

## eShortline Program on eWorkforce

### Contractor User Guide

#### OVERVIEW

This quick start guide has been created to help our clients with navigating through the most common tasks in the new eShortLine software platform. As always, you can contact us at 855-383-7434 to speak with a customer service representative or email us at [customer.support@everifile.com](mailto:customer.support@everifile.com).

The following items are required for an applicant to become certified:

- An approved background report (no more than 90 days old)
  - A signed consent form (consent forms are only valid for 2 years)
- An approved badge photo
  - Photo Requirements
    - Headshot only (top of head to just below chin, not full body)
    - Image is in focus, not blurry or pixilated
    - No sunglasses or hats
    - Background is a neutral color, no patterns or dark walls
    - Image file size is no larger than 500KB
    - File type is a .gif, .png, .jpeg or .jpg
    - Resolution is greater than 150px by 150px
- Completed online training

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## LOGGING IN

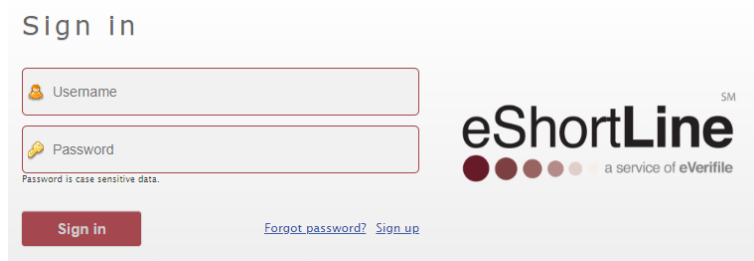
Go to <https://eshortline-eworkforce.everifile.com> and enter your username and password. If this the first time logging in, you should have received an email that contains a link to send you to this page. The system will then require selection of security questions and the creation of a new password.

### Required Tasks

You will see a list of required tasks once logged in successfully. Once a task has been resolved, select Complete to remove it from the list. Possible tasks are described in the next section.

### List of Required Tasks on the toolbar.

- **Upload Photo**- This task generates when a photo is needed for an applicant to receive a badge.
- **Rejected Photo**- This task generates when an uploaded photo does not meet initial photo requirements. To upload a new photo for the badge, click the applicant's name in the required task list.
- **Recertification** – This task generates 90 days in advance of when an applicant is up for recertification. Notification of this requirement is also sent via email. The steps below are required to recertify an applicant:
  - A new, signed consent form
  - The applicant will need to sign in and complete training and testing.



If not recertifying this applicant, please be sure to inactivate the applicant to maintain compliance and stop the reminders from coming. Instructions for how to complete this action are listed later in the user guide.

- **Username Notification** – This task generates to provide the applicant's username and applicant id. The applicant id is the applicant's initial password.
- **Completed Report Review** – This task generates when background reports are completed.
- **Approval** – This task generates when applicants are approved for the program.
- **Appeal** – This task generates when applicants have been denied during the initial review of their background check.
- **Denied Applicants** – This task generates when the applicant has been denied by the program owner after appealing.

## Applicant Dashboard

- Background check (magnifying glass icon.)

|  | First Name | Last Name | SSN/SSI     | Report Status |  |  |  |  | Report Complete Date | Created Date | Badge Expiration Date |
|--|------------|-----------|-------------|---------------|--|--|--|--|----------------------|--------------|-----------------------|
|  | Alan       | Smith     | xxx-xx-4D5D | Completed     |  |  |  |  | 05/09/2018 10:28     | 05/09/2018   |                       |
|  | Susan      | Customer  | xxx-xx-4a12 | Completed     |  |  |  |  | 05/08/2018 10:48     | 05/08/2018   | 05/08/2019            |
|  | Jackie     | Mathis    | xxx-xx-6578 | Completed     |  |  |  |  | 05/08/2018 12:09     | 05/08/2018   |                       |

- Training (worker icon)
- Testing (screen icon)
- Photo (camera icon)
- Badge (badge icon)

The following categories of information for each applicant are visible:



The Applicant Dashboard provides an overview of all applicants' status in the program. The colored circles indicate the current status

- Grey: No action has been taken
- Green: Clear / Approved
- Yellow: In progress
- Red: Failed / Needs Review
- Report status: "In Progress" if not yet finished, "Completed" in green if approved, or "Completed" in red if it needs review.

## APPLICANT ACTIONS

On the applicant dashboard, there is a list of buttons grouped under a category named Applicant Actions. This is a list of buttons that are available to assist with managing applicants. In this section of the user guide we will cover those actions.

### Submitting an Applicant (Individual and Multiple Entry)

Select Add Applicant and click Go. Add the applicant, select the desired program, and choose your location. The field program requires a motor vehicle reports. Make sure all fields marked with an asterisk (\*) are completed. Then click Save.

Please enter information carefully. **If first name, last name, SSN or DOB is edited after this initial creation, charges for a new background check will apply based on the applicant's living history and program fee.**

**International Ordering**

**Program-** When entering an applicant into the system, a prompt will appear requiring a selection be made based on the applicant's length of residency in the U.S.

**Option 1:** Applicants who have lived in the U.S. for the last seven years.

Applicant will undergo domestic screening only.

**Option 2:** Applicants who have not lived in the U.S. for the entirety of the last seven years. Applicant will undergo international screening and domestic screening.

**Option 3:** Applicants who have never lived in the U.S. Applicant will undergo international screening only.

**Adding an Applicant to a Location**

To Add an Applicant First:

Choose the location during the add an applicant function, before clicking Save. The applicant will appear under the specified location.

To Choose the Location First:

Choose the location. Click Add Applicant and fill out necessary information.

**Editing an Applicant/Uploading a Photo**

To edit an applicant, select their location. Then check the box to the left of the applicant's name and select Edit Applicant. Insert the correct information then click, Save.

**If first name, last name, SSN or DOB is edited after this initial creation, charges for a new background check will apply based on the applicants living history and program fee.**

Click the camera icon. Upload the photo and save. The yellow dot means under review. Photos must be headshots, in front of a light-colored background. Face may not be obscured

Photo Requirements



- Headshot only (top of head to jt below chin, not full body)
- Image is in focus, not blurry or pixilated
- No sunglasses or hats
- Background is a neutral color, no patterns or dark walls
- Image file size is no larger than 500KB
- File type is a .gif, .png, .jpeg or .jpg
- Resolution is greater than 150px by 150px

**Bulk Applicant Uploads**

The bulk uploading feature was created to enter multiple applicants at one time. Click on the bulk upload button. Click on the **here** hyperlink to download a sample template. Once you have added all your applicants' information into the template upload the spreadsheet and the fields should automatically map to the existing fields in the system. After the applicants are added, you will have the ability to enroll them into a program.

The list of required information is listed below:

- First name
- Middle name
- Last name
- Name suffix
- Date of birth
- Driver's license number
- Phone number
- Email address
- Address 1

Maximum upload file size: 1 MB

Download the Bulk Upload Template for countries United States and Canada [here](#)

After uploading, match the columns in your batch file to the corresponding identifiers on the right. Just drag and drop the column labels from left to right.

| Header Values | Mapping | Field Name                | Data Type |
|---------------|---------|---------------------------|-----------|
|               |         | currentAddress.country    | COUNTRY   |
|               |         | currentAddress.city       | TEXT      |
|               |         | currentAddress.postalCode | TEXT      |
|               |         | currentAddress.province   | TEXT      |
|               |         | currentAddress.street1    | TEXT      |
|               |         | currentAddress.street2    | TEXT      |
|               |         | middleName                | TEXT      |
|               |         | primaryPhoneNumber        | TEXT      |
|               |         | lastName                  | TEXT      |
|               |         | nameSuffix                | TEXT      |
|               |         | email                     | TEXT      |
|               |         | gender                    | TEXT      |
|               |         | birthDate                 | DATE      |

- Address 2
- Province/State
- Country

### **View Reports**

Select the box next to the individual. Click View Reports. Select Preview. The report details will appear in the report window in PDF format.

Report status is available for each report:

- COMPLETED for a completed report (see earlier section for color status)
- IN PROGRESS for a report that is pending
- REJECTED for a report with issues

### **Applicant History and Notes**

To view the history of an applicant, click History. This will display every action that has been completed on the applicant. To view and enter notes for an applicant, click Notes.

### **Assigning a Program**

Select the applicant by checking the box by their name and click Programs. Check the box next to the desired program and then click Enroll

### **Denial Process- Appeal and Dispute**

Applicants may be denied access to the UtilitySafe program due to the following:

- A felony conviction within the last 7 years
- An Active Warrant
- An open felony court case
- SSN discrepancy
- Your release from incarceration within the last 5 years
- A history of pleading guilty to felony and/or misdemeanor crimes of concern
- Out of service area
- An Open Court Case
- Disqualifier
- Background check cancelled by contractor
- Background check of concern
- DUI conviction in last year
- Multiple DUI convictions
- Registered as a Sex Offender
- Suspended or revoked driver's license

Below are the most common reasons for an SSN discrepancy:

| Reason for SSN Discrepancy                       | Example   | How to Resolve  |
|--|---|---|
| Applicant's legal first name was not entered     | Entering "Dan" instead of "Daniel"  | Update applicant's First Name*  |
| Multiple last names appear                       | Women with maiden names or applicants with 2 last names   | <ul style="list-style-type: none"> <li>• Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver's license/ passport) to Appeals folder through Documents button</li> <li>• Update applicant's last name to contain all last names*</li> </ul> |
| Multiple first names appear                      | Applicants who often go by their middle names or nicknames  | Upload front/back of Social Security card and front/back of government- issued ID (ex. Driver's license/ passport) to Appeals folder through Documents button   |
| Different person's name/ address history appears | Applicant's name is Adam Smith, but San Roberts is the only name that appears on the address history or appears several times                       | <ul style="list-style-type: none"> <li>• Check SSN*</li> <li>• Upload Social Security card and government-issued ID to Appeals folder</li> </ul>  |
| No Address History OR SSN Validation Fail        | <ul style="list-style-type: none"> <li>• Applicant is 25 years old or younger</li> <li>• Applicant has held an SSN for less than 7 years</li> </ul> | Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver's license/ passport) to Appeals folder through Documents button  |

Determine if an **appeal** or **dispute** is required for your applicant. (only one should be requested)

*Appeals can be made in these scenarios, if the information background report provided is **accurate** but consideration of extenuating circumstances is requested.* To file an appeal, select the denied applicant's name. Upload any documentation needed to support the appeal and click Appeal. Then, click the railroad you are appealing to and enter a reason for the appeal. Click Appeal Action. Click Yes in the confirmation box to file the appeal. If an applicant's appeal is denied, it will not be reconsidered.

*If information returned in a background report is believed to be **inaccurate**, please file a dispute as soon as possible.* Click the box next to their name, and then Dispute. In the Notes section, insert specific information about what the applicant is disputing. Then click Add.

### **Reprint Badge**

Generating a new badge will cause a badge for the completed program to be reprinted and shipped. There is a standard badge fee that applies. If there are additional programs that are not yet complete, another badge will be automatically created and shipped when all programs have completed.

### **Print Report**

Select an applicant and click Print Report to print the consumer summary report.

### **Moving an Applicant**

You may have an applicant that is in one location for your company and you may need to assign the applicant to a different location. The move applicant feature allows you to move the applicant to the desired location. Click Move Applicant under Applicant Actions.

- Applicant must be in an active status.
- Applicant must either: have an active eShortLine badge OR not be enrolled in any programs.
- Moves must take place in the company's main account.

### **USPS Tracking**

Access the tracking number for a shipped badge by clicking the box next to the applicant's name and selecting Tracking Number. Copy the number that appears and enter it on [www.usps.com](http://www.usps.com).

### **Deactivating/Reactivating an Applicant**

To deactivate an applicant, check the box next to their name and click Deactivate. Deactivating an applicant will remove all required actions and mark the status of the applicants as in-active. Please carefully select this option, as reactivating an applicant may cause additional charges associated with reactivation.

To reactivate an applicant, go to Edit Applicant, click the Active checkbox and save. If less than 90 days since deactivation, this applicant will be reactivated and maintain the same expiration date prior to deactivation. There is no charge unless a new badge is requested.

If more than 90 days since deactivation, making this selection will generate a new background check, the applicant will be required to take training and testing, and a new badge will be issued once the process completes.

## **APPLICANT TASKS**

### **Retrieve Training and Testing Information**

To retrieve the username/password for an applicant, click Manage users, then Applicants. Enter the applicant's first or last name in the field, then click Search to find the applicant's username.

To reset the password, click Reset Password.



To restore training, click the button under the Restore Training column. If you have multiple locations, choose Locations, select the applicant’s location, and then click Account users to access the Restore Training option.

### Applicant Search Status

To search or filter applicants by status, click the Applicants tab and then Applicant Search Status. Choose the desired status from the drop-down menu. All applicants of that status will appear in a list. Export by clicking Export Results. Choose a date range to further refine your search.

### Summary Report

The summary report feature gives insight to each applicant in your program. The report includes:

- Company Name
- Applicant Name
- Last Name
- DOB
- State/Province
- Training Date
- Test Date
- Created Date
- Background Date
- Report Status
- Report Results
- Program Name
- Enrollment Date
- Program Status
- Applicant Status
- Renewal Date
- Denied
- If Denied, Denial Reason
- Appealed?
- Overturned
- Badge Issued
- Badge Number
- Job Title
- Admin Subscription Checkbox Date Time
- Admin Subscription Checkbox username
- Admin Program Enrollment Date Time
- Admin Program Enrollment username
- Applicant Checkbox Date Time
- Applicant username
- Top Parent Company Name
- Recertified Date

Click the Reporting tab, then the Summary Reports Tab. Choose All or a specific location, then Download Applicant Summary Report. Click OK to begin the download. Open the file to view.

## MY ACCOUNT

### Managing Users

Select My Account and choose Manage Users.

If you cannot see the add button, hold the button and use the CTRL (-) sign to zoom out on the application.

You can search for a user, enable or disable a user’s access, and create users.

The following are the user roles and their capabilities:

- Vendor Administrator - Full access to all locations and management of users including location administrators.

- Location Administrator - Access to manage users for locations, initiate and view background checks.
- HQ Accounts Payable - Access to view and pay invoices for all locations (if the account is set up for centralized billing.)
- Location Accounts Payable - Access to view and pay invoices for all locations.
- Location Notifier-Access to receive emails when applicant's badges are generated.
- Location Supervisor- Access to view and reset applicants' username and password. Access to view tracking information. Access to view but not modify applicants' information.
- HR User - Access to initiate and view background checks for a specific location.
- HR Viewer - Access to view background checks for a specific location.
- Vendor Admin without Billing- Full access to all locations and management of users including location administrators. Role does not have access to view billing information

### **User Info and Role Assignment**

Roles are defined by the type of activities you want the user to be able to perform. To edit a user, click Edit. To add a user, select Add. Add the user's name, email, and phone number.

Choose a role by selecting it and using the right arrow to add it to the right-hand screen. You can restrict user access to certain report types by selecting them and moving them to the left-hand screen. Click save. An email will be sent to the new user with login information and instructions on how to create their own password

### **Assign a user to Multiple Accounts**

If a user needs access to multiple accounts, contact Customer Support at 1-855-383-7434 or via email at [customer.support@everifile.com](mailto:customer.support@everifile.com).

### **Adding a Location**

Select Locations on the My Account drop-down menu. Click New Location Here.

To add a general location, highlight your company name and select New Location Here. If you wish to add a sub-location to an existing location, highlight it and click New Location Here.

### **Shipping Contact**

You can have badges and accessories sent to different locations. Go to the My Account tab then click Locations. Enter information for the person receiving packages from UtilitySafe at that location. Then click Save.

## **BILLING**

### **View Invoice**

To access the organization's invoices, click on My Account and choose Billing, click the invoice you want to view.

### **Updating Payment Information**

Click on My Account, then billing and then Update Payment. If there is an unpaid invoice, do not select pay now. The system is designed to automatically process payments with an updated card.

### **MY INFO**

The My Info tab includes contact information for the company, all of which can be edited.

### **DOCUMENT LIBRARY**

#### **Accessing Library**

Click My Account and then Documents.

#### **Uploading Documents**

users can upload required documents with unlimited storage space. Click Add Document. Select a system folder and document type. Click Save.

#### **Viewing and Printing Your Documents**

To view a document, select the folder and then click it. To print, right click with mouse and select Print.

#### **Deleting Documents**

To permanently delete a document, select the delete button to the right. Deleted documents are not recoverable.