



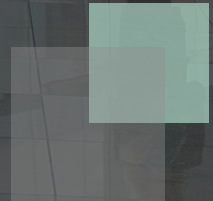
# The Client Hub User Guide

Sterling | July 2021



## Confidential & Proprietary Statement

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# Accelerate time-to-hire by managing daily screening tasks with ease

## Introducing the new Client Hub – powered by Sterling, designed to make your life easier and accelerate hiring decisions.

At Sterling, we've made it our mission to provide the foundation of trust and safety our clients need to create great environments for their most essential resource, people.

A changing world requires new ways of screening, and Sterling is constantly innovating to deliver on our commitment to provide our clients with advanced, technology-enabled services. To better serve the unique needs of HR professionals and because hiring velocity remains a top priority, Sterling is excited to introduce you to our modern, intuitive experiences.

Sterling has taken the complexity out of hiring by elevating our client experience, making your daily screening tasks easier and faster than ever.

### Here's how Sterling is redefining the client experience:

- A modern, mobile-responsive design that's accessible anytime, anywhere
- A permission-based hub allows you to view orders that are relevant to you
- An intuitive order dashboard that's easy to navigate
- Easily assign, unassign or reassign orders and invites in the order dashboard
- Conveniently review alerts and updates without ever having to leave your dashboard
- An easy-to-read and actionable order manager with color-based results and collapsible / expandable search details

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## Accessing the new Client Hub

### Access and toggle between new and existing experiences

Once you log in using your login credentials, you will automatically be directed to the new Client Hub.

Please note that you can easily toggle back to the existing SterlingONE experience via the left-hand navigation (dark gray).

If you are in SterlingONE and would like to return to the Client Hub, simply click the **Access Now** button via the top banner.

ID	Candidate	Status	Created	Assignee	Account	Package
5321633	John Doe	● Invite Incomplete	3/16/2019	Cory Schneider	Sterling Bellevue	Basic
5321633	Alexander Santos	● Invite Incomplete	3/16/2019	Alex Ernest	Sterling Bellevue	Basic
5321633	Maryanne Sebastian	● Not Submitted	3/16/2019	Unassigned	Sterling Bellevue	Basic
5321633	Mia Isadore	● In Progress	3/16/2019	Cory Schneider	Sterling Bellevue	Basic
5321633	Joseph Foster	● Additional Information	3/16/2019	Cory Schneider	Sterling Bellevue	Basic
5321633	Alex Suggett	● Additional Information	3/16/2019	Unassigned	Sterling Bellevue	Basic
5321633	Tristan Jones	● Pre-Adverse Action Sent	3/16/2019	Eva O'Hare	Sterling Bellevue	Basic
5321633	Marissa Lambert	● Dispute	3/16/2019	Unassigned	Sterling Bellevue	Basic
5321633	Simon Finch	● Pre-Adverse Action Sent	3/16/2019	Eva O'Hare	Sterling Bellevue	Basic
5321633	Marissa Lambert	● Recusescement	3/16/2019	Unassigned	Sterling Bellevue	Basic

Exhibit A: New Client Hub dashboard

## Client Hub

If you want to start an order right away, please read the next section. If you'd like to learn more about Client Hub dashboard features and functionality, feel free to jump to page 10.

**Start Order (Formerly Ticketing Functionality).** The **Start Order** option found on the left navigation will allow you to **submit an invite** by opening the New Order Settings page. Each drop down, or text box, in the workflow is dependent on the selection above. If you do not have access to any part of the workflow, that field will not display, and the drop down will be hidden.

- **Account.** This will direct your invoices and preferences
- **Workflow.** This dictates the candidate experience
- **Position:** The new system uses positions differently than SterlingONE. The new experience allows you to default packages, is reportable and searchable
- **Screening Package.** Your existing SterlingONE screening packages are available in this drop down
- **Bill Code.** This is equivalent to your SterlingONE reference codes that have been preloaded for your convenience, if applicable.

- **Add-Ons.** Allows for a la carte ordering
- **Location of Employment.** New feature to help drive compliance
- **Projected Salary.** New feature to help drive compliance

Exhibit B: New Order Settings

When a Screening Package is selected the **Package Details** will display on the right-hand side of the page. This space will also build with Add-on details as they are selected. If the screening package or add-on requires additional information to proceed, a box will display with the relevant questions in the form of a drop down or text box. At any time during data entry the **reset** button can be select to return the page to its original state.

After all, non-optional, fields are filled out the **Next** button will enable.

Exhibit C: New Order Settings w/ Package Detail

**Single Invite (Formerly Ticketing).** Now you'll be able add the candidates **First Name**, **Last Name**, and **Email** address as shown in Exhibit D. When all three fields are completed, the **Send Invite** button will be enabled. If you need to review or make edits, you can return to the previous page by selecting the Edit button.

**Sterling** Entire Organization Cory Schneider

Quick Search

Dashboard

+ Start Order

Recently Viewed

View Classic

### Order Summary

Company Account  
Sterling Bellevue

Consent Workflow  
Consent Basic

Screening Package  
Blue Profile - Basic Criminal

Position  
Engineer

Package Details

County Criminal - Off Employment (All Known addresses of Employment History)

Employment

- Aviation Employment Verification
  - Type of Employment: All
- Max One Jurisdiction Employment Verification
- Consider Employment Without Dates
- Round Back Dates to Beginning of the Year
- Search all Employment Years

Max 1 Jurisdiction I9 Data Migration Fee

Add On Details

10 Panel Urine Drug Test w/ Alcohol

- Online, Notify
- Pre-Employment

Bill Code (optional)  
ACC1

Location of Employment  
Seattle, Washington

Projected Salary  
Over \$75,000

### Add Attachments

Cancel

Add attachments to customize your workflow

Drag here or [click to browse for a file](#)

### Email Content

Add and modify your custom template below

Template  
Default

Subject  
Default Subject

Email Content

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus vel ipsum et ipsum eleifend euismod eu a est. Praesent imperdiet turpis non metus dictum porta nec vitae nunc. Morbi viverra tempor interdum. Duis ut mi quis massa mattis posuere. Donec congue elit id augue mattis, cursus malesuada ipsum condimentum.

Cc  
test.test@sterling.com

Bcc  
test.test@sterling.com

### Add Candidate

Important Disclosures

Manual Bulk Upload

Be sure to confirm your candidate's email before submission.

First Name Last Name Email

Send Invite

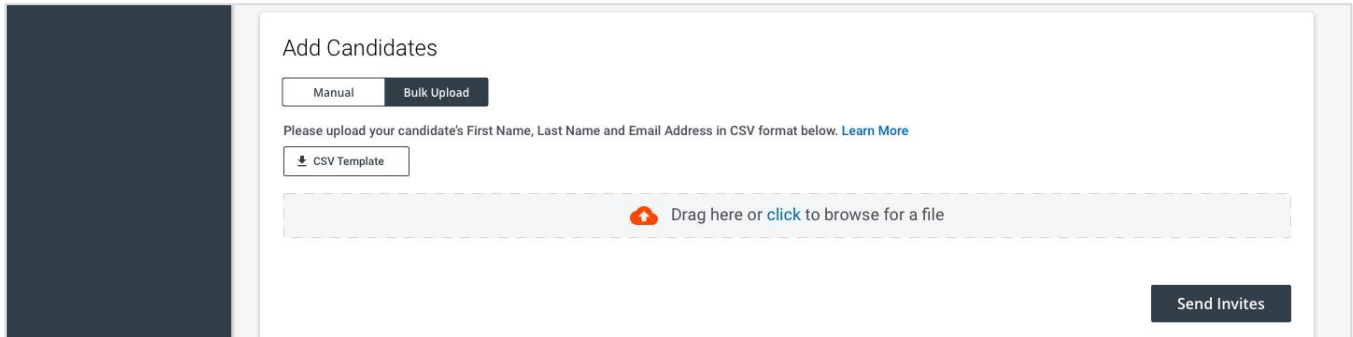
Exhibit D: Single / Manual Invite Submission

Three Submit Invite features recently become available that increases productivity (without having to toggle back and forth to classic view) by giving you the ability to:

- Easily attach documents
- Select pre-made custom email templates
- Add cc: and Bcc to invites

**Please note that you will not be able to add new custom email templates. However, any previous custom email templates in SterlingONE will automatically transition to the Client Hub, and is available in the drop down.**





Add Candidates

Manual

Bulk Upload

Please upload your candidate's First Name, Last Name and Email Address in CSV format below. [Learn More](#)

CSV Template

Drag here or [click](#) to browse for a file

Send Invites

Exhibit E: Order Summary Page with Bulk Upload Option

**Bulk Invite.** Previously in SterlingONE this was a setting that was not easily accessible. We have made improvements in the new experience! When submitting a bulk invite, the **Order Summary** page will provide you the opportunity to review order information. By selecting the Edit button, you can easily return to the previous page. After reviewing the order summary, you can select the **Bulk Upload** toggle which will provide access to download the orders customized template by selecting the **CSV template** button, located above the attachment section. Then, you must fill out all required fields including **First Name**, **Last Name**, and **Email** address for each candidate, up to 5000. If the order has a custom field, COC, or Kit number that is unique for each candidate, you will see the relevant column to the template. When a file has been uploaded, the **Send Invites** button will enable.

Directly after the **Send Invites** button has been selected, you will receive an email that the bulk upload is being processed. After processing, you will receive a second **Success** email listing the number of invites that have been sent to the candidate as well as any invites that were not sent and the reason for the failure.

The remainder of this user guide, we'll walk through key Client Hub features and functionality.

**Order Dashboard.** You no longer have to navigate across multiple tabs. The new Client Hub is now in one holistic dashboard with the ability to drill down to the statuses most important to you! The order dashboard shown in Exhibit G will reflect the number of items associated with the selection in the drop down including **Started**, **In Progress**, **Additional Information**, **Ready for Review** and **Adverse Action Process** tiles.

- **Invite Sent:** Invite has been created but the candidate has not yet opened the invitation
- **Invite Incomplete:** The candidate accepts the invitation but has not yet completed data entry
- **Not Submitted:** The data entry is complete, but the client has not yet submitted

The screenshot shows the Sterling Order Dashboard. At the top, there's a header with the Sterling logo, a user profile for Cory Schneider, and a dropdown for 'My Background Checks'. Below this is a summary row with six tiles: 'Started' (18), 'In Progress' (25), 'Additional Information' (16), 'Ready for Review' (11), 'Adverse Action' (6), and 'Completed' (78). A red box highlights these tiles. To the right of the tiles are buttons for 'Advanced Search' and 'Filter by Assignee'. Below the tiles is a table with columns: ID, Candidate, Status / Result, Created, Assignee, Account, and Package. The table contains four rows of data.

ID	Candidate	Status / Result	Created	Assignee	Account	Package
1293893	Maryanne Sebastian	Not Submitted	1/14/2019	Unassigned	Sterling Bellevue	Premium
5738494	Mia Isildore	In Progress	1/7/2019	Barney Jones	Sterling New York	Basic
1105585	Joseph Foster	Additional Information	1/7/2019	Unassigned	Sterling Bellevue	Premium
6536241	Alexandra Ernest	Additional Information	1/7/2019	Frank Aguila	Sterling Atlanta	Premium

Exhibit F: Order Dashboard feature on the Account Dashboard

- When an order is being fulfilled by Sterling, it will appear under the **In-Progress** tile.
- The **Additional Information** selection is a centralized place to find missing information and documentation that's required by the candidate or the client.
- If the order is complete and has an alert of any kind, it will stop in the **Ready for Review** tile. Within that selection, there can be four order status options – consider, Review, Level 2, and Level 3 - based off your account configuration. Depending on whether you have Client Matrix Application (CMA), your results will vary as indicated below:
  - Depending on whether you have Client Matrix Application (CMA), your results will vary as indicated below:
    - If you don't have CMA, results will be defined as **Clear** (formerly Passed) or **Consider** (formerly Alert)
      - **Clear:** Fulfillment is complete with no derogatory data findings on the order
      - **Consider:** One or more findings were listed on the order.
  - If a client has a two-level matrix, results will be defined as **Pass** or **Review**, depending on the client's settings
    - **Pass:** Fulfillment is complete with no derogatory data findings on the order
    - **Review CMA** fulfillment is complete with one or more findings included on the order, awaiting client assessment



- If a client has a 3-level matrix, results will be listed as **Level 1**, **Level 2**, or **Level 3**, depending on the client's settings
  - **Level 1:** Meets criteria
  - **Level 2:** Does not meet criteria, and needs client review
  - **Level 3:** Does not meet criteria, and needs client review
- The **Adverse Action Process** tile holds all orders that have had pre-adverse action initiated. You will be able to drill down the Adverse Action status to Pre-Adverse Action Sent, Adverse Action Paused, and Adverse Action Sent.
  - **Pre-Adverse Action Sent:** The Pre-Adverse Action Notice has been sent to the candidate
  - **Adverse Action Paused:** The Adverse Action process is paused and will not resume without client action
  - **Adverse Action Sent:** Final Adverse Action notice has been sent to the candidate
- When an order or invite has been canceled, archived, or completed with an order result of Clear, Pass, Level 1, it will conclude in the **Completed** tile. Within this selection, there are various statuses. These include expired invites, canceled invites, archived invites, archived orders, Clear, Pass, Level 1. This tile will hold the last 13 months of data.
  - **Clear:** Fulfillment is complete with no alert found on the order. This can include a unperformable search
  - **Pass:** Fulfillment is complete with no alert found on the order. This can include a unperformable search
  - **Level 1:** Fulfillment is complete with no alert found on the order. This can include a unperformable search
  - **Expired Invites:** Submitted invites that are over 30 days old with no completed data entry
  - **Cancelled Invites:** The client has chosen to cancel (previously known as "deleted") the request
  - **Archived Invites:** Represent a completed invite that has turned into an order
  - **Archived Orders:** This status represents manually archived items within the last 13 months

**Case Management.** The Case Management feature is a great feature in Sterling's new experience that allows you to conveniently assign, unassign and reassign orders within the Client Hub.

- The dashboard column **Assignee** clearly displays the name of the individual who is responsible for the order or invite ("unassigned" will show for all unassigned).
- Within the **Filter by Assignee** drop down, you can select yourself or another member of your team to view the users assigned orders. It also contains the option to filter by "unassigned". From here, you can assign items to yourself or other members of your team.

In addition, we released another enhanced case management feature that alerts you when new orders and/or invites are assigned to them. See Exhibit I.

Exhibit G: Case Management feature on the Account Dashboard

Exhibit H: Case Management Alert feature

The orders grid **checkbox** functionality allows you to select multiple orders or invites and assign them to a specific individual to be managed. This can be done from any page by selecting the order and using the “assignee to” drop down within the grid. See Exhibit H.

ID	Candidate	Status / Result	Created	Assignee	Account	Package
1293893	Maryanne Sebastian	Not Submitted	1/14/2019	Unassigned	Sterling Bellevue	Premium
5738494	Mia Isildore	In Progress	1/7/2019	Barney Jones	Sterling New York	Basic
1105585	Joseph Foster	Additional Information	1/7/2019	Unassigned	Sterling Bellevue	Premium
6536241	Alexandra Ernest	Additional Information	1/7/2019	Frank Agulla	Sterling Atlanta	Premium

Exhibit I: Order Grid Checkbox feature on the Account Dashboard

**Advanced Search.** This feature allows you to drill down to the data you find most relevant, including Client Status Account, Date Range, and multi-selections of Status, Results and Packages. See Exhibit I.

**Filters** 4 filters selected

**Search by Status**

Add Status Complete X

**Search by Result**

Add Result Consider X

**Narrow Search**

Account Sterling Bellevue Package Lorem Client Status Select Date Range Select

Apply

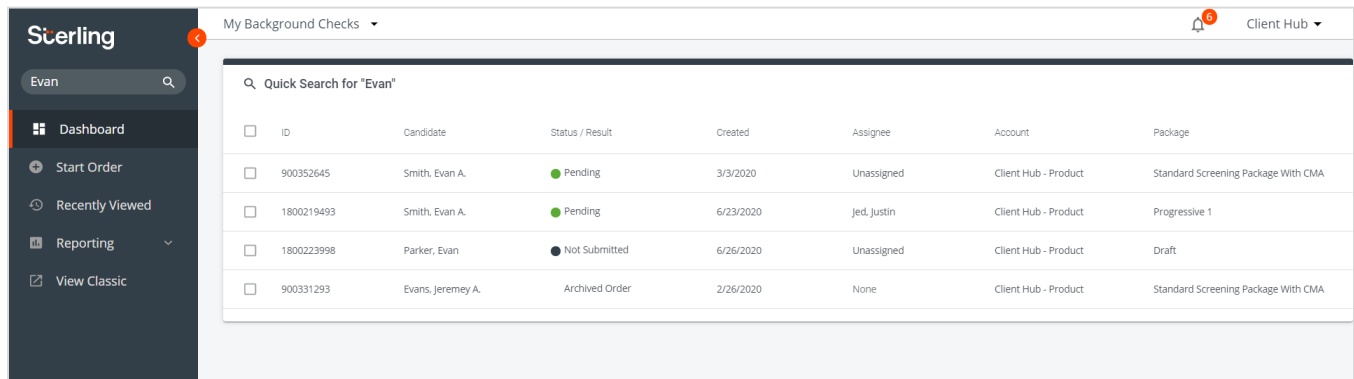
Select Search Criteria

Rows per page: 15 1-15 of 64

Exhibit J: Case Management Alert feature

**Quick Search.** When using the new Quick Search functionality on the top left of the navigation you are now able to search for a candidate by **first name**, **last name**, **email address**, **order ID** or **Invite ID**.

- Once on the Quick Search page you can view the candidates *Order Manager*, *assign*, *unassign*, or *archive* the order or invite from the orders grid.

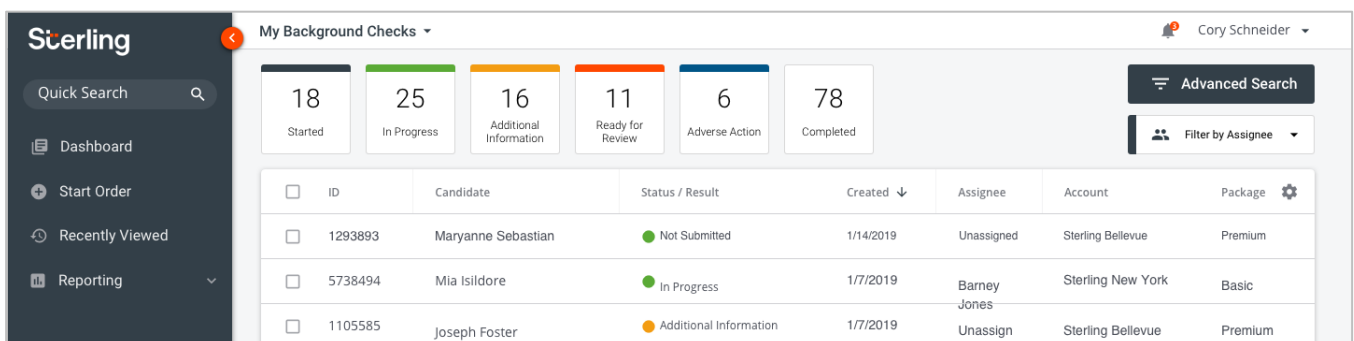


ID	Candidate	Status / Result	Created	Assignee	Account	Package
900352645	Smith, Evan A.	Pending	3/3/2020	Unassigned	Client Hub - Product	Standard Screening Package With CMA
1800219493	Smith, Evan A.	Pending	6/23/2020	Jed, Justin	Client Hub - Product	Progressive 1
1800223998	Parker, Evan	Not Submitted	6/26/2020	Unassigned	Client Hub - Product	Draft
900331293	Evans, Jeremy A.	Archived Order	2/26/2020	None	Client Hub - Product	Standard Screening Package With CMA

Exhibit K: Order Grid Checkbox feature on the Account Dashboard

**View Organization.** A permission-based portal allows you to see what orders are relevant to you. The **View Organization** feature dictates user access to the Client Hub. For example, super users will have access to all orders and invites under the that organization and will default to the **Entire Organization** in the drop down. If a user is set-up as a non-super user, their default view will only show orders that a user has as initiated themselves and will see **My Background Checks** in the drop down. When the drop down is selected, they will see all accounts they have access to listed in alphabetical order.

**User Drop Down.** The first and last name of the user will be displayed in the drop down in the upper right-hand corner. If the name is not available, the username will be shown. The **Account Dashboard** tab will route you back to the Account Dashboard where your return to the classic view. You will have to hit the Client Hub banner to get back into the Client Hub. When you select **Logout**, you will be logged out of all platforms connected to the new Account Dashboard.



ID	Candidate	Status / Result	Created	Assignee	Account	Package
1293893	Maryanne Sebastian	Not Submitted	1/14/2019	Unassigned	Sterling Bellevue	Premium
5738494	Mia Isildore	In Progress	1/7/2019	Barney Jones	Sterling New York	Basic
1105585	Joseph Foster	Additional Information	1/7/2019	Unassign	Sterling Bellevue	Premium

Exhibit L: User Drop Down feature on the Account Dashboard

**Alert Notifications Icon.** You are also able to conveniently review system alerts and important updates without ever having to leave your dashboard. The alert icon is fed from the .info site. If an alert is selected, a pop up will display with the details. If you select the **Clear All** icon located on the top right of the drop down, all notifications will be removed from the drop down.

**Alerts** [Clear All](#)

- ScreeningDirect Issue Update**  
On July 6, 2020, some customers reported issues loading ScreeningDirect. During our investigation, we believe the issue is due to a small number of internet ...  
22 hours ago
- ScreeningDirect connectivity issues**  
As of July 6, 2020, you may experience connectivity issues on our system. We are actively working to restore connectivity, and will provide updates as they b...  
1 day ago
- Resolved Service Advisory: Pennsylvania sex offender registry website is available**  
On Wednesday, June 17, 2020, the Pennsylvania Sex Offender Registry website became unavailable. Please be advised the issue was resolved on Thursday, June 18...

ID	Candidate	Status / Result	Created	Assignee
700315	Lane, Linda	Invite Sent	7/7/2020	Unassigned
1800247887	Progo, Tim A.	Pending	7/6/2020	Unassigned
694588	Smith, Jeff	Invite Sent	7/1/2020	Unassigned
693806	Jones, Jeff	Invite Sent	6/30/2020	Hub 1, Client
1800233683	Hansen, Dan A.	Pre-Adverse Action Sent	6/29/2020	Unassigned
1800233672	Hansen, Alex A.	Review	6/29/2020	Unassigned
1800233595	Test, Manju s.	Pending	6/29/2020	Test, James
1800224010	Krohn, Ryan E.	Pending	6/26/2020	Hub, Client
690389	Krohn, Ryan	Archived Invite	6/26/2020	None

Exhibit M: Alert Icon feature on the Account Dashboard

**Recently Viewed.** You are now able to see the last **15 invites/orders** you have recently viewed by selecting the **Recently Viewed** tab on the left side navigation. Once on the new page, you can view the candidates Order Manager assign, unassign, or archive from the orders grid.

**Recently Viewed**

ID	Candidate	Status / Result	Created	Assignee	Account	Package
700315	Lane, Linda	Invite Sent	7/7/2020	Unassigned	Client Hub - Product	Basic Criminal
900349136	Marshall, Michelle A.	Adverse Action Paused	3/2/2020	Hub 1, Client	Client Hub - Product	Standard Screening Package With CMA
1800233672	Hansen, Alex A.	Review	6/29/2020	Unassigned	Client Hub - Product	Standard Criminal Screening
1800218282	Harvey, Jim A.	Pre-Adverse Action Sent	6/22/2020	Jed, Justin	Client Hub - Product	COVID-Testing
4163062	Jones, Jennifer J.	Consider	10/15/2019	Hub 1, Client	Client Hub - Product	Basic Criminal
1800152728	Guy, UK k.	Not Submitted	5/19/2020	Hub 3, Client	Client Hub - Product	Draft
693806	Jones, Jeff	Invite Sent	6/30/2020	Hub 1, Client	Client Hub - Product	Basic Criminal
1800203818	Jones, Howard A.	Archived Order	6/15/2020	None	Client Hub - Product	Progressive 1
1800233683	Hansen, Dan A.	Pre-Adverse Action Sent	6/29/2020	Unassigned	Client Hub - Product	Standard Criminal Screening
900463085	Bednar, Roger L.	Archived Order	3/19/2020	Hub 3, Client	Client Hub - Product	Basic Criminal
1800219584	Fake, Jake A.	Archived Order	6/23/2020	None	Client Hub - Product	Progressive 1
690271	Lorris, Becky	Archived Invite	6/26/2020	None	Client Hub - Product	Basic Criminal
900514009	Hughes, Tammy A.	Adverse Action Sent	3/31/2020	Unassigned	Client Hub - Product	Progressive 1

Exhibit N: Recently Viewed invites and orders

## Translation of Terms

If helpful, below you'll find a quick translation of SterlingONE vs. Client Hub terms.

SterlingONE Terms	Client Hub Terms
<b>Dashboard:</b> A web-based user interface to submit orders with additional tabs to manage all hiring activities for candidates and new hires.	<b>Order Dashboard.</b> Our modern, mobile-responsive Client Hub is designed to help manage daily tasks with ease, via an intuitive order dashboard, and front-and-center real-time order status and results.
<b>Launch:</b> Launching an order requires that you, as the client, complete the required data entry for your candidate in order to run a report.	<b>Single Invite.</b> We highly recommend that you use the Start Order feature that allows you to easily and quickly submit an invite by adding a candidates First name, Last name, and Email address.
<b>Ticketing:</b> Tickets are sent to candidates to complete the required data entry electronically, versus you needing to complete it via the launch process.	<b>Start Order.</b> The Start Order option found on the left navigation will allow you to submit an invite that will direct candidates to Sterling's highly rated, engaging Candidate Hub.
<b>Candidate Profile:</b> Consolidated view that houses all screenings, ticket history, and documents for a single candidate.	<b>Order Manager.</b> With Order Manager, you can review, action, and manage candidate results from a centralized tool throughout the screening journey. There's also a convenient right hand-nav, and an Attachments tab that allows you to easily attach documents to orders and/or specific searches.
<b>Report ID:</b> This is a unique number associated to each candidate report. A candidate could have multiple reports within their candidate profile.	<b>Order ID.</b> Order ID is a unique number associated with each candidate report. When using the new Quick Search functionality on the top left of the navigation you can now search for a candidate by order ID.
<b>EDA:</b> Electronic Disclosure and Authorization, Sterling offers an electronic consent process as an alternative to a paper consent process signed by the candidate.	<b>Electronic Consent Forms.</b> The candidate is taken through a series of digital consent forms, including disclosure of authorization that's required to begin their background screening process.
<b>Candidate portal:</b> Online branded portal for candidates and new hires to interact with your organization.	<b>Candidate Hub.</b> Our highly rated Candidate Hub delivers a simple, engaging, and smooth data collection process for candidates – at any time, across any device.
<b>SterlingONE Admin:</b> Robust customization tools empower you to manage the branding, messaging, and media assets of the candidate portal, as well as set up user permissions, email template groups, and more.	<b>Client Hub Admin.</b> As an admin, you'll find a permission-based hub that allows you to easily view orders that are relevant to you. You can also conveniently review alerts and updates without ever having to leave your dashboard.
<b>Parent User:</b> The administrator on the account who is authorized to add users, view billing and Invoices, and approve changes to the account. There is only one true parent user, however additional users may be given parent level access.	<b>Super User.</b> Super users have access to all orders and invites under their organization and will default to the Entire Organization in the drop down. If a user is set-up as a non-super user, their default view will only show orders that a user has as initiated themselves and will see My Background Checks in the drop down.