VERITY

Verity User's Guide

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About Us

Ministry Mobilizer is Protect My Ministry’s paperless risk management system.

It is best to think of Ministry Mobilizer as a secure filing cabinet for the background checks that you process and the forms you collect. You can use Ministry Mobilizer as a part of your volunteer recruitment process or as an electronic application system, or both, it is up to you.

It is recommended that if you have access to background reports through Ministry Mobilizer, DO NOT save a copy of the background report. It is also recommended that you DO NOT print out the background checks onto paper unless you have a locked filing cabinet to store them. It is recommended that you shred documents that contain any sensitive identity information when the time comes to dispose of the documents. These measures will help reduce the risk of identity theft and information falling into the wrong hands. Protect My Ministry recommends consulting your legal counsel to ensure your compliance with all state and federal laws.

Ministry Mobilizer is secure. Both the login page and online application are protected by DigiCert Authority with 2048-bit encryption. The connection is encrypted using TLS_ECDHE_RSA_WITH_AES_256_GCM_SHA384, with ECDH for message authentication and RSA 2048 as the key exchange mechanism.

Ministry Mobilizer offers an online application and consent form with bundle 2 and higher.

Bundle #s will be displayed, throughout this guide, to indicate availability. [0 1 2 3 4] To view our side-by-side comparison of all available bundles, please see our reference document at the end of this user guide.

Getting Started

Login

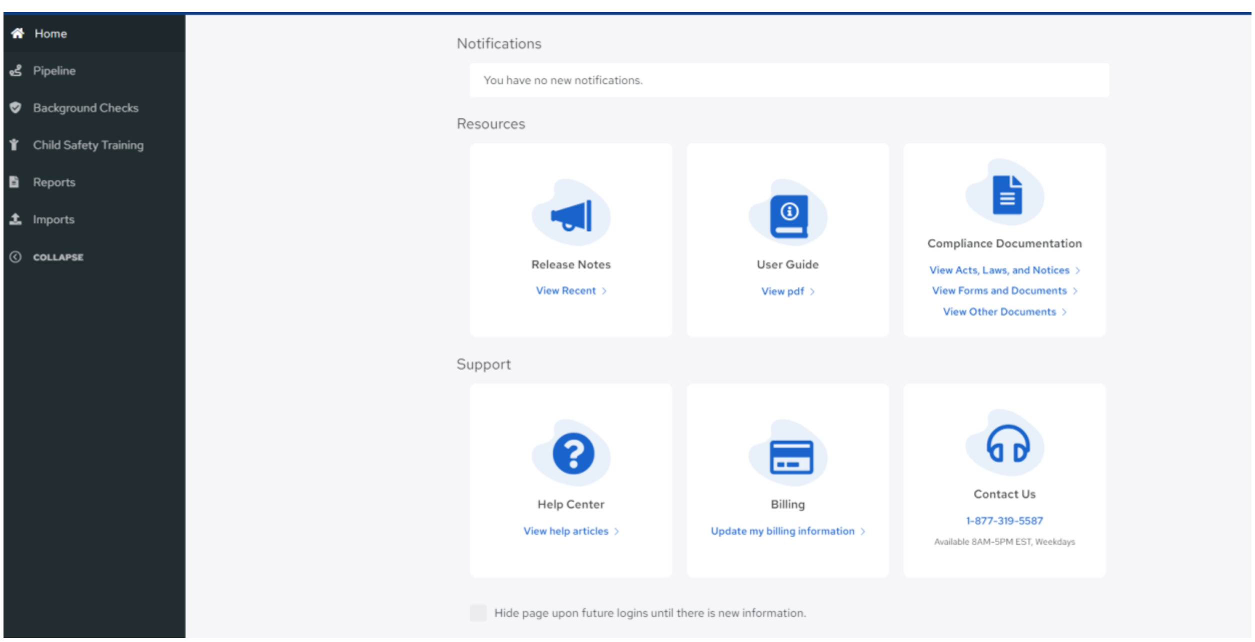
Once your user has been added to your organization's account, you will be sent an email to create the password. The link will only be available for 48 hours. If you find the link has expired, you will need to email support and request a new link be sent to you.

- Your login credentials are case sensitive.
- Passwords must be a minimum of eight (8) characters and must contain each of the following: uppercase letter, lowercase letter, number, and special character.
- If you forget your password at any time, please use the 'Forgot Password' option to reset it. If you forget your username, please contact your account administrator for your organization.

> DO NOT SHARE YOUR LOG IN CREDENTIALS WITH OTHERS IN YOUR ORGANIZATION. EACH USER MUST HAVE THEIR OWN USERNAME AND PASSWORD.

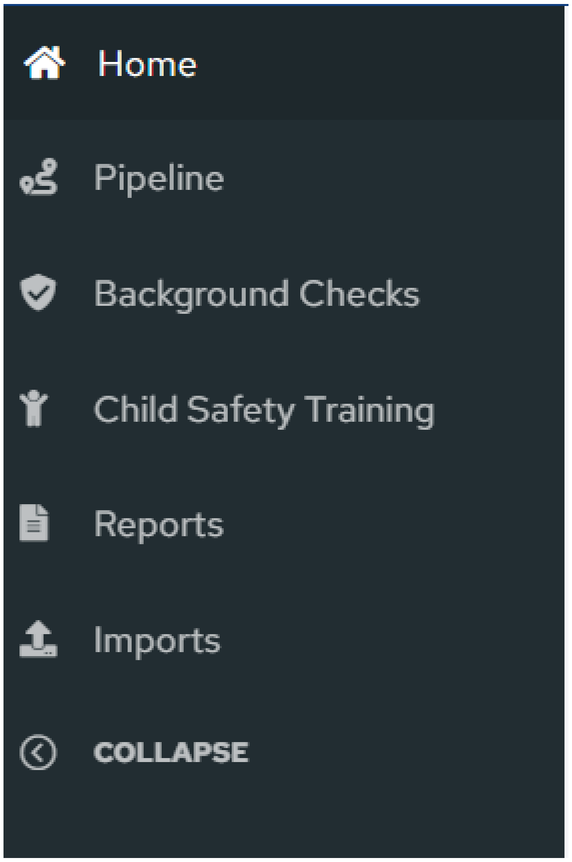
Go to: https://www.ministrymobilizer.com/login/Account/Login

New Home Page



Menu

New: Simplified menus with better navigation



The Menu Options shown will be enabled based on bundle type. Bundle #s will be displayed, throughout this guide, to indicate availability. [0 1 2 3 4]

To view our side-by-side comparison of all available bundles, please see our reference document at the end of this user guide.

The Home Page has all announcements and information regarding system updates, office hours, compliance updates, training manuals, links and resources pertaining to background checks and notes for your account.

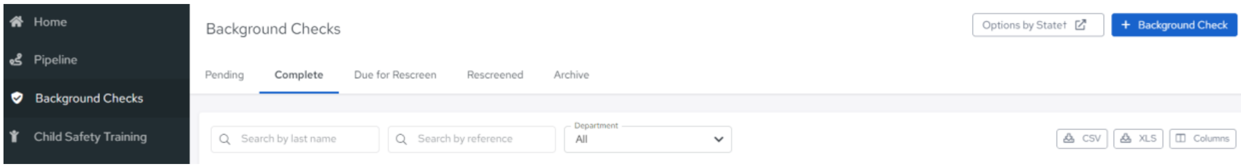
****Note: Only Bundles 2 and have access to the Pipeline where they can manage All applicants in their account (send online forms, order reports, order training and add applicants to their account without ordering). See Pipeline section for more information.**

Background Checks [0 1 2 3 4]

New: you can hide columns on your background check pages-simply click the "Columns" button and uncheck the columns you do not need to see on your view. This is set by a cookie so if you clear cache/cookies from your browser, your selection will be lost, and you will need to set it again.

Main Menu>Background Checks>+ Background Check for new applicants (all bundles) OR **Main Menu>Pipeline>+ Order>Background Check** (bundles 2 and higher)

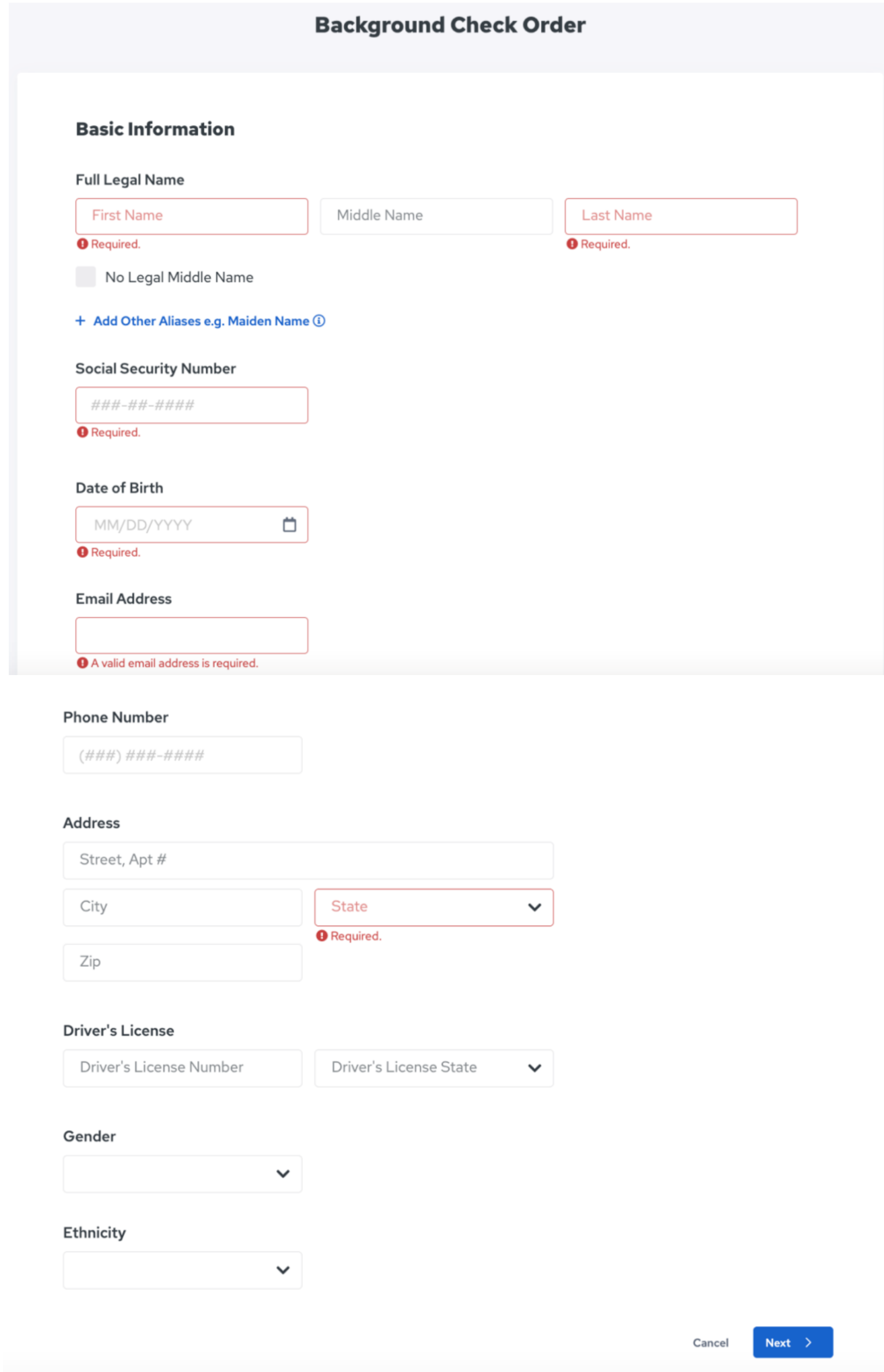
New: blue + Background Check button in upper right-hand corner makes it easier to start a background check at any time. Our state options map is also easily accessible.



- Our Background Check page will indicate fields required to order a background check with an asterisk. The accuracy of your final report depends on the accuracy of the information submitted. While not yet required, we do recommend a complete mailing address for all applicants.
- If you need a court search (Plus package), you will need to know the state and/or county to search. **each county and/or state searched has an additional search fee PLUS any mandatory fees for that location** The fees displayed only represent the mandatory court fees and not the search fees themselves.
- If you would like an online consultation in selecting the right screening package for your organization, please email support@protectyouthsports.com for Protect Youth Sports customers or support@activescreening.com for Active Screening Customers
- If your organization uses billing references, please select one for your order (we will subtotal your invoices using these billing references for your convenience)
- If you select a search that has a specific requirement (such as a consent form is required with a GA statewide search) a pop-up window will remind you to supply the information.

** Credit Checks require complete mailing address

**MVRs require driver's license and state.



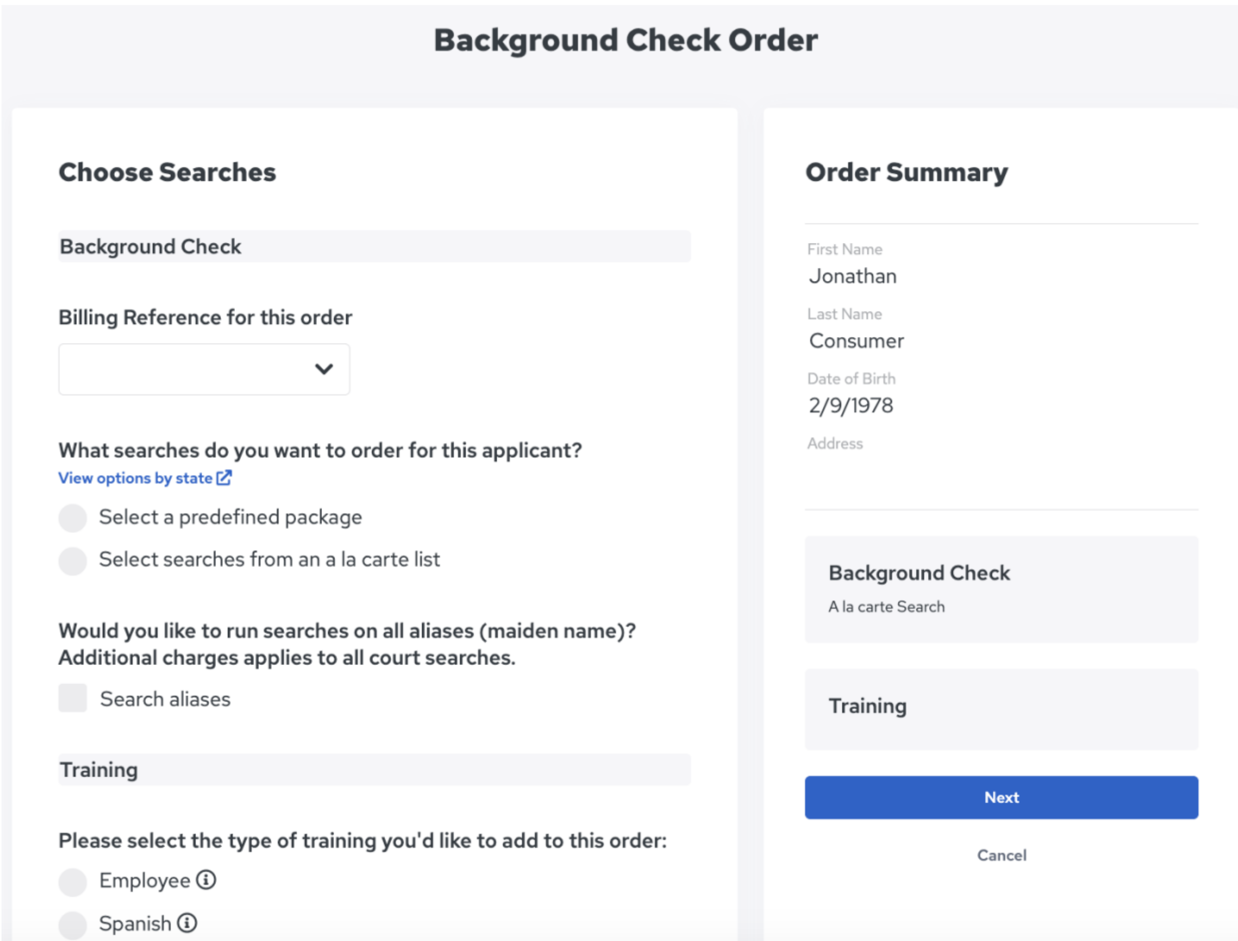
Once you click ‘Next,’ you will be taken to the menu to order your package or group of services.

New: our menu appearance has changed. Packages are separate from a la carte and an order summary will appear on the right.

A la carte services can be ordered by selecting a la carte and then selecting the individual services.

To also search the alias name(s), check the box but note additional charges apply.

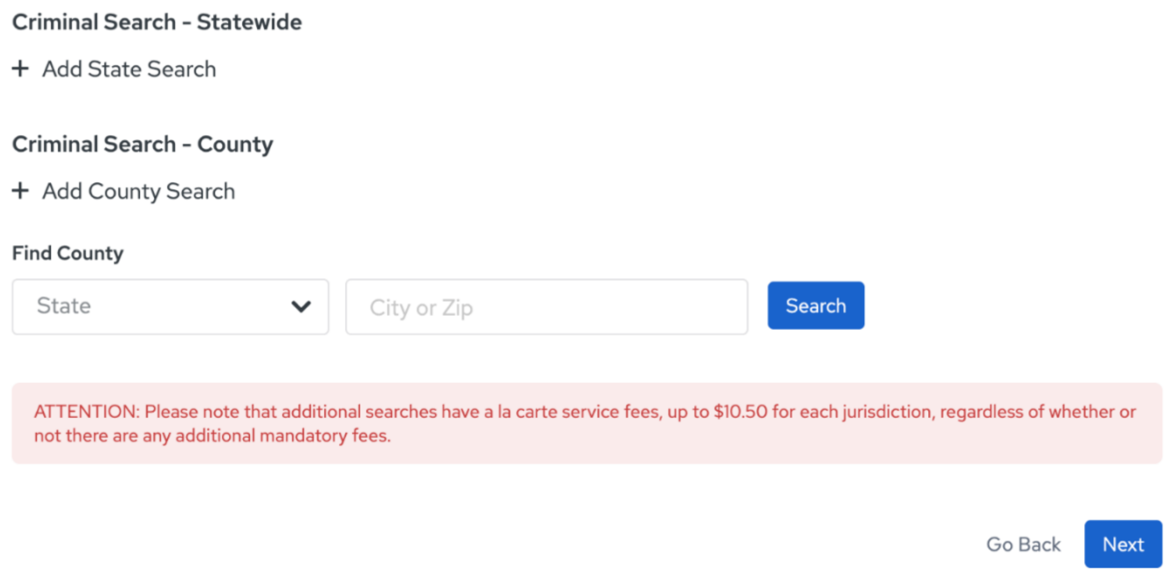
To add training to your order (bundles 1 and higher), select a type of training.



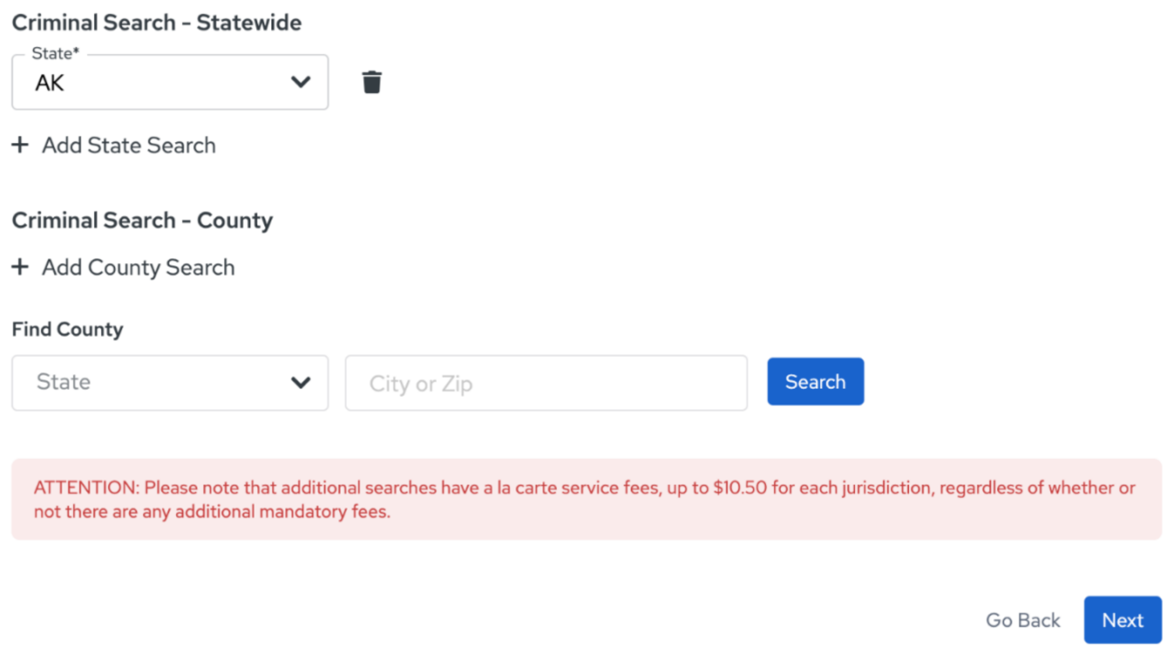
If you are ordering a Plus package or any search that requires jurisdiction, you will be prompted to add the locations.

The system will recommend a state or county based on the address submitted for the applicant. If you will be ordering county searches, provide both state and zip code in the applicant address so the system can recommend the county. Complete address is always recommended for any applicant, however.

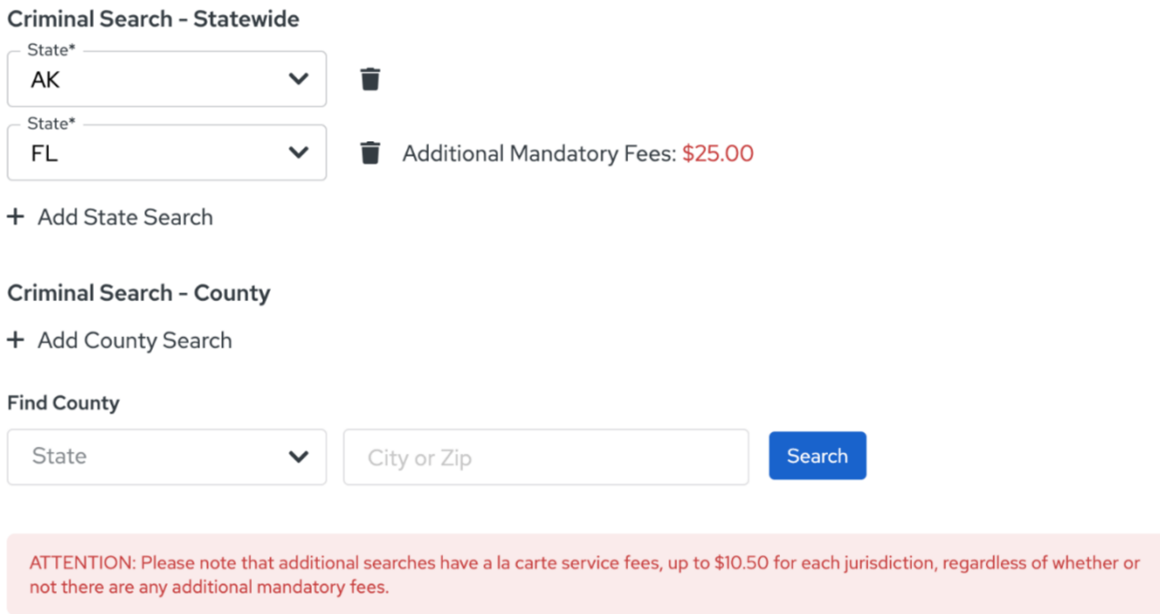
You can add additional state or county searches to your order, and you will be charged the additional a la carte search fees plus any applicable mandatory court fees. If you do not know the county needed, you can search by city/state or zip code and the system will provide the corresponding county.



Example of search once the Add button was clicked for the Statewide search.

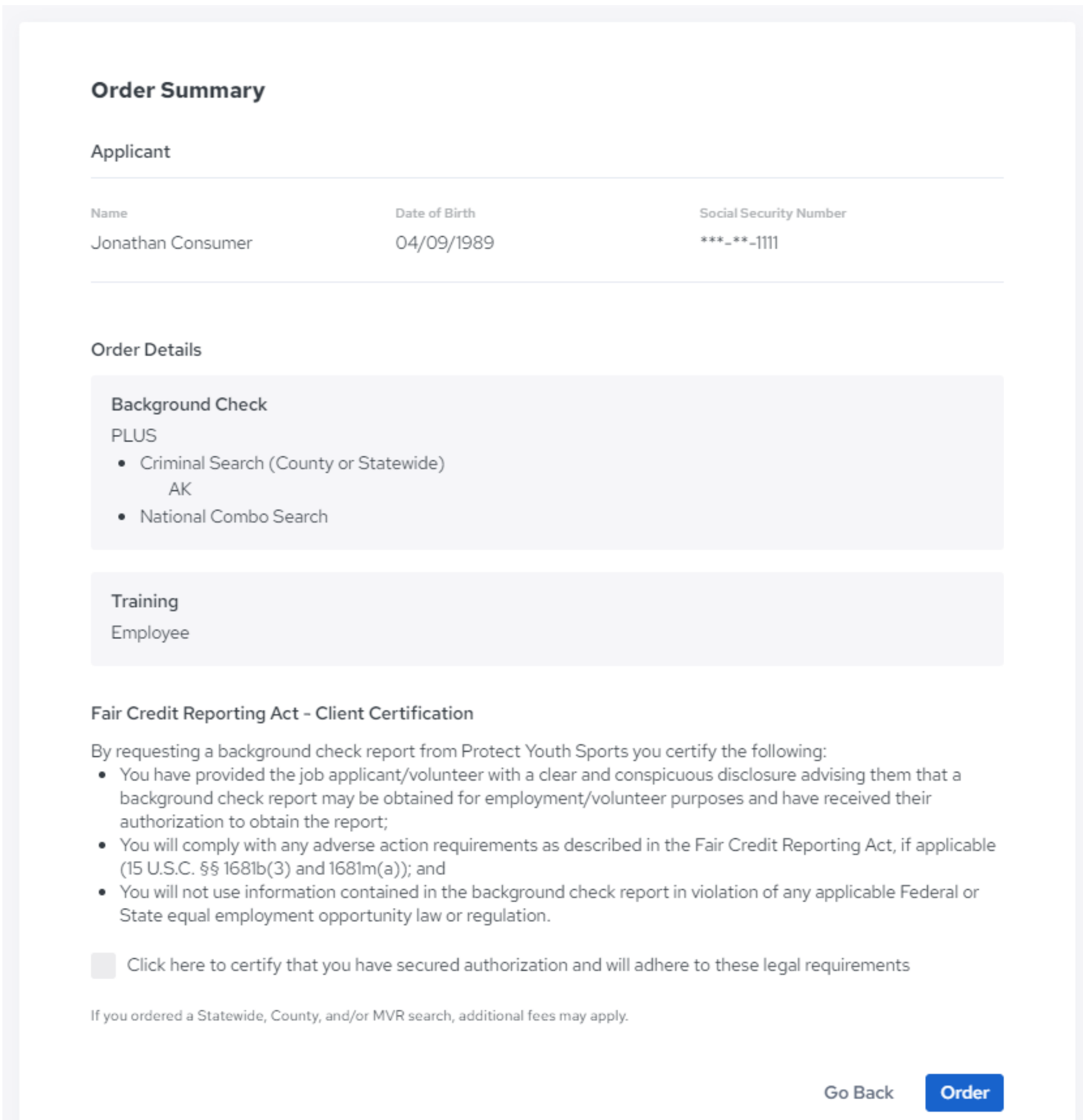


Example of adding an additional statewide search that has additional mandatory fees that I agreed to pay when prompted. If, after viewing the cost, you change your mind, you can remove the search and add a new jurisdiction.



Summary Page

Review the information you are submitting, certify the order and click Order. Do not click the Order button more than once and if the system is taking a longer time than normal, please be patient. Once the page refreshes, you can confirm your order in your Background Checks Pending or Complete menu. <u>We do not refund duplicate submissions. There is a warning if the last order was less than 10 minutes ago but if you wait and place a duplicate order 11 minutes later, you will be charged.</u>



Order Summary

Applicant

Name	Date of Birth	Social Security Number
Jonathan Consumer	04/09/1989	***-**-1111

Order Details

Background Check
PLUS
- Criminal Search (County or Statewide)
  AK
- National Combo Search

Training
Employee

Fair Credit Reporting Act - Client Certification

By requesting a background check report from Protect Youth Sports you certify the following:
- You have provided the job applicant/volunteer with a clear and conspicuous disclosure advising them that a background check report may be obtained for employment/volunteer purposes and have received their authorization to obtain the report;
- You will comply with any adverse action requirements as described in the Fair Credit Reporting Act, if applicable (15 U.S.C. §§ 1681b(3) and 1681m(a)); and
- You will not use information contained in the background check report in violation of any applicable Federal or State equal employment opportunity law or regulation.

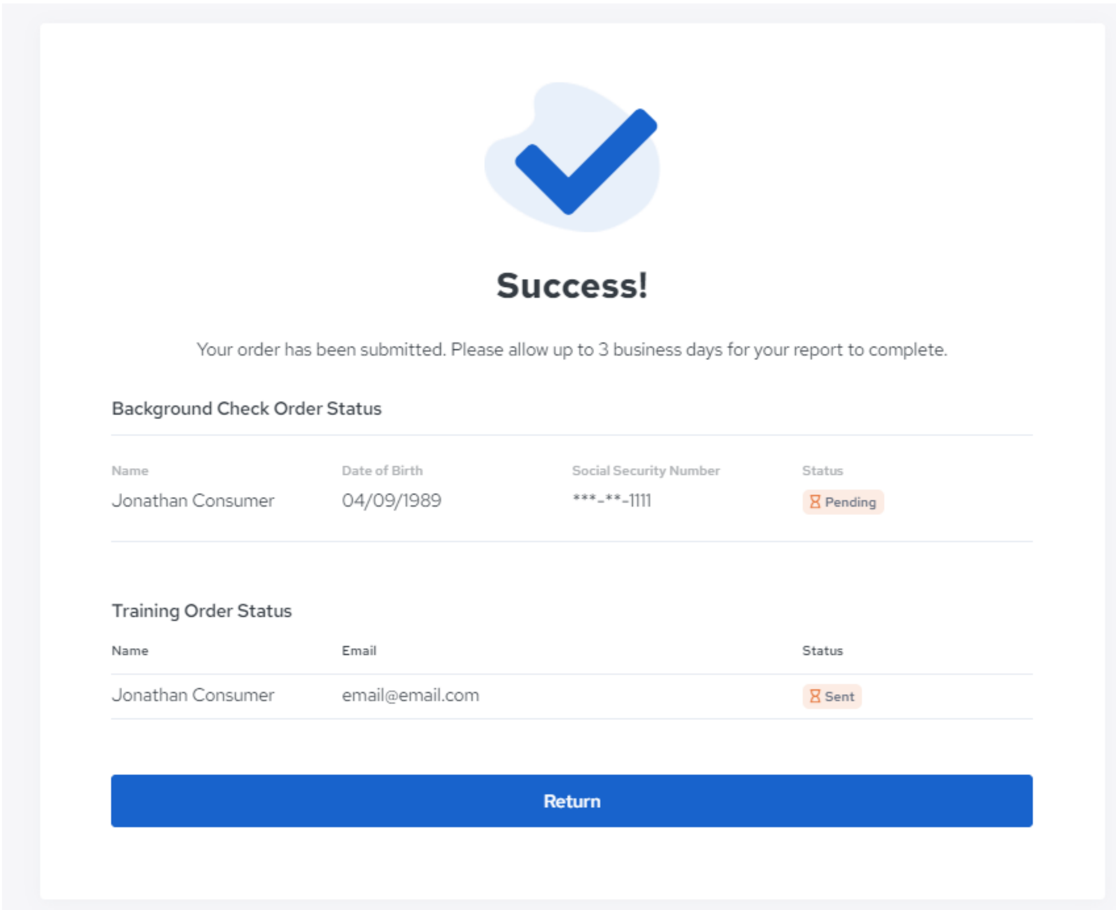
Click here to certify that you have secured authorization and will adhere to these legal requirements

If you ordered a Statewide, County, and/or MVR search, additional fees may apply.

Go Back Order

Success Page

The status of your order will be shown once submitted. Click Return to go back to your applicant list.



**If training was ordered with the background check, you will be notified if the email has been sent. If the applicant already had a training order in progress, it can be resent from the pending menu if the applicant did not receive it. Confirm the email address is correct before resending.*

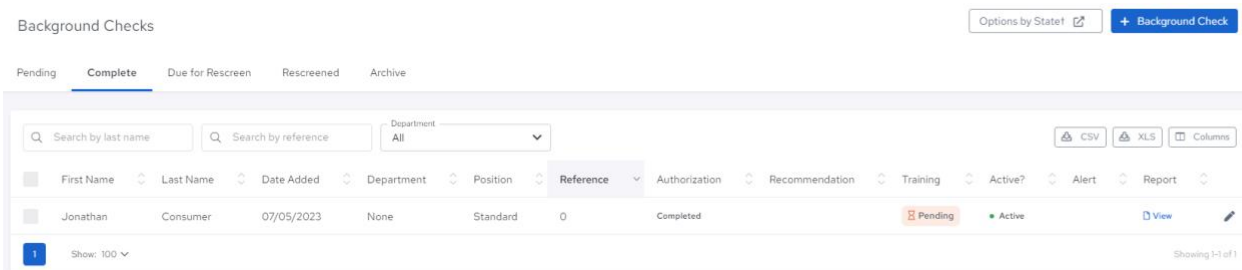
Viewing Background Reports [01234]

New: you can hide columns on your background check pages-simply click the “Columns” button and uncheck the columns you do not need to see on your view. This is set by a cookie so if you clear cache/cookies from your browser, your selection will be lost, and you will need to set it again.

There are a few ways to find and open a completed report.

1. The first is from the Background Checks section in the Main Menu. After selecting the Background Checks menu, all completed reports are displayed.

New: Order of items-The Report column in on the far right and when the screening is complete, View will be displayed. Simply click on View to view the background report. Once the report has been viewed, the status will change to "Viewed." Alerts for background checks and risk assessment status (optional) are also shown on this page.

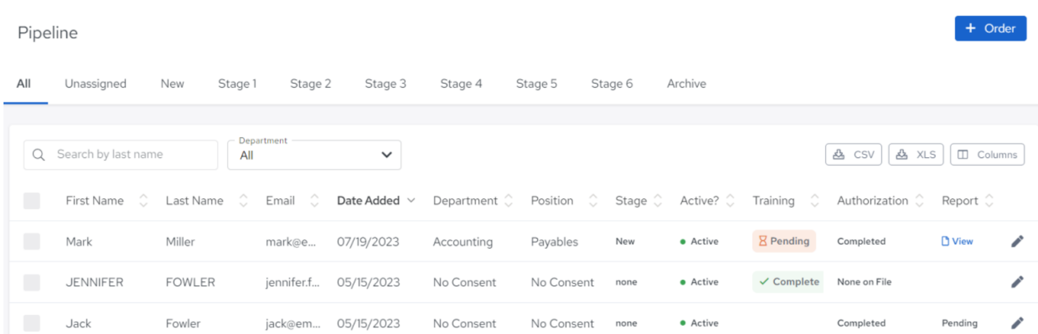


2. If the report is not yet complete, it will appear in the Pending tab. <u>Do not</u> place the order again if the status is pending -even if you think the report is taking longer than normal to complete. Your account will be charged for duplicate searches.

Most searches are complete in 1-3 days, but you may call our support desk to check the status after 72 business hrs.

3. The final way to view the background report is straight from the Pipeline (*The Pipeline is a feature only offered to Bundle 2-4 accounts).

New: The order of items has changed. The last column on the grid is Report, when the screening is complete, View will be displayed. Simply click on View to open the pdf for the background report. A Pending status indicates we have the order but have not yet completed it.



It is recommended that you Archive the report once it has been viewed. Archiving the report from the Background Checks complete section will not archive the applicant that is in the Pipeline. It will only archive (remove) the report from the 'Complete' menu in Background Checks.

Child Safety Training [1 2 3 4]

New- you can hide columns on your training pages-simply click the "Columns" button and uncheck the columns you do not need to see on your view. This is set by a cookie so if you clear cache/cookies from your browser, your selection will be lost, and you will need to set it again.

There are several ways to order training:

- **Main Menu>Child Safety Training> + Training** button in the top right (bundles 1 and higher)
- **Pipeline > + Order > Select Child Safety Training** tile (bundles 2 and higher)
- **Training** can be added on to a background check at the time of the order (bundles 1 and higher)
- Select applicant from **Pipeline> Email Training Invite**

This is an online video course and quiz. There are three versions: Employee (full training-approx. one hour), Volunteer (condensed version-35 min) and Spanish (same content as the Employee version-approx. one hour). You must have a valid email address for your applicants.

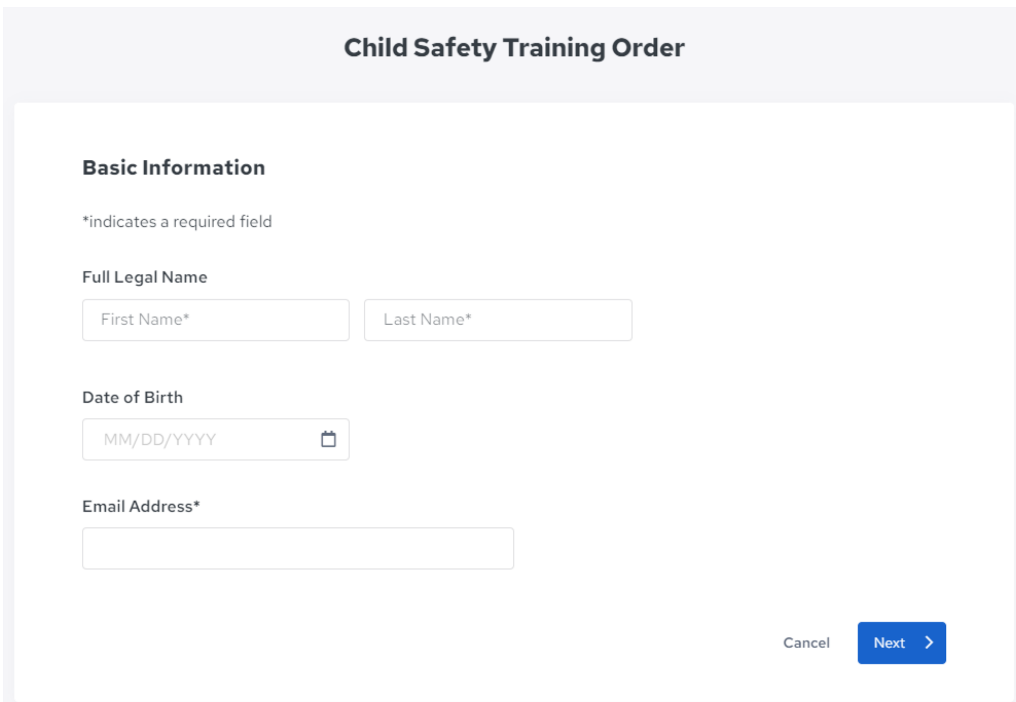
Order Training

Our Child Safety Training order page will indicate fields required to order a background check with an asterisk. You will be asked to accept a disclaimer before ordering and this disclaimer will be presented once per user session.

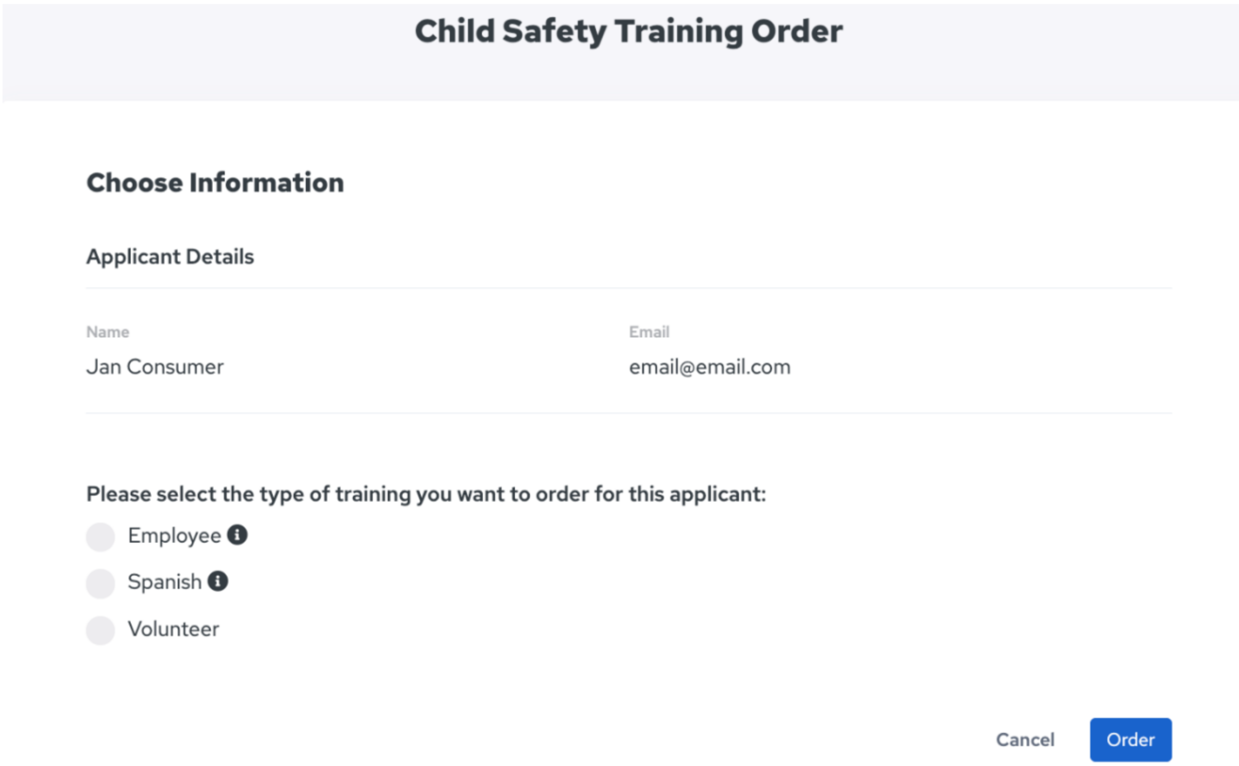
All training emails are sent from message@protectingourkids.com but you can customize the email message sent to your applicant in your Training Email Settings.

Settings>Training Email Settings

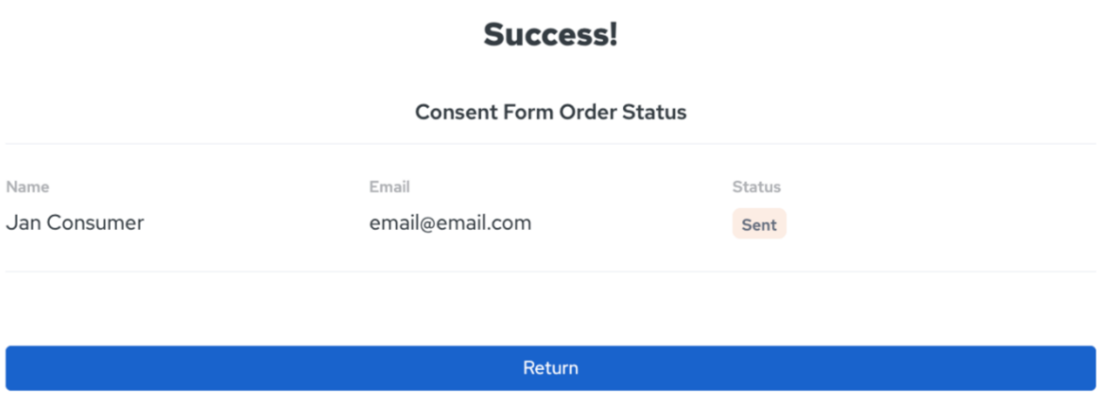
Add Applicant Details



Select Training Type



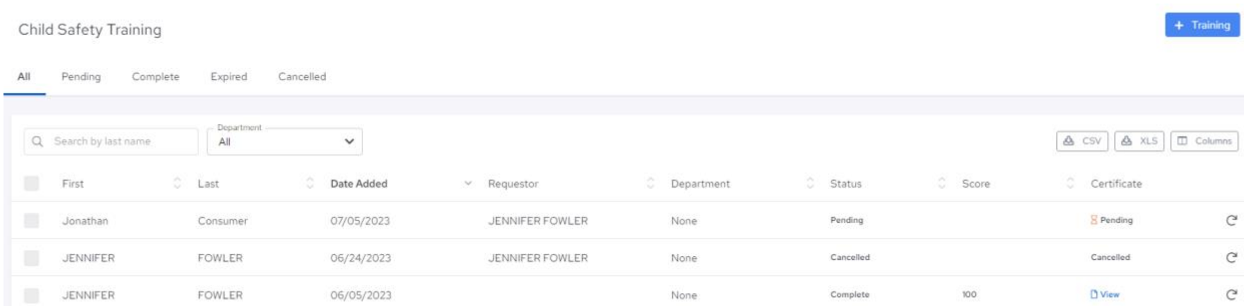
Success Page



Once you click ‘Return’ you will be taken back to order your next training, or you can navigate to a different menu.

View Training Results

The results of completed training can be found in your Child Safety Training menu. The filter defaults to a new default ‘All’ view but you can also filter by just Pending, Complete, Expired or Cancelled. Clicking on “View” will allow you to view/print the certificate. If an applicant says they completed the training, but their status has not updated, they did not save their score. Applicants must click “View Certificate” when satisfied with their score for you to view the save their score and view the full certificate of completion. If they forget, they can go back to the link, click it again and from there they can save their score.



- Pending training will be found in the Pending menu. You can resend, cancel, or order a new training from here to one or multiple applicants.
- Expired training (training where the applicant did not complete the course and exam within the 14 -day limit) will be found in the Expired menu. You can resend a training to an applicant whose link expired but the expired link will always remain in the Expired menu and the new link generated will appear in Pending and move to Complete if they finish the exam and view their certificate.
- Cancelled trainings are invitations that have been manually cancelled by a user within your organization. You can choose to resend the invitation or order a new training course from here as well.

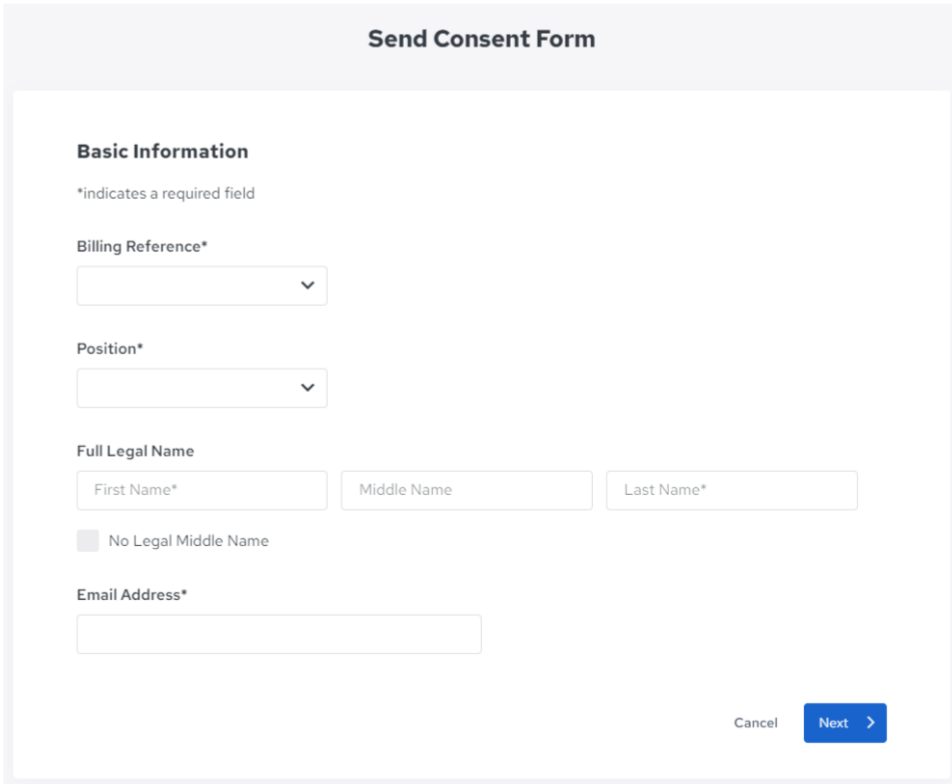
Online Application [234]

Sending the Online Application to a new applicant

Menu>Pipeline>+ Order >Send Consent Form to a new Applicant.

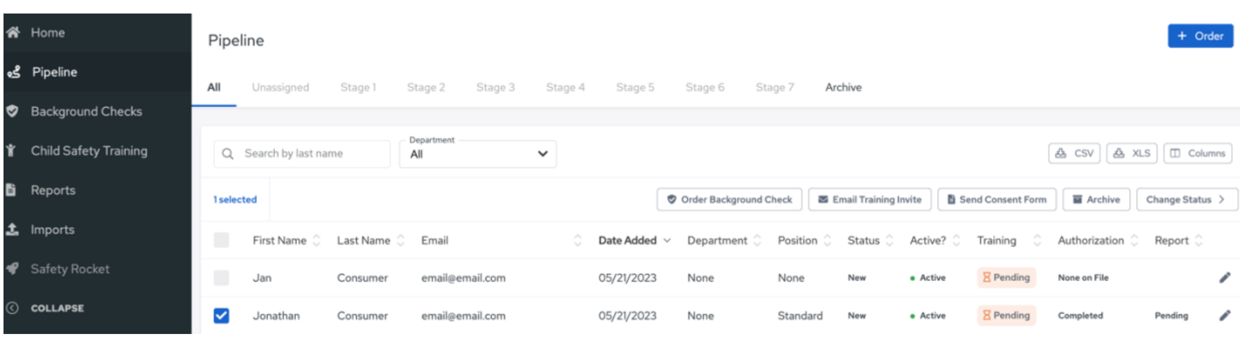
New: our online application has been updated to show the Disclosure and Authorization separately making it more compliant. Please review your disclosure and authorization language.

All accounts have been updated to reflect our latest default language. You can modify this language by going to your **Settings>Forms>Edit**.



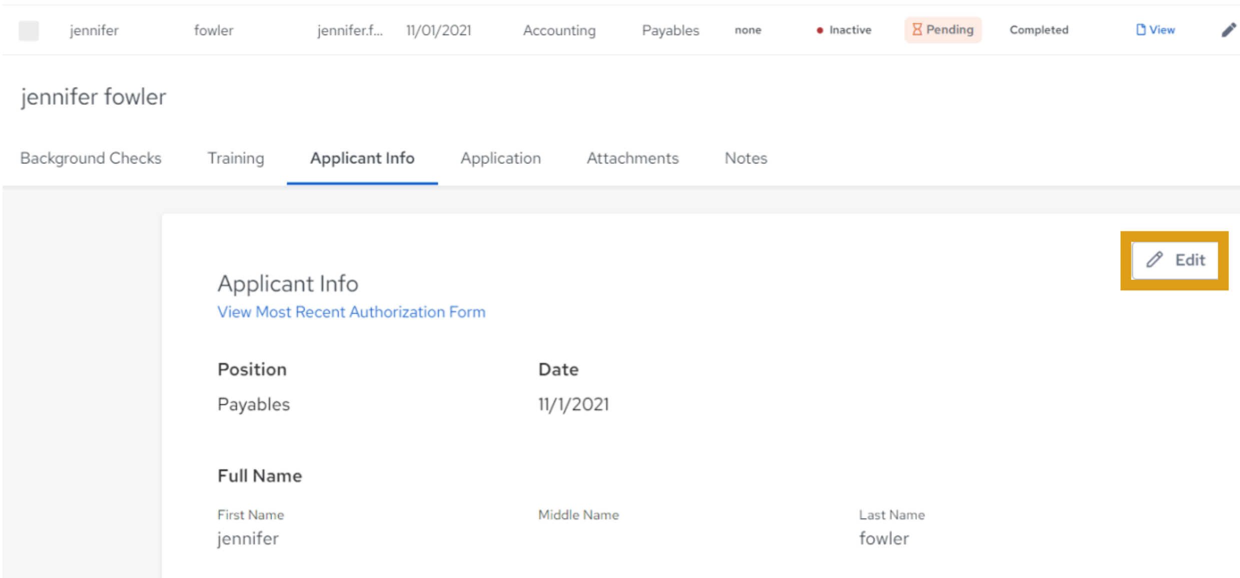
Resending the Online Application to an existing applicant with no changes needed.

Pipeline>All>Filter by applicant last name>Select applicant and use Actions bar>'Send Consent Form' to an existing applicant who has been screened before (this option does not allow you to change the position the applicant is assigned to.

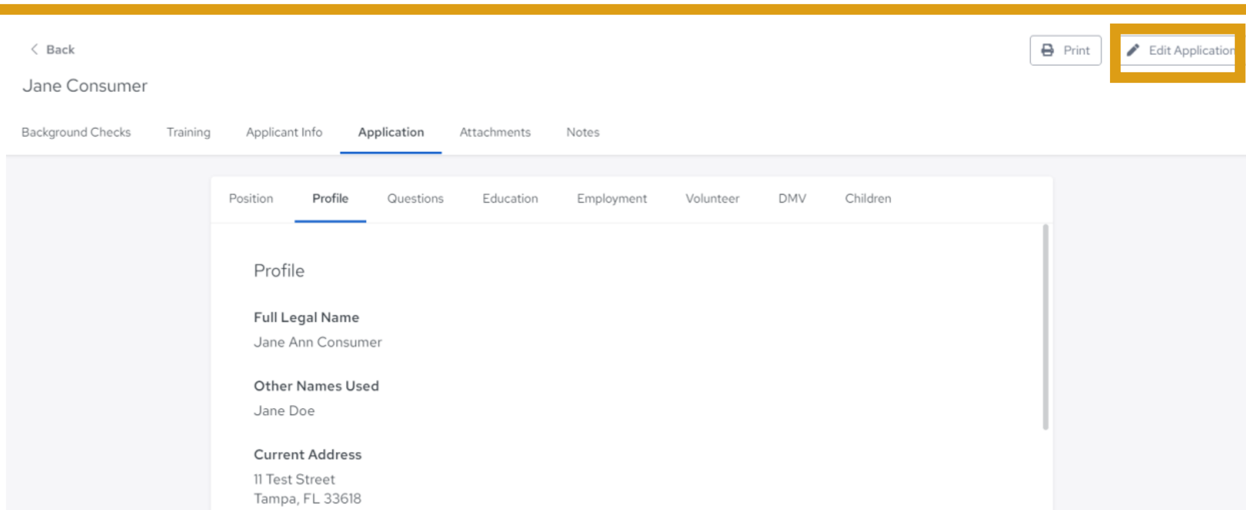


Sending an Online Application to an Applicant who needs a change of email or position.

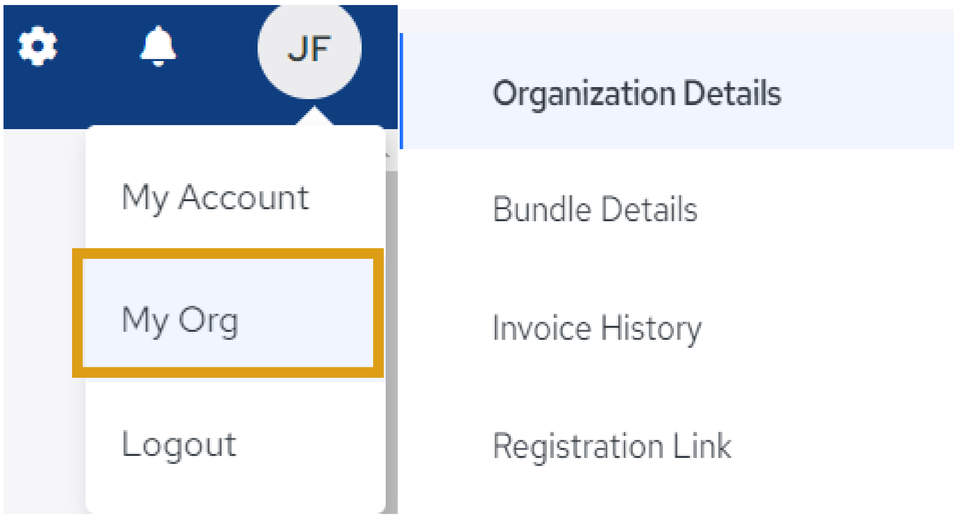
New: If you need to edit the applicant's email or change their position, use the pencil icon on the far right and then select the Applicant Info tab and edit to make necessary changes.



New: Editing the application for an applicant has also been improved. All questions and information submitted by an applicant can be accessed through the application. There is no more application questions tab.



***Only Bundles 2 and higher have access to an online application. You can find your public link in your "My Org" Tab in the upper right-hand corner beneath your user initials and then select "Registration Link." Warning-posting this link on a public website could result in unwanted applications.*



You can also customize the look of your online form by visiting your Customization menu of your Settings. Settings can be found in the top right by clicking on the gear icon.

You can also use our Send Consent Form option to email a unique link to your applicant.

Pipeline> + Order> Send Consent Form

You can customize the email that is sent in your Consent Form Email Settings. Settings can be found in the top right by clicking on the gear icon.

Pipeline [2 3 4]

New: you can hide columns on your pipeline pages-simply click the "Columns" button and uncheck the columns you do not need to see on your view. This is set by a cookie so if you clear cache/cookies from your browser, your selection will be lost, and you will need to set it again. Each menu page needs to be set individually so changes you make to your Pipeline view will not affect your Background Checks or Training views.

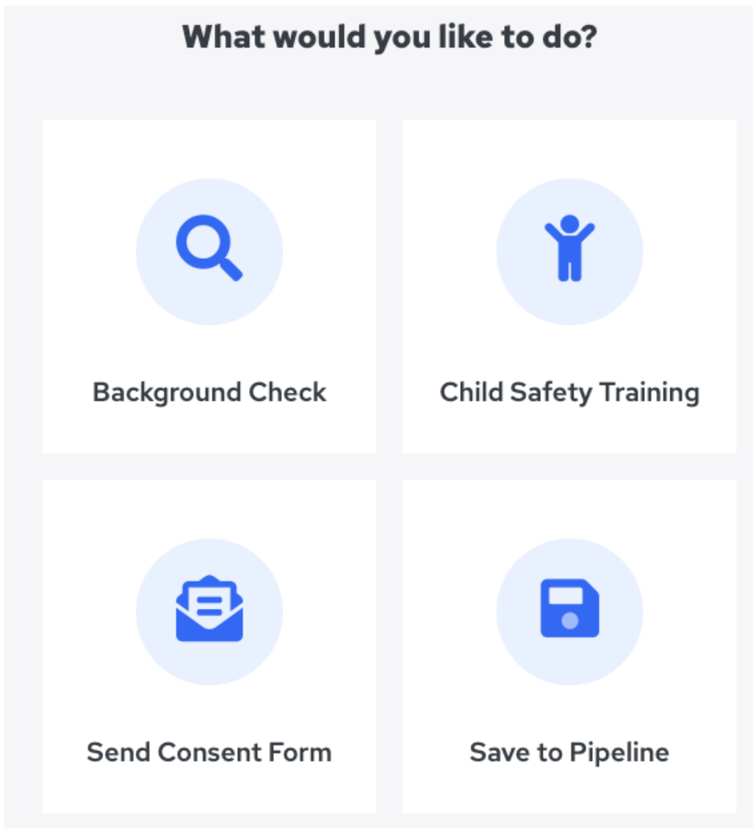
The purpose of the pipeline is to be able to view and manage your applicants.

New: To begin using the Pipeline, click on the blue + Order tab in the top right of the page.

This is the starting point for adding a new applicant into your account. Each time you perform an action for an applicant here, you are creating a new profile for an applicant. From this menu you have the option to:

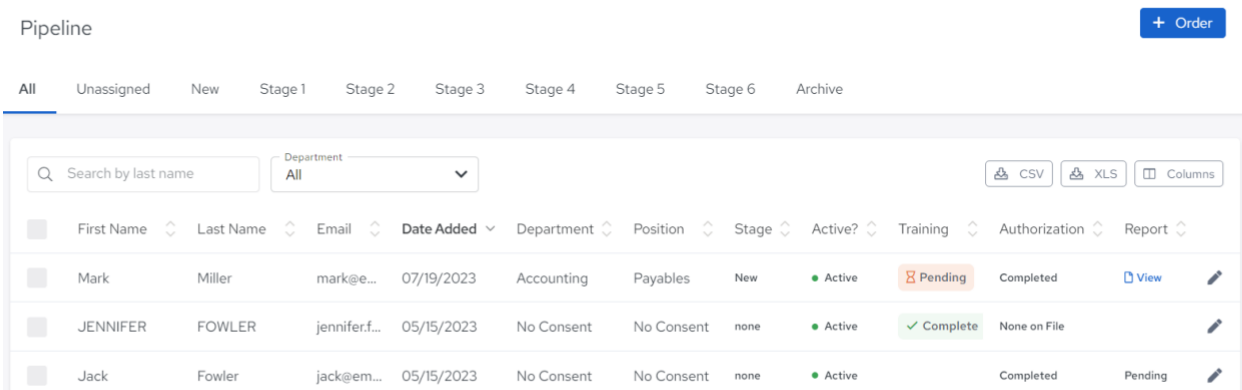
- Order background checks for new applicants (see Background Checks for more info)
- Order child safety training for new applicants (see Child Safety Training for more details
- Send consent forms to new applicants (see Online Application for more details)
- Save a new applicant to the Pipeline for later (this only adds an applicant to your account-nothing else)

Each option you select will direct you to the proper page to collect only the minimal information needed to process your request.



Depending on the action you selected, the applicant will then appear in your pipeline once the form is complete and any status for that applicant will appear.

Sample Pipeline View:



View in the Report column= Report is complete and ready to view. Click on ‘View’ to view the report.

Pending in the Report column= Report is pending

Complete in Training = Training has been passed/completed and the score and certificate can be viewed from your Training Complete menu.

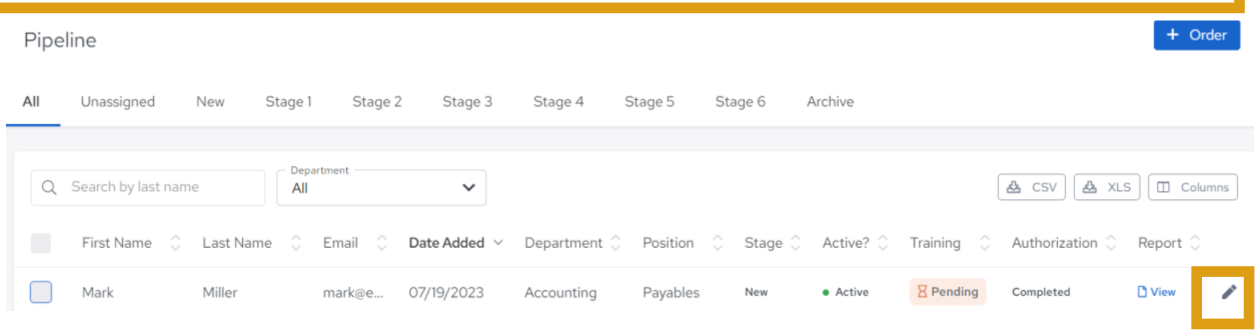
Pending in the Training column = Training invitation has been sent but the applicant has not yet completed the course.

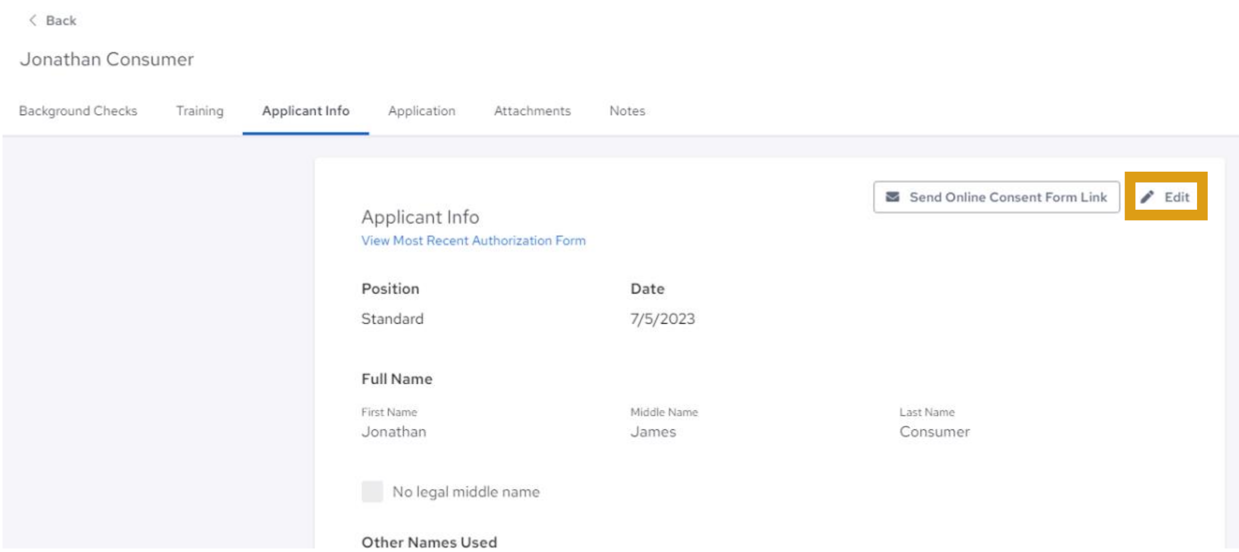
Completed in the Auth column means the applicant has submitted their online consent form.

None on file in the Auth column means the applicant has been added to the account but has not submitted the online consent form or had someone place an order for their background check and certify they have a copy of the consent form.

View/Edit Existing Applicant

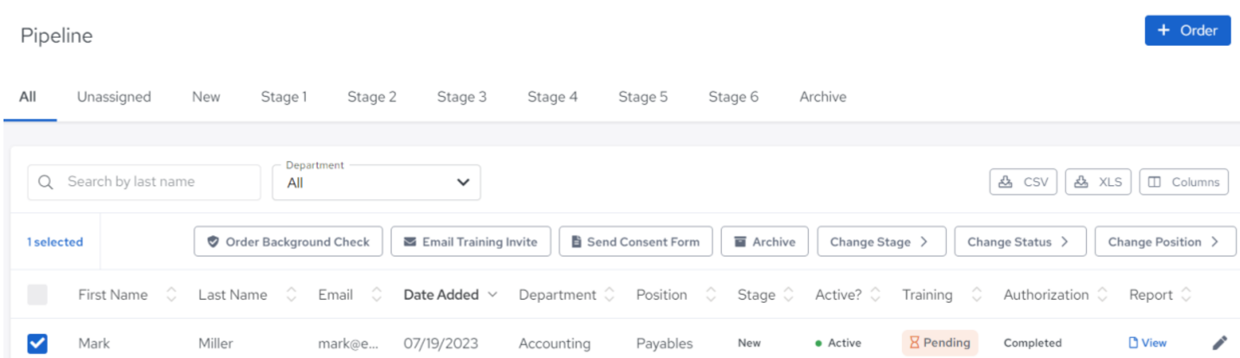
New: To view the profile or edit an existing applicant, use the pencil icon on the far right of the row containing their name and then select Applicant Info. You may make changes on that page and then click “Save” at the bottom.





Perform Action on Existing Applicant

If an applicant exists in your Pipeline, there are several actions you can perform:



1. Order Background Check
2. Email Training Invite
3. Send Consent Form
4. Archive
5. Change Stage (bundles 3 and higher)
6. Change Status
7. Change Position (bundles 4 and higher)

New: To perform an action on one or multiple applicants, check the box for their name and then select the action from the options above. These actions were previously in a left-hand menu and have been relocated with our design update. The actions available will be limited by bundle.

Save Applicant to Pipeline

Menu>Pipeline>Create New>Save to Pipeline

Use this option to add an applicant to your account for future consideration. Upon Saving, no action will be taken. No orders will be processed, and no emails will be sent. You can come back to the applicant later to perform necessary actions such as ordering or sending the online form.

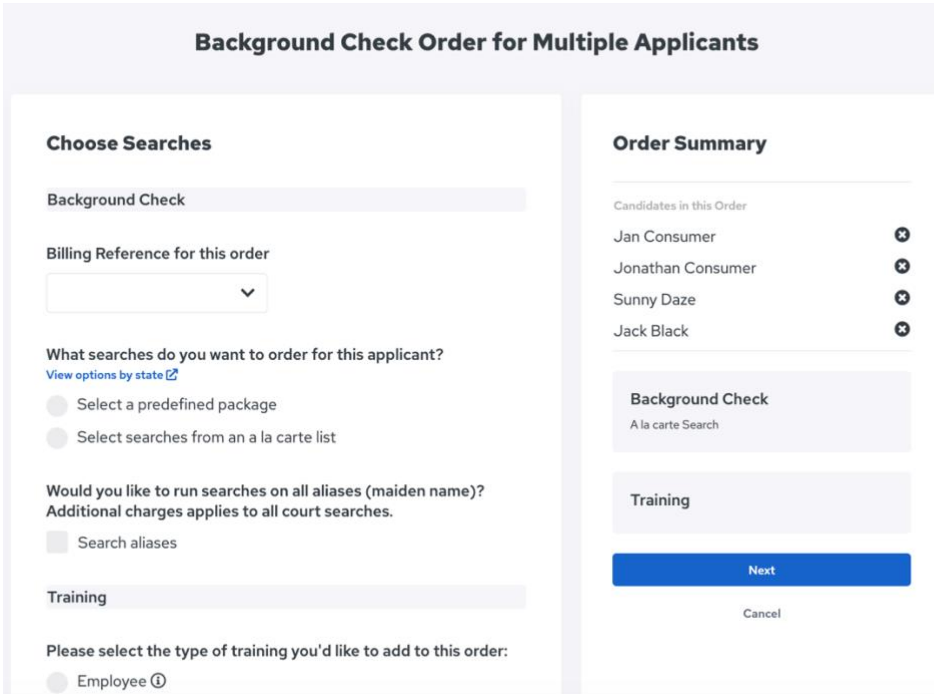
Perform Bulk Actions on Applicants

Menu>Pipeline>All>Select Applicants

You can select up to 50 applicants on a page and perform a bulk action. You can order the same package for all applicants (if all applicants are over 18), Order the same training for all applicants, or send the online form to all applicants.

Once all applicant names have been selected, make your selection from the Actions bar. Follow the remaining steps to review and confirm your order. You can deselect applicants on the right in the Order Summary if needed.

New: when ordering on a single applicant or ordering in bulk, the system will warn you if an applicant is missing needed information and provide a direct link to update their profile in a new tab, save and then refresh your order to complete the ordering process.



Setting Up Your Account [01234]

New: Access all your settings in the top right corner using the 'gear' icon.

Portal Customization [2, 3, 4]

Home Page URL[4] Enter the web address for your organization's web site. This is not required.

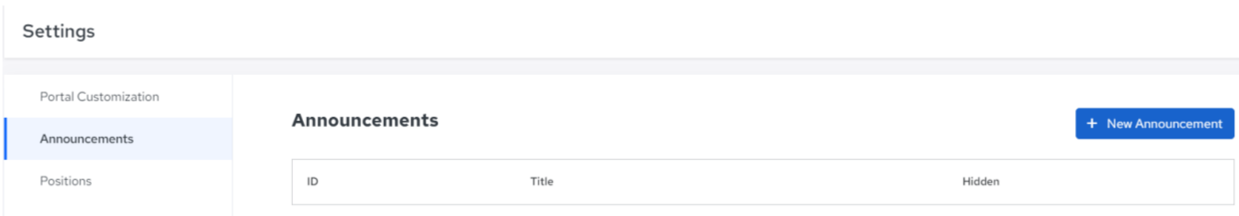
Introduction [4] Enter a greeting for your organization's web site. This is not required.

Logo Image [2,3] Use customization to add a logo or banner as well as use our color picker to enhance the online form your applicants will see when sent our online link. Upload your logo to the size of 300 pixels width or upload a banner image, recommended size is 720 x 150. This works best in JPEG or PNG format.

Click Update to save or Update and Preview to view your saved changes.

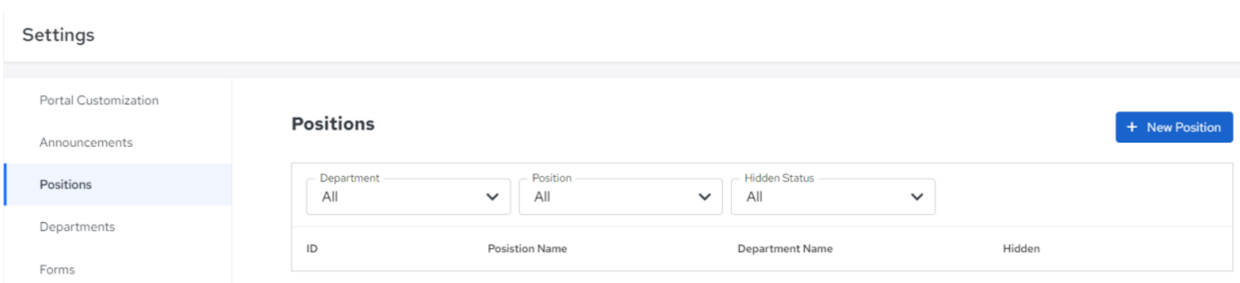
Announcements [4]

Click + New Announcement to add an announcement for visitors that apply online through your job board. Announcements will appear in the default order in which they were created. To re-order the announcements, use the Place Before drop-down menu.



Positions [4]

For customers using our job board, you can create departments and positions to segment your applicants. You will need to set up your departments first so you can assign the Positions you create to a department.



Click +New Position to create a position or 'Edit' to modify an existing one.

Enter the name of the position.

It is a good idea to enter a description of the Position in the Description box. This will give your applicants a better idea if the Position is right for them.

Choose the Department that the Position is associated with.

Choose the Form that goes with the Position.

- It is recommended that you use the same names for your Departments and Forms, this will allow for easier organization.

Check the Requirements and Other Requirements for the Position; also include any Additional Requirements in the text box.

- These requirements will NOT automatically order a background check. They are simply a reminder during the process of moving the applicants through the Pipeline.

Positions will appear in the default order in which they were created. To re-order the positions, use the Place Before drop-down menu.

IMPORTANT: Deleting is not an option at all in Ministry Mobilizer. Editing and renaming are available options.

It is recommended that you DO NOT rename positions. The only exception to this rule is if the name of the position is changing, but the description remains the same.

- If your department decides to rename the "Infant Volunteer" to "Baby Volunteer," and the description/position is the same, then the name can be changed.
- When a Form/Position/Department is renamed, all past applicants will have their forms/positions/departments changed also.
- If the "Infant Volunteer" is changed to "Summer Intern," then all past applicants will change from Infant Volunteers to Summer Interns.

If you need to get rid of a Form, Position or Department, check the Hidden box on the old one and add a new one.

Departments [4]

Click + New Department to create a new Department or 'Edit' to modify an existing one.

- Please check with the system administrator before you add or edit departments. It is essential that you keep department names consistent across all avenues of communication.
- Departments will appear in the default alphabetical order.
- If, at any time, you do not want certain departments to show up on the webpage, simply check the Hidden box then Save Button.

Forms [2,3,4]

A form is used to collect applicant data and provide disclosure and authorization for the background check. Bundles 2 and higher can modify their form or if bundle 4, they can have multiple forms. These different forms can have questions specific to that position/opportunity and can be assigned to different departments so that they are reviewed by the individual responsible for that department. (Bundle 4 only)

Click + New Form to create a new Form or 'Edit' to modify the default form.

1. Assign a name to the form. You can name the form for the position it correlates to (teacher, minister, bus driver etc.) or you can name the form for a type (volunteer, employee, administrator) which allows the form to be used for multiple positions or opportunities. Think through your organization's processes before you begin to save time later! I suggest mapping out your departments, positions etc. and your workflow process to make the system function most efficient for you.
2. Check the box "Authorization Required" if you want the applicant to be required to submit an authorization to submit their application. This is extremely important if you are not collecting a separate paper authorization for ordered background checks.
3. New enter both the "Disclosure" and "Authorization Text" your users will read before signing to authorize their application. You are welcome to use our default text or consult your legal counsel for custom text. Be sure to check the local, state, and federal laws if you are unsure of the requirements. If you modify your English language, you must modify your Spanish language text or use our default Spanish text. We can also disable Spanish, so this is not an option for your applicants. Spanish will not be displayed for new accounts but can be added if desired. Please contact support.
4. By checking the "Require Driver's License" box, applicants will be required to submit their DL info on their application. You may choose to require this if your organization plans to run an MVR search for a driver type position.
5. Stock Questions are questions we have prepared for different areas of the application. Only check the boxes for those types of questions you feel are necessary for the position the applicant is applying for or information you feel necessary to have on file. To see the specific custom questions for each area, you can click on the 'Preview Questions' link before requiring them on your application. *Note-there is an option in this section called 'Ask Custom Stock Questions' [4]- check this box if you plan to add your own custom designed questions for your application such as Do you have any special talents that could be useful to the position to which you are applying? These custom questions can be created once you hit the "Save" button for your form or at any time by going back to the Forms section of Settings. You will have the option to create dropdown, yes/no, short or long answer type questions as well as provide instruction only statements with no expected response. You can also require your applicants to provide their email address by checking the last box in the Stock Questions area.
6. If there are questions you will use in multiple forms, or multiple times in one form, we suggest adding Stock Questions (in the Settings Menu), to simplify the process of creating your application questions. Please note that these questions/answers will not be exported to the report.
7. If you are going to add your own custom questions to your form, click save and then enter those (see **Image A**). The custom questions will appear in the order in which they are created. To re-order the questions, use the Place Before dropdown menu. You can also make the questions required by checking the box next to "Required?" at the bottom. Yes/No questions will automatically be required to answer. You can also hide questions when you no longer want the question to appear on your form (deleting is not an option).

If you are creating a Dropdown type question, we suggest that the first entry be "Choose One" or something similar. The first entry you type in this field will be the default answer unless the applicant chooses one of the other choices.

8. Once your Form for your position is complete, you may preview the form by clicking on the "Preview" tab at the top of the Form page. After reviewing your form and making any necessary changes, you can go to the 'Positions' section in Settings and choose the position that this form belongs to. Select the form from the dropdown choices (see **Image B**)

Image A

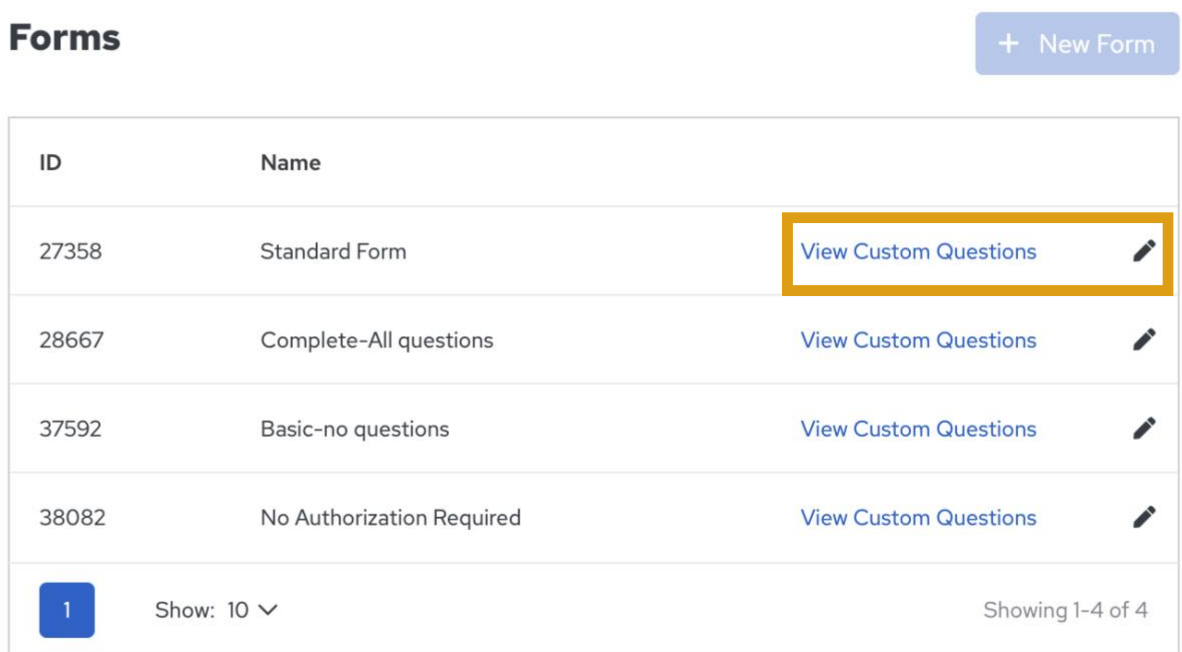
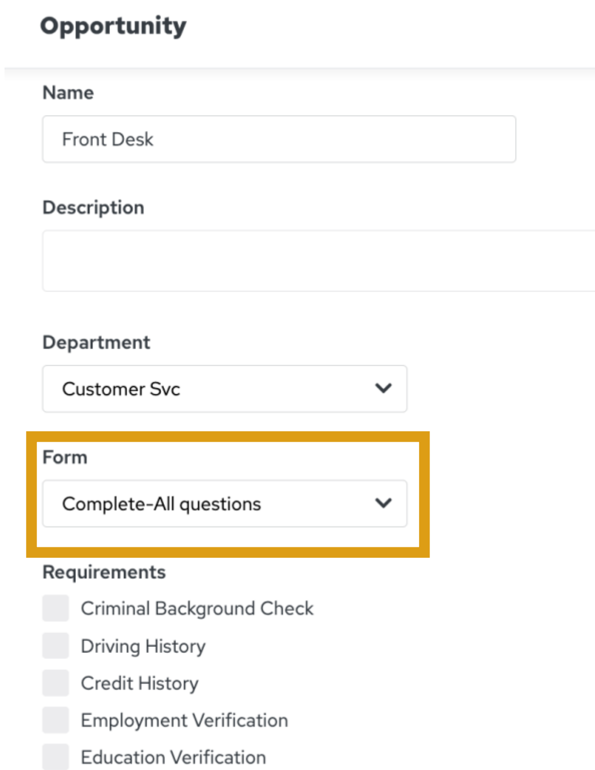


Image B



Stages [3,4]

The Stages in your Pipeline can be set up in a variety of ways to help you track or group your applicants, depending on the needs of your organization.

- We recommend leaving the New and Archive stages, changing them will affect your workflow and applications.
- To create a Stage, go to the “Stages” section of Settings in your Menu.
- Click on Edit to name a stage.
- Enter the name for the stage and click Save.
- Continue this process until you have named all the stages you plan to use.

Once all the stages have been named, you can view them by clicking on Save or “Stages.”

Your Pipeline will also now show these stages that you have created.

Pre-defined stages:

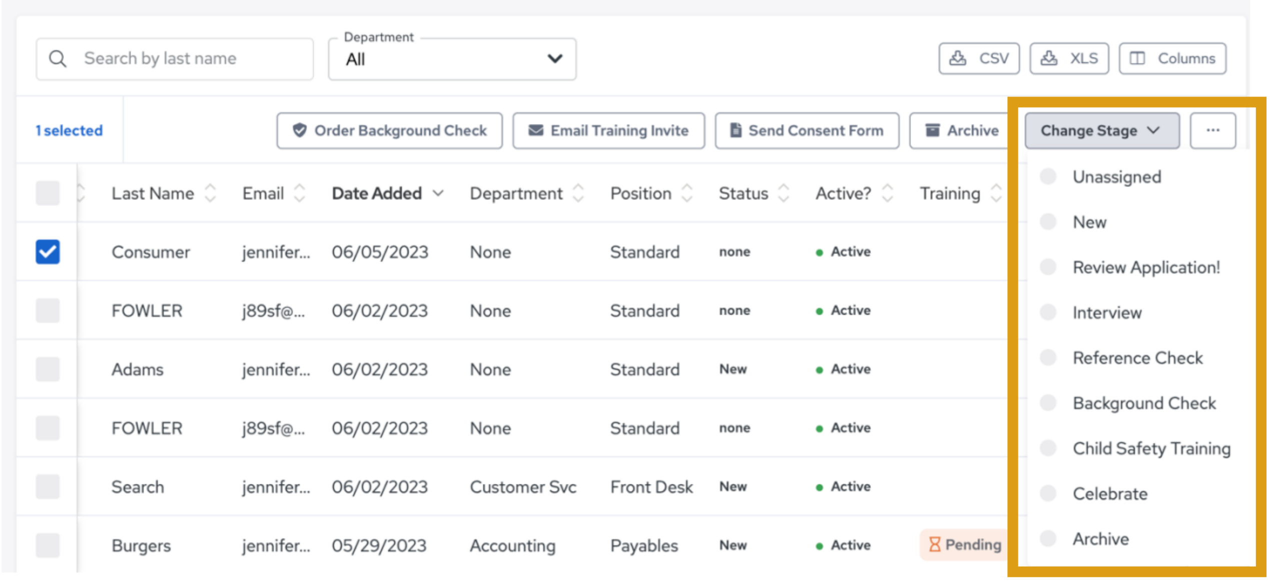
ALL: You can view all your applicants –this shows you an overview of where everyone is in your process.

UNASSIGNED: These are candidates that have applied through your online opportunity and have not yet been assigned to a stage.

NEW: These are candidates who have been manually entered into your Pipeline but have not completed an online authorization. They may be candidates where you have chosen to send the link to the applicant, but the applicant has not yet submitted an authorization. Once they complete the authorization, their stage will change from New to None until they are assigned to a stage.

ARCHIVE: Clients use this stage differently. Some choose to archive all applicants once they have completed their onboarding process. Others use Archive for applicants no longer active with their organization. It is up to you to decide what works best for your organization. Unless you have access to Stages, you will not be able to remove someone from the archive.

Assigning Applicants to Stages: To move your candidate through the “Stages,” go to “Pipeline” in your Menu. You can move an applicant to a different stage by checking the box to the left of their name and selecting a stage from the “Change Stage” drop down from the Actions menu above (see image below) Allowing your mouse to hover over the Move to Stage field will reveal all your stages. Slide your mouse over to the stage you wish to move the candidate to and “click.” Your candidate’s stage will now be updated. You can also select multiple candidates at one time and then move them all to a particular stage to save time.



Billing References [1,2,3,4]

Manage your internal billing and budgeting by selecting a Billing Reference when ordering. We will subtotal your invoice by the codes you set up.

Click 'New' to add a billing reference, add name and save.

Additional Settings

You can set a rescreen interval for your applicants here. This will put those applicants into the Background Check Rescreen Menu based on the interval you set.

You can also make Billing References required here to force a user to select a billing reference when ordering a background check.

Training Email Settings [1234]

All child safety training emails are sent from our domain message@protectingourkids.com You may customize the email body though. Please be sure to follow the instructions to keep the tags in the email body as directed.

Consent Form Email Settings [234]

You can change the 'From' Email address that your emails are sent from. Please note that there is a higher bounce/spam rate when you do this unless you have updated your email server to allow us to send email using your domain. We cannot help you with this.

You can also customize the email body. Be sure to leave the 'tags' in your email as directed. This note in your settings will remind you.

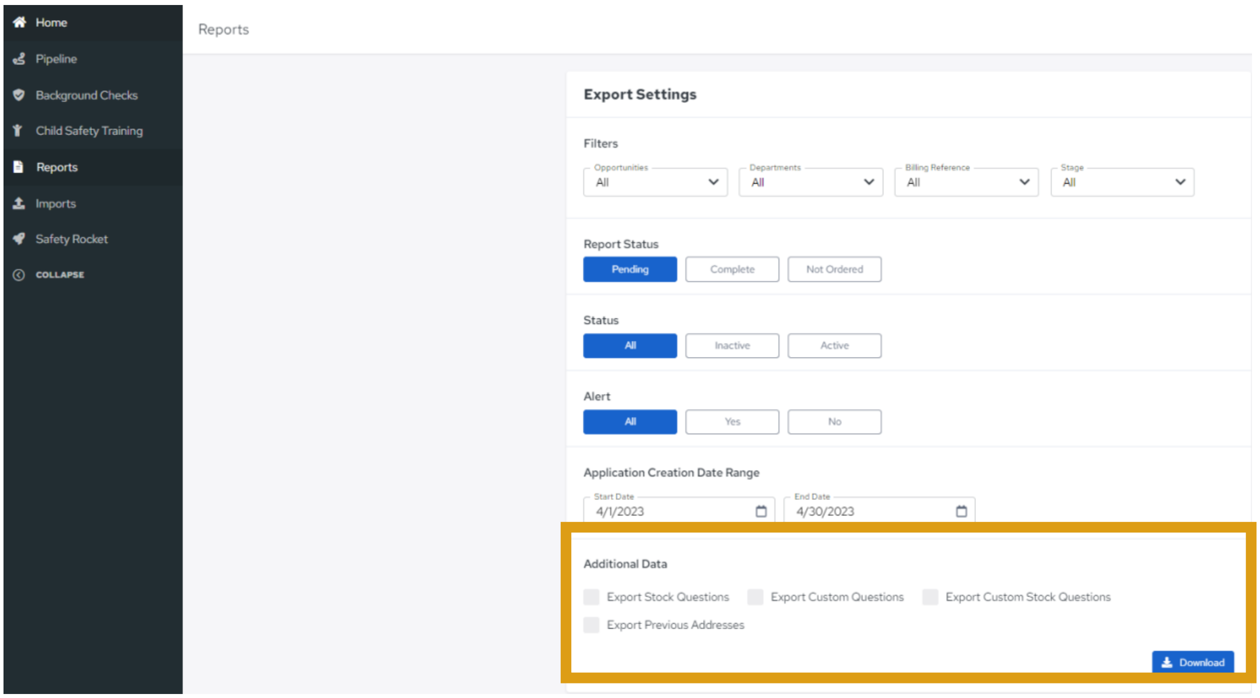
Please add [ApplicantFirstName], [ApplicantLastName], [ClientName] and [InvitationLink] tag in email body

Downloading Reports [01234]

Main Menu>Reports

From the Main Menu, select Reports and then select Export Reports

Several filters exist for customizing the data prior to export.



Click Download and an Excel file will be created for the data.

If you need to save the data in a CSV or flat file format: from within Excel, choose File, Save As and change the file type to what you need.

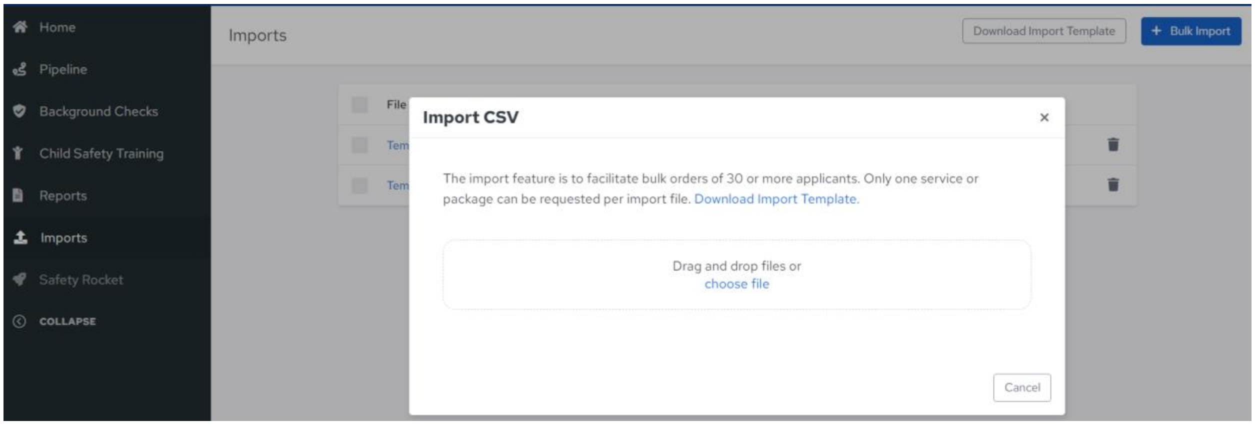
You can also export data directly from the grids in Pipeline, Background Checks and Child Safety Training by simply clicking on the export buttons in the upper right-hand corner of those pages.

Importing Applicants [01234]

Main Menu> Imports

You can upload batch information for many applicants at one time using the Imports feature. A minimum of 30 applicants is required.

From the Imports menu select + Bulk Import.



From this screen you can download the import template. All information required must be formatted properly and included with your file. Create your file and save. And then drag and drop the file as indicated or choose the file from your computer to import.

After your file is uploaded successfully, customer service will be notified of your upload and can begin processing your request. They will delete the file after the import is successful. No files with SSN information should be stored once imported.

Account Information [01234]

Clicking on your user initials in the top right corner will reveal two menus. One (My Account) allows you to manage your personal information and email notifications. The other (My Org) menu allows you to view your organization's information.

My Account

Manage your password and email notifications:

You can opt to receive email notifications for the following:

1. Client receives email notification when an application has been received:

New application by Jan Snow.
Log into your account for details.

https://averity.com/login/Account/Login

2. Client receives email notification when an application has been received for an applicant under the age of 18:

The following Applicant has submitted their details as their age is below 18

Applicant First Name: Jan

Applicant Last Name: Snow

Applicant Email: jsnow@email.com

For your convenience, please click here for a sample authorization and consent form requesting applicant and parental consent.

Log into your account for details.

https://averity.com/login/Account/Login

3. Client receives an email when a background check report is complete for an applicant:

Your report for Barbara Wren, (Secretary), has been completed.
Log into your account for details.

https://averity.com/login/Account/Login

4. Client receives an email when an applicant declines to authorize the background check:

The following applicant has declined to accept the terms of the background check authorization:
Applicant First Name: Michael

Applicant Last Name: Jones
Applicant Email Id: mjones@email.com

Log into your account for details.

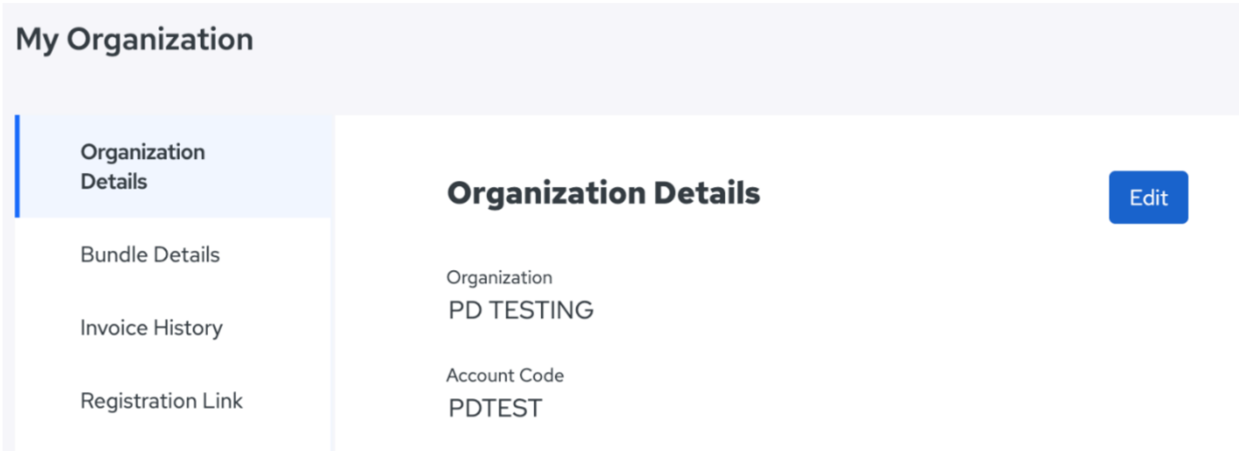
https://averity.com/login/Account/Login

5. Client receives an email when a Child Safety Training has been completed:

Training has been completed by FirstName Jack Last Name Fox
Score: 96.
Log into your account for details.

https://averity.com/login/Account/Login

My Org



- Organization Details- click Edit to submit changes to your account.
- Bundle Details- learn more about your account's bundle type or request to upgrade your bundle.
- Invoice History- view invoices for your account
- Registration Link- view your account's public link.

Support/Billing/Submit Tickets

Use the Question icon in the top right menu for more information and answers to frequently asked questions.

KEY FEATURES	Bundle 1	Bundle 2	Bundle 3	Bundle 4
	Paper-Based	Electronic	Electronic	Electronic
Screen				
Background Checks (Separate)	✓	✓	✓	✓
Rescreen Notifications	✓	✓	✓	✓
Volunteer Tracking	✓	✓	✓	✓
Child Safety Training	✓	✓	✓	✓
Authorize				
Online Consent Form	—	✓	✓	✓
Customized Legal Agreement	—	✓	✓	✓
eSignature Authorization	—	✓	✓	✓
Custom Branding	—	✓	✓	✓
Online Payment Option	—	✓	✓	✓
Process				
Online Application Form	—	—	✓	✓
Online Policy Agreement	—	—	✓	✓
Screening Process	—	—	✓	✓
Document Uploading	—	—	✓	✓
Recruit				
Volunteer Job Board	—	—	—	✓
Volunteer Position	—	—	—	✓
Unlimited Leagues & Depts	—	—	—	✓
Volunteer Contact	—	—	—	✓
Activity Scheduling	—	—	—	✓
Option 1 - Coach (Applicant) Pay		Free	Free	
Option 2 - B1 annual fee B2-B4 one-time fee	$99 annual	$299 one time prepay	$399 one time prepay	$599 one time prepay