

# ONE SOURCE USER GUIDE

Your all-encompassing guide to getting started with One Source.

Your  
people,  
our  
priority®



# USER GUIDE CONTENTS

Thank you for choosing One Source The  
Background Check Company.

HOW TO  
LOG IN 3

HOW TO  
PLACE AN ORDER 4

HOW TO  
FIND ORDERS/VIEW REPORTS 5

SCREENING  
PROCESS OVERVIEW 6

ONE SOURCE  
FREQUENTLY ASKED QUESTIONS 7

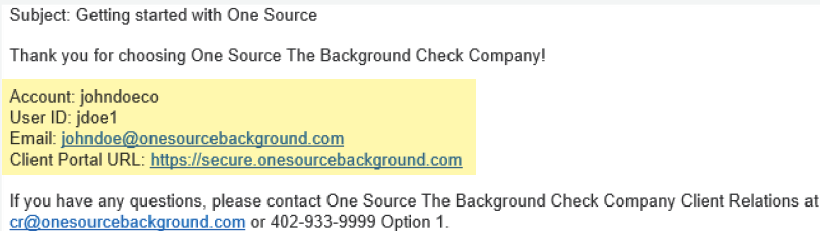
ONE SOURCE  
RESOURCES 8

We're  
here to  
empower  
you.

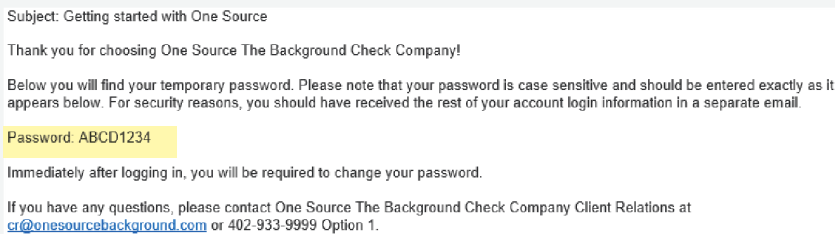
# HOW TO LOG IN

1. To get started, you will receive the following via email:

» A link to our Client Portal along with your Account and User ID



» Your temporary password



Use the Client Portal link to enter your Account, User ID, and temporary password. From here, you will be asked to update your password immediately.

2. After setting up your account password, you will be prompted to implement a two-factor authenticator. Start by entering the user email you have associated with your account into the "Send code to email" section, then click **Request Code**.

Request Authorization Code

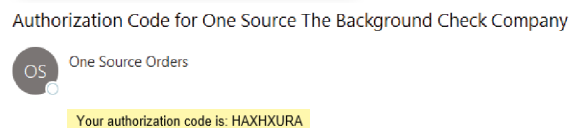
Two factor authentication has been enabled for this account and this device is not authorized for logging in. You will need to provide an authorization code on your login screen in order to authorize this device. We will send an authorization code using your approved communication method after you click the "Request Code" button below.

After you click "Request Code", you will be returned to your login screen where you will be required to re-enter your password and enter the authorization code sent to you. If you do not wish to authorize this device every time you login, check the "Remember This Device" check-box. By checking the box, you are indicating this is not a public computer and it is safe to authorize this device for future logins.

Send code to email:

Request Code

3. Locate the email that holds your *authorization code*.



4. Enter your login information along with the authorization code into the required fields on the *Sign in* page to proceed.

Sign In

Account \*Required\*

User Id \*Required\*

Password \*Required\*

Authorization Code \*Required\*

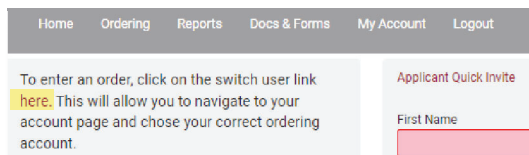
Remember This Device

Sign In

**NOTE:** Use the "Remember This Device" check box to avoid requesting a code each time you sign in.

## HOW TO PLACE AN ORDER

1. After you have logged in, from the *Home* page, you will need to switch users by clicking the **here** link to ensure you place orders under the correct account.

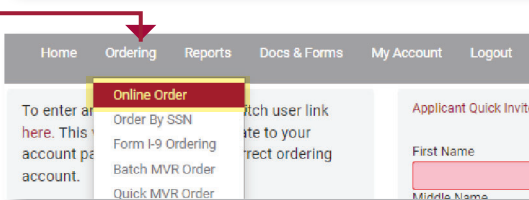


2. There will be an account list at the bottom of the *Switch User* page. The ordering account will always be the parent account name, followed by a series of letters. Select an account.

Or, select an account from this list :

Company name	Account	username	Primary user
One Source	Account	12345	Primary User
One Source	Account 1	12345a	Primary User

3. From the *Home* page, hover over *Ordering* on the top menu bar. From the dropdown, select **Online Order**.



4. Under the *Packages and Products* panel, use the "Choose a package" dropdown arrow to select your package.

Choose a package:

TotalCheck Plus ▼

5. Complete the *Applicant* information section.

**NOTE:** Be sure to fill in all required fields (highlighted in red). If a required field isn't properly entered, a red caution symbol will alert you where error(s) are located.



4. At the bottom of the page, you will check the "**I have obtained candidate authorization**" checkbox to confirm you have proper authorization.

5. Then, click **Save as Draft (Edit Later)** or **Continue to Next Step (Verify Order)** to proceed with placing the order.

I have obtained candidate authorization.  
[Learn more about the Fair Credit Reporting Act \(FCRA\)](#)

Save as Draft (Edit Later)      Continue to Next Step (Verify Order)

6. A verification screen will show indicating which reports you ordered. If the information is correct, click **Submit Now**, and a confirmation screen will appear. If any information is incorrect, click **Go Back** to correct the data and resubmit.

Please review the details of your order below.

Save report for later

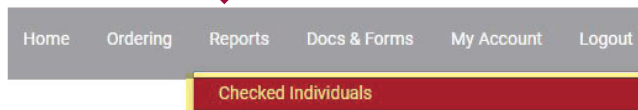
Go Back

Submit Now

# HOW TO FIND ORDERS/VIEW REPORTS

## Searching for Applicant Reports

1. To retrieve results, from the *Home* page, hover over the *Reports* tab, then select **Checked Individuals**.



2. From this page, you can review all of your reports, including reports that are:

- Pending
- Under Review
- Complete
- Archived

Checked Individuals

Filters Columns Legend Download CSV Create a Report Manage Reports Choose a Report: Legacy Page 1 of 1, Items 12 << 0 1 >>

Links	Order Number	New Update	Name	Flags	Status	Report Progress	Last Update	ETA	User ID
Summary   HTML   PDF	1		Allen, Timmy		UNDER REVIEW	<div style="width: 100%;"></div>	12/29/2021		
Summary   HTML   PDF	2		Jones, Sarah		UNDER REVIEW	<div style="width: 100%;"></div>	12/30/2021		
Summary   HTML   PDF	94		Lang, Matthew		ARCHIVED	<div style="width: 100%;"></div>	01/17/2022		
Summary   HTML   PDF	95		Marin, Rebecca		PENDING	<div style="width: 100%;"></div>	01/17/2022	01/17/2022	
Summary   HTML   PDF	188		Paxton, Elizabeth		COMPLETE	<div style="width: 100%;"></div>	01/20/2022		
Summary   HTML   PDF	196	YES	Smith, John		PENDING	<div style="width: 100%;"></div>	01/20/2022	01/21/2022	

## Viewing Applicant Results

1. From the *Checked Individuals* panel, an alphabetical listing of the applicant results is displayed. Select the applicant's name to view the results of the report.
2. For additional report viewing options, click the **Filters** button at the top of the screen.



**NOTE:** You can view an estimated time of arrival (ETA) for the report results from the *Checked Individuals* panel.

3. If you choose to download the applicant's report, you can do so by clicking on the **PDF** link to the left of the applicant's name.

Checked Individuals

Filters Columns Legend Download CSV Create a Report Manage Reports Choose a Report: Legacy

Links	Order Number	New Update	Name
Summary   HTML   PDF	1		Allen, Timmy
Summary   HTML   PDF	2		Jones, Sarah
Summary   HTML   PDF	94		Lang, Matthew
Summary   HTML   PDF	95		Marin, Rebecca
Summary   HTML   PDF	188		Paxton, Elizabeth
Summary   HTML   PDF	196	YES	Smith, John

**ADVERSE ACTION:** If you decide to deny employment of an individual or deny an individual benefits because of the information obtained from our report, in part or in whole, you must follow the proper adverse action under the FCRA.

# SCREENING PROCESS OVERVIEW

## Organizations must follow these key steps to obtain a background report on an applicant:

1. Disclose (if applicable) to the applicant that they will be the subject of a background report as part of the onboarding selection/promotion/retention/placement process. Provided is a sample template for the [Applicant Disclosure and Authorization form](#). Consult with a legal consultant regarding form compliance.
2. The organization collects the Disclosure (if applicable) and Authorization form from the applicant. The organization must keep the form on file for at least five years from the date of inquiry OR a minimum of five years from the date of termination. Be sure to read through the [Fair and Accurate Credit Transactions Act](#) (FACTA) Disposal Rules.
3. The organization uses the information to request a consumer report on the applicant from One Source.
4. One Source completes the consumer report and notifies the organization via email from [orders@onesourcebackground.com](mailto:orders@onesourcebackground.com).
5. The organization reviews the completed consumer report and determines if any information will adversely impact employment/placement decisions. If no adverse information impacts results from within the consumer report, the organization will proceed with steps in the onboarding process.

## Steps 6-9 apply if adverse action is necessary

6. If an organization takes adverse action based in whole or part of the information in the consumer report, the organization must:
  - » Send the pre-adverse action letter to the applicant. There is a link on the right hand side of the completed report.
  - » Provide a copy of the consumer report to the applicant.
  - » Provide a copy of the [Summary of Rights Under the FCRA](#).
7. Should the applicant dispute any information in the consumer report, they will need to contact One Source. Then our team will inform the organization of any disputes.
8. One Source reinvestigates any disputed information. If updates are made, the updated report is then sent to the organization and applicant.
9. The organization reviews updated report and makes final onboarding decisions. If the decision is adverse, a notice of the adverse action is sent to the applicant.
10. Use the link on the right hand side of the completed report for the adverse action letter.

# ONE SOURCE

## FREQUENTLY ASKED QUESTIONS

### Do applicants need to sign a release form before conducting a background check?

In order to stay compliant with the Fair Credit Reporting Act and your One Source Client Service Agreement, you must obtain a signed release form from the applicant before ordering your background check.

### How do I correct data entry or a service selection error after submitting an order?

Contact One Source at [800.608.3645](tel:800.608.3645) option 1 or email via [cr@onesourcebackground.com](mailto:cr@onesourcebackground.com) to connect with a member of our Client Relations Team.

### When the Applicant History Trace results show the number as invalid, what should I do?

If the Applicant History Trace results show invalid for the SSN provided by the applicant, first contact One Source to verify the SSN was entered properly. If it was entered correctly, please verify the SSN is accurate with the applicant.

If an applicant has a Social Security card stamped "VALID FOR WORK ONLY WITH DHS AUTHORIZATION" or "VALID FOR WORK ONLY WITH INS AUTHORIZATION," you will need to contact the Social Security Administration as our system is unable to recognize and process these Social Security numbers.

### How do I receive the results of the background reports I have requested?

An HTML embedded link will be emailed to you when your report is completed. That link is password protected. You can also review reports following the [Find Orders/View Reports](#) section in this guide.

### Can I provide applicants a copy of their background check report?

Yes. You can share the results of the report results with the applicant requesting the information by downloading a PDF. The applicant can also contact One Source to request a copy of their report.

### Why does a background check report include dismissed charges?

The Federal Fair Credit Reporting Act states that non-conviction charges from arrests and tickets from some jurisdictions can be reported for up to seven years from the date filed. This information would be considered "Adverse Information" about a consumer and can be reported for seven years from the filing date.

One Source allows our clients to choose whether or not they want non-conviction information. If you receive non-conviction charges on your account and no longer wish to receive them, you can request One Source to update your account. If you do not already receive non-conviction charges on your account, you can request to have One Source update your account.

# ONE SOURCE RESOURCES

✓ **Contact Us-**

Phone: 800.608.3645

Live Chat: Found in our Client Portal

**For account support:**

[cr@onesourcebackground.com](mailto:cr@onesourcebackground.com)

**For applicant inquiries:**

[orders@onesourcebackground.com](mailto:orders@onesourcebackground.com)

**For billing and invoicing questions:**

[accounting@onesourcebackground.com](mailto:accounting@onesourcebackground.com)

- ✓ **Our Blog-** Review relevant HR and background screening topics, along with One Source news to keep you in the loop.
- ✓ **Newsletter-** Look out for our quarterly newsletter (The Source), where you can read up on our trending topics along with client updates and reminders.
- ✓ **Webinars-** Join in on our webinar events, offering clients a chance to learn more in-depth about the background screening industry and One Source offerings.
- ✓ **Document Library-** Check out our online library to access important user guides, forms, documents, and state law/legal notices.

Peace of  
mind,  
no matter  
the purpose.

[onesourcebackground.com](http://onesourcebackground.com)