



Step 1: Log into system

Logging In to the System:

Go to www.quicksius.com

Hit client login (bookmark this page for future access)
(Contact Customer Service or Sales to set up)

After Logging in, you should see the screen below with your name and company logo:

The screenshot shows the Quick Search client dashboard. At the top left is the Quick Search logo with the tagline 'COMPLETE SOLUTIONS FOR BACKGROUND SEARCHES'. To the right is a 'Logout' link. Below the logo is a navigation bar with tabs for 'Home', 'Order Reports', 'Report Management', and 'My Account'. A search bar labeled 'Quick Find' contains the text 'Who are you looking for?' and a search icon, with a link to 'Advanced Search'. The main content area is titled 'J Page Home Page' and features a section 'Access Your Reports' with six icons: 'In Progress (0)', 'Completed (26)', 'SwiftHire (0 / 0)', 'Archived (0)', 'Needs Attn (0)', and 'Discrepancy (13)'. On the right side, there are two yellow boxes for 'My Notes (0) Add note' and 'Company Notes (0) Add note', both showing 'No Notes'.

Step 2: Print out authorization / release forms

Click the My Account tab, then My Documents

The screenshot shows the 'My Documents' page in the Quick Search client dashboard. The navigation bar at the top has the 'My Account' tab selected. The search bar contains 'Who are you looking for?'. The main content area is titled 'Profile: My Documents' and contains a table with the following data:

Title	Doc Type	Description	Date
VA Statewide Release Form	Standard		10/12/2011
NH Statewide Record Release Form	Standard		10/12/2011
NV Statewide Release Form	Standard		11/02/2011
Quick Search Authorization Form	Standard		11/26/2012

On the right side, there is a 'Profile' dropdown menu with the following options: 'My Account Info', 'My Results Delivery', 'My Password', 'Company Info', 'Reference Options', 'Rejection Options', and 'My Documents' (which is underlined).

Select your company's branded authorization form from the list and give to the subject to fill out. He/She is to keep the Summary of Rights and return the first page to you. You will need to scan this form into a PDF or JPEG onto your computer. *Keep the original for your files.*



Step 3: Order background screening report in system

Click the Order Reports tab.

The screenshot shows the 'Applicant: Create Profile' section with the following fields and options:

- 1** Name: Smith, John, Middle
- Address: 101 Main St
- City: Anywhere, State: TX, Zip: 75214
- Social Security Number: [Redacted]
- Additional Names to Search: [Dropdown]
- Additional Addresses to Search: [Dropdown]
- 2** Upload Document(s) for this Applicant: [Button]
- 3** Send Report to Applicant: by email
- Yes, allow us to contact applicant at Phone: [Field]
- *** In compliance with FCRA, I certify that I have on file the applicant's written and/or electronic consent and authorization to conduct a background check. [Text area]
- Reference Code: [Field] Email: [Field]

The 'Criteria: Select Searches' section shows:

- 4** Select Package: City of Dallas Chapter 47A Ordinance Driver Backg [Dropdown] [Select]

On the right side, there is a 'Current Order' summary showing a Total Price of \$0.00 and an 'Order' button. Below that are 'Save as Draft' and 'View Drafts' buttons.

- 1) Enter subject information as shown on release form.
- 2) Upload the PDF or JPEG of the release form.
- 3) (Optional Features) For subjects who requested they receive a copy of the completed report, please enter their email address. If you would like to enable us to contact the subject should the need arise, please enter a phone number. If you have set up reference codes for billing, please enter the code.
*** (Required) You MUST affirm the statement saying that you written permission from the subject.**
- 4) Select the package you would like to order in the drop-down then press SELECT. Wait a few seconds and you should see a screen similar to the one on the next page.

The screenshot shows the 'Applicant: Create Profile' section with the following fields and options:

- Name: Smith, John, Middle
- Address: 101 Main St
- City: Dallas, State: TX, Zip: 70521
- Social Security Number: 01/23/1946
- Additional Names to Search: [Dropdown]
- Additional Addresses to Search: [Dropdown]
- Upload Document(s) for this Applicant: [Button]
- Send Report to Applicant: by email
- Yes, allow us to contact applicant at Phone: [Field]
- Reference Code: [Field] Applicant email: [Field]

The 'Criteria: Select Searches' section shows:

- Select Package: 7-year Complete Criminal History - \$38.00 [Dropdown] [Select]
- View Address History [Link]
- Save order configuration for use in future orders
- need help finding a location? [Link]
- County Criminal Record Search Fel and Misd 4 Selected info Package X
- National Criminal / Sex and Violent Offender Search 1 Selected info Package X
- SSN Address Trace 1 Selected info Package
- Show More Searches [Link]

At the bottom, there is a legend: Not in order (grey), Needs work (yellow), Complete (green).

The parts of the package will auto-populate according to client settings and an address history based on the Social Security Number Trace.

Please eliminate any aliases or name misspellings not on the release by clicking the red X next to the name.

In some cases a search will be yellow and needs additional information. Click on the yellow bar, fill in any requested information, and press save. The bar will turn green and is now ready to be ordered. When all search types have a green bar, press the green order button at the upper right side of the page. After a few moments, an order confirmation will appear on the screen.



Step 4: Check Status of report/search

Click the “In Progress” icon on the home screen or the “Report Management” tab to see a list of pending reports.

Click on the subject’s name to see the Detailed Applicant View

Applicant: Detailed View Back to List

Smith, John

SSN: 456-47-**** Ordered: 11-21-2012
DOB: 08/30/**** In Progress

View Report Options 8 of 9 Completed

Search Types	Done
County Criminal Record Search Fel & Misd - Hillsborough, New	<input type="checkbox"/>
County Criminal Record Search Fel & Misd - Wichita, Texas	<input checked="" type="checkbox"/>
County Criminal Record Search Fel & Misd - Dallas, Texas	<input checked="" type="checkbox"/>
National Criminal / Sex & Violent Offender Search - National	<input checked="" type="checkbox"/>
SSN Address Trace	<input checked="" type="checkbox"/>
County Criminal Record Search Fel & Misd - Tarrant, Texas	<input checked="" type="checkbox"/>
County Criminal Record Search Fel & Misd - Wichita, Texas	<input checked="" type="checkbox"/>
County Criminal Record Search Fel & Misd - Dallas, Texas	<input checked="" type="checkbox"/>
National Criminal / Sex & Violent Offender Search - National	<input checked="" type="checkbox"/>

County Criminal Record Search Fel & Misd - Hillsborough, New Hampshire
Details: Hillsborough, New Hampshire
In Progress
Status request 2

County Criminal Record Search Fel & Misd - Add doc Documents
No Documents

County Criminal Record Search Fel & Misd - Add note Notes
Approved By Quality Assurance Department - 01/13/2012
Sent to Quality Assurance Department - 01/12/2012

On this screen you can:

1) See the status of each part of the report: **Completed** searches are marked with a check mark. Searches with **Records or Possible Records** are marked with a flag. If any notes from the researcher, including ETA's, have been entered, they will be marked with the blue bubble and appear on the notepad at the bottom of the screen.

2) If there is no ETA listed, you can request an update by clicking the “Status Request”. This will send an email to our researcher asking them to complete the search or provide an ETA.

Step 5: View, Print, Archive, Email Reports

Enter first or last name in Quick Find feature at top of screen and name will come up in report management window. Click on name and then click on view report options under DOB. Then click on option that you require. To copy a report to another system, use PRIMO PDF or similar PDF converter to create PDF of report.

Step 6: Generate Pre-Adverse or Adverse Action Letter

Enter name in Quick Find feature and bring up name in report mgt. tab, click on name, click on view report options. Hit order more, go down to order individual searches under your package and hit submit, then choose pre-adverse or adverse action



letter. Letter will be emailed to you or can be pulled up in the system. Copy letter and put on your companies letterhead.

Key Quick Search contacts:

Report Review Consultant

Greg Hodgens at 1-214-358-2880 ext. 127 or
ghodgens@quicksius.com

Customer Service Hotline/Operations Manager

Dale Wolter at 1-214-358-2880 ext. 114 or
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