General Information Services (GIS)
eQuest+ Ordering and Viewing Process

Client Name Here

Account Manager’s Info:

Every applicant on which you are running a background must fill out an authorization. This is a requirement BEFORE you run any type of background report.

The signed authorization must be kept on file with your organization. GIS will contact you directly if we are in need of a copy of the signed authorization. If needed, the authorization can be sent via fax to 877-590-4006.

PASSWORDS:
- Each user has a unique User ID and Password
- Immediately upon receipt of your password, please change it within the eQuest+ system
- Passwords must be at least 6 alpha-numeric characters and is case sensitive
- For security reasons, never give your password to anyone
- Passwords will expire every 90 days

SECURITY:
- For security reasons, the website times out after 20 minutes
- Please do NOT use the back arrow on your browser bar
- If an invalid User ID or Password is provided, eQuest+ will provide the following error message “User ID/Password does not match. Please re-enter.” After 3 invalid attempts, eQuest+ will lock the User ID. Please contact your account manager to have your User ID and Password reset.

To Order a Background Report

1. Go to website address:

2. At the eQUEST+ SIGN ON Screen:
   - Enter your USER ID and PASSWORD and click GO.
3. At the NOTIFICATION AND ACCESS SECURITY REQUIREMENTS screen:
   - You will only see this screen one time per day when you first log into eQuest+.
   - Click AGREE.
4. At the BULLETIN screen:
   - Will alert you to any potential impacts to your background screening program
   - Click NEXT.

5. At the JOB CLASSIFICATION SCREEN - choose the appropriate package/job class and click NEXT.

6. At the ORDER REPORTS: SERVICE MENU
   - Select “Submit eLink” in upper right corner
   - Click on + before SCREENING SERVICES to see the products ordered for this applicant.
   - Click Next

7. At the IDENTIFICATION INFORMATION screen enter all information requested.
Type the FIRST NAME, MIDDLE (if provided), LAST NAME.

Enter applicant’s email address

8. At the ORDER CONFIRMATION screen, review the information on this screen carefully. If changes need to be made to a particular screen click EDIT make the changes and click on RETURN TO CONFIRM. Once you click PROCESS ORDER you cannot go back to correct any information. If an error is detected after you have moved on to the next screen contact your Account Manager for assistance.

9. Once a request has been accepted, you will see ORDER SUCCESSFULLY SUBMITTED FOR:

- Record the WORK ORDER on the application form for future reference.
- Click VIEW REPORT RESULTS to see the details of the report that have been completed.
- Click REQUEST NEW ORDER to enter another request.
- Click RETURN TO MENU to return to the main EQuest+ screen.

OR TO SUBMIT MANUALLY

10. At the JOB CLASSIFICATION SCREEN - choose the appropriate package/job class and click NEXT.

11. At the ORDER REPORTS screen

- Enter the SUBJECT’S SSN.
- REQUESTED BY should contain your appropriate User ID.
- Admitted to a criminal record, if “Yes” is selected, the entry fields will be brought up on a subsequent screen. Please provide as much detail as the candidate provided to you.
  - Date of Crime (MM/DD/YYYY)
  - Arresting Agency / Jurisdiction
  - State
  - Description of Charge
- SPECIAL INSTRUCTIONS.
  - If we are searching a criminal history in Puerto Rico, please provide the applicant’s mother’s maiden name here.
- Click on + before SCREENING SERVICES to choose the products you will need for this applicant.
- Click NEXT - if the subject’s SSN is either invalid or on the Death Master Index - you will be brought to an error message screen, and you can continue if you choose to do so.
- If you see SSN validation error, verify the number with the applicant; if the applicant indicates that is their correct number, do NOT complete the order for the background report. Instead...
  - Direct applicant to the local Social Security Administration (SSA) office to get confirmation the number provided is their number – have applicant return with written confirmation of their number from the SSA.
  - When the applicant returns with written confirmation, order the background.
If you enter a social security number that has been previously entered within the last 400 days, you will be prompted you are attempting to order a duplicate. If you click “next” you will over-ride the duplicate prompt and incur expenses for an additional background.
  - If you see a duplicate, click on the case number and you will have a copy forward pop-up box display.
  - Click Copy Forward – the screen will disappear and you will be back at the duplicate screen.
  - At the bottom of the screen, you should see a note that indicates “case to copy forward:" and a case number.
  - When you click next the information that was previously keyed in (on the previous case number) will copy forward so that you don’t have to re-key all of the information again.

12. At the IDENTIFICATION INFORMATION screen enter all information requested.
  - At the bottom of the screen, you will see RETRIEVING NAME AND ADDRESS. INFORMATION...CLICK REFRESH TO LOAD AVAILABLE RESULTS. Click REFRESH.
  - Once the NAME AND ADDRESS INFORMATION appears, you may choose any of these that may apply to the applicant regarding their name or date of birth. The information chosen will fill in boxes of information or you may type the FIRST NAME, MIDDLE, LAST NAME.
  - DATE OF BIRTH: mmddyyyy (no slashes - the system will add those automatically)
  - REFERENCE 1 - Open and Available for Your Use
  - REFERENCE 2 - Open and Available for Your Use
  - When ordering an MVR, please provide DRIVERS LICENSE # and State of Issuance.
  - The following states require MVR authorizations to be completed and on file at GIS.
    - PA – must have specific PA authorization completed until PENDOT has you setup electronically.
    - AK – must always have specific AK authorization
    - NH – must always have specific NH authorization
    - WA – the standard authorization the applicant is currently signing is acceptable
    - Once you have completed the data entry for applicants with DL numbers in these states, please record your case number, and fax the authorization to 877-590-4006.
  - Click on ADD. The information will populate below. You may add as many states as necessary.
  - ALSO KNOWN AS (AKA: E.G., ALIAS, MAIDEN) - to be used for criminal history searches. Enter any other names that the applicant may have been known as. Criminal searches will be conducted under each name.
  - Click NEXT.

13. At the ADDRESS INFORMATION screen --- GIS will search each jurisdiction you provide at the level chosen (county, federal, statewide). Please provide and/or select all addresses the applicant has used in the last 7 years.
  - COUNTRY: United States is pre-selected. If another applies, click on the drop down area for selection.
14. At the EMPLOYMENT HISTORY screen (if applicable) enter all information requested below. Please provide all employment history for the last 7 years.

- **EMPLOYER NAME**: enter the same information that is provided on the application form.
- **CONTACT**: check YES or NO as indicated on the application form.
- **EMPLOYMENT DATES**: From - enter beginning date of employment as MMYYYY (no slashes - the system will add those automatically) To - ending date of employment.
- **ADDRESS**: enter the same information that is provided on the application form.
- **CITY, STATE, ZIP**: enter the same information that is provided on the application form.
- **SUPERVISOR’S NAME & TITLE**: enter any information provided on the application form.
- **PHONE**: enter the same information that is provided on the application form.
- **ALTERNATE PHONE**: enter the same information that is provided on the application form.
- **EMPLOYEE ID**: the applicant’s employee ID number, please provide if you have the information.
- **DEPARTMENT ASSIGNED**: the department the applicant was assigned to, please provide if you have the information.
- **COMPANY WEBSITE**: the website of the company the applicant worked for, please provide if you have the information.
- **JOB TITLE**: enter the applicant’s job title that is provided on the application form.
- **PAY RATE**: enter the same information that is provided on the application form (select hour, annual or month).
- **REASON FOR LEAVING**: enter any additional information to be verified or leave blank.
- **COMMENTS**: enter any additional information.
- Click ADD ADDITIONAL EMPLOYER button to add additional employment history.
- Click NEXT to proceed to the next step in the ordering process.
- Once you have completed the data entry for applicants where you are ordering employment, please record your case number, and fax the authorization to 877-590-4006.

15. At the EDUCATION HISTORY screen (if applicable) enter all information requested. Please provide all schools you would like to have the applicant’s attendance and/or graduation verified.

- **EDUCATIONAL INSTITUTION NAME**: enter the information provided on the application.
Instruction Guide

- TYPE: select the level that applies to the institution.
- ATTENDANCE DATES: please enter the date of attendance.
- NAME ATTENDED UNDER: enter FIRST NAME and LAST NAME as it is provided on the application form. The system will default to the primary name as provided during data entry, you may choose to change that name if you know the name under which the applicant attended. If you are unaware of the name the applicant utilized, please leave as it defaults.
- EDUCATIONAL INSTITUTION LOCATION: CITY/STATE: enter the same information that is provided on the application form.
- DEGREE RECEIVED: check YES or NO as indicated on the application form
- COMMENTS: enter any additional information.
- Click ADD ADDITIONAL EDUCATIONAL INSTITUTE button to add additional institute information.
- Click NEXT to proceed to the next step in the ordering process.
- Once you have completed the data entry for applicants where you are ordering education, please record your case number, and fax the authorization to 877-590-4006.

16. At the PROFESSIONAL CREDENTIALS screen (if applicable) enter all information requested:
- TYPE OF CREDENTIAL TO CONFIRM: please select the appropriate credential. If none are applicable, please choose other. Please define which type of credential you would like to have searched in the open text box next to “other.”
- STATE: please select the state in which you would like to have the credential confirmed. If there is more than one state, please click “add additional credentials” at the bottom of the screen and provide the additional information.
- LICENSE NUMBER: please enter the applicant’s license number.
- ADDITIONAL INFORMATION: please enter any additional information regarding this verification.
- Click ADD ADDITIONAL PROFESSIONAL CREDENTIALS button to add an additional credentials.
- Click NEXT to proceed to the next step in the ordering process.

17. At the REFERENCES screen (if applicable) enter all information requested:
- FIRST NAME, MIDDLE, and LAST NAME: please enter the reference’s personal information
- ADDRESS: enter the reference’s address information.
- CITY, STATE, ZIP: enter the reference’s address information.
- RELATIONSHIP: please enter whether it was a business or personal reference - this will direct GIS as to what type of questions to ask the reference.
- KNOWN FOR HOW LONG: please indicate how long the applicant has known the reference.
- HOME PHONE / WORK PHONE: provide the contact number for the reference.
- EMAIL ADDRESS: provide the email address for the reference.
- Click ADD ADDITIONAL REFERENCE button to add an additional reference.
Click NEXT to proceed to the next step in the ordering process.

18. At the ORDER CONFIRMATION screen, review the information on this screen carefully. If changes need to be made to a particular screen click EDIT make the changes and click on RETURN TO CONFIRM. Once you click PROCESS ORDER you cannot go back to correct any information. If an error is detected after you have moved on to the next screen contact your Account Manager for assistance.

- If the applicant’s current address was selected as CA, OK, or MN, there will be a COPY APPLICANT check box on this screen. When selected, this signals GIS to send a copy of the report to the applicant regardless of the outcome.

***Please keep in mind GIS will search criminal records in all of the residential locations you provide under all of the name(s) you provide during data entry. You are charged per jurisdiction, per name.****

19. Once a request has been accepted, you will see ORDER STATUS - Order Successfully Submitted for:

- Record the WORK ORDER on the application form for future reference.
- Click VIEW REPORT RESULTS to see the details of the report that have been completed.
- Click REQUEST NEW ORDER to enter another request.
- Click RETURN TO MENU to return to the main EQQuest+ screen.
- Once you have completed the data entry for applicants where you are ordering employment or education, please record your case number on the authorization form, and fax the authorization form to 877-590-4006.

Prior to the completion of the report you can view the status of the report by following the “To View a Background Report” instructions below.

WORK IN PROGRESS - Saving an Incomplete Order (for processing at a later time)

1. To save while in process
   - At the bottom of each screen, there will be ADD TO INCOMPLETE LIST button.
   - Selecting this option will allow the user to save the information from previous screens up to and including the screen they are currently working on.

2. To return at a later time to the information you previously saved
   - Choose INCOMPLETE ORDERS LIST from the MAIN NAVIGATION.
   - This will bring you to the INCOMPLETE ORDER QUEUE.
   - This list will include only the requests you specifically ordered and saved as incomplete (it will not bring back incomplete requests placed by other users).
TO VIEW A BACKGROUND REPORT

1. Go to website address:

2. At the EQUEST+ MAIN MENU Screen:
   - Enter your USER ID and PASSWORD and click GO.

3. At the NOTIFICATION AND ACCESS SECURITY REQUIREMENTS screen:
   - You will only see this screen one time per day when you first log into E+.
   - Click Agree.

4. At the BULLETIN screen:
   - Will alert you to any potential impacts to your background screening program.
   - Click Next.

5. At the MAIN NAVIGATION menu:
   - Click VIEW Reports.

6. To view a single report, select one of the following criteria:
   - Enter the WORK ORDER, the LAST NAME, or the SSN in the appropriate field.
     - Last Name will pull any background ordered within the last 30 days with that name.
     - Work Order and SSN will pull any background ordered with that work order number or with that social security number no matter when it was ordered.
   - Click GO.

7. To view a list of reports, you can sort by:
   - REQUESTED BY - enter User ID or leave blank to view all reports you have access to view.
   - REFERENCE 1 - Open and Available for Your Use
   - REFERENCE 2 - Open and Available for Your Use
   - DATE(S) REQUESTED or DATE(S) COMPLETED - enter date ranges in the appropriate fields.
- VIEW REPORTS PENDING A FINAL DECISION - allows a list to be pulled of all backgrounds that are graded as a Review and need to have a final grade of PASS or FAIL attached to them.

- VIEW REPORTS PENDING A PROGRESSIVE ORDERING DECISION - allows a list to be pulled of all backgrounds that have been suspended and are awaiting a decision of proceeding to the next tier or stopping the background.

- VIEW UNVIEWED COMPLETED BACKGROUND REPORTS - allows a list to be pulled of all completed backgrounds that have not yet been viewed.

- REPORT STATUS - select a category from the pull-down menu.

- REPORT DISPOSITION - select a category from the pull-down menu.

- SORT LIST BY - select a category from the pull-down menu.

- Click GO.

- BATCH VIEW PRINT - allows you to print in a batch so that you do not have to go into each case individually to print. This will allow printing for up to 50 cases on 1 screen. If you pull more than 50 cases, please choose the “next” option in the bottom right hand corner of the screen to pull the next 50. Once the backgrounds pull up, please allow the system to fully generate the report(s) prior to clicking the print option.

8. To view details of the report (if you are authorized to do so):

- A list of names matching your criteria will display.

- Click on the name of the candidate whose information you wish to see. You will be able to view the details of the report.

- In the event you see the popup window below, it means the background report completed more than 120 days ago. By clicking Certify and Continue, you are indicating you will NOT take adverse action against the individual without first either speaking with your account manager or ordering a new background report.

![User Certification](image)

Selecting An Action

9. Open Attachments:

- Any paperwork that is supplied to GIS from the applicant (ie W-2s, Paystubs, etc) will be available to be viewed in the E+ system.
10. Hire / No Hire -- How to let GIS know to release the On Hold and contact the current employer (if you are authorized to do so):

- GIS will put the current employer on hold when the employer is marked as current and GIS is asked not to contact. When those two conditions are in place, GIS will mark the current employer as on hold and will not contact until instructed to do so.
- A dialog box will appear, providing the below options.
  - By clicking HIRE you are indicating to GIS to verify the current employer.
  - When DO NOT HIRE is selected, GIS will close the background and will NOT verify the current employer.
- You will only be prompted for the Hire / Do Not Hire option when the background is closed and is graded as a Pass or as Review / Pass.

11. Comments:

- You may make any comments you would like for this report both while the report is on-going and when the report is complete.
- Note these comments are for your reference only. GIS will not review these comments.
- They will not be sent to the applicant in the event of adverse action. However, should this background go to court, the report in its entirety including these comments will be made available.

12. Customer Grade:

- You may change the grade to Pass, Fail, or No Grade
- You will be prompted for comments where you may choose to make a note of the action you took and why. These notes will not be sent to the candidate in the event of adverse action. However, if the background is subpoenaed, the comments you made will be included.
- If GIS is handling the adverse action letters on your company’s behalf:
  - By choosing fail, you are signaling GIS to begin the adverse action process.
  - The packet contains:
    - A copy of their completed background.
    - A summary of their rights under federal law
    - A dispute form to contact GIS.
- If the candidate chooses to dispute the accuracy of the report, please refer the individual to GIS. The contact information is located within the packet of information the candidate received in the mail from GIS.