



## Employment Screening Associates-Online Tutorial

### TO VIEW LIST OF CANDIDATES SUBMITTED FOR SCREENING

Once you log-in you will be directed to the Main Home Page of the System. Under the **Background Check List** heading it asks you to select your search filter criteria. Select the **Location** and **Status** you wish to search by. Hit the **Search button** to run the search. Your applicant list will appear.

### TO ORDER A NEW BACKGROUND CHECK:

- 1.) Click the second button **'New Background Check'**
- 2.) Verify the location for which you are running this search. **Note if you only have one location profile created, this field will automatically list your default location.** Hit the **'Next'** button at the bottom.
- 3.) The next screen will list the pre-selected services you normally run (Program Profile). If you have no changes, simply click **'Save & Next'** at the bottom of the page. *(Important: The service(s) spelled out in the service agreement you originally signed with ESA are pre-selected on this page. If you check additional boxes, we will complete those services, but your company will also incur the corresponding rate(s).)*
- 4.) The next screen will be the Personal Information screen. Enter all the Applicant's information. **Please complete as many of the fields provided. The more information provided the better. At a minimum we need the First Name, Last Name, Social Security Number, Date of Birth, City and Zip Code.**
- 5.) Once you have completed the required fields of information, click **'Save & Next'** button and fill in the information pertinent to the type of search you ordered, then click **'Save & Next'** until you get to the 'Order Now' screen. Double-check the information you entered and then click **'Order Now'** to officially send the search to our Operations Team.
- 6.) You will then return to the Applicant List. Once back to the main Applicant List screen, you will see the name(s) you've just entered. **Once the report is completed, we will send you an e-mail notification to login and view the results!**

### TO VIEW A COMPLETED REPORT ONLINE:

On the Applicant List page you will find a list of all of the applicant searches you have entered.

- 1.) To view the completed report for an applicant you will click on the blue **'View Results'** link in the far right column next to that applicant's name.
- 2.) On the next page under Results, Click the **'Generate PDF'** button on the top left side of the report screen and this will open up Adobe Reader.
- 3.) From here, you can either click **'Open'** (which will open your report as a PDF file, then click the **'Print'** button in Adobe Reader) or you can click **'Save'** (which will prompt you to save the report to your computer as a PDF file).

**\*Please note: Adverse/Pre-Adverse Action Letters are pre-written & will inform the Applicant of their rights based on the Fair Credit Reporting Act to appeal if they are denied employment from a background check.**

### TO ARCHIVE/UNARCHIVE REPORTS ON YOUR ACCOUNT:

- 1.) Once you have viewed the results you have the option to 'Archive' the report. This will save the report to your account, but will remove it from the Applicant List so that you can access it at a later time.
- 2.) To **ARCHIVE** a report, you will simply click the **'Archive'** link located next to the **'View Results'** link to the right in the column where the specific applicant appears on the Applicant List.
- 3.) To **UNARCHIVE** a report, you will go up to the **'Status'** drop-down menu at the top left of the page and select **'Archived'**. Then you would click on the gray **'Search'** button located just beneath the **'Status'** drop-down menu.
- 4.) This will pull out any archived reports from the account's history and place them on the Applicant List to view.

**\*Please note: All reports will be automatically saved to your ESA account for 2 years from their entry date. Following FCRA guidelines all reports will be purged after the 2-year timeframe.**



## **TO ADD/EDIT USERS ON YOUR ACCOUNT:**

To edit/change any information for your own User account, you will click the 3<sup>rd</sup> button on the top of your account called **'User Admin'**. This will show you all of your information, and you can change your e-mail address or reset your password here. If any information is edited hit the **Save** button at the bottom to save changes.

- 1.) To ADD a NEW User you would click on the 4<sup>th</sup> button on the top of your account called **'Company Admin'**; this is the area for the maintenance of your account. The following tabs will be available: **'Info', 'Services', 'Users', 'Locations', and 'Billing'**.
- 2.) To ADD a NEW User you would go to the **'Users'** tab and select the blue **'Create New'** link. From here you will be prompted to fill in the User information including User Login and Password and e-mail address. You can also limit their access to the 'Company Admin' area by leaving the check box blank next to "User Has Company Admin Access".
- 3.) Once the New User information is entered hit the **Save** button.
- 4.) Once you have created Users for your account they will show up when you click the **'Users'** tab in **the 'Company Admin'**. You can click each User individually in order to assign them to EDIT their info.

**\*Please note: Users can be allowed or restricted access to the 'Company Admin' area when they are created.**

## **TO ADD/EDIT LOCATIONS TO YOUR ACCOUNT:**

You can create locations within your account for different markets or offices that you may have. Or if you prefer to sort by department, this is where you can designate the locations that will print out as sub-totals on your invoice and will organize your applicants accordingly.

- 1.) To ADD a NEW Location to your account, you would click on the 4<sup>th</sup> button on the top of your account called **'Company Admin'**; this is the area for the maintenance of your account. There are tabs available for **'Info', 'Services', 'Users', 'Locations', and 'Billing'**.
- 2.) To ADD a NEW Location you would go to the **'Locations'** tab and select blue **'Create New'** link. From here you will be prompted to fill in the Location information including the Location Name and Description. You will want to choose your Main Location as the 'Parent Location'. Hit **Save**.
- 3.) When you go back to the 'Company Admin' area of your account and click on the **'Locations'** tab, you will see all of your Locations you setup listed individually. If you click on each Location, it will bring up a new set of tabs for that specific Location. This is where you can view the default program that is setup for each different Location. If you need to make any changes or add services to a Location's default programs please contact ESA with the provided contact information below.
- 4.) Also, this is the same area you would go to assign Users to specific Locations and to Add/Edit Users to be sent e-mail notifications for completed background check results.

**\*Please note: You can have unlimited Locations and Users on your ESA Account and you can designate multiple Users to each Location and have a separate default program for each Location as well.**

### **Other quick notes:**

- + You can change your password at any time by going into the User Admin section of your account.
- + You can create multiple default programs that are specific to each different Location (contact US about this).
- + When you click the **'Save & Order Later'** button after you enter the search it will save what you have entered up to that point and you can go back and edit the information at a later time and then order the search from there.

Please don't hesitate to call when you have someone to enter the first time. Any operational questions can be addressed simply by contacting our main line at 513-521-1400. Someone on the Operations Team will be available to walk you through anytime you need it.

Thank you for your business, and we look forward working with you!