



DISA Screen User Guide

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Contact & Resources

Your dedicated Client Care team can be reached via email and phone.

Email: dscreen.service@disa.com

Phone: 877-827-4631

DISA Resource Library: <https://globalhr.helpscoutdocs.com/>

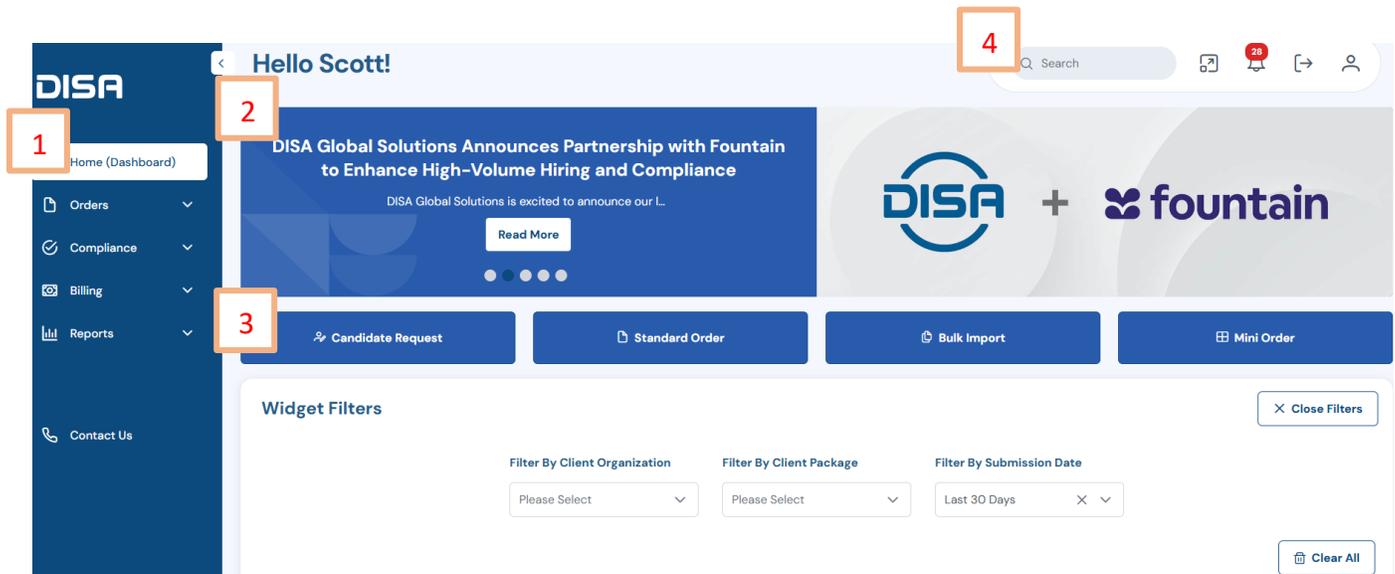
Recommended Web Browsers

- Google Chrome
- Microsoft Edge

DISA Screen Home Dashboard

Dashboard Navigation

1. Navigation pane allows users to quickly access various dashboards, invoicing, and reports.
2. News carousel will pull the latest DISA news in conjunction with your latest notifications.
3. Quick order links offer an easy way for you to place an order right from the home dashboard. These are permission-based so you might not see all options.
4. Search bar allows you to quickly look up a candidate's report.



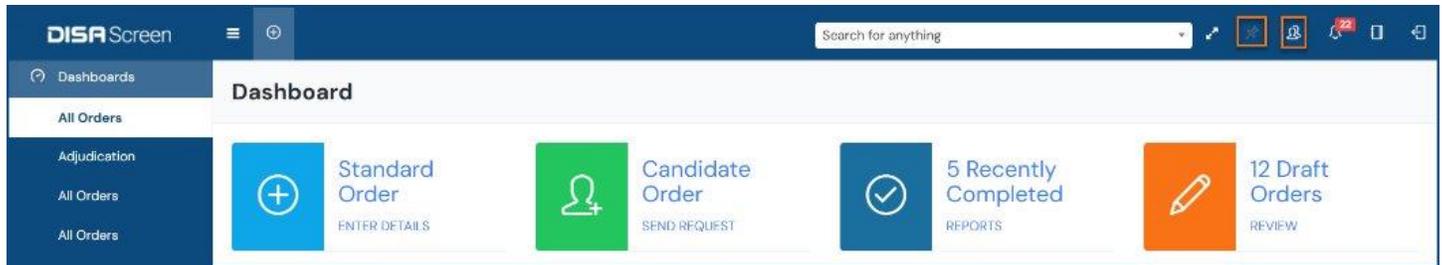
Search Bar & Notifications

1. Search Bar: quickly look up a report based on candidate order ID, name, DOB, SSN, phone, or reference code
2. Full screen mode
3. Notifications of recent report activity and alerts from DISA
4. Log out
5. Password Reset

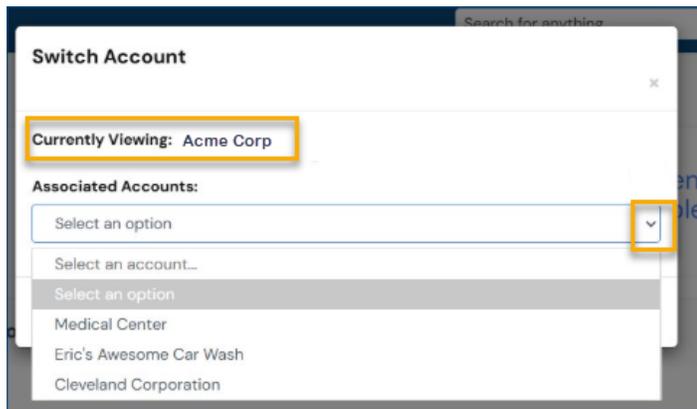


Accessing Multiple Accounts

Users may access multiple independent accounts if configured within DISAScreen. If your user account has this set up, you will see an additional icon in the top navigation.



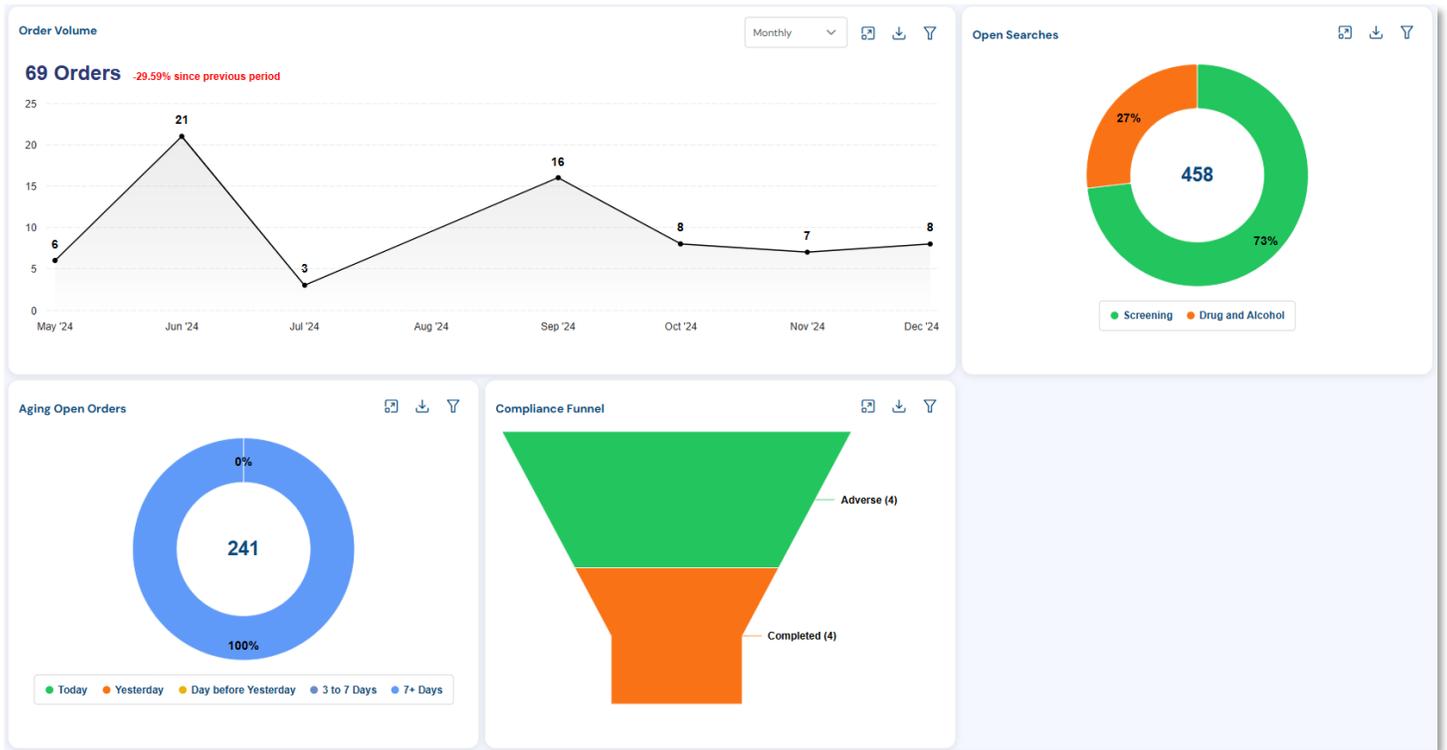
 - The Switch Account Icon will allow you to see which account you are currently viewing and/or switch to another associated account tied to your user profile. When you click another account to view, the system will refresh and display data and reports respectively.



 - Pin Account Icon will allow you to pin an account to be your default account used when you log in. The pin will turn green when a pinned account is activated.

Widgets

The widget system allows you to choose from predefined widgets that display analytics and data in an actionable way. You have configurability of your dashboard to choose which widgets you would like to see in addition to filter the data across all widgets. Save your dashboard configurations for easy future access anytime you log in.



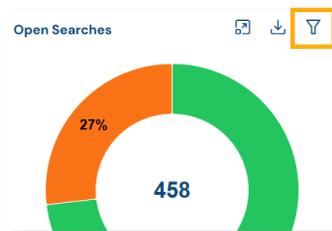
Global Widget Filters can be applied based on Organization, Package, or Submission Date. These filters will apply to every widget on your dashboard.

Widget Filters [Close Filters]

Filter By Client Organization: [Please Select]
 Filter By Client Package: [Please Select]
 Filter By Submission Date: Custom [X] [v]
 Selected Range: 05-01-2024 - 01-06-2025

[Clear All]

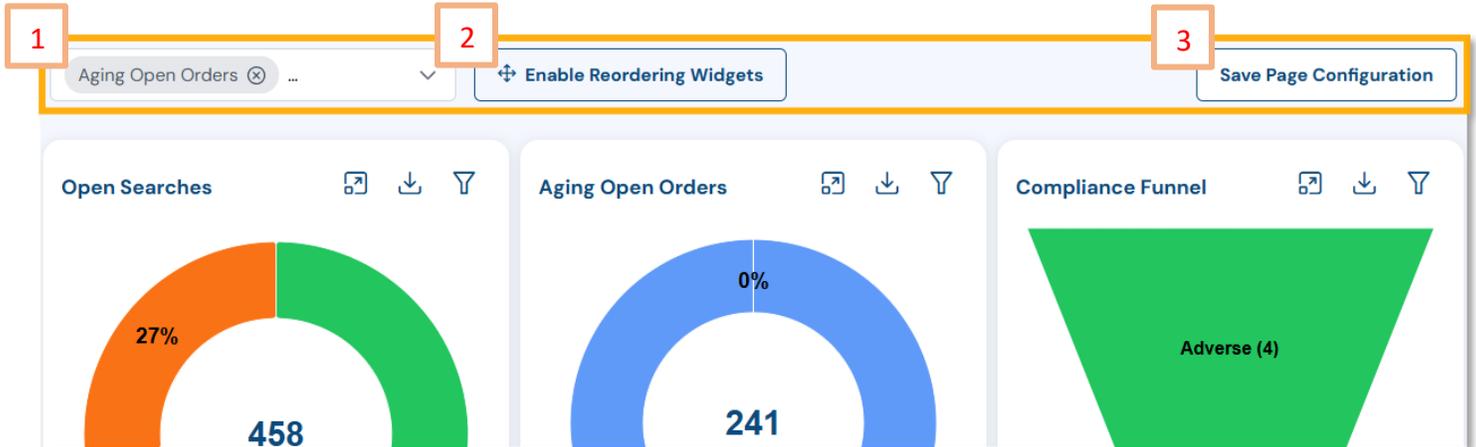
You may also apply filters to an individual widget by clicking its filter button.



To configure and save your widget layout, use this ribbon of buttons:

1. The dropdown menu allows you to select which widgets appear on your dashboard.

- The Enable Reordering Widgets button allows you to drag and drop them into your dashboard for a more customized layout.
- Click Save Page Configuration to keep this layout the next time you log in.

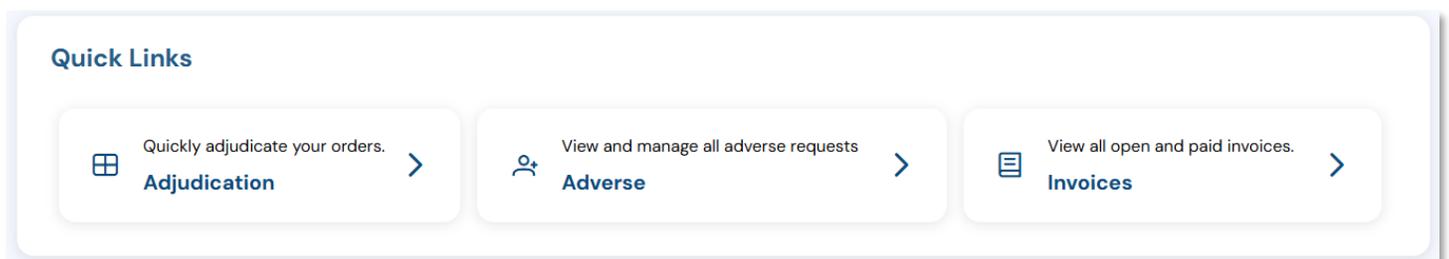


Widget Descriptions

- Adjudicating Status:** breakdown of orders grouped by their adjudication status, only visible to users with adjudication permissions.
- Aging Adjudication Orders:** count of orders pending adjudication grouped by their age, only visible to users with adjudication permissions.
- Aging Open Orders:** count of orders grouped by their age
- Candidate Completion Breakdown:** candidate requests by the time it took to complete
- Candidate Completion Time:** average time for candidates to complete requests
- Compliance Funnel:** groups orders by their result status, only visible to users with adverse action permissions
- Open Searches:** open searches grouped by their product hierarchy
- Order Volume:** count of orders created over time
- Pending Candidate Initiation:** candidate invites pending initiation by their status

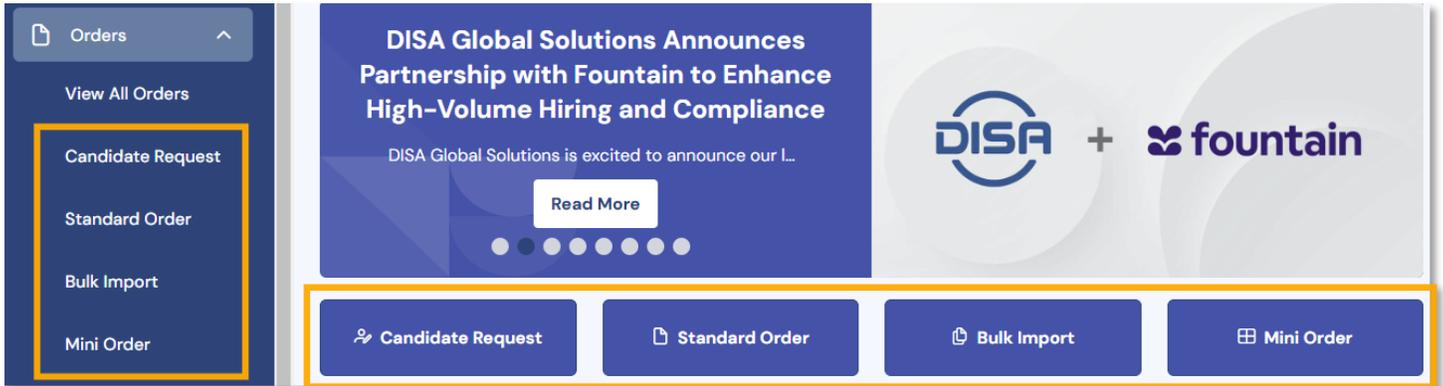
Quick Links

At the very bottom of your dashboard, you will find quick links to various modules based on your permissions. You might not see all options in the below screenshot:



Submitting Orders within DISA Screen

Users may have a variety of ways to place orders, depending on user permissions. Initiate an order using these options found in the navigation pane on the left, which are also found at the center of your home dashboard.



1. Candidate Request

Sends candidate email/text to complete the 'Candidate Experience'
Disclosures & Consents are collected electronically

2. Mini Order

Occ Health & Driving History products only
Minimal data is required (name, dob product info)

3. Bulk Import

Submit multiple candidate request orders at once by uploading a spreadsheet of candidate data
This will send Candidate Request links to each candidate (is not compatible with Standard Order)

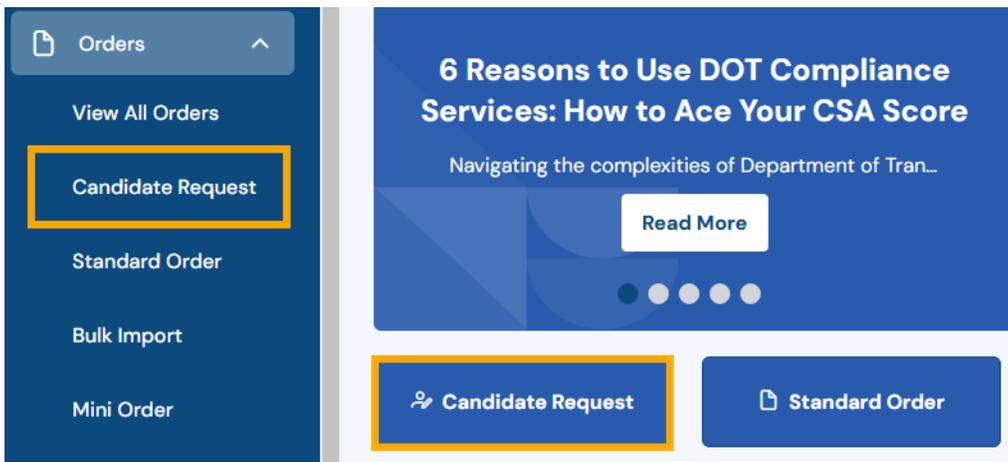
4. Standard Order

Candidate information is manually entered by the user
User is required to collect required disclosure & consents

Submitting a Candidate Request

From the home dashboard, click Candidate Request.

This will take you to the Candidate Order screen, asking for a small amount of candidate information to send them a link.



Candidate Request Details

- Complete any required fields
- Check the box at the bottom and click the blue 'Submit Order' button

Candidate Order

Candidate First Name* <input type="text" value="Legal first name"/>	Candidate Middle Name <input type="text" value="Legal middle name"/>	Candidate Last Name* <input type="text" value="Legal last name"/>
Delivery Method* <input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Text	Candidate Email Address* <input type="text" value="Valid email address"/>	Mobile Phone* <input type="text" value="(____) ____ - ____"/>
Branch* <input type="text" value="Select Branch"/>	Package* <input type="text" value="Select Package"/>	Additional Products

Certification

By checking the box below and clicking "Submit Order," I hereby request that a link to a consumer report ordering system be sent to the consumer. I certify that:

- The disclosure and authorization forms contained therein have been reviewed by my company and legal counsel and they satisfy all Fair Credit Reporting Act and other legal requirements, including the requirement that a disclosure be clear and conspicuous and contained in a document that consists solely of the disclosure;
- My order should not be processed before this written disclosure has been made to the consumer and his or her authorization obtained in writing;
- The report will not be used in violation of any applicable federal or state equal employment opportunity laws or regulations, and its use will comply with all applicable laws;
- The appropriate adverse action process will be followed, where applicable;
- This consumer report is being obtained for employment purposes; and
- We understand our obligations, have complied with, and will comply with all applicable laws pertaining to consumer reports and investigative consumer reports as defined in the Fair Credit Reporting Act as amended.

I certify and affirm the foregoing is true and correct.

Submit Order

Candidate Requests: Frequently Asked Questions

How to Resend Candidate Link & Update Email Address

If CX invite needs to be resent or email was entered incorrectly, follow below steps.

- Locate the candidate and click into the candidate profile.
- On the right side of the candidate order, under 'Actions' and click 'Resend Candidate Email'.
- Update email if needed and/or click 'Yes' to resend

Candidate: Test, Test			
Candidate Info:	Job	Candidate Order - Candidate Entry	Actions
DOB: N/A	Title: Not Provided	Order Id: 1712309	Resend Candidate Email
SSN: No SSN	Expected Salary: Not Provided	Organization: HR	Cancel Order
Address: No Address Provided	Position Location: Not Provided	Ordered By: Karla Ritter	
	Cost Center: None	Package: Pre-Hire Package	
		Created: 1/20/2023 1:16 PM	
		ETA: Unknown	



Resend Candidate Experience Invite?

You may correct the candidate email address below:

How to track individual candidate activity:

DISA Screen will track actions taken by Client users, candidates and DISA researchers.

- Locate the candidate's pending order, click their name to navigate to their order profile.
- Once inside the candidate's profile, click on 'Activities,' Here you will find actions taken on the order.

Details	Activities	Documents	Cost	
Activity History				
When	What	Who	Applies To	Details
1/3/2025 11:48 AM	Client Note	Jessica Guinn	Order (4169993)	Created candidate order. (Link: /candidate/start?oid=ef373bb2-94df-4489-bbb4-7351d252d235). Emailed to candidate at jessica.guinn@disa.com. Texted to candidate at 8652572298
1/3/2025 11:49 AM	Client Note	Candidate	Order (4169993)	Candidate logged in using PIN to complete order. (Details: 24.214.250.59, Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/131.0.0.0 Safari/537.36 Edg/131.0.0.0)
1/3/2025 11:49 AM	Client Note	Candidate	Order (4169993)	Candidate agreed to electronic signature usage. (Details: 24.214.250.59, Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/131.0.0.0 Safari/537.36 Edg/131.0.0.0)
1/3/2025 11:51 AM	Client Note	Candidate	Order (4169993)	Candidate submitted order. (Details: 24.214.250.59, Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/131.0.0.0 Safari/537.36 Edg/131.0.0.0). Candidate certified that they have: No additional names No additional addresses

The activities log will list the date and time the original email and reminder email were sent to the candidate. If the candidate has logged in, this will also be notated as in the above screen example.

How long does the candidate have before the link expires?

- Link expires on day 7 (this can be changed by DISA Support if needed)

Will the candidate receive a reminder email if they do not complete the link?

- Yes, a reminder email is sent on day 3 (this can be changed by DISA Support if needed)

How do I know once the applicant completes the request?

- You will receive an email alert (this can be changed by DISA Support if needed)

Candidate Request – Required Review

Although this is not the default process, you have the option of reviewing your candidates' information after they complete the Candidate Request link and before DISA begins processing the searches.

- Once the candidate has completed the CX request, the ordering user will receive an email notification.
- The user should then log into DISA Screen and navigate to the candidate's profile via:
 - Search bar at the top of your home dashboard
 - View All Orders dashboard.

Tip: on the View All Orders dashboard, orders that require your review will have an order status of 'Pending Client.' Filter your results by this status to quickly see which candidates need review prior to processing.

Order ID ↑↓	Order Result ↑↓	Candidate Full Name	Order Status ↑↓	Package ↑↓
4179117	PENDING	John Z Doe	Pending Client	Basic Pre-Employment

- Click on the candidate’s order ID to go the Order Review screen (final step before an order is submitted to DISA).
- Review order details prior to certifying and submitting to DISA.
 - If alias name(s) need to be removed, click the ‘x’ next to the AKA package name

Order Review: Tester, HR Renee

Item	Details	SubTotal
Pre-Hire Package Package: HR Tester		\$0.00
	SSN Trace (National) National Database (National) National Sex Offender (National) County Criminal (MONMOUTH, NJ) Statewide Criminal (NJ) OFAC (National)	
Aka Package: Megan Maiden x		\$19.00
	National Database (National) National Sex Offender (National) County Criminal (MONMOUTH, NJ) Statewide Criminal (NJ) OFAC (National)	
Product Instance Fees		
County Criminal: MONMOUTH NJ		\$0.00
County Criminal: MONMOUTH NJ		\$0.00
Statewide Criminal: NJ		\$0.00
Statewide Criminal: NJ		\$0.00
Current Cost*		\$0.00

*Additional court and/or third party fees may be applied.

- If the Candidate’s order requires edits, scroll to the bottom of the page and click “Edit Order”

Certification

By checking this box and clicking the "Submit Order" button to the right, I certify that:

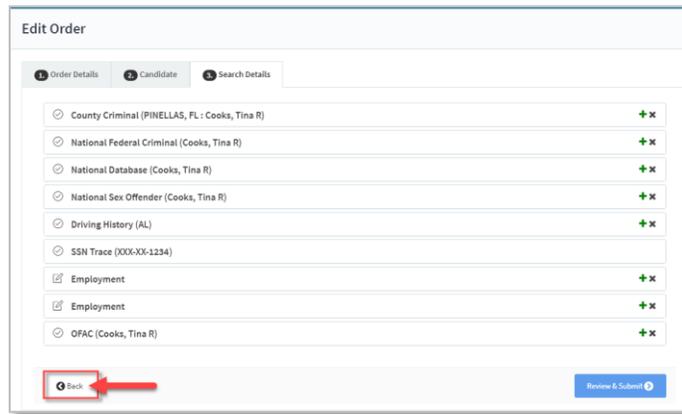
- I am requesting a consumer report for an employment purpose as defined under the Fair Credit Reporting Act and defined by the Federal Trade Commission.
- I further certify that a clear and conspicuous stand-alone disclosure, in a document consisting solely of the disclosure, has been made to the consumer.
- The disclosure satisfied all requirements identified in the Fair Credit Reporting Act and other applicable state laws, and is consistent with the Fair Credit Reporting Act Permissible Purpose indicated above.
- I have also obtained the written authorization of the consumer to conduct a background check. I certify that I will also comply with the adverse action requirements of the Fair Credit Reporting Act and applicable state laws.
- I agree to abide by all equal employment opportunity laws when using any consumer report information.

I agree to the certification above

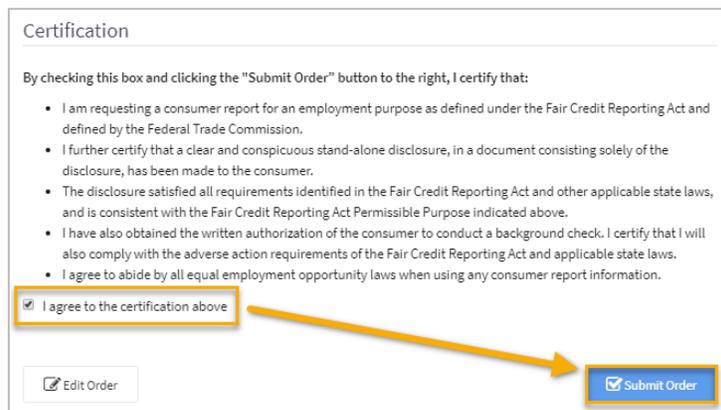
[Edit Order](#) [Submit Order](#)

You must agree with user certification

- Navigate through the order using the white “Back” and blue buttons to make edits



- **If everything listed on the order is approved or after you complete any edits**
 - Click "I agree to the certification above" and click "Submit Order"



Submitting a Mini Order

A Mini Order is used only for MVR – Driving History reports or Occupational Health products.

From the home dashboard, click 'Mini Order.'



Mini Order Details

Required fields will display, depending on product selected.

Mini Order

Branch* Industrial	Package* No Package	Additional Products	SHOPPING CART <table><thead><tr><th>Item</th><th>Quantity</th><th>Total</th></tr></thead><tbody><tr><td colspan="3">Additional Products</td></tr><tr><td>5 Panel (Urine) – Candidate Registration</td><td>1</td><td>\$36.23</td></tr><tr><td>Current Price*</td><td></td><td>\$36.23</td></tr></tbody></table> <p><small>*Additional sales tax, court and/or third party fees may be applied.</small></p>	Item	Quantity	Total	Additional Products			5 Panel (Urine) – Candidate Registration	1	\$36.23	Current Price*		\$36.23
Item	Quantity	Total													
Additional Products															
5 Panel (Urine) – Candidate Registration	1	\$36.23													
Current Price*		\$36.23													
Candidate First Name* John	Candidate Middle Name Legal middle name	Candidate Last Name* Doe													
Candidate Email Address* john.doe@email.com	Date of Birth 01/01/1980														
Cost Center ABC	Billing Code 123														
Occupational Health Info															
Reason for Drug Test* Pre-Employment															

Review and Submit:

Certification

By checking the box below and clicking "Submit Order," I hereby request that a link to a consumer report ordering system be sent to the consumer. I certify that:

- The disclosure and authorization forms contained therein have been reviewed by my company and legal counsel and they satisfy all Fair Credit Reporting Act and other legal requirements, including the requirement that a disclosure be clear and conspicuous and contained in a document that consists solely of the disclosure;
- My order should not be processed before this written disclosure has been made to the consumer and his or her authorization obtained in writing;
- The report will not be used in violation of any applicable federal or state equal employment opportunity laws or regulations, and its use will comply with all applicable laws;
- The appropriate adverse action process will be followed, where applicable;
- This consumer report is being obtained for employment purposes; and
- We understand our obligations, have complied with, and will comply with all applicable laws pertaining to consumer reports and investigative consumer reports as defined in the Fair Credit Reporting Act as amended.

I certify and affirm the foregoing is true and correct.

Submit Order

Submitting a Standard Order

From the home dashboard, click 'Standard Order.'



Standard Order Details [Tab 1]

The screenshot shows the 'Create Order' form with three tabs: '1. Order Details', '2. Candidate', and '3. Search Details'. The 'Order Details' tab is active. It contains two sections: 'Package Information' and 'Position Information'. The 'Package Information' section has three fields: 'Branch *' (dropdown with 'Select Branch'), 'Package *' (dropdown with 'Select Package'), and 'Additional Products'. The 'Cost Center' field is a dropdown with 'Select one'. The 'Position Information' section has three fields: 'Title' (text input with 'Position title'), 'Expected Salary Range' (dropdown with 'Select Salary Range'), and 'Position Location (City, State)' (dropdown). A 'Continue' button is at the bottom right.

- Required fields identified by the red asterisk *
- Clicking 'Continue' will bring you to tab 2, Candidate Information

Candidate Information [Tab 2]

The screenshot shows the 'Candidate' tab in a web application. The form is divided into several sections:

- Name Fields:** Legal First Name (James), Legal Middle Name (No middle name provided), Legal Last Name (Dean), and Suffix.
- Address Fields:** Address (1 Main St), Address Line 2 (Optional - Apartment, Suite, Unit), ZIP code (33901 (FORT MYERS, FL, LEE)), City (FORT MYERS), and State (Florida).
- Personal Information:** Date of Birth (01/01/1980) and Social Security Number (123-45-6789).
- Contact Information:** Phone Number (9999-999-9999 Ext 99999), Email (test@test.com), and Can Contact? (checked).
- Additional Fields:** 'Additional Names Used/Alias' and 'Previous Addresses' sections, each with an 'Add' button.
- Navigation:** 'Back', 'Save Draft', and 'Continue' buttons at the bottom.

On the right side, there is a 'SHOPPING CART' section with a table:

Item	Quantity
Package (Pre-Hire Package)	
County Criminal	
National Database	
National Sex Offender	
SSN Trace	

- Complete required fields and click on “Continue” to navigate to tab 3, Search Details

Search Details [Tab 3]

Look through the selected product summaries here. Some searches may require additional information. For Example, MVRs require the driver license number.

The screenshot shows the 'Search Details' tab. The main area contains a list of selected products with checkboxes and expand/collapse icons:

- National Database (Smith, Jane D) [+ x]
- National Sex Offender (Smith, Jane D) [+ x]
- 2 Statewide Criminal (Smith, Jane D) [+ x]
- Statewide Criminal (Smith, Jane D: MO) [x]
- Statewide Criminal (Smith, Jane D: AR) [x]
- FACIS - Level 1M (Smith, Jane D) [+ x]
- SSN Trace (XXX-XX-6789)

At the bottom, there are 'Back', 'Save Draft', and 'Review & Submit' buttons.

On the right side, there is a 'SHOPPING CART' section with a table:

Item	Quantity	Total
Package (Missouri Non-Licensed Package)		
FACIS - Level 1M		
National Database		
National Sex Offender		
SSN Trace		
Statewide Criminal		
Additional Products		
Statewide Criminal	1	
Product Instance Fees		
Statewide Criminal: AR		
Statewide Criminal: MO		
Current Price*		

Order Review Page

This will be the final step before an order is submitted to DISA researchers.

- Review the order on the Order Review Page

Order Review: Smith, John		
Order Details		
Item	Details	SubTotal
Nurse Package Package: John Smith		\$115.00
	County Criminal (PINELLAS, FL) National Database (National) National Sex Offender (National) MVR - Driving History (AL) Employment (Walmart) Education (University of Minnesota - Twin Cities) Professional License ()	
Product Instance Fees		
MVR - Driving History: AL		\$10.50
Current Cost*		\$125.50

*Additional court and/or third party fees may be applied.

- Add notes and documents to the order by clicking on **Notes and Documents**

[Notes and Documents](#)

Certification

By checking this box and clicking the "Submit Order" button to the right, I certify that:

- I am requesting a consumer report for an employment purpose as defined under the Fair Credit Reporting Act and defined by the Federal Trade Commission.
- I further certify that a clear and conspicuous stand-alone disclosure, in a document consisting solely of the disclosure, has been made to the consumer.
- The disclosure satisfied all requirements identified in the Fair Credit Reporting Act. All other required disclosures under other applicable state and local laws were also provided.
- I have also obtained the written authorization of the consumer to conduct a background check. I certify that I will also comply with the adverse action requirements of the Fair Credit Reporting Act and applicable state laws.
- I agree to abide by all equal employment opportunity laws when using any consumer report information.

I agree to the certification above

[Notes and Documents](#)

Activity History

When	What	Who	Applies To	Details

Add Note

Comment

Activity comment

All Documents

When	Type	File	Uploaded By	Applies To
9/14/2020 10:55 AM	Release	TEST.docx	Training User	Order

Add Document

Document Type

Release

File

No file chosen

- Edit Order
 - To go back and edit the order for any reason, you can click on the white "Edit Order" button
- Certification of FCRA requirements should be read and confirmed by clicking the checkbox
 - Once you agree to the terms, the "Submit Order" button will darken and allow you to click

Certification

By checking the box below and clicking "Submit Order," I hereby request that a link to a consumer report ordering system be sent to the consumer. I certify that:

- The disclosure and authorization forms contained therein have been reviewed by my company and legal counsel and they satisfy all Fair Credit Reporting Act and other legal requirements, including the requirement that a disclosure be clear and conspicuous and contained in a document that consists solely of the disclosure;
- My order should not be processed before this written disclosure has been made to the consumer and his or her authorization obtained in writing;
- The report will not be used in violation of any applicable federal or state equal employment opportunity laws or regulations, and its use will comply with all applicable laws;
- The appropriate adverse action process will be followed, where applicable;
- This consumer report is being obtained for employment purposes; and
- We understand our obligations, have complied with, and will comply with all applicable laws pertaining to consumer reports and investigative consumer reports as defined in the Fair Credit Reporting Act as amended.

I certify and affirm the foregoing is true and correct.

Submit Order

Order Submitted Page

- Once you have completed the order you can:
 - Click on the order number to see the order you just placed
 - Click "Create Another" to start a new order
 - Click "Done" to go back to your dashboard

Submitting an A La Carte Order

Searches can be ordered a la carte via the same Standard Order process above.

- Select Standard Order from your dashboard
- Select your branch first, then in the Package list select 'No Package'
- Click 'Additional Products'

The screenshot shows a web interface with three tabs: '1. Order Details', '2. Candidate', and '3. Search Details'. The 'Search Details' tab is active. Below the tabs is a section titled 'Package Information'. It contains two dropdown menus: 'Branch*' with 'Industrial' selected, and 'Package*' with 'No Package' selected. To the right of these dropdowns is a button labeled 'Additional Products' which is highlighted with a yellow border.

- Find the product you want to add and click "Add" next to it
- When you have all the products you want, select "Update Products"

The screenshot shows a modal window titled 'Additional Products' with a close button (X) in the top right corner. At the top right of the modal is a search box labeled 'Search:' containing the text 'mvr'. Below the search box is a table with the following content:

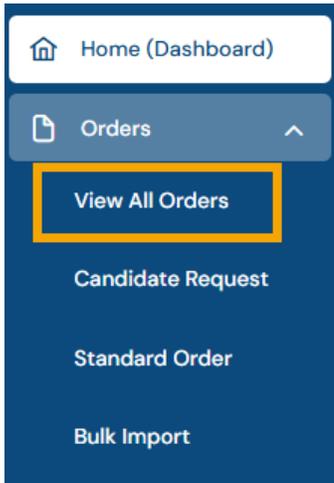
Product Name	
<input type="button" value="Add"/>	MVR - Driving History

At the bottom of the modal are two buttons: 'Cancel' and 'Update Products'.

- Complete order like normal from there, putting in the candidate information, etc.

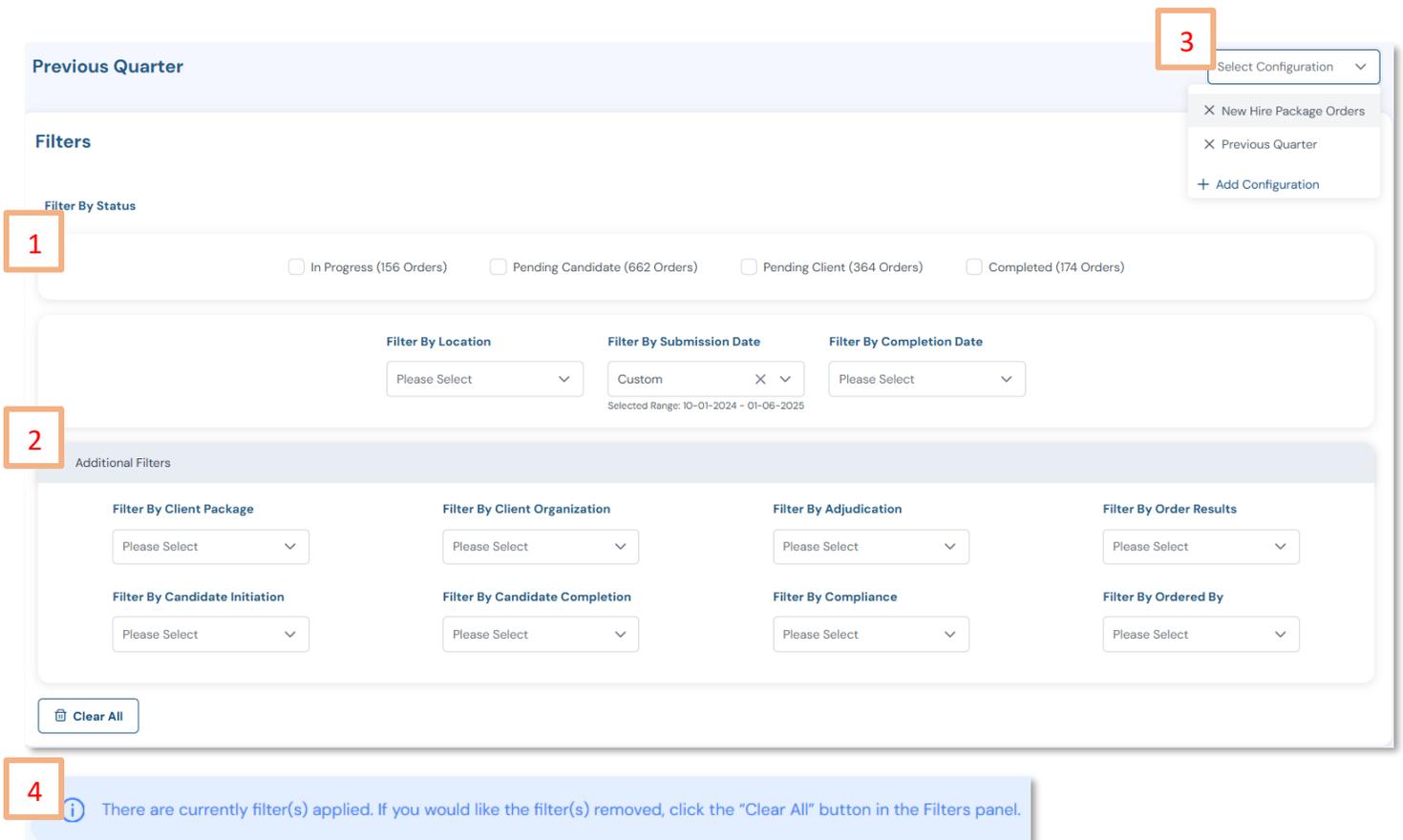
Viewing Your Orders

To view your orders, click Orders in the navigation pane to expand the ordering options and click View All Orders.



Orders: Filters & Configurations

1. The order list has default filtering capability, similar to your home dashboard widgets. You might see less filters depending on your access permissions.
2. Additional filters, found in a collapsible panel, give you even more control over your data
3. Different filter configurations can be saved and reloaded upon future visits.
4. A blue notification bar will alert you when any filters are in use.

A screenshot of the 'Orders: Filters & Configurations' interface. At the top right, a 'Select Configuration' dropdown is highlighted with a red box labeled '3'. Below it, a list of configurations includes 'New Hire Package Orders' and 'Previous Quarter'. The main 'Filters' section has a 'Filter By Status' row with four radio buttons: 'In Progress (156 Orders)', 'Pending Candidate (662 Orders)', 'Pending Client (364 Orders)', and 'Completed (174 Orders)'. This row is highlighted with a red box labeled '1'. Below that are three filter sections: 'Filter By Location' (Please Select), 'Filter By Submission Date' (Custom, Selected Range: 10-01-2024 - 01-06-2025), and 'Filter By Completion Date' (Please Select). A red box labeled '2' highlights the 'Additional Filters' section, which contains eight filter dropdowns: 'Filter By Client Package', 'Filter By Client Organization', 'Filter By Adjudication', 'Filter By Order Results', 'Filter By Candidate Initiation', 'Filter By Candidate Completion', 'Filter By Compliance', and 'Filter By Ordered By'. At the bottom left, a 'Clear All' button is visible. A blue notification bar at the bottom is highlighted with a red box labeled '4', containing an information icon and the text: 'There are currently filter(s) applied. If you would like the filter(s) removed, click the "Clear All" button in the Filters panel.'

Orders: Summary and Order Age

Directly below your filters, you will see the total number of orders currently visible based on the applied filters, the percentage of the total number of orders on your account, as well as the age.



Orders: Search, Sorting, & Column Options

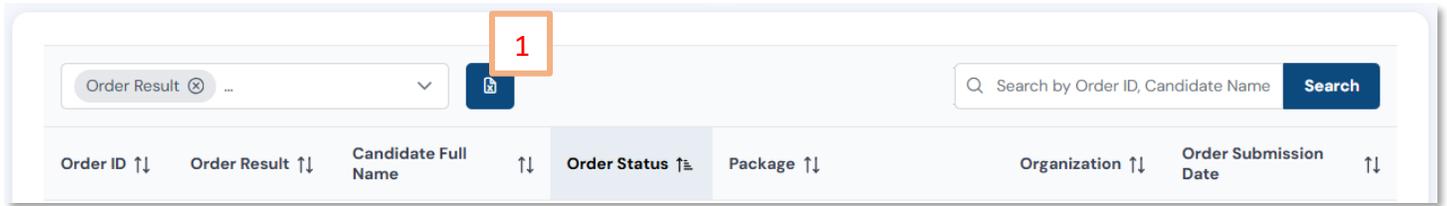
1. This dropdown gives you the ability to choose which columns you would like to see
2. Search by Order ID or candidate name
3. Click a column header to filter to sort in descending order. Click it again to sort in ascending order.

The table shows a list of orders with columns for Order ID, Order Result, Candidate Full Name, Order Status, Package, Organization, and Order Submission Date. Annotations 1, 2, and 3 are placed on the interface: 1 points to a dropdown menu, 2 points to a search bar, and 3 points to the 'Order ID' column header.

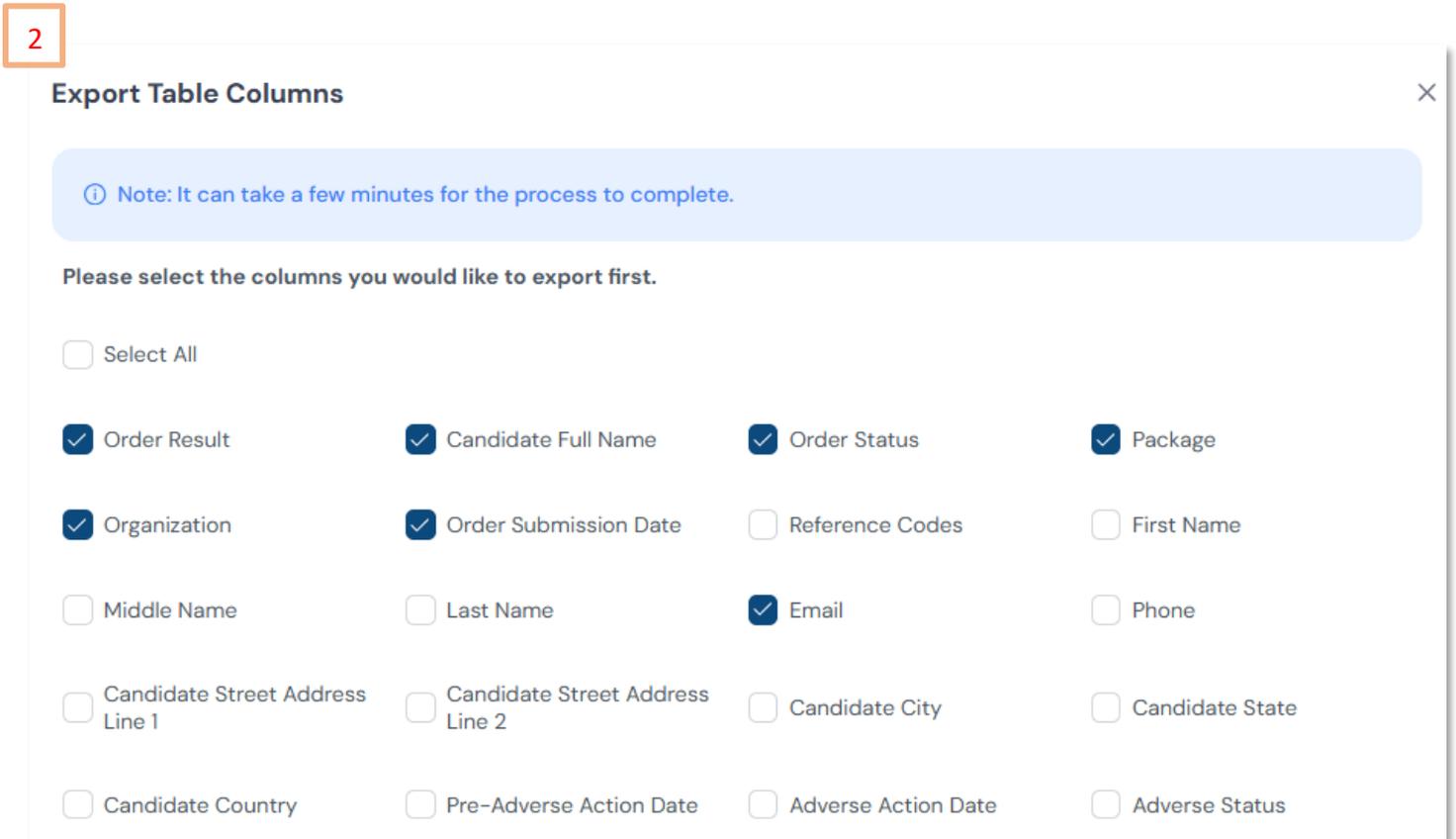
Order ID ↑↓	Order Result ↑↓	Candidate Full Name ↑↓	Order Status ↑↓	Package ↑↓	Organization ↑↓	Order Submission Date ↑↓
4162085	PENDING	Candidate Test		Basic Package	HR	12/31/2024
3710300	REVIEW	Barney Test	Completed	Basic Package	East	10/02/2024
3802786	COMPLETED	Test Shelby	Completed	Basic Package	South	10/02/2024
4053715	REVIEW	Daniel T Tester	Completed	Standard Package (Driving Positions)	Safety	12/02/2024
3908943	PENDING	JEremy Tester	In Progress		HR	10/16/2024
3908982	PENDING	Dangerous Danny	In Progress		HR	10/16/2024

Orders: Exporting

1. This button allows you to export the order list to excel.
2. You can choose which columns of data to include in your export or select all.
3. Choose the number of rows to export or select all.



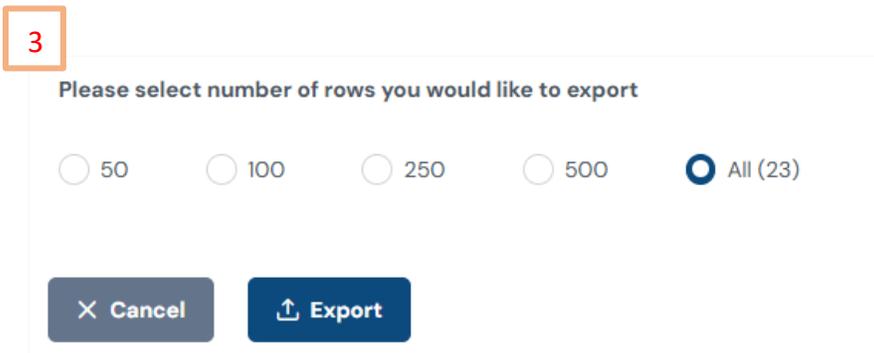
The screenshot shows the top of a table with several columns: Order ID, Order Result, Candidate Full Name, Order Status, Package, Organization, and Order Submission Date. A search bar is located on the right. A red box labeled '1' highlights a blue export button (represented by a document icon) located between the search bar and the table header.



The screenshot shows a dialog box titled "Export Table Columns" with a close button (X) in the top right corner. A blue information bar at the top states: "Note: It can take a few minutes for the process to complete." Below this, the text reads: "Please select the columns you would like to export first." There are several checkboxes for column selection:

- Select All
- Order Result
- Candidate Full Name
- Order Status
- Package
- Organization
- Order Submission Date
- Reference Codes
- First Name
- Middle Name
- Last Name
- Email
- Phone
- Candidate Street Address Line 1
- Candidate Street Address Line 2
- Candidate City
- Candidate State
- Candidate Country
- Pre-Adverse Action Date
- Adverse Action Date
- Adverse Status

A red box labeled '2' is positioned around the "Export Table Columns" title.



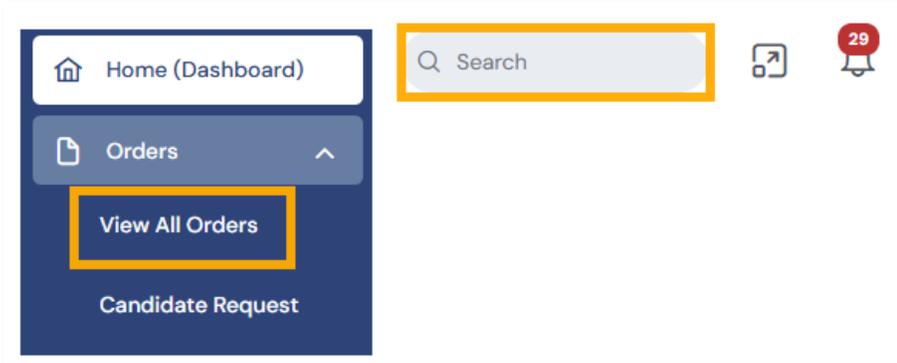
The screenshot shows a dialog box titled "Please select number of rows you would like to export". It contains five radio button options: 50, 100, 250, 500, and All (23). The "All (23)" option is selected. At the bottom, there are two buttons: "Cancel" and "Export". A red box labeled '3' is positioned around the title.

Managing Your Results

Candidate Profile & Results

Locating a candidate profile can be done multiple ways:

- View All Orders dashboard
- Search bar at the top of your main dashboard



From the View All Orders dashboard, click the search ID to open the candidate profile.

A screenshot of a table titled 'Order Result' with a search icon. The table has four columns: 'Order ID', 'Order Result', 'Candidate Full Name', and 'Order Status'. The first row shows '3802786' (highlighted with a yellow box), 'COMPLETED', 'Test Shelby', and 'Completed'. The second row shows '3270804', 'PENDING', 'Chandler Bing', and 'Pending Client'.

Order ID ↑↓	Order Result ↑≡	Candidate Full Name ↑↓	Order Status ↑↓
3802786	✓ COMPLETED	Test Shelby	Completed
3270804	⌛ PENDING	Chandler Bing	Pending Client

Each profile will provide a summary of the candidate's information at the top, available actions, tabs containing certain details, and a link to the final background results.

1. Candidate Information
2. Actions (these will change depending on the candidate's status)
3. Details Tab
4. Activities Tab
5. Documents Tab
6. Cost Tab
7. Link to Final Results

1 **Candidate: Shelby, Test** **2**

Candidate Info: DOB: 01/01/XXXX SSN: XXX-XX-0000 Address: 123 fake street DERRY, NH 03038 US	Job Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Cost Center: ABC - 123 Billing Code: None	Candidate Order - Completed Order Id: 3802786 Organization: South Ordered By: Sam McMahon Package: Basic Package Created: 9/23/2024 1:16 PM Completed: 10/2/2024 10:14 AM	Actions Unarchive Order New Order for Candidate Initiate Adverse Action Readjudicate Order Initiate I-9/E-Verify
---	---	--	--

3 **4** **5** **6**

7 **Order Complete**
[View Background Screen Report](#)

Candidate Profile: Details Tab

This tab provides a summary of which searchers and areas were run on the candidate and the date they were completed. To view the full results, click the blue View Background Screen Report button.

*Note, you may see multiple buttons for different types of products such as background screen, occ health (drug testing), or credit reports.

Details **Activities** **Documents** **Cost**

Order Complete
[View Background Screen Report](#)

Searches

[Filter these searches](#)

Search ID	Product	Details	Name	Status	Completed Date	Additional Information
20257500	National Database	National	Shelby, Test	Complete	10/2/2024 10:08 AM	None
20257501	National Sex Offender	National	Shelby, Test	Complete	10/2/2024 10:08 AM	None
20257502	SSN Trace		Shelby, Test	Complete	9/27/2024 11:01 AM	None
20257503	Statewide Criminal	NH	Shelby, Test	Complete	10/2/2024 10:14 AM	None

Showing 1 to 4 of 4 entries

Candidate Profile: Activities Tab

The activities tab will track actions taken by both Client users, candidates and DISA researchers. Date and time are both stamped for each researcher update, including ETAs and attempts made, as well as any client-placed notes.

Details	Activities	Documents	Cost	
Activity History				
When	What	Who	Applies To	Details
9/21/2021 5:24 AM	Client Note	Requesting User	Order (509393)	S State is MA.
9/21/2021 4:33 PM	Client Note	Researcher	Statewide Criminal MA (2701768)	The CORI form has not been uploaded for this candidate. Please provide a completed CORI release at your earliest convenience. Thank you!
9/23/2021 10:57 AM	Client Note	Researcher	Education Medfield Senior High School (2723008)	Faxed a request to Records; pending a 2-3 business day turnaround upon receipt of request.
9/27/2021 12:37 PM	Client Note	Researcher	Education Medfield Senior High School (2723008)	Left a voicemail with Guidance at the number provided on the school website.

Candidate Profile: Documents Tab

The documents tab provides a link to all disclosure/release forms signed by the candidate as well as any documents that have been uploaded by you and DISA Researchers. E-Passports for drug test registration will also be available here.

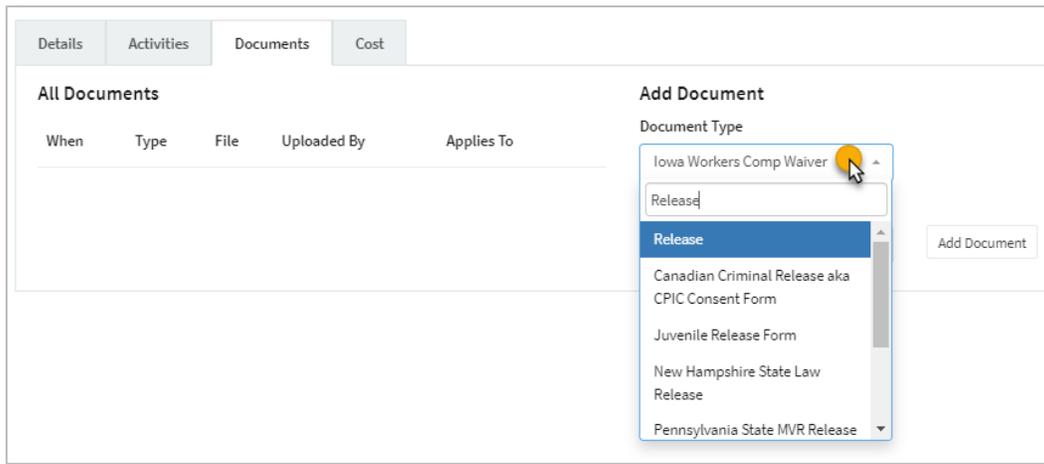
Details	Activities	Documents	Cost	
All Documents				
When	Type	File	Uploaded By	Applies To
9/23/2024 1:17 PM	Document	Consumer Report Disclosure.pdf		Order
9/23/2024 1:17 PM	Document	Disclosure Regarding "Investigative Consumer Report" Background Investigation.pdf		Order
9/23/2024 1:17 PM	Document	Notice Regarding Background Checks Per California Law.pdf		Order
9/23/2024 1:18 PM	Document	State, County & Municipal Notices.pdf		Order
9/23/2024 1:18 PM	Document	Acknowledgement and Authorization for Consumer Report.pdf		Order
10/2/2024 10:09 AM	Document	NH State Police CRA Form.pdf		Order

Add Document

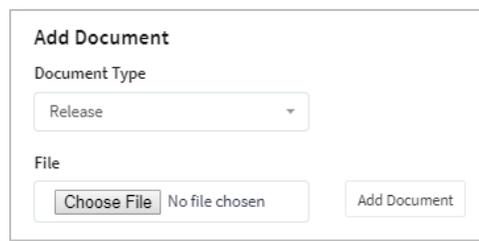
Document Type

File
 No file chosen

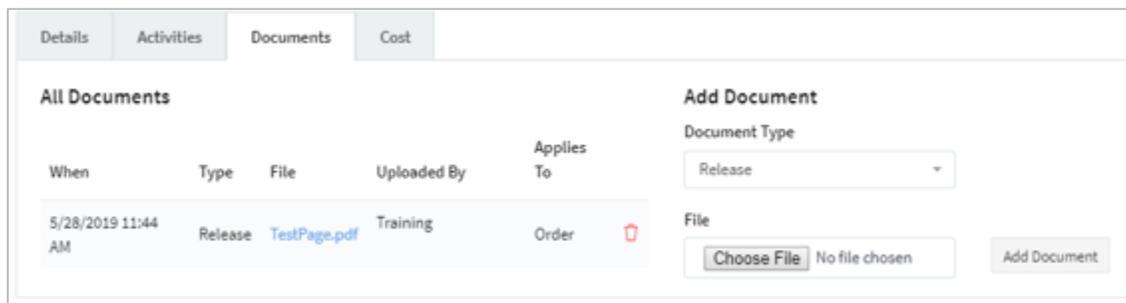
To upload a document, click on the Document Type drop-down menu and choose the name of the document. If it doesn't appear on the list, you can type in the name of the document.



Next, choose the file and find the document on your computer.



Click on the “Add Document” button & the document will appear on the left attached to the order



- The system will post the time of the upload, the document type (the name you gave/selected), the file name (and link), and who uploaded the document
- If you made a mistake on the upload, the red trash icon will remove the document from the order

Candidate Profile: Downloading Documents

Based on user access, documents are available to view or download via the Documents tab on the candidate profile.

- Locate the candidate order
- Click on 'Documents' tab then onto the document you want to view

Candidate: [Simon, Carly](#)

Candidate Info:
 DOB: 02/02/XXXX
 SSN: XXX-XX-5555
 Address: 123 Fake Street
 FORT MYERS, FL 33913 US

Job
 Title: Not Provided
 Expected Salary: Not Provided
 Position Location: Not Provided
 Reference Code-Selenium-DONOTCHANGE: None
 Locations: None

Candidate Order - Submitted
 Order Id: 183048
 Organization: Medical Center
 Ordered By: Johnny Gilapsi
 Package: Support Staff Package
 Created: 3/2/2021 12:54 PM
 Completed: 3/3/2021 3:31 PM

Actions
[Request Status Update](#)
[New Order for Candidate](#)
[Add Search](#)

Details Activities Documents Cost

All Documents

When	Type	File	Uploaded By	Applies To
3/2/2021 12:55 PM	Document	Disclosure.pdf		Order
3/2/2021 12:55 PM	Document	Investigative Disclosure.pdf		Order
3/2/2021 12:56 PM	Document	California Disclosure.pdf		Order
3/2/2021 12:56 PM	Document	Authorization.pdf		Order
3/2/2021 1:03 PM	State-Specific Release	Example State Release.docx		Order
3/2/2021 1:07 PM	Client Added Doc	Example Client Doc.docx	Johnny Gilapsi	Order
3/2/2021 1:14 PM	Client facing from GHRR	Example Candidate Doc.docx		Order

Add Document

Document Type: Iowa Workers Comp Waiver

File: Choose File No file chosen Add Document

Candidate Profile: Cost Tab

If a user has permission to see cost, they may use the Cost tab to view a breakdown of the total order cost. This includes the base package price, any a la carte products that may have been added to the order, and any state/county fees listed as a “product instance fee.”

Details	Activities	Documents	Cost	
Current Order Cost				
SearchId	Type	Name	Details	Total
	Order Fee	Package	Basic Package	\$13.00
21097859	Package Product	National Database	National	
21097860	Package Product	National Sex Offender	National	
21097861	Package Product	SSN Trace	National	
21097862	Package Product	Statewide Criminal	NH	
21097863	A La Carte Product	5 Panel (Urine) - Alere Candidate	PreEmp	\$26.50
21097862	Product Instance Fee	Statewide Criminal - Reportable: NH		\$26.25
Total:				\$65.75

Adding Searches to an Existing Order

Adding searches to an existing order should only be done in the event you forgot to add a product to the original order, such as an education verification to a standard package.

You will need to run a new / complete background check on someone who previously applied and is applying again.

To add searches to the existing order, follow these steps below

- Locate the candidate and open their profile
- On the right of the order header, there will be a link for 'New Order for Candidate' for packages, or 'Add Search' for a la carte items

Add Search: Add Products to an Existing Order

Adding searches to a report within DISA Screen can be done while an order is in progress or completed. If the order is in progress, searches can be added any time. If an order is complete, the user will only have 7 business days from the date the order is completed, to add searches.

- Click the "Add Search" link on the Order Level

Candidate: Fernandez, Donnie A	Job	Standard Order - Submitted	Actions
Candidate Info: DOB: 06/21/XXXX SSN: XXX-XX-1234 Address: 123 Main Street NEW PORT RICHEY, FL 34655	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code: OCH01	Order Id: 2195 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Medical Professional Package Created: 10/23/2018 11:22 AM ETA: 10/26/2018 11:23 AM	Request Status Update New Order for Candidate Add Search

Click "Select Products"

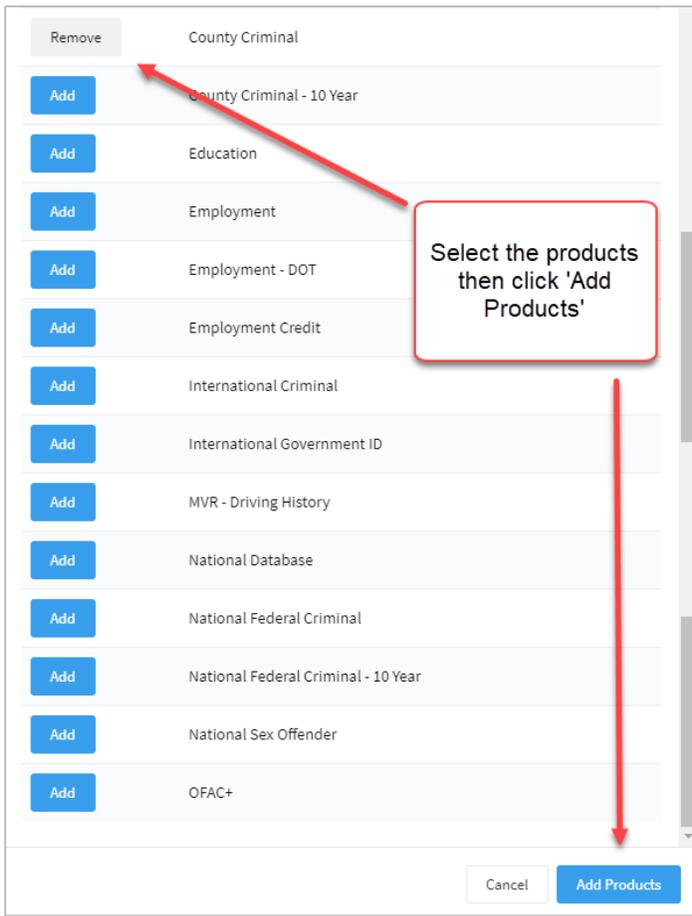
Add Searches to Order #74736

Select Products

Search Details

No products selected.

- In the window that opens, select all products that you need to add
- Click "Add Products"



- Fill in any required fields
 - **Example:** For MVR, enter in the driver’s license information
- Click ‘Add Searches’
 - After you click add searches, any selected products will populate to the order

Add Search: Create a Whole New Order for a Candidate

This will create a completely new order for this individual - You MUST be positive this is the same person before using this process.

A ‘Standard Order’ will be initiated using this function. Ensure the Consent forms were captured during that initial Candidate order or have them uploaded in the new order.

- Click the ‘New Order for Candidate’ link on the Order Level

Candidate: Fernandez, Donnie A		Standard Order - Submitted	Actions
Candidate Info:	Job	Order Id: 2195	Request Status Update
DOB: 06/21/XXXX	Title: Not Provided	Organization: Medical Center	New Order for Candidate
SSN: XXX-XX-1234	Expected Salary: Not Provided	Ordered By: Johnny Gilapsi	Add Search
Address: 123 Main Street	Position Location: Not Provided	Package: Medical Professional Package	
NEW PORT RICHEY, FL 34655	Reference Code: OCH01	Created: 10/23/2018 11:22 AM	
		ETA: 10/26/2018 11:23 AM	

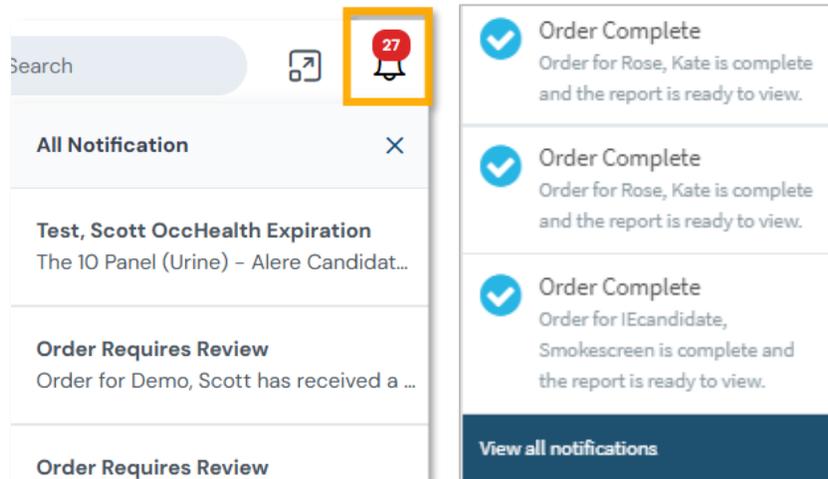
- Candidate information from original order will auto-populate and create a new order
- Follow the Standard Ordering process from there

System/Order/DISA Notifications

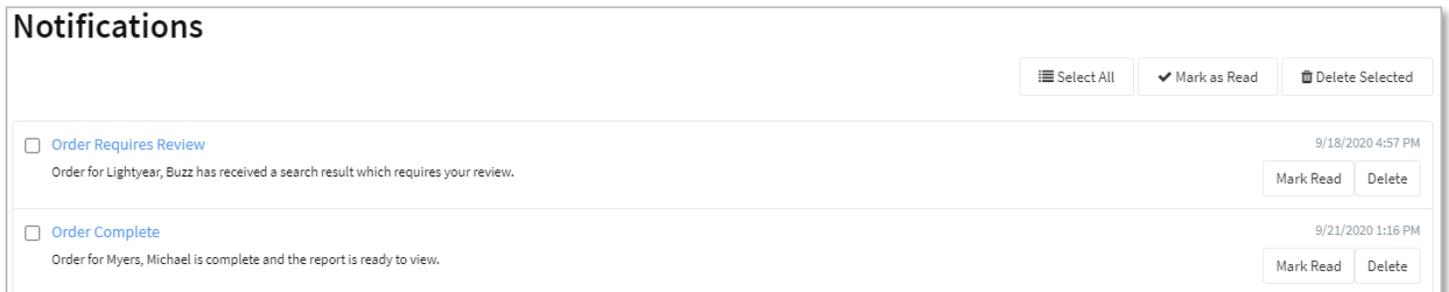
Where will I see DISA notifications like court closures or when an order is complete?

The bell on the right side of your top blue menu bar will indicate system and order-related items.

- When you click on the bell, a short list will open with a summary of what notifications have been received



- You can click on the “View all notifications” at the bottom which will take you to the Notifications inbox screen. As with standard email inboxes, you will have the ability to delete old notifications.



If setup with email notifications, you will also receive emails for the following alerts:

Types of Notifications	Details of Notification
Completed Orders	Email notification when an order is completed
Order needs information to proceed	User will receive an email that a specific order needs to information <ul style="list-style-type: none"> • Example: Release is needed, Fee approval, etc.
Candidate Order - link Expired	User will receive an email that a link is going to expire for a candidate. <ul style="list-style-type: none"> • User can initiate a new order for the candidate.
Candidate Order completed - ready for review	If your company is setup to review candidate links, user will receive an email that the order has been completed by the candidate. The order requires you to review the order before submitting to DISA for processing.

Request Status Update

How do I request a status update on an order that is in progress?

Status requests can be done on orders that are in progress when a user is looking for an update on an order or specific product. This type of communication goes directly to the researchers working on the products requested. DISA's team will respond with proper updates once they review the request.

Candidate Info:	Job	Standard Order - Submitted	Actions
DOB: 06/21/XXXX SSN: XXX-XX-1234 Address: 123 Main Street NEW PORT RICHEY, FL 34655	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code: OCH01	Order Id: 2195 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Medical Professional Package Created: 10/23/2018 11:22 AM ETA: 10/26/2018 11:23 AM	Request Status Update New Order for Candidate Add Search

- Click on 'Request Status Update'
 - Pop up appears to select what you want to request a status update on
- If you want to have an update on the Entire order, leave the Applies To field as 'Entire order'
 - **NOTE:** Using Entire Order will generate an email to the DISA Support team who will review the overall order and respond to your inquiry via email.
- Type in the Additional Information box your message to DISA and click 'Send message'

Request Status Update

In order for us to best service this request, please provide as much information as possible.

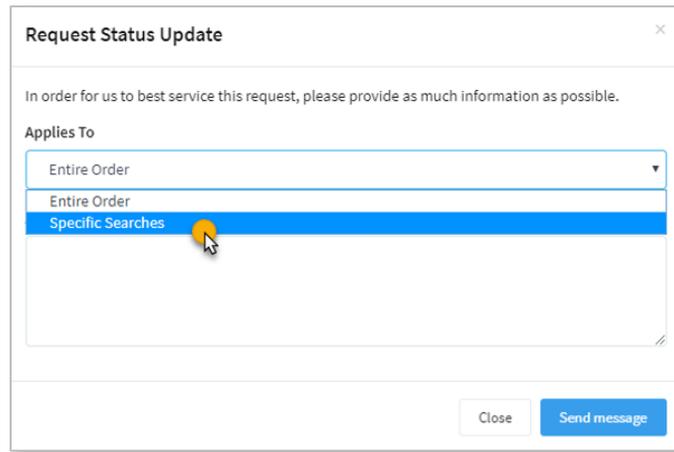
Applies To

Entire Order

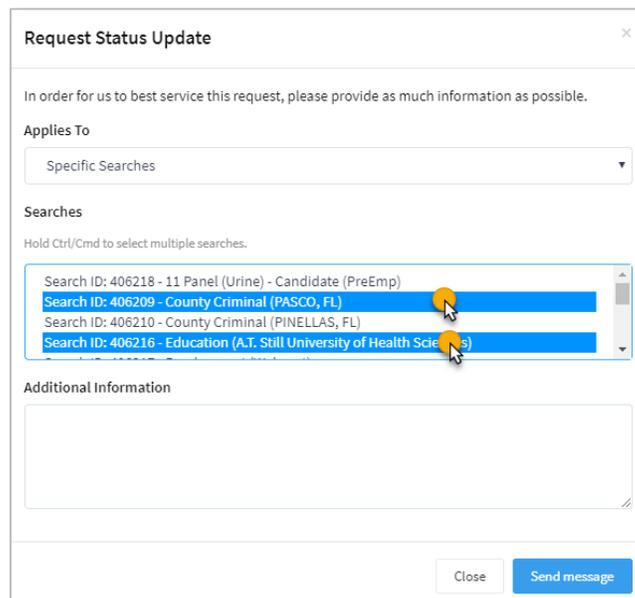
Additional Information

Close Send message

- If you want a status update on 1 or more searches, click on the applies to drop down and select 'Specific Searches'
 - **NOTE:** Using Specific Searches will add an activity to the order and alert the researcher working on that search. The researcher will review and respond to your inquiry via the Activities tab on your order.



- Select the search you want to request a status update
- To select multiples, after selecting the first one, hold down the Ctrl button on your keyboard and click the other searches you wish to request a status update on

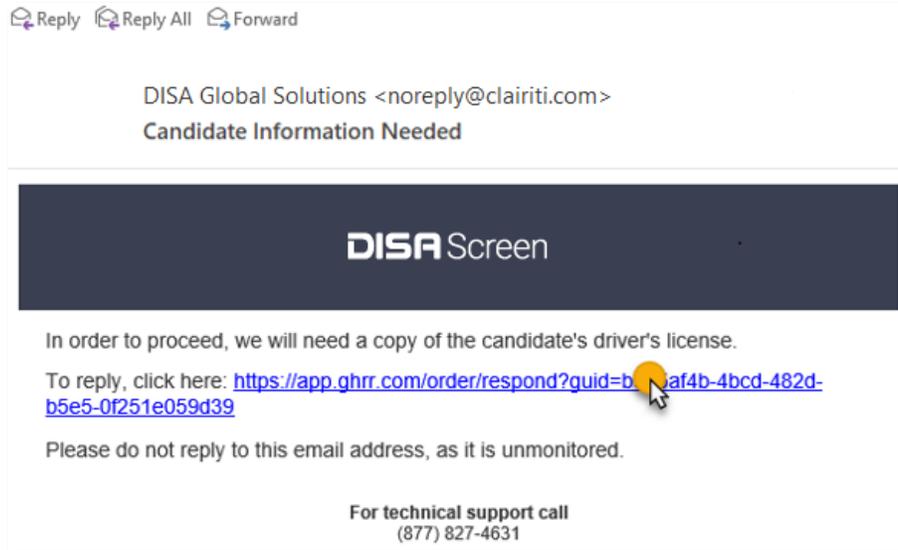


- Type in the Additional Information box your message to DISA and click 'Send message'

Responding to DISA via secure email

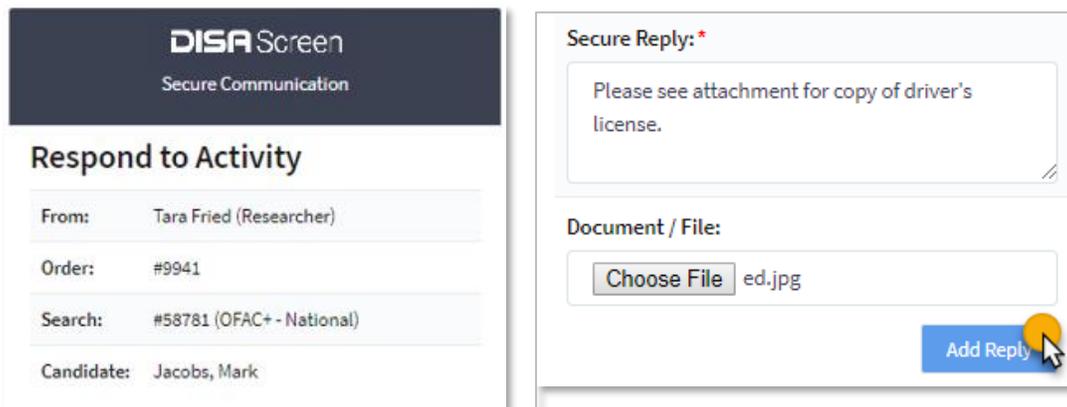
You will occasionally receive an email that requests assistance from your office for the researcher to complete a report. This could be the candidate's hand-signed release, their education documents, international identification, etc.

In this example, the researcher is requesting a copy of the driver's license:



To reply:

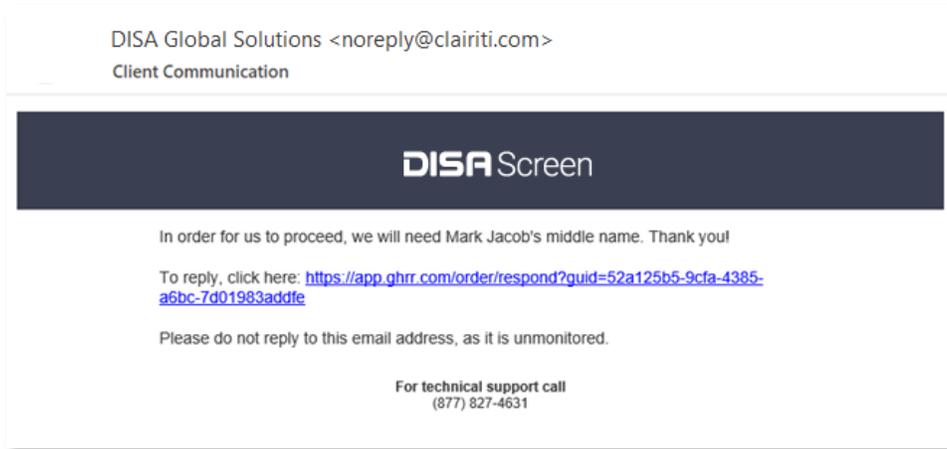
- Click on the link
- The secure link will provide you information about the order, and give you a place to add a comment and the document requested



- Type your response and upload the file requested and click "Add Reply"
- You will receive a confirmation that it was sent to the researcher

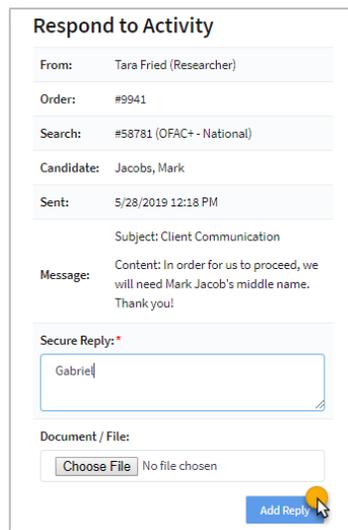


In this next example, the researcher is requesting the candidate's middle name



To reply:

- Click the link
- The secure link will provide you information about the order and give you a place to add a comment



- Type your response, and click "Add Reply"
- You will receive a confirmation that it was sent to the researcher



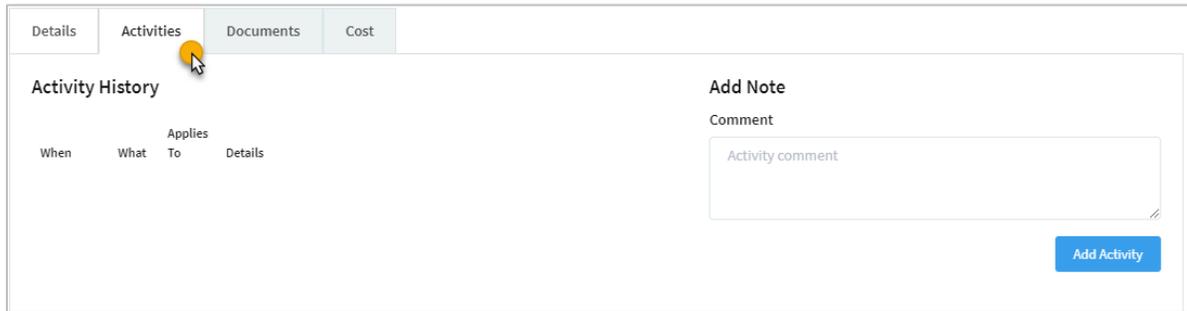
If you do not want to pass the information on through the secure email, you may also log into DISA Screen and respond on the Order level in the candidate profile.

Adding Notes in DISA Screen

Notes can be added by any user who has access to the order. These notes will be visible to Client users and DISA users but are typically used when you want to simply add a comment to an order.

NOTE: Placing a note in this manner will not alert your DISA Screen Support or Researchers. To do so, please see the Request Status Update section.

- Select the candidate order in which you want to add a note.
- Click on the “Activities” tab

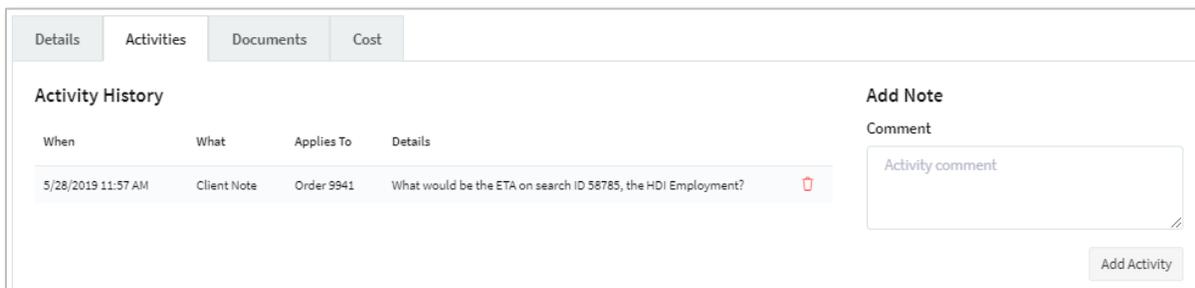


The screenshot shows the 'Activities' tab selected in the top navigation bar. Below the tabs, there is an 'Activity History' table and an 'Add Note' section. The 'Add Note' section contains a text input field labeled 'Activity comment' and a blue 'Add Activity' button.

When	What	Applies To	Details

Add Note
Comment
Activity comment
Add Activity

- Click into the field labeled “Comment”
- Once you have your entire comment typed out, click the button “Add Activity”



The screenshot shows the 'Activities' tab selected in the top navigation bar. Below the tabs, there is an 'Activity History' table and an 'Add Note' section. The 'Add Note' section contains a text input field labeled 'Activity comment' and a greyed-out 'Add Activity' button. The 'Activity History' table now contains one entry.

When	What	Applies To	Details
5/28/2019 11:57 AM	Client Note	Order 9941	What would be the ETA on search ID 58785, the HDI Employment?

Add Note
Comment
Activity comment
Add Activity

Viewing Completed Results

Viewing Report

Locate the order you wish to review and navigate to the candidate profile.

- You will land on the details view of the candidate profile. This view will provide a quick glance of results.
- To view specific details, click into the final report you would like to view (background, occ health, etc.)

Candidate: Simon, Carly

Candidate Info:	Job	Candidate Order - Submitted	Actions
DOB: 02/02/2000 SSN: XXX-XX-5555 Address: 123 Fake Street FORT MYERS, FL 33913 US	Title: Not Provided Expected Salary: Not Provided Position Location: Not Provided Reference Code-Selenium-DONOTCHANGE: None Locations: None	Order Id: 183048 Organization: Medical Center Ordered By: Johnny Gilapsi Package: Support Staff Package Created: 3/2/2021 12:54 PM Completed: 3/3/2021 3:31 PM	Request Status Update New Order for Candidate Add Search

Details | Activities | Documents | Cost

Order In Progress

[View Background Screen Report](#) [View OccHealth Report](#)

Searches

Search ID	Product	Details	Name	Status	Additional Information	
1023022	County Criminal	LEE, FL	Simon, Carly	Complete	None	View Results
1023018	National Database	National	Simon, Carly	Complete	None	View Results
1023019	National Sex Offender	National	Simon, Carly	Complete	None	View Results
1023020	Statewide Criminal	FL	Simon, Carly	Complete	None	View Results
1023021	SSN Trace		Simon, Carly	Complete	None	
1032336	Education	University of Central Florida	Simon, Carly	In Progress	We'll do our best to expedite this request.	
1048119	5 Panel (Urine)	Pre-Employment	Simon, Carly	Complete	None	View Results

Identifying and Viewing Discrepancies

Discrepancies in the final report indicate adverse information that might disqualify the candidate from your hiring criteria, depending on your company's standards. These call for careful consideration before moving forward with the candidate and are identified in several locations:

1. On your View All Orders dashboard, under the Order Result column. A 'Review' status indicates a discrepancy.
2. On the candidate profile under the Details tab. A small, orange 'eye' would indicate a discrepancy.
3. Within the final report by the orange 'eye' icon. You can click on the icon and the system will take you to the search details, outlining the discrepancies found.

1

Order Result (x) ...

Order ID ↑↓	Order Result ↓↑	Candidate Full Name ↑↓	Order Status ↑↓	Package ↑↓
3710300	REVIEW	Barney Test	Completed	Basic Package
4053715	REVIEW	Daniel T Tester	Completed	Standard Package (Driving Positions)
3270804	PENDING	Chandler Bing	Pending Client	Pre-Hire Package
3908943	PENDING	JJeremy Tester	In Progress	
3908982	PENDING	Dangerous Danny	In Progress	

2

Search ID	Product	Details	Name	Status
19771038	National Database	National	Test, Barney	Complete
19771039	National Sex Offender	National	Test, Barney	Complete
19771040	SSN Trace		Test, Barney	Complete
19771041	Statewide Criminal	NH	Test, Barney	Complete 

3

 Results should be reviewed.

Search ID	Search Type	Name Searched	Results	Adjudicate	Completed Date
19771038	National Database - National	Test, Barney	No Reportable Record	Not Adjudicated	10/2/2024 10:08 AM
19771041	Statewide Criminal - NH	Test, Barney	Record	Not Adjudicated	10/2/2024 10:13 AM 
19771039	National Sex Offender - National	Test, Barney	No Reportable Record	Not Adjudicated	10/2/2024 10:08 AM
19771040	SSN Trace - National	Test, Barney	Complete - No Info	Not Adjudicated	9/5/2024 3:30 PM

Showing 1 to 4 of 4 entries < Previous 1 Next >

Criminal & Public Records

Jurisdiction: NH		Record Type: Statewide Criminal - Reportable		Name on Case: Barney Test	
Case Number	Charge	Charge Date	Charge Type	Disposition	Disposition Date
14681887	Theft	01/01/2010	Misdemeanor	Guilty	01/01/2019

Identifiers: First Name, Last Name **Sentence Info:** Not provided.

Print & Download PDF Results

While viewing the final results, you can view a PDF copy or print the results by using these buttons at the top of the screen. The 'Order Profile' button will take you back to the candidate profile.

 Order Profile

 View PDF

 Print Report

Adverse Action

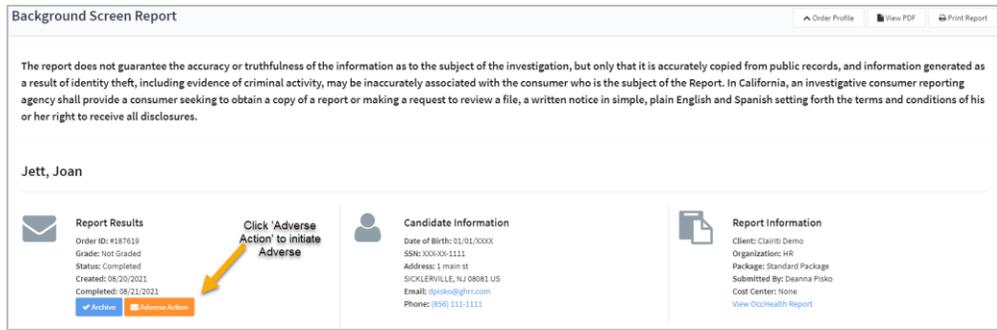
What if I have decided not to hire a candidate?

Under FCRA regulations, if an adverse hiring decision is made based on part or in whole due to information provided to you by DISA you must provide candidate with the opportunity to respond by initiating an Adverse Action Letter.

Adverse Action functionality will only appear to users with proper permissions in DISA Screen.

Where to initiate Adverse

To initiate an Adverse Action; User must have proper access rights. Adverse Action will only appear when the order is fully complete and by clicking into the final background report.



Adverse Flows

Clients are responsible for initiating both pre-adverse and final adverse action letters via DISA Screen's Compliance Dashboard.

Adverse Flow

Once adverse is selected candidate address and email will appear for confirmation/editing if needed. Click 'Initiate' when ready.

The screenshot shows the 'Initiate Adverse Action' form. It prompts the user to review candidate address information for Feliz, Jordan. The form includes fields for Address (9090 Harrow Rd), Line 2, City (FORT MYERS), State (FL), and Zip (33912). An 'Initiate' button is visible at the bottom left.

Confirming Charges

For jurisdictions that do require the reason that adverse is being initiated; the user initiating adverse will be prompted to select the reason, prior to being able to 'initiate' adverse.

Initiate Adverse Action Process

Please review the required candidate information to initiate adverse action process for Stone, Bonnie.

1 Confirm / Update Address

Address * 987 River Road Line 2

City * DORCHESTER CENTER State * Massachusetts Zip * 02124

In order to initiate the adverse action process for this candidate, you must specify criminal record(s) underlying reasons for potential denial, if no criminal records apply, provide reasons in the "Other Reasons" text box.

2 Select Charge or enter other reason for adverse

Criminal & Public Records

Jurisdiction: SUFFOLK, MA Record Type: County Criminal Name on Case: Bonnie Stone

Case Number	Charge	Charge Date	Charge Type	Disposition	Disposition Date
<input type="checkbox"/> 987654	DUI	05/05/2017	Misdemeanor	Guilty	05/20/2017
Identifiers: First Name, Last Name, DOB, Partial SSN		Sentence Info: Not provided.			
<input type="checkbox"/> 123456789	DUI	09/08/2018	Misdemeanor	Adjudicated Guilty	09/11/2018
Identifiers: First Name, Last Name, DOB		Sentence Info: Not provided.			

Other Reasons

3 Click 'Initiate' when ready

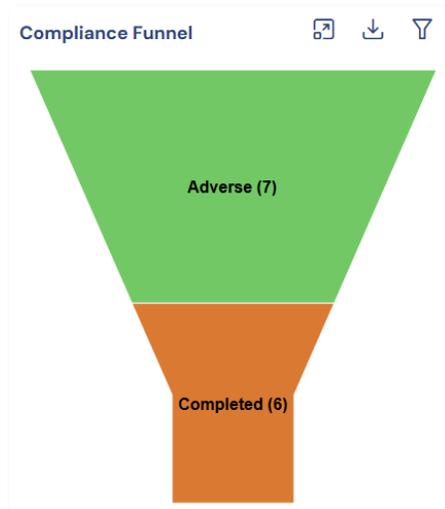
Initiate

Identifying Orders in Adverse

Users with access to the Compliance Funnel widget and the Adverse Dashboard will have the ability to view, manage and cancel adverse. You will also know if the order is in adverse from the candidate profile.

Compliance Funnel Widget

You may use this widget on your home dashboard to monitor how many candidates are in the adverse process. Click on the two different 'Adverse' or 'Completed' sections to open the list of those candidates.



Adverse Dashboard

The Adverse Dashboard can be accessed from the very bottom of the home dashboard or from the Compliance section in the left-hand navigation pane.

Quick Links

Quickly adjudicate your orders. >
Adjudication

View and manage all adverse requests >
Adverse

View all open and paid invoices. >
Invoices

- Home (Dashboard)
- Orders
- Compliance
- Adjudication
- Adverse Action**

This dashboard will house all orders with in-process or recently completed adverse action. Users are required to monitor this dashboard and initiate the final adverse letter via DISA Screen when ready.

Only users with access to the Adverse Dashboard will have the ability to view and manage adverse orders.

Compliance

5 Pending Final Adverse
IN PROGRESS

0 Recent Actions
ACTIONS

Pending Final Adverse | In Progress

Show 25 entries Filter these orders

Candidate	Package	Pre-Adverse Status	Action Date	Waiting Period	Adverse Status	Action Date	
guinn, jessica	Basic Criminal Background Package	Completed	10/17/2024 10:51 AM	82 / 7 Days	Manual Email	10/24/2024 10:51 AM	Cancel Send Adverse Email
DISA, Stephanie JoJo	Basic Criminal Background Package	Completed	10/17/2024 2:17 PM	82 / 7 Days	Manual Email	10/24/2024 2:17 PM	Cancel Send Adverse Email

Sending Final Adverse

The client user will initiate the final adverse letter to the candidate when ready, based on FCRA, jurisdictional timing, or company guidelines.

DISA Screen will display the number of days that have passed since the pre-adverse action letter was sent. The waiting period column on the dashboard contains this information.

***The button to send the final adverse email to the candidate will not appear until 7 days have passed after sending the initial pre-adverse notice.**

Waiting Period	Adverse Status	Action Date	
20 / 7 Days	Manual Email	12/25/2024 2:05 PM	Cancel Send Adverse Email
22 / 7 Days	Manual Email	12/23/2024 3:42 PM	Cancel Send Adverse Email

Sending Final Adverse: When ready to send the Final Adverse letter, the user will click 'Send Adverse Email'

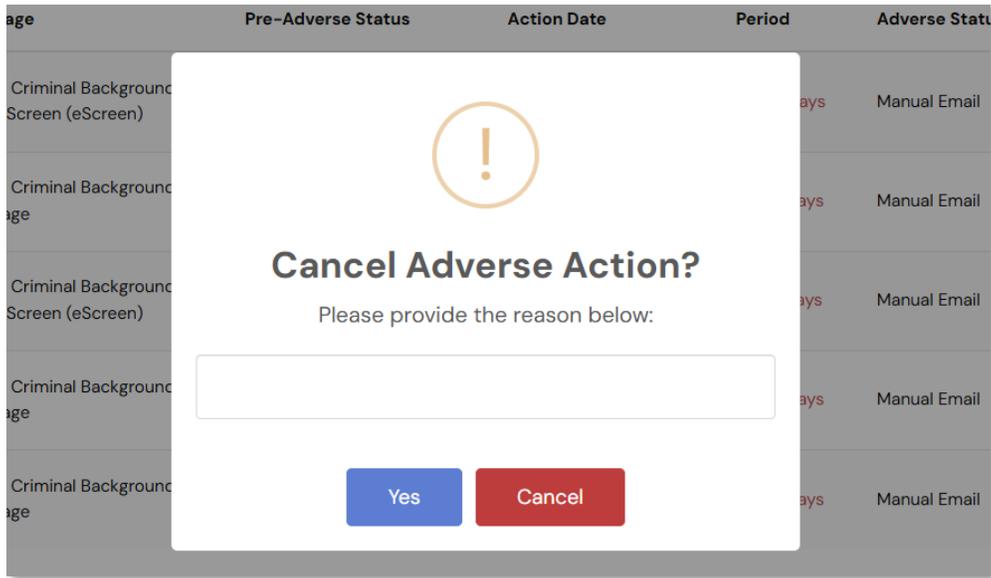
Waiting Period	Adverse Status	Action Date	
20 / 7 Days	Manual Email	12/25/2024 2:05 PM	Cancel Send Adverse Email
22 / 7 Days	Manual Email	12/23/2024 3:42 PM	Cancel Send Adverse Email

Cancel Adverse

Should the user obtain additional detail from the candidate and determine that they would like to cancel adverse, the user will click on 'Cancel' to the right of the candidate's name to stop the final adverse from sending.

Waiting Period	Adverse Status	Action Date	
20 / 7 Days	Manual Email	12/25/2024 2:05 PM	Cancel Send Adverse Email
22 / 7 Days	Manual Email	12/23/2024 3:42 PM	Cancel Send Adverse Email

Once the user clicks 'Cancel' the below item will appear, requiring the user to provide a reason to cancel & ability to cancel.

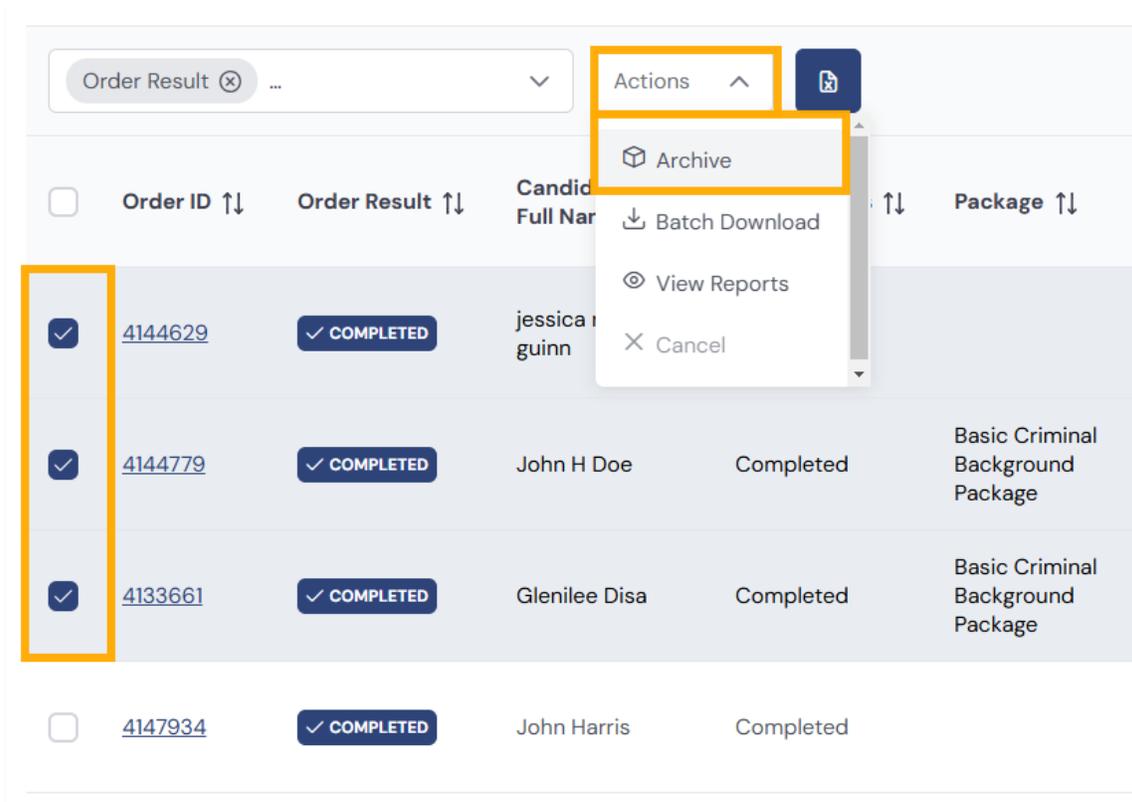


Archiving & Downloading Reports

Archiving Reports

To archive a single report or multiple reports from the View All Orders dashboard, check the box to the left of the candidate's information. Then use the Actions dropdown to select Archive.

*Note: only completed reports can be archived. You cannot archive pending reports.



The screenshot shows a dashboard with a table of reports. The table has columns for Order ID, Order Result, Candidate Full Name, and Package. Three rows are highlighted with a yellow box, indicating they are selected. The 'Actions' dropdown menu is open, showing options: Archive, Batch Download, View Reports, and Cancel. The 'Archive' option is highlighted with a yellow box.

<input type="checkbox"/>	Order ID ↑↓	Order Result ↑↓	Candidate Full Name	Package ↑↓
<input checked="" type="checkbox"/>	4144629	✓ COMPLETED	jessica guinn	
<input checked="" type="checkbox"/>	4144779	✓ COMPLETED	John H Doe	Completed Basic Criminal Background Package
<input checked="" type="checkbox"/>	4133661	✓ COMPLETED	Glenilee Disa	Completed Basic Criminal Background Package
<input type="checkbox"/>	4147934	✓ COMPLETED	John Harris	Completed

Locating Archived Reports

To find an archived report, use the search bar at the top of your dashboard.



The screenshot shows the top navigation bar of the dashboard. The search bar is highlighted with a yellow box. To the right of the search bar are icons for a document with an arrow, a notification bell with a red circle containing the number 31, a right-pointing arrow, and a user profile icon.

Downloading Reports

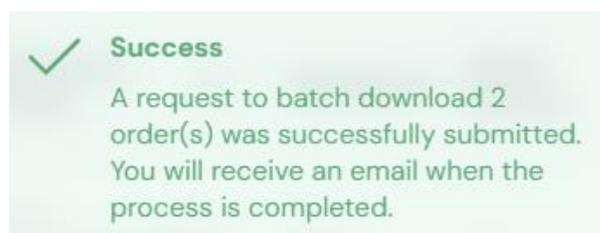
To download copies of multiple completed reports, from the View All Orders dashboard check the box to the left of the candidate's information. Then use the Actions dropdown to select Download.

*Note: only completed reports can be downloaded. You cannot download pending reports.

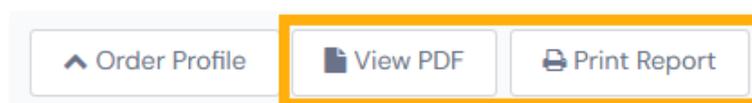
The screenshot shows a table with columns: Order ID, Order Result, Candidate Full Name, and Package. Three rows are selected, indicated by checked checkboxes in the first column. An 'Actions' dropdown menu is open, showing options: Archive, Batch Download, View Reports, and Cancel. The 'Batch Download' option is highlighted. The table data is as follows:

Order ID	Order Result	Candidate Full Name	Package
<input checked="" type="checkbox"/> 4144629	✓ COMPLETED	jessica guinn	
<input checked="" type="checkbox"/> 4144779	✓ COMPLETED	John H Doe	Basic Criminal Background Package
<input checked="" type="checkbox"/> 4133661	✓ COMPLETED	Glenilee Disa	Basic Criminal Background Package
<input type="checkbox"/> 4147934	✓ COMPLETED	John Harris	Completed

You will see a pop-up alert and receive an email shortly containing the selected reports



You can also download a report while viewing the completed results. At the top of the screen, use either of these two buttons to view/download a PDF copy of the report.



Ordering Occupational Health, Drug Screens, & 'Alere' Products

Registering donors

There are two ways to register a donor for occ health products in DISA Screen:

1. Candidate/Donor will register themselves
2. Ordering user will register the donor within the DISA Screen platform

Registration Method: Donor Self-Registers

All **Proactive** (Pre-Employment) tests should go through the donor self-registration process (candidate self-registers).

- Anytime users order for the candidate self-registration process to occur, the user must select the products that state **"Candidate"**
- **Example:** 10 Panel (Urine) – Alere Candidate

Registration Method: Client Registers on Donor's Behalf

Users can register a donor and provide registration to them directly.

- Anytime users order a for cause occ health product the user must select the products that state **"Client"**
- **Example:** 10 Panel (Urine) – Alere Client

Clinic Selection and Account Setup

Lab Selection & Settings

- Clinic locations will populate based on configurations below, which can be updated by DISA Support if needed
 - **Radius:** 25 miles
 - **Donor Registration Expiration:** 3 days
 - **Donor Collection Expiration:** 3 days

Donor Registrations

Donor registrations can be done via candidate and standard order.

- Candidate Request: Only utilizes packages, not a la carte ordering. Select a package that includes occ health / drug screening products and the candidate will register at a lab of their choice.
- Standard Order: Can utilize packages or a la carte ordering.
 - Registering on candidate's behalf: choose a 'Client' product
 - Candidate registers at a clinic of their choice: choose a 'Candidate' product.

Product Name	
5 Panel (Urine) – Alere Candidate	Add
5 Panel (Urine) – Alere Client	Add

***Note: when ordering a drug screen within a package via Candidate Request, the donor will always self-register regardless of which product (Client vs Candidate registration) is included. The only way for a user to register on the candidate's behalf is to use the 'Standard Order' method and select a 'Client' product.**

Candidate Request – Pre-Employment Drug Screen

The candidate will go through the candidate experience to sign disclosure forms and provide background information. Once that is complete, the below will occur:

Donor Registration Email: Donor will receive the below email. The branding and verbiage of this email can be customized by DISA if needed.



Location Finder: Once link is clicked, the below window will appear, requesting donors zip code

The image shows a window titled "Welcome!" with the following text:

Medical Center needs you to register for Occupational Health Services. This process must be completed by Wednesday, May 26 at 1:40 PM Eastern Standard Time. Please enter your information below to locate a convenient collection facility.

Below the text is a text input field containing the placeholder text "Please enter your zip" and a blue button labeled "Go".

Location: Donor will select the nearest convenient location.

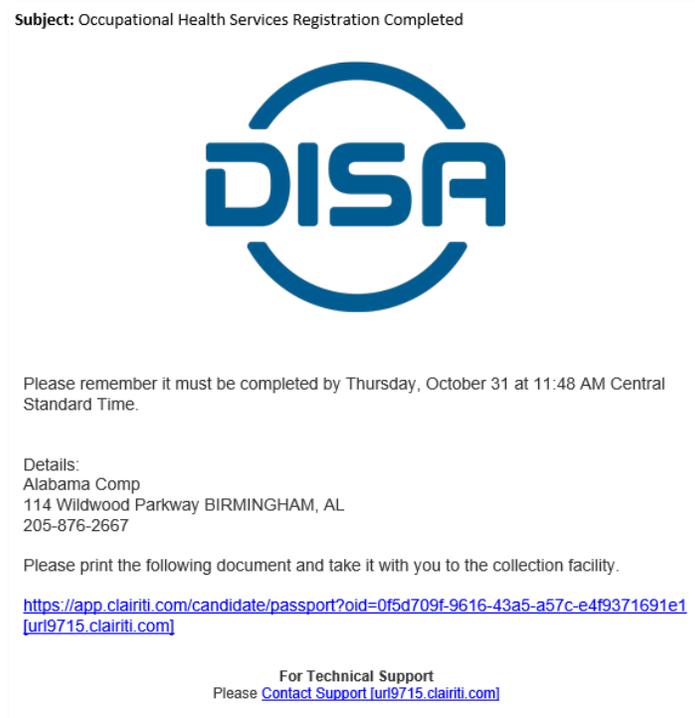
08081	<input type="button" value="Go"/>
AFC UC - Clementon 2001 College Drive Clementon, NJ 856-566-3333 Please call for hours	2 miles <input type="button" value="Select"/>
Inspira UC - Williamstown 364 Berlin Cross Keys Rd Williamstown, NJ 856-885-2600 Please call for hours	3 miles <input type="button" value="Select"/>
Labs Made Easy 2030 N Black Horse Pike Williamstown, NJ 866-582-7774 Please call for hours	4 miles <input type="button" value="Select"/>
Virtua Occ Health - Sewell 239 Hurffville Crosskeys Rd Sewell, NJ 856-341-8200 Please call for hours	4 miles <input type="button" value="Select"/>
Inspira UC - Washington Twp 372 Egg Harbor Road Sewell, NJ 856-218-5900 Please call for hours	4 miles <input type="button" value="Select"/>
Laurel Springs Urgent Care 1238 Chews Landing Rd Laurel Springs, NJ 856-545-9500 Please call for hours	4 miles <input type="button" value="Select"/>

Confirmation: Donor will receive confirmation email once location is selected.

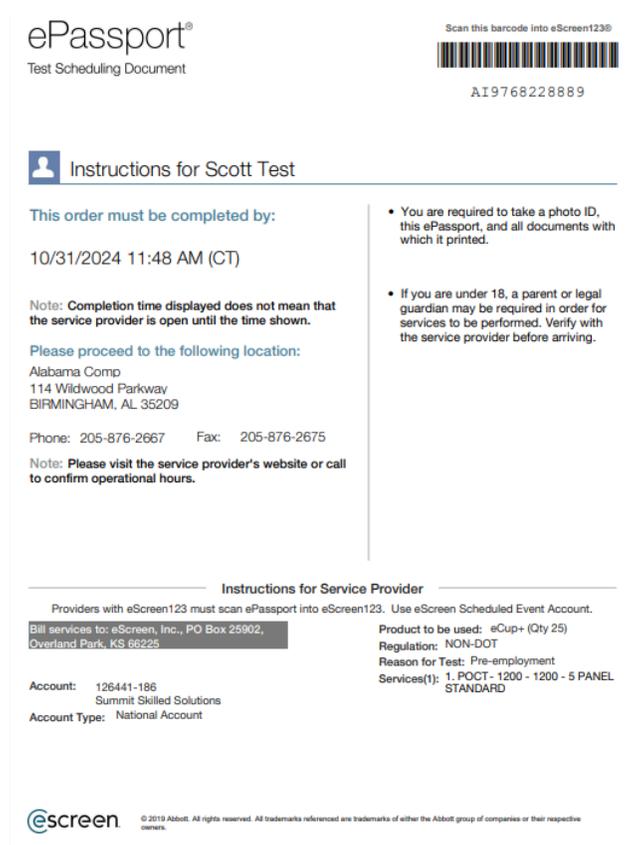
You're registered!

We have sent you details for your registration. Please remember it must be completed by Monday, May 31 at 1:42 PM Eastern Standard Time.

Email with Passport: Candidate will receive a second email containing a link to the e-Passport (candidate registration)



Passport: Once the candidate clicks the link, their passport will populate for the candidate to take to the collection site.



Client Registration – Cause / Reasonable Suspicion

When a user needs to send a donor for a drug screen immediately, follow the steps below:

Select Standard Order or Mini Order from your dashboard:



Select a branch, select 'No Package' from the package list, and then use 'Additional Products' to select which test to order.

Branch* <input type="text" value="Industrial"/>	Package* <input type="text" value="No Package"/>	Additional Products	SHOPPING CART												
Candidate First Name* <input type="text" value="John"/>	Candidate Middle Name <input type="text" value="Legal middle name"/>	Candidate Last Name* <input type="text" value="Doe"/>	<table><thead><tr><th>Item</th><th>Quantity</th><th>Total</th></tr></thead><tbody><tr><td colspan="3">Additional Products</td></tr><tr><td>5 Panel (Urine) - Alere Client</td><td>1</td><td>\$36.23</td></tr><tr><td>Current Price*</td><td></td><td>\$36.23</td></tr></tbody></table>	Item	Quantity	Total	Additional Products			5 Panel (Urine) - Alere Client	1	\$36.23	Current Price*		\$36.23
Item	Quantity	Total													
Additional Products															
5 Panel (Urine) - Alere Client	1	\$36.23													
Current Price*		\$36.23													
Candidate Email Address <input type="text" value="john.doe@email.com"/>	Date of Birth <input type="text" value="01/01/1980"/>														

Finding a location: Once the products are selected, the user will need to select the reason for the test and enter the zip code where the collection should take place. Click 'select' next to the desired location and complete the order.

Reason for Drug Test* <input type="text" value="Reasonable Suspicion/Cause"/>						
<input type="text" value="35242"/> <input type="button" value="Go"/>						
<table><tr><td>Alabama Comp 114 Wildwood Parkway BIRMINGHAM, AL 205-876-2667 Please call for hours</td><td>7 miles <input type="button" value="Select"/></td></tr><tr><td>Fast Pace - Chelsea AL 361 Chelsea Crossroads Chelsea, AL 205-386-2057 Please call for hours</td><td>7 miles <input type="button" value="Select"/></td></tr><tr><td>Neuens Diagnostics Inc 2683 Pelham Pkwy Pelham, AL 205-358-8851 Please call for hours</td><td>8 miles <input type="button" value="Select"/></td></tr></table>	Alabama Comp 114 Wildwood Parkway BIRMINGHAM, AL 205-876-2667 Please call for hours	7 miles <input type="button" value="Select"/>	Fast Pace - Chelsea AL 361 Chelsea Crossroads Chelsea, AL 205-386-2057 Please call for hours	7 miles <input type="button" value="Select"/>	Neuens Diagnostics Inc 2683 Pelham Pkwy Pelham, AL 205-358-8851 Please call for hours	8 miles <input type="button" value="Select"/>
Alabama Comp 114 Wildwood Parkway BIRMINGHAM, AL 205-876-2667 Please call for hours	7 miles <input type="button" value="Select"/>					
Fast Pace - Chelsea AL 361 Chelsea Crossroads Chelsea, AL 205-386-2057 Please call for hours	7 miles <input type="button" value="Select"/>					
Neuens Diagnostics Inc 2683 Pelham Pkwy Pelham, AL 205-358-8851 Please call for hours	8 miles <input type="button" value="Select"/>					

Email with Passport: Once the order is submitted, the **user** will receive an email with the registration passport link contained in the body of the email.

Donor Passport: Once the link is clicked, the donor's passport will appear for the user to print and send the donor with.

Occ Health FAQ

What happens when an Occ Health registration expires?

When a registration/collection timeframe expires, the requesting user will receive an email notification. Clicking the link in the email will re-order the drug screen and kick off a new email to the candidate giving them a fresh expiration time frame to register and go to the lab.

What to do

- If a user wishes to allow candidate more time to complete their occupational health requirements:
 - Click link in Expiration email
 - This will bring you to the Add Search onto the candidate order
 - Select Products – Click the OccHealth product(s) needed
 - Add Searches – the candidate will get a new Donor Registration email

Sample Expiration email:



What if there are no electronic locations?

If there are no electronic registration locations near your donor, the system will automatically locate an out-of-network location to send the donor to. However, if you are sending a donor to an out-of-network location you will need to provide the donor with a paper chain of custody form to the collection site.

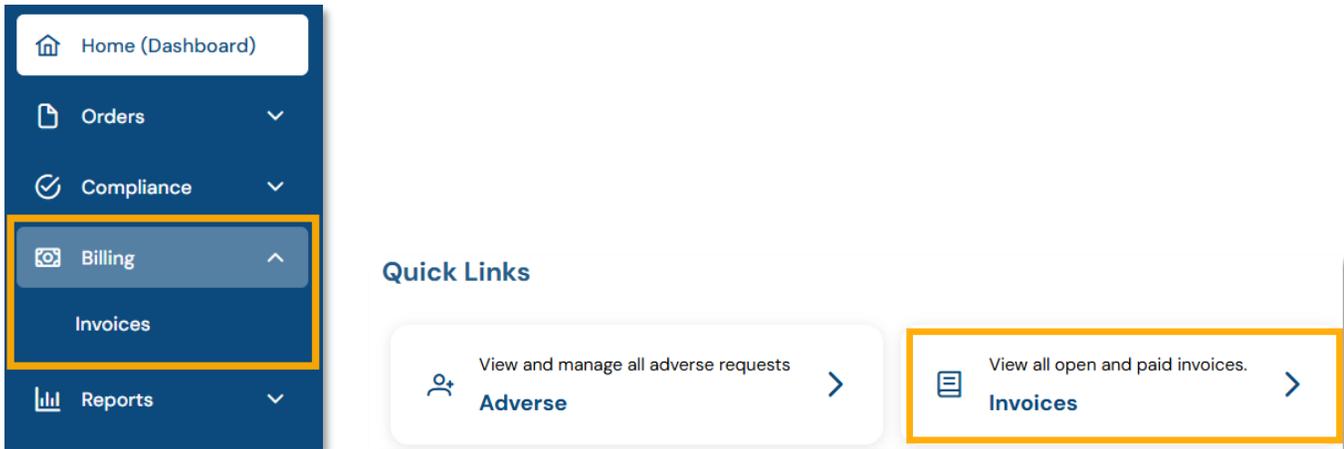
What to do

- Place the order as directed above (use the method appropriate to the situation)
 - **Remember:**
 - If you select 'donor registration' → your donor will receive the email to register for the services
 - If you select 'client registration' → you will receive the passport once the donor is registered for their services
 - Provide the donor with a paper COC form, passport and send them for their collection
 - If you placed a 'donor registration' order, then you will need to direct the donor to their email to obtain the passport
 - Donor will need to take the paper COC and Passport to the out-of-network site
 - If you placed a 'client registration' order you will need to click on the link in the registration email to obtain the passport

Invoicing & Finance

Invoices are emailed to your account's billing contact on the 1st of each month. Payment instructions and options are included in the email.

Billing information is available online based on user permissions. Users with these permissions can access the Finance dashboard, which can be found in these two places on the home dashboard:



Finance Dashboard

The Finance dashboard shows unpaid invoices at the top and previously paid invoices below

Finance Dashboard				
Invoices Awaiting Payment				
Invoice Number	Invoice Type	Created Date	Due Date Date	Invoice Amount
Clairiti-2021-MedCenter	Ad-Hoc	01/29/2021	02/28/2021	\$272.42
GHRR-TMPMC_2105	Monthly	05/31/2021	05/31/2021	\$32,543.36
Clairiti-20219-5278	Monthly	09/30/2021	10/30/2021	\$6,557.37
FormatTesting3	Ad-Hoc	11/29/2023	11/29/2023	\$19.50
Invoices Previous and Paid				
Invoice Number	Invoice Type	Created Date	Due Date Date	Invoice Amount
Clairiti-20194-114	Monthly	03/31/2019	04/30/2019	\$0.00
GHRR-TMPMC_2105	Monthly	05/31/2021	05/31/2021	\$32,643.36

Invoice Details

Click the invoice number to open the summary details.

Invoice - 20219-5278

View PDF Print Invoice Download Excel

Candidate Summary View Details

Invoice Number: 20219-5278	Invoice Amount: 6557.37	Invoice Type: Monthly
Invoice Due Date: 10/30/2021	Invoice Date: 09/30/2021	Invoice Status: Submitted
Client: Medical Center	Last Updated: 9/30/2021 6:51 PM	

- View PDF: generates a PDF copy of the invoice
- Print Invoice: prints a copy of the invoice
- Download Excel: generates an excel sheet of the invoice
 - This is the most detailed version and allows the ability to sort your candidates/locations
- Candidate Summary: opens a table of cost per candidate
- View Details: opens the full invoice details online

If your account utilizes locations for billing purposes (“organizations”), the number of candidates and cost allocated to each location will be shown on the Finance dashboard as well as the PDF/Excel versions of the invoice.

Organization Summary

Organization	Qty of Candidates	Fees	Price	Total
Medical Center	14	\$170.32	\$972.33	\$1,142.65
CA - Central Valley	52	\$731.04	\$2,547.95	\$3,278.99
FL - Jacksonville	13	\$180.01	\$527.94	\$707.95
FL - Tampa	6	\$54.81	\$270.25	\$325.06
FL - Miami	3	\$142.15	\$207.09	\$349.24
TX - Dallas	8	\$251.08	\$282.45	\$533.53
CA - Palm Springs	2	\$26.25	\$191.70	\$217.95
				\$6,555.37