

## Contractor Advantage “How-To” Guide

For your convenience, below are “How-To” reference instructions for using the Contractor Advantage system. These instructions detail steps to follow when performing the key activities which include:

- [LogintoContractor Advantage](#)
- [SearchforaPerson/Employee](#)
- [AddaPerson/Employee](#)
- [Order a Screen](#)
- [View Status of a Screen](#)

### **Help**

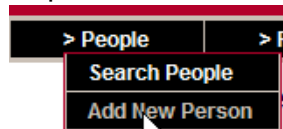
For help with password, site access, or screening components, please contact First Advantage Customer Support at (866) 237-2135.

### **Login to Contractor Advantage**

1. Access the Contractor Advantage System on the Internet with the URL provided. You may want to bookmark the URL in your browser. Make sure that it is entered exactly as provided - all lowercase letters should be entered lowercase, all capital letters entered as capitals.
2. Login using your User ID and Password – enter them exactly as they were setup (uppercase and lowercase must be entered correctly).
3. On your first login to the system, you will be presented a Legal Agreement. Read this information carefully. If you accept, click on “Accept Legal Agreement” button to proceed. You will not see this Legal Agreement going forward.
4. Next, you will see the Fair Credit Reporting Act (FCRA) certification screen. Read this information carefully. Contractor Advantage is fully FCRA-compliant. If you accept, click the “Accept FCRA Agreement” button to proceed. This acceptance will be required each time you log into the system.
5. You will now be at the home page for Contractor Advantage. After login, you may perform various tasks such as:
  - [AddaPerson/Employee](#)
  - [Order a Screen](#)
  - [SearchforaPerson/Employee](#)
  - [View Status of a Screen](#)

## Add a Person / Employee

1. Mouse over "> People" to drop down the menu. Select Add New Person.



2. On the Person Information screen, enter the person's information using the table below as a reference. Required fields are noted with asterisks. When complete, click "Save".

* First Name	<input type="text"/>
Middle Name	<input type="text"/>
* Last Name	<input type="text"/>
Suffix Name	<input type="text"/>
* SSN	<input type="text"/> (Numbers Only, Tax ID's will not be accepted - SSN only)
* Date of Birth	<input type="text"/> (mm/dd/yyyy)
* Type	Select: <input type="button" value="v"/>
User Field 1	<input type="text"/>
User Field 2	<input type="text"/>
<b>Current Address</b>	
* Country	United States of America <input type="button" value="v"/>
* Address 1	<input type="text"/>
Address 2	<input type="text"/>
* City	<input type="text"/>
* State	Select: <input type="button" value="v"/>
* Zip Code	<input type="text"/> - <input type="text"/>
* Vendor Locations	Select: <input type="button" value="v"/>
<input type="button" value="SAVE"/>	

First, Middle, & Last Name	First and Last Name are required, Middle Name is optional.
SSN	Enter the SSN. Numbers only, no dashes.
Date of Birth	Enter the Date of Birth in the mm/dd/yyyy format.
Type	Select Employee.
User Field 1, User Field 2	Not Required – may be used by some clients
Country, Address 1, Address 2, City, State, Zip	Enter the Person's Address. All fields are required except for Address 2.
Vendor Locations	Select your Location if you have setup more than one location.



Make sure all information entered is correct before pressing Save!  
 Information saved for a person cannot be modified!

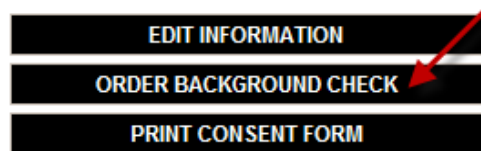
3. Once you save the Person information, the Person is immediately added to the roster. Another person may be added, or you may [Order a Screen](#) on any one in the roster.

## Order a Screen

1. [SearchforaPerson/Employee](#) to select the employee to screen. A Person must be added to the system before a screen may be ordered. If needed, add Person first (see [AddaPerson/Employee](#)).
2. Click the person's name to show the Person Information Page.

<a href="#">Turner, Thomas</a>	In Progress	11122XXXX	Active	06/19/2009		Employee	Corporate
<a href="#">Wagner, Dan</a>	Compliant	31086XXXX	Active	06/18/2008	06/20/2008	Employee	Charlotte

3. On the Person Information page, select the Order Background Check option.



4. The system displays the Background Check Order Detail page on which you will select the desired screening package.

Select a package to view the package details and begin the ordering process:

- ☐ PACKAGE 1  
☐ PACKAGE 2

Please print out the [consent form](#) and have the above individual sign it before continuing to the next step.

☐ I have a signed consent form for this individual on file.

**Next**

**Cancel**

5. MakesureyouhaveassignedconsentformfromthePersonbeforeaBackground Screenisordered, check the consent form confirmation checkbox, then "Next".
6. Depending on the screen packages required, you may be presented additional screens requiring completion.

Previous Convictions	Enter information about any known previous convictions.
Drivers License Number, State Issued	Enter only numbers and letters of the Drivers License (no special characters or dashes). Note the State Issued

7. The system displays the Payment Detail page with options for payment method in the drop-down box.
  - a. In most circumstances, a Credit Card will be used for payment of the screen. Enter the requested Credit Card Information and click "Order".
  - b. In special arrangements, your company may be provided a Promo Code for use from the Sponsor. If so, select 'Promo Code' from the drop-down list, enter the Promo Code given by your Sponsor, and click "Order".

**Please enter your method of payment below:**

Service Name  
 Background Package: \$

Order Total: \$

\* Payment Method Select

Note: If you did not (yet) pass LexisNexis credentialing, you will not be able to see the detailed results.

**Order** **Cancel**



8. The Order Confirmation is shown. You may wish to print the transaction number for future reference. Click "OK".
9. The Background Screen is now being process. Completion of the Screen is primarily based on items included in the screening package. Follow the [View StatusofaScreen](#) directions provided to monitor screening status.

### **Search for a Person / Employee**

1. Mouse over "> People" to drop down the menu. Select Search Person.



2. Search for Persons entering one or many of the desired search criteria - typically a Person's SSN or Last Name is used. Partial search data may also be used. For example, entering 1234 for SSN will return all Persons with 1234 anywhere in their SSN. When search information is entered, click "Search". If no search criteria are entered, the system will display a complete list of all Persons.

First Name:   
 Last Name:   
 Compliance Status:   
 SSN:   
 Person Status:   
 Type:   
 Vendor Locations:   
 User Field 1:   
 Search By Date:   
 From:    
 To:  

**SEARCH**

3. The People Roster page will then be shown with the Persons matching the Search criteria. Compliance Status can also be quickly confirmed as well.

9 people found. Displaying all the people.

Name ↕	Compliance Status ↕	SSN ↕	Person Status ↕	Order Date ↕	Completion Date ↕	User Field 1 ↕	Type ↕	Vendor Location Name ↕
<a href="#">Anderson, May</a>	Non-Compliant	12313XXXX	Active	05/29/2009	06/02/2009		Employee	Corporate
<a href="#">Burlington, James</a>	In Progress	11120XXXX	Active	06/22/2009		MAS drug test	Employee	Corporate
<a href="#">Doe, Jane</a>	In Progress	12345XXXX	Inactive	06/23/2009			Employee	Corporate
<a href="#">Gregorson, Ginny</a>	Non-Compliant	65454XXXX	Active	06/12/2009		test	Employee	Corporate
<a href="#">test_test</a>	Need To Order	11111XXXX	Active			Branch 123	Employee	Corporate
<a href="#">test_test</a>	In Progress	11111XXXX	Active	06/15/2009		USA	Sub-Contractor	Corporate
<a href="#">test_test</a>	Need To Order	11111XXXX	Active				Employee	Corporate
<a href="#">Turner, Thomas</a>	In Progress	11122XXXX	Active	06/19/2009			Employee	Corporate
<a href="#">Wagner, Dan</a>	Compliant	31086XXXX	Active	06/18/2008	06/20/2008		Employee	Charlotte

4. Review the search results, locate the person you were searching for and verify Compliance Status. If the Person is not found, [AddthePerson](#) to the system.
5. The People Roster may be sorted by the fields by clicking the arrows beside each field descriptor. Also, SSNs will be masked for privacy purposes but searches and sorts will be based on full SSN.

Note: A Person must be added to the system before a screen may be ordered.




## View Status of a Screen

1. [SearchforaPerson/Employee](#) to select the Person to view status of screen.
2. On the Person Status Detail Screen, confirm that the Order Status field states Confirmed.



If the Order Status displays Unconfirmed, wait 30 minutes and then repeat Step 1. If Order Status still displays Unconfirmed, contact First Advantage Customer Support at (866) 237-2135.

Order Status	Complete Date	Case Status	Case Score
CONFIRMED	06/20/2008	COMPLETE	<a href="#">Eligible</a>

3. On the same screen, find the Case Score. It may be listed as Eligible, Ineligible, or In Progress.
  - a. If Eligible or Approved, the Person has successfully passed the screening.
  - b. If Ineligible or Not Approved, the Person did not pass or more components of screening.
  - c. If In Progress, the screening is still being completed for the Person.
4. To view further details of the Case Score, click on the “Eligible” or “Ineligible”. If you do not see a link to click under these words, you have not been given permission to view screening details—please contact First Advantage Customer Support at (866) 237-2135 to confirm permission settings.
5. A new window will open showing Search Details and Flags.
  - a. Green Flag  – The Person has successfully completed screening for this component.
  - b. Yellow Flag  – The Person is still being evaluated on the screening levels of this component. Final determination will be made by the Sponsor.
  - c. Red Flag  – The Person did not meet the required screening levels of this component. This component may have a Green Flag or indicate ‘Processing’. Either one of these is OK and will not affect your review.
  - d. Processing – The screening is still in process for this component – check back at a later time.