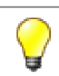
advanced reporting

END-USER GUIDE

Contents

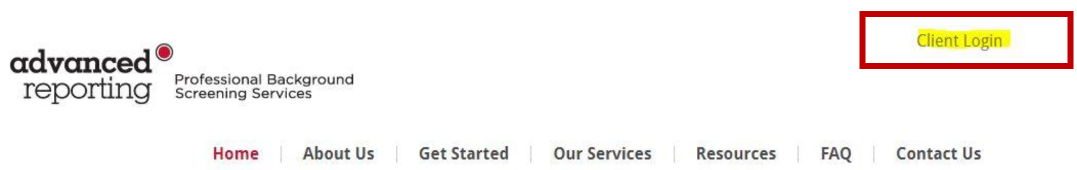
	Good to know - Tricks
	**Please Pay Attention**
	**Please Read, Important**

Logging In

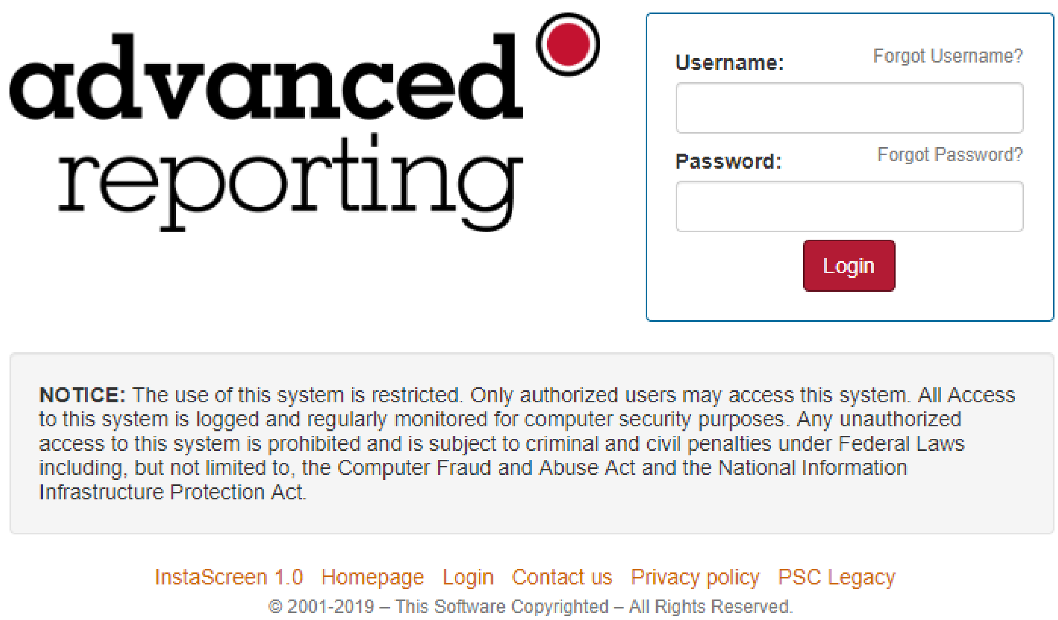
Before Logging into our system, you should be provided with a Username & Password. Only those authorized users with login credentials will have access to the system. Any new users will need to be approved by the organizations Account Administrator.

Under no circumstances should login credentials be shared. The information provided to end users is sensitive and contains personal information of your candidate populations. Sharing login credentials with unauthorized users is a violation of our service agreement.

When logging into the Instascreen system you will be required to provide a username & password. You can find the link to the system on our website www.advrep.com

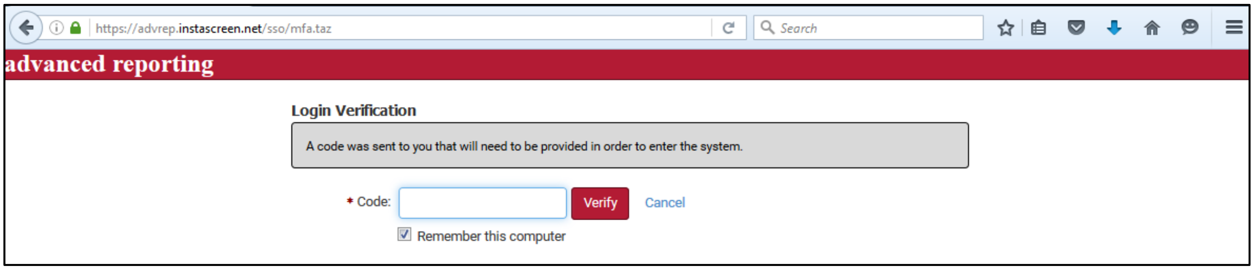


Or by going directly to our system login page: https://advrep.instascreen.net



Multi-Factor Authentication (MFA)

For security purposes, our system has a two-part Multi-Factor Authentication (MFA) system. End users are required to use the google authenticator app, provide a text enabled cell phone number, or email address where they would like to receive the MFA code



The MFA process will be required once annually. Please note that any time you log into the system from a new web browser or different IP address, the system will prompt you for a new MFA code.

TIP: The fastest method to receive your MFA code is to set up your text enabled phone number.

*Please note that non-US cell phone numbers are not supported at this time. Please choose email or the authenticator app if you are located outside of the United States.

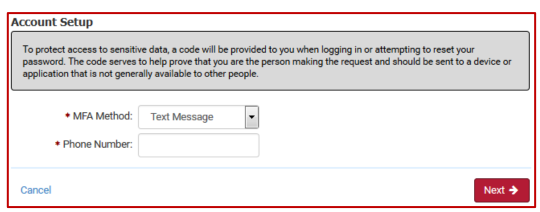
MFA Delivery Options

1. *Text to a Text Enabled Phone Number*

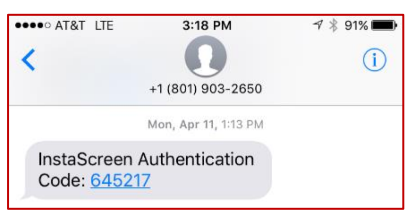
The preferred method to obtain your multi-factor authentication code is to have it sent to a text enabled phone number. When setting up your account this way, the code is instantly sent to your phone number when you are required to provide the MFA code.

Instructions to Set Up Text Enabled Phone Option

- When you log in to the system for the first time, you will select Text Message as your MFA Method and enter your text enabled phone number



- The next time you attempt to log in to the system, you will immediately be sent a text message with your authentication code



2. Google Authenticator App

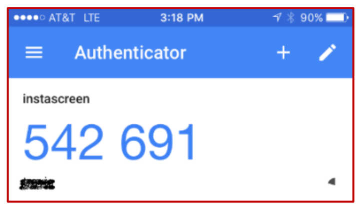
Using the Google Authenticator App is an option for smart phone users. This works similar to many two-factor token authentication methods, where the authentication code changes every 30 seconds.

Instructions to Set Up Google Authenticator App Option

- Download the Google Authenticator App

- When you log in to the system for the first time, you will select Authenticator APP as your MFA Method and you will use your cell phone camera to scan the QR Code that is provided on screen.

- The next time you attempt to log in to the system, you will need to open the Google Authenticator App and enter the code as it appears on your screen.

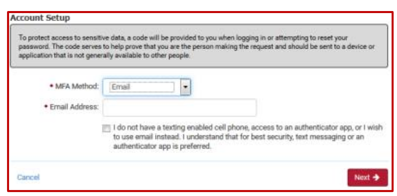


3. Email

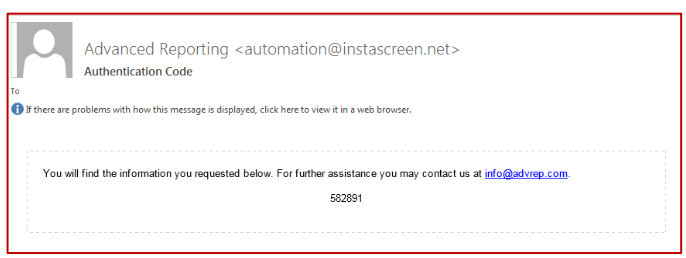
Email is the least preferred method of multifactor authentication, because it can take the longest and has the greatest potential for risk.

Instructions to Set Up Email Option

- When you log in to the system for the first time, you will select E-Mail as your MFA Method and you will use your cell phone camera to scan the QR Code that is provided on screen.

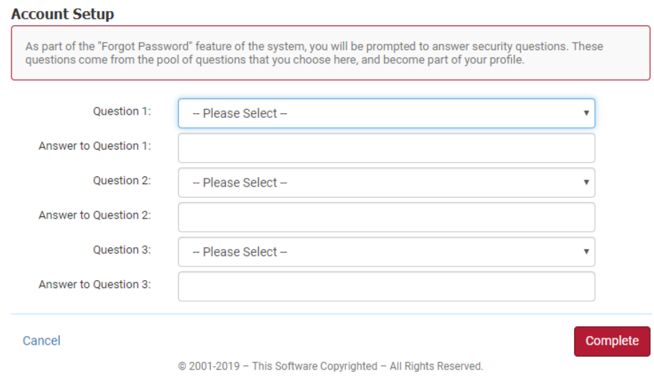


- The next time you attempt to log in to the system, you will receive an email within 15 minutes. Please remain on the webpage requesting the MFA code until you have entered it. If you move away from this page and attempt to log in again, you will need to wait for a new email to be sent with a separate MFA code.



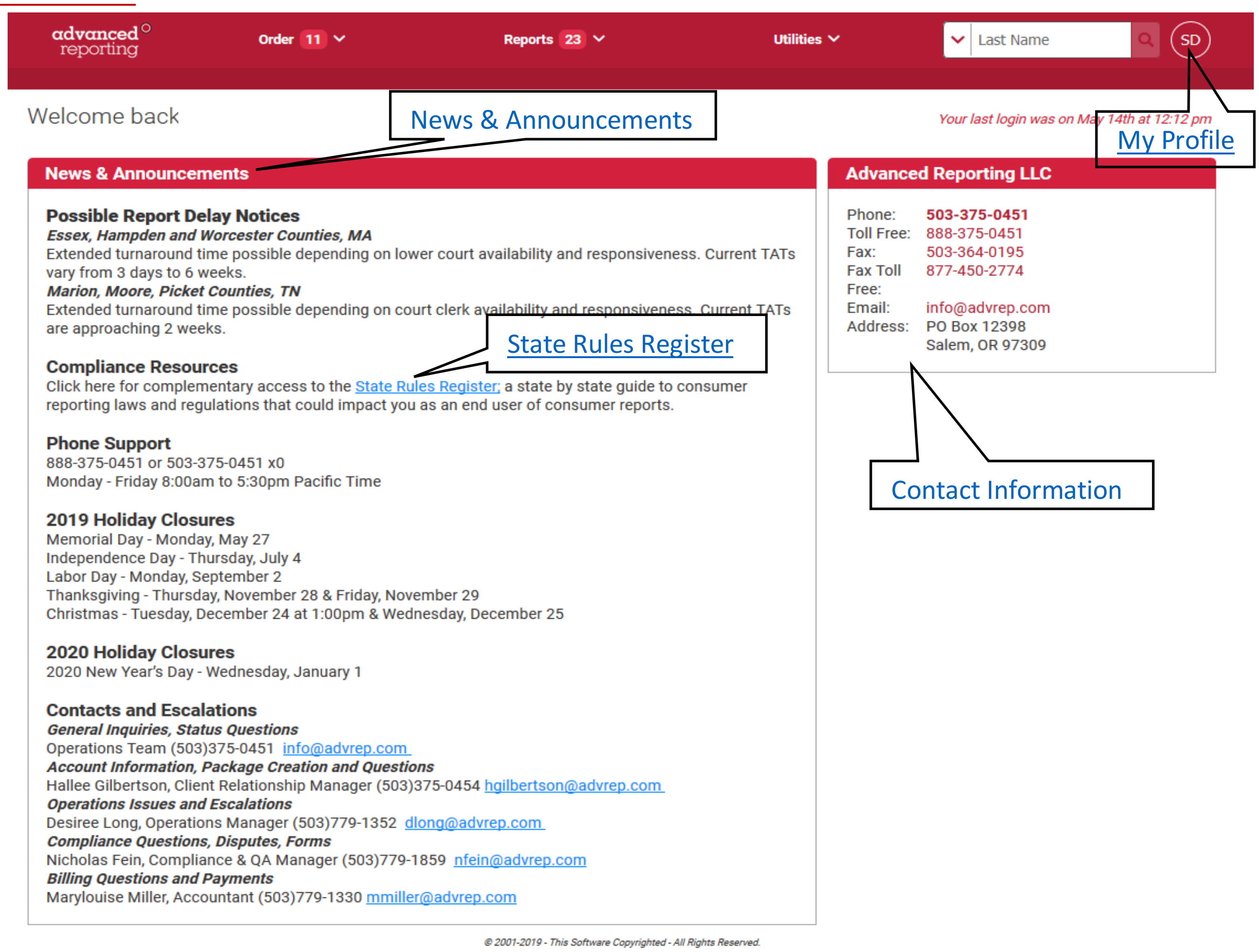
Security Questions

The first time a user logs in they will be requested to fill out security questions. These questions will be used if a password needs to be reset. If the users do not complete the security questions, they can do so at a later time in the My Profile Section.



If the questions are not completed, the only way you will be able to reset your password in the future will be by contacting the account administrator for your organization, or reaching out to our staff at info@advrep.com.

Home Screen

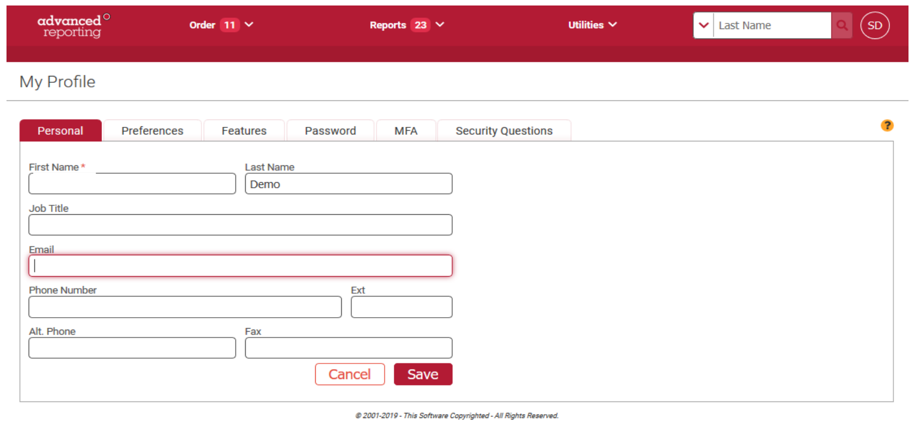


News & Announcements

Our News & Announcements section will show information that we relay to our clients in regard to updates with possible court delays, new legislative rulings that are important to be aware of, or fee changes that could impact your screening program.

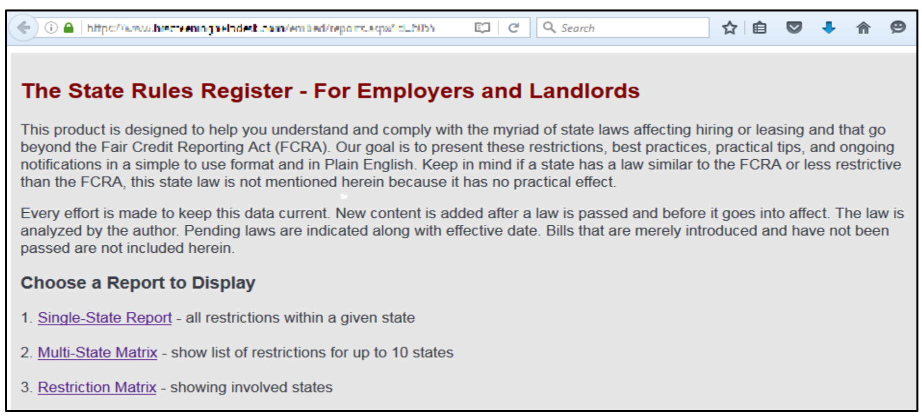
My Profile

The My Profile section allows users to update their personal contact information, modify their preferences as to how the system looks, or change their passwords, and update their security questions.



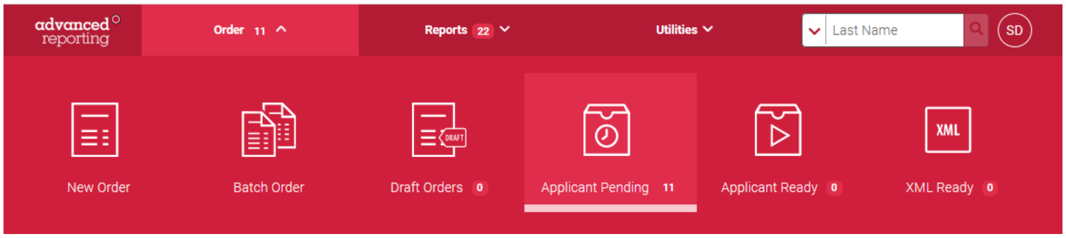
State Rules Register

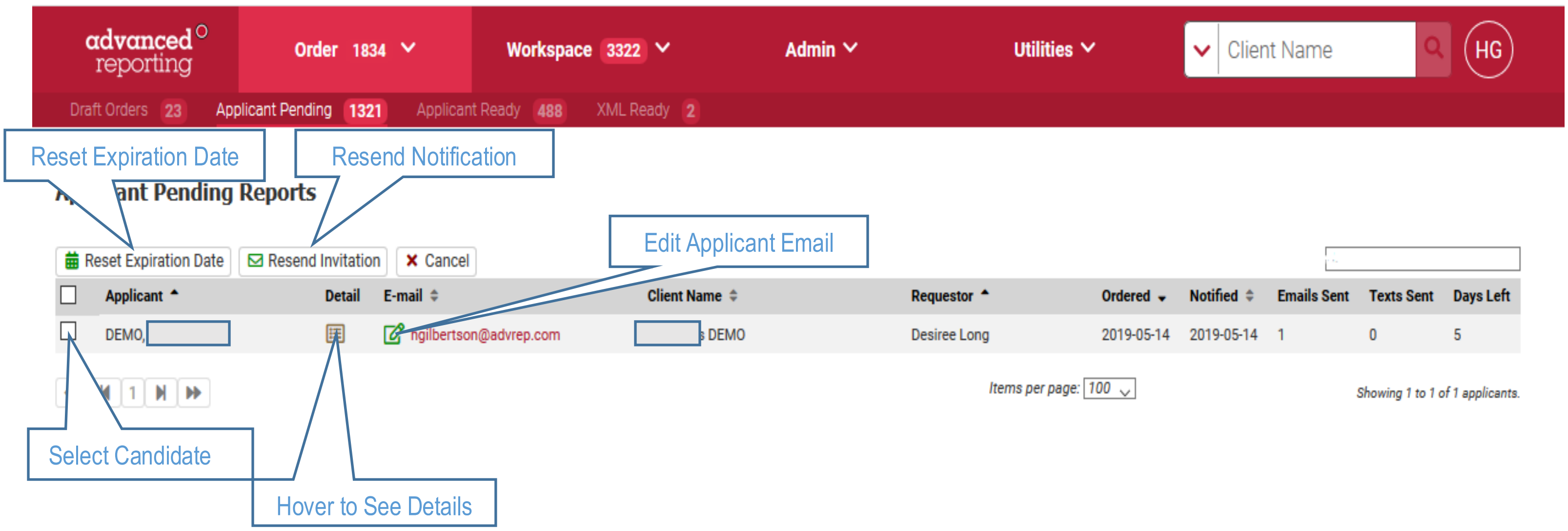
We provide all of our clients free access to the HR Screening helpdesk's State Rules Register for Employers & Landlords. While this shouldn't be used solely as a substitute to legal counsel, it does provide end users with valuable information in regard to state specific laws that they should be adhering to based on where their candidate populations are coming from.



Applicant Pending (For QuickApps)

The Applicant Pending Section of the order screen is where you can view who has been sent a QuickApp email to complete the online background questionnaire but has yet to complete the process. From this screen you can:





Key Pieces:

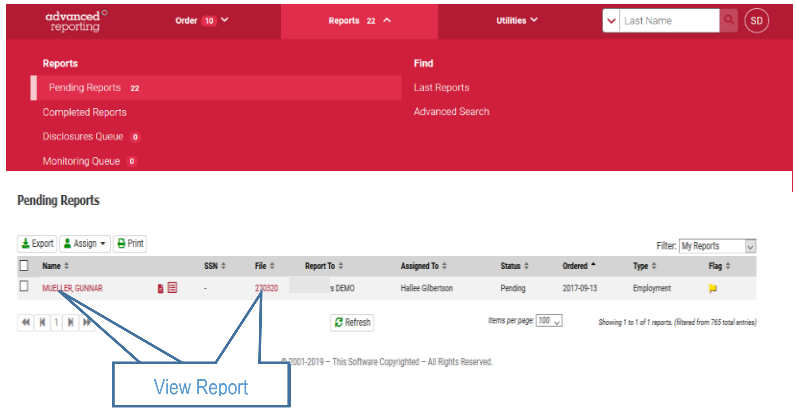
- **Select Candidate** – In order to reset an expiration date, resend a notification, or delete/cancel and application, the selected candidate will need to have the box checked next to their name
- **Reset Expiration Date** – If the candidate fails to fill out the background questionnaire before the link expires, you can reset the expiration date, which will send the candidate a new link via email and give them an additional set number of days to complete the application.
- **Resend Notification** – If your candidate is unable to locate the original email link that was sent to them, you can resend the email notification. By resending the notification, the original expiration date is still in place, which will not allow the candidate to have an additional time to complete the process
- **See Details** – By scrolling over the Detail icon, you will be able to see which product was chosen, what searches will be performed, the total days the application is active, how many remaining days are left before expiration, how many email reminders have been sent, and when the last reminder was sent.
- **Edit Applicant Email** – If the candidate is not receiving the email notification due to mail filters or no longer have access to the given email address, you can use the edit email icon to send the notification to an alternate email ID.

Please Note: After editing an email address, you will still need to reset or resend the email notification within the system, a new email notice will not automatically be sent.

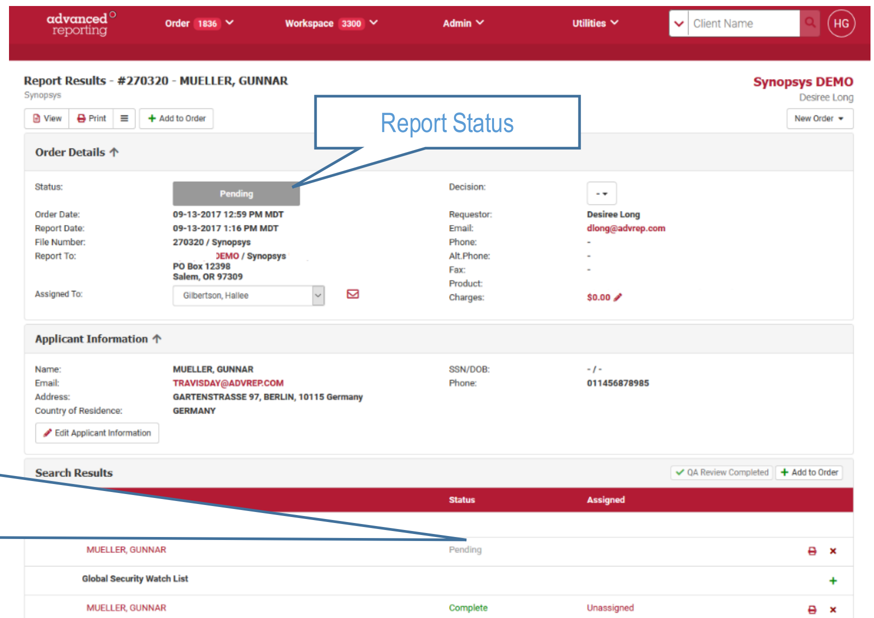
Reports

Pending Reports

From the Pending reports screen you can see backgrounds that are currently in progress. Depending on your permissions you will be able to see your own requests, and possibly requests of other users. You can click on either the applicant's name or file number to open up their report page.



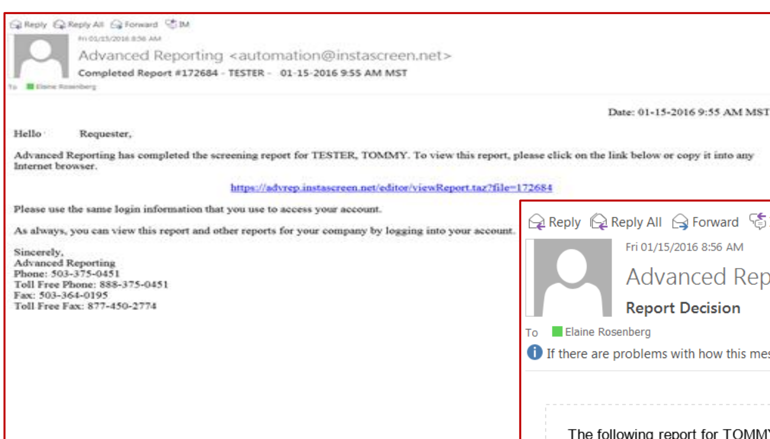
Opening the links from the Pending Reports page will take you to the Report Results page where you can see the status of each individual search.



From the Candidate's report page you will be able to see what searches are pending (in progress) and what searches have been completed.

Completed Reports

When a report is completed the requester of that report will receive an email notifying them of its completion and provide a link to the completed report, as well as an email advising of the report decision once it has been adjudicated internally



Advanced Reporting <automation@instascreen.net>
Completed Report #172684 - TESTER - 01-15-2016 9:55 AM MST

Date: 01-15-2016 9:55 AM MST

Hello Requester,

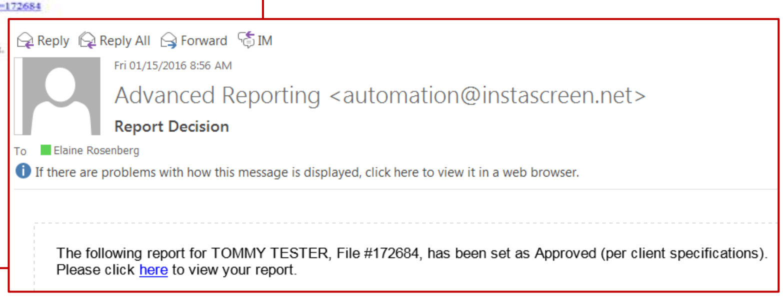
Advanced Reporting has completed the screening report for TESTER, TOMMY. To view this report, please click on the link below or copy it into any Internet browser.

https://advrep.instascreen.net/editor/viewReport.taz?file=172684

Please use the same login information that you use to access your account.

As always, you can view this report and other reports for your company by logging into your account.

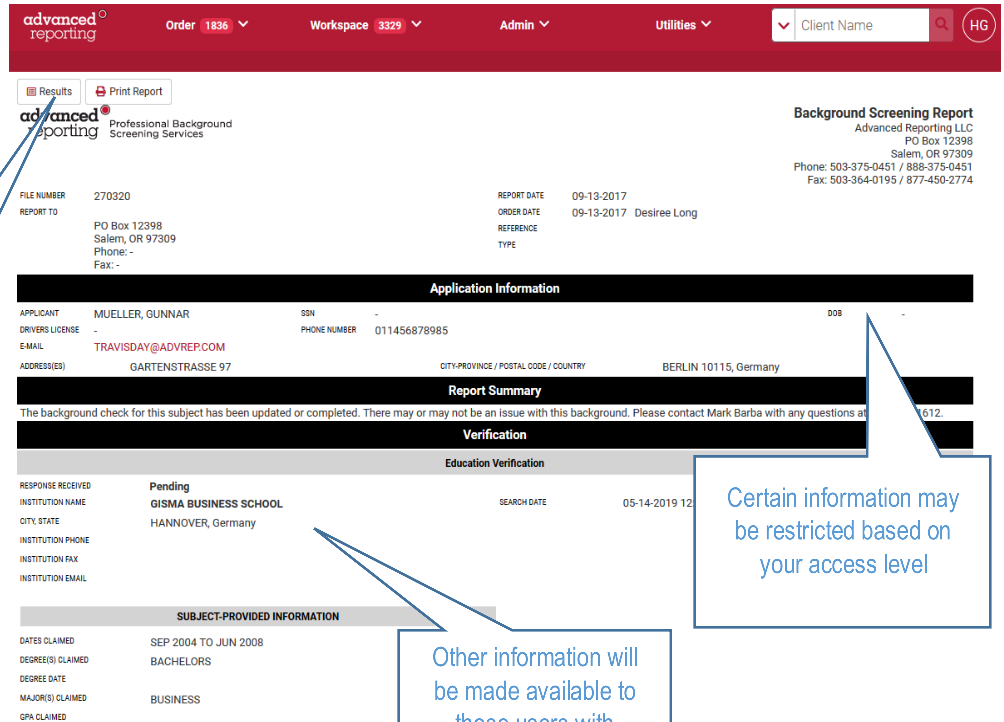
Sincerely,
Advanced Reporting
Phone: 503-375-0451
Toll Free Phone: 888-375-0451
Fax: 503-364-0195
Toll Free Fax: 877-450-2774



Reply Reply All Forward IM
Fri 01/15/2016 8:56 AM
Advanced Reporting <automation@instascreen.net>
Report Decision
To Elaine Rosenberg
If there are problems with how this message is displayed, click here to view it in a web browser.

The following report for TOMMY TESTER, File #172684, has been set as Approved (per client specifications).
Please click here to view your report.

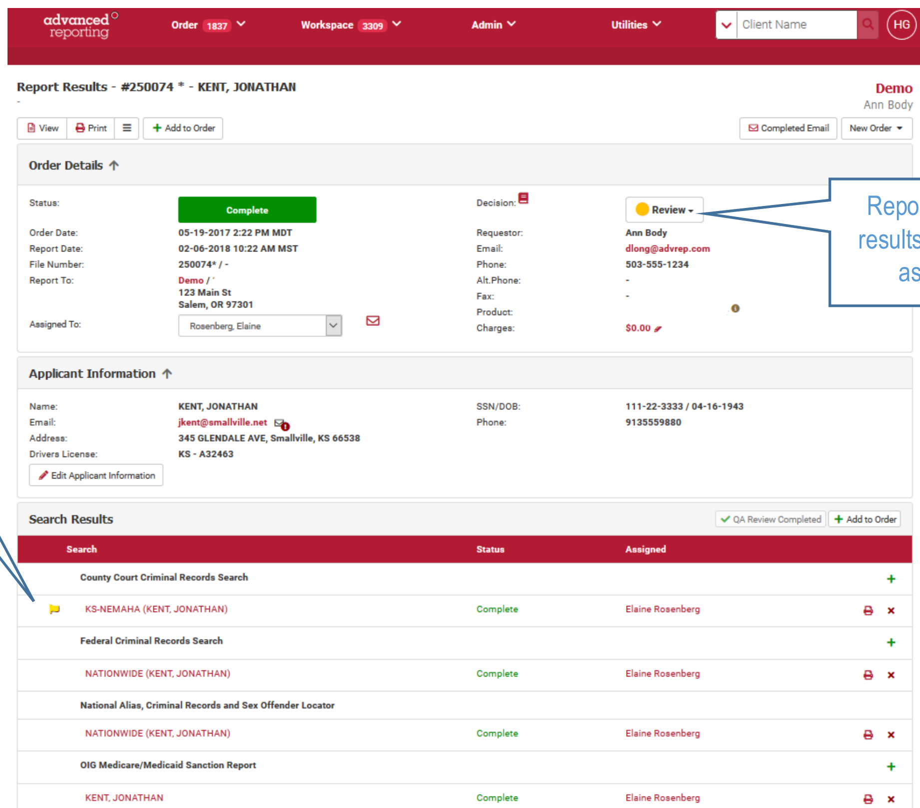
The link in the completed report email will take you directly to the completed report to view it in its entirety. Depending on your user permission you will be able to view portions of the report that have been approved.



In order to view the final report decision or which information may be flagged, you'll need to go to the results page.

Certain information may be restricted based on your access level

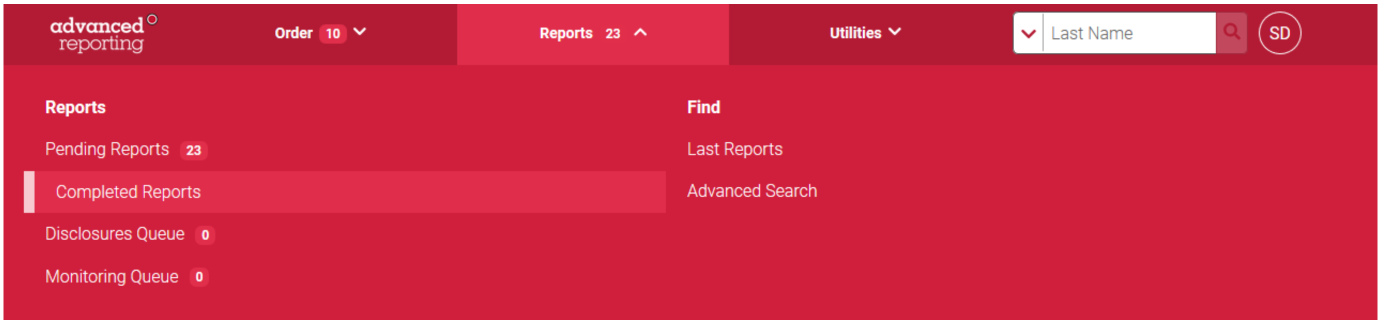
Other information will be made available to those users with appropriate permissions



Report Adjudication results will show here as applicable

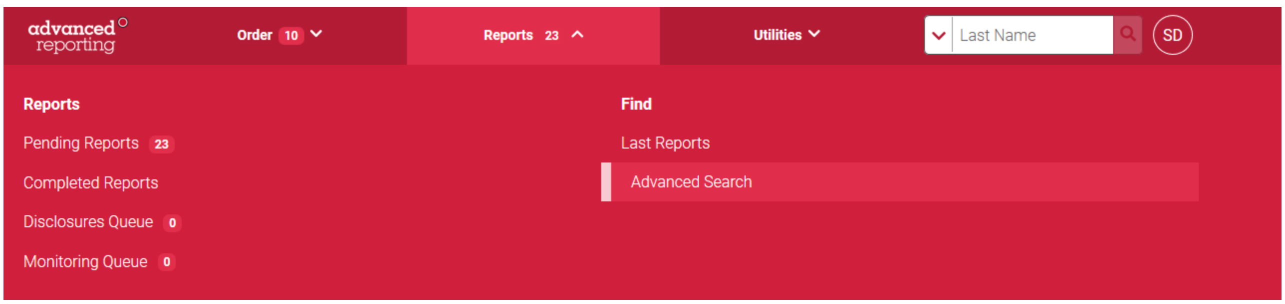
Flagged Searches may contain information that should be reviewed due to potentially adverse information.

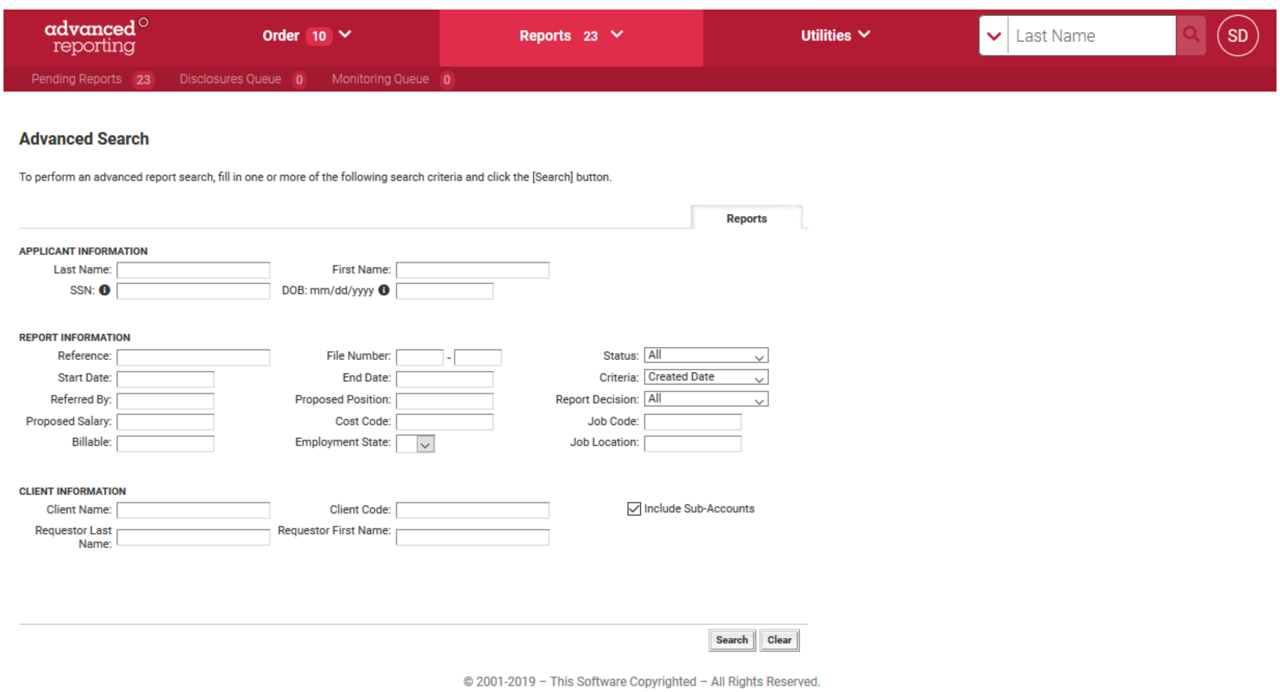
You can also check completed reports from the completed reports screen. Clicking on the applicant's name or file number link will take you to the report results page.



Advanced Search

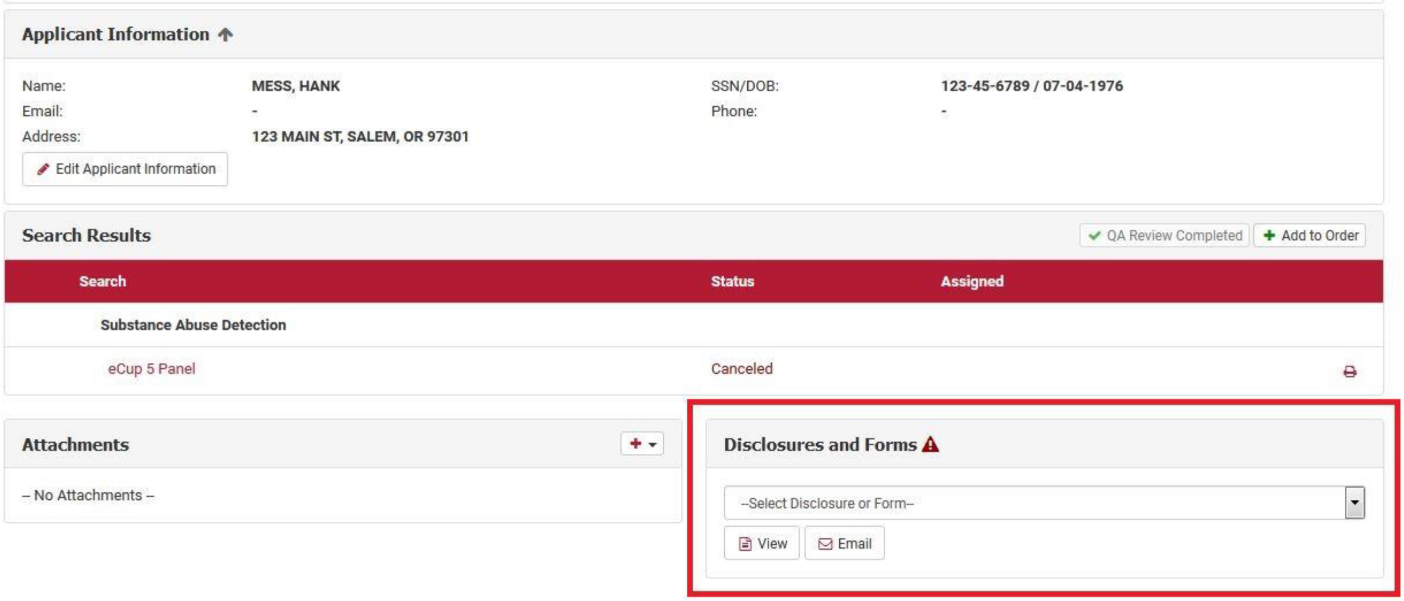
If you're unable to locate your candidate's background by using the search bar at the top of the screen or within either the pending or completed reports sections, you can use the advanced search page to search by a variety of search criteria. This can also be a useful tool in pulling up information on candidate populations falling under a specific category (job code, reference number, cost code, etc).



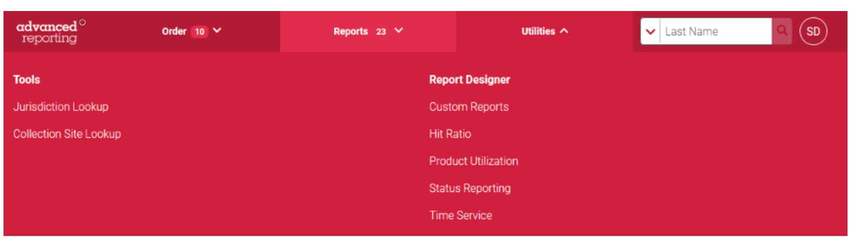


Disclosures and Forms

You can view and send a selection of forms and disclosures using this function. Based on company settings, Pre-Adverse and **Adverse** Action letters can be queued and or sent from the report directly. Depending on the need, these can either be printed and mailed, or a link can be sent to the email address provided by the applicant.



Utilities



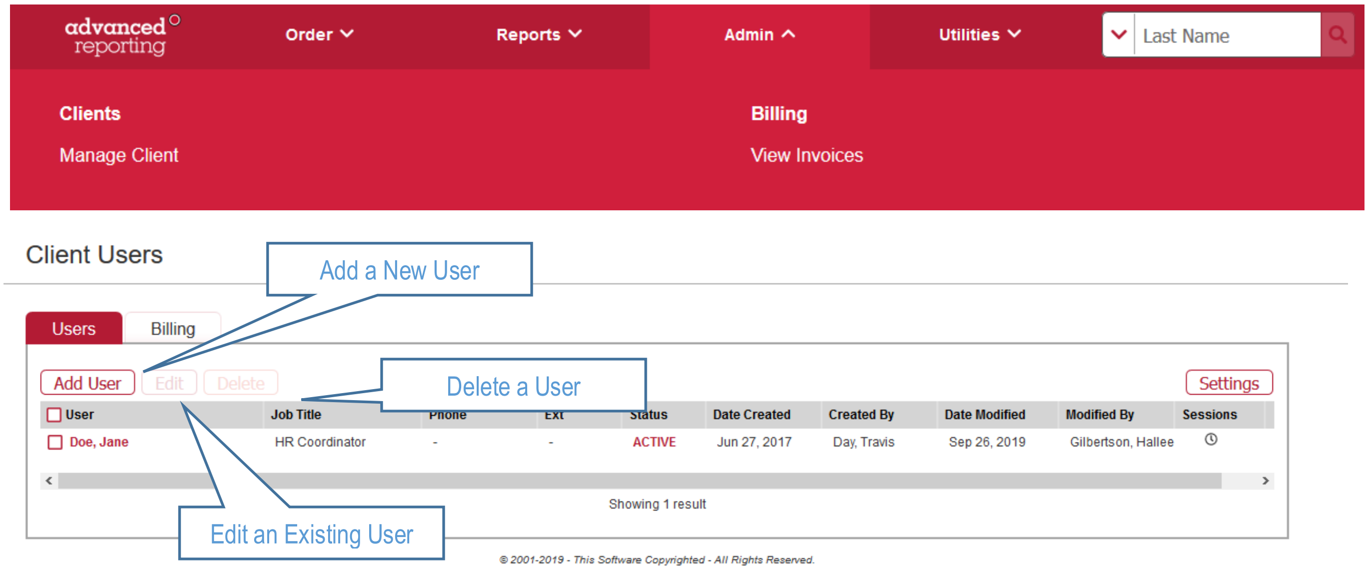
- Custom Reports lets you design your own report
- The Hit Ratio report will allow you to see what percentage of your candidates records have hits/matches
- Product Utilization allows you to see what is being ordered on your candidates.
- Status Reporting gives a snapshot of all of the statuses related to your pending backgrounds
- Time Service lets you review turnaround times for reports or searches

The Utilities screen is primarily used for reporting purposes. It allows your users to take a deeper look into how your program is running. If you would like to go over the reports available, please feel free to reach out to our team for a walkthrough.

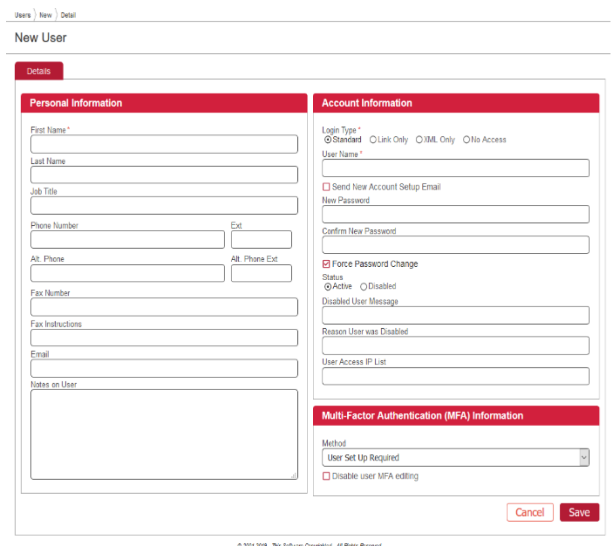
Admin

Add/Manage Users

In order to add or manage users, an end-user must have the appropriate permissions to do so. The User Set up process is simple and straightforward and allows for customization amongst your organizations various users. You can allow users to order reports for themselves or other users, view reports that other users ordered, and restrict viewing access to certain searches depending on each individual users need to know.



User Information

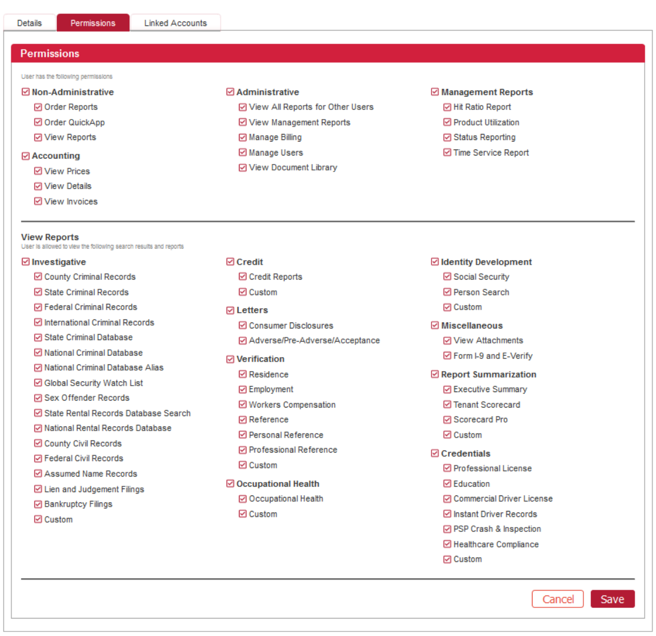


When adding a new user to an account, you have the ability to either provide a password to your user, or trigger the system to send them a link so that they can set up the password themselves.

> For security purposes, we highly recommend that if you create the password for the new user, that you force them to change their password

From this screen you are also able to re-activate a disabled user and reset user passwords.

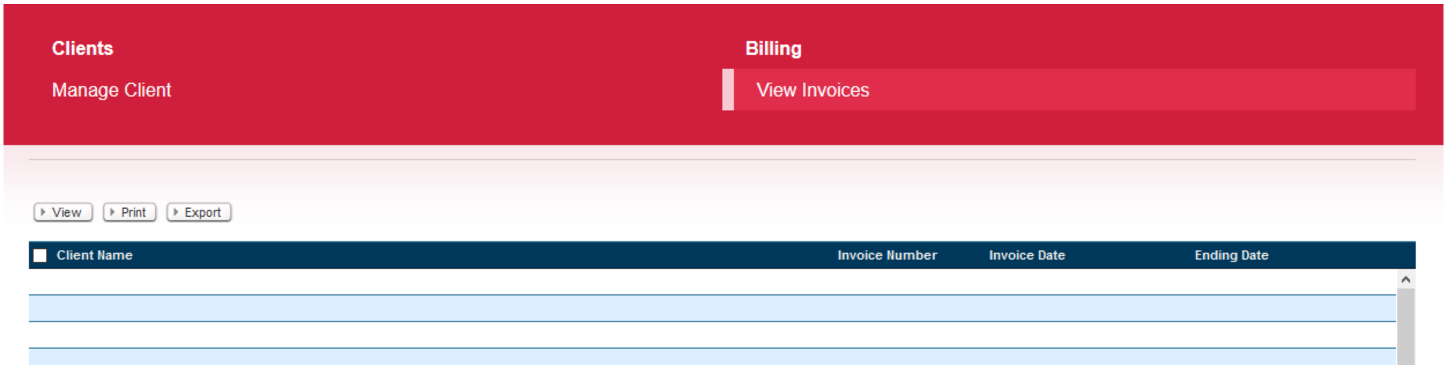
Permissions



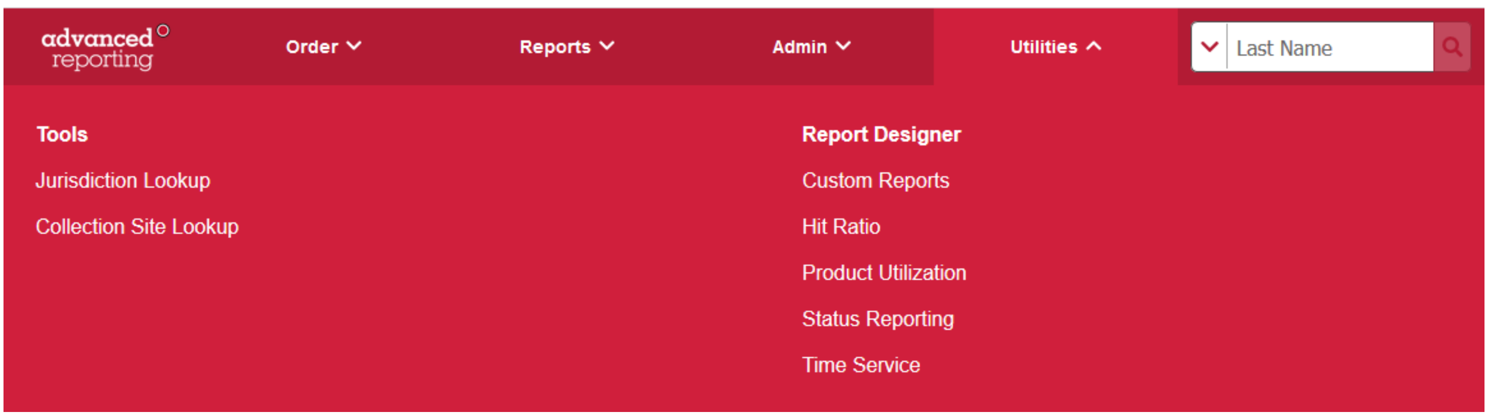
- Allowing users to view reports of other user's means that they will have access to view all of the reports that have been ordered through your account.
- Allowing users to view pricing and invoices is optional
- Access can be restricted by user IP address as well. If an IP address restriction is used, the Multi-Factor Authentication is no longer a requirement.
- By default users are given access to all of the information that is available in the report.
- If you would like some users to be able to view employment & education verifications, but not criminal records, this is where that can be done.
- Management Reports gives you as a user access to some of the reporting tools that are available within our system.

View Invoices

The View Invoices section of our system allows for you to look up old invoices, or export invoice details to a CSV spreadsheet for additional review.



Utilities



The Utilities screen is primarily used for reporting purposes. It allows your users to take a deeper look into how your program is running. If you would like to go over the reports available, please feel free to reach out to our team for a walkthrough.

- Product Utilization allows you to see what is being ordered on your candidates.
- Status Reporting gives a snapshot of all of the statuses related to your pending backgrounds
- The Hit Ratio report will allow you to see what percentage of your candidates records have hits/matches
- Decision Reports allow for you to see what final report decisions are if you have provided us with adjudication criteria that is being applied to your requests
- The cost center report pulls multiple data points together to allow you to take a look at the information

FAQ's

I can't find my applicants report but I know I submitted it.

- Many times when a report has been submitted and a user can't find it within the pending reports section, it's due to a candidate not having completed the online background questionnaire. To see these reports, please check the Applicant Pending link in the Order Section.

My applicant has told me that he never received the email to complete the background questionnaire.

- In certain instances, a candidate's email filtering can cause notifications to be sent to their spam or junk mail folders. We recommend that the candidate's check these folders to see if this is the case. If they are still unable to locate a copy of the notification, you can Resend the email notification, or Edit the candidate's email address to send it to an alternate email address.