

USER GUIDE

V1.21.19



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 business 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 Employee Eligibility Verification (EEV) 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

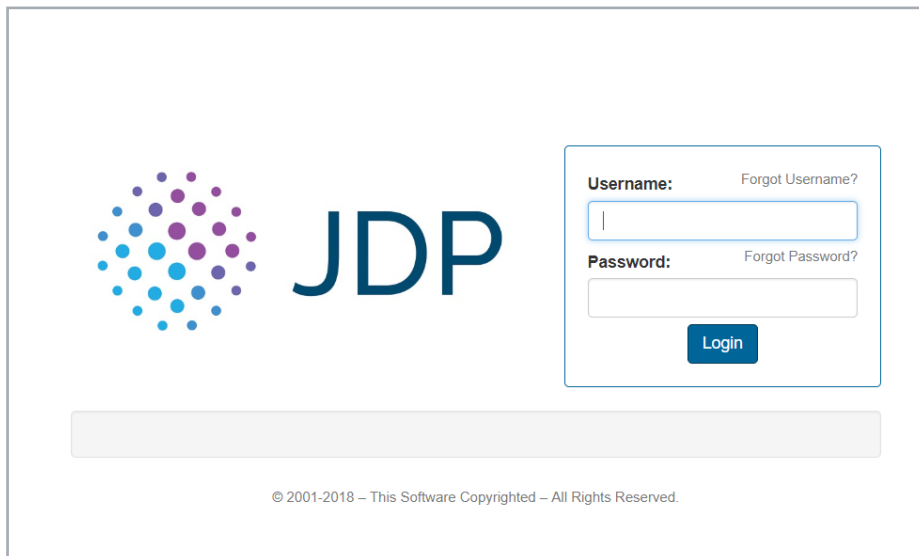
This guide is designed for you to use as a reference tool for The JDP Platform. It describes the process of ordering background checks, viewing results and administrative functions. At the end of this guide are frequently asked questions.

USING THE JDP PLATFORM

Logging into The JDP Platform

Your JDP Platform account is customized to your company's specifications. 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 displays the JDP dashboard interface. At the top, there is a dark blue navigation bar with the JDP logo on the left and several menu items: 'Order 180', 'Reports', 'Admin', and 'Utilities'. On the right side of the navigation bar, there is a search box containing 'Last Name' and a circular 'HC' icon. Below the navigation bar, the main content area is white. It starts with a welcome message: 'Welcome back, Heidi.' followed by a timestamp: 'Your last login was on Nov 29th at 12:49 pm'. The dashboard is divided into two main columns. The left column has a blue header 'News & Announcements' and contains two sections: 'Welcome to JDP, your Risk Mitigation Specialists!' with links to 'JDP Help Desk' and 'JDP Customer Support Center', and a list of resources including 'Federal and State Specific Laws', 'FCRA and other Consumer Report Resources', 'FCRA and State Specific Forms', and 'Legislative Alerts'. The right column has a blue header 'JDP' and contains contact information: 'Phone: 855-940-3232', 'Fax: 724-799-8460', 'Email: customerservice@jdp.com', and 'Address: 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
- **Next:** this process would require you to enter the information needed to complete the background questionnaire.

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 for your company. Follow the steps below to start your order.

ORDER TAB

Order **180** ▾ Reports ▾ Admin ▾ Utilities ▾ HC

Select Searches for Order Sales Demo

Investigative

- County Criminal Records Search
- State Criminal Court Search
- Federal Criminal Records Search
- National Criminal Database Alias Search

Verification

- Employment Verification

Credentials

- Education Verification

Substance Abuse Screening

Substance Abuse Detection

- 10 Panel Non-DOT Lab Based Urine (I3)
- JD Palatine, LLC NDOT lab-based drug tests (eScreen)

* Requestor (Sales Demo)

ORDER TAB

Order Entry

Education Verification Sales Demo - Level 1 Demo Package
Order Entry *step 5 of 8*

| | | | |
|---|------------------------|---|------------------------|
| * Name of Institution <input type="text"/> | | Name Used While Attending <input type="text"/> | |
| Registrar Phone ##### | Registrar Fax ##### | * Start Date MM/YYYY | * End Date MM/YYYY |
| Registrar's Email <input type="text"/> | | * Degree Claimed <input type="text"/> | Degree Date MM/YYYY |
| * Institution's Address STREET ADDRESS <input type="text"/> | | Major <input type="text"/> | |
| ZIP CODE | * CITY | Honors <input type="text"/> | |
| Additional Information <input type="text"/> | | | |
| <input type="button" value="+ Another Institution"/> | | | |
| <input type="button" value="Save Draft"/> <input type="button" value="Cancel"/> | | <input type="button" value="Next →"/> | |

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Options Fields

These fields can be option or required, it can include drop down boxes specifically for your company.

- Reference
- Position/Title
- Proposed Salary

Required Fields for Quick App:

- Last Name
- First Name
- Email Address

Required Fields for HR Entry (Next Option):

- Last Name
- First Name
- Middle Name
- SSN
- Confirm SSN
- DOB

ENTERING EDUCATION INFORMATION

General Concepts

Note: The Education screen is conditional and will only appear if you are ordering an Education Background Report.

Use the **Education** screen to enter details about the subject's education experience. Fields indicated with an asterisk are required and must be completed before you can continue with your order.

If you are ordering a package that includes multiple education institutions, you have the opportunity to add additional institutions to the search.

Follow the steps below to complete the **Education Institution** screen .

JD PALATINE Last Name Search Go Heidi

HOME ORDER REPORTS ADMIN UTILITIES

Education Verification Sales Demo - A La Carte
Order Entry step 4 of 5

* Name of Institution
Registrar Phone Registrar Fax
Registrar's Email
* Institution's Address
STREET ADDRESS
ZIP CODE * CITY
Additional Information
+ Another Institution

Name Used While Attending
* Start Date * End Date
* Degree Degree Date GPA
Major
Honors

Save Draft Cancel Next

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ENTERING EMPLOYMENT INFORMATION

General Concepts

Note: The Employment screen is conditional and will only appear if you are ordering a Current or Previous Employment Report.

Use the **Employment** screen to enter details about the subject's present and former employment experience. Fields indicated with asterisk are required and must be completed before you can continue with your order. If you are ordering a package that includes multiple former employment reports, you have the opportunity to add additional employers to the search.

Follow the steps below to complete the **Employment Information** screen.

Employment Verification - Applicant Sales Demo - Level 1 Demo Package
Order Entry step 3 of 8

Currently Employed? Yes No

Current Employer

* May We Contact This Employer? Yes No

* Employer: BLAND & ASSOCIATES Contact Phone: 402-397-8822

Contact Email: Contact Fax:

Employer Address: STREET: 68114 OMAHA NE

* Name While at This Employer: DEMO HEIDI MI

Start Date:

Job Title or Position: TAX CONSULTANT Supervisor: MICHAEL BLAND, SR.

Salary: 75,000 Per: Year Type or Status: Full-time

Reason for Leaving:

+ Add Current Employer
+ Add Previous Employer

Save Draft Cancel **Next** →

REVIEWING YOUR ORDER IN ORDER SUMMARY (HR ENTRY ONLY)

General Concepts

The Review Order screen allows you to review your order information before submitting the order.

Submitting Your Order

Follow the steps below to submit your order for processing.

| STEP | ACTION |
|------|--|
| 1 | Review each section of the Order Summary screen to determine if all the subject is accurate and correct. |
| 2 | Use the Edit buttons to edit any information that is incorrect or to include additional information. |
| 3 | If you are satisfied with your order, click Submit to continue the Checkout screen. |

Canceling Order Requests

If you wish to cancel the order, click "Cancel".

The screenshot displays the JDP Order Summary interface. At the top, there is a navigation bar with the JDP logo, 'Order 180', 'Reports', 'Admin', and 'Utilities' menus, along with a search bar and a user profile icon labeled 'HC'. Below the navigation bar, the applicant information is shown: 'Applicant: HEIDI DEMO (111-22-3333, 01/01/1970)' and 'Current Address: 100 MAIN STREET, PITTSBURGH, PA 15219'. A table titled 'Search Summary for Package 1' lists four search types: County Criminal Records Search, State Criminal Court Search, Federal Criminal Records Search, and National Criminal Database Alias Search, each with a location and associated fees. Below the table, there is a note about additional fees and a summary of estimated costs: Estimated Subtotal: 0.00, Sales Tax: 0.00, and Estimated Total: 0.00. The interface also includes sections for 'Authorization: None Attached' with an 'Upload File' button and a 'Drag File' drop zone, and 'Order Entry Notes' with a text area. At the bottom, there are buttons for 'Save Draft', 'Cancel', 'Complete Order & Next', and 'Complete Order'.

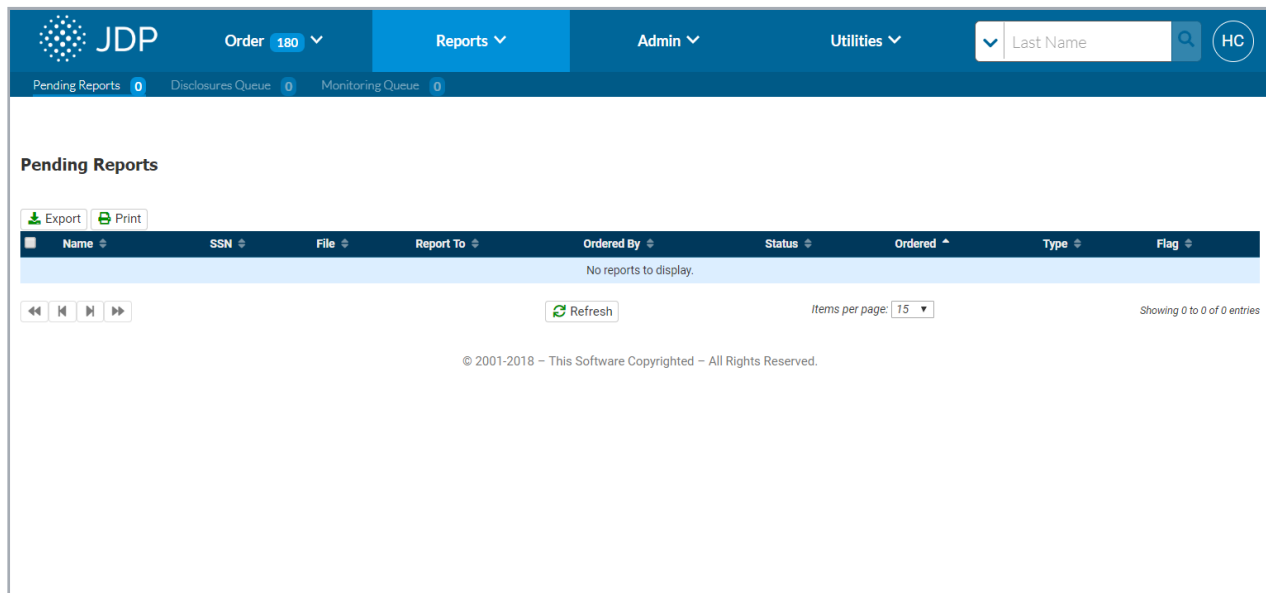
REPORTS TAB

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.



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 JDP Reports Tab interface. At the top, there is a navigation bar with the JDP logo, menu items for Order (180), Reports, Admin, and Utilities, a search bar with 'Last Name', and a user profile icon for Heidi Clemens (HC). The main content area is titled 'Report Results - #3542090 - DEMO, HEIDI MAE' and includes a 'Sales Demo' label for Heidi Clemens. Action buttons for View, Print, Add to Order, Request Help, and New Order are present. The 'Order Details' section shows a 'Complete' status and lists order information such as dates, file number, report to, and assigned to. The 'Applicant Information' section provides personal details for DEMO, HEIDI MAE, including email, address, and SSN/DOB. The 'Search Results' section contains a table of search results, all marked as 'Complete'. The 'Attachments' section shows no attachments, and the 'Disclosures and Forms' section has a dropdown menu for selecting a document to view or email.

| Search | Status |
|---|----------|
| County Criminal Records Search | + |
| PA-ALLEGHENY (DEMO, HEIDI MAE) | Complete |
| State Criminal Court Search | + |
| PENNSYLVANIA (DEMO, HEIDI MAE) | Complete |
| Federal Criminal Records Search | + |
| PENNSYLVANIA WESTERN (DEMO, HEIDI MAE) | Complete |
| National Criminal Database Alias Search | |
| NATIONWIDE (DEMO, HEIDI MAE) | 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 based on your company.

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 '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 fields for 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'. A 'Cancel' button and a 'Save' button are located at the bottom right of the form.

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 'Report Decision Report' form in the JDP Utilities tab. The form includes the following fields and options:

- Start Date:** Nov 1, 2018
- End Date:** Nov 30, 2018
- Search By:** Complete Date, Decision Date
- Decisions:** All Decisions, Approved (per client specifications), Pending (per client specifications), Withdrawn
- Clients:** All Clients, Sales Demo
- Include Sub-Clients:**
- Search:** Search button

The JDP logo and navigation menu (Order 180, Reports, Admin, Utilities) are visible at the top. A search bar with 'Last Name' and a user profile icon 'HC' are also present.

FREQUENTLY ASKED QUESTIONS

Order Entry

Q: Why do I need to input the Social Security number on the initial Order Entry page?

A: The Social Security Number field is the basis for your entire order. Using this number, The JDP Platform develops a list of names and addresses reported and return them in a "grid" that can be used to make criminal search history requests. This grid allows you to see addresses and names that your applicant may not have provided. The grid will only appear if you have a Social Security verification and public records search included with your order.

Q: I need to run a package and include a search that is not part of that package. Can I select a package and an individual search at the same time?

A: Yes. Package selection and Individual Search Component selection can be done at the same time provided the search is listed in the individual search component list. You can also add additional searches to the package by clicking the Add a search button on the Order Summary page.

Q: I made an error during my Order Entry, but I caught it before I submitted my search. How do I fix this before submitting my order request?

A: Continue with the Order Entry process until you reach the Order Summary page. This page allows you to review the contents of your order before you submit it for processing. For each section of your order, there will be a small Edit button in the gray section header. By clicking the button, you may safely return back to the section that you wish to correct or edit. The only item that cannot be changed during the Order entry process is the Social Security number. If you need to change this number, please call Customer Service within 24 hours of submitting or entering your order request. DO NOT use your Internet browser's Back button during the Order Entry process. Doing so will cause transmission errors during your order.

Order Viewing

Q: How long does a Background check take to complete?

A: The Social Security Verification is returned instantly, sometimes within seconds after ordering. Criminal backgrounds have different turnaround times. The majority of the County seat searches have a 3-5 day normal turnaround, there may be an additional 1-5 days if an on-site search has to be conducted. Some courts are faster than others and we are at the mercy of the court. Verification searches must be researched manually, and may take 24-72 hours to complete. Delays in verifications will be indicated in the JDP Platform system. For specific turnaround times on your report, please contact Customer Service.

Q: My order does not have a county search. How can I fix that?

A: You can still add on the missing component to your order. When you log in, click on Reports, and pull up your existing order. Once the order is pulled up, click on the Add a search button at the top of the subject's information. You will then go back to the Summary screen where you can verify the searches you ordered. Click Submit to submit the search. You will get a message saying your order has been successfully submitted.

FREQUENTLY ASKED QUESTIONS

Administration

Q: How do I change my password?

A: Click on your name in the top right corner and select, "My Profile". Under Security tab, you are able to change your password using the criteria provided.

Q: I would like to receive e-mails letting me know when my reports are complete. How can I set this up?

A: Contact Customer Services and we will edit the settings. You can choose from receiving email notification after every search is completed or after the entire order is completed.