



DISAScreen User Guide

Table of Contents

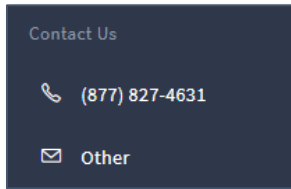
DISAScreen Contact & Resources	3
DISAScreen Access	3
Understanding My Dashboard	3
Navigation Pane	3
Header	5
Workspace	5
Submitting Orders within DISAScreen	7
Submitting a Candidate Order	8
Candidate Orders FAQs	9
Submitting a Mini Order	11
Submitting a Standard Order	13
Submitting an A La Carte Order	16
Managing Orders	17
Locating Orders	17
How to track order statuses and Activities	17
Adding Searches to an Existing Order	18
Adding Documents	20
Locating Documents	21
Notifications	22
Request Status Update	23
Responding via secure email	25
Adding Notes in DISAScreen	27
Viewing Completed Reports	28
Viewing Multiple Orders	29
Archiving orders	29
Grading	31
Adverse Action	34

DISAScreen Contact & Resources

Your dedicated Client Care team can be reached via email and phone.

Email: screening.support@disa.com

Phone: 877-827-4631



DISAScreen Access

In order to be compliant with the Fair Credit Reporting Act (FCRA) requirements for DISA Solutions as the third-party administrator, the Client and you, the end user.

You will be required to abide by the following:

- Only one person should be using your account: You.
- Any new users or changes to user access must be submitted to us in writing by Corporate (Admin Users)
- Only one candidate per Order number

Understanding My Dashboard

Your Dashboard is what you see when you first log in. It has the Navigation pane on the left, actionable icons across the top header, and workable sections in the workspace area, for dealing with candidate orders.

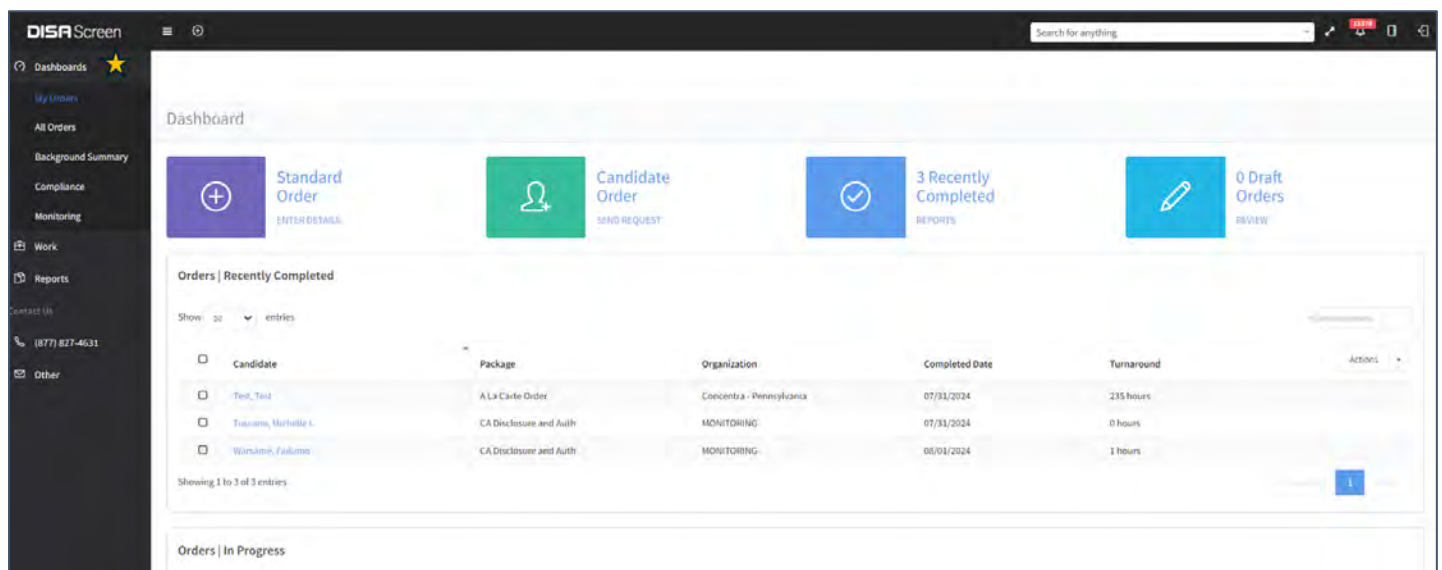
Navigation Pane

The Navigation Pane will allow access to your defined Dashboards from any screen by selecting “Dashboard” at the top of the menu.

Dashboards

Click on ‘Dashboards’ to expose all dashboards available to you.

“All Orders” is the main dashboard allowing users who have access to the orders associated to the locations the user has access to. This dashboard may vary by user as they are assigned according to the individual’s specific access.



Work - Queue

- Clicking into ‘Work’ will expose your Orders page, which is a listing of all orders you have access to, including Archived orders.
 - Search functionality.
 - There is a search field in the upper right-hand corner you can use to find a candidate by either first or last name.

Orders

Filters

Show 50 entries Search:

Candidate	Organization	Package	Status	Searches	Order Date	ETA/Completed
Clawson, Floyd H	FL - Jacksonville	Support Staff Package	Cancelled	0 / 0 Searches Completed	3/8/2021 10:08 AM	Unknown
Sally, Harry A	CA - Central Valley	Support Staff Package	Candidate Entry	0 / 4 Searches Completed	3/8/2021 9:22 AM	Unknown
Smith, Janis A	CA - Central Valley	Support Staff Package	Submitted	1 / 4 Searches Completed	3/3/2021 1:00 PM	3/8/2021 1:04 PM
Simon, Carly	Medical Center	Support Staff Package	Completed	5 / 6 Searches Completed	3/2/2021 12:54 PM	3/3/2021 3:31 PM
Start, Tony	FL - Tampa	All - State population testing	Submitted	12 / 15 Searches Completed	2/26/2021 2:59 PM	3/1/2021 3:00 PM
Coughlin, Jean J	CA - Central Valley	Support Staff Package	Submitted	2 / 4 Searches Completed	2/26/2021 1:22 PM	3/1/2021 1:26 PM
Sansom, Melissa R	CA - Central Valley	Support Staff Package	Cancelled	0 / 0 Searches Completed	2/26/2021 1:21 PM	3/1/2021 1:22 PM
Banner, Bruce	FL - Jacksonville	All - State population testing	Completed	15 / 15 Searches Completed	2/24/2021 3:27 PM	2/24/2021 4:03 PM
Rominoff, Natasha	FL - Jacksonville	All - State population testing	Completed	18 / 18 Searches Completed	2/24/2021 1:07 PM	3/2/2021 1:59 PM
Doe, John A	CA - Central Valley	Support Staff Package	Submitted	2 / 4 Searches Completed	2/24/2021 12:08 PM	2/27/2021 12:09 PM
Candidate, Melissa A	CA - Central Valley	Support Staff Package	Completed	4 / 4 Searches Completed	2/24/2021 10:42 AM	2/24/2021 12:56 PM
Doe, John A	CA - Central Valley	Support Staff Package	Submitted	3 / 4 Searches Completed	2/24/2021 10:41 AM	2/27/2021 10:49 AM
Right, Harry A	CA - Central Valley	Support Staff Package	Client Review	1 / 4 Searches Completed	2/24/2021 10:39 AM	Unknown
Doe, James E	CA - Central Valley	A La Carte Order	Submitted	0 / 1 Searches Completed	2/22/2021 2:22 PM	2/25/2021 2:22 PM

- You can use “Filters” in the upper left-hand corner to refine your Orders.
 - Available filters include:
 - Locations
 - Viewable by permission-based user settings.
 - If you don’t see a location, you should have access to, reach out to the Admin of your account to have them edit your user settings.
 - Status
 - The final status of an order.
 - I.e., Pending, Completed, Cancelled.

Orders

Filters

Organization: Medical Center Package: All Status: Completed Include Archived Orders:

Show 50 entries Search:

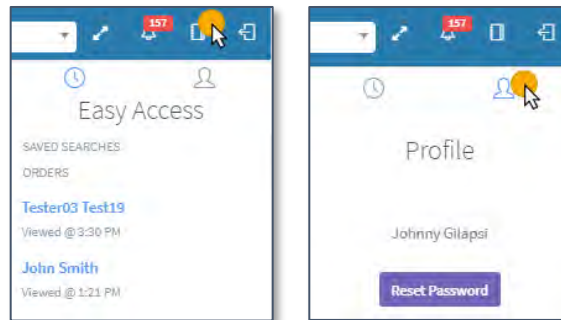
Candidate	Organization	Package	Status	Searches	Order Date	ETA/Completed
Simon, Carly	Medical Center	Support Staff Package	Completed	5 / 6 Searches Completed	3/2/2021 12:54 PM	3/3/2021 3:31 PM
Pepper, Feltz	Medical Center	A La Carte Order	Completed	1 / 1 Searches Completed	2/17/2021 2:48 PM	2/17/2021 2:49 PM
Diaz, Rosa	Medical Center	Support Staff Package	Completed	5 / 5 Searches Completed	1/25/2021 11:51 AM	1/25/2021 11:59 AM
Berry, Angela	Medical Center	A La Carte Order	Completed	17 / 17 Searches Completed	8/21/2020 5:23 PM	8/28/2020 9:40 AM

- Reports
 - Available based on user profile.
- DISA Support:
 - Phone number to your Support team.
 - Email to your Support team.

Header



- The three white lines collapse your menu to the left, to create more workroom on your screen.
- The plus sign is for adding orders.
- The search field, or “Omni Search,” is a quick look-up to locate a specific candidate’s order by name, date of birth, order number, social security number, etc.
- The two diagonal arrows make your workspace go to full screen.
- The bell is for notifications, coming from the system or a researcher.
- The book is your “Easy Access” for recently viewed orders.



- The exit symbol logs you out of DISAScreen.

Workspace

Orders | Need Attention

- This section is for orders that need your attention.
- Candidate orders that need final review will be in this section.
- The Info column will give a brief description of the action needed on your part.

Candidate	Package	Organization	Ordered By	Ref Code	Info
Smith, John F.	Nurse Package	FL - Jacksonville	Gilapsi, Johnny	Reference Code:None	
Allen, Tabitha A.	Clinical Package - Promedica	FL - Jacksonville	Gilapsi, Johnny	Reference Code	Candidate Order needs review. Cancel
Birdwell, Albert V.	Medical Professional Package	CA - Central Valley	Gilapsi, Johnny	Reference Code-	Candidate Order needs review. Cancel
Black, Jack L.	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code	Candidate Order needs review. Cancel
Brashears, James S.	Medical Professional Package	CA - Central Valley	Gilapsi, Johnny	Reference Code-	Candidate Order needs review. Cancel

Showing 1 to 10 of 185 entries

1 2 3 4 5 ... 18 Next >

Orders | Recently Completed

- All recent orders completed.
- View multiple reports at a time.
- Archive a candidate's report.

Orders Recently Completed								Filter these orders
Candidate	Package	Organization	Ordered By	Ref Code	Completed Date	Turnaround	Actions	
<input checked="" type="checkbox"/> Baker, John F	Support Staff Package	CA - Central Valley	Gilapsi, Johnny	Reference Code	03/07/2021	0 hours	Select All View Reports Archive Batch Download	
<input type="checkbox"/> Simoni, Carly	Support Staff Package	Medical Center	Gilapsi, Johnny	Reference Code	03/03/2021	26 hours		
<input checked="" type="checkbox"/> Baker, John F	Nurse Package	FL - Jacksonville	Gilapsi, Johnny	Reference Code	02/25/2021	3044 hours		
<input type="checkbox"/> Candidate, Melissa A	Support Staff Package	CA - Central Valley	Gilapsi, Johnny	Reference Code	02/24/2021	0 hours		
<input checked="" type="checkbox"/> Doe, John F	A La Carte Order	CA - Palm Springs	Martin, Justin	Reference Code	02/18/2021	0 hours		
<input type="checkbox"/> Spanno, Jessie A	Support Staff Package	CA - Central Valley	Gilapsi, Johnny	Reference Code	02/18/2021	0 hours		

Orders | In Progress

- This gives a snapshot of all open orders that are in progress and shows how many searches are completed and how many are pending – as well as an estimated completion date.

Orders In Progress								Filter these orders
Candidate	Package	Organization	Ordered By	Ref Code	Order Date	Progress	ETA	
Dups, John F	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code:None	N/A	1/18 Searches Completed	N/A	
Doe, John F	A La Carte Order	CA - Central Valley	Smith, Jane	Reference Code	N/A	3/6 Searches Completed	N/A	
Smith, Jason Jay	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code:OPS03	10/23/2018	3/5 Searches Completed	10/26/2018	
Parks, Mary Jane	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code:OPS02	10/23/2018	4/10 Searches Completed	10/26/2018	
Fernandez, Dorrie A	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code:OCH01	10/23/2018	3/4 Searches Completed	10/26/2018	
Smith, Layla	Support Staff Package	Medical Center	Gilapsi, Johnny	Reference Code:OPS01	10/23/2018	2/3 Searches Completed	10/26/2018	
Manning, Tracy Lee	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code:None	10/30/2018	4/5 Searches Completed	11/02/2018	
Smith, John F	Medical Professional Package	Medical Center	Gilapsi, Johnny	Reference Code:None	10/31/2018	4/7 Searches Completed	11/03/2018	
Doe, John Frank	Nurse Package	Medical Center	Gilapsi, Johnny	Reference Code:None	11/05/2018	1/2 Searches Completed	11/08/2018	
White, Tamara	Nurse Package	Medical Center	Gilapsi, Johnny	Reference Code:None	11/05/2018	3/4 Searches Completed	11/08/2018	

Showing 1 to 10 of 262 entries

1 2 3 4 5 27 Next >

Orders | Not Submitted

- The names in blue are Candidate Orders or Draft Orders that you may act on
 - Review and submit to our researchers.
 - Cancel[‡] the report for any orders no longer needed.
- The names in black are Candidate Orders that have been submitted which have not been completed by the candidate.
 - You can cancel[‡] the report before they can complete it if needed.

Orders Not Submitted						
Show 10 entries Filter these orders						
Candidate	Package	Organization	Ordered By	Ref Code	Created	
Candidate, James A	Support Staff Package	CA - Central Valley	Gilapsi, Johnny	Reference Code-Selenium-DONOTCHANGE:None;Locations:None	3/11/2021 11:28 AM	Cancel
Sally, Harry A	Support Staff Package	CA - Central Valley	Gilapsi, Johnny	Reference Code-Selenium-DONOTCHANGE:None;Locations:None	3/8/2021 9:22 AM	Cancel
Brown, Wayne A	Support Staff Package	CA - Central Valley	Gilapsi, Johnny	Reference Code-Selenium-DONOTCHANGE:None;Locations:None	3/5/2021 10:43 AM	Cancel

Showing 1 to 6 of 6 entries < Previous 1 Next >

[‡]Canceling may still incur some charges on your monthly invoice, since instant, integrated searches are completed and charged during the ordering process, to generate jurisdictions on criminal search types.

Submitting Orders within DISAScreen

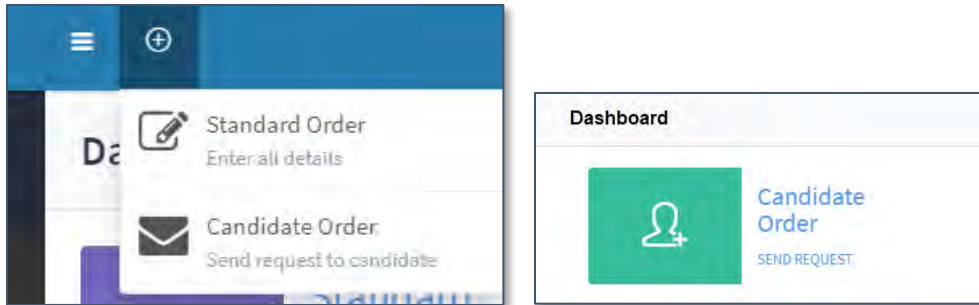
Depending on company setup. Users may have a variety of ways to place orders, see below.

- A. Candidate Order** –Minimal data entry required for the user. Send an email to the candidate to submit their application. All consent and disclosure forms will be electronically signed.
When will I use this Order type?
New Hire/Offer Extended which collects the required FCRA authorizations and disclosure forms.
- B. Mini Order** – An order that can be placed specifically for MVR's (driving history reports). This order selection will not require you to input all of the candidate's information (i.e. SSN/Address/Etc.)
When will I use this Order type?
When you do not need to send a candidate a package order and require them to complete the disclosures and authorization forms.
- C. Standard Order** – An order manually entered by you, the Ordering User.
When will I use this Order type?
The user will be required to enter in all of the candidate information (Name/DOB/SSN/Address/etc.). Using this method of ordering, each user will need to obtain the candidate disclosure and consent documents. DISA always recommends that you upload these documents to the profile while ordering.

Submitting a Candidate Order

There are two options to initiate an order which will send the candidate an invitation to complete a background check.

- From any screen, you can click on the plus sign in the top header to start a new order:



- You can also start a new Candidate Order and send a request from your dashboard by clicking on the green candidate icon:

Candidate Order Details

- Information you must provide:
 - Candidate information
 - FCRA required fields.
 - Optional fields
- Click the blue “Submit Order” button.

Candidate Order

Candidate First Name *
Legal first name

Candidate Middle Name
Legal middle name

Candidate Last Name *
Legal last name

Delivery Method *
 Email

Candidate Email Address *
Valid email address

Mobile Phone
() - -

Branch *
Select Branch

Package *
Select Package

Additional Products

Additional Details

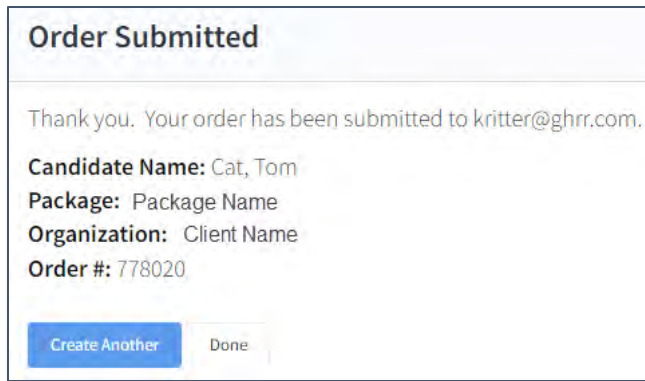
Title
Position title

Expected Salary Range
Select Salary Range

Position Location (City, State)

Submit Order

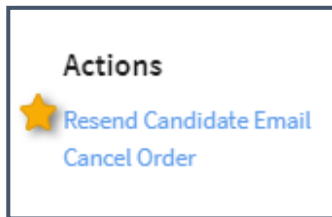
- You will get a confirmation page that your order was submitted, along with the order number assigned to the candidate.



Candidate Orders FAQs

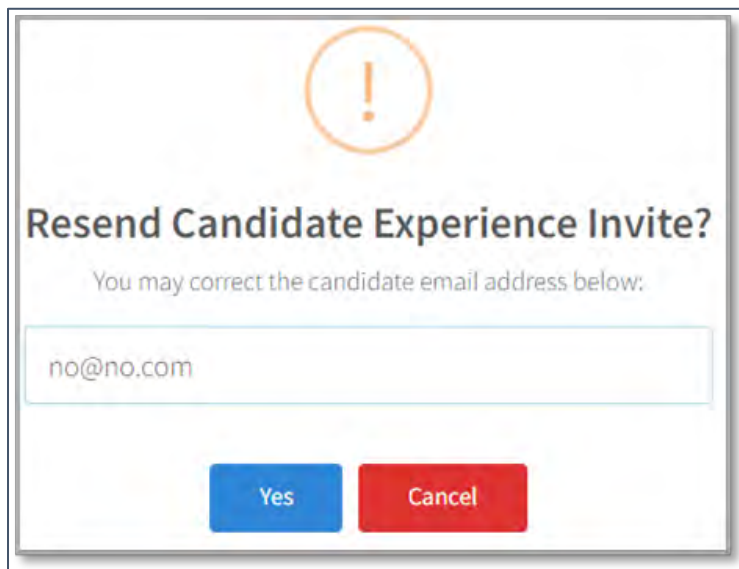
What if my candidate deleted the email with the link to fill out the application?

- From the Home Screen/Dashboard, click on "Orders" on your left charcoal menu bar.
- Find and click on the candidate's name or do a name search.
- On the right side of the candidate order, under "Actions" and click "Resend Candidate Email".




What if I mistyped the email to the candidate?

- From the Home Screen/Dashboard, click on "Orders" on your left charcoal menu bar.
- Find and click on the candidate's name.
- On the right side of the candidate order, under "Actions" and click "Resend Candidate Email".
- The pop-up box allows user to correct the candidates email address before resending.



How do I find out if I mistyped the candidate's email?

- From the Home Screen/Dashboard, click on "Orders" on your left charcoal menu bar.
- Find and click on the candidate's name.
- Click on the candidate's name from the Order Level.
- Once you click on the candidate's name the order details will fly-out to the right. Here you can review if the email was mistyped.

Candidate: [Bond, James](#) 

Candidate Info:	Job	Candidate Order - Candidate Entry	Actions
DOB: N/A SSN: No SSN Address: No Address Provided	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Cost Center: None	Order Id: 282584 Organization: HR Ordered By: Deanna Plisko Package: Basic Package Created: 5/24/2021 12:40 PM ETA: Unknown	Resend Candidate Email Cancel Order

Bond, James	
Candidate Name	Bond, James
Social Security Number (SSN)	No SSN
DOB	N/A
Can Contact	Yes
Address	No Address Provided
Email	jbond007@test.com
Phone	No Phone Provided

How to track individual candidate activity:

DISAScreen will track actions taken by both Client users, candidates and DISA researchers. To find the activities follow the below steps:

- Locate the candidate's pending order, click their name to navigate to their order profile.
- Once inside the candidate's profile, click on 'Activities'. Here you will find actions taken on the order.

Details		Activities	Documents	Cost
Activity History				
When	What	Applies To	Details	
5/1/2020 5:22 PM	Client Note	Order 75490	Created candidate order. (Link: /candidate/start?oid=65f78c3d-d2ad-44fb-b331-1e79d13163cc)	
5/1/2020 5:43 PM	Client Note	Order 75490	Candidate logged in using PIN to complete order. Details: Mozilla/5.0 (Linux; Android 9; SM-G892A) AppleWebKit/537.36 (KHTML, like Gecko) Chrome Mobile Safari/537.36	
5/1/2020 5:44 PM	Client Note	Order 75490	Candidate agreed to electronic signature usage. (Details: Mozilla/5.0 (Linux; Android 9; SM-G892A) AppleWebKit/537.36 (KHTML, like Gecko) Chrome Mobile Safari/537.36)	

The activities log will list the date and time the original email and reminder email were sent to the candidate. If they have logged in, this will also be notated as in the above screen example.

How long does the candidate have before the link expires?

- The link will expire after 30 days

Will the candidate receive a reminder email if they do not complete the link?

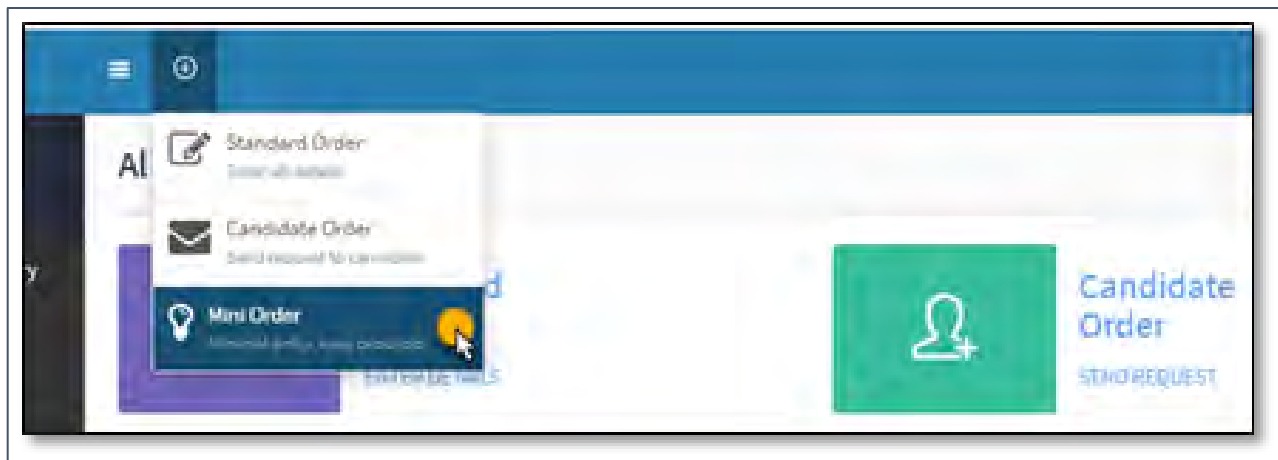
- Yes, the candidate will receive a reminder every other day after the order was created.

How do I know once the applicant completes the request?

- You will receive an email notification and the order will automatically be submitted to DISA for processing.

Submitting a Mini Order

From any screen, you can click on the plus sign on the blue menu bar to start a new order:



Mini Order Details

- Information you must provide will be minimal on this ordering type:
 - Required fields.
 - Branch/Region
 - No Package just select *additional products* to select the a la carte product needed.
 - Candidate First & Last Name
 - Product specific required fields (i.e. MVR – DL # and DL state)

The screenshot shows the 'Mini Order' form. On the left, there are fields for 'Branch' (Dulles - New Jersey), 'Candidate First Name' (John), 'Candidate Email Address', 'Candidate Middle Name', 'Candidate Last Name' (McClane), and 'Date of Birth'. Below these is the 'Occupational Health info' section with a 'Reason for Drug Test' dropdown menu. On the right, there is a 'SHOPPING CART' section with a table showing 'Additional Products'.

Item	Quantity	Total
IS Panel (Panel) - Client	1	\$27.00
Current Price*		\$27.00

Review and Submit

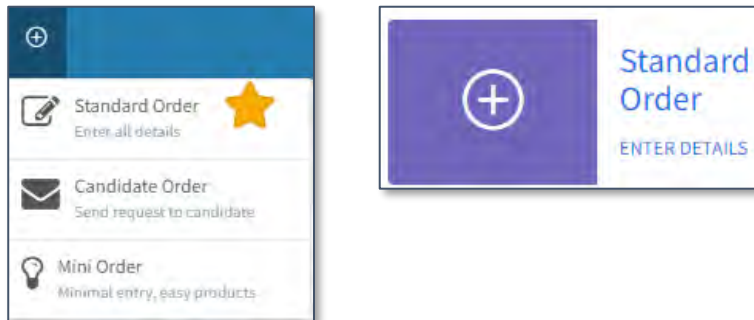
Before you submit the mini order:

- Review the order details for accuracy.
- Agree to the certification and submit.

The screenshot shows the 'Certification' page. It contains a list of five bullet points regarding the use of consumer reports for employment purposes. At the bottom, there is a checkbox labeled 'I agree to the certification above' and a blue 'Submit Order' button. A yellow arrow points to the 'Submit Order' button.

Submitting a Standard Order

From any screen, you can click on the plus sign in the blue menu bar to start a new order:
Or, from your Dashboard, you can click on the purple plus icon to start a new Standard order:



Standard Order Details [Tab 1]

Create Order

1. Order Details 2. Candidate 3. Search Details

Package Information

Branch * Package * Additional Products

Select Branch Select Package

Cost Center

Select one

Position Information

Title Expected Salary Range Position Location (City, State)

Position title Select Salary Range

[Continue](#)

- Information you must provide:
 - Required fields.
 - **Branch** is the group/region placing the order.
 - **Package** or additional products as a la carte orders. Choose “No Package” if you are not ordering a package. “Additional Products” can also be used with existing packages.
 - Optional fields
- Clicking on “Continue” will bring you to tab 2, Candidate Information

Candidate Information [Tab 2]

The screenshot shows a web form for entering candidate information. At the top, there are three tabs: 'Order Details', 'Candidate', and 'Search Details'. The 'Candidate' tab is active. The form includes the following fields:

- Legal First Name ***: James
- Legal Middle Name ***: [Redacted] with a checkbox for 'No middle name provided' (checked).
- Legal Last Name ***: Dean
- Suffix**: [Empty]
- Address ***: 1 Main St
- Address Line 2**: [Empty]
- ZIP code ***: 33901 (FORT MYERS, FL, USA)
- City ***: FORT MYERS
- State ***: Florida
- Date of Birth ***: 01/01/1980
- Social Security Number ***: [Redacted]
- Phone Number**: (900) 500-5000 Ext 30000
- Mobile?**:
- Email ***: test@test.com
- Can Contact?**:
- Send Completed Report?**:

Below the main form are two sections: 'Additional Names Used/Alias' and 'Previous Addresses', each with an 'Add' button. At the bottom, there are 'Back', 'Save Draft', and 'Continue' buttons.

Required Information:

- Candidate fields
 - Optional fields
- Clicking on "Continue" will bring you to tab 3, Candidate Information

Search Details [Tab 3]

Look through the selected product summaries here. Some searches may require additional information. For Example, MVRs require the driver license number.

The screenshot shows the 'Search Details' tab in the shopping cart. It displays a list of selected products with checkboxes and expand/collapse icons:

- National Database (Smith, Jane D) [+]
- National Sex Offender (Smith, Jane D) [+]
- 2 Statewide Criminal (Smith, Jane D) [+]
- Statewide Criminal (Smith, Jane D; MO) [-]
- Statewide Criminal (Smith, Jane D; AR) [-]
- FACIS - Level 1M (Smith, Jane D) [+]
- SSN Trace (XXX-XX-8789)

At the bottom, there are 'Back', 'Save Draft', and 'Review & Checkout' buttons.

The shopping cart on the right shows the following items:

Item	Quantity	Total
Package (Missouri Non-Licensed Package)		
FACIS - Level 1M		
National Database		
National Sex Offender		
SSN Trace		
Statewide Criminal		
Additional Products		
Statewide Criminal		
Product Instance Fees		
Statewide Criminal, AR		
Statewide Criminal, MO		
Current Price*		

Order Review Page

This will be the final step before an order is submitted to DISA researchers.

- Review the order on the Order Review Page.

Order Review: Smith, John		
Order Details		
Item	Details	SubTotal
Nurse Package Package: John Smith		\$115.00
	County Criminal (PINELLAS, FL) National Database (National) National Sex Offender (National) MVR - Driving History (AL) Employment (Walmart) Education (University of Minnesota - Twin Cities) Professional License ()	
Product Instance Fees		
MVR - Driving History: AL		\$10.50
Current Cost*		\$125.50

*Additional court and/or third party fees may be applied.

- Below the order details, you can add notes and documents to the order.
 - To utilize these options, Click on the Notes and Documents.

[Notes and Documents](#)

Certification

By checking this box and clicking the "Submit Order" button to the right, I certify that:

- I am requesting a consumer report for an employment purpose as defined under the Fair Credit Reporting Act and defined by the Federal Trade Commission.
- I further certify that a clear and conspicuous stand-alone disclosure, in a document consisting solely of the disclosure, has been made to the consumer.
- The disclosure satisfied all requirements identified in the Fair Credit Reporting Act. All other required disclosures under other applicable state and local laws were also provided.
- I have also obtained the written authorization of the consumer to conduct a background check. I certify that I will also comply with the adverse action requirements of the Fair Credit Reporting Act and applicable state laws.
- I agree to abide by all equal employment opportunity laws when using any consumer report information.

I agree to the certification above

- You will also be able to view the documents you previously uploaded once you click on Notes and Documents.

[Notes and Documents](#)

Activity History

When	What	Who	Applies To	Details
------	------	-----	------------	---------

Add Note
Comment

All Documents

When	Type	File	Uploaded By	Applies To
9/14/2020 10:55 AM	Release	TEST.docx	Training User	Order

Add Document
Document Type

File
 No file chosen

- You may add notes, on the left, such as ‘Candidate is out of town, please contact ordering user with questions’, which will be posted to all searches in the order and will be seen by the researchers.
- You may add documents, on the right, Authorization forms or any document a candidate provides that you want to keep with their profile such as a copy of a driver’s license, which will post to all searches in the order and seen by the researchers.

Notes and Documents

Certification

By checking this box and clicking the "Submit Order" button to the right, I certify that:

- I am requesting a consumer report for an employment purpose as defined under the Fair Credit Reporting Act and defined by the Federal Trade Commission.
- I further certify that a clear and conspicuous stand-alone disclosure, in a document consisting solely of the disclosure, has been made to the consumer.
- The disclosure satisfied all requirements identified in the Fair Credit Reporting Act. All other required disclosures under other applicable state and local laws were also provided.
- I have also obtained the written authorization of the consumer to conduct a background check. I certify that I will also comply with the adverse action requirements of the Fair Credit Reporting Act and applicable state laws.
- I agree to abide by all equal employment opportunity laws when using any consumer report information.

I agree to the certification above

You must agree with user certification

- Edit Order
 - To go back and edit the order for any reason, you can click on the white “Edit Order” button.
- Certification of FCRA requirements should be read and confirmed by clicking the checkbox.
 - Once you agree to the terms, the “Submit Order” button will darken and allow you to click.

Order Submitted Page

- Once you have completed the order you can:
 - Click on the order number to see the order you just placed.
 - Click “Create Another” to start a new order.
 - Click “Done” to go back to your Dashboard.

Submitting an A La Carte Order

- Select Standard Order from either your dashboard or your plus sign.
- For “Package,” select “No Package.”
- Click on “Additional Products”.

Create Order

1. Order Details 2. Candidate 3. Search Details

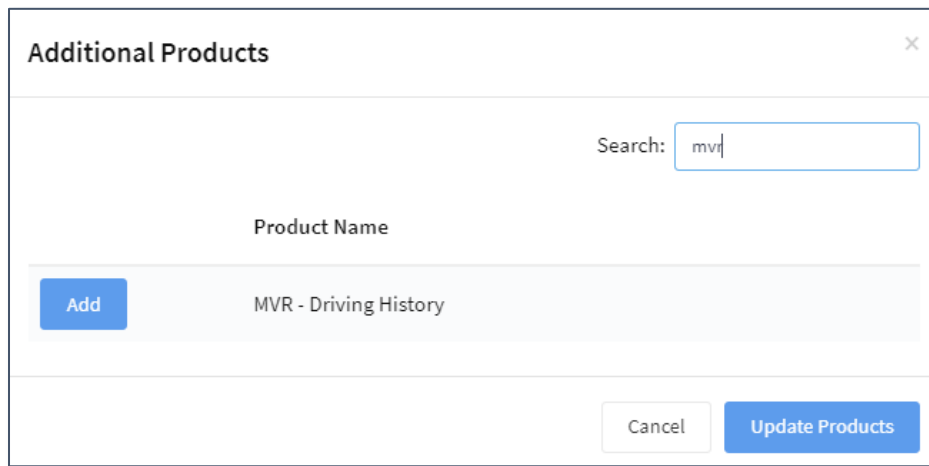
Package Information

Branch *
HR

Package *
No Package

Additional Products

- Find the product you want, click “Add” next to it.
- When you have all the products you want, select “Update Products.”



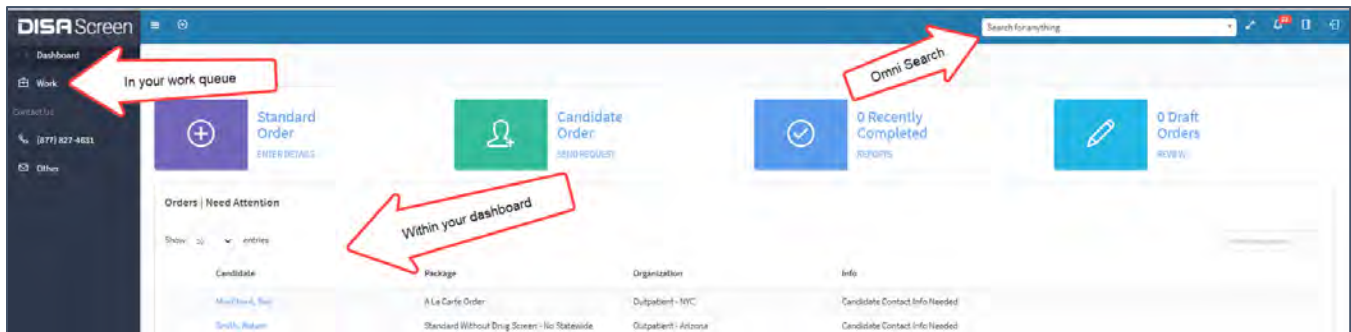
- Complete order like normal from there, putting in the candidate information, etc.

Managing Orders

Locating Orders

Locating orders can be done multiple ways:

- Utilizing the omni search function, within your blue menu bar
- Work queue on the black menu bar.
- On your dashboard, within the various queues.99



How to track order statuses and Activities

Each order has an Activities tab where DISAScreen will track actions taken by both Client users, candidates and DISA researchers. To find the activities follow the below steps:

- Locate the candidate's pending order, click their name to navigate to their order profile.
- Once inside the candidate's profile, click on 'Activities'. Here you will find actions taken on the order.

Details	Activities	Documents	Cost	
Activity History				
When	What	Who	Applies To	Details
9/21/2021 5:24 AM	Client Note	Requesting User	Order (509393)	S State is MA.
9/21/2021 4:33 PM	Client Note	Researcher	Statewide Criminal MA (2701768)	The CORI form has not been uploaded for this candidate. Please provide a completed CORI release at your earliest convenience. Thank you!
9/23/2021 10:57 AM	Client Note	Researcher	Education Medfield Senior High School (2723008)	Faxed a request to Records; pending a 2-3 business day turnaround upon receipt of request.
9/27/2021 12:37 PM	Client Note	Researcher	Education Medfield Senior High School (2723008)	Left a voicemail with Guidance at the number provided on the school website.

The activities log will list the date and time of each researcher update on the searches, including ETAs and attempts made, as well as any Client placed notes.

Adding Searches to an Existing Order

Adding searches to an existing order should only be done in the event you forget to add a product to the original order, such as an education verification to a standard package.

You will need to run a new / complete background check on someone who previously applied and is applying again.

To add searches to the existing order, follow these steps below.

- Locate the candidate’s name in the system and select their name.
- On the right of the order header, there will be a link for ‘New Order for Candidate’ for packages, or ‘Add Search’ for a la carte items.

Add Search (this is to add a product(s) to a current order).

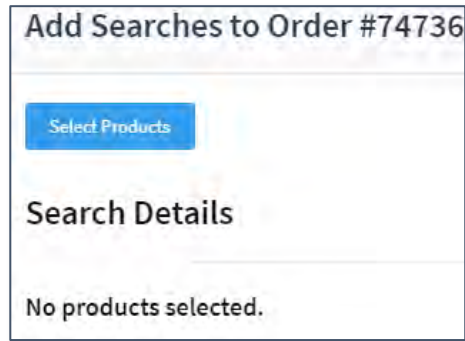
Adding searches to a report within DISAScreen can be done while an order is in progress or completed. If the order is in progress, searches can be added any time. If an order is complete, the user will only have 7 business days from the date the order is completed, to add searches.

- Click the “Add Search” link on the Order Level.

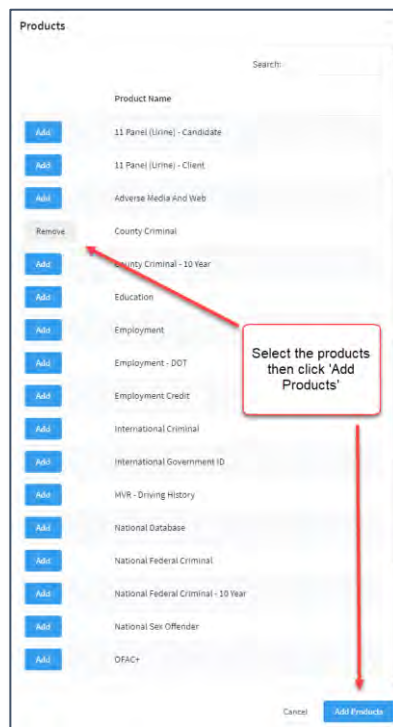
Candidate: [Fernandez, Donnie A](#)

<p>Candidate Info:</p> <p>DOB: 06/21/XXXX SSN: XXX-XX-1234 Address: 123 Main Street NEW PORT RICHEY, FL 34655</p>	<p>Job</p> <p>Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code: OCH01</p>	<p>Standard Order - Submitted</p> <p>Order Id: 2195 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Medical Professional Package Created: 10/23/2018 11:22 AM ETA: 10/26/2018 11:23 AM</p>	<p>Actions</p> <p>Request Status Update New Order for Candidate Add Search</p>
---	---	---	---

- Click “Select Products”.



- In the window that opens, select all products that you need to add.
- Click “Add Products”.



- Fill in any required fields.
 - **Example:** For MVR’s – enter in the driver’s license information.
- Click “Add Searches”
 - After you click ‘add searches; all new products will populate to the order.

New Order for Candidate (this will be to create a completely new order for this individual - You MUST be positive this is the same person before using this process)

A Standard Order will be initiated using this function. Ensure the Consent forms are captured during that initial Candidate order or have them uploaded in the new order.

- Click the “New Order for Candidate” link on the Order Level.

Candidate Info:	Job	Standard Order - Submitted	Actions
Candidate: Fernandez, Donnie A DOB: 06/21/XXXX SSN: XXX-XX-1234 Address: 123 Main Street NEW PORT RICHEY, FL 34655	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code: OCH01	Order Id: 2195 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Medical Professional Package Created: 10/23/2018 11:22 AM ETA: 10/26/2018 11:23 AM	Request Status Update New Order for Candidate Add Search

- This will take all the information on the candidate and make a new order with it.
- The screen will begin with the ‘Create Order’ screen, where you can select a package to process.
- Complete the required fields.
- Click “Continue”
- On the Candidate’s Information tab, all information will be pre-populated in all fields.
- Once you review the candidate’s information, if there are no changes click ‘Continue’ to get you to the ‘Search Details’ tab.
- Enter any additional information that may be required (i.e. employment, education, license, MVR information etc.)
- Once the information needed is added, click “Review & Submit.”
- If you are ready to place the order at this point, confirm the certification and click ‘Submit Order.’

Adding Documents

- Select the candidate order in which you want to add a document.
- Click on the “Documents” tab.

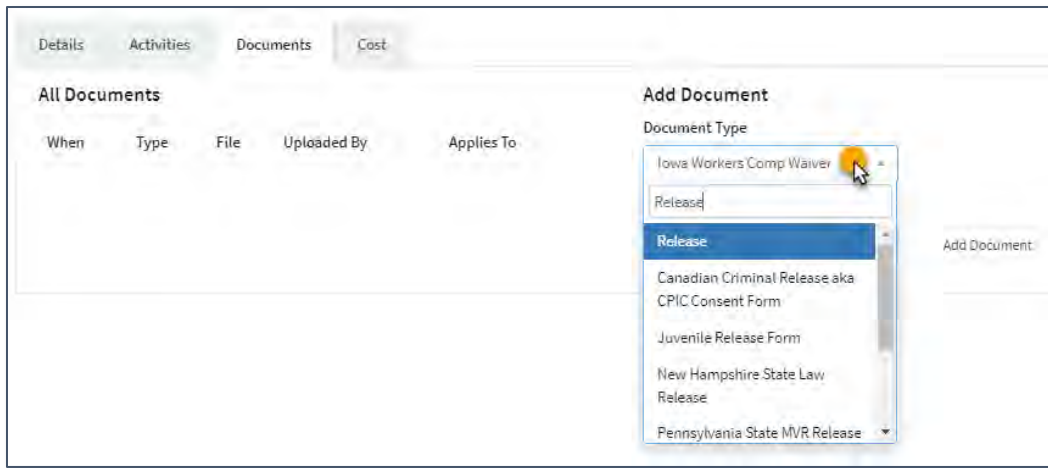
Candidate Info:	Job	Candidate Order - Submitted	Actions
Candidate: Smith, John F DOB: 01/01/XXXX SSN: XXX-XX-1234 Address: 555 TEST ST SAINT PETERSBURG, FL 33712	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code: None	Order Id: 2278 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Medical Professional Package Created: 10/29/2018 9:58 AM ETA: 11/3/2018 11:50 AM	Request Status Update New Order for Candidate Add Search

Details Activities **Documents** Cost

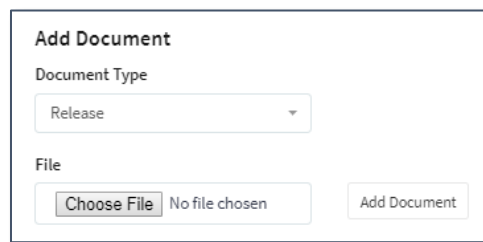
Order In Progress

[View Background Screen Report](#)

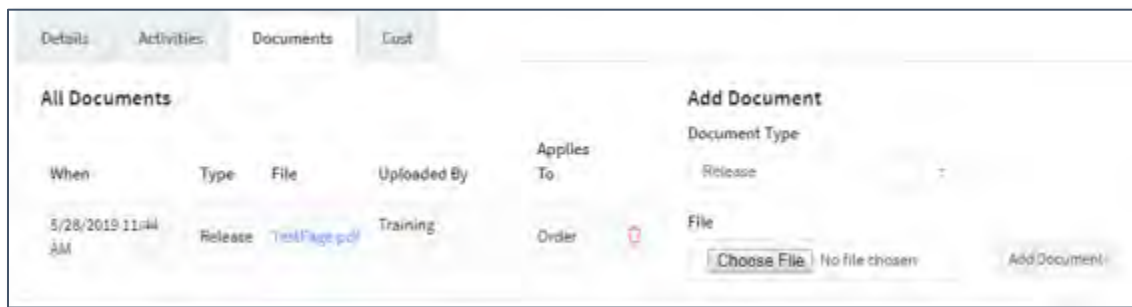
- Click on the Document Type drop-down menu and choose the name of the document. If it doesn’t appear on the list, you can type in the name of the document.



- Next, choose the file and find the document on your computer.



- Click on the “Add Document” button & the document will appear on the left attached to the order.



- The system will post the time of the upload, the document type (the name you gave/selected), the file name (and link), and who uploaded the document.
- If you made a mistake on the upload, the red trash icon will remove the document from the order.

Locating Documents

All documents available to the users with access will be accessible to view or download on the candidate’s order profile. To access any document, follow the below steps:

- Locate the candidate order.
 - Locating the order on your dashboard
 - Using ‘search for anything’ on your tool bar
 - Accessing ‘orders’ through your ‘work’ queue on the left menu bar
- Click on ‘Documents’ tab.
 - Review attachments and click on the one you’d like to view/download.

Candidate: [Simon, Carly](#)

Candidate Info:
 DOB: 02/02/XXXX
 SSN: XXX-XX-5555
 Address: 123 Fake Street
 FORT MYERS, FL 33913 US

Job
 Title: Not Provided
 Expected Salary: Not Provided
 Position Location: Not Provided
 Reference Code-Selenium-DONOTCHANGE: None
 Locations: None

Candidate Order - Submitted
 Order Id: 183048
 Organization: Medical Center
 Ordered By: Johnny Gilapsi
 Package: Support Staff Package
 Created: 3/2/2021 12:54 PM
 Completed: 3/3/2021 3:31 PM

Actions
[Request Status Update](#)
[New Order for Candidate](#)
[Add Search](#)

Details Activities Documents Cost

All Documents

When	Type	File	Uploaded By	Applies To
3/2/2021 12:55 PM	Document	Disclosure.pdf		Order
3/2/2021 12:55 PM	Document	Investigative Disclosure.pdf		Order
3/2/2021 12:56 PM	Document	California Disclosure.pdf		Order
3/2/2021 12:56 PM	Document	Authorization.pdf		Order
3/2/2021 1:03 PM	State-Specific Release	Example State Release.docx		Order
3/2/2021 1:07 PM	Client Added Doc	Example Client Doc.docx	Johnny Gilapsi	Order
3/2/2021 1:14 PM	Client facing from GHRR	Example Candidate Doc.docx		Order

Add Document
 Document Type: Iowa Workers Comp Waiver
 File: No file chosen

Click on document you wish to download

Notifications

The bell on the right side of your top blue menu bar will indicate system and order-related items. All unread notifications will start to tally in red.

- When you click on the bell, a short list will open with a summary of what notifications have been received.

157

Phone Outage Resolved
 GHRR has resolved the phone outage from Monday, April 22nd and we have resumed standard support operations.

Candidate Order Has Expired
 Candidate Order Link for Mobile, Candidate has expired. Please create a new order to proceed.

Order Complete
 Order for Rose, Kate is complete and the report is ready to view.

Order Complete
 Order for Rose, Kate is complete and the report is ready to view.

Order Complete
 Order for ICandidate, Smokescreen is complete and the report is ready to view.

[View all notifications](#)

- You can click on the “View all notifications” at the bottom which will take you to the Notifications inbox screen. As with standard email inboxes, you will have the ability to delete old notifications.

Notifications

Select All Mark as Read Delete Selected

Order Requires Review 9/18/2020 4:57 PM
 Order for Lightyear, Buzz has received a search result which requires your review.

Order Complete 9/21/2020 1:16 PM
 Order for Myers, Michael is complete and the report is ready to view.

If setup with email notifications, you will also receive emails for the following notifications:

Types of Notifications	Details of Notification
Completed Orders	Users will receive an email when an order is completed
Order needs information to proceed	User will receive an email that a specific order needs more information <ul style="list-style-type: none"> • Example: Release is needed, Fee approval, etc.
Candidate Order - link Expired	The user will receive an email that a link is going to expire for a candidate. Users will also receive a notification on their dashboard that the link is expired. From there, the user can initiate a new order for the candidate.
Candidate Order completed	User will receive an email that the order has been completed by the candidate and has been submitted to DISA for processing.

Request Status Update

Status requests can be done on orders that are in progress. Status requests are typically conducted when a user is looking for an update on an order or specific product. This type of communication goes directly to the researchers working on the products requested. DISA's team will respond with proper updates once they review the request.

You will want to locate the order under "Orders | In progress".

Candidate: [Fernandez, Donnie A](#)

<p>Candidate Info:</p> <p>DOB: 06/21/1900 SSN: XXX-XX-1234 Address: 123 Main Street NEW PORT RICHEY, FL 34655</p>	<p>Job</p> <p>Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code: OCH01</p>	<p>Standard Order - Submitted</p> <p>Order Id: 2195 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Medical Professional Package Created: 10/23/2018 11:22 AM ETA: 10/26/2018 11:23 AM</p>	<p>Actions</p> <p>Request Status Update New Order for Candidate Add Search</p>
---	---	---	---

- Click on 'Request Status Update'
- You will then receive a pop up to select what you want to request a status update on
- If you want to have an update on the Entire order, leave the Applies To field as 'Entire order.'
 - **NOTE:** Using Entire Order will generate an email to the DISA Support team who will review the overall order and respond to your inquiry via email.
- Type in the Additional Information box your message to DISA and click 'Send message.'

- If you want a status update on 1 or more searches, click on the applies to drop down and select 'Specific Searches'
 - **NOTE:** Using Specific Searches will add an activity to the order and alert the researcher working on that search. The researcher will review and respond to your inquiry via the Activities tab on your order.

- Select the search you want to request a status update.
- To select multiples, after selecting the first one, hold down the Ctrl button on your keyboard and click the other searches you wish to request a status update on

Request Status Update

In order for us to best service this request, please provide as much information as possible.

Applies To

Specific Searches

Searches

Hold Ctrl/Cmd to select multiple searches.

- Search ID: 406218 - 11 Panel (Urine) -Candidate (PreEmp)
- Search ID: 406209 - County Criminal (PASCO, FL)
- Search ID: 406210 - County Criminal (PINELLAS, FL)
- Search ID: 406216 - Education (A.T. Still University of Health Sciences)

Additional Information

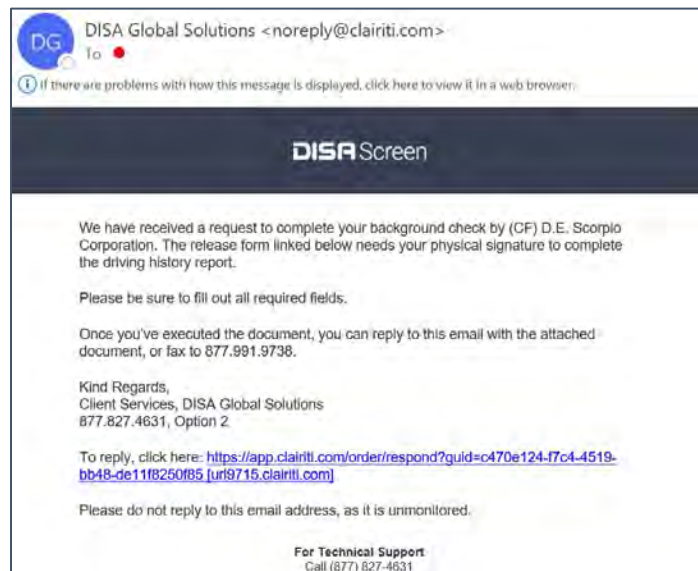
Close **Send message**

- Type in the Additional Information box your message to DISA and click 'Send message.'

Responding via secure email

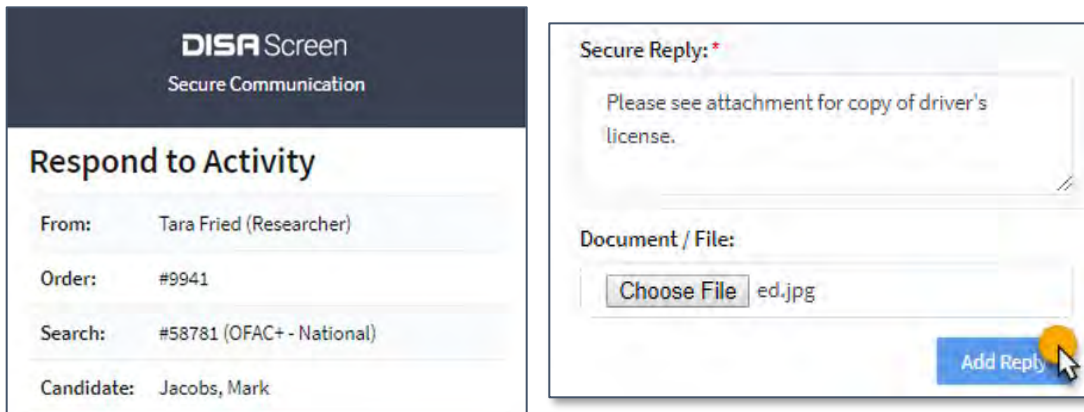
You will occasionally receive an email that requests assistance from your office for the researcher to complete a report. This could be the candidate's hand-signed release, their education documents, international identification, etc.

In this example, the researcher is requesting the required release form to complete the MVR request:

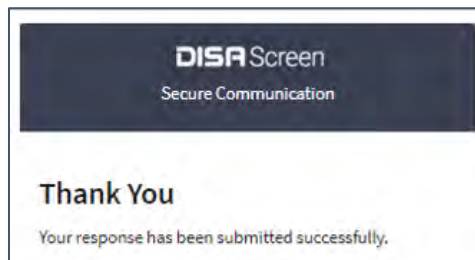


To reply:

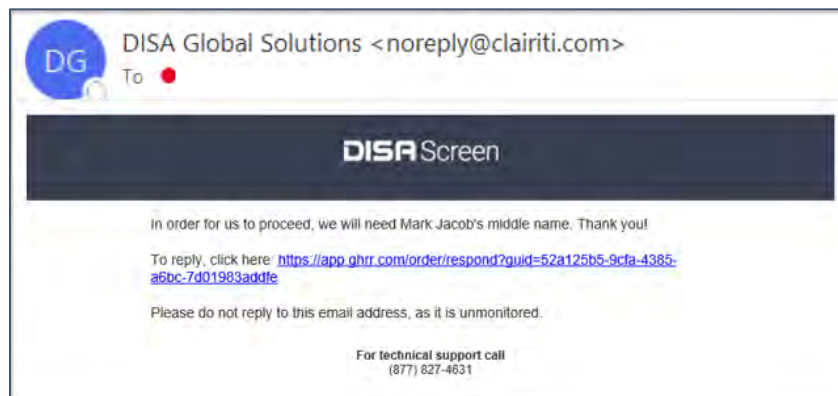
- Click on the link.
- The secure link will provide you with information about the order and give you a place to add a comment and the document requested.



- Type your response and upload the file requested and click “Add Reply.”
- You will receive a confirmation that it was sent to the researcher.



In this example, the researcher is requesting the candidate’s middle name.



To reply:

- Click on the link.
- The secure link will provide you with information about the order and give you a place to add a comment.

Respond to Activity

From: Tara Fried (Researcher)

Order: #9941

Search: #58781 (OFAC+ - National)

Candidate: Jacobs, Mark

Sent: 5/28/2019 12:18 PM

Subject: Client Communication

Message: Content: In order for us to proceed, we will need Mark Jacob's middle name. Thank you!

Secure Reply: *

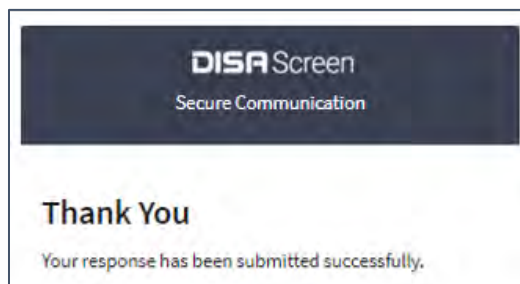
Gabriel

Document / File:

Choose File No file chosen

Add Reply

- Type your response, and click “Add Reply.”
- You will receive a confirmation that it was sent to the researcher.



If you do not want to pass the information on through the secure email, you may also log into DISAScreen and respond on the Order level for that candidate.

Adding Notes in DISAScreen

Some users may want to place notes on a candidate’s order. Notes can be added by any user who has access to the order. These notes will be visible to Client users and DISA users but are typically used when you want to simply add a comment to an order.

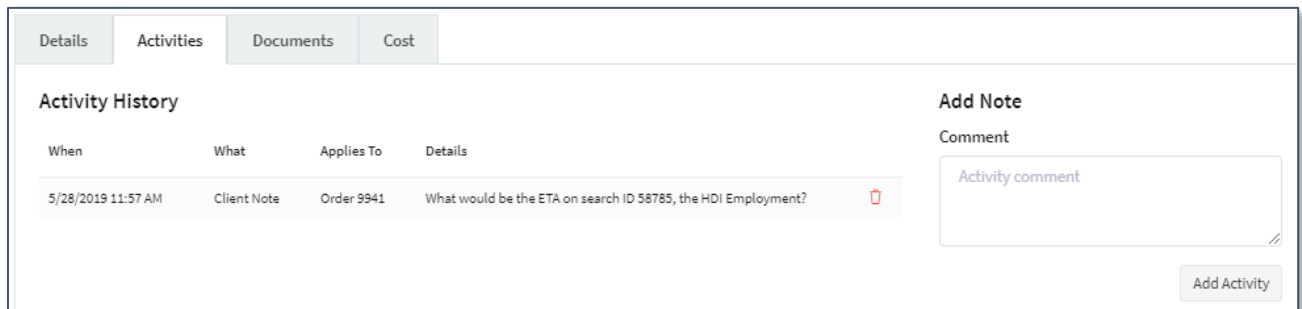
NOTE: Placing a note in this manner will not alert your DISAScreen Support or Researchers. To do so, please see the Request Status Update section.

Should the user wish to place a note on the order they may do so by following the below steps:

- Select the candidate order in which you want to add a note.
- Click on the “Activities” tab.



- Click into the field labeled “Comment.”
- Once you have your entire comment typed out, click the button “Add Activity”.



Viewing Completed Reports

To view completed orders, you can utilize your search tools (omni search, orders, and dashboard).

Once you locate the order you would like to review, click on the candidate’s name to be driven to the candidate profile.

- You will land on the details view of the candidate profile. This view will provide a quick glance of results.
- To view specific details, click into the final report you would like to view.
 - Background Screen Report: Results for domestic criminal and verification search types.
 - Occ Health: Results for occupational health search types.
 - Credit Report: Results for credit reports.

Candidate: [Simon, Carly](#)

Candidate Info:	Job	Candidate Order - Submitted	Actions
DOB: 02/02/0000 SSN: XXX-XX-5555 Address: 123 Fake Street FORT MYERS, FL 33913 US	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code-Selenium-DONOTCHANGE: None Locations: None	Order Id: 183048 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Support Staff Package Created: 3/2/2021 12:54 PM Completed: 3/3/2021 3:31 PM	Request Status Update New Order for Candidate Add Search

Order In Progress

[View Background Screen Report](#)
[View OccHealth Report](#)

Search ID	Product	Details	Name	Status	Additional Information	View Results
1023022	County Criminal	LEE, FL	Simon, Carly	Complete	None	View Results
1023018	National Database	National	Simon, Carly	Complete	None	View Results
1023019	National Sex Offender	National	Simon, Carly	Complete	None	View Results
1023020	Statewide Criminal	FL	Simon, Carly	Complete	None	View Results
1023021	SSN Trace		Simon, Carly	Complete	None	
1032336	Education	University of Central Florida	Simon, Carly	In Progress	We'll do our best to expedite this request.	
1048113	S Panel (Urine)	Pre-Employment	Simon, Carly	Complete	None	View Results

Identifying and Viewing Discrepancies

Discrepancies will be identified within the final report by an orange 'eye' icon. You can click on the icon and the system will take you to the search details, outlining the discrepancies found.

Search ID	Search Type	Name Searched	Status
407304	County Criminal - HILLSBOROUGH, NH	Miller, Patrick James	Complete
407322	County Criminal - MERRIMACK, NH	Miller, Patrick James	Complete
407323	County Criminal - ROCKINGHAM, NH	Miller, Patrick James	Complete
407309	National Federal Criminal - National	Miller, Patrick James	Complete
407308	National Database - National	Miller, Patrick James	Complete
407310	National Sex Offender - National	Miller, Patrick James	Complete
407307	MVR - Driving History - NH - 3 Year	Miller, Patrick James	Complete
407311	OFAC+ - National	Miller, Patrick James	Complete
407312	SSN Trace - National	Miller, Patrick James	Complete
407305	Education - Plymouth State University	Miller, Patrick James	Complete

Example: County criminal record

Criminal & Public Records						
Jurisdiction: HILLSBOROUGH, NH		Record Type: County Criminal			Name on Case: Patrick Miller	
Case Number	Charge	Charge Date	Charge Type	Disposition	Disposition Date	
12335481	DUI	04/15/2004	Felony	Guilty	04/15/2004	
Identifiers: First Name, Last Name, DOB			Sentence Info: Not provided.			

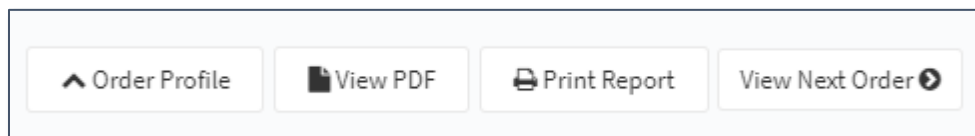
Viewing Multiple Orders

To view multiple completed orders, scroll down to your **'Orders | Recently completed.'**

- Highlight all the Orders you would like to view.
- Click on the 'Actions' drop down.
- Select 'View Reports'

Orders Recently Completed					
Show: 50 entries					
Candidate	Package	Organization	Completed Date	Turnaround	Actions
<input checked="" type="checkbox"/>	NHC State population testing	FL - Jacksonville	02/24/2021	1 hours	Select All View Reports Archive Batch Download
<input checked="" type="checkbox"/>	Support Staff Package	CA - Central Valley	03/10/2021	0 hours	
<input checked="" type="checkbox"/>	Support Staff Package	CA - Central Valley	02/24/2021	0 hours	

Once you follow the action steps you will be able to View the orders selected, by clicking on **'View Next Order'**



Other actions you can take from this screen:

- Order Profile – Takes you to the candidate order profile view.
- View PDF – This allows you to view the report in a PDF version.
- Print Report – The ability to print the report for your records.

Archiving orders

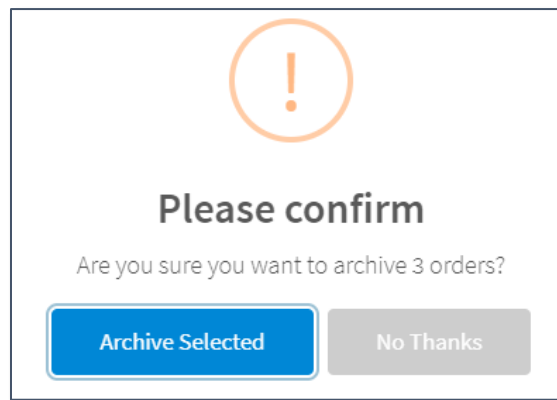
To archive an order on multiple orders, scroll down to your **'Orders | Recently completed.'**

- Check mark the order(s) that you want to Archive.
- Click on the 'Actions Drop Down'
- Select 'Archive'

Candidate	Package	Organization	Completed Date	Turnaround
<input checked="" type="checkbox"/> Wesley Church	NHC State population testing	FL - Jacksonville	02/24/2021	1 hours
<input checked="" type="checkbox"/> Suzanne Gault H	Support Staff Package	CA - Central Valley	03/10/2021	0 hours
<input checked="" type="checkbox"/> Cynthia Melissa A	Support Staff Package	CA - Central Valley	02/24/2021	0 hours

You will then receive a notification to confirm if you want to Archive the orders that you selected.

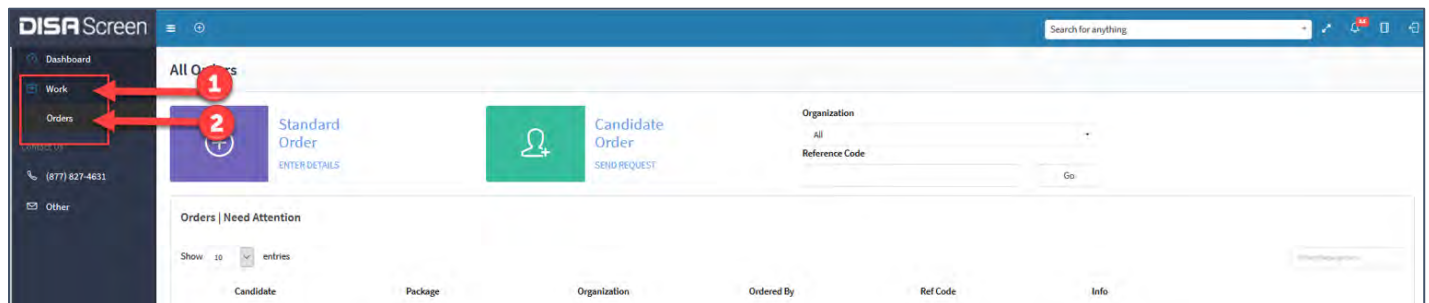
- Click on 'Archive selected' to Archive the order(s).
- If a mistake was made, click 'No thanks' and you will be brought back to your dashboard.



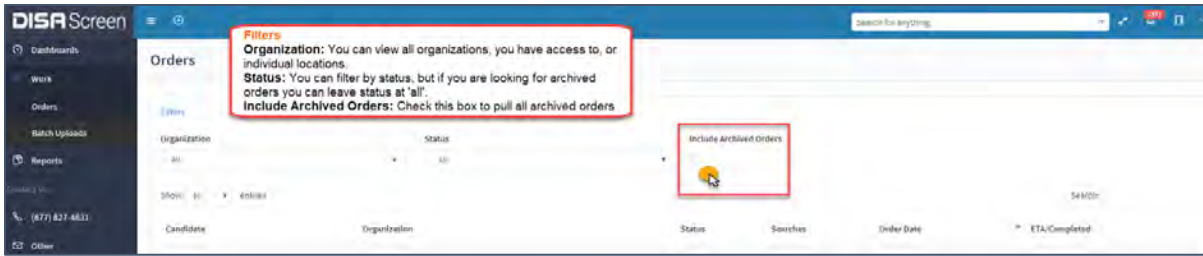
Locating Archived Reports

To pull up archived orders within DISAScreen, please follow the below steps:

- Click on the 'Work' queue, within the Navigation Pane
- Click on 'Orders', within the work queue.



- Once the order screen appears, apply your desired filters.
 - Organization: Filter by all (all locations you have access to) or by individual location.
 - Status: You can leave 'all' or select desired status to check.
 - Include Archived Orders: Check the box to include archived orders.



Grading

Orders processed through DISAScreen will leverage the Grading process. Each search will be pre-adjudicated by DISA (Tier 1 or Tier 2 set for each product result).

Client's approved adjudicator will set the Final Grade to each report.

- Final grade can only be set once all products are pre-adjudicated.

Step 1 DISA - {Pre-Adjudication}

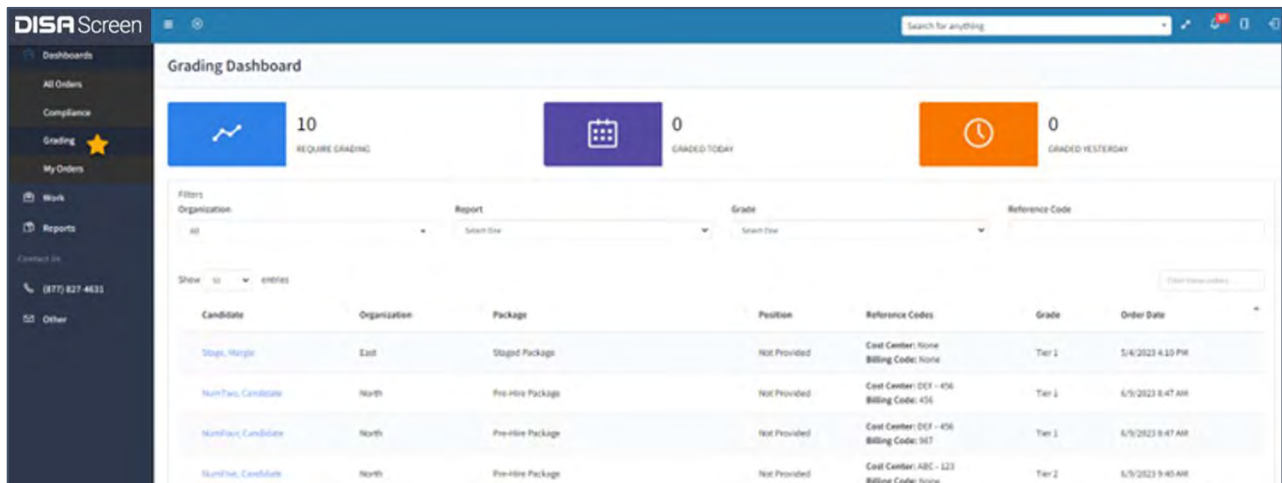
- Products set for grading will be pre-adjudicated by DISA/DISAScreen.
- DISA will only assign Tier 1 or Tier 2 to each search, based on Client approved grading policy.

Step 2 Client - {Final Adjudication}

- All Clear orders (Tier 1) will complete automatically.
- HR Review orders (Tier 2) are pending final adjudication will route to the 'Grading Dashboard'.

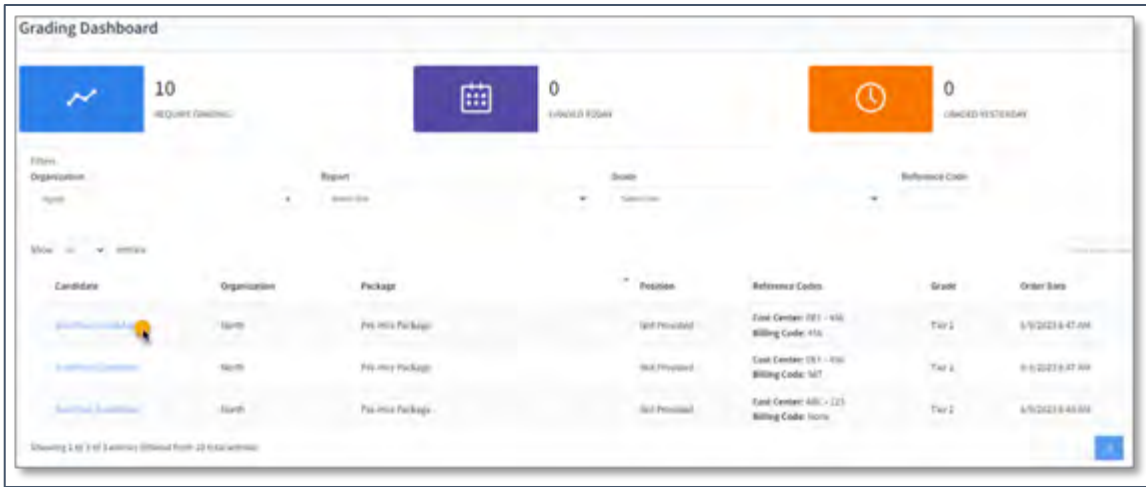
Grading Dashboard

Users with access to the 'Grading' dashboard will be able to review and adjudicate each order.

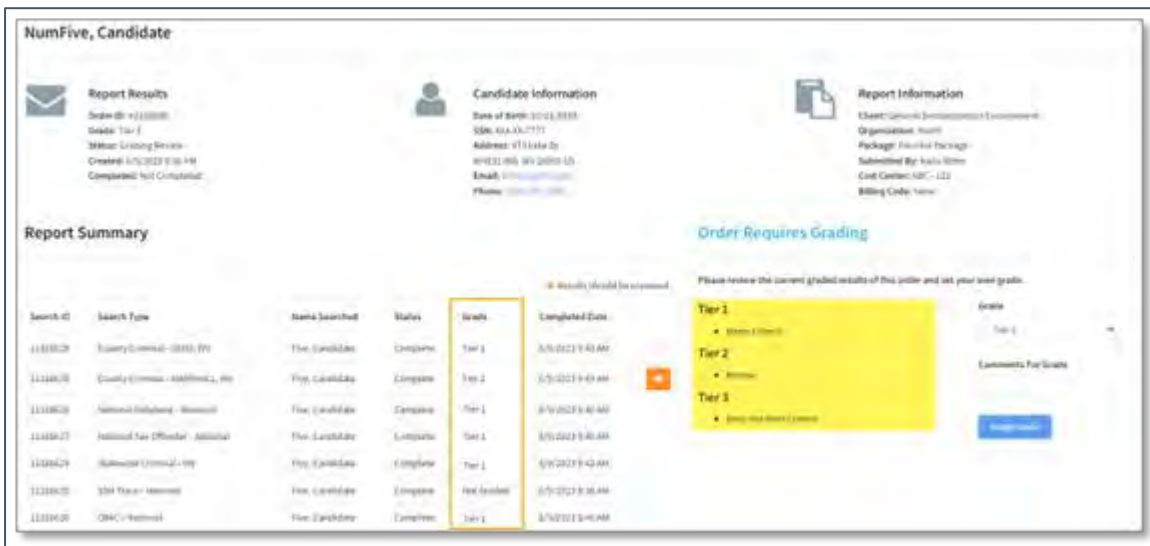


How to Adjudicate & Complete Order

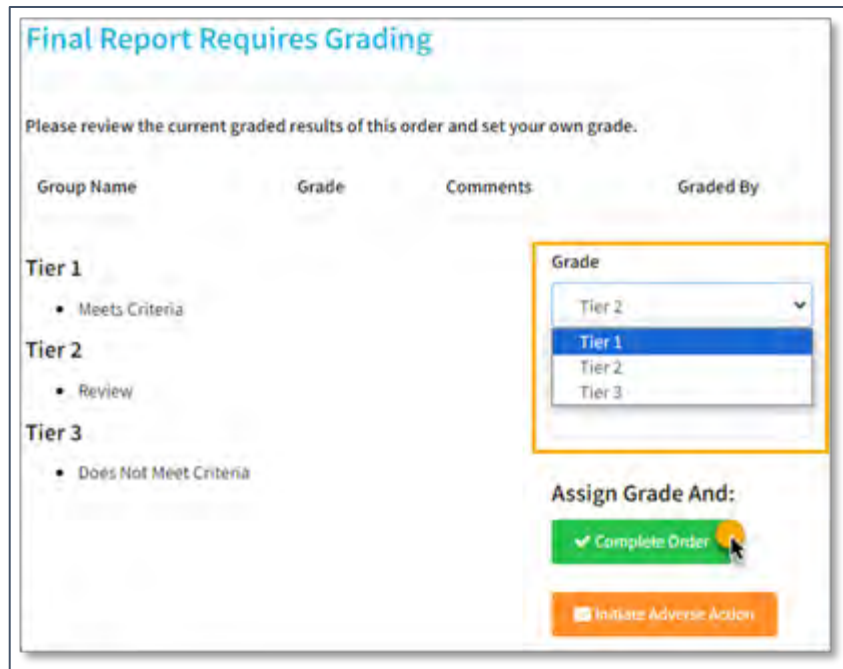
1. Locate order on Grading dashboard, see above.
2. Click on 'Final Report' – to access results and assign grade.



3. Final Report Summary is provided and DISA set pre-adjudicated grade will be displayed.
 - a. User will review final report details and determine what the final report grade will be assigned - by reviewing Client's provided Grading policy – in yellow.
 - i. Discrepancies are identified with the Orange square w/ eye.
 - ii. Result details are listed below the report summary for ease.
 - b. Tips: Grading policy contains rules for each product being adjudicated.
 - c. DISAScreen will display the lowest Tier (example below 'Tier 2') assigned for user to determine final grade.



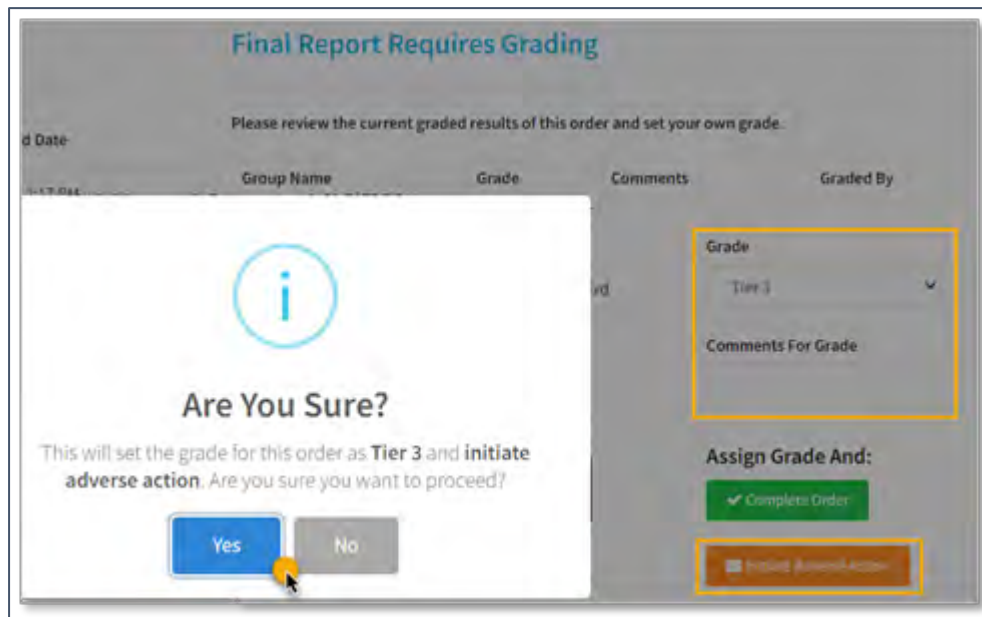
4. User will assign grade, by clicking the down arrow. A comment, for grade reason, can be added but not required.
 - a. Click 'Complete Order' once final grade is set.



Adjudicate & Sending Pre-Adverse

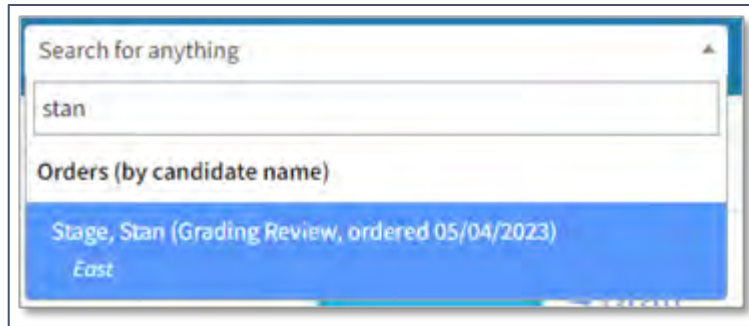
If the order being adjudicated will be sent for pre-adverse, this action can be completed during adjudication.

- User will follow above steps to locate the order and review the grading policy.
- If pre-adverse is to be initiated, while adjudicating, user will assign final grade and click 'Initiate Adverse Action'.
- Below pop-up screen will appear for confirmation

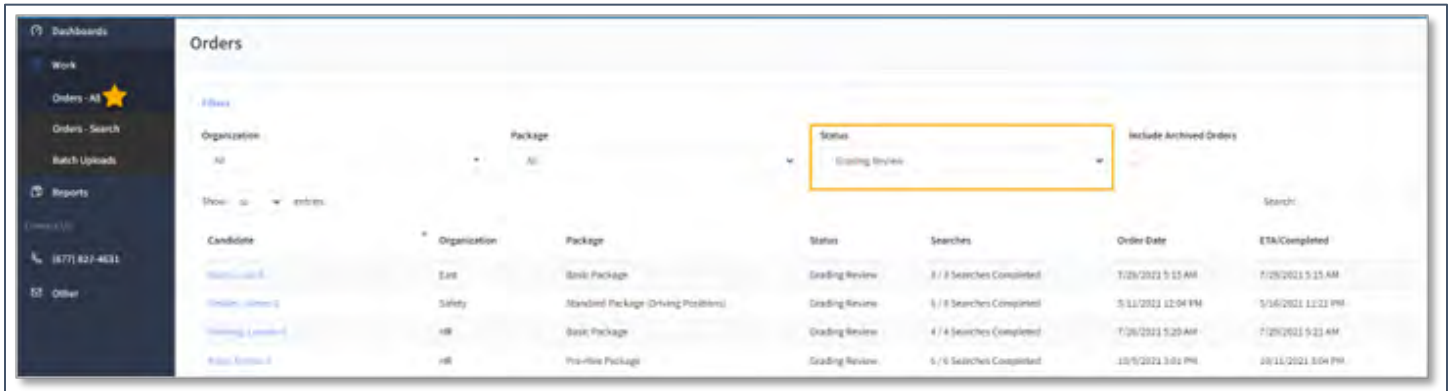


How to Identify Orders Pending Final Adjudication

When searching for orders pending final adjudication you will see the status as 'Grading Review'.

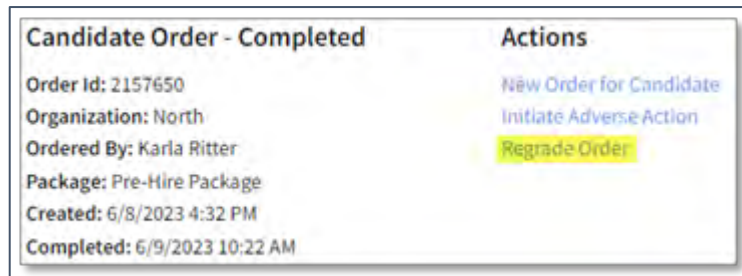


Utilizing the 'work' queue, user can view orders with a status of 'Grading Review'.



How to re-grade an order

- Locate order needing to be regraded.
- Under actions click 'regrade order'
- Order will be sent back to the grading dashboard and ready for final grade to be set.



Adverse Action

What if I have decided not to hire a candidate?

Under FCRA regulations, if an adverse hiring decision is made based in part or in whole due to information provided to you by DISA you must provide the candidate with the opportunity to respond by initiating an Adverse Action Letter.

Adverse Action functionality will only appear to users with proper permissions in DISAScreen.

Where to initiate Adverse

To initiate an Adverse Action; User must have proper access rights. Adverse Action will only appear when the order is fully complete and by clicking into the final background report.



Adverse Flows

Clients are responsible for initiating both pre-adverse and final adverse action letters via DISAScreen’s Compliance Dashboard.

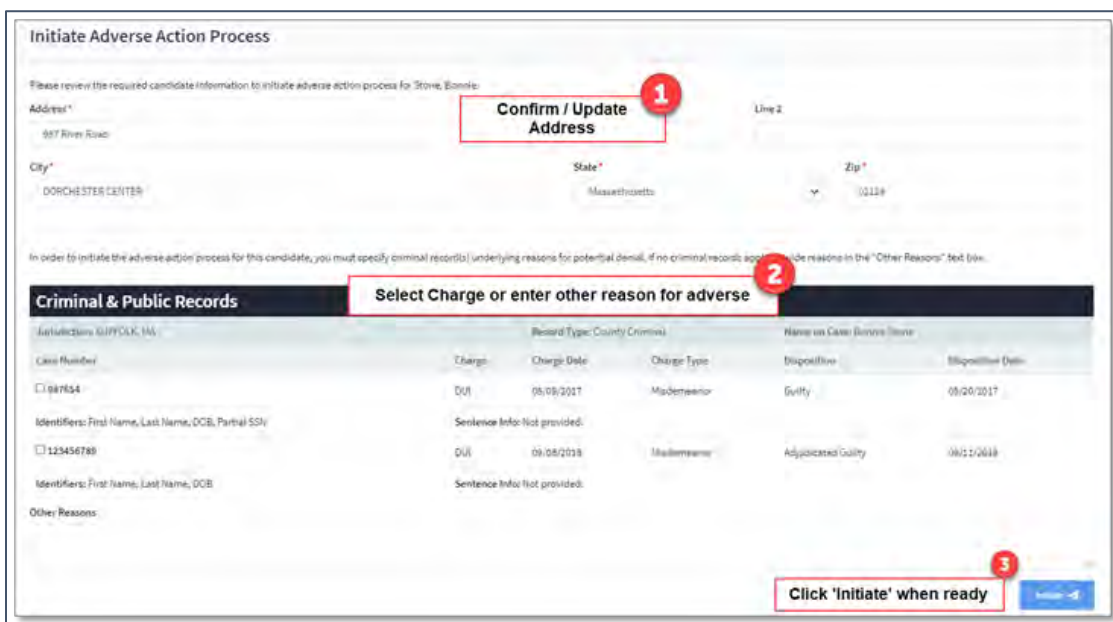
Adverse Flow

Once the adverse is selected candidate address and email will appear for confirmation/editing if needed. Click ‘Initiate’ when ready.



#2 Confirming Charges Flow

For jurisdictions that do require the reason that adverse is being initiated; the user initiating adverse will be prompted to select the reason, prior to being able to ‘initiate’ adverse.



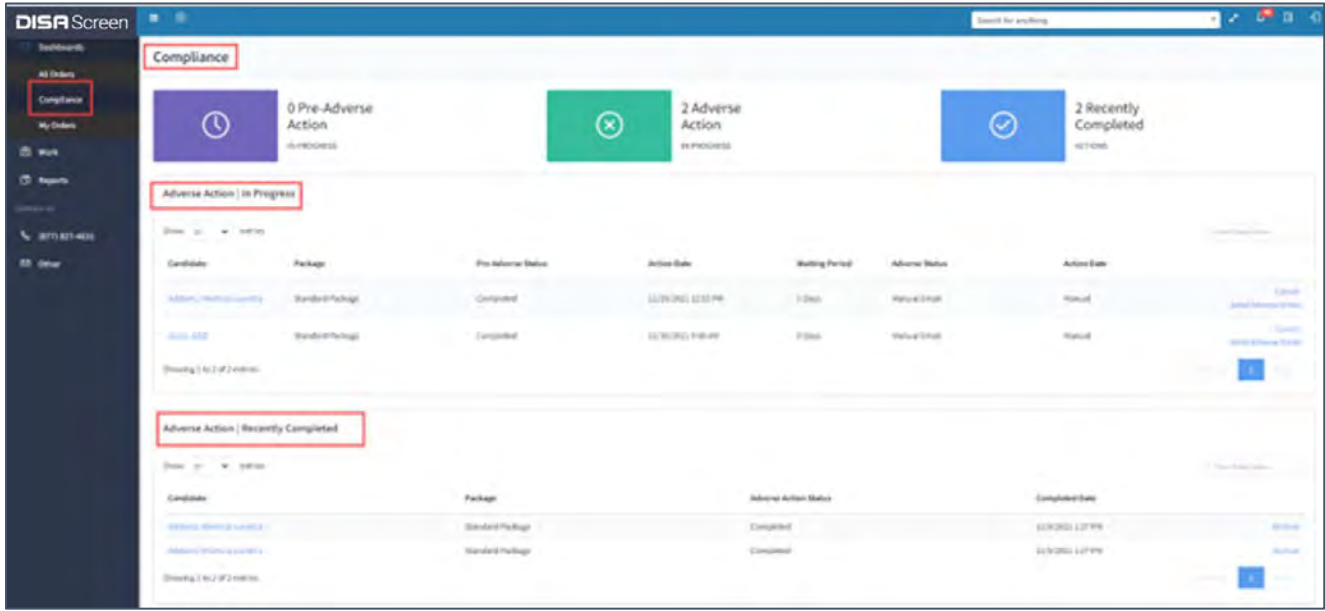
Identifying Orders in Adverse

Users will be able to know if the order is in adverse once they click into the candidate profile. Also, users with access to the 'compliance' dashboard will have the ability to view, manage and cancel adverse.

Compliance Dashboard

The Compliance Dashboard will house all orders with in-process or recently completed adverse action. Users are required to monitor this dashboard and initiate the final adverse letter via DISAScreen when ready.

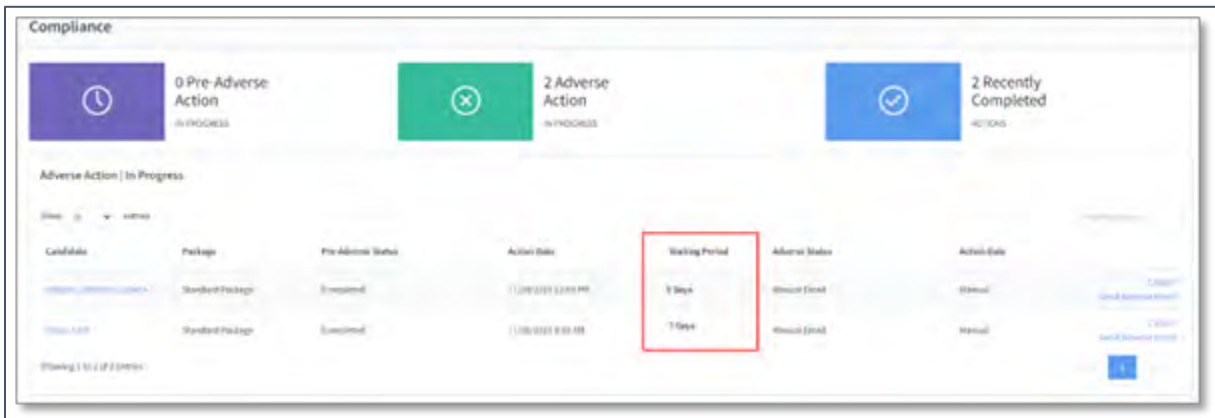
Only users with access to the compliance dashboard will have the ability to view and manage adverse orders.



Sending Final Adverse

The client user will initiate the final adverse letter to the candidate when ready, based on FCRA, jurisdictional timing, or company guidelines.

DISAScreen will display the number of days that have passed since the pre-adverse action letter was sent. The waiting period column on the dashboard contains this information.

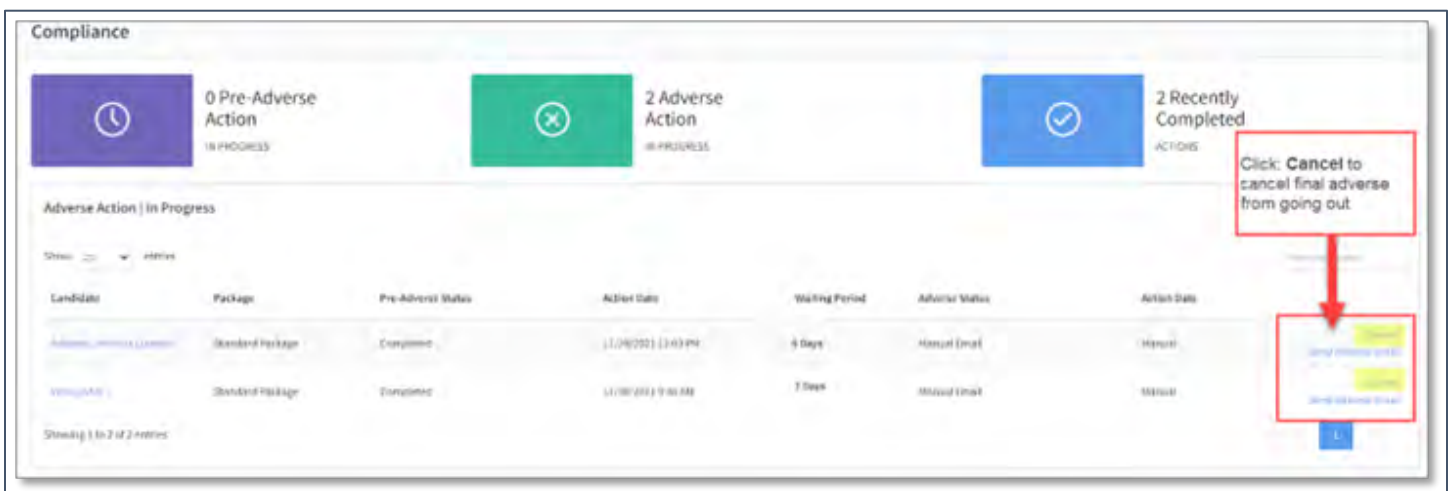


Sending Final Adverse: When ready to send the Final Adverse letter, the user will click 'Send Adverse Email'



Cancel Adverse

Should the user obtain additional details from the candidate and determine that they would like to cancel adverse, the user will click on 'Cancel' to the right of the candidate's name to stop the final adverse from sending.



Once the user clicks 'Cancel' the below item will appear, requiring the user to provide a reason to cancel & ability to cancel.

