................................................................................................. 9
Example of email sent to applicant: ......................................................................................................... 10
HR Completion of Report .......................................................................................................................... 14
Viewing HireRight Reports from YourFuture ............................................................................................... 16
Additional Information .................................................................................................................................. 17
Navigating HireRight Enterprise .................................................................................................................. 18
Portals ........................................................................................................................................................... 18
Workspace Tabs .......................................................................................................................................... 18
Sub Tabs ..................................................................................................................................................... 18
Smart Fields ................................................................................................................................................. 19
Required Fields ............................................................................................................................................ 19
Screening Manager Toolbar, Tooltips, and Right-click Menu Options ................................................... 19
Screening Manager Toolbar ......................................................................................................................... 19
Tooltips ...................................................................................................................................................... 20
Right-click Menu Options .......................................................................................................................... 21
Alerts ............................................................................................................................................................. 21
Flagging ....................................................................................................................................................... 23
Smart Search ............................................................................................................................................... 23
Logging on to HireRight Enterprise ............................................................................................................ 24
Accessing HireRight ..................................................................................................................................... 24
Passwords .................................................................................................................................................... 24
Changing Passwords ..................................................................................................................................... 24
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forgotten Password</td>
<td>24</td>
</tr>
<tr>
<td>User Information</td>
<td>25</td>
</tr>
<tr>
<td>Editing User Information</td>
<td>25</td>
</tr>
<tr>
<td>Ordering Background Requests</td>
<td>26</td>
</tr>
<tr>
<td>Current SDBOR Packages</td>
<td>26</td>
</tr>
<tr>
<td>Ordering a Request</td>
<td>27</td>
</tr>
<tr>
<td>HR Completion of Background Form</td>
<td>29</td>
</tr>
<tr>
<td>Applicant Completion of Form</td>
<td>30</td>
</tr>
<tr>
<td>International Orders</td>
<td>31</td>
</tr>
<tr>
<td>Extending a Request</td>
<td>32</td>
</tr>
<tr>
<td>Viewing and Understanding Background Reports</td>
<td>32</td>
</tr>
<tr>
<td>Receiving Report Notification</td>
<td>33</td>
</tr>
<tr>
<td>View a Report in HireRight</td>
<td>33</td>
</tr>
<tr>
<td>Understanding the Report</td>
<td>34</td>
</tr>
<tr>
<td>Report Toolbar</td>
<td>34</td>
</tr>
<tr>
<td>Letters</td>
<td>34</td>
</tr>
<tr>
<td>Report Summary Tab</td>
<td>34</td>
</tr>
<tr>
<td>Summary Table Information</td>
<td>35</td>
</tr>
<tr>
<td>Report Details Tab</td>
<td>36</td>
</tr>
<tr>
<td>Searching, Sorting and Filtering Requests</td>
<td>36</td>
</tr>
<tr>
<td>Using Search</td>
<td>36</td>
</tr>
<tr>
<td>Using Smart Search</td>
<td>37</td>
</tr>
<tr>
<td>Sorting Requests</td>
<td>37</td>
</tr>
<tr>
<td>By Status</td>
<td>37</td>
</tr>
<tr>
<td>By Recruiter</td>
<td>37</td>
</tr>
<tr>
<td>By Time</td>
<td>38</td>
</tr>
<tr>
<td>Request Number Prefixes</td>
<td>38</td>
</tr>
<tr>
<td>Actions</td>
<td>38</td>
</tr>
<tr>
<td>To perform an action:</td>
<td>39</td>
</tr>
<tr>
<td>Editing a Report</td>
<td>39</td>
</tr>
<tr>
<td>Viewing/Adding Reviewer’s Comments</td>
<td>39</td>
</tr>
<tr>
<td>Downloading a PDF Version of a Report</td>
<td>40</td>
</tr>
</tbody>
</table>
Letters and Forms ........................................................................................................................................... 40
FCRA Compliance Letters .............................................................................................................................. 40
Pre-adverse Action Communication ............................................................................................................... 40
Adverse Action Communication .................................................................................................................... 41
Printing Letters ............................................................................................................................................. 41
Reporting and Adjudication Services ............................................................................................................ 41
Summary Discrepancy Reporting .................................................................................................................... 41
Discrepancy Flags ......................................................................................................................................... 41
Discrepancies and Their Meanings ................................................................................................................... 42
Adjudication Services ........................................................................................................................................ 47
Adjudication Criteria ........................................................................................................................................ 47
  Employment Adjudication Criteria .................................................................................................................. 47
  Education Adjudication Criteria ...................................................................................................................... 48
  Background Check Findings ............................................................................................................................ 48
  Motor Vehicle Records Adjudication Criteria .................................................................................................. 48
  Drug Screening Adjudication Criteria ............................................................................................................ 49
Changing Adjudication Status ............................................................................................................................ 49
Using Management Reports .............................................................................................................................. 52
  Accessing Management Reports ..................................................................................................................... 52
  Management Reports Main Menu .................................................................................................................. 52
  Custom Reports ............................................................................................................................................... 52
  General Reports ............................................................................................................................................... 52
Report Delivery Settings ................................................................................................................................... 55
  To change Report Delivery Settings ................................................................................................................ 55
Report Settings ................................................................................................................................................... 55
Filters ................................................................................................................................................................. 55
Run Report Link ............................................................................................................................................... 56
  Send Link .................................................................................................................................................... 56
  Schedule Link ............................................................................................................................................... 57
  Export Link .................................................................................................................................................. 58
Configuring Management Reports .................................................................................................................... 58
  Setting Up Management Reports ................................................................................................................... 58
Introduction

HireRight Enterprise is a platform for effectively managing your employment background and drug screening programs. Powered by Web 2.0 technologies, it brings all screening activities, tasks and tools together in one location, making the management of your screening program easier and more efficient than ever before.

Overview

HireRight offers a number of services, the services covered in this guide and accessed through the Internet include:

- Screening Manager (Dashboard) – This is where you’ll spend most of your time in HireRight Enterprise, managing your background and drug screening program. How to create new Requests, use Alerts, and other information about the Dashboard is provided.
- Employment Applications – Click this link to access the Employment Application Solution (EAS).
- Employment Screening, Background Requests - Click to open a new workspace with a list of requests.
- Management Reports – Click to view, print, and download both summary and detailed information regarding your account.
- Setup – Click to manage user passwords and access administrative setup tools for features such as your account’s Flex Fields.
- Training & Docs – Click to access HireRight’s online training resources and documentation (such as this User Guide).
- Resources – Click to view disclosure and consent forms as well as other documents that may assist you with understanding the background screening process.
- Help - View HireRight Enterprise version information, and create and track Customer Support tickets.

Intended Audience

This manual is intended for use by human resources.
A glossary can be found in the HireRight Resources tab.

1. Login to HireRight
2. Select Resources from the left-hand column
3. Select Training and Documentation
4. Select the Glossary you need to reference
   a. Glossary for Account – Account terms and definition of features
   b. Glossary: Core Products – Product definitions
   c. Glossary: for Public Research – Terms for criminal records results
Rule, Validation, Maintenance Forms

There are no rule, validation or maintenance forms used in this manual.
Business Process

Introduction
In this User Guide, you’ll learn how to:

- Navigate the user interface
- Get started ordering
- Interpret report results
- Order and view reports through YourFuture

Ordering a HireRight Report from YourFuture

1. The Hiring Manager will submit the Hiring Proposal and once the offer has been accepted they will change the status to “Offer Accepted”.

2. Institutional HR will receive an email stating that the offer has been accepted and to login to YourFuture to review the applicant.
   a. This link is ONLY seen by INST HR and BOR HR user types in YourFuture
   b. Ordering the HireRight report link is only available at “Conditionally Hired”

3. Click on “Order HireRight Report”

4. When the HireRight screen opens, you can then choose your package or ala carte items, NEXT.
   a. If you choose Add-On Services in addition to the package there will be additional charges for each item added (Please see the Price List in HireRight for the costs)
5. Select the completion option
   a. Complete missing information myself-this will allow you to complete the background check
   b. Invite Applicant to complete-This will allow you to notify the applicant that they need to login to complete the report

Inviting Applicant to Complete

1. The applicant name will auto-populate
   a. Verify the email address
   b. Select the letter you wish to send, there is a default one that can be edited
2. Submit – an email will then be sent to the applicant to login and fill out the information
**Example of email sent to applicant:**

Dear Applicant Name,

To assist in completing the Test - PeopleAdmin Child 14, background verification process, please go to the website address listed below. Once there, enter the login and unique password (included below). Submit the information, and you will be logged in to the Test - PeopleAdmin Child 14, online background form. Once you have logged in, please complete and submit the information forms.

Web Address: https://ows01.hireright.com/in.html?key=0DC8A87D41C668197B8D1D788C0871D0
Login: kayla.bastian@sdbor.edu
Password: 8a53daeb

Our objective is to complete this process quickly. Please make every effort to accurately provide all of the requested information. An associate from HireRight, our background verification partner, may contact you for additional information during the verification process. Please return HireRight's call or email promptly to ensure that a fast and accurate verification enables you to begin work as scheduled. If you have any questions in completing the online form, please contact HireRight Customer Service. Customer Service is available 24 hours a day, 5 days a week beginning Sunday 5 p.m. through Friday 9 p.m. Pacific Time (GMT -8). You can call them at:

3. The applicant will then login and finish the report, the following is what they are required to complete:
4. The applicant will be prompted to electronically sign for authorization of the background check, a complete disclosure is provided for the applicant to review:
5. The applicant can then view the signed document prior to submitting.

![Signed Document](image1)

Continue to the next page to complete the form

6. Once the applicant submits, HireRight begins processing the request.

7. INST HR can check the status of the report by clicking on “View HireRight Report”
8. INST HR will also receive email notifications regarding the background check.
9. If the background check comes back with no discrepancies, then the status of the applicant can be changed to “Hired”.
   a. Click on “Change Status”
   b. Choose “Hired” from the drop down list
   c. Continue to Next
   d. Save Status Changes
10. If the background check comes back with positive results and the offer is withdrawn, then you can change the applicant status to “Not Hired”
    a. Click on “Change Status”
    b. Choose “Not Hired” from the drop down list
    c. Select “Conditional Offer Withdrawn” from the Reason drop-down list
    d. Continue and Save
HR Completion of Report

If HR chooses to fill out the report with the applicant information:

1. Verify the information that auto-populates from YourFuture, Next.

2. Add any additional counties and cities for the criminal search

3. Verify the applicant social security number or add it if it is not listed and insert the applicant date of birth
4. Review the summary input to make sure you have the information correct
5. Review and Submit the background form
   a. Verify that you have the applicant’s consent form or will have it prior to the request
   b. Print the form to have the applicant to sign
   c. Email the consent form to the applicant

6. Once the background check is completed, follow the same procedure in YourFuture as outlined previously by changing the applicant status to “Hired” or “Not Hired”.
Viewing HireRight Reports from YourFuture

1. Access the job posting and find the correct applicant
2. Click on “View HireRight Report”
3. A window will open showing the progress of the report.
Additional Information

It is important to remember that any applicant in YourFuture that has a status of “Hired” or “Not Hired” will have a link to “View HireRight Report”, regardless if a report has been submitted or not. If you click on “View HireRight Report” and there is not a report submitted you will get the following message:

There is no order available for the candidate. You can view the report once the background check request has been submitted.

Go Back

If you have already submitted a report and click to Order another HireRight report, you will get the following message:
Navigating HireRight Enterprise

Portals
HireRight Enterprise leverages the power of portals to organize related tasks and information around your screening program. Screening Manager’s Background & Drug Requests, Announcements, Alerts, Request Summary, and Total Background Requests Processed are all portals available to you in HireRight Enterprise.

Workspace Tabs
You can now access multiple workspaces simultaneously. The Screening Manager (Dashboard) is your primary workspace, but you can open additional workspaces (such as multiple Searches) and toggle between them by clicking the workspace’s tab (for example, the New Request tab shown below). Additional workspaces open to the right of Screening Manager in tabs. You can navigate back and forth between multiple tabs as you work, and open and close them as necessary.

Sub Tabs
Within each workspace tab, additional tabs are sometimes used to organize information. For example, in the Screening Manager tab, requests are organized by status (In Progress, Completed, etc.) in tabs. You can click each column heading to re-sort the results alphabetically:
Smart Fields

Smart fields are fields that help you input information as you type. For example, the City field of the New Request form pre-populates as you type, suggesting City names with the associated State:

When you select a City from the list, the system populates the State field automatically:

Required Fields

- Fields marked with red asterisks are required. As long as these fields are completed, your order will be complete. If you do not complete a required field, you will be prompted to do so.
  - Input fields are not case-sensitive.
  - Press the TAB key to move the cursor to the next input field. Press SHIFT + TAB to move the cursor back to the previous field.
  - It is recommended that you enter text in upper and lower case so that information will appear in title case when generating emails or letters.

Screening Manager Toolbar, Tooltips, and Right-click Menu Options

The Toolbar provides quick access to all the main functions of your screening program. To use the options, click once on a request in the list.

Screening Manager Toolbar

- New - Creates a new request.
- Print - Prints the selected report.
- Download - Allows you to save the selected report file to your desktop.
• **Note** - Allows you to add Reviewer Comments to the selected report.

• **More Options**: This context-sensitive drop-down menu provides different options depending on the status of the selected request. For example, if the request is Pending Adjudication, **Adjudicate** is one of the available options:

![More Options Menu]

• Other options may include: **View Report**, **Extend**, and **Re-assign**.

**Tooltips**

When you hover your mouse pointer over a row in Screening Manager, a tooltip appears with helpful information about the item:

![Screening Manager]

Information in the Tooltip includes:

• **Date Completed** - The date the request was completed by HireRight.
**Right-click Menu Options**

The right-click menu options contain all the actions available in the Toolbar, as well as additional actions such as Adjudicate (when applicable):

**Alerts**

HireRight Enterprise provides a simplified, centralized way to view and act on system alerts. If an alert requires your immediate action, it is displayed in the **Action Requests** tab:
To see the full text of the alert right away, hover your mouse over the alert title. The full text is displayed in a pop-up window:

![Alert Pop-up Window](image)

To see the alert details, simply double-click the title text, and a new tab opens next to Screening Manager. You can open multiple alerts and toggle between the tabs as necessary:

![Alert Details Tab](image)

If the alert is for your information only, and does not require any action on your part, it is displayed in the Information-only Alerts tab:

![Information-only Alerts Tab](image)
Flagging
If you want to flag a specific request, you can do so by right-clicking in the column to the left of the applicant’s first name. The Flag menu is displayed, choose the flag you want and click on it, it then appears next to that applicant in the list.

Smart Search
HireRight Enterprise includes a powerful Search tool. You can quickly search for applicant names, personal IDs, or order numbers. The Search tool is located in the upper left corner of the screen. Type the search criteria and click the magnifying glass icon or ENTER.

If you don’t know exactly how a person’s name is spelled, you can turn Smart Search on and the system will show results similar to the name you enter by clicking the Smart Search checkbox.
Logging on to HireRight Enterprise
Before you can order services from HireRight, you must first access our web site and log into the HireRight system.

Accessing HireRight
1. Enter the following URL in your browser: http://www.hireright.com
2. Click Login in the upper right corner of the page.
   a. If a Security window appears, click OK.
3. Enter your Company ID and press Tab
   a. Company IDs are as follows
      i. SDBOR – SDBOR
      ii. BHSU – SDB05
      iii. DSU – SDB06
      iv. NSU – SDB01
      v. SDSMT – SDB02
      vi. SDSU – SDB03
      vii. USD – SDB04
      viii. SDSBVI – SDB07
      ix. SDSD – SDB08
4. Enter your Username and Password.
5. Login.

Passwords
If you are a first-time user, you may need to change your account password after logging into the system. You can do this by using the “Change Password” feature. Use this feature whenever you wish to change your password.

Changing Passwords
1. From the HireRight Enterprise Menu, click Setup.
2. Click Change Password.
3. In the first field, enter your Current Password.
4. Enter your New Password.
5. Re-enter the password in the Confirm New Password field.
6. Do one of the following:
   a. To change your password, click Submit.
   b. To remove the entries in the Change Password screen, click Clear.
   c. To exit this screen without saving your changes, click Cancel.

Forgotten Password
1. At the HireRight Customer Login page, click the Forgot your password? link.
2. At the prompt, type the answer to the secret question you specified when you first setup your HireRight account, and click the Email New Password button.
3. You can also
User Information

If you would like to edit other information on your personal account, use the “Users” feature. There are three types of users in the HireRight system:

1. **HR Managers**: Managers can create, edit, and delete other users. Additionally, they grant “permissions” to users. To use the different functions within the HireRight system, you must have permission. For example, to order a credit report on a candidate, you must have the specific permission to do so.

2. **HR Administrators**: Administrators have the ability to edit their own information. Additionally, they may use the HireRight system depending on the permissions the Manager granted. They may also edit or delete users who are designated as clerks.

3. **HR Clerks**: Clerks may edit their own personal information and access any HireRight function for which they have permission.

Editing User Information

1. From the HireRight Enterprise Menu, click Setup.
2. Click Setup Users.
3. Select the user you want to edit and click GO next to the Edit selection.
4. Enter or edit any personal data on the form. You must complete the fields with the red asterisks (the required fields) to proceed. The column titled “Permissions” displays all of the reports and functions to which you have access. You cannot change your permissions. Your manager sets your permissions.
5. Click Edit Data when done.
Ordering Background Requests

Each time you place an order, you will be prompted to choose which package to order and enter the required data on a per-product basis. This ordering method is recommended if you will be ordering a number of individual customized requests for your applicants. When initiating a new request, you may create an a la carte “Custom Request” or choose from one of the predefined packages. Once the applicant submits the completed form(s), you will automatically be notified by email, and the request status will change and be displayed in the Screening Manager Dashboard.

Current SDBOR Packages

**Basic Criminal Package w/o Employment**
- Criminal Felony & Misdemeanor unlimited
- National Criminal Search
- National Sex Offender Registry 1
- SSN Trace 1

**Basic Criminal Package w/ MVR**
- Criminal Felony & Misdemeanor unlimited
- MVR 1
- National Criminal Search 1
- National Sex Offender Registry 1
- SSN Trace 1
**Recommended Basic Criminal Package**
Criminal Felony & Misdemeanor unlimited
Employment Report 3
National Criminal Search 1
National Sex Offender Registry 1
SSN Trace 1

**Recommended Basic Criminal Package w/ Credit**
Criminal Felony & Misdemeanor unlimited
Employee Credit
Employment Report
National Criminal Search
National Sex Offender Registry

**Recommended Basic Criminal Package w/ MVR**
Criminal Felony & Misdemeanor unlimited
Employment Report
MVR
National Criminal Search
National Sex Offender Registry
SSN Trace

**Recommended Professional Level Package**
Criminal Felony & Misdemeanor unlimited
Education Report
Employee Credit
Employment Report
MVR
National Criminal Search
National Sex Offender Registry

**Ordering a Request**
1. Click **New** on the Screening Manager toolbar. A new tab opens next to Screening Manager, containing a New Request.
2. Choose the package you want to order from the **Select Package** drop-down menu.
   a. Click the Details link to see descriptions of each service in the package.
3. Below Order Details, there is a list of Add-on services. You can optionally add any of these to your order. Simply click them in the list and they are added.
   a. You can change the number of products using the number control:
   b. PLEASE NOTE: The Add-on services do add on additional charges, these are NOT included in the package price

4. Click Next.
5. The **Select Form Completion Option** screen is displayed.
   a. Complete the forms yourself, or send an email to the applicant and letting the applicant complete the forms.
   b. You can also specify a Hiring Manager (name and email address) who you want to receive notifications about the request.

5. Choose the option you want and click **Next**.

**HR Completion of Background Form**

1. Fill out the form, following the instructions on the page.
2. Check the request to make sure it is not a duplicate, and do one of the following:
   a. Click **Next** to submit the request.
   b. Click **Cancel & Discard** to delete it
3. If you would like a copy of the background report emailed to you once it is completed, click the checkbox.

4. Click **Next**.
   a. If the applicant has already signed and dated the Disclosure and Authorization form, choose the first radio button.
   b. If you need to get the applicant’s consent, choose the second radio button. The screen changes so you can provide the contact information

5. Fill out the information to send an email to the applicant. **Submit**.
Applicant Completion of Form

If you have chosen a package and want the system to send the applicant an email to let him or her complete the form follow this procedure:

1. Click the “Email applicant...” radio button as shown below.
2. Enter the applicant’s first and last name, and a valid email address.
3. If you want a Hiring Manager to receive notifications about the request, enter their first and last names, and a valid email address.
4. Choose the email message you want sent to the applicant.
   a. You can click the Preview link to see the text of the message
5. Check the **Send me a copy of this e-mail** checkbox to have the system send you a copy of the e-mail the applicant will receive. **Next.**

6. Close the tab to return to the Screening Manager dashboard.
7. Click the **Not Submitted** tab to see the status of your new request immediately:

8. The email includes a URL, login name, and password. The applicant will load the URL in a browser and use the provided login credentials to fill out the form and submit to HireRight.
   a. When the applicant has completed the form, the status of the background check will change from **Not Submitted** to **In Progress**.

**International Orders**
If the applicant currently resides in a country outside the United States, the ordering process is enhanced such that the appropriate consent information is displayed.

1. Click **New** as before.
2. Choose to complete the form yourself or email the applicant.
3. Choose the applicant’s current country of residence.
4. Choose the Privacy Statement language from the drop-down menu.
   a. A PDF is displayed. Read the statement and either close or save the document.
5. Click **Proceed** and complete the form as normal.
6. At the end of the process, the non-US consent form is displayed, select the language from the drop-down menu and view the statement.
7. You may need to provide other information. The Additional Information screen may appear if this is the case.
8. Submit.

**Extending a Request**

On occasion, you may have an applicant for whom you need to order more background requests. Or, you may need to run a report a second time. In either case, you need to “extend” the request.

1. Locate the request you want to extend in the Screening Manager dashboard and click the row once to select it.
2. Right-click the row and choose Extend from the menu or choose Extend from the More Options menu.
3. Proceed with ordering additional products.

**Viewing and Understanding Background Reports**

Once HireRight completes a background report, you will receive an email notification and you may view the results directly from your HireRight account.
Receiving Report Notification
HireRight sends the requester an email notification when the background verification is complete.

View a Report in HireRight

1. To view a report’s progress in HireRight, click on the “In Progress” tab

2. Here you can view the progress of each report you currently have in progress, it shows the name, request number, status (% completed) and the date submitted.

3. If you click on the applicant name, it will give a report summary including the results of each verification in the background check.

4. The “Report Details” tab gives a detailed report of the verification, including references to all correspondence received in the process.

5. The “Applicant Data” tab gives a summary of the applicant’s information for each of the area’s checked in the report.

6. You can also view the completed background check summaries by opening the “Completed” tab.
Understanding the Report

Report Toolbar
The Report Toolbar contains the following options:

- **Re-Assign**: Click this button to re-assign the selected report to a different recruiter.
- **Print**: Click this button to print the selected report.
- **Download**: Click this button to download a PDF of the report to your computer.
- **Note**: Click this button to add a note to the report. Any notes associated with the report will be displayed in the Note dialog. You can use these notes internally during the background check process. Notes are not included in the final report. You can also print the notes associated with the report.
- **Letters**: Click this button to choose a letter to preview and send to an applicant.
- **Live Chat**: Click this button to open a real-time chat session with a HireRight customer service representative.

Letters
When you click Letters, the following menu options are displayed:

1. Choose the type of letter you want to email.
2. Enter the applicant’s email address. You also have the option of CC:ing others as required.
3. Click **Preview** to see a preview of the email that will be sent.
4. Click **SEND**. A confirmation dialog is displayed.

Report Summary Tab
This tab contains information about the report. The Summary Information section includes the following information:
• **Viewed:** Indicates this report has been viewed. Other statuses might be “Sent to Applicant” or “Complete”.

• **Request #:** The HireRight identification number assigned to this report’s background request.

• **Requested By:** The name of the person who ordered the background request.

• **Adjudication:** The Adjudication Status of the request.

### Summary Table Information

<table>
<thead>
<tr>
<th>Product</th>
<th>Verification</th>
<th>Result</th>
<th>Reviewer’s comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criminal Felony &amp; Misdemeanor</td>
<td>Houston, Harris, TX, USA</td>
<td>Complete - No Court Record Found</td>
<td>Add Comments</td>
</tr>
<tr>
<td>SSN Trace</td>
<td>12345</td>
<td>Complete - No Data Found</td>
<td>Add Comments</td>
</tr>
<tr>
<td>Employment Report</td>
<td>ABC Warehouse</td>
<td>Complete - Data Verified</td>
<td>Add Comments</td>
</tr>
<tr>
<td>Education Report</td>
<td>University of Texas</td>
<td>Complete - Discrepancy</td>
<td>Add Comments</td>
</tr>
</tbody>
</table>

• **Product:** A list of the individual background verification products in the report.

• **Verification:** What specifically was verified.

• **Result:** The result of the verification.

• **Reviewer’s comments:** If the HireRight verifier had any comments during the verification process, they are listed here.
  - You can also click the **Add** icon to include your own comments. The comments can be included or excluded from the printed report.
**Report Details Tab**
Click the Report Details tab to view the entire report.

**Company Information**
This section contains company information for both your company and HireRight. Additionally, the requester is listed along with a HireRight representative and his/her contact information. The requester information also includes the date of the request as well as the completion date for the entire report.

**Applicant’s Personal Information**
This section includes the applicant’s name, SSN, and other personal identification information.

**Education**
This section includes education information, it lists who verified attendance, dates attending, major/area of study, degree received or hours completed, date that the degree was received. Notes can be added by the HireRight reviewer in the Comments section.

**Employment**
This section details the employment history of the applicant. Each provided employer is listed, along with the person at each company verifying the information. The layout of the Employment report is the same as the Education report.

**SS Trace/Credit Report**
The next section is the Social Security Trace/Credit Report. Here, HireRight verifies that the Social Security Number given by the applicant matches the name. If a credit history has been ordered on the applicant, the information will be shown below the Social Security Trace results. Information shown on the Credit History includes summary and detail information on public records, collections, negative accounts, trade accounts, satisfactory accounts, and inquiries made on the account.

**Court Records**
The Courts Records section displays if the applicant has any criminal convictions. The standard research period is for seven years.

**Footnotes Area**
In many of the areas on the report, there may be notes. For this applicant, a few areas indicate a 1. The footnotes at the bottom of the report include all notes. It also contains a legal notice.

**Searching, Sorting and Filtering Requests**
You can narrow down the number of requests displayed in a list by searching, sorting, or filtering.

**Using Search**
When searching reports, you may search based on:
- **First Name** — The applicant’s first name.
- **Last Name** — The applicant’s last name.
- **SSN** — The applicant’s Social Security Number (or Personal ID)
- **Request #** — The number assigned by HireRight upon request submission.
To use Search:
1. In Screening Manager, click once in the For: field of the SEARCH box:
2. Enter one of the following
   a. the applicant’s first or last name
   b. the applicant’s Social Security Number
   c. the request number HireRight assigned at the time of submission
3. Click the Search button, or press Enter.

Using Smart Search
Smart Search helps you find reports when you don’t know the person’s entire first or last name, Social Security Number, or the entire Request #.

To use Smart Search:
1. On any open Search tab, click the Smart Search checkbox:
2. Enter the information you have (partial name, SSN, or Request #) in the Search For: field and click the Refresh button:

Sorting Requests

By Status
Requests are organized by Status in Screening Manager. Click on the appropriate tab to view only the requests with a given status. The possible statuses include:

Status Definitions
- Not Submitted: A request has been created but has not been submitted for completion.
- In Progress: The requester has sent an email to the applicant requesting that s/he complete the request form. This status further indicates that the applicant has not yet filled in the request information.
- Pending Applicant: The applicant has filled out part of the application but has not yet submitted it.
- Submitted / X%: A request has been created and submitted. The percentage indicates the level of completion for the report.
- Complete: The submitted report is 100% complete.
- Viewed: The requester has viewed a complete report.
- Cancelled: The requester has cancelled the request.

By Recruiter
You can choose to view only those requests created by a particular recruiter. Click the Show requests for drop-down menu and choose the recruiter you are interested in
By Time
You can also choose to view only reports from a set period of time. Your options include viewing reports that have been created in the last 24 hours, 7 days, 30 days, or 90 days.

Request Number Prefixes

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DE</td>
<td>Requests entered by HireRight data entry team.</td>
</tr>
<tr>
<td>WE</td>
<td>Requests entered through the New Request function on the Background Verifications page of the HireRight system.</td>
</tr>
<tr>
<td>WR</td>
<td>Requests entered through the Quick Order function on the Background Verifications page of the HireRight system.</td>
</tr>
<tr>
<td>WA</td>
<td>Requests entered by applicants through Applicant Password function on the Background Verifications page of the HireRight system.</td>
</tr>
<tr>
<td>WI</td>
<td>Requests generated from a full-scale integration from the client applicant tracking system.</td>
</tr>
</tbody>
</table>

Actions
For every status listed, there is a corresponding action.

<table>
<thead>
<tr>
<th>Action</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>View or add a comment to a background report.</td>
</tr>
<tr>
<td>Consent Form</td>
<td>Download a copy of the consent form in PDF format.</td>
</tr>
<tr>
<td>Delete (Draft or Viewed request only)</td>
<td>Draft will be deleted from the system. Viewed reports will be moved to HireRight archives.</td>
</tr>
<tr>
<td>Download PDF</td>
<td>Download a copy of the background report in PDF format</td>
</tr>
<tr>
<td>Edit (Draft request only)</td>
<td>Change any information in the request including adding, deleting, or changing subrequest information.</td>
</tr>
<tr>
<td>Extend (Completed or Viewed requests only)</td>
<td>Create a new request for the same applicant. The applicant will have the same request number and extension. See “Extending a Report” on page 36 for more information.</td>
</tr>
<tr>
<td>Reassign Recruiter</td>
<td>Assign another recruiter to a background request.</td>
</tr>
<tr>
<td>View</td>
<td>View the information on the report to date</td>
</tr>
</tbody>
</table>
To perform an action:
1. Click once on the applicant request in Screening Manager and select the desired action from the More Options drop-down menu

Editing a Report
If you have the required permissions and your request has a Draft status, you may select Edit to add, delete, or change information before a form is submitted to HireRight.

1. Select Edit from the More Options drop-down menu. The system redisplay the background form at the point where you left off.

Viewing/Adding Reviewer’s Comments
You can add specific comments or notes directly to a report. The notes are not private to the individual user and will be displayed to anyone accessing the report. This feature can be used if:

- More than one person who will review the report (e.g., hiring manager, HR manager) and wish to capture comments made by members of your internal team regarding this report.
- To keep track of interview dates and times.
- To document when letters and materials have been sent to an applicant.

To view or add comments:
1. In Screening Manager, click once on the request you are interested in.
2. Do one of the following:
   a. Right-click the row and choose Note from the menu:
   b. Click the Note button on the toolbar:
3. To enter a comment, click Add New Comment.
4. Type in your comment and click Save.
5. To print existing comments, click Print Page.
Downloading a PDF Version of a Report

Downloading a report in PDF format enables you to attach the report to an email.

1. Click Download on the Toolbar, or right-click the request in Screening Manager and choose Download from the menu.
2. Click Continue.
   a. If there are Reviewer’s Comments, the system will display the following screen:

3. Click Cancel to return to the report, or Click Continue to download the report with the selected option.

Letters and Forms

**FCRA Compliance Letters**

HireRight provides online templates of the following applicant letters in compliance with FCRA guidelines. All letters are populated with necessary applicant information, and can easily be printed and sent.

**Pre-adverse Action Communication**

These documents are to be sent to the applicant if information found in the background report may affect your hiring decision:

- Report Letter
- Report for Applicant
- Summary of Consumer Rights Under the FCRA
Adverse Action Communication
The following Adverse Action letters are to be sent to the applicant when a negative employment decision is based wholly or in part on the results of the background verification:
- Position not offered
- Position offered, but Applicant did not start work

Printing Letters
If you plan to print letters and forms directly from the HireRight system, you need to remove header and footer text.

To remove header and footer text:
1. Click File on the menu bar.
2. Select Page Setup.
3. Highlight and delete the text for the Header and Footer text boxes. OK.

To print a letter:
1. Select the link for the appropriate applicant letter.
2. Right click on the letter text and select Print from the menu
3. You may also copy the letter and send it to the applicant via email or copy the letter text and place it in your own company letterhead format.

Reporting and Adjudication Services
Managing multiple applicants throughout your company's hiring process has been made easier with HireRight Reporting Services. Any time you log on to the Results page, you can get a quick glance at which applicant requests may contain adverse records. Depending on your account setup, you will have one of the following “at a glance” views:
- Summary Discrepancy Reporting
- Adjudication Services

Summary Discrepancy Reporting
Summary Discrepancy Reporting is designed to allow you to easily see which reports have come back “clear” and which reports have come back with potential “hits” or discrepancies.

Discrepancy Flags
When verified items in an applicant’s background do not match the provided information, a discrepancy is created. These appear as flags in different areas of the system. The Report Summary tab allows you to get a snapshot of sub-request status as well as which subrequests came back with a “hit” or potential discrepancy, and which ones came back clear.

Report Summary tab in the Background Report:
Hover your mouse pointer over a subrequest result to see a pop-up of the result detail information (as shown above).
### Discrepancies and Their Meanings

The following table explains which requests are covered under summary discrepancy reporting, what the possible discrepancies are, and further detail on what the discrepancies mean.

**Note:** “Discrepancy” does not necessarily indicate adverse information; however, it is a signal that the information requires further review.
<table>
<thead>
<tr>
<th>Subrequest</th>
<th>Clear Request</th>
<th>Possible Discrepancies</th>
<th>Discrepancy Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcohol Testing</td>
<td>Complete – Negative</td>
<td>1. Closed - Inadequate Amount of Breath</td>
<td>1. Results could not be obtained.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Complete – Positive .02&lt;x&lt;.04</td>
<td>2. Positive result found.</td>
</tr>
<tr>
<td>Court Records</td>
<td>Complete – No Court Record Found</td>
<td>1. Complete – Court Record Found</td>
<td>1. Search returned a court record.</td>
</tr>
<tr>
<td>Credit</td>
<td>Complete – Data Found</td>
<td>1. Closed – No Data Found</td>
<td>1. No credit history found associated with the name and SSN provided.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Closed – No Data Returned</td>
<td>2. No data was returned from clinic partner probably because the applicant did not complete the screening process.</td>
</tr>
<tr>
<td>Subrequest</td>
<td>Clear Request</td>
<td>Possible Discrepancies</td>
<td>Discrepancy Detail</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Drug</td>
<td>Complete – Negative Result</td>
<td>1. Complete – Positive Result</td>
<td>1. Positive result found for 1 or more of the substances tested</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Closed – Diluted Sample</td>
<td>2. Nonpositive test; inconclusive due to diluted nature of sample</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Closed – No Data Returned</td>
<td>3. No data was returned from our drug screen partner probably because the applicant did not complete the screening process</td>
</tr>
<tr>
<td>Employment</td>
<td>Complete – Data Verified</td>
<td>1. Complete – Discrepancy</td>
<td>1. Data supplied by applicant is inconsistent with employer-supplied information (e.g., at least 90-day combined gap between reported and actual start/end employment dates; job titles don’t match, etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Closed – Unable to Verify</td>
<td>2. Employment information could not be confirmed (e.g., company did not respond, went out of business, etc.)</td>
</tr>
<tr>
<td>Subrequest</td>
<td>Clear Request</td>
<td>Possible Discrepancies</td>
<td>Discrepancy Detail</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Education</td>
<td>Complete – Data Verified</td>
<td>1. Complete – Discrepancy</td>
<td>1. Data supplied by applicant is inconsistent with school-supplied information (e.g., at least 90-day combined gap between reported and actual start/end dates, graduation date inconsistent; degrees don’t match, etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Closed – Unable to Verify</td>
<td>2. Education information could not be confirmed (no response, school not found)</td>
</tr>
<tr>
<td>Healthcare Sanctions</td>
<td>Complete – No Data Found</td>
<td>1. Complete – Data Found</td>
<td>1. A record was found. This information requires review.</td>
</tr>
<tr>
<td>Interpol Criminal Search</td>
<td>Complete – No Record Found</td>
<td>1. Complete – Court Record Found</td>
<td>1. Search returned a court record.</td>
</tr>
<tr>
<td>MVR</td>
<td>Complete – No Violation Data Found</td>
<td>1. Complete – Violation or Accident Data Found</td>
<td>1. Motor Vehicle Records indicate accidents or violations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Closed – Invalid License</td>
<td>2. No record of a driver’s license based on the number provided</td>
</tr>
<tr>
<td>Medical Clearance</td>
<td>Complete – No Data Found</td>
<td>1. Complete – Data Found</td>
<td>1. Record was found.</td>
</tr>
<tr>
<td>Subrequest</td>
<td>Clear Request</td>
<td>Possible Discrepancies</td>
<td>Discrepancy Detail</td>
</tr>
<tr>
<td>--------------------</td>
<td>--------------------------------</td>
<td>--------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Military Records</td>
<td>Complete – Data Verified</td>
<td>1. Complete – Discrepancy</td>
<td>1. Data supplied by applicant is inconsistent with military-supplied information (e.g., at least 90-day combined gap between reported and actual start/end dates, rank inconsistent, etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Closed – Unable to Verify</td>
<td>2. Military service information could not be confirmed (no response, data not found)</td>
</tr>
<tr>
<td>National Criminal DB Search</td>
<td>Complete – No Court Record Found</td>
<td>1. Complete – Court Record Found</td>
<td>1. Search returned a court record.</td>
</tr>
<tr>
<td>Newspaper/ Periodical</td>
<td>Complete</td>
<td>1. Complete – Data</td>
<td>1. Information has been found in the publication search. This information requires review.</td>
</tr>
<tr>
<td>Professional License</td>
<td>Complete – Data Verified</td>
<td>1. Complete – Verified with Discrepancies</td>
<td>1. License verified but date, certificate, or other information is inconsistent with data supplied</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Complete – License Expired or Suspended</td>
<td>2. License expired or suspended</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Closed – Unable to Verify</td>
<td>3. Unable to confirm license information</td>
</tr>
<tr>
<td>Prohibited Parties</td>
<td>Complete – Not in Database</td>
<td>1. Complete – Found in Database</td>
<td>1. Name appears in database</td>
</tr>
<tr>
<td>References</td>
<td>Complete – Data Returned</td>
<td>1. Closed – No Data Returned</td>
<td>1. No response from named reference or reference refuses to answer</td>
</tr>
<tr>
<td>Subrequest</td>
<td>Clear Request</td>
<td>Possible Discrepancies</td>
<td>Discrepancy Detail</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------</td>
<td>----------------------------------------</td>
<td>------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SSN Trace</td>
<td>Complete – Data Found</td>
<td>1. Closed – No Data Found</td>
<td>1. No SSN found (via the credit bureau) associated with the name provided</td>
</tr>
<tr>
<td>Sex Offender Registry</td>
<td>Complete – Not in Registry</td>
<td>1. Complete – Found in Registry</td>
<td>1. Name appears in Sex Offender Registry</td>
</tr>
<tr>
<td>Workers’ Comp</td>
<td>Complete – No Data Found</td>
<td>1. Complete – Data Found</td>
<td>1. Workers’ Comp claims(s) record found</td>
</tr>
</tbody>
</table>

**Adjudication Services**

HireRight performs adjudication for many clients and has developed very flexible systems and processes that can be tailored to a client’s needs.

**Adjudication Criteria**

Below is a sample listing of adjudication criteria. Individual organizations will have different standards based on the types of reports ordered, job types, industry, and company policy.

**Employment Adjudication Criteria**

1. Company name and employee title and dates of employment consistent with those reported (combined 90-day tolerance with start and end date) | Meets Company Standards
2. “Unable to verify” due to lack of employer response | Meets Company Standards
3. “Unable to verify” due to self-employment | Pending
4. “Unable to verify” due to employer found no record | Pending
5. All Others | Pending
### Education Adjudication Criteria

<table>
<thead>
<tr>
<th></th>
<th>Criteria</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Highest degree, area of study, and dates matched</td>
<td>Meets Company Standards</td>
</tr>
<tr>
<td>2.</td>
<td>No degree awarded (highest degree)</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>3.</td>
<td>All Others</td>
<td>Pending</td>
</tr>
</tbody>
</table>

### Background Check Findings

<table>
<thead>
<tr>
<th></th>
<th>Criteria</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>No Criminal Record</td>
<td>Meets Company Standards</td>
</tr>
<tr>
<td>2.</td>
<td>Court Disposition of not guilty, nolle prosse, waived, or dismissed</td>
<td>Meets Company Standards</td>
</tr>
<tr>
<td>3.</td>
<td>Any felony conviction</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>4.</td>
<td>Sale or delivery of drugs</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>5.</td>
<td>Mob action or gang activity (violence)</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>6.</td>
<td>Criminal Conviction/Fraud</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>7.</td>
<td>Computer Crimes: hacking, software infringement</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>8.</td>
<td>Conviction of a single sex crime</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>9.</td>
<td>All Others</td>
<td>Pending</td>
</tr>
</tbody>
</table>

### Motor Vehicle Records Adjudication Criteria

<table>
<thead>
<tr>
<th></th>
<th>Criteria</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>DWI/DUI (2 or more convictions)</td>
<td>Does Not Meet Company Standards</td>
</tr>
<tr>
<td>2.</td>
<td>Traffic or vehicle code violation (3 or more)</td>
<td>Pending</td>
</tr>
<tr>
<td>3.</td>
<td>Accidents (3 or more in the past year)</td>
<td>Pending</td>
</tr>
<tr>
<td>4.</td>
<td>All Others</td>
<td>Meets Company Standards</td>
</tr>
</tbody>
</table>
Drug Screening Adjudication Criteria

<table>
<thead>
<tr>
<th></th>
<th>Positive results</th>
<th>Does Not Meet Company Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Negative results</td>
<td>Meets Company Standards</td>
</tr>
</tbody>
</table>

Changing Adjudication Status
If you have the necessary permissions, you may change the Pending status to either Meets Company Standards or Does Not Meet Company Standards.

To change the adjudication status on the User List:
1. From Screening Manager, double-click the Request you wish to change.
2. On the Report Summary tab, click Edit next to the color-coded Adjudication result.
3. Click the drop-down arrow next to the list box to display a list of criteria.
4. Select a new adjudication result from the list, a reason code (such as MVR), comments and click Submit.
5. The status is updated. Click Close to continue.

Billing
HireRight has a monthly billing period. Each institution has a designated Invoice Recipient, the invoices are sent via email to that designee each month.

Invoices
1. The invoice recipient will receive an email as seen below, with an attached invoice:
2. Click on the blue link “Click Here for Invoice Details” to see the details of the charges, this will open an Excel spreadsheet.
   a. You can view the invoice in three tabs, “By Applicant”, “By Item Type” and “By Transaction” by selecting one of the three tabs on the bottom of the spreadsheet

Additional Charges

**Surcharges:** Surcharges are additional fees that are not included in the package price, they are assessed by some vendors, courthouses, institutions, etc...for providing information. HireRight has an automated process so that when the request is made they automatically pay any applicable surcharges. It is important to be aware that these are additional costs.
**Use Disclosure and Consent Form/E-Signature:** $1.50 is charged if the applicant completes the background request him/herself and uses an electronic signature.

**Accessing Billing in HireRight Portal**

It is also possible to access all invoices directly in HireRight. To do so, please use the following steps:

1. Select “Billing” from the left-hand menu, this will open a new tab
2. You can search by invoice number, reference, keyword or date range, “Go”

   ![Menu](image)

3. Select the way you wish to view the invoice from the Actions dropdown menu
   a. Show Invoice Summary
   b. Show Invoice Detail
4. You can then view the invoices as needed, this allows you to see the history of your charges as well
Queries and Reports

Using Management Reports
Management Reports are available in the HireRight system to give certain users access to analytical data as well as manage your background screening program more effectively.

Accessing Management Reports
Only users who have been given the appropriate permissions have access to the Management Reports available within your account. Management reports are available within your account and allow you to sort and display information contained in the reports within a date range. These reports are available in printer-friendly HTML or Microsoft Excel format for easy downloading. Designated users may run the reports any time they log into the HireRight system.

To access Management Reports:
1. Click Management Reports, Management Reports.
2. Click a report to view report options (such as View, Schedule, and Run).

Management Reports Main Menu
From the Management Reports screen, you see a library of reports for which you have permission to access. Reports fall into two categories: Custom and General.

Custom Reports
The reports listed under this heading have been custom built for customers and uploaded for access only from that account. A custom development fee is charged to develop and maintain these reports.

General Reports
The reports listed under this heading are prebuilt reports created by HireRight and are available to all clients free of charge. HireRight updates these reports as needed and adds new reports to improve the library over time.

<table>
<thead>
<tr>
<th>Account Activity</th>
<th>Detailed account activity within a specified date range. View the specifics of each verification, including recruiter name, estimated costs, and employment application information for accounts that use the Employment Application Solutions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Information</td>
<td>This report is helpful for tracking important information about accounts, listing the account location, code, super user, HireRight customer service representative, and HireRight account manager.</td>
</tr>
<tr>
<td>Adjudication Results</td>
<td>Shows the adjudication results for selected verifications. It includes a listing of all the sub-requests that make up a background verification for better analysis.</td>
</tr>
<tr>
<td><strong>Adjudication Status Summary</strong></td>
<td>Displays the number of requests completed and groups them by adjudication statuses.</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Adjudication Tracking Details</strong></td>
<td>Displays detailed information about adjudication results.</td>
</tr>
<tr>
<td><strong>Adverse Records</strong></td>
<td>Summarizes and details those requests in which adverse records were found. An analysis table shows the summaries and percentage of adverse records returned within the specified date range. The details section shows adverse record details for each applicant whose verification returned a “hit.” All background verifications in this report are consolidated, meaning that if any extensions were created for a given applicant; those results will be included under a single record for the applicant.</td>
</tr>
<tr>
<td><strong>Applicant Information (EEOC)</strong></td>
<td>Displays the status of background verifications and employment applications as well as the applicant’s name, residence, contact information, gender, date of birth, race and ethnicity. This report should be run only by users who have permission to view and analyze this type of data.</td>
</tr>
<tr>
<td><strong>Application Details</strong></td>
<td>Displays all the applications initiated or completed along with their status.</td>
</tr>
<tr>
<td><strong>Background Details</strong></td>
<td>Shows detailed information specific to background verifications including submission and completion dates, status, discrepancies, criminal hits - all for the sub-requests that will be reported on. Also includes adjudication status for those accounts that adjudicate.</td>
</tr>
<tr>
<td><strong>Background Forms Details</strong></td>
<td>Displays all of the background forms that have been initiated in a specific timeframe, including which recruiter they are assigned to, their status, initiation and submission dates.</td>
</tr>
<tr>
<td><strong>Background Request Aging</strong></td>
<td>Shows how long open requests, including their subrequests, have been in process.</td>
</tr>
<tr>
<td><strong>Deleted I-9 Forms</strong></td>
<td>Shows all I-9 forms that have been deleted, within a specific timeframe, the date each form was deleted and which user deleted them. (For accounts with I-9).</td>
</tr>
<tr>
<td><strong>Discrepancies</strong></td>
<td>Shows all reports in a selected timeframe and lists which reports have discrepancies associated to them so they can be reviewed in greater detail from the Backgrounds List. All background verifications in this report are consolidated, meaning that if any extensions were created for a given applicant; those results will be included under a single record for the applicant.</td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Employment Application Details</td>
<td>Shows all of the employment applications that have been initiated in a specific timeframe, including which recruiter they are assigned to, their status, initiation and submission dates. (For accounts with EAS).</td>
</tr>
<tr>
<td>I-9 Document Expiration Dates</td>
<td>Shows all employees who have completed I-9 forms and indicated supporting documents with expiration dates, and therefore will require their work authorization to be re-verified. (For accounts with I-9).</td>
</tr>
<tr>
<td>I-9 Forms Details</td>
<td>Shows all the I-9 forms that have been initiated and/or completed in a specific timeframe, the employee name including which manager they are assigned to, the status of the form, the status of the I-9 verification, initiation and submission dates. (For accounts with I-9).</td>
</tr>
<tr>
<td>Pending I-9</td>
<td>Lists all pending I-9 sub-requests along with verification status. This report lists those that have not been resolved yet. (For accounts with I-9).</td>
</tr>
<tr>
<td>SSN Trace Results</td>
<td>Displays the status and details of Social Security Traces within a specified date range. This report shows the status totals of all traces as well as request details for each applicant. Consolidated.</td>
</tr>
<tr>
<td>Turnaround Time</td>
<td>Shows details on verifications and report processing times within a specified date range. Included among the details are Applicant Name, Social Security Number, Service Requested, Submission and Completion Dates and turnaround statistics.</td>
</tr>
<tr>
<td>Turnaround Time Summary</td>
<td>Shows the summary report completion turnaround along with an average processing time by report type within a specific date range.</td>
</tr>
<tr>
<td>US DOT Drug and Alcohol MIS Report - Details</td>
<td>Detailed information for the DOT report. (For accounts with Drug and Health Screening).</td>
</tr>
<tr>
<td>US DOT Drug and Alcohol MIS Report - Summary</td>
<td>Summary information for the DOT report. (For accounts with Drug and Health Screening).</td>
</tr>
<tr>
<td>US DOT Drug Testing MIS Report - Details</td>
<td>Detailed information for the DOT Drug Testing report. (For accounts with Drug and Health Screening).</td>
</tr>
<tr>
<td>User List</td>
<td>Shows a list of all account users.</td>
</tr>
<tr>
<td>User Permissions</td>
<td>Shows a list of users and associated permissions</td>
</tr>
</tbody>
</table>
Report Delivery Settings
You may schedule reports to be run in the future and then send them to HireRight users upon completion. Reports are scheduled to be run inside each individual report so that you can set report parameters that should be used each time the report is run. These delivery settings are managed for each report after they have been scheduled from the Report Delivery Settings link in the upper right corner or the Delivery Settings link in the left navigation menu.

To change Report Delivery Settings
1. On the Management Reports tab
2. Click the Delivery Settings link, the Report Delivery tab opens.
   a. From here you can see which reports have been scheduled, who scheduled them, when they were scheduled to start, how often they should recur, and the current status. You may also edit and delete the delivery settings regardless of who originally scheduled the report as long as you have permission to manage report delivery settings.

Report Settings
Each report is run from a Report Settings screen (which you see after selecting a report from the Management Reports Main Menu). From the Report Settings screen, you can set report filters before running the report. You may also send or schedule a report as well as export reports to HTML and Tab Delimited (Excel) formats.

Filters
There are six types of filters on this screen:
- **Timeframe filter** – Each report includes a timeframe filter. This filter includes the following settings

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last 24h</td>
<td>Shows all data for the past 24 hours.</td>
</tr>
<tr>
<td>Last week</td>
<td>Shows all data for the past 7 days.</td>
</tr>
<tr>
<td>Last month</td>
<td>Shows all data for the past 30 days.</td>
</tr>
<tr>
<td>Last 6 months</td>
<td>Shows data for the past 180 days.</td>
</tr>
<tr>
<td>Last year</td>
<td>Shows data for the last 365 days.</td>
</tr>
<tr>
<td>All (slow)</td>
<td>Shows all data for the account from the time the account was set up.</td>
</tr>
<tr>
<td>Exact</td>
<td>Allows you to set a specific date range by entering the beginning and ending day/month/year.</td>
</tr>
</tbody>
</table>
• **Users filter** – Each report includes a “Select Users” filter. This filter lists the names of users that can be selected; any data related to these users will be included in the selected report.

• **Status filters** – There is one filter that allows you to filter a report according to the status of a background request. It is labeled “Include statuses of orders.”

• **Advanced filters** – These filters allow you to set custom filters where the data in a certain column should be filtered based on the data in the “value” field according to the operator that is selected.

• **Group Information By** – Certain columns in the report are available in each of the three “group by” menus. You can choose up to three levels of grouping.

• **If Grouping and Advanced Filters are not Applicable** – In some cases, reports are designed in such a way that grouping and advanced filtering are not applicable.

**Run Report Link**
Once the filters are defined, you simply click the Run Report link located above the filters in the Report Settings screen. When the report is run, it is displayed in a new browser window. As soon as the report has been run completely, the report is displayed.

From within the report, you can use the Send, Schedule, and Export features.

**Send Link**
This feature allows you to email a link to a report to any other HireRight user associated with the given account. The report that the recipient will view is the report that was run using the report settings the sender used. They will not be able to change these settings.
1. Click the **Send** link
2. Select the users you want to send to and click **Add Selected** or you can **Add All**
3. Add any comments you wish to include.
4. Click **OK**.

**Schedule Link**

This feature allows you to schedule a report to be run at a specific time and then emails the specified users a link to the report (which is similar to the way “Send” functions).

**To schedule a report:**

1. In the **Start Date** field, enter the date (mm/dd/yyyy) the report will run.
2. In the **Time** field, enter the time (hh:mm) and select either AM or PM.
3. In the **Recurrence** section, select how often you want this report to be run.
   a. To run the report just once, enter 1 in **End after ___ recurrences**.
   b. If you select **No end date**, the report will be run indefinitely based on the recurrence you selected.
   c. If you enter a number in **End after ___ recurrences**, the report will no longer be run after the specified number of times.
   d. If you enter a number in the **End by** field, the report will no longer be run after the specified date.
4. Enter the appropriate responses to email the report to the designated recipients
5. **OK.**
Export Link
You can export reports in two different formats by selecting the “Export” link either in the Report Settings screen or directly from the report. All rows in the report are exported including totals. However, the formatting available in the HTML report is only available for the HTML export and is not yet available in the Tab Delimited format (Excel).

1. Click **Export** on the Report Settings screen.
2. Select **Tab Delimited** to view the report in Excel or HTML to view in the browser.

Configuring Management Reports

Setting Up Management Reports
The default setup for management reports is that only super users will have access to management reports; however, super users can use the HireRight system to allow other users in the account to view some or all of the Management Reports available.
To set permissions for viewing Management Reports for single reporting clients:
1. Select Setup, Setup Users from the HireRight MENU.
2. To add Management Report privileges for a user, select Edit in the Action list box.
3. Click Go, then click on Permissions.
4. Scroll down to the Management Reports 2.0 permissions.
5. Click the check box(es) to the left of each report name to set viewing privileges.

To set permissions for viewing Management Reports for parent/child clients:
1. Select Setup, Setup Users from the HireRight MENU.
2. To add Management Report privileges for a user, select Edit in the Action list box.
3. Click Go.
4. Scroll down to the Management Reports 2.0 permissions section.
5. Click Access to Child Account Data