New Customer Tutorial
Information Confidentiality

It shall be agreed by the recipient of the document (hereafter referred to as “the other party”) that confidential information disclosed by TalentWise through its documents shall be retained in confidence by the other party, and its respective employees, affiliates and/or subsidiaries, pursuant to the following terms and conditions:

Confidential Information

For the purpose herein, the term “Confidential Information” shall mean the following:

Any information, know-how, data, process, technique, design, drawing, program, formula or test data, work in process, business plan, sales, suppliers, customer, employee, investor or business information contained in a document, whether in written, graphic, or electronic form; or

Any document, diagram, or drawing which is either conspicuously marked as “Confidential”, known or reasonably known by the other party to be confidential, or is of a proprietary nature, and is learned or disclosed in the course of discussions, demonstrations, or other collaboration undertaken between the parties.
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Introduction to the TalentWise dashboard interface

Learn how to navigate around the TalentWise dashboard interface
At a glance: Navigation Tabs and Settings Bar

**Navigation Tabs:**
- **Dashboard** – Launch packages for new candidates.
- **Screen** – Screening Reports and Tickets.
- **Records** – Candidates list and Documents repository.
- **Reporting** – Track turn around times and hit rates.

**Settings Bar:**
- **Admin** – Manage subaccounts.
- **Resources** – Release forms, training materials, FAQs and more.
- **Account Settings** – Company profile, payment Information and preferences.
At a glance: Sidebar

Search Box:
- Search by Candidate ID.
- Search by Candidate Name.

Quick Launch
Initiate Screening Packages

Recently Viewed:
- Screening Reports
  - In Process
  - In Review
  - Clear
  - Alert
- Onboarding Reports
  - In Process
  - Clear
  - Alert
- Candidates

Collapse the sidebar
Feature Focus: Navigation Tabs
Navigation Tabs: **Dashboard**

From the **Dashboard** tab you may initiate a screening package for new candidates.

launch or **Ticket** new Screening Packages.
Navigation Tabs: **Screen**

The **Screen** Tab has two sub-tabs, which allow access to Screening reports and Tickets.

**Screen Sub-Tabs:**
- **Screening:** search for screening reports to track their progress.
- **Tickets:** find the ticket status for screening reports.
Navigation Tabs: Records

The Records tab has two sub-tabs, which allow access to candidates and documents.

Records Sub-Tabs:

- **Candidates**: search for specific candidates to track candidate progress. Clicking on a candidate name will lead to the candidate view.
- **Documents**: search for candidate related documents like Electronic Disclosure Release Forms.
Feature Focus: Candidate View

All candidate related information in one central place
Candidate View: All Information in One View

- **Candidate profile**: view and edit the candidate profile.
- **Ticket History**: track the progress of a ticket.
- **Screening History**: track the progress of a Screening package.
- **Documents**: view available candidate related documents.
- **Notes**: add notes to a candidate.
- **Notes**: view candidate system generated log.
Candidate View: Get to a Candidate View

You can get to a candidate view in any of the following ways:

**Search Box:** search for a candidate using a name or candidate ID.

**Candidate Name:** click on a candidate name from anywhere within the application interface.
Candidate View: Candidate ID

Each candidate has a unique Candidate ID. You can find the candidate ID in the candidate profile section of the candidate view.

A candidate can have multiple reports, represented by a Report ID.

**Candidate ID:** one per candidate.

**Report IDs:** multiple reports per candidate.
Feature Focus: Settings Bar
Under the **Admin** tab you can manage your subaccounts.

**Admin Sub-Tabs:**

- **Current Subaccount:** manage current subaccounts.
- **Add Subaccount:** add a subaccount to the currently active subaccounts.
- **Settings:** manage active subaccounts report viewing rights.
The Resources section contains special release forms, training guides and additional legal and compliance documents.

**Resources Sub-Tabs:**

- **Release and FCRA documents**: legal documents for review (some are required to run searches).
- **Frequently Asked Questions**: most common asked questions by our customers and answers.
- **Terms and Conditions**: our TalentWise Terms and Conditions.
- **Privacy Policy**: Our TalentWise Privacy Policy.
Settings Bar: Account Settings

Manage your account settings like company profile, payment details and email notifications.

Account Settings Sub-Tabs:

- **Preferences**: manage preferences like email notifications and invoice emails.
- **Company Profile**: manage company information like name and industry.
- **Payment Information**: manage payment information like credit card number and billing address.
- **Change Password**: change your account password.
Initiate a Screening Package

Learn how to launch a screening search package
Launch a Package: **For a New Candidate**

For a **new candidate**, start from the Dashboard tab or use the quick-launch feature.

**Quick Launch**
You can use the quick launch from anywhere within the application interface.

**Dashboard Launch**
Depending on the package you wish to initiate, click on the respective launch button.
Launch a Package: For an Existing Candidate

For an existing candidate, start an additional search from the candidate view. This will ensure that the new search is attributed to the same candidate.

Add Screening
Click the “Add Screening” button to start an additional search package for a candidate.
Launch a Package: Package Form

The Package Form is where all required candidate information will be entered in order to perform the screening search.

Authorization

Choose to obtain the candidate consent electronically or manually if you already have it under your possession. If the candidate already has an electronically signed consent form, you can use the existing one.

Candidate Profile

Fill in all the required information in order to continue submitting the search. If you started from the candidate view, all existing information will be pre-populated in the form.
Launch a Package: **Order Review**

Review your order and click the “Purchase” button to confirm, or click the “edit” link to go back to the package form.

### Review Your Order

<table>
<thead>
<tr>
<th>Package</th>
<th>Credit Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please review the package details below. To submit your purchase, click the Purchase button. To change any information, use the edit links.</td>
<td></td>
</tr>
</tbody>
</table>

**Candidate Profile**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Jay Alan Lawrence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security Number:</td>
<td>xxx-xx-1899</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>(555) 555-5555</td>
</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:test.candidate.email@gmail.com">test.candidate.email@gmail.com</a></td>
</tr>
<tr>
<td>Address:</td>
<td>76 ridge dr</td>
</tr>
<tr>
<td></td>
<td>Dayton, OH 45459</td>
</tr>
<tr>
<td>Reference Code:</td>
<td>Group1</td>
</tr>
<tr>
<td>Memo:</td>
<td>Not Provided</td>
</tr>
</tbody>
</table>

**Credit Report**

<table>
<thead>
<tr>
<th>Included</th>
</tr>
</thead>
</table>

**Edit** to go back to the package form and edit the candidate details.

**Purchase** to confirm and continue.
Launch a Package: **Confirmation Page**

The Thank You page confirms that your order was submitted. In some cases you will need to upload a specific release form for the search to start.

**Charlie Fame - Candidate View**

### Confirmation

- **Candidate**: Charlie Fame (18642)
- **Package**: Consent-Based SSN Verification
- **Date Submitted**: March 27, 2012

All email regarding this order will be sent to zpom@intellus.com. To add or change addresses, or to turn off notifications, visit your Preferences page. If you have any questions regarding this order, please call Customer Support at 1.866.338.6739 and reference Report ID 596324104.

### IMPORTANT: Additional Action Required

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

- **Consent Based SSN Verification** — We must receive a release form signed by your candidate. [Sample Form](#)

Please have your candidate sign all required forms and return them to you. Forms may be uploaded electronically or faxed to TalentWise (Attention: Authorizations) at 1.877.974.6150. When faxing, be sure to reference Report ID 596324104 on your cover sheet. Keep originals for your records.

If you don’t have an electronic version of the form available to you now, you may upload from your Screen tab by selecting Attach Files from the dropdown menu.

**Click the “Go to Candidate View” or “View Report in Progress” buttons to track the progress of the screening process.**

**In cases when additional release forms are needed, you will be able to add those via the “Upload File for…” button.**
Initiate a Screening Package

Learn how to “ticket” a screening search package
Ticket a Package: Package Form

When choosing to “ticket” a search package, you only need to enter the candidate full name and email address, the remaining information will be completed by the candidate.

Authorization
Check the box to state your compliance with all applicable laws as defined by the FCRA.

Generate a Candidate Ticket
Fill in all the required information in order to continue submitting the search. If you started from the candidate view, all existing information will be pre-populated in the form. Click the “Generate Ticket” button to continue.
Ticket a Package: **Email to Candidate**

The candidate will receive an email explaining about your intent to run a background check, with further instructions how to proceed.

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**Subject:** REQUEST FOR PRE-EMPLOYMENT BACKGROUND CHECK -- COMPANY NAME

Dear JAY LAWRENCE:

As part of your application with Company Name, we will be conducting a pre-employment background check on you.

So that we can expedite your application, please do the following:


2) Click on the link below to authorize and begin this background check. All information must be filled in to proceed with your pre-employment screening.


If you have any questions regarding this screening, please contact Company Name or TalentWise at 1.866.246.3570.

NOTE: This message was automatically generated. Please do not reply to this message.
Ticket a Package: Candidate Certification & Authorization

Prior to submitting the candidate information the candidate will be required to review and complete a certification and authorization form.

The candidate will read and check all boxes, understanding their rights and agreeing to the background check. Once all boxes are checked they will need to click the “I Accept” button to continue.
Ticket a Package: **Package Form (Candidate Facing)**

The candidate will fill in the required information for the screening search package to start.

**Authorization**
The candidate will state their agreement to the TalentWise terms and conditions.

**Candidate Profile**
The candidate will fill in the details required for the screening search package to run.
Ticket a Package: Email to Customer

Once the candidate submitted the form with all their personal details for the background check, you will receive an email from TalentWise, informing you of the search initiation.

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**Dear Jim Smith,**

The following ticket has been filled by the applicant and is ready for processing.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Ticket Package</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jay Lawrence</td>
<td>Credit Report</td>
</tr>
</tbody>
</table>

To view this ticket, please visit your Tickets page.

TalentWise

If you do not wish to receive notification messages like this, please contact your Account Manager. Do not reply to this message, as your reply will not be read. © 2003-2012 TalentWise
Screening Report

Learn how to access and read a screening report
Screening Report: Find a Report

To search for a report go to the Screen tab or to the candidate view and click the report icon to view the report.

Search for a Report

Search by Report ID or candidate name and SSN. If you wish to search by additional parameters like Status, Result or the search Package, expand the “Advanced Search Options” and use the different filters before running the search.

Report Icon

Clicking the report icon will take you to the report view.
Screening Report: How to Read a Report – Report Header

Report Information
All report information, like candidate details, report ID, status, etc.

Report Actions
Report related actions like open as PDF, Print or Email the report.

Report Status
A high level status of all report components. Clicking the component name will lead to the component details.
Screening Report: How to Read a Report – Report Content

Component Information
Each report component, depending on the screening search that was performed, will contain the component relevant information.
In addition, the component result will be shown in **green** or **red**, representing clear or alert.
Welcome Aboard!

For more information contact your account manager or our customer support team at customersupport@talentwise.com

1.866.338.6739