JDP PLATFORM USER GUIDE

JDP

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In This Guide

This guide is designed for you to use as a reference tool for 'The JDP Platform'. It describes the process of ordering background checks, viewing results, and other administrative functions. Please see below for a full list of items covered in this guide:

JDP | RISK MITIGATION SPECIALISTS

Confidential & Proprietary

Introduction

Overview

'The JDP Platform' is a web-based pre-employment screening utility, offering fast, background information to meet your business needs. 'The JDP Platform' offers an automated and interactive ordering system, customized screening packages based on position, custom adjudication criteria, flexible reporting options, tiered background screening, timely results, online billing, and accommodating administration functions making 'The JDP Platform' a comprehensive solution for any employers hiring program.

In order to get the most visually pleasing experience, use a monitor resolution of 1024 x 768 or greater. For the best possible security and user experience, JDP recommends using the latest versions of:
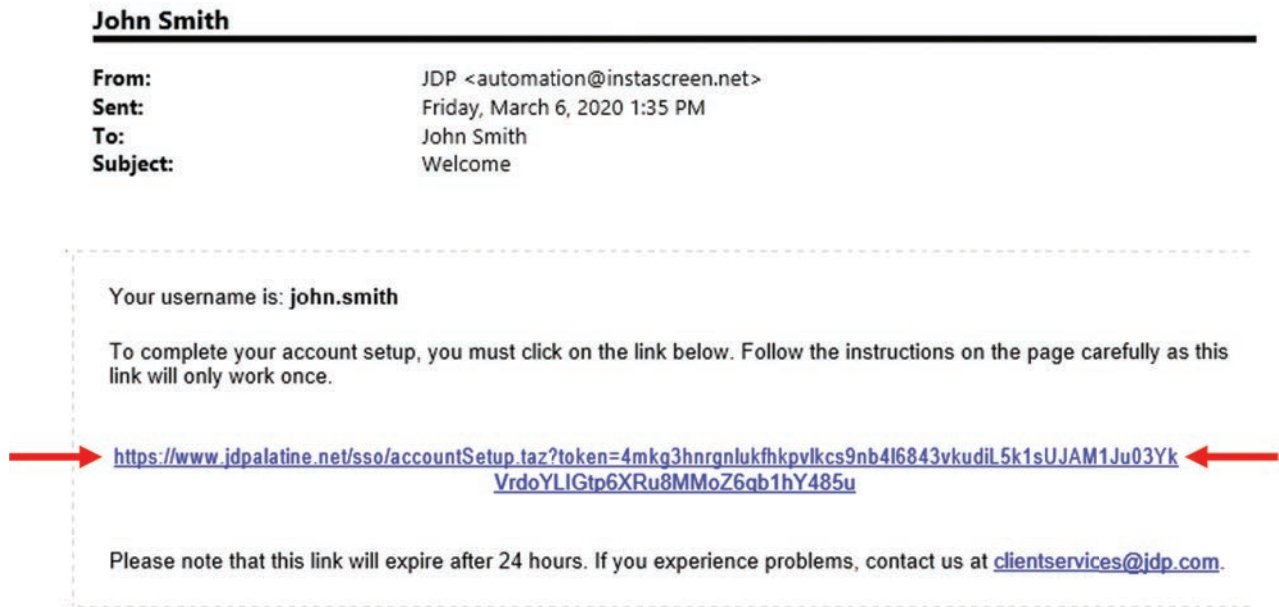
- Google Chrome
- Mozilla Firefox
- Apple Safari
- Microsoft Edge

Logging In For The First Time

You should have received an email from JDP <automation@instascreen.net> with some basic log-in instructions. Please note the link provided in this email expires after 24 hours and is only good for one-time use.

First, you will click the link contained in the email:

John Smith

From:	JDP <automation@instascreen.net>
Sent:	Friday, March 6, 2020 1:35 PM
To:	John Smith
Subject:	Welcome

Your username is: **john.smith**

To complete your account setup, you must click on the link below. Follow the instructions on the page carefully as this link will only work once.

https://www.jdpalatine.net/sso/accountSetup.taz?token=4mkg3hnrgnlukfhkpvlkcs9nb4I6843vkudiL5k1sUJAM1Ju03Yk VrdoYLIGtp6XRu8MMoZ6qb1hY485u

Please note that this link will expire after 24 hours. If you experience problems, contact us at clientservices@jdp.com.

After clicking the link, you will be taken to the first **"Account Setup"** screen seen below:

Account Setup

Please enter a password that meets the criteria listed below.

* Enter Username:

* Enter Password:

* Re-enter Password:

Passwords must fulfill the following criteria:
- Minimum 12 characters
- Contain at least one letter
- Contain at least one special character
- Contain at least one digit
- Passwords must match

Cancel   Next →

On this screen you will set your own password. Please follow the password criteria listed:
- Password must be at least twelve characters in length
- Password must contain at least one letter
- Password must contain at least one digit
- Password must contain at least one non-alphabetic symbol

After setting your password, you will arrive to the second **"Account Setup"** screen seen below:

Account Setup

As part of the "Forgot Password" feature of the system, you will be prompted to answer security questions. These questions come from the pool of questions that you choose here, and become part of your profile.

Question 1:	-- Please Select -- ▼
Answer to Question 1:	
Question 2:	-- Please Select -- ▼
Answer to Question 2:	
Question 3:	-- Please Select -- ▼
Answer to Question 3:	

Cancel   Complete

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This is required as a part of the "Forgot Password" feature. Please set the three security questions using the pool of questions provided. In addition, please answer each of the security questions that you set. Once you have set and answered all three questions, please click the 'Complete' button to move on to the third and final "Account Setup" screen as seen below:

Account Setup

To protect access to sensitive data, a code will be provided to you when logging in or attempting to reset your password. The code serves to help prove that you are the person making the request and should be sent to a device or application that is not generally available to other people.

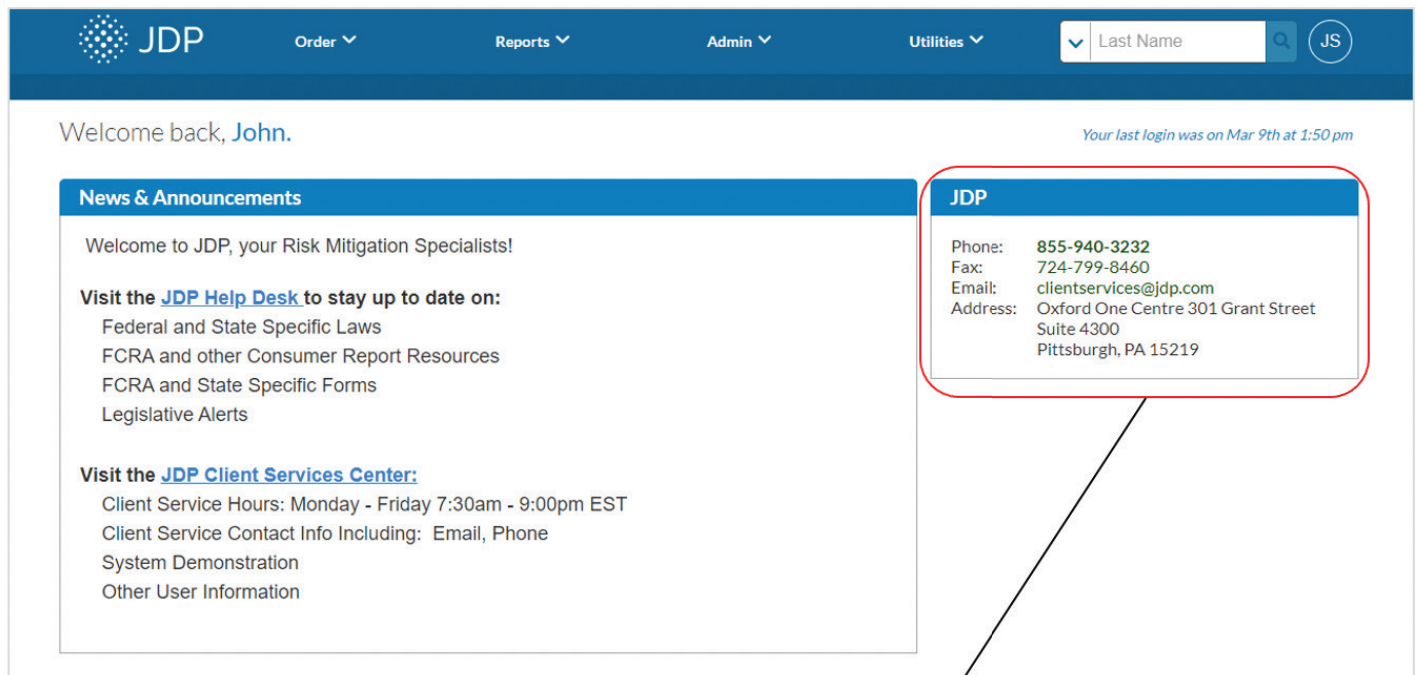|	
* MFA Method:	Text Message ▼
	Text Message
* Phone Number:	Authenticator App
	Email

Cancel   Next →

As another layer security 'The JDP Platform' requires that all users enable Multi-Factor Authentication. MFA gives the account an extra layer of security by asking you to enter a 6-digit code that is sent to you via email, text or authenticator app, verifying you are who you say you are. You will be asked to verify yourself through MFA every 30 days. Otherwise, you will not see these **"Account Setup"** screens when logging into your user account and will follow the normal login process on the following page.

The JDP Home Screen

After completing account set-up, you will land on the home screen. This is the page you will land on after logging in as well. At any point, you can click the JDP logo in the upper left-hand side of your screen to return to the home screen. The JDP logo will be present on any page you navigate to.
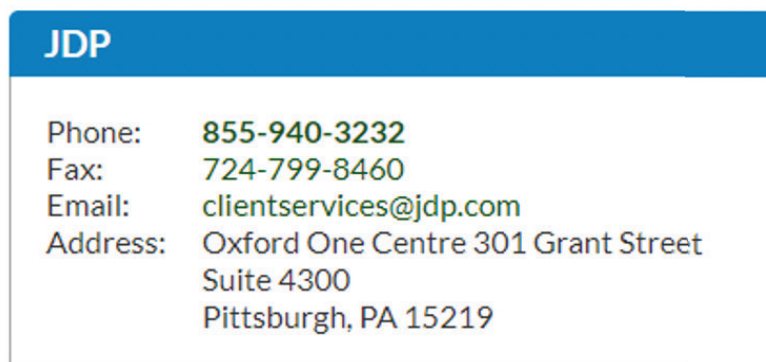
The home screen has two main sections outside of the toolbar at the top of the page, **"News & Announcements"** and **"JDP"**.

JDP Section

This section of the home screen includes our contact info:
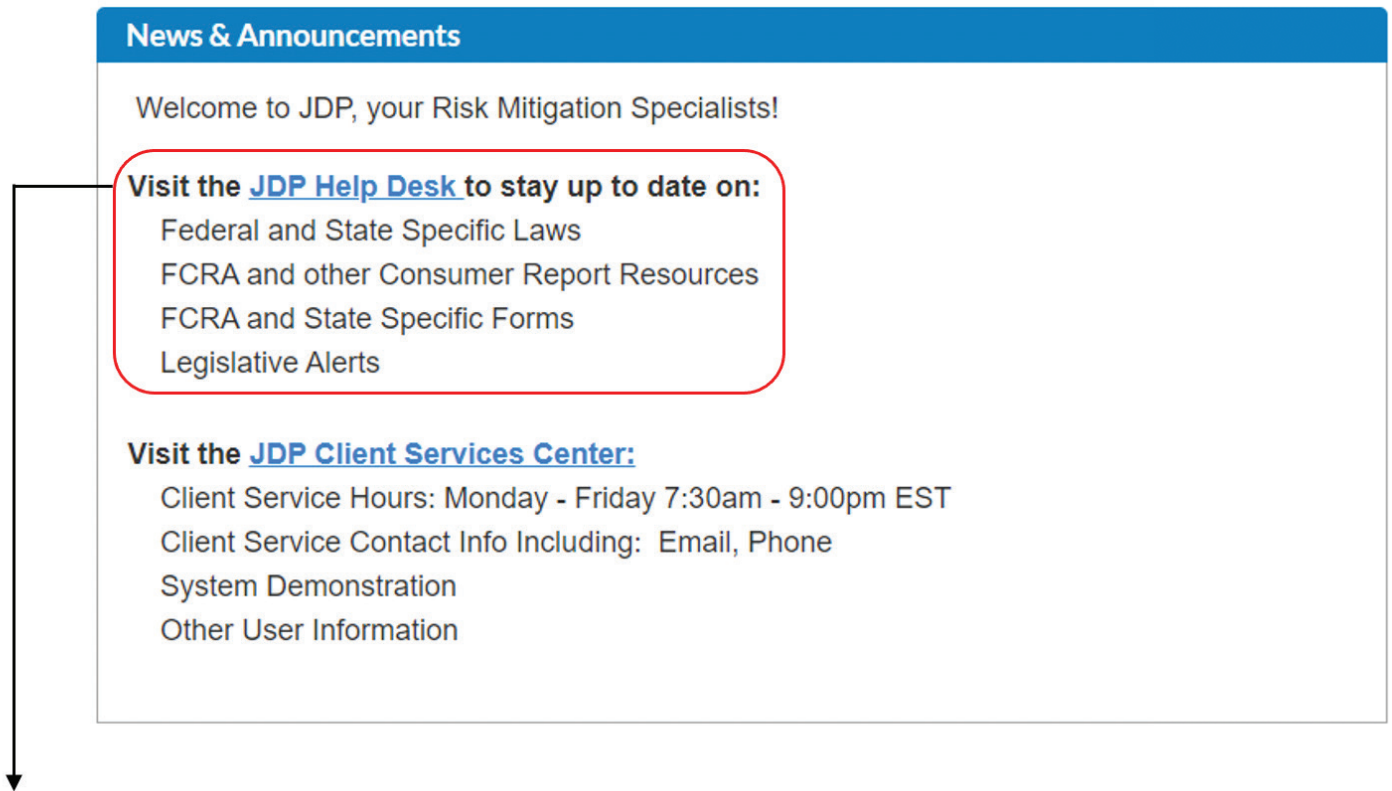
- The phone number listed, (855) 940-3232, will connect you with our Client Services team.
- The email address, clientservices@jdp.com, will also connect you with our Client Services team.

News & Announcements Section

This section of the JDP Home Screen includes the **"JDP Help Desk"** and the **"JDP Client Services Center"**. Each of these sections contain a clickable link. To access the information contained within the link, please click **"JDP Help Desk"** or **"JDP Client Services Center"**. Each sub-section is explained below:

News & Announcements

Welcome to JDP, your Risk Mitigation Specialists!

Visit the <u>JDP Help Desk</u> to stay up to date on:
- Federal and State Specific Laws
- FCRA and other Consumer Report Resources
- FCRA and State Specific Forms
- Legislative Alerts

Visit the <u>JDP Client Services Center:</u>
- Client Service Hours: Monday - Friday 7:30am - 9:00pm EST
- Client Service Contact Info Including: Email, Phone
- System Demonstration
- Other User Information

The **"JDP Help Desk"** contains information such as:

• **The State Rules Register - For Employers and Landlords:** a collection of information on the subject of useable public record information that is typically available from background screening companies.

• **Choose a Report to Display**
　　1. <u>Single-State Report</u> – Provides all restrictions within a given state.
　　2. <u>Multi-State Matrix</u> – Shows a list of restrictions for up to 10 states.
　　3. <u>Restriction Matrix</u> – showing involved states

• **About Ban-the-Box: 5 possible restrictions**
　　o Includes an 8-page document which reviews 5 major municipalities and lists 160+ counties and cities that impose some type of Ban-the-Box law within their respective jurisdictions.

• **Resource Tabs include:**
　　o General Information
　　o Series of Downloadable Publications Jointly Issued by the EEOC and FTC
　　o FCRA Forms
　　o State Specific Information and Certain State or Large City Forms

• **List of Alerts**
　　o Alerts are listed in chronological order with the most recent alert at the top.

*JDP Client Service Center – Info on following page…

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- Client Service Hours: Monday - Friday 7:30am - 9:00pm EST
- Client Service Contact Info Including: Email, Phone
- System Demonstration
- Other User Information

The **"JDP Client Services Center"** provides a link to the JDP 'Support' page. From the 'Support' page, you have access to the following materials:
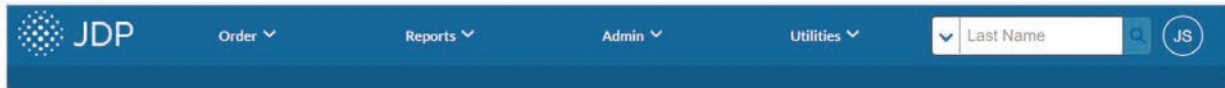
- **Support Request Form** – Allows you to submit a support ticket. Great for after hour support.

- **Contact Client Services:**
  - o (855) 940-3232
  - o clientservices@jdp.com

- **Downloads**
  - o User Guide

- **Videos**
  - o JDP Demo

The JDP Client Services team is available Monday through Friday, from 7:30am to 9pm Eastern Time (ET).

Tabs

Depending on your permissions, the tabs at the top of the JDP Home Screen will appear as follows:

Admin Permissions:

JDP | Order ∨ | Reports ∨ | Admin ∨ | Utilities ∨ | [∨ Last Name 🔍] (JS)

Standard Permissions:

JDP | Order ∨ | Reports ∨ | Utilities ∨ | [∨ Last Name 🔍] (TT)

A description of each tabs functionality is included below:

Order – This tab allows you to place a **"New Order"**, place a **"Batch Order"**, view **"Draft Orders"**, view orders in **"Applicant Pending"** status, view orders in **"Applicant Ready"** status, or view the **"XML Ready"** queue.

- **New Order** – Allows users to place a single order for an applicant.

- **Batch Order** – Grants users the ability to place multiple orders at once for a list of applicants. This can help users simplify the ordering process for a large list of applicants.

- **Draft Orders** – Allows users to stop and save while placing an order on an applicant so users can pick up where they left off later. This is helpful if users do not have all the necessary information or required authorization forms.

- **Applicant Pending** – Shows users which applicants have been invited to do a QuickApp but have not yet accepted the invitation. Once the applicant accepts the invitation by clicking on the link, it will take them to a welcome screen to begin the application process.

- **Applicant Ready** – Where users will find all the QuickApp orders that have been completed by applicants, but have not been set to process instantly. This queue allows users to review the applications before submitting an order, fix any data issues and control the selected searches.

- **XML Ready** – This queue is similar to the Applicant Ready queue, but collects reports that are ordered via an integration with a commercial system. If organization places an order from a commercial system and not set to process instantly within JDP, or missing required information, it will go to the XML Ready queue.
  *Applicant Ready and XML Ready to be merged together to create the "Ready Queue". Coming soon!

Reports – From this tab, you can view **"Pending Reports"** and **"Completed Reports"**. You can also view the **"Disclosures Queue"** and **"Monitoring Queue"**. This tab allows you to view your **"Last Reports"** (last 200 reports), or do an "**Advanced Search"**.

- **Pending Reports** – List of open reports that have at least one item pending.

- **Completed Reports** – Displays reports with a completed status.

- **Disclosures Queue** – Gives users a single location to manage disclosures for all reports and clients, bringing them to the forefront to ensure they are being handled timely and appropriately.

- **Monitoring Queue** – Provides users the ability to track changes or new records on an applicant for a given period of time after the initial background check is completed. This allows users to be notified if any new hits on that specific applicant are found on a specific search for the year following the initial background check. (Only available with admin permissions)

- **Last Reports** – Displays the most recent ordered reports in chronological order (last 200 reports).

- **Advanced Search** – Provides additional search fields to locate reports.

Admin* - Within this tab, **"Manage Client"** gives you the ability to add, edit, or delete user account information. You can also add or edit the 'Credit Card Information' for your organizaiton. Finally, this tab allows you to **"View Invoices"** for your organization. (Admin tab only available with admin permissions)

Utilities – From this tab, you can access various **"Tools"** or utilize the **"Report Designer"** to run a number of different reports. Included below are the various reports that can be run under the **"Report Designer"** and a breif description of each report:

- **Hit Ratio** – Review the occurrence of hits (records found) or response received on searches. Not all searches use the same list of possible response/result options, this report helps to identify the key ones: hits (for investigative searches) or successful contact (for verifications). The Hit Ratio report comes in two formats:

    o Search Centric: Allows you to see your hit (records found) or response received ratio for a search type in a given time period

    o Report Centric: Shows the response (hit or contact made) by applicant. This better answers the question of how often you find hits or make contact for an applicant (instead of generally over all searches). This is likewise grouped by search type so you can see how often applicants have a hit or successfully verification for a chosen search type.

- **Metadata Report** – Provides details for files created or completed within a selected date range.

- **Product Utilization** – See how often searches and products are being ordered.

- **Status Reporting** – Checks on the progress of orders and searches. Though similar to the work pace pages, this report trades the day-to-day work functionality in favor of reporting features like groupings, calculations, and charts. There are two different status reports:

    o Complete Reports: Provides hit and flag information on reports that have been completed within a selected date range.

    o Incomplete Reports: Provides the current status and age of all open reports.

- **Time Service** – Analyze the time it takes to service a request and the individual factors that contribute to the time between the request and delivery of the results. The time service report can be run in three distinct ways:

    o Completed by Report: View the key dates and service times for each completed order.

    o Completed by Search Type: View key dates and service times for each completed search.

    o In Progress by Search Status: Quickly see which search types are aging most and which status they appear to get stuck in.

   *For assistance running these reports or utilizing additional services, please contact Client Services.

Search Bar – The down arrow on the left hand side of the search bar allows you to set different search criteria. It allows you to search by Client Name, Client Code, File Number, Reference, Last Name, Email, SSN, or SSN (Last 4).
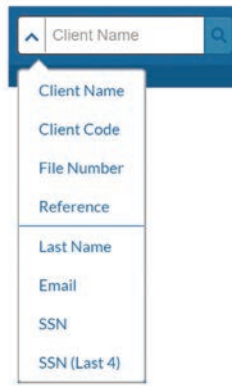
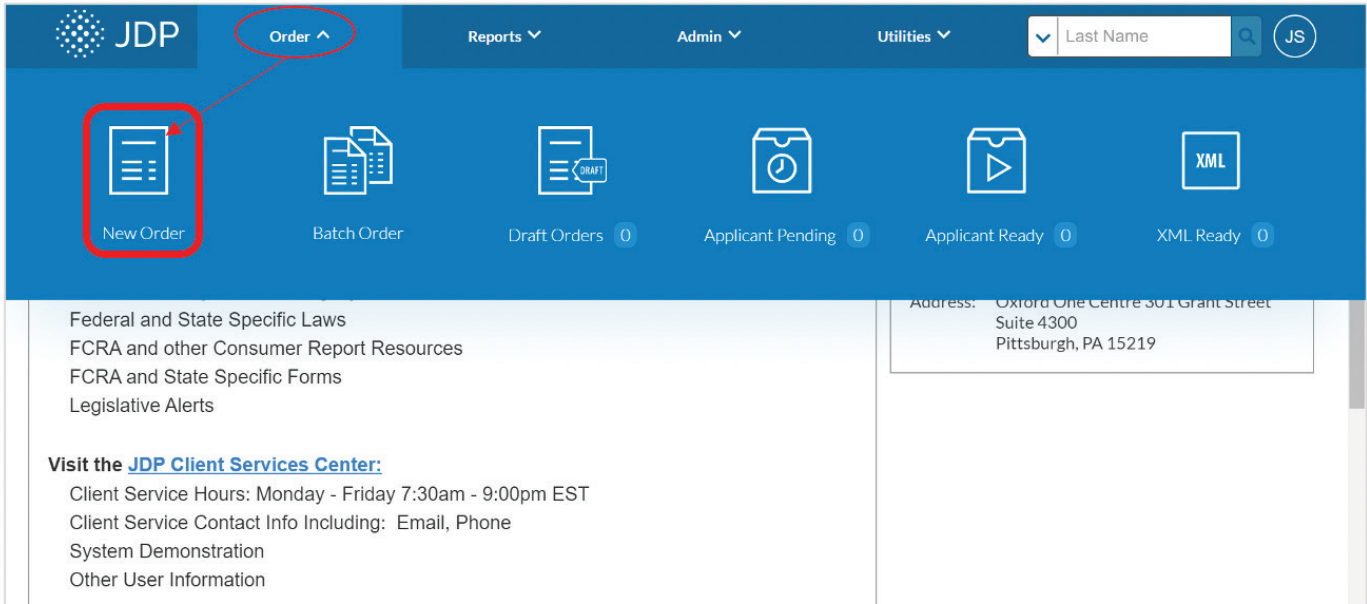**My Profile** – Click Initials to configure your profile.

- **Help** – Provides JDP contact information such as phone number, fax, email, and address.

- **My Profile** – My profile is where users can manage their contact information, workspace preferences, security and password preferences, and more. To manage my profile and preferences, go to the icon in the top right corner with your initials and select My Profile from the drop-down. (To manage contact information, preferences, passwords and more)

  - **Personal Tab** – To update name, title, etc. Editable options here are:
    - First and last name
    - Job title
    - Email
    - Phone and fax numbers

  - **Preferences Tab** – To configure default views, page lengths and order display through the system. Edit your "Workspace" defaults according to how you like to work:

    - **Simple Search Default:** When searching for something using the search bar at the top of the site, users can use the drop-down to choose what field you are searching by. This preference lets you choose what to set as default. Search by:
      - Client name
      - Client file number
      - Client code
      - Reference
      - Last name
      - Social security number
      - Last 4 digits of SSN

    - **Page Length:** This setting is how many files appear per page. By default, the system will show you 15 reports. You can set this to 15, 30, 50, 100, or 200 files.

    - **Check box to exclude archived files:** When a simple search is done it will show users, by default, archived files this can not show by choice.

    - **Default Report Results Details:** Set details and applicant information to be colla sed (closed) or expanded (open) by default when you view the report results page.

    - **Default Report Results Notes:** Set the notes on the Report Results page to be collapsed or expanded by default. It can be set to open, required open, or closed The example below shows "Closed":

- **Pending Reports Sort Order:** This determines whether the pending reports queue is sorted as new to old or old to new.

- **Completed Reports Sort Order:** Set whether the completed reports are sorted old to new or new to old.

o **Password Tab** – Provides users the ability to change their password, but it must fulfill certain criteria. These are tips and guides as to the best practice for password security, detailing how to protect passwords, what characters they should contain, and ways to protect users as they are entering their passwords into the system. Timed resets for failed login attempts:

- After multiple failed login attempts, you'll be prompted to try again after 30 min.

- If you do get locked out of your account and are waiting the 30 minutes, you can still access the "Reset Password" option. If you just forgot your password, you can change your password and regain access to your account immediately.

- After the 30 minutes is over, you will be able to attempt again, but you will still be indefinitely locked out if they continue to have failed login attempts, as outlined below:

  - 4 failed login attempts = 30 minute delay
  - Another 4 failed login attempts = another 30 minute delay
  - Another 4 failed login attempts = locked out of account until further notice
    *Users with "Admin Permissions" have ability to unlock accounts
    **Contact Client Services if you need assistance

o **MFA Tab** – Configuring MFA method and accepting texting, if desired. MFA is Multi-Factor Authentication for an extra layer of security into the system.

o **Security Questions Tab** – Configuring security questions in case you forget your password. This is an alternate way of verifying your identity.

- **System Info** – Shows system info such as what browser you are using to navigate 'The JDP Platform', the current URL, the previous URL, and the user logged in to 'The JDP Platform'.

- **Logout** – Logs you out of your current session within 'The JDP Platform'.

Placing a New Order

To place a new order, hover over the **'Order'** tab with your cursor and click **'New Order'**.

From there, you will come to the **"Select Product For Order"** screen. This screen will display all of your organizations package options. The package name is listed in bold blue text. The various searches contained within that package are displayed below the package name in a standard black text:
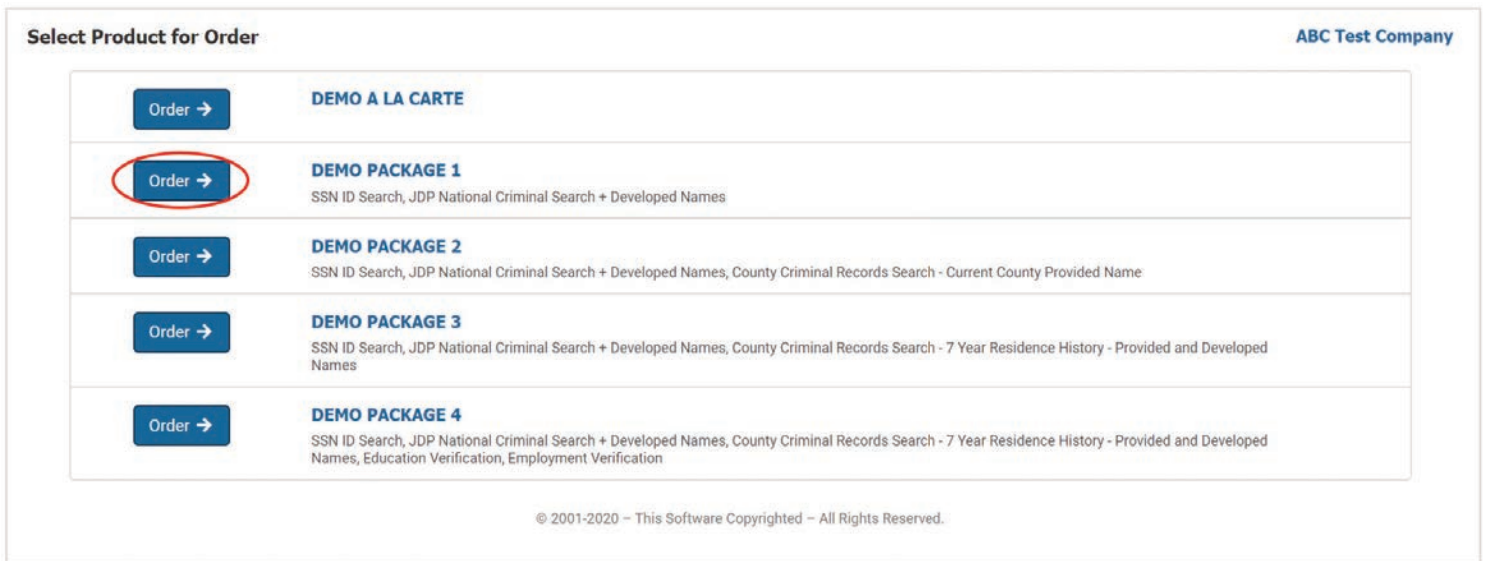
On this screen, please click the **'Order →'** button to the left of the package you want to select.

This will bring you to the **"Select Searches for Order"** page, which allows you to review the searches included within the package you selected.
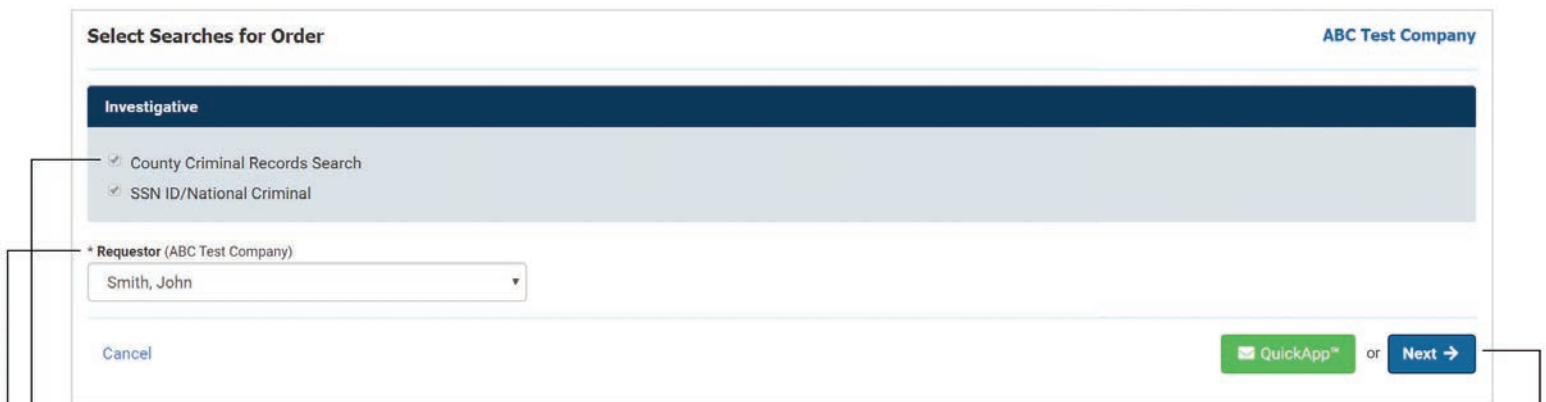
Each search is accompanied by a checkbox. If the checkbox is pre-selected, that is a "required" search. If the checkbox is empty, that is an "optional" search and can be selected if you would like to include it in the package.

At the bottom of the screen, there is a drop-down box for 'Requestor'. This is a required field. The 'Requestor' should auto-populate with the user who is logged-in, placing the order. You can change the 'Requestor' to another user within your organization. The 'Requestor' is notified upon completion of the report via email.

You have two ordering options on the **"Select Searches for Order"** page: ![QuickApp] or ![Next →]

- **QuickApp:** this process requires you to enter the applicants last name, first name, and email address. This triggers an email to the applicant with the background questionnaire for them to fill out and complete.

- **Next:** this process requires you to fill out all applicant information needed to fill out and complete the background questionnaire.

If '**QuickApp**': Once you click 'QuickApp' on the **"Select Searches for Order"** screen, you will arrive at the **"QuickApp™ Order"** screen as seen below:

On the **"QuickApp™ Order"** screen you are asked to enter the applicants last name, first name, and email address. Those three fields are "required" fields as marked by an asterisk (*). The "From Sender's E-mail Address" field is also required, but should pre-populate with the 'Requestors' email address. All other fields listed are optional, and are intended for your internal use only.

After filling out the required fields, you have two sending options, **'Send & Next'** or **'Send'**:

Send & Next: This returns you to the **"QuickApp™ Order"** screen and allows you to send another 'QuickApp' to a different applicant using the same package. If you click 'Send & Next' you will return to the **"QuickApp™ Order"** screen, and you will see a green confirmation banner for the 'QuickApp' file you just sent as shown below:

From there, you can continue this process for multiple applicants. Please note, 'The JDP Platform' also allows you to send 'QuickApp' batches. For more on the "batch" ordering, please refer to page number 20 of this user guide.

Send: This will trigger the 'QuickApp' email to the applicant with the background questionnaire and direct you to the "Applicant Pending Reports" page as shown below:

This "Applicant Pending Reports" page shows you all "pending" or outstanding 'QuickApp' background questionnaires for your organization. For more on the "Applicant Pending" queue, please refer to page number 10 of this user guide.

If **'Next':** Once you click **'Next'** on the **"Select Searches for Order"** screen, you will arrive at the **"Certification"** page as shown below:

Certification

Please review the following and acknowledge acceptance of the terms.

By clicking "accept" you certify that a consent and disclosure authorization form has been signed and obtained from the individual who is the subject of this report, in compliance with all applicable laws pertaining to an investigative consumer report as defined in the Fair Credit Reporting Act.

Accept Terms   Cancel

On this page you asked to 'Accept Terms' and certify that a consent, and disclosure authorization form has been signed and obtained from the individual who is the subject to the background check report.

After accepting the terms on the certification, you will arrive at the **"Applicant"** screen as shown below:

Applicant

Reference: Position/Title: Proposed Salary:

Applicant Info

Please provide the applicant's **legal name** as shown on a driver's license or other government issued identification.

* Last Name: * First Name: * Middle Name: Generation: * SSN: * Confirm SSN: * DOB:

☐ No middle name

E-mail Address:

+ Former Name/Alias

Cancel

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Presearch   Next →

On this screen, you are asked to enter the applicants last name, first name, middle name, social security number (SSN), and date of birth (DOB). Those fields are "required" fields as marked by an asterisk (*). All other fields listed are optional, and are intended for your internal use only.

After filling out the required fields, please click **'Next → '**. This will bring you to the **"Applicant Address"** page as shown below:

Current Address

◉ Domestic   ○ International

Current Address

STREET ADDRESS

ZIP CODE	CITY	- ▾

+ Previous Address

Save Draft   Cancel

Next →

On the **"Applicant Address"** page, you are asked to enter the applicants current address. Although there are no asterisks on this page, all fields are required. Please enter the applicants current street address, zip code, city, and state. Please note, when entering the applicants current zip code, the system will auto-populate the city and state based on the zip code entered.

After filling out the required fields, please click '**Next** → '. This will bring you to the **"Order Summary"** screen as shown below:

Order Summary

ABC Test Company - Demo Package 1
Order Entry *step* **3** *of* **3**

Applicant: ✏   JOE CLEAN
(111-22-3333, 01/01/1980)

Current Address: ✏   1234 TEST ST
PITTSBURGH, PA 15230

Search Summary for Demo Package 1		Fees	Charges
National Criminal Database Alias Search	NATIONWIDE	$0.00	$0.00

Additional fees may apply at time of fulfillment.
Orders that have begun the fulfillment process are not refundable.

Estimated Subtotal: 0.00
Sales Tax: $0.00
Estimated Total: $0.00

Authorization: None Attached

Select authorization file to attach to Order:

Upload File
Choose File
– or –

Drag File
Drop Zone

Order Entry Notes

Save Draft   Cancel

Complete Order & Next →   Complete Order →

The **"Order Summary"** screen allows you to review the applicant information inputted, before submitting the order. It also shows the package that was ordered, the seaches contained within that package, and the charges/fees associated.

There is an "Authorization" section on the **"Order Summary"** screen, this allows you to upload or drop consent and disclosure authorization signed by the client. This is not required, but is a helpful way to keep all consent and disclosure authorization with the file for auditing purposes.

In addition to the "Authorization" section, there is an "Order Entry Notes" section where you can add any notes regarding the applicant or the order you are placing. Again, this is not required and is intended for your internal use only.

Once you have reviewed the "Order Summary" information, you have two options for completing the order, **'Complete Order & Next →'** or **'Complete Order →'**:

Complete Order & Next → : This returns you to the "Certification" screen and allows you to allows you to proceed with entering another applicant's information, using the same package.

From there, you can continue this process for multiple applicants. Please note, 'The JDP Platform' also allows you to send 'QuickApp' batches. For more on the "batch" ordering, please refer to page number 20 of this user guide.

Complete Order → : This will take you to the "Pending" report you just submitted as shown below:

Report Results - #5662515 - CLEAN, JOE		ABC Test Company
		John Smith

[View] [Print] [+ Add to Order]   [? Request Help] [New Order ▾]

Order Details ↑

Status:	**Pending**		
Order Date:	04-09-2020 3:07 PM MDT	Requestor:	John Smith
Report Date:	04-09-2020 3:07 PM MDT	Email:	rossmontanti@jdp.com
File Number:	5662515	Phone:	(724) 831-8140
Report To:	ABC Test Company / ABC Test Company	Alt.Phone:	-
	8000 brooktree rd	Fax:	-
	Wexford, PA 15090	Product:	Demo Package 1
		Charges:	$0.00 👁

Applicant Information ↑

Name:	CLEAN, JOE	SSN/DOB:	XXX-XX-3333 / 01-01-XXXX
Email:	-	Phone:	-
Address:	1234 TEST ST, PITTSBURGH, PA 15230		

Batch Ordering

A ".CSV" spreadsheet is required to place a batch order. JDP Client Services team can provide a batch template with the required fields in .CSV format for either type of batch upload.

You can place "QuickApp" orders or "Direct" (manual) orders via batch upload. Please see the example spreadsheets below:

QuickApp Batch Template:

	A	B	C	D	E	F	G
1	QuickApp	Product Name	Screenings	FirstName	MiddleName	LastName	email
2	yes	Demo Package 1	default	Bob		Dole	bob.dole@none.com
3	yes	Demo Package 2	default	Stephanie		Lynn	stephanie.lynn@none.com
4	yes	Demo Package 2	default	Bill		Smith	bill.smith@none.com
5	yes	Demo Package 3	default	Anne		Wilkinson	anne.wilkinson@none.com
6	yes	Demo Package 4	default	Ethan		Brooks	ethan.brooks@none.com
7	yes	Demo Package 3	default	Ryan		Jacobs	ryan.jacobs@none.com
8	yes	Demo Package 1	default	Barbara		Moore	barbara.moore@none.com

- QuickApp = set to "yes"
- Screenings = set to "default"
   *Column headers cannot have spaces in them. Spaces will cause invalid upload attempts.

Direct Order (Manual) Batch Template:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	FirstName	MiddleName	LastName	NoMiddleName	SSN	DOB	AddressNumber	AddressStreet	AddressCity	AddressState	AddressZip	Email	ProductName	Screenings
2	Bob	James	Dole		111-22-3333	10/15/1984	740	West St	Milwaukee	WI	53205	bob.dole@none.com	Demo Package 1	default
3	Stephanie		Lynn	yes	333-22-1111	5/2/1976	568	Central Ave	Los Angeles	CA	90020	stephanie.lynn@none.com	Demo Package 3	default
4	Bill	Michael	Smith		123-45-6789	2/26/1980	116	Creek Ln	Boston	MA	02120	bill.smith@none.com	Demo Package 3	default
5	Anne	Marie	Wilkinson		987-65-4321	8/4/1991	606	Boulder St	Austin	TX	78720	anne.wilkinson@none.com	Demo Package 4	default
6	Ethan		Brooks	yes	111-55-9999	12/23/1986	103	Lake Dr	Orlando	FL	32808	ethan.brooks@none.com	Demo Package 1	default
7	Ryan	Michael	Jacobs		999-55-1111	1/31/1973	450	Park Pl	New York	NY	10001	ryan.jacobs@none.com	Demo Package 2	default
8	Barbara	May	Moore		000-11-0101	6/19/1990	322	Grant St	Pittsburgh	PA	15237	barbara.moore@none.com	Demo Package 4	default

- Screenings = set to "default"
   *Column headers cannot have spaces in them. Spaces will cause invalid upload attempts.
   **For Direct Order "Manual" Batch uploads, middle names are a required field. If the applicant does not have a middle name, please enter "yes" into the "NoMiddleName" column for that applicant.

Again, batch templates must be in saved as a ".CSV" (Comma elimited) file. When saving your spreadsheet, please use the option shown below:
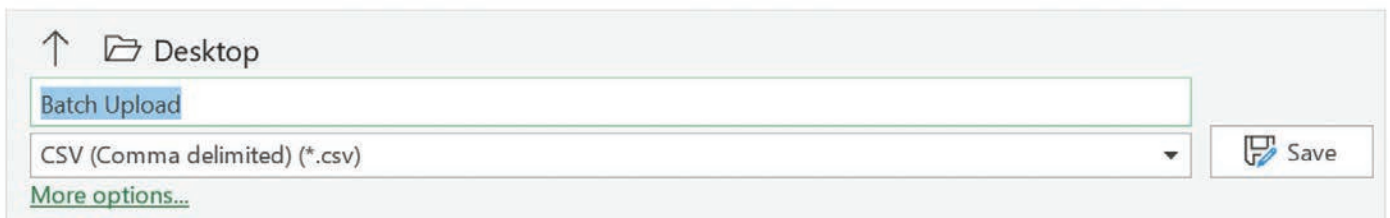
Once you've saved your batch file to your computer, log-into 'The JDP Platform' and hover over the 'Order' tab with your cursor and click 'Batch Order'.
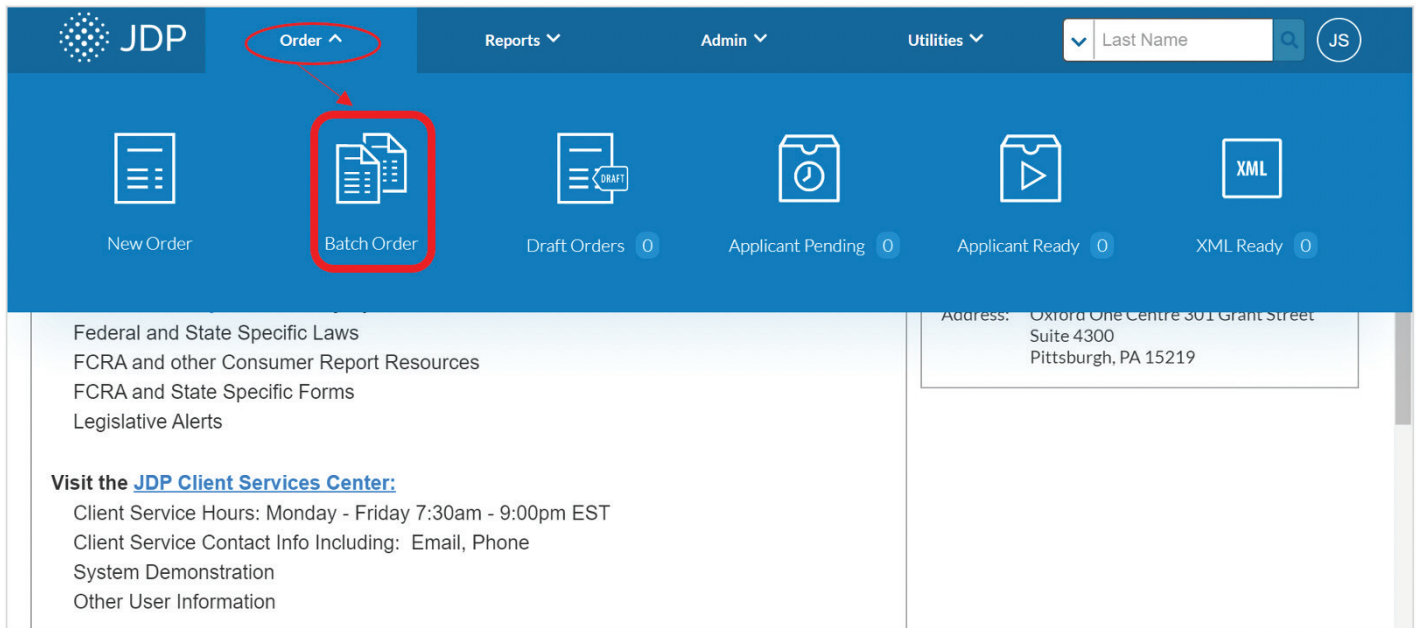
You will arrive at the batch order **"Certification"** page. By accepting the terms on the **"Certification"** page, you acknowledge consent, and disclosure authorization forms have been signed and obtained from the individuals subject to the background check reports ordered via batch order.

The **"Certification"** page also reminds you to review the batch info so you do not incur unecessary charges by submitting invalid or incorrect info.
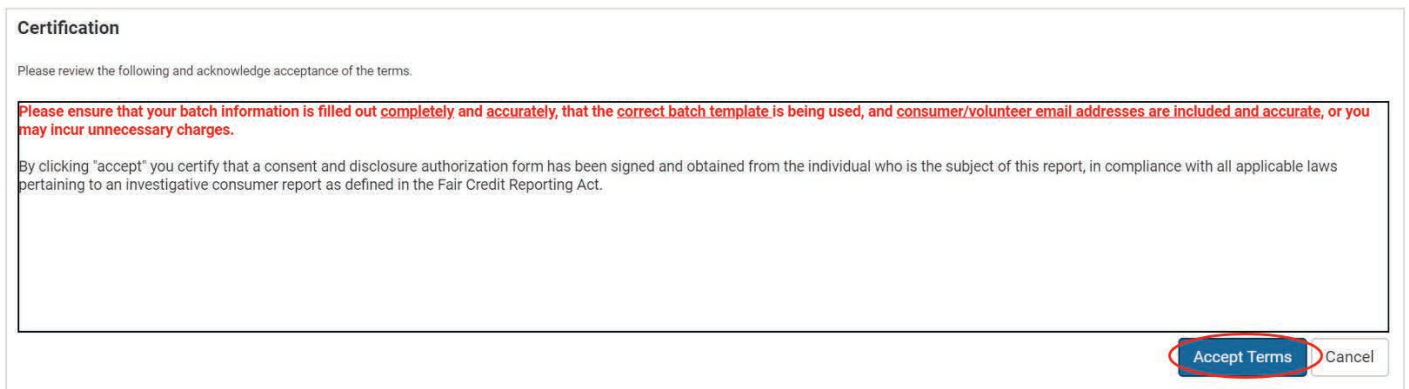
After accepting the terms on the certification, you will arrive at **"Batch Order Import"** page shown below:
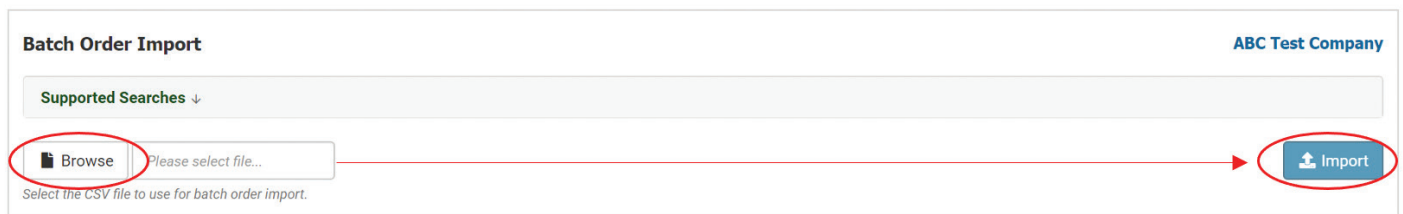
Click the **'Browse'** button an choose the batch .CSV spreadsheet from your computer. Once the spreadsheet is selected, click the **'Import'** button. That will generate the following pop-up:
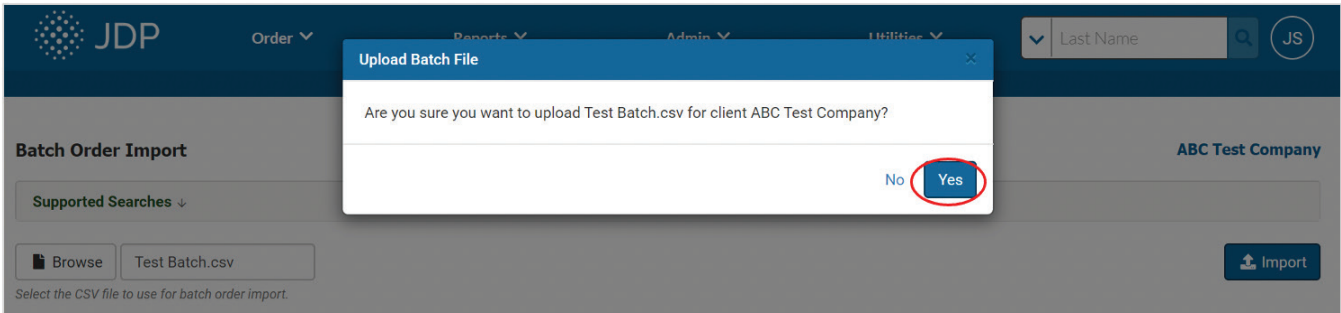
Click 'Yes' to confirm your submission. After you submit the batch, the orders will begin processing.
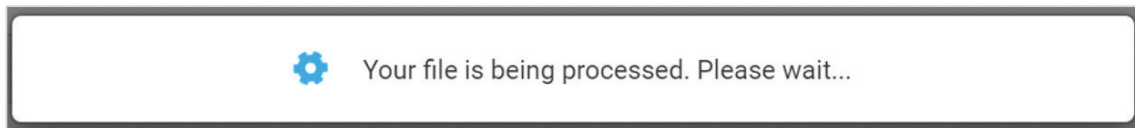
When complete, you will come to the **"Batch Order Import"** screen, as shown below:

Batch Order Import

Import results for file Test Batch.csv
2 - OK (DOLE / 5687006)
3 - OK (LYNN / 5687007)
4 - Invalid and/or missing data values. Invalid Postal Code: 2120.
5 - Invalid and/or missing data values. Invalid SSN: 987-65-4321.
6 - OK (BROOKS / 5687008)
7 - OK (JACOBS / 5687009)
8 - Invalid and/or missing data values. Invalid SSN: 000-11-0101.

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Any line item listed in **green text** is considered a successful submission. The line items in **red text** are invalid or unsuccessful submissions. The invalid submissions will tell you why the submission failed, whether it be an invalid SSN, address, etc.

If you experience difficulty with a batch upload or have questions, contact our Client Services Team:

JDP Client Services
clientservices@jdp.com
855-940-3232
www.jdp.com/jdpsupport

Report Page Navigation

The report page is broken down into six main sections. Those sections include, **'Order Details', 'Applicant Information', 'Search Results', 'Attachments', 'Disclosures and Forms',** and **'Client Notes'.** A description of each section and some other details are included below:

Order Details
The **'Order Details'** section includes particulars about the report. It tells you the order status, the date the order was placed, the file numer, the company the report belongs to, the requestor or the person who placed the order, their contact information, the package or product that was ordered, and the charges associated with that particular report.

Applicant Information
The **'Applicant Information'** section includes information on the applicant who the report was ordered for. It provides the applicants name, email (if applicable), current address, SSN, DOB, and phone number (if applicable).

*As a standard setting, JDP masks the first five digits of the applicants SSN and the year within the applicants DOB.

Search Results
Under the **'Search Results'** section, you have the ability to see the different searches that were ordered. The search name is listed to the left and the status of that search can be found on the right. You have the ablity to click into each of the searches by clicking the search name.

Search Results   + Add to Order

Search	Status	
County Criminal Records Search - Current County - Provided Name		+
PA-ALLEGHENY (CLEAN, JOE)	Complete	🖨
SSN ID Search/JDP National Criminal Search + Developed Names		
NATIONWIDE (CLEAN, JOE)	Complete	🖨

*Within this section, if additional searches are contained within the package that was ordered, you have the ability to add those searches even after the order was placed. To add a search or searches to the order, please click the "Add to Order" button on the upper right hand side of this section. Once this option is selected, you will return to the 'Select Searches for Order – Add To Order' screen that you would see when placing the initial order. Simply select the search or searches you want to add and click 'Next'. From there you will be asked to "Accept Terms" on the 'Certification' screen before entering the new search info for that applicant.

Attachments

Within the **'Attachments'** section, users have the ability to view the "Applicant Authorization", "Applicant Authorization Forms", and "QuickApp – Electronic Signature Consent – Consent Given". Those documents and forms can be printed or downloaded once they are selected.

You can also add documents to this section. Simply click the '+' dropdown. From there you can select "Attachment" or "Authorization Forms". If you select "Attachment" you can choose attachments or drag and drop them into the dropzone. This will add the file or document to the given report. If you select "Authorization Forms" under the dropdown, you can add an internal authorization you received from the client and title the document within the 'Attachments' section.

Attachments   + ▾

Applicant Authorization
Applicant Authorization Forms
QuickApp - Electronic Signature Consent - Consent Given

Disclosures and Forms

The **'Disclosures and Forms'** section includes a dropdown where you can select various disclosures and forms such as a "Consumer Copy", "Pre-Adverse Action Letter", "Adverse Action (Employment Denial)", etc. These can be downloaded and edited, emailed, or sent as a text message from within this section.

Disclosures and Forms ⚠

--Select Disclosure or Form-- ⌄

📄 Edit   ✉ Email

☐ By checking the box and providing the applicant's phone number, I certify that the Applicant has consented to receive text messages for invites and disclosures.

Client Notes

The **'Client Notes'** section includes any notes associated with the report. JDP's processors may add notes or you as a user can add notes to this section.

Additional Info

Above the 'Order Details' section, you have five buttons which include, "**View**", **"Print"**, **"+ Add to Order"**, **"? Request Help"**, and **"New Order"**. The functionality of each is explained below:

- **View** – Provides the report as a full document which includes all sections. This full document can be downloaded or printed from the 'View' screen.

- **Print** – Allows you to print the report or save it as a PDF.

- **+ Add to Order** – If additional searches are contained within the package that was ordered, this button allows you to add searches to the report even after the order was placed. When selected, you will return to the 'Select Searches for Order – Add To Order' screen that you would see when placing the initial order. Simply select the search or searches you want to add and click 'Next'. From there you will be asked to "Accept Terms" on the 'Certification' screen before entering the new search info for that applicant.

- **? Request Help** – This button is linked to your email and will pull up a new email addressed to clientservices@jdp.com.

- **New Order** – From this drop down you can perform the following options:

    o **Same Product – New Applicant:** allows you to place a new order with the same product or package for a new applicant.

    o **Same Product – Same Applicant:** allows you to place a new order with the same product or package for the same or current applicant.

    o **Choose Product – New Applicant:** allows you to place a new order with a different product or package for a new applicant.

    o **Choose Product – Same Applicant:** allows you to place a new order with a diffent product or package for the same or current applicant.

View Reports

Pending Reports – List of open reports that have at least one item pending. This queue includes 'QuickApp' background questionnaires that have been completed by the applicant, but are awaiting results or are being processed by JDP.

Completed Reports – Displays reports with a completed status. There are reports where results have been received and fully processed by JDP.

Disclosures Queue – Gives users a single location to manage disclosures for all reports and clients, bringing them to the forefront to ensure they are being handled timely and appropriately.

Last Reports – Displays the most recent ordered reports in chronological order. This queue includes your most recent "completed reports" (last 200 reports).

Advanced Search – This search function allows you to input one or more fields to complete a more specific search. You can search by applicant information, report information, and/or client information.

Adjudication

Adjudication, or the Report Decision Tool is a feature that allows users to apply an at-a-glance look at what actions or steps are needed to take based on parameters that have been set within your own organization. Clients with this enabled and users with this permission can set the report decision.

Adjudication Benefits:
- Increases productivity with graphical view
- Creates consistency
- Improves processes
- Automation with disclosure letters (fees included)
*Adjudication is available for Enterprise level clients.

If Adjudication is enabled and you have proper user permissions, you will have the 'Decision Tool' on the "Report Results" screen as shown below:

To make a decision on a report, click the down arrow to the right of the 'Decision Tool' circled above. This will open a drop-down box with the standard report decsions as shown below:

Report Results - #5662518 - MESS, HANK

ABC Test Company
John Smith

View | Print | + Add to Order | ? Request Help | New Order ▼

Order Details ↑

Status:	**Complete**	Decision:	▼
Order Date:	04-09-2020 3:10 PM MDT	Requestor:	🟢 Approved (per client specifications)
Report Date:	04-10-2020 1:59 PM MDT	Email:	🔴 Declined (per client specifications)
File Number:	5662518	Phone:	🔵 Withdrawn
Report To:	ABC Test Company / ABC Test Company	Alt.Phone:	🟡 Review
	8000 brooktree rd	Fax:	⚫ Pending: No Results Reporting
	Wexford, PA 15090	Product:	🟠 Approved-Action required by Field
		Charges:	🟣 Second Drug Test Required
			⚪ Dispute
			🔵 No Drug Test Taken (per client specifications)

Applicant Information ↑

Name:	MESS, HANK	SSN/DOB:	
Email:	-	Phone:	
Address:	1234 TEST ST, PITTSBURGH, PA 15230		-

Once a "decision" has been made on a report, the report will show the "decision" as shown below:

Report Results - #5662518 - MESS, HANK

ABC Test Company
John Smith

View | Print | + Add to Order | ? Request Help | New Order ▼

Order Details ↑

Status:	**Complete**	Decision:	🔴 Declined (per client specifications) ▼
Order Date:	04-09-2020 3:10 PM MDT	Requestor:	John Smith
Report Date:	04-10-2020 1:59 PM MDT	Email:	rossmontanti@jdp.com
File Number:	5662518	Phone:	(724) 831-8140
Report To:	ABC Test Company / ABC Test Company	Alt.Phone:	-
	8000 brooktree rd	Fax:	-
	Wexford, PA 15090	Product:	Demo Package 1
		Charges:	$0.00 👁

Applicant Information ↑

Name:	MESS, HANK	SSN/DOB:	XXX-XX-1111 / 01-01-XXXX
Email:	-	Phone:	-
Address:	1234 TEST ST, PITTSBURGH, PA 15230		

Adding a New User

To add a new user, hover over the **'Admin'** tab with your cursor and click **'Manage Client'.**

Under **'Manage Client'** you will come to the **'Users'** tab by default. By clicking the **'Add User'** button you will be taken to the **"New User"** screen, as shown below:

In the Personal Information section users will want to include as much information as possible. If a phone number, fax number, or an email address in not entered for the user, the information from the "Client Contact" will be used for communications.

Under the Account Information section, please select which login type best fits the user. There are 4 options:

- **Standard** – Standard users have Non-Administrative, Accounting, and Administrative access according to permissions selected.

- **Link Only** – Linked accounts allow you to enable access to multiple clients for a single user and support different permissions for each client.

- **XML Only** – An XML user can only be used for placing orders through the XML Interchange (when an integration is present). It will have extended expiration and inactivity thresholds, but you must enter an IP Address restriction within the 'Permissions' tab.

- **No Access** – This user does not have any permissions or access to the site but will be listed as a=possible requestor when ordering a report.

Once you select a login type and enter a username you can check a box "Send New Account Setup Email". This will remove your ability to set a password and send the user an email to complete account set-up. When the user clicks the link within the email to complete account set-up, they will be required to set their own password and enable MFA for their account.

The first time a user logs into their account they will be required to provide a 6-digit verification code as a part of the MFA or "Multi-Factor Authentication" process. This code provides an added layer of security to ensure the user is the one accessing the account. The MFA code can be set up to be sent to either an email address, authenticator app, or text message.

You can check the box to disable MFA editing for the user. This makes it so the client cannot go in and edit it themselves within their profile settings.

The MFA will only be required upon the first login as long as your browser enables cookies. You will be required to enter a MFA code each time you login using a new device, a new browser, have recently cleared your browsing history, or cache.

After saving the new user info, you will arrive at the "User Permissions" tab. From there you can select specific permissions for each user. These selections are organized by Non-Administrative, Accounting, and Administrative.

Non-Administrative Permissions:

- **Order Reports** – Allows the user to place an order (Manual, batch, and draft orders)
- **Order QuickApp** - Allows user to place a "QuickApp order" and push the "QuickApp" out of the applicant ready queue.
- **View Reports** - Allows a user to view reports.

Administrative Permissions:

- **Order reports for other users** – Allows the user to order reports on behalf of another user.
- **Order reports for child clients** – Provides the user the ability to order reports for a child client. *Only when child accounts are present
- **View all reports for other users** – Allows the user to see reports ordered by other users.
- **View all reports for child clients** - Provides the user the ability to view child client reports. *Only when child accounts are present
- **View management reports** - Allows the user to view and select management reports from within the 'Management' tab.
- **Manage users** – Provides the user the ability to add or edit users under the account.
- **Move report** – Allows the user to move reports to a new client or requestor.
- **View document library** – Grants the user access to view the document library within the 'Help' section of your in top right-hand corner (click your initials to navigate to the 'Help' section).
- **User Access IP list** - If used, this list limits the users ability to access 'The JDP Platform' from unauthorized IP addresses. You can set specific IP addresses or range for user to access from

Accounting Permissions:

- **View prices** - Allows the user to view prices within in each file.
- **View details** – Provides user with details of the pricing and searches on the report results page.
- **View invoices** – Allows the user to view invoices that have been generated.

Management Reports: Provides the user the ability to run the various reports offered. By selecting a specific report, you grant the user access to run that specific report.

View Reports Extra Settings:

- **Allow user to process** - Allows the user to set a report decision on the report results page. *Only when decision reporting is enabled on your organizations account
- **View vendor notes/messages** - Provides the user with communication from JDP on the search.

Along with the 'Details' and 'Permissions' tab, the 'Linked Accounts' tab allows for client configuration to include parent/child relationships. This hierarchy works like a pyramid, where you can create as many layers as needed, but access can only go down the chain, not up or across.

View Invoices

With "Admin" permissions, users can view, search, and take action on all existing invoices. Hover over the 'Admin' tab and click 'View Invoices' to see a list of your organizations invoices.
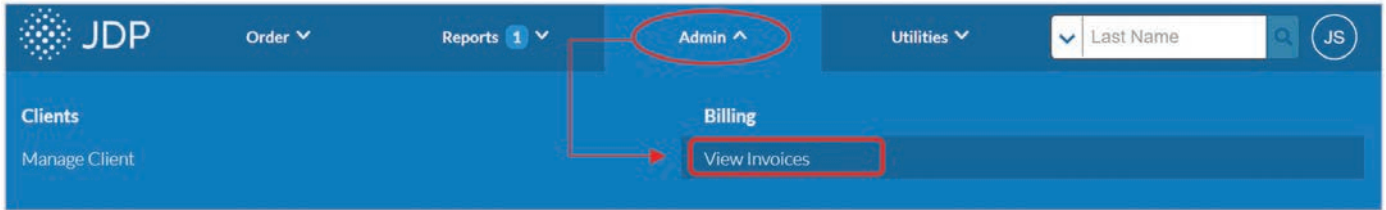
This will bring you to the "View Invoices" screen below:
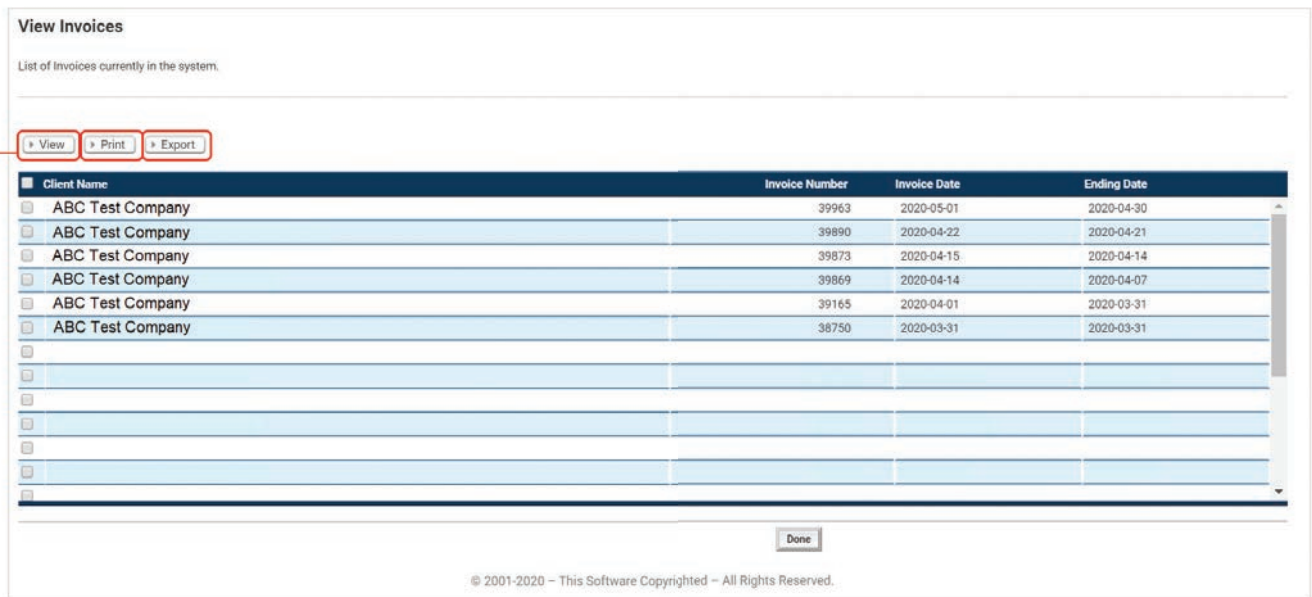
From this page, you can view, print, or export invoices. To select an invoice, click one or more of the empty "checkboxes" on the far left side of the page. Once an invoice or invoices are selected, you have three options:
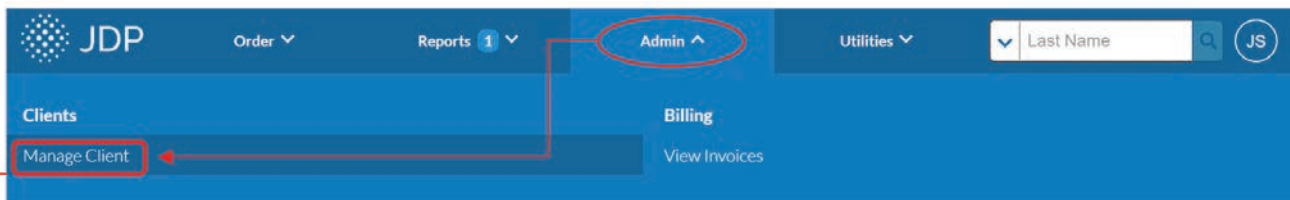
- **View** – Provides the itemized invoice in its entirety as a single document.
- **Print** – Users can print a physical copy of an invoice or "Print to PDF" to save as a file.
   *Invoices can be printed individually or as a group.
- **Export** – Allows you to export the invoice data to a .CSV file. When exporting, you can:
   - o Export Totals Only
   - o Export Total – Group By Export Inventory Item (Item Code or Order Entry Type)
   - o Export With Details
      *Invoices can be exported individually or as a group.

Our invoices are compatible with QuickBooks and many other accounting systems. Users can export invoices that are compatible the systems or formats below:

- CSV
- Peachtree
- GP – Credit Cards
- MYOB – Clients
- Sage BusinessWorks

- QuickBooks
- AaaTeX IIF Importer
- GP – Invoice
- MYOB – Invoice
- Xero

Manage Billing

To manage billing, under the 'Admin' tab, select 'Manage Client'.

From the "Client Users" screen, you will have to toggle to the 'Billing' tab as shown below:

The billing tab allows you to enter or update credit card information for your organization. If you would like to set-up autopayment via credit card, please contact our Client Services team for assistance.

clientservices@jdp.com
855-940-3232