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Paychex Employee Screening Services

Contents of this guide include:

Paychex Essential Criminal Package FAQ's

Included with your Paychex Employee Screening Essential account are 15 Essential Criminal Package background screens annually. This package was designed to utilize HireRight's Widescreen Plus Criminal search comprised of over 600 million records from all levels of Government. The Widescreen Plus Criminal search is a robust and innovative criminal background check with all potential records found verified at the source for currency, accuracy, and completeness.

Essential Criminal Package includes:

      SSN Validation
- SSN Validation verifies that the social security number was issued by the Social Security Administration and the year and state of issuance are valid while also ensuring the SSN is not on the death master index.

      Widescreen Plus National Criminal search
- Widescreen Plus is a criminal database including over 600 million records from all 50 states. All potential records found are verified to confirm currency, accuracy, and completeness at the source. Direct sources include <u>State Sex Offender Registries</u>, <u>Violent offender registries</u>, <u>County Courts</u>, and many more (see listing below).

"What sources are included within the Widescreen Plus National Criminal search?"
- *<u>Sex Offender Registries (all states included)</u>*
- County courts, State Court Administration Offices
- Federal, State, and Local Incarceration records
- Federal and State Agency Excluded party and Sanctions Lists
- National and International Security records
- Other offender registry records
- Department of Corrections from Federal, State, and Local incarceration sources
- Largest proprietary CRA criminal dataset compiled from previously reported public records (from PRIORS and EDB)
- 130+ National Security Sources (Sanctions, Exclusions, and Watch Lists)
- FCRA-compliant processes to validate matches and eliminate false positives

"What steps are required to setup my account?"
1. **Complete your account registration link**
   - Simply click on the link included in the email or cut and paste the below URL in your browser to begin your online registration:
     https://www.hireright.com/microsite/essentials
2. **Complete additional addendums (if applicable)**
   - Access to specific solutions including Drug Screening, Motor Vehicle Reports, COVID-19 Testing, FBI Fingerprinting, and Compliance Workbench require addendums that must be completed for setup.
   - *Addendums should only be completed once your account has been registered.*
3. **Credentialing Begins**
   - Credentialing is designed to help ensure background reports are used for permissible purposes under the Fair Credit Reporting Act.
   - Credentialing typically takes an average of 5 business days to complete.
4. **Account Setup Complete**
   - You will be notified via email your account is fully setup and ready to order.

"What is Credentialing?"
- The Federal Fair Credit Reporting Act, 15 U.S.C. § 1681 et seq. ("FCRA") regulates HireRight's consumer background reports, including the public record and credit information contained in those reports. In addition to regulating employers' use of HireRight's background reports, the FCRA (and the national credit bureaus from whom HireRight may obtain information) imposes obligations on HireRight to take certain steps prior to providing background reports to customers. These steps are designed to help ensure that background reports are being used for permissible purposes authorized under the FCRA and that consumer information is protected from unauthorized access and use (e.g., identity theft). Accordingly, HireRight will perform a credentialing review of all prospective customers. In some cases, HireRight may be prohibited from servicing certain organizations.
- Behind the scenes credentialing will complete a review of the business including, but not limited to, the sources listed below.
    - Obtain proof of bona fide business documentation (assess legitimacy of company)
    - Obtain publicly listed business phone number
    - Website review
    - Email address review
    - Perform an onsite inspection (for restricted products)
    - Verify Location Type
    - In the event further clarification or documentation is needed the credentialing team will contact you directly to provide support. When working with the credentialing group at HireRight you will be assigned a business case number in the subject of your first email. It is important to reference that specific case number when working with HireRight.

"How can I access my account?"
- Go to www.HireRight.com and use your Company ID, User Name, and Password to login.
- Contact eescreening@paychex.com for assistance.

"I need help placing an order and understanding my screening dashboard."
- Page 4 begins new features and placing an order.
- If you require additional assistance or would like to setup a live training contact eescreening@paychex.com.

"Can additional users be added to my account?"
- Yes, the Super User can add as many backup users as needed. Within Screening Manager select Account Setup followed by Manage Users then add New User in the left-hand menu.

"Where can I find my completed reports?"
- Reports are stored and easily accessible within Screening Manager under Completed Reports.

Account Features

Applicant Center

The Applicant Center provides a transparent way for HireRight to interact with candidates during the employment screening process. It consolidates all communication to the candidate in one place by providing:

- o Email alerts when documentation or signatures are required
- o Online approval forms for easy response
- o Easy upload of documentation
- o Live chat and phone support
- o Customizable accessibility settings

Screening Manager

From the home screen of your account easily access everything from your screening results to multiple help options and training tools. Screening Manager makes it simple to quickly navigate your HireRight account.

Additional Screening Solutions

Within your account all Paychex Employee Screening Service screens are available to add to your order for an additional cost. You also have the ability to add on services such as Drug Screening, MVR Reports, and other specific solutions by contacting eescreening@paychex.com for the applicable setup addendums.

Customizable User Access

You can add as many users to your account as needed. Accounts are setup with one "Super User" who has the access to add on additional Users per company need.

- o Customize user access for specific permissions.
- o Example: You can setup a hiring manager as a backup user who may be able to order reports but not view results.

Integration

Paychex Employee Screening Services accounts can integrate with the Paychex Flex Recruiting and Applicant Tracking system. This integration works directly with the Applicant Tracking System to offer the ability to combine all hiring needs into one workflow.

Let's get familiar with your Account Features

This section will explain each area of the HireRight account home page that you will see once upon logging into your account.

The home page contains six distinct areas:

1. **Search** used to locate Applicants by name, order number, etc.
2. **Orders and Reports** new orders are initiated and the process can be viewed in real-time.
3. **Announcements** from HireRight related to maintenance and service updates.
4. **Menu** to access **Account Setup, Forms & Documents, Help & Training, etc.**
5. **Alerts** sent from HireRight regarding in progress orders.
6. **Recently Viewed Items**
7. **Subscription Information**

Account Features Explained

SEARCH:

To find an order, use search. Search allows you to search requests by: Applicant First Name, Applicant Last Name, Personal ID, and Request ID. Search can be used to find orders that are no longer visible on the Screening Manager dashboard.

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E.g, Joe, Jo%, ab-1234567 🔍

ORDERS AND REPORTS:

The **Orders and Reports** area displays real-time information on orders. Orders are organized by **Status Tabs**, described below.

Click **New Order** to initiate an order. Click the **In Progress** tab to see all requests that have been submitted and are currently in the screening process.

- **Invitations:** View, Resend, or Cancel
- **Not Submitted:** Orders that were initiated but not submitted to HireRight for processing and require requestor to take additional steps for submission
- **In Progress:** Real-time details for submitted orders
- **Completed:** Orders that are completed and available results posted
- **Cancelled:** Cancelled orders

| Screening Manager							
Background & Drug Requests						□ Maximize	⟳ Refresh
New Order	🖨 Print	🗐 Download	🗒 Note	More Options ▾	☐ COVID-19 Affected Only		
All Users	Last 7 days					Refreshed just now	
Invitations	Not Submitted	In Progress	Completed	Cancelled			▾
▶ First Name	Middle Name	Last Name	SSN/National ID	Status	Request Date	Updated Date	COVID-19 Affected

ANNOUNCEMENTS:

The **Announcements** area provides messages such as product enhancement notifications, court or school delays/closures due to a holiday or inclement weather, as well as scheduled account maintenance.
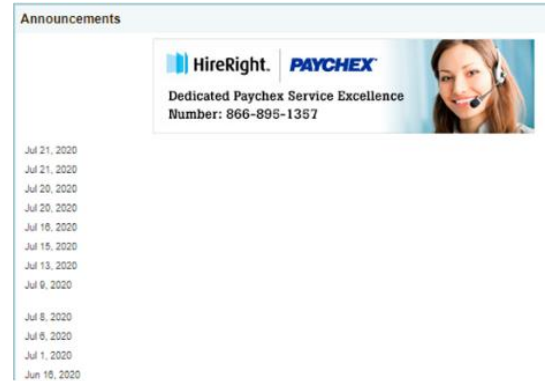
MENU:

The **Menu** provides access to various features, available based on the logged in user's privileges, such as Price List, Management Reports, Account Setup features, Compliance resources, and printable documentation and help resources.

Click on **Help & Training** to access Live Help and other support resources. Click on the **Online Training** icon to access job aids, FAQs, and videos.
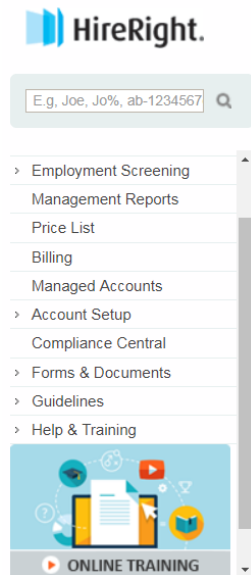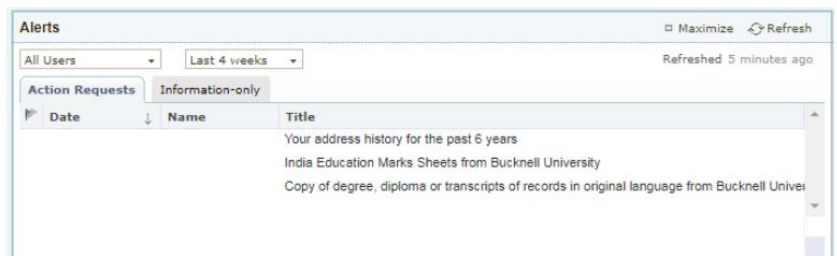
ALERTS:

The **Alerts** portal displays emails that are generated by HireRight to inform of potential delays or additional information requirements for your applicant's screening order.

Alerts fall in to two categories: **Action Requests** and **Information Only**.

Action Requests are typically requests for additional and/or missing information, and require action in order to move forward in the screening process. Double-click on the alert to view the information needed. Information can be entered and/or uploaded to the system.
Information-only alerts are informative only and do not require any action.

SUBSCRIPTION INFORMATION

The Subscription Information box will alert you of Subscription Start and End Dates, Package Setup, Package Allotment, Screens Used, and Screens Remaining.

| Subscription Information	Maximize Refresh
Subscription Start Date	July, 2020
Subscription End Date	June, 2021
Package Selected	Essential Criminal Package
Packages Allotment	15
Packages Used	0
Packages Remaining	15

Placing a New Order

Placing orders just became a lot easier! Under Paychex Employee Screening Services platform orders can now be completed electronically.

1. From the Screening Manager dashboard select **New Order**.
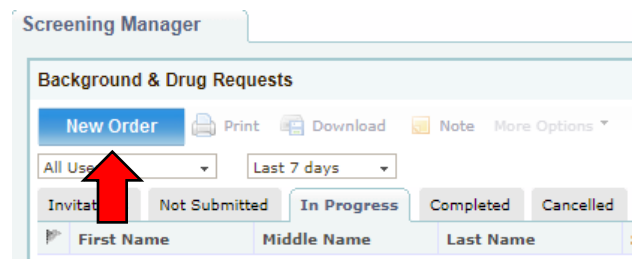
2. If applicable, you will confirm **Job Location** and click **Next** before selecting background check services.
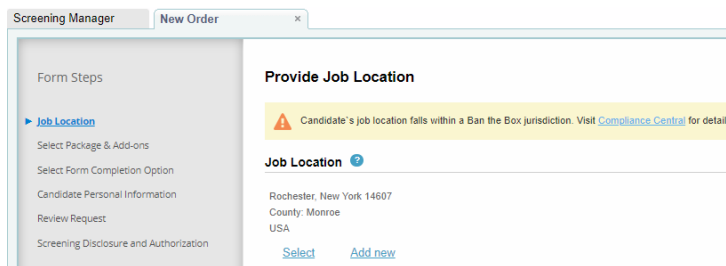
Click **Select** to view job locations and/or to select a different job location

Click **Add New** to add a new job location

3. Your included **Essential Criminal Package** option will auto-default to begin order.

- *Essential Criminal Package* Included

- View Order Details to confirm that these are the services you wish to order.

4. Adding on Services
   - You have the ability to add additional screening solutions to your package.
   - Any screen from the Add-On Services can be used.
     i. You will be charged per screen run outside of the subscription package.
     ii. Example: Essential Criminal Package with an MVR, 5 Panel Drug Test, Education, and Employment Report. You will be charged $54.75 for the Add-On services ordered.

- You can Save "Custom Packages" for future use.

- Please refer to the Price List from the left navigation bar on your HireRight Account for the full list of available Add-On screens and pricing.

5. Who will complete the background form:
   I. Workflow: Will you or the applicant be filling in the applicant data for the order?
   II. Click Next to continue with the selected workflow.

Email applicant information to complete background forms

- Applicant is sent an email they will use containing web address and login information to securely access and provide any additional information necessary for the background check.
  - You may also select Text Message Opt-in which will text the applicant a link to access and securely provide information through their Smartphone.
- Typically, information gathered would include Full Legal Name, Date of Birth, SSN, Current Address, Employment History, Education Attained, Consent and Disclosure forms.

Complete background forms myself

- You are required to enter all information necessary on the applicant and gather consent and disclosure forms.

Account Notifications

By default, HireRight typically notifies the order **Requestor** by email, when your order is:
- In Progress
- Action Required
- Delay
- Complete
- Action Required (such as review/adjudicate)
- Applicant Invitation Expired

Additional Notifications and configurations are available. By default, HireRight typically notifies the **Applicant** by phone, email, or text, when:
- Reminder to complete online form
- In Progress
- Copy of electronically signed Consent, Disclosure, and Authorization
- Action Required

HireRight will only contact your applicant if:
- Your Guidelines allow us to make contact
- If information, documentation, or clarification is needed to proceed with the background check.
  NOTE: The above items are most common but other requirements may arise.

Additional Documentation

Specific solutions within your HireRight account will require additional setup for access.

In order to setup the listed solutions below please complete the additional Addendums.

Drug Testing Services

Complete the Drug and Health Services Order Form by clicking this link. <u>DHS Order Form</u>
Key Terminology:

- **ECOC**- Electronic Chain of Custody eliminates the need for managing paper COCs. Once an order is placed HireRight will manage the entire process of setting up and sending the applicant to a location for drug testing.
- **PCOC**- the Paper Chain of Custody form requires the Super User to order the drug test, select the applicable lab location, and provide the PCOC to the applicant to bring to the selected lab to complete the test.

Motor Vehicle Reports

The General Affidavit of Intended Use is required to be completed for access to order motor vehicle records. The other state specific forms are only required to be completed if you need access to order motor vehicle records in those specific states. Access these forms by selecting this link. <u>MVR Forms for Employment</u>

Access to Credit Reporting/Data

Email eescreening@paychex.com once you have completed your registration if you need access to credit reporting/data. You will be subject to an Onsite Inspection of your office to order & receive Credit data. Please be advised that access to credit products is prohibited for any business operating from either a Residence or Shared Office environment (location that is not under your exclusive control).

Compliance Workbench

Complete the <u>Compliance Workbench Form</u>.

Additional Questions/ Training Options

If you have any questions or would like to setup a live training, please contact our Customer Service team at eescreening@paychex.com or by phone at 585-545-2796, Option 2. Thank you for choosing Paychex Employee Screening Services provided by HireRight.