

TEAM SIDELINE USER GUIDE



JDP

RISK MITIGATION SPECIALISTS

Accuracy. Speed. Client-Focused.

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INTRODUCTION

Overview

The JDP Platform is a web-based pre-employment screening utility, offering fast, background information to meet your needs. The JDP Platform offers an automated and interactive ordering system, customized screening packages based on position, custom adjudication criteria, flexible reporting options, tiered background screening, timely results, online billing, and accommodating administration functions making The JDP Platform a comprehensive solution for any employer's hiring program.

For additional information regarding other services, such as batch ordering and Volunteer Eligibility Verification (VEV) service please refer to Inside The JDP Platform.

The JDP Platform provides maximum accessibility regardless of what type of computer system and/or browser you use.

In order to get the most visually pleasing experience, use a monitor resolution of 1024 x 768 or greater and the latest version of the following Java-enabled browsers:

- Microsoft® Internet Explorer® version 11 or higher
- Apple® Safari™ version 1.2 or higher
- Mozilla® Firefox® version 2.0 or higher

In this Guide

This guide is designed for you to use as a reference tool for The JDP Platform. It describes the process of ordering background checks, viewing results and administrative functions. At the end of this guide are frequently asked questions.

USING THE JDP PLATFORM

Logging into The JDP Platform

Your JDP Platform account is customized to. Certain setup options and available products will vary depending on your account. If you have questions about your account, contact your system administrator or call JD Palatine Technical Support for assistance.

The Internet address for The JDP Platform is <https://www.jdpalatine.net>. Typing this address into your web browser will bring you to the **The JDP Platform Login screen**.

Logging In

Follow the steps below to log into The JDP Platform.

STEP	ACTION
1	In the Username field, enter the Username given to you by The JDP Platform administrator.
2	In the Password field, type your password.
3	Click ' Login ' and The JDP Platform main screen appears.

Note: You must obtain your initial password from The JDP Platform administrator or from JDP. If this is your first time logging in or your password has expired, the Change Password screen will appear.

USING THE JDP PLATFORM

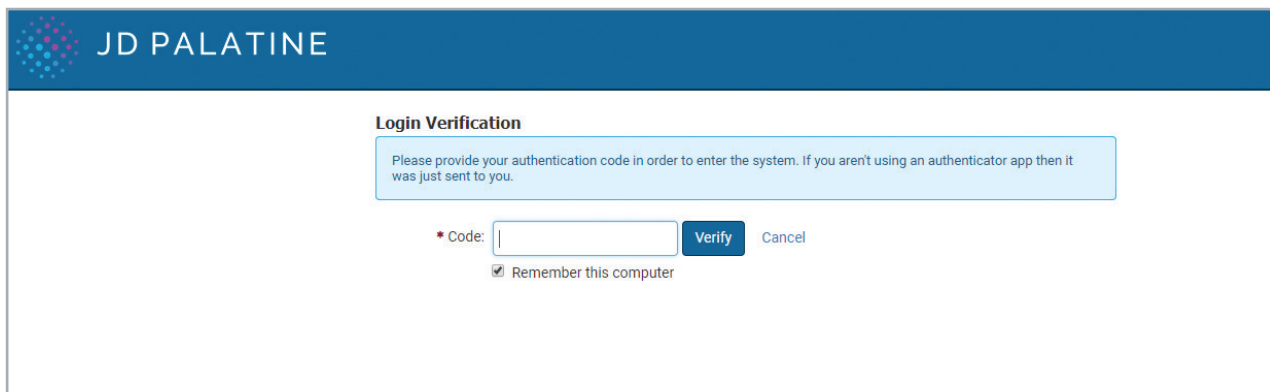
Forgot Password

Your initial password is given to you by your JDP Platform administrator. If this is your first time logging in or your password has expired, you will need to change your password. You can also change your password whenever you wish via the My Profile / Security section within your account dashboard. You may also contact your JDP Platform system administrator or call JDP Technical Support for password assistance.

If you have forgotten your password, you can reset it by clicking on the Forgot Password link. You will need to provide your Username and provide the answer to your secret question.

Login Verification

On the initial login, you will be required to enter in an authentication code in order to enter the system.



JD PALATINE

Login Verification

Please provide your authentication code in order to enter the system. If you aren't using an authenticator app then it was just sent to you.

* Code:

Remember this computer

Changing Initial or Expired Passwords

Change Password

Use the following steps to change an initial or expired password.

Note: You must first login to The JDP Platform

STEP	ACTION
1	When the Change Password screen appears, enter your current password in the Old Password field.
2	Enter the new password in the new password field. See the Password Guidelines below.
3	Retype your new password to confirm it.
4	Click the 'Save' button to save your changes.

USING THE JDP PLATFORM

Password Guidelines

Use the following guidelines when creating a new password:

- Password must be at least eight characters in length
- Password must contain at least one non-alphabetic symbol
- Password must contain at least one letter
- Password must contain at least one digit

Password must not contain:

- Account Number or User ID
- Three of the same characters in succession. (Ex: aaa, bbb, ccc)
- New password cannot be a previously used password

Site Navigation

Navigation Toolbar

Home, Order, Workspace, Admin, Utilities, My Profile, Help and the Log Out links will be universally available from the Navigation menu in all sections of The JDP Platform. The navigation menu on the top of the screen allows you to navigate through the The JDP Platform website. The descriptions of the toolbar options are explained below.

Note: The navigation menu options may vary depending on the account and user privileges.

Time Out Notification

For security purposes, The JDP Platform uses an inactivity timeout feature. Two minutes prior to the session time out a message will display requiring the user to click "Renew" to continue. If no input is received from the user before the timer expires, the user session will end.

DASHBOARD FEATURES

Basic Features

Available from the homepage, the Dashboard provides you with quick and easy access to the system functions. The below tabs are available:

- **Home:** This is where legislative and alerts are as well as contact information for Customer Service.
- **Order:** This is to place a new order.
- **Reports:** This is to view reports that have been ordered.
- **Admin:** This is to add new users or edit current user permissions.
- **Utilities:** This is to run reports such as turnaround time.

The screenshot shows the JD Palatine dashboard interface. At the top, there is a dark blue header with the JD Palatine logo on the left, a search bar with a dropdown menu labeled 'Last Name', a search input field, and a 'Go' button. On the right side of the header, the user's name 'Heidi' is displayed with a dropdown arrow. Below the header is a navigation bar with five tabs: 'HOME', 'ORDER', 'REPORTS', 'ADMIN', and 'UTILITIES'. The main content area starts with a 'Welcome Heidi' message, followed by a note: 'Your last login was on Sep 14, 2017 at 7:27 AM MDT'. There are two main content blocks: 'News & Announcements' and 'Contact Us'. The 'News & Announcements' block includes a heading 'Welcome to JD Palatine, your Risk Mitigation Specialists!' and a link to the 'JDP Help Desk'. It lists four bullet points: 'Federal and State Specific Laws', 'FCRA and other Consumer Report Resources', 'FCRA and State Specific Forms', and 'Legislative Alerts'. The 'Contact Us' block provides contact information: Phone: 855-940-3232, Fax: 724-799-8460, Email: customerservice@jdp.com, and the company address: JD Palatine, Oxford One Centre 301 Grant Street, Suite 4300, Pittsburgh, PA 15219.

ORDER TAB

Overview

The JDP Platform Order Entry process follows a step-by-step sequence and will vary depending on the component(s) or package that you are ordering. For example, if your package does not include an employment verification report, you will not be required to enter the subject's present and past employment information during the Order Entry process.

Packages

Package Details

Packages in The JDP Platform provide you with a convenient selection of multiple component combinations. The JDP Platform package details can be viewed by selecting the package from the product/package from the "Order" tab.

Creating Your Order

Getting Started

To begin the Order Entry process, click on the Order tab and select the appropriate package for the candidate. After selecting appropriate package there are 2 options at the bottom:

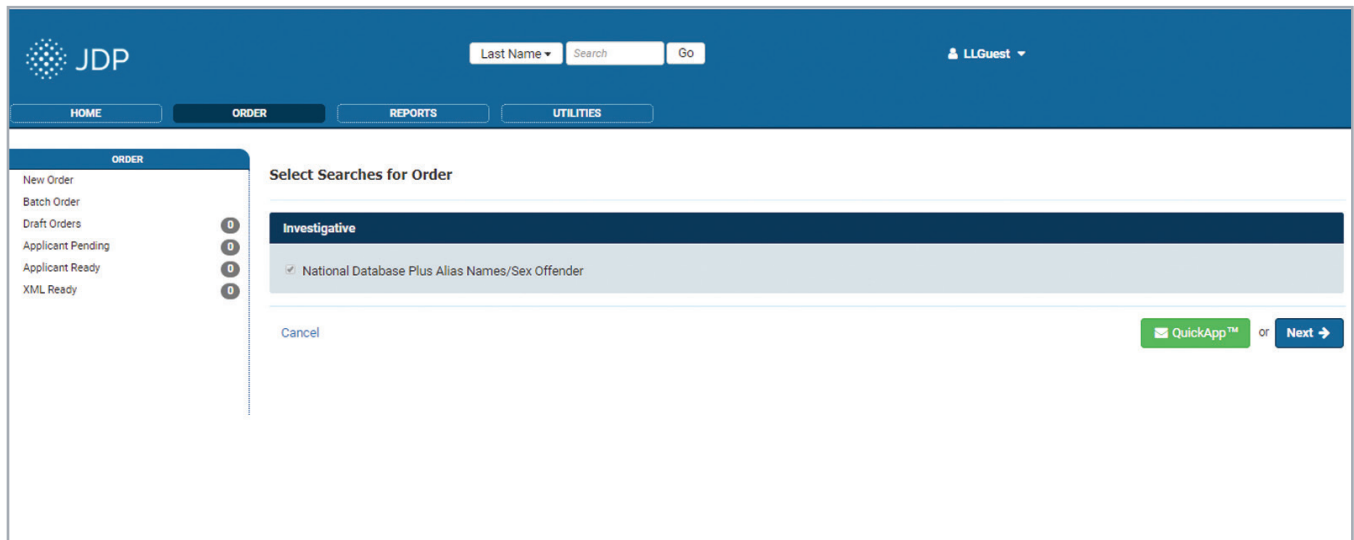
- **Quick App:** this process would require you to enter in the candidate's name and email address, then an email would be sent to the candidate to complete the background questionnaire

ORDER TAB

Selecting Your Order Preference

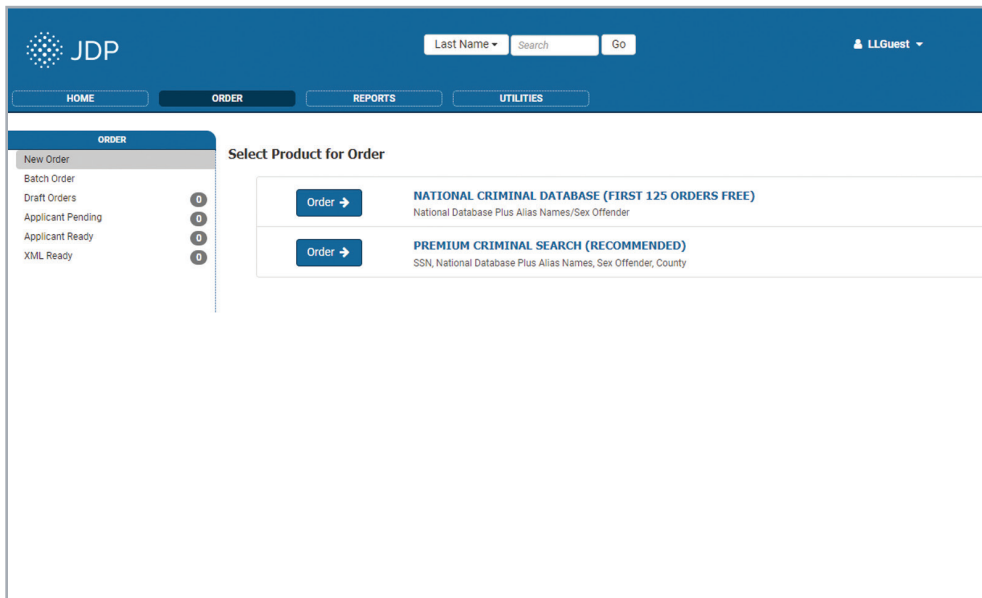
There are a variety of order options to choose from in Employment Screening, allowing you to order both individual components and defined packages.

- An individual component is a single search component .
- A defined package is one that is developed specifically. Follow the steps below to start your order.

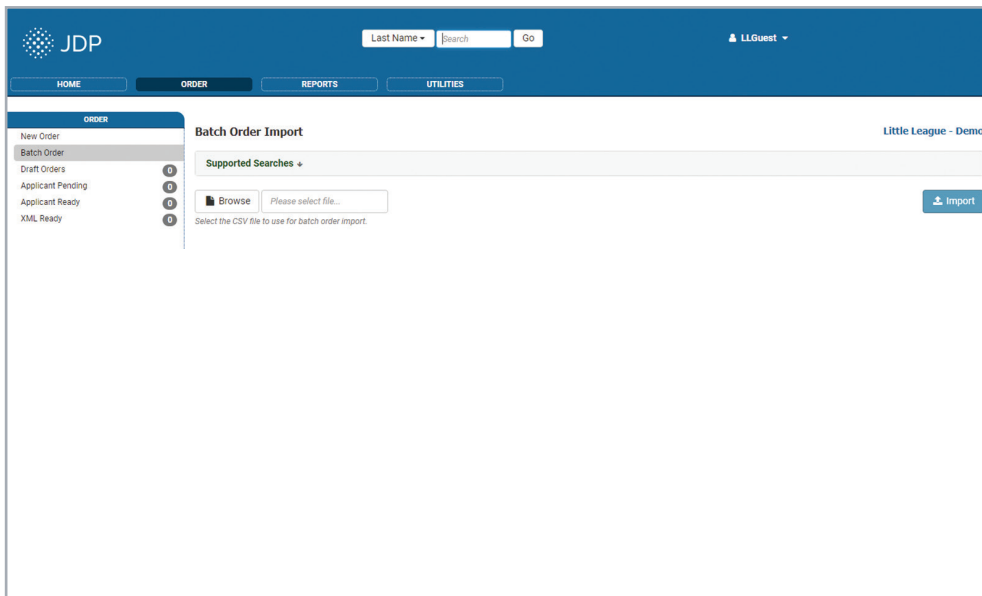


BATCH PROCESSING

If you need to order a batch of volunteers, contact JDP to receive the specific layout of the document. Then click on the "Order" tab and click "Batch Order".



Click on "Browse" and select the appropriate file and click "Upload".



REPORTS TAB

Overview

The JDP Platform Reports tab allows you to view pending and completed reports as well as view detailed information on what was returned for each of the searches. Within the report, you are also able to add searches to the order.

Reports

- Pending Reports: These are reports that are still pending to be completed
- Completed Reports: These are reports that are completed fully
- Disclosure Reports: These are ones that are awaiting a disclosure prior to moving forward.
- Find: Are able to pull up the last 10, 25, 50 or 200 reports that have been processed.

The screenshot displays the JDP Platform Reports tab interface. At the top, the header includes the JD PALATINE logo, a search bar with 'Last Name' and 'Go' buttons, and a user profile 'Heidi'. Below the header is a navigation menu with 'HOME', 'ORDER', 'REPORTS' (highlighted), 'ADMIN', and 'UTILITIES'. The main content area is titled 'Pending Reports' and features a table with columns: Name, SSN, File, Report To, Ordered By, Status, Ordered, Type, and Flag. The table currently shows 'No reports to display.' Below the table are navigation controls (back, forward, refresh) and a 'Refresh' button. The footer of the interface shows 'Items per page: 15' and 'Showing 0 to 0 of 0 entries'. On the left side, there is a sidebar with 'REPORTS' and 'FIND' sections. The 'REPORTS' section includes 'Pending Reports' (0), 'Completed Reports', 'Disclosures Queue' (0), and 'Monitoring Queue' (0). The 'FIND' section includes 'Last 10 Reports', 'Last 25 Reports', 'Last 50 Reports', 'Last 200 Reports', and 'Advanced Search'.

REPORTS TAB

Report Results

- Order Detail: this will provide information on the status of the report, when the report was ordered/ completed, who ordered the report, which package was ordered and the charges for the order.
- Applicant information: this will provide all applicant information.
- Search Results: this will provide information returned from the searches along with status information on each search
- Attachments: this is where all disclosures and acknowledgments are kept
- Disclosures and Forms: this is where consumer copy and adverse action letters can be emailed to the candidate

The screenshot displays the JD PALATINE web application interface. At the top, there is a navigation bar with tabs for HOME, ORDER, REPORTS (selected), ADMIN, and UTILITIES. A search bar with 'Last Name' and 'Go' buttons is present, along with a user profile for Heidi. The main content area is titled 'Report Results - #1865365 - TEST, JDP' and includes a 'Sales Demo' section for Heidi Clemens. The interface is divided into several sections: 'Order Details' showing a 'Complete' status, 'Applicant Information' with fields for Name, Email, Address, SSN/DOB, and Phone, 'Search Results' with a table of search types and statuses, 'Attachments' (currently empty), and 'Disclosures and Forms' with a dropdown menu and 'View'/'Email' buttons.

Search	Status
County Criminal Records Search	+
PA-ALLEGHENY (TEST, JDP)	Complete
State Criminal Court Search	+
PENNSYLVANIA (TEST, JDP)	Complete
Federal Criminal Records Search	+
PENNSYLVANIA WESTERN (TEST, JDP)	Complete
National Criminal Database Alias Search	
NATIONWIDE (TEST, JDP)	Complete

ADMIN TAB

Overview

The JDP Platform Admin tab is where you can add new users and edit current user permissions. This will provide you the option to add/edit users or you can call Customer Services and we can make the changes for you.

Add User

- Click the "+User" in the right corner
- Input First Name, User Name, New Password (Defaults to Change Password on First Login) All fields with an asterisk is required.
- Under the remaining tabs: Permissions, View Reports and Mgmt Reports, select the appropriate permissions for the user.

The screenshot shows the 'Add User' form in the JDP Platform Admin interface. The form is organized into three main sections: Personal Information, Account Information, and Multi-Factor Authentication (MFA) Information. The 'User' tab is selected at the top. The 'Personal Information' section includes fields for First Name, Last Name, Job Title, Phone Number, Alt. Phone, Fax, Fax Instructions, Email, and Notes on User. The 'Account Information' section includes Login Type (Standard, Link Only, XML Only, No Access), Username, New Password, Retype Password, Force Password Change checkbox, Status (Active, Disabled), Disabled User Message, and Reason User Was Disabled. The 'Multi-Factor Authentication (MFA) Information' section includes a Method dropdown menu set to 'User Setup Required'. At the bottom right, there are 'Cancel' and 'Save' buttons.

UTILITIES TAB

Overview

The JDP Platform Utilities tab is where you can process production reports that are real time.

Production Reports

- **Hit Ratio:** template provides a list of searches completed within a selected date range that can be grouped and subtotaled by client, vendor or processor. The report indicates the existence of a hit and the number of hits on a report.
- **Production Utilization:** template provides a quantity of each type of search ordered client by client within a selected date range.
- **Status Reporting:** template provides limited details on outstanding incomplete reports within a selected date range. The report can be grouped and sub-totaled by client or processor (for one or all processors) and filtered by number days outstanding.
- **Time Service Report:** template provides granular time service for managing the perspectives of all the players for completing reports in the background screening process within a selected date range .

The screenshot shows the JD PALATINE web application interface. At the top, there is a navigation bar with the JD PALATINE logo, a search bar with a dropdown for 'Last Name', a 'Search' input field, and a 'Go' button. The user's name 'Heidi' is displayed in the top right corner. Below the navigation bar, there are five menu items: HOME, ORDER, REPORTS, ADMIN, and UTILITIES (which is highlighted). The main content area is titled 'Utilities - Jurisdiction Lookup' and contains the following text: 'From here you can lookup jurisdictions by launching the Jurisdiction Lookup Tool below.' Below this text, there is a section titled 'Jurisdiction Tool' with a small icon and the instruction: 'Once the tool has been opened, feel free to navigate anywhere within InstaScreen(tm) and the tool will remain open until you close it.' A button labeled 'Jurisdiction Tool' is visible below the instruction. On the left side of the main content area, there is a sidebar menu with the following categories and items: 'UTILITIES' (highlighted), 'TOOLS' (Jurisdiction Lookup, Collection Site Lookup, Move Report, Form I-9 Compliance), 'REPORTS - PRODUCTION' (Hit Ratio, Product Utilization, Status Reporting, Time Service Report), and 'REPORTS - SPECIALTY' (Charges Report).