



# Customer Portal

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*Last Updated: October 8, 2024*

# Contents

- Overview of the Customer Portal..... 1**
- Sign In..... 1**
  - Forgot Password..... 1*
  - Unlock Account A user account is automatically locked after 5 unsuccessful login attempts. To unlock your account, you have two options:..... 2*
  - Updating Password..... 3*
- Navigation ..... 3**
- Dashboard ..... 3**
  - Profile Overview..... 3*
  - Metrics..... 4*
    - Profile Turnaround..... 4
    - Service Turnaround..... 4
    - Hit Ratio..... 4
  - Newsfeed..... 4*
- Profiles..... 5**
  - Create New Profile..... 5*
    - Step 1..... 5
    - Step 2..... 6
    - Step 3..... 6
    - Step 4..... 6
  - Profile List Overview..... 7*
    - Attributes and Statuses..... 7
    - Filtering and Sorting Options ..... 7
    - Profile Actions ..... 8
  - Profile Details..... 8*
    - Candidate Details ..... 9
      - Candidate Overview ..... 9
      - Personal Information ..... 9
      - Position and Roles..... 9
      - Names..... 9
      - Addresses..... 9
      - Settings ..... 9
    - Comments..... 10
    - Documents..... 10
      - Uploading New Documents..... 10
    - Services ..... 10
      - Adding Services..... 10
- Reports ..... 11**
- Invoices ..... 11**
  - Invoices List Overview..... 11*
  - View Invoice ..... 12

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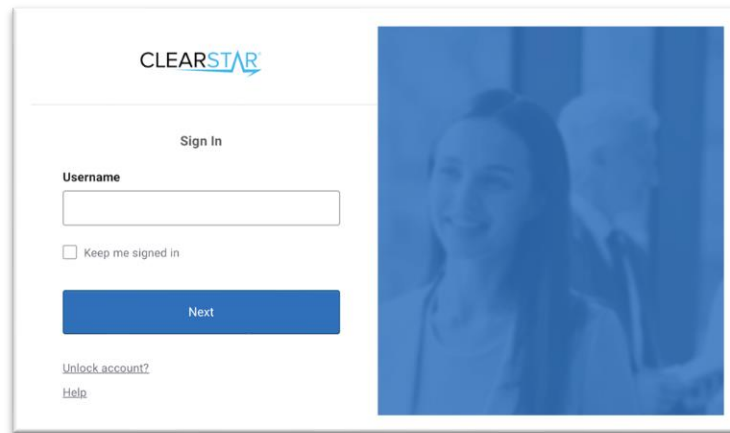
Pay Invoice .....	12
<b>Admin.....</b>	<b>12</b>
<i>User List Overview</i> .....	12
User Details .....	13
.....	14
Add New User .....	14
<i>Customer List Overview</i> .....	14
Customer Details .....	15
Information & Contacts .....	15
Schedules .....	15
Accounting Codes & Positions.....	16

## Overview of the Customer Portal

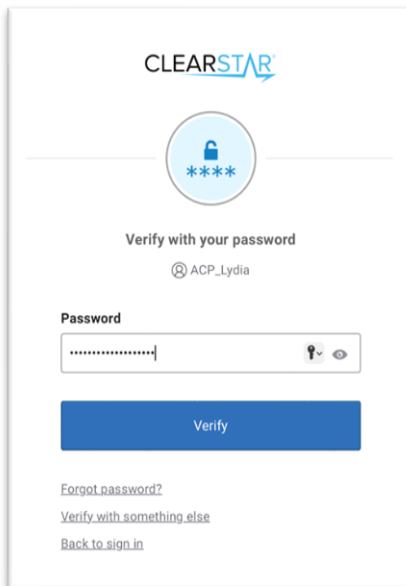
The Customer Portal offers users a centralized platform for all data and functions, enabling users to review, create, and manage background screening requests efficiently.

## Sign In

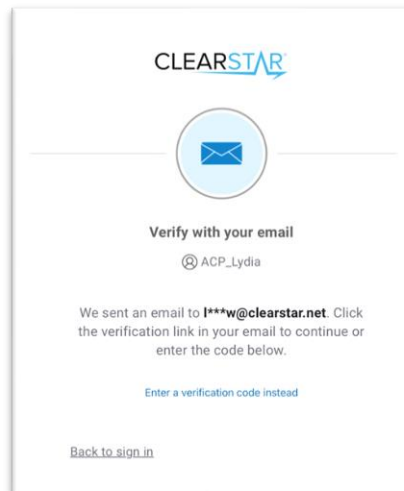
To sign into the Customer Portal, users must have a ClearStar issues account.



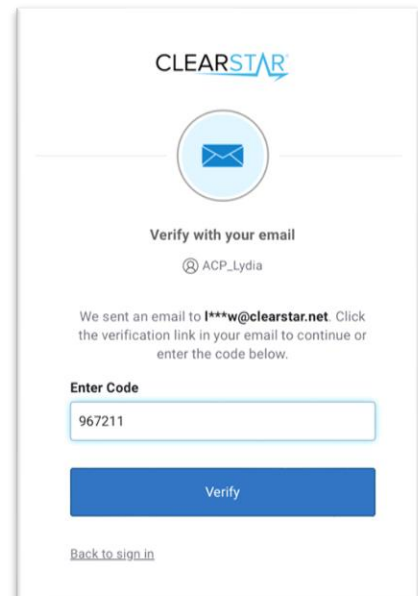
The sign-in screen features the CLEARSTAR logo at the top. Below it is a 'Sign In' heading. A 'Username' label is positioned above a text input field. A checkbox labeled 'Keep me signed in' is located below the input field. A blue 'Next' button is centered below the checkbox. At the bottom left, there are links for 'Unlock account?' and 'Help'. On the right side of the screen, there is a blue-tinted image of a woman smiling.



This screen displays the CLEARSTAR logo and a circular icon with a lock and asterisks. The heading is 'Verify with your password' with 'ACP\_Lydia' below it. A 'Password' label is above a masked password input field with a visibility toggle. A blue 'Verify' button is centered below the input field. At the bottom, there are links for 'Forgot password?', 'Verify with something else', and 'Back to sign in'.



This screen displays the CLEARSTAR logo and a circular icon with an envelope. The heading is 'Verify with your email' with 'ACP\_Lydia' below it. The text reads: 'We sent an email to I\*\*\*w@clearstar.net. Click the verification link in your email to continue or enter the code below.' Below this is a link: 'Enter a verification code instead'. At the bottom, there is a 'Back to sign in' link.



This screen displays the CLEARSTAR logo and a circular icon with an envelope. The heading is 'Verify with your email' with 'ACP\_Lydia' below it. The text reads: 'We sent an email to I\*\*\*w@clearstar.net. Click the verification link in your email to continue or enter the code below.' Below this is an 'Enter Code' label above an input field containing '967211'. A blue 'Verify' button is centered below the input field. At the bottom, there is a 'Back to sign in' link.

**Note:** Two-step verification is required each time a user logs in. By default, email is used as the authentication factor. If the user hasn't set up a phone number, they will be prompted to do so after each verification to use it as a second authentication factor. Users can skip this step by pressing the "Continue" button. Sessions will expire after 12 hours of inactivity, after which users will be prompted to log in again.

## Forgot Password

When forgotten, a password can be reset by simply using the 'Forgot Password' link on the sign in screen. Follow these steps to reset it:

1. Click 'Forgot password' link.
2. Enter the username.
3. Choose the type of authentication.
4. If "email" is selected, provide the address for additional validation.
5. Enter the verification code.
6. Set a new password.

## Unlock Account

A user account is automatically locked after 5 unsuccessful login attempts. To unlock your account, you have two options:

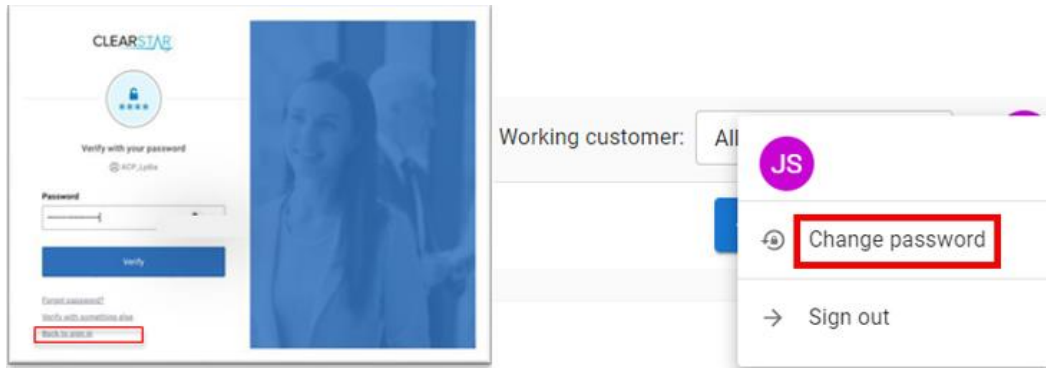
1. **Self-Unlocking (Highly Recommended):** Click the 'Unlock Account' button to unlock using email or phone associated for authentication. Email will be the only available option if a mobile phone number has not been configured on the account.
2. **Contact Administrator:** Send an email to the administrator using the template available when the Administrator email address link is selected.

- When choosing to self-unlock, enter the username and select the authentication factor.

- Next, the user should input the verification code received via email or SMS.
- After verification, the user is required to enter their password. If the user doesn't remember the password, the 'Forgot password' option is available.

## Updating Password

Users have multiple ways to update their password, which can be done either during the sign-in process or while working within the portal. To update during sign-in, simply use the "Forgot Password" option. Alternatively, within the portal, navigate to the user avatar in the top right corner and select "Change Password."



## Navigation

The navigation ribbon on the left side of the screen provides access to the Dashboard, Profiles, Reports, Invoices, and Admin sections. Each of these sections is explained in greater detail throughout the guide.

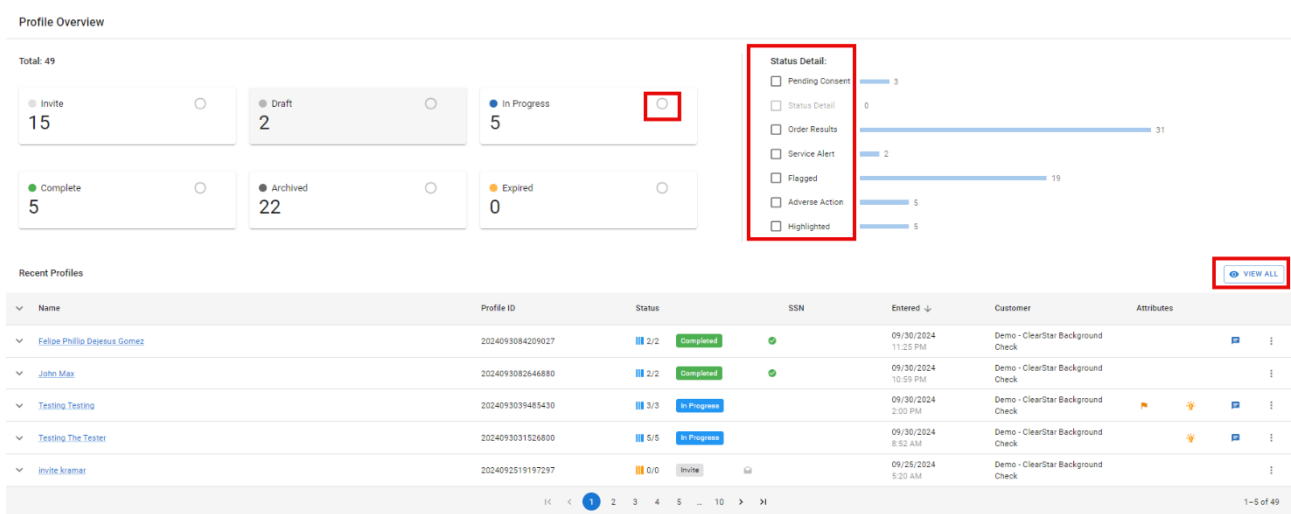
## Dashboard

The Dashboard section is divided into three parts: Profile Overview, Metrics, and News Feed.

### Profile Overview

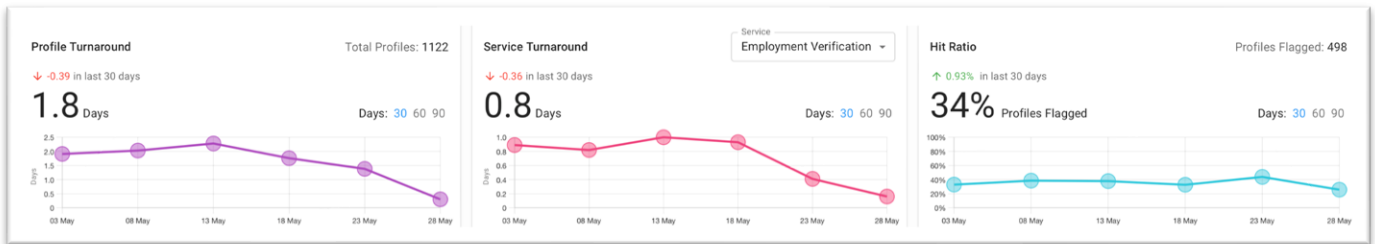
The Profile Overview provides a snapshot of your current profile activity.

- To filter by profile status, select the circle within the status tile.
- On the right-side filter, you can filter by the following status details: Pending Consent, Status Detail, Service Alert, Flagged, Adverse Action, and Highlighted.
- All applied filters will be displayed in the lower section called "Recent Profiles," which consists of the latest 5 profiles. To view more than five profiles, click the "View All" button in the top right corner above the Recent Profile section or navigate to the next page.



## Metrics

Below the Profile Overview, three charts provide additional insights:



### Profile Turnaround

Displays the turnaround time of Profiles. Profile turnaround time is defined as the date the profile was transmitted/submitted for processing by either the user or candidate to the date of completion.

### Service Turnaround

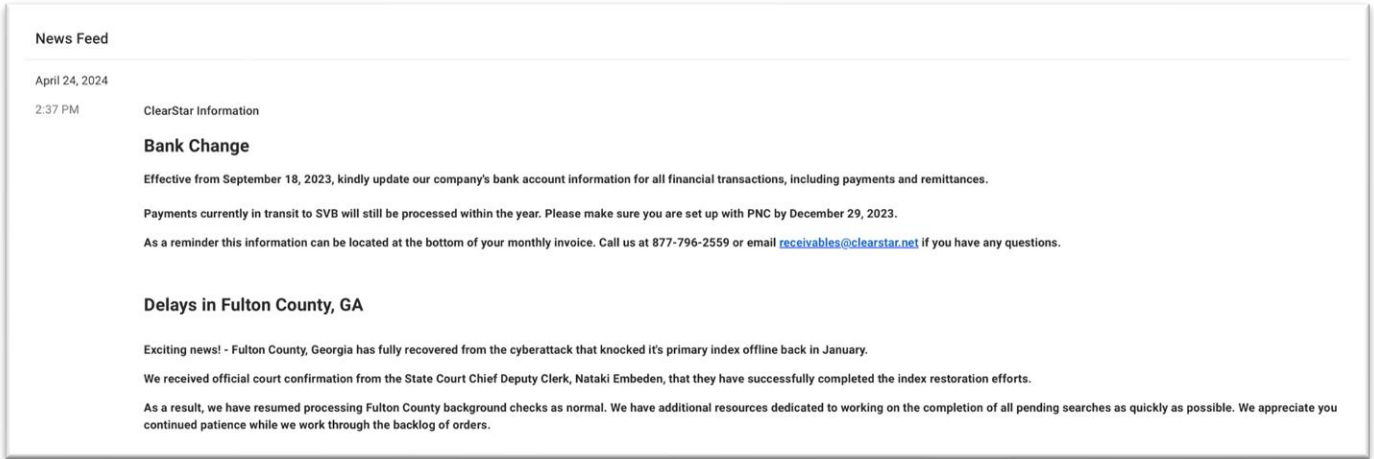
Illustrates the turnaround time for the selected service. Service turnaround time is defined as the date the order was created on an In Progress Profile or the date the Profile was transmitted/submitted for orders that were created and submitted along with the Profile to the date of completion.

### Hit Ratio

Presents the Number of Profiles with Flagged Orders, Total Number of Profiles, and the Percentage of Flagged.

### Newsfeed

The News Feed section contains general information and news updates.



## Profiles

### Create New Profile

To initiate profile creation, select the "Create New Profile" button. This option does not send a candidate invite; instead, it allows the user to create a profile and add services and orders, completing the entire process within the portal.

If the customer account is not specified, the user will be prompted to choose one.

Working customer: All

+ CREATE NEW PROFILE

Choose a customer:

Choose a customer

Demo - ClearStar Background Check

CANCEL + CREATE NEW PROFILE

The profile creation flow consists of 4 steps:

#### Step 1

In this step, the user can input the candidate's First Name, Middle Name, Last Name, Suffix, and any Aliases. The First and Last Name fields are required, while all other field requirements are customer-specific based on the account program.

The "Cancel" button clears all entered data in the fields. The "Continue" button navigates the user to the next step.

## Step 2

Here a user can input the candidate's present address and have the option to include multiple other addresses. For each address, duration lived at the address can be specified and one address as set as the primary residence. Address capture is customer-specific based on the account program.

The first screenshot shows the 'Create New Profile' form at Step 1 - NAME. The progress bar at the top highlights 'STEP 1 - NAME' with a red box. The form contains fields for 'First Name \*' (with 'Jane' entered), 'Middle Name \*', 'Last Name \*', and 'Suffix'. There is an '+ ADD ALIASES' link and 'CANCEL' and 'CONTINUE' buttons at the bottom.

The second screenshot shows the 'Create New Profile' form at Step 2 - ADDRESS. The progress bar at the top highlights 'STEP 2 - ADDRESS' with a red box. The form contains fields for 'Current Address' with sub-fields for 'Address Line 1', 'Address Line 2', 'City', 'State', 'ZIP', 'County', and 'Date From'. There is an '+ ADD OTHER ADDRESSES' link and 'BACK', 'CANCEL', and 'CONTINUE' buttons at the bottom.

## Step 3

This step enables the user to provide personal information about the candidate, as well as details regarding their position and role.

## Step 4

In the final step, the user can select the services and packages. All selected services, along with their calculated amounts, will be displayed on the right side.

The third screenshot shows the 'Create New Profile' form at Step 3 - DETAILS. The progress bar at the top highlights 'STEP 3 - DETAILS' with a red box. The form contains fields for 'Candidate Info' with sub-fields for 'Birth Date \*' (with '03/12/1987' entered), 'SSN', 'Contact Email', 'Phone No.', and 'Gender'. There is a 'VALIDATE' button next to the SSN field and 'CANCEL' and 'CONTINUE' buttons at the bottom.

The fourth screenshot shows the 'Create New Profile' form at Step 4 - SERVICES. The progress bar at the top highlights 'STEP 4 - SERVICES' with a red box. The form contains a search bar for services and packages, and a list of services and packages with checkboxes. The services listed are: 'Default Customer Test Package', 'County Court Criminal Record Search', 'Employment Verification', 'Education Verification', 'Test Package Adam 1', 'Employment Verification', 'Education Verification', 'Test Package Adam 2', 'Professional Credential Verification', 'Professional Reference', and 'Personal Reference'. There is a 'CLEAR SELECTION' button at the bottom.

If you wish to add additional information in previous steps, you can navigate back by clicking on the steps at the top of the panel or by clicking the "Back" button.

To clear all selected services and packages, click the "Clear Selection" button.

Once all information is entered, click the "Create Draft" button.

## Profile List Overview

The profile list overview displays all profiles on the account. The table on the Profile tab includes the following details: Candidate's Name, Profile ID, Status, SSN, Entered Date, Customer, and Attributes.

Name	Profile ID	Status	Entered	Customer	Attributes
Alice Cuellar	2024052149981820	0/2 In Progress	05/21/2024 1:54 PM	Demo - ClearStar Background Check	[Pin] [Message] [More]
Alice Garcia	2024052149068130	1/12 In Progress	05/21/2024 1:39 PM	Demo - ClearStar Background Check	[Pin] [Message] [More]
Johanne St. Louis	2024052148158907	0/2 In Progress	05/21/2024 1:23 PM	Demo - ClearStar Background Check	[Pin] [Message] [More]

## Attributes and Statuses

On the Profile list you can find the following attributes:

Attribute	Attribute Name	Description
	Highlighted	Indicates that the customer has highlighted the profile, which allows the customer to "Pin" the profile.
	Service alert	Internal ClearStar trigger for Quality Assurance.
	Adverse action	Indicates the profile is or has gone through Pre or Adverse Action.
	Flagged	Indicates potentially adverse information within the order or profile.
	Status detail notes	Indicator that there are updates for open orders.
	Order results	Allows customer to view completed order results.
	Documents	Allows customer to view uploaded documents from the candidate and/or ClearStar.

## Filtering and Sorting Options

For additional filtering and sorting options, select the filter icon on the right-hand side of the screen.

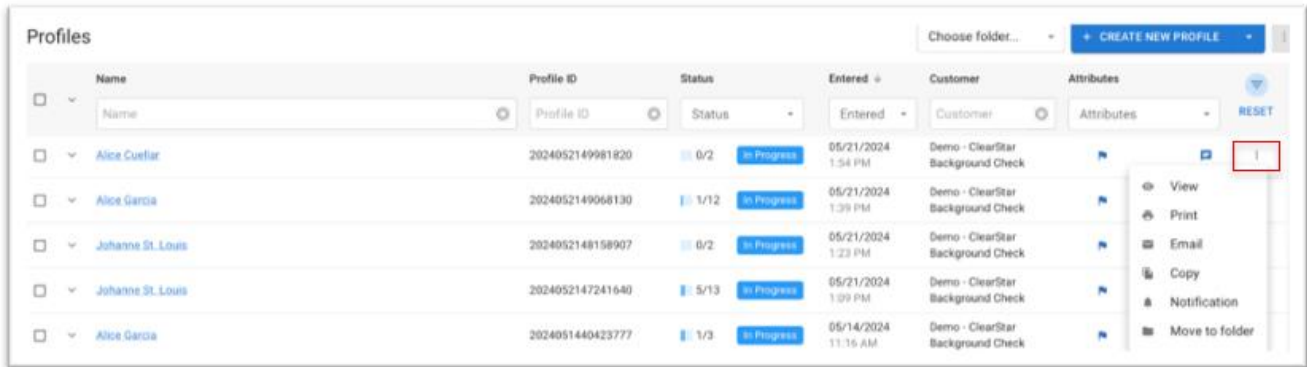
By clicking the filter icon, input fields will appear. Most of these fields can be filtered by "Contains" or "Equals" values, while others will have check box select options.

Name	Profile ID	Status	Entered	Customer	Attributes
Name	Profile ID	Status	Entered	Customer	Attributes
Alice Cuellar	2024052149981820	0/2 In Progress	05/21/2024 1:54 PM	Demo - ClearStar Background Check	[Pin] [Message] [More]
Alice Garcia	2024052149068130	1/12 In Progress	05/21/2024 1:39 PM	Demo - ClearStar Background Check	[Pin] [Message] [More]
Johanne St. Louis	2024052148158907	0/2 In Progress	05/21/2024 1:23 PM	Demo - ClearStar Background Check	[Pin] [Message] [More]

To sort records, click the column heading of your choice. An indicator will appear next to the column heading to show whether the sorting is in ascending or descending order.

## Profile Actions

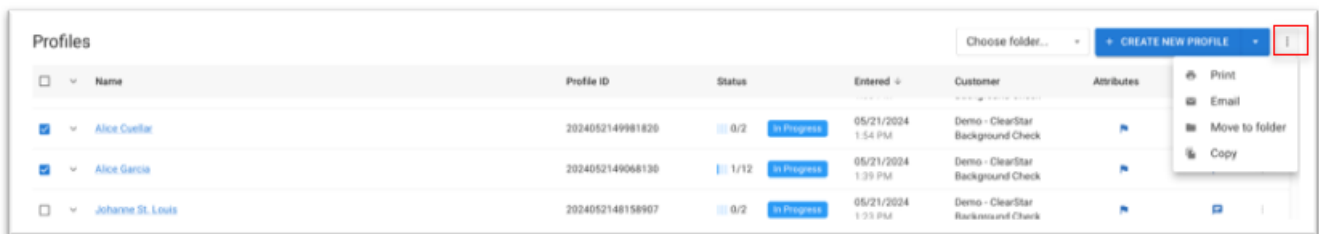
Clicking on the three dots icon next to the profile will display a list of available action items specific to that profile. Available actions will depend on the profile status and applied attributes.



Below you can see what actions are available for a Profile in a specific status:

Action	Available For	Description
Transmit	Invite and Draft	Submits a Profile for processing.
Delete	Invite and Draft	Deletes the Profile.
Print	All	Prints the Profile report to PDF.
Email	All	Provides the ability to email the Profile report.
Move to folder	All	Allows for the Profile to be filed into a folder.
Archive	Completed	Transitions a profile to Archived status.
Copy	Draft, In Progress, Completed, Archived	Allows for the Profile to be copied, partially or in full, to resubmit searches.
Reopen	Completed, Archived	Reopens a profile, allowing for additional services or orders to be added.

Additionally, a user can perform actions on multiple profiles simultaneously. Simply select the profiles using the checkboxes on the left, and then click the three dots icon in the top right corner.



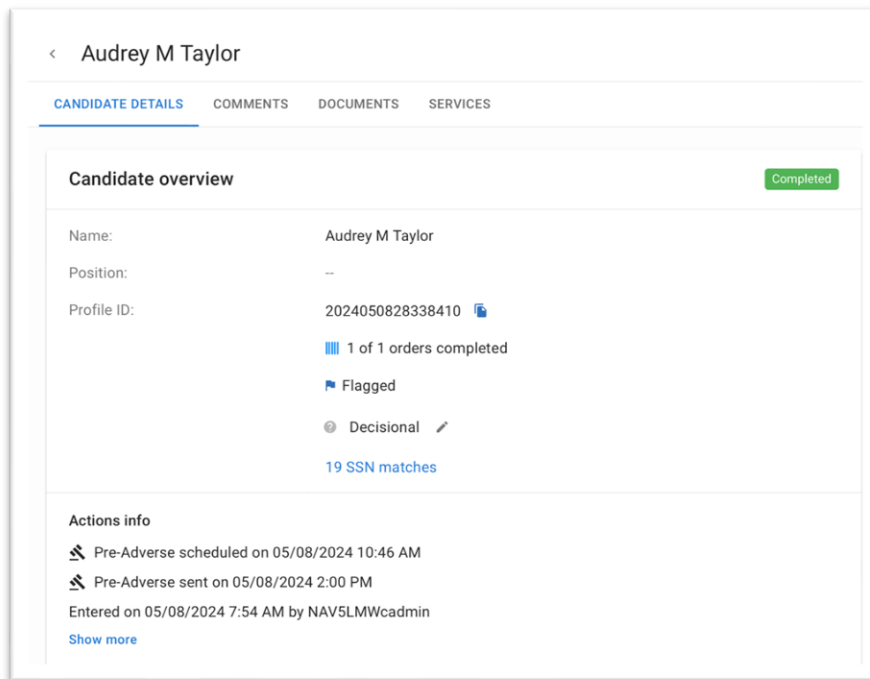
## Profile Details

To open a profile, click on the profile name in the profile list, or select "View" within actions, or use the search field at the top of the page. The profile overview includes four tabs:

- Candidate Details
- Comments
- Documents

- Services

## Candidate Details



### Candidate Overview

The Candidate Overview provides basic applicant and profile information. Adverse action history is also provided here, if applicable.

### Personal Information

The Candidate Details section provides additional information about the applicant, such as SSN and other Personally Identifiable Information (PII).

### Position and Roles

The Position and Roles section will contain information such as Position, Accounting Code, and Job Location. This information can be entered by the user in the portal, by the candidate within candidate engagement, or transferred in via an ATS/HRIS integration.

### Names

Additional names entered by the user, provided by the candidate, or auto populated by ClearStar's automation, obtained from the address history, will appear in this section.

### Addresses

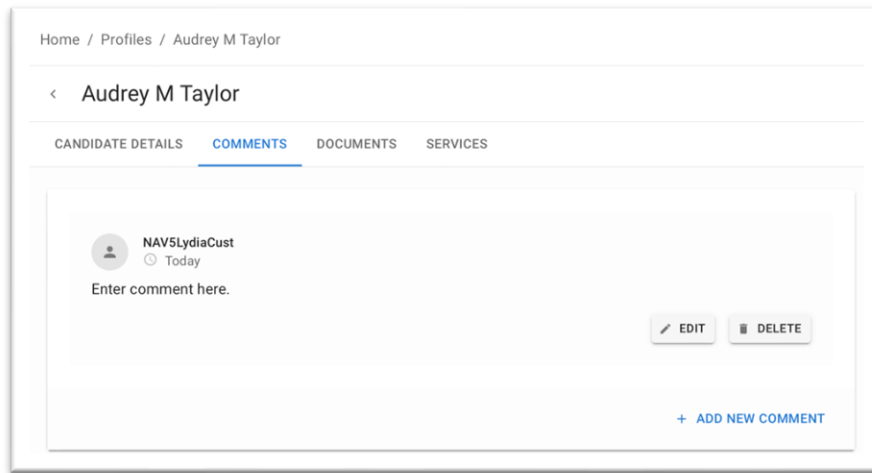
Additional addresses entered by the user, provided by the candidate, or auto populated by ClearStar's automation, obtained from the address history, will appear in this section.

### Settings

Folder and Highlighted designation will appear in this section. Highlighted is a setting that can be applied at the users or account's discretion.

## Comments

The Comments tab displays all comments added to a profile. Comments can be deleted, edited or added.

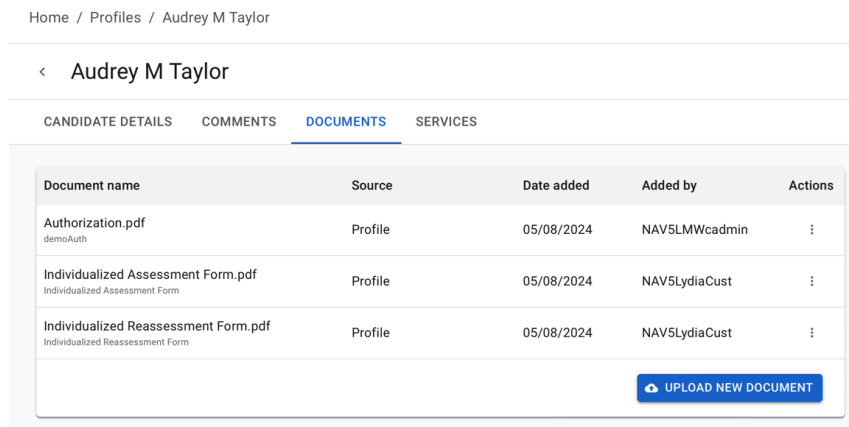


## Documents

In the Documents tab, a user will find all documents uploaded to the profile. Documents can be added, download, managed, and deleted.

### Uploading New Documents

1. Select "Upload New Document"
2. Upload a document and provide a description. Additionally, you can select the order(s) to which the document will be copied.

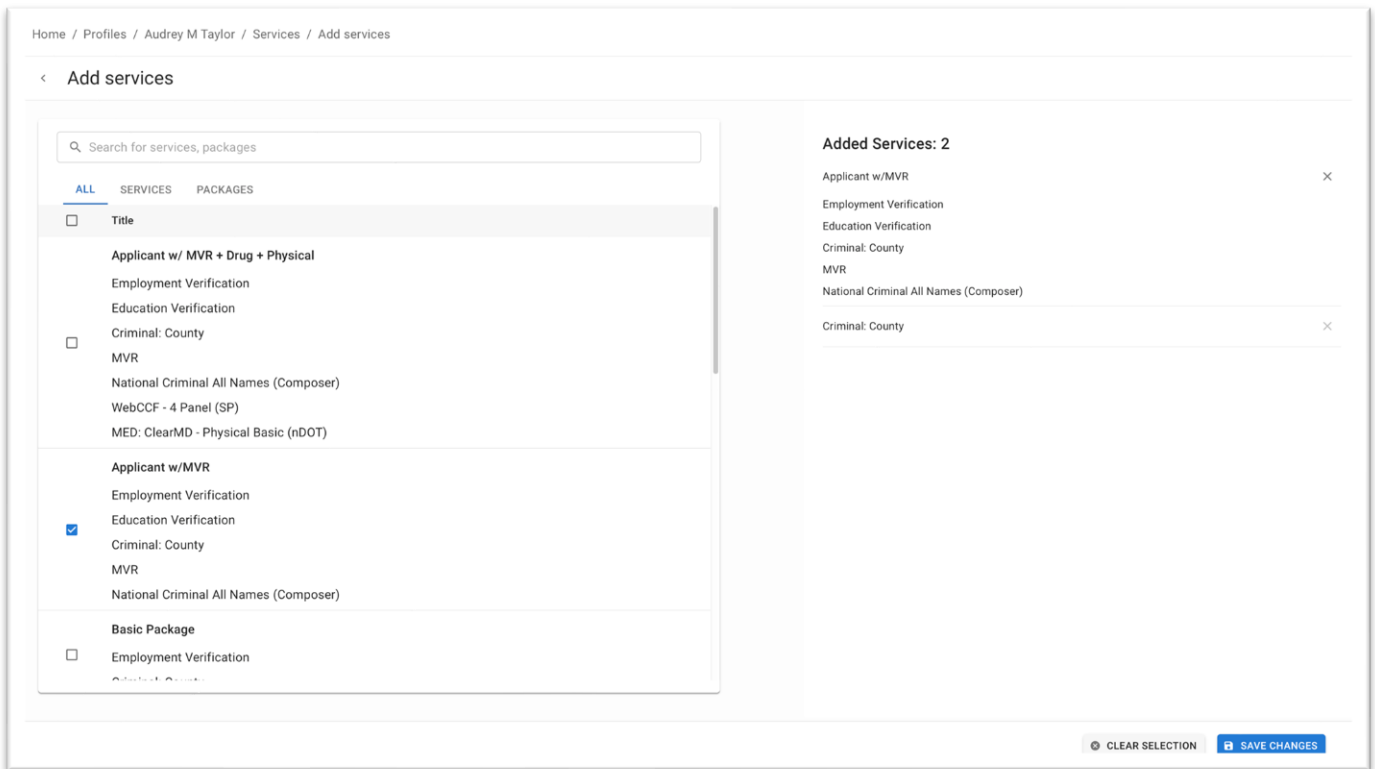


## Services

The Services tab displays all packages, services and orders on the Profile.

### Adding Services

New services or packages can be added to In Progress and Draft profiles, with selected options appearing on the right. New services or packages cannot be added to any Completed or Archived profiles without the profile first being re-opened. Only Admin Users have the ability to re-open a profile, all other users will need to request ClearStar's support team for help.



## Reports

The Reports section provides access to all available reports, which can be rendered on screen or exported in PDF, Excel, or Word formats.

## Invoices

This page will guide you through the Invoice list and all the available actions you can perform there: you will be able to see how to view, pay, and download the Invoice.

### Invoices List Overview

The invoice list overview displays all invoices on the account(s). The table on the Invoice tab includes the following details: Invoice number, Date, Customer, Profiles, Orders, Total, Transactions, and Amount Due.

To the right of the table header, a filter option is available and. Clicking this button opens input fields, allowing for the filtering of every column within the table. Filter fields use the “Contains” search option by default for text fields and “Equal” for numeric fields. The Date column's default value is set to last month.

At the bottom of the list, the total amount for all displayed invoices will appear per the applied filters.

By selecting the three dots menu on the right of each row, the following actions become available:

- View
- Download
- Pay

Invoice #	Date ↓	Customer	Profiles	Orders	Total	Transactions	Amount Due
2005800	05/27/2024	Demo Customer 1	3	4	\$30.00	\$0.00	\$30.00
2005758	05/20/2024	Demo Customer 1	6	6	\$60.00	\$0.00	\$60.00
2005731	05/01/2024	Demo Customer 1	3	11	\$26.00	\$0.00	\$26.00
Totals:		3 Invoice(s):	12	21	\$116.00	\$0.00	\$116.00

## View Invoice

There are two options for viewing an invoice: clicking on the three dots menu or the invoice ID in the invoice list. These actions will open a generated PDF. Once on the view invoice page, the following actions become available:

- Pay the invoice
- Download the invoice
- Navigate to the previous/next invoice based on the list's sorted content
- Return to the list of invoices by using the breadcrumbs or back arrow.

## Pay Invoice

There are two options to pay an invoice: clicking on the three dots menu in the invoice list or click on the "Pay" button on the View Invoice screen.

Select "Continue" to complete all necessary information as in the example below.

Select "Review & Pay."

The "Edit" button allows for the editing of information and to proceed with the payment, select the "Pay" button.

## Admin

This section will guide the user through the User and Customer lists and the available actions for each.

The admin section, available to Customer Admin users only, contains two subsections: Users and Customers.

## User List Overview

The Users table displays list of existing users with the following data columns: Name, Login, Email, Status, Admin.

There are two types of users, designated by the Yes/No in the Admin column:

- Customer Admin
- Customer User

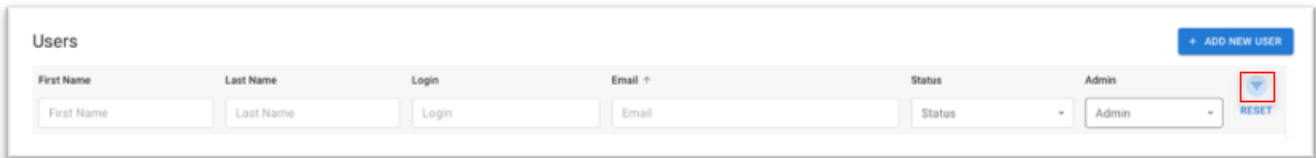
To the right of the table header, a filter option is available. By clicking this option, input fields will open. The first four columns offer input fields for filtering, and the Status column provides a dropdown list with the following statuses:

First Name	Last Name	Login	Email	Status	Admin
Kellie	Flanders	kellief@ckearstar.net		Active	Yes
Krystal	Coney	krystal@ckearstar.net		Invite Expired	Yes
Lydia	Whay	NAV5kuba@cust		Active	Yes
Martin	Mwangi	MMBOUSER		Active	Yes
Martin	Moo2	martinm002		Active	No

- Invited
- Invite Expired
- SuspendedA
- Active
- Locked Out
- Pending

The Admin column allows for the selection of Yes for users with admin rights, No for users without admin rights, or All.

Table content can be sorted by any column. To sort records, click the desired column and an indicator will appear next to the column heading to show whether ascending or descending sorting is active.



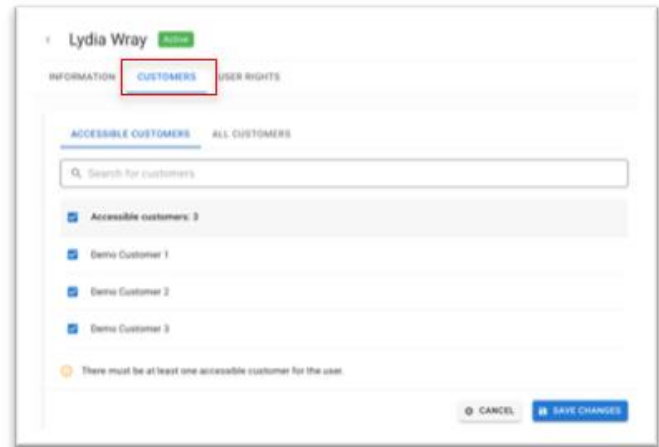
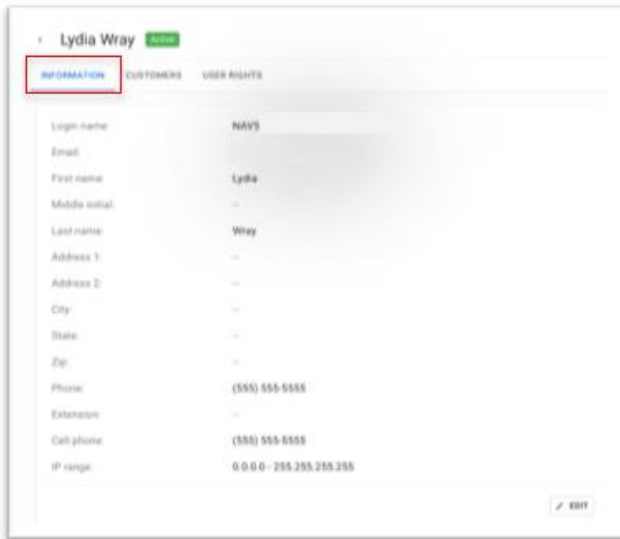
In the bottom left corner, a select is available to choose the number of requests displayed per page.

### User Details

To view User details, click 'View' within the three dots menu. The User Overview consists of three tabs:

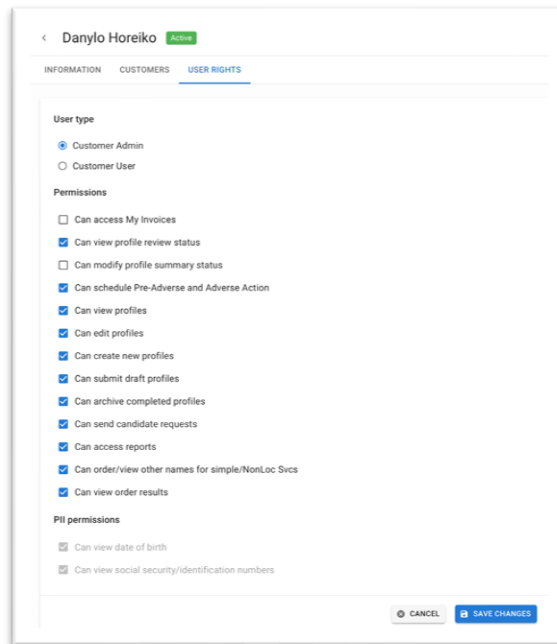
1. Information
2. Customers
3. User Rights

The 'Information' tab contains all user details, including Name, Email, Address, Phone, and IP address range. All fields on this tab are editable. At the bottom of the page, an IP address range, limiting access, can be configured.



On the 'Customers' tab, select the customers that will be accessible to this user. There must be at least one accessible customer for the user, and the admin can only grant equal or lesser access than themselves.

Permissions can be granted or edited on the 'User Rights' tab, and an admin can only grant equal or lesser permission than themselves. Only permissions available to the user type will be enabled.



### Add New User

To create a new user, navigate to the User section and select “Add new user” in the top right corner. Once a user is created, they will receive an invitation email from [connect@clearstar.net](mailto:connect@clearstar.net) containing the details required to sign in.

### Customer List Overview

The Customers table displays a list of accessible customers with the following information: Full Name, Customer ID, Address, and Phone.

Filtering and sorting function the same way as with other lists. When using the filter on this list, all columns offer input fields for filtering.



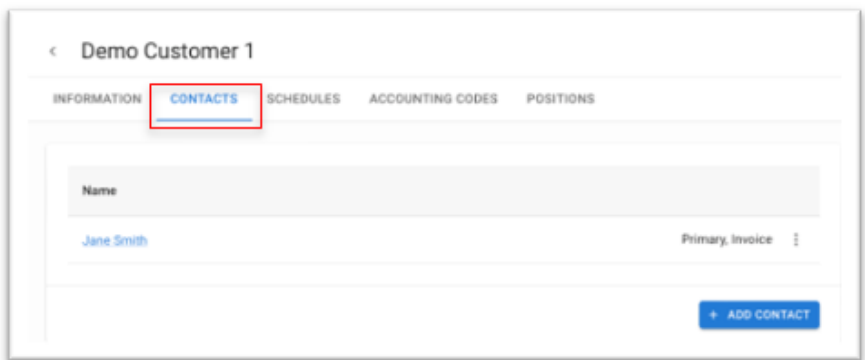
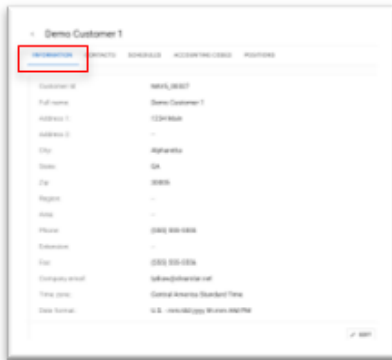
### Customer Details

To view Customer details, click 'View' in the three dots menu. The Customer Overview consists of five tabs:

- 1. Information
- 2. Contacts
- 3. Schedules
- 4. Accounting Codes
- 5. Positions

### Information & Contacts

The Information tab contains all customer details, including Customer Id, Name, Address, and Phone, Company email, Time zone. Limited fields on this tab are editable for compliance purposes.

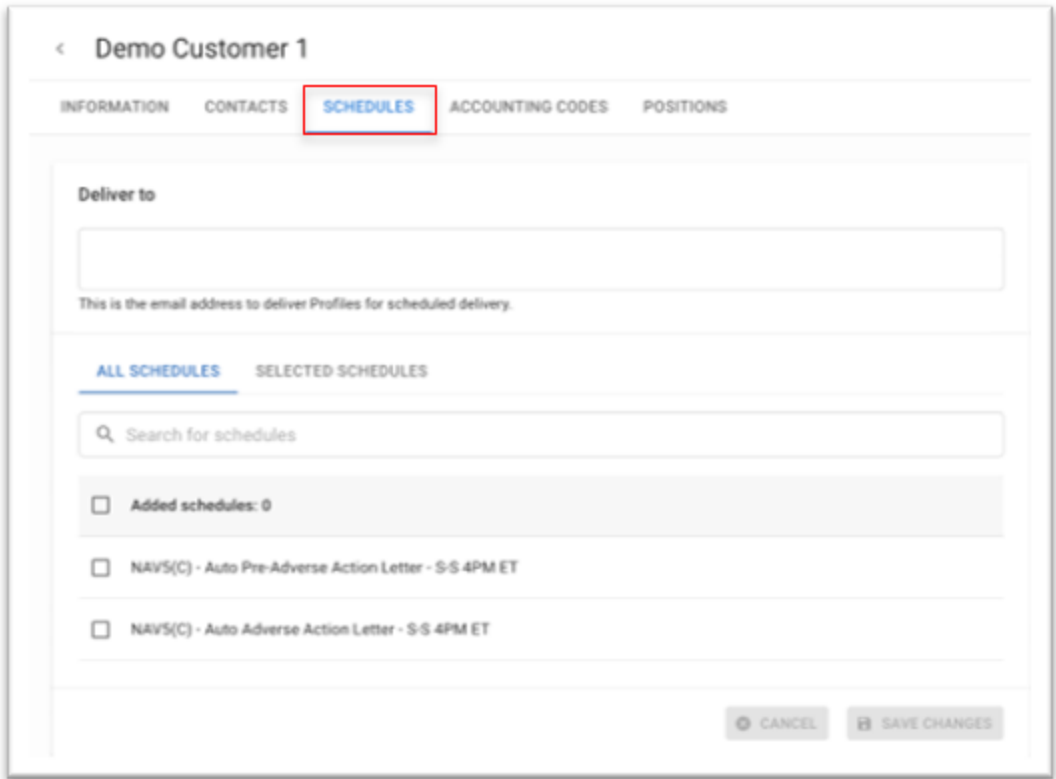


On the Contacts tab a user can add, view, edit or delete contacts.

To edit a contact, enter the 'View' mode, and then click on the 'Edit' button at the bottom right corner of the page. At the lower section of the page, there are options to designate this contact to receive invoices and/or set them as the primary contact. Please note that only one contact can be configured to receive invoices or be designated as the primary contact.

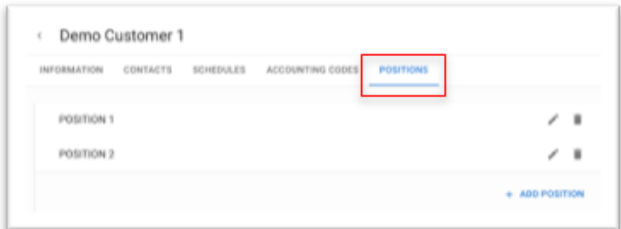
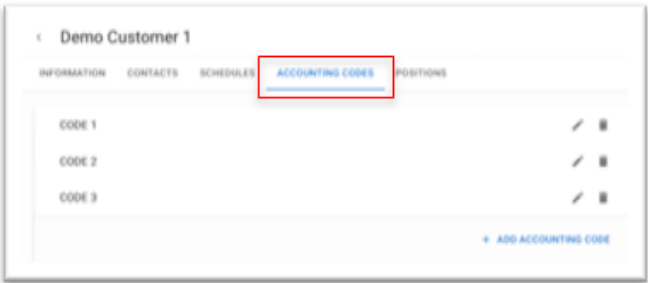
### Schedules

On the Schedule tab, the configured email addresses for receipt scheduled reports will display and can be edited. Additionally, jobs can be added to an account.



### *Accounting Codes & Positions*

On the Accounting Codes tab, an Accounting Code pick list can be configured. The pick lists are applicable to only profiles created within the portal.



On the Positions tab, a Position Code pick list can be configured. The pick lists are applicable to only profiles created within the portal or through candidate engagement, if the candidate is requested to input data in these fields.