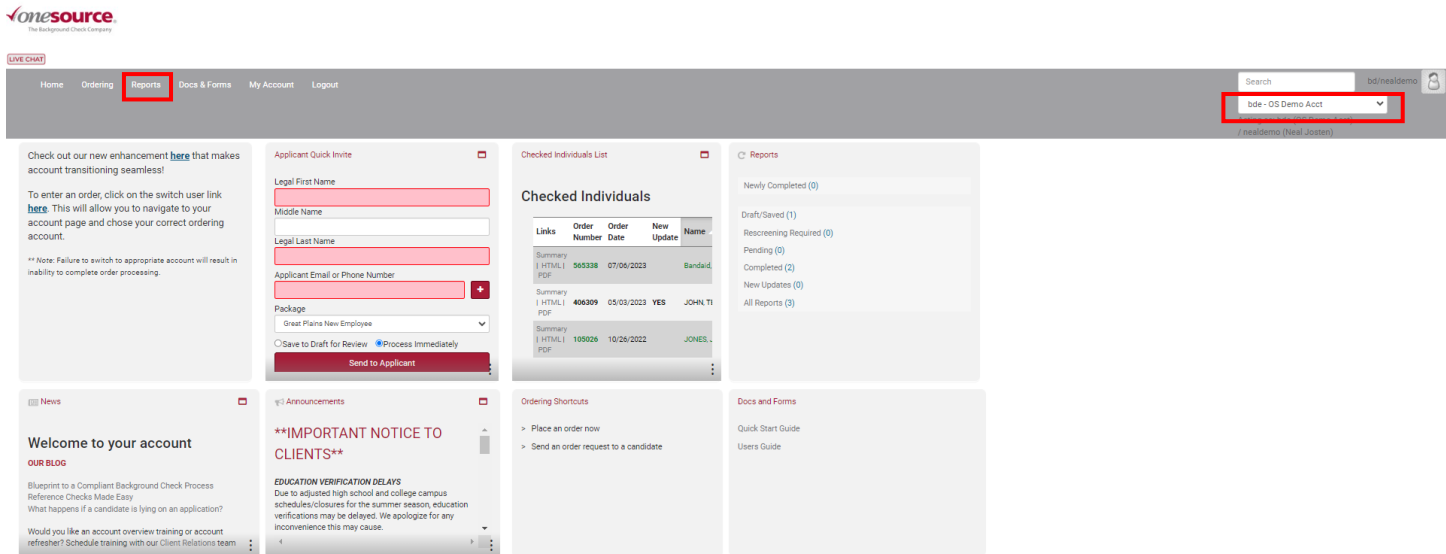


## CREATING YOUR OWN REPORT | CHECKED INDIVIDUALS

This guide is designed to walk you through the process of creating/customizing your own report. If at any time you need assistance with creating your report or have questions as you're doing so, please reach out.

1. Go to the switch user drop-down menu located in the top right-hand corner.
  - a. Select your ordering account
  - b. Click on "Reports" from the top banner and select "Checked Individuals" from the drop-down menu.



- c. Once you are redirected to the "Checked Individuals" page, select the "Filters" option. You can choose from a wide variety of sections to customize:
  - i. Report Status
  - ii. Invitation Status
  - iii. Disposition Color
  - iv. Disposition
  - v. Release form
  - vi. Rescreening
  - vii. Employee Status
  - viii. StayClear Monitor Status
  - ix. Sort by
  - x. Sort Direction
  - xi. Reports to Show
  - xii. Last Name
  - xiii. First Name
  - xiv. SSN
  - xv. Order Number
  - xvi. Range
  - xvii. From Date
  - xviii. To Date
  - xix. Search Type Includes

## Checked Individuals


**Filters** Columns Legend Download CSV Create a Report Manage Reports

Choose a Report: One Source Internal (Non\_OSCC) (shared)

Search Checkbox Key:  Ignore  Include  Exclusively Include (lock)  Exclude (ban)  Auto-correct incompatible checkbox settings

Report Status  Complete  Pending  New Update Only  Unordered (saved/draft)  Reviewed  Archived

Invitation Status  Waiting  Expired  Canceled  Waiting for Recruiter  Expires Today

Disposition Color  Red    Green  Black

Filters  View other accounts  Show Sub-Accounts

Sort by Name

Sort Direction Ascending

Release form

Show reports for

Release form  
Do not filter

Rescreening  
Do not filter

Employee Status  
Do not filter

StayClear Monitor Status  
Do not filter

Sort by Name

Sort Direction Ascending

Reports to Show 1000

Last Name

First Name

SSN

Order Number

Range:

From Date 01/31/2023

To Date 01/31/2023

- d. Once you select the filter options/customization options to your liking, click “Apply Filter Changes”.

Show Report Viewing Options ... Show Billing Filters ... **Apply Filter Changes** Reset Form Update This Report

- e. Next, select “Create a Report”
- Name your new report
  - Click “Save New Report”
  - You will get a Report Saved popup message

## Checked Individuals

Filters Columns Legend Download CSV **Create a Report** Manage Reports [↗](#) Choose a Report: One Source Internal (Non\_OSCC) (shared) ⚙️

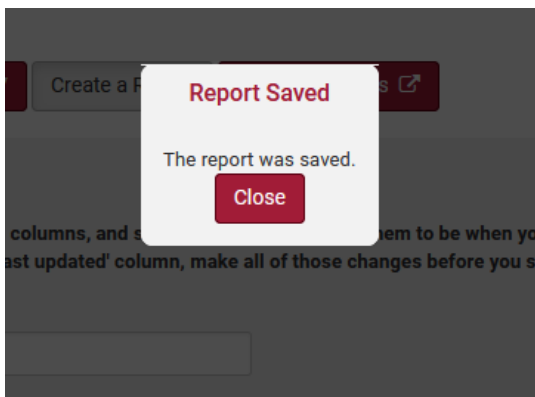
Before saving your new report, make sure the filters, columns, and sorts are all as you intend them to be when you access the new report. For example, if you only wish to see a few columns (name, Status) on the new report, and you wish them to be sorted by the 'Last updated' column, make all of those changes before you save this report. Once you have saved the report, those changes will always appear when you access it.

New Report Name:  
TEST

Save New Report

To save changes you have made to this report, click the 'Update This Report' button.

Update This Report



- f. On the “Checked Individuals” page, you can select your customized report you created from the “Choose a Report” drop-down menu in order to view it.
- g. On the “Checked Individuals” page, you can also select “Manage Reports”, where you can make a report your default, etc.

## Checked Individuals

Filters Columns Legend Download CSV **Create a Report** **Manage Reports** [↗](#) Choose a Report: Checked Individuals - System Default ⚙️

To manage sharing of report filters click here to go to the Shared Checked Individuals Report Filters page.

<input type="checkbox"/>	Move	Default?	Name
<input type="checkbox"/>	11	<input type="radio"/>	ONESOURCE <a href="#">↗</a>
<input type="checkbox"/>	11	<input type="radio"/>	Outstanding Invitations <a href="#">↗</a>
<input type="checkbox"/>	11	<input checked="" type="radio"/>	Checked Individuals - System Default <b>Restore Default View</b>
<input type="checkbox"/>	11	<input type="radio"/>	Manage Outstanding Applicant Invitations <b>Restore Default View</b>
<input type="checkbox"/>	11	<input type="radio"/>	OSCC <a href="#">↗</a>
<input type="checkbox"/>	11	<input type="radio"/>	One Source Internal (Non_OSCC) <a href="#">↗</a>
<input type="checkbox"/>	11	<input type="radio"/>	TEST <b>Share with other accounts</b>
<input type="checkbox"/>	11	<input type="radio"/>	One Source Internal (OSCC) <a href="#">↗</a>