# VERITY

*Paperless Risk Management Solution*

Client Manual

May, 2016

# VERITY

*Paperless Risk Management Solution*

Verity requires no technical expertise. If you can use the internet, you will have no problem customizing Verity to fit your needs.

Volunteers are able to apply online for available opportunities, which eliminates the time you spend entering applicants online, chasing volunteers for forms, updating files, storing critical documents and more.

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

Verity is secure. Both the login page and online application are protected by Go Daddy Secure Certification Authority with 128-bit encryption. The connection is encrypted using AES_128_CBC, with SHA1 for message authentication and RSA as the key exchange mechanism.

It is recommended that if you have access to background reports through Verity, DO NOT save a copy of the background report. It is also recommended that you DO NOT print out the background checks onto paper unless you have a locked filing cabinet to store them. It is recommended that you shred documents that contain any sensitive identity information when the time comes to dispose of the documents. These measures will help reduce the risk of identity theft and information falling into the wrong hands.

Verity is a paperless risk management solution that helps you manage your background check program completely online, making the whole process run efficiently.

Verity is priced for small and large organizations to afford. Four bundles are available, including extra discounts for annual payment plans.

# Contents


| | Bundle 1 | Bundle 2 | Bundle 3 | Bundle 4 |
|---|---|---|---|---|
| **SCREEN** | | | | |
| Background Checks (sold separately) | ✓ | ✓ | ✓ | ✓ |
| Child Safety Training | ✓ | ✓ | ✓ | ✓ |
| Rescreen Notifications | ✓ | ✓ | ✓ | ✓ |
| Volunteer Tracking | ✓ | ✓ | ✓ | ✓ |
| **AUTHORIZE** | | | | |
| Online Background Consent Form | | ✓ | ✓ | ✓ |
| Customized Legal Agreement | | ✓ | ✓ | ✓ |
| eSignature Authorization | | ✓ | ✓ | ✓ |
| Custom Branding | | ✓ | ✓ | ✓ |
| Online Payment Option | | ✓ | ✓ | ✓ |
| **PROCESS** | | | | |
| Online Application Form | | | ✓ | ✓ |
| Online Policy Agreement | | | ✓ | ✓ |
| Notes Tracking | | | ✓ | ✓ |
| Screening Process Management | | | ✓ | ✓ |
| Document Uploading | | | ✓ | ✓ |
| Custom Branding | | | ✓ | ✓ |
| Online Payment Option | | | ✓ | ✓ |
| **RECRUIT** | | | | |
| Volunteer Job Board | | | | ✓ |
| Volunteer Position Descriptions | | | | ✓ |
| Unlimited Leagues & Departments | | | | ✓ |
| Volunteer Contact Management | | | | ✓ |
| Activity Scheduling | | | | ✓ |
| Custom Branding | | | | ✓ |
| Online Payment Option | | | | ✓ |

Bundle #s will be displayed, throughout this guide, to indicate availability. 0 1 2 3 4

## Getting Started

You will need a User Name and Password to access Verity.  Contact your system administrator for this information – The system admin will receive this information by email from one of our Customer Service Representatives.

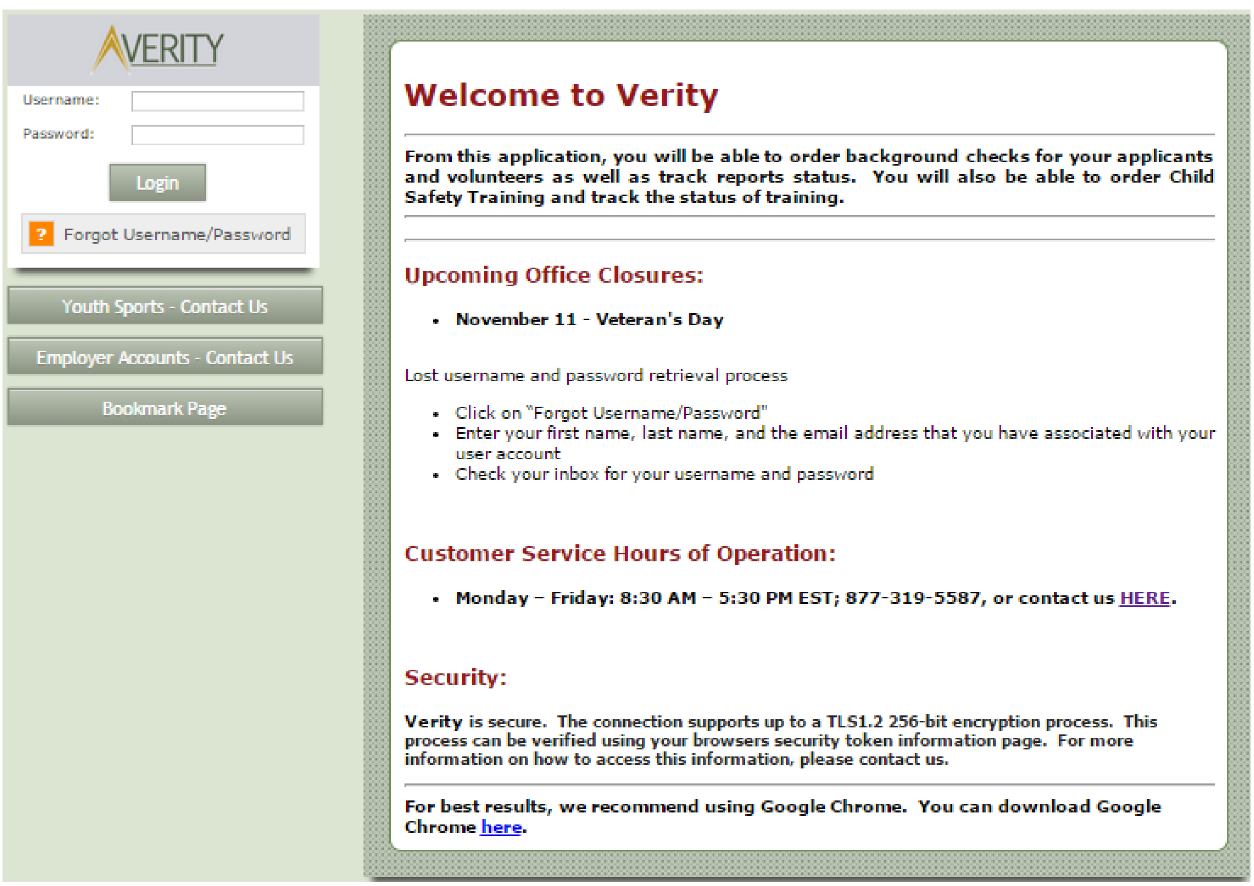
Verity works best with Chrome, but is compatible will all browsers (Safari, Mozilla Firefox, Google Internet Explorer, etc.).

We have Live Chat available on all pages of our website to provide you with fast customer service and the ability to view your screen if you experience difficulty using Ministry Mobilizer.   To begin a chat, simply click on the "Chat Now" icon in the lower right hand corner of your screen and then enter your information.  The next available agent will be right with you.

## Login

Go to: [https://www.averity.com/login/](https://www.averity.com/login/)

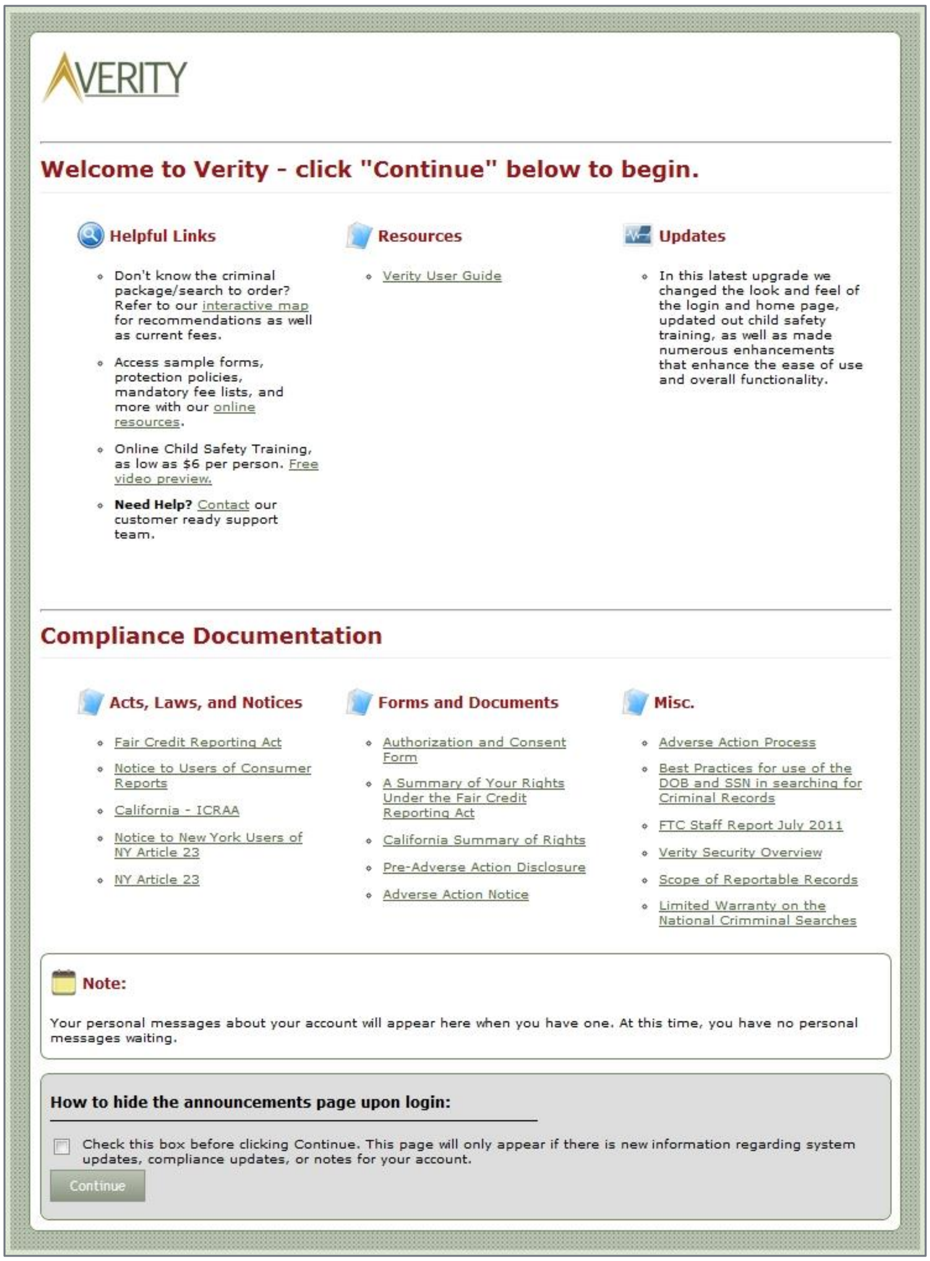
Your login credentials are case sensitive. If you or any of your users forget their username and/or password, you can have them retrieved using the "Forgot Username/Password" button. This is also where we will announce the dates our office will be closed.



# Home Page

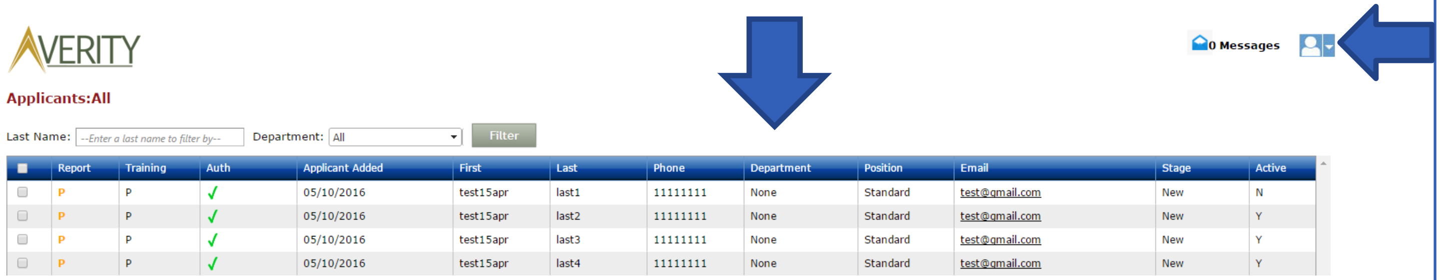
The Home Page has all announcements and information regarding system updates, compliance updates, training manuals, links and resources pertaining to background checks and notes for your account.

Check the box, at the bottom of the page, before clicking Continue, if you do not want to see this page upon subsequent logins. If there are new notes for your account or new announcements, this page will show again.



## Welcome!

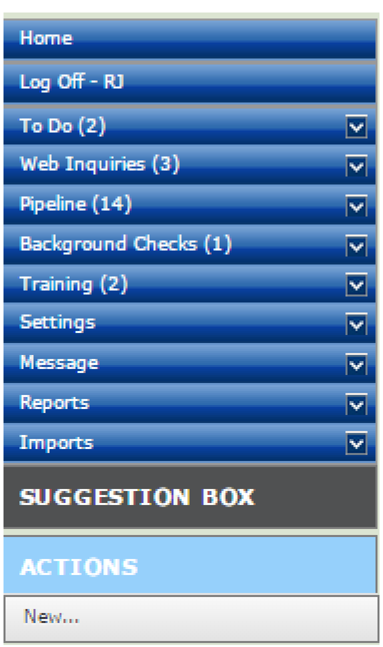
The first page you will see after logging in is your Applicants page. From this page, you can view all of your applicants and see at a glance, the status of their reports and training. Each area of the grid can be sorted by clicking on the column name (the background of the tab will change to white) and further sorted by clicking on the arrow to display by ascending or descending order.




You will also notice a message icon in the upper right hand corner of this page. This Messages icon represents any currently unread messages for your account. We will send you product updates, legislation news and other important information via this messaging application. Clicking on the messages icon will open all available messages. You will not be able to delete any messages. We will create an expiration date for each message at the time it is sent to you thereby removing it from your inbox at a later date.

Next to the message icon you will see the My Account icon. From here you are able to view your account details, organization details and what bundle you are on. You can also view your opportunities link (Bundle 2 and higher) and look up your invoice history (if user permission is granted).

## Menu




The Menu will appear on the left hand side of all pages within Verity - allowing you to navigate quickly through all of the features and processes. Clicking on an item in the Menu will open a drop down tab of available options.

## Entering Applicants [0 1 2 3 4]

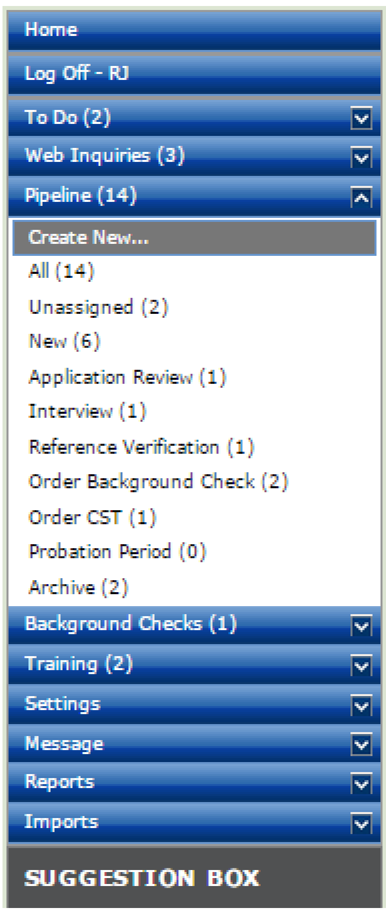
You must have an authorization, in writing, from the applicant when requesting background reports. All files should be stored in a secure area. We have a sample form that you can use,

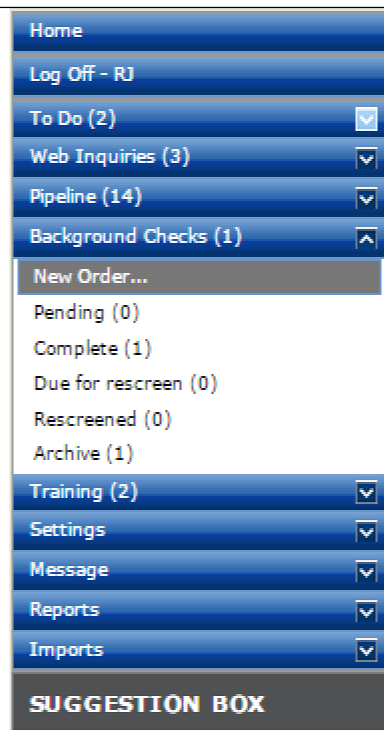
http://www.averity.com/resources.

There are 2 places to add a new applicant.

- From the Main Menu, select Pipeline, next click Create New. [2 3 4]
- From the Main Menu, select Background Checks, next click New Order. [0 1 2 3 4]

If you choose to enter an applicant in your pipeline, you will still need to go back to that applicant at a later time if you wish to order a background screen for them. You can do this by placing a check box next to their name in the pipeline and selecting 'Order Background Check'.



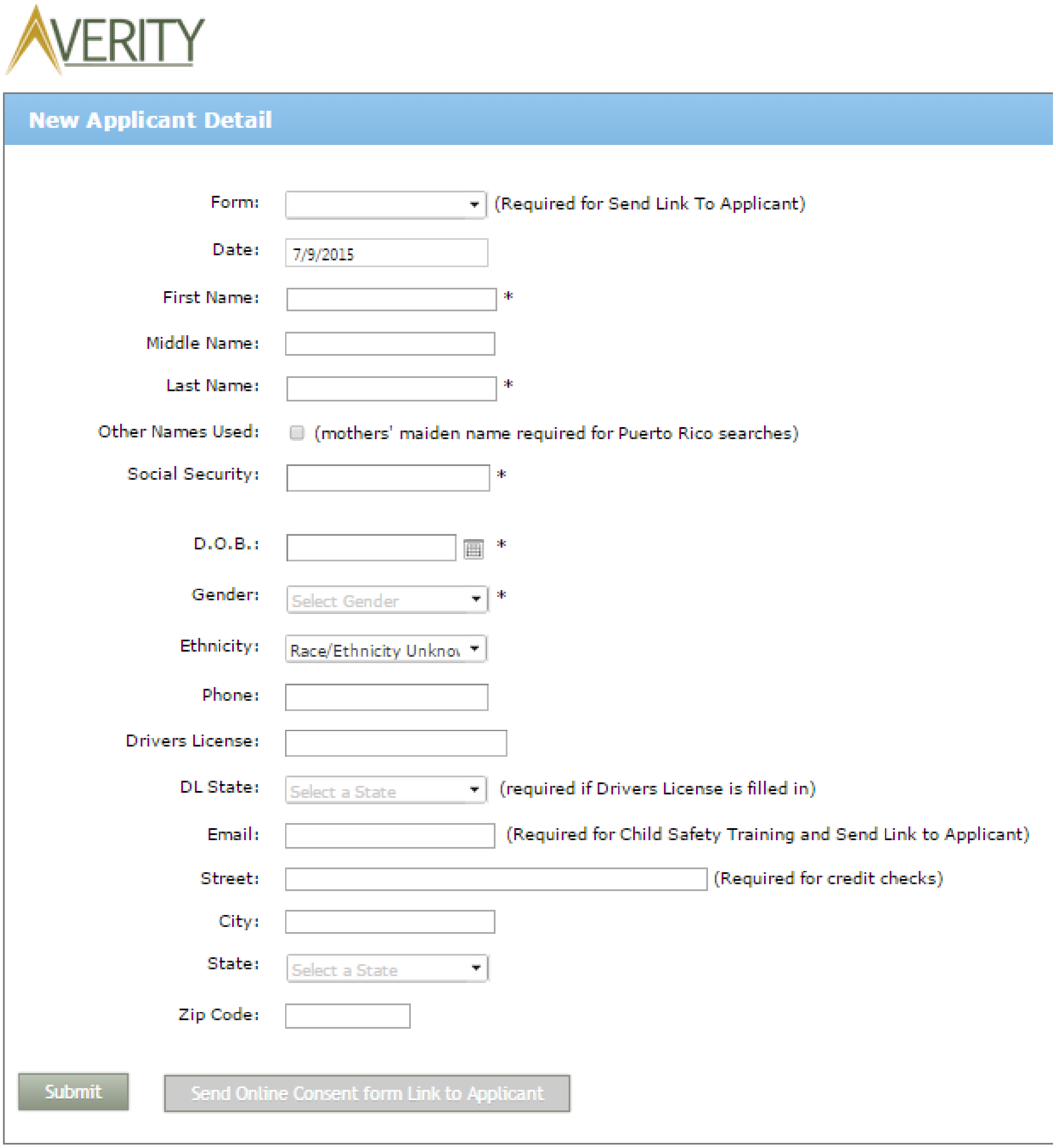



The required information is noted with an asterisk (*).

Formatting is important when filling out this form, please follow the examples given.

If you are planning to order the child safety training, an email address is required.

For Puerto Rico searches, you must have the applicant's mother's maiden name included in the other names used field of the applicant details.


VERITY

New Applicant Detail

Form: (Required for Send Link To Applicant)

Date: 7/9/2015

First Name: *

Middle Name:

Last Name: *

Other Names Used: (mothers' maiden name required for Puerto Rico searches)

Social Security: *

D.O.B.: *

Gender: Select Gender *

Ethnicity: Race/Ethnicity Unknow

Phone:

Drivers License:

DL State: Select a State (required if Drivers License is filled in)

Email: (Required for Child Safety Training and Send Link to Applicant)

Street: (Required for credit checks)

City:

State: Select a State

Zip Code:

Submit

Send Online Consent form Link to Applicant

After clicking Submit on this form, you will automatically be directed to the background check ordering pages.

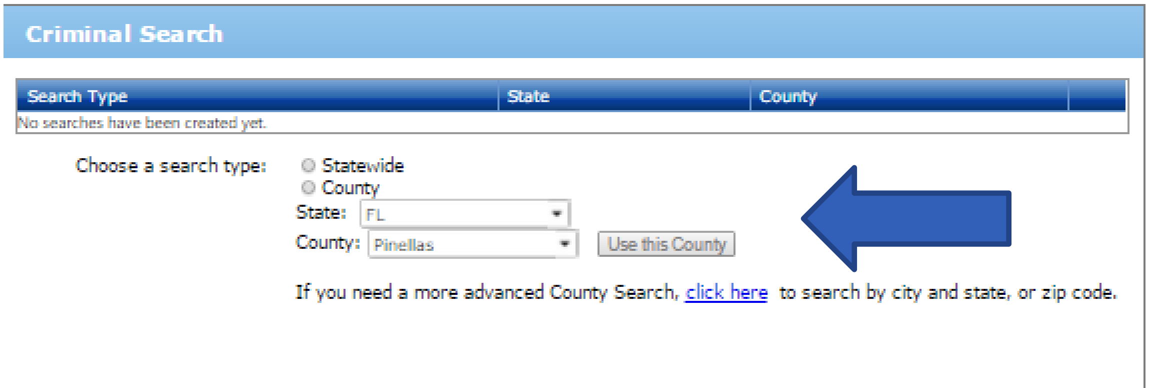
## Ordering Background Checks 0 1 2 3 4

To Order: Menu>Background Checks>New Order>Enter Applicant Details>Submit

Before ordering the background checks, you will need to know what services or package you want to order. Certain types of checks will require specific information and a pop up window will remind you if additional information or a separate consent form is required.

- If you need a court search (Plus package), you will need to know the state and/or county to search.
- If you need help with ordering, we can make recommendations for you, please call Customer Service or start a Live Chat with an agent.
- If you need an alias name search, check the box (additional charges apply).
- If your organization uses billing references, please select one for your order (we will subtotal your invoices by these billing references for your convenience).

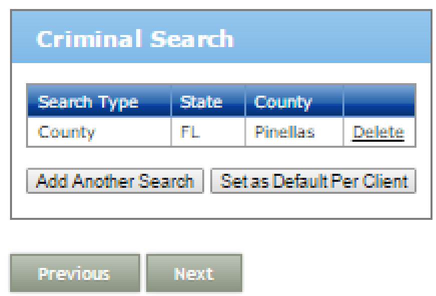
If you are ordering a Plus Package or an a la carte criminal search, you will need to select either "County" or "Statewide" for the type of court search you are ordering. We will automatically provide you with the state or county based on the address submitted but you may choose a different state or county from the drop down menu as desired.




After choosing Statewide or County and the 'Use this County or State' button, a page will pop up asking you if you want to add another search or set this search as your default. If you plan to order the same Statewide search or same County search on all of your applicants, setting this search as your default will pre-populate future searches with these options. You can change them with any future orders.

If you are adding an additional county to search, click Add Another Search and then select the county you wish to add to the order.

AVERITY




- For Statewide and/or County searches, additional fees may apply. [Please review the current mandatory court fee lists.]
- For Puerto Rico searches, you must have the applicant's mother's maiden name included in the other names used field of the applicant details.

If you select a search that has a specific requirement (such as a consent form is required with a GA statewide search) a pop up window will remind you to supply the information. Click Next to go to the Summary screen, review the summary of your order, make sure applicant information is correct and make sure the searches you are ordering are correct. You will then need to certify that you agree to adhere to all legal requirements before submitting your order.

## Summary

**For the following Applicants:**

| First | Last | Date of Birth | Social Security Number |
|---|---|---|---|
| Example | Background Check | 11/11/1991 | 111-11-1111 |

**You are about to order the following services:**

Package: Plus

Services:

- National Criminal Database Search
- Criminal Search (1): Statewide for SD
- SSN Verification & Address History
- National Sex Offender Registry Search

## Fair Credit Reporting Act – Client Certification

By requesting a background check report from Protect Youth Sports you certify the following:

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

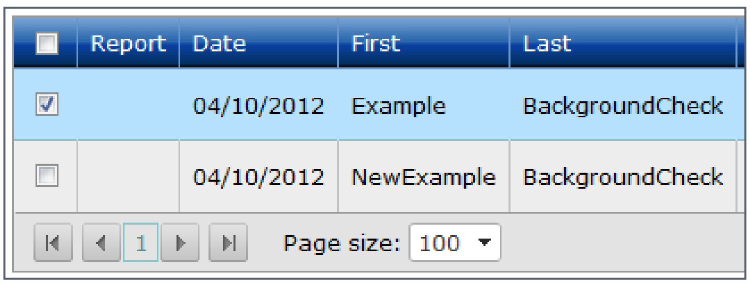
☐ Click here to certify that you have secured written authorization and will adhere to these legal requirements

Previous | Submit For Background Check

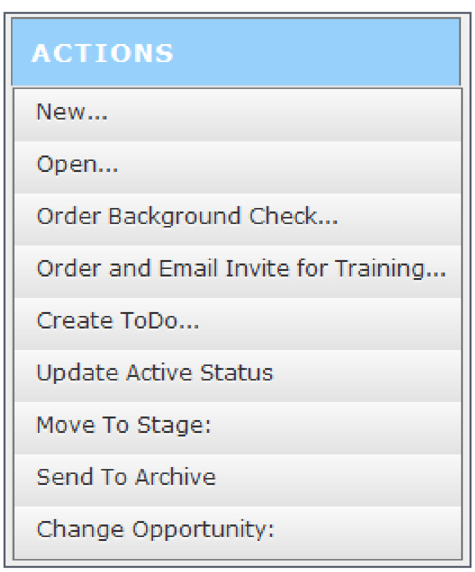
If you ordered a Statewide, County, and/or MVR search, additional fees may apply. Please review the current mandatory court fee lists.


- **Do not click the Submit button more than once; doing so may create two separate orders and extra charges to your account.**
- **Background checks can take 24-48 hours to complete.**
- County and statewide searches may take longer because they depend on court schedules and field researchers.

To order from your applicant list in the Pipeline: [2,3,4]




From the Main Menu, select Pipeline and the group of applicants you want to access.




Mark the check box of the applicant you want to order a background report for, this will highlight their row blue.

- To order multiple backgrounds at once, mark the check box of all the applicants you want to order a background report for.

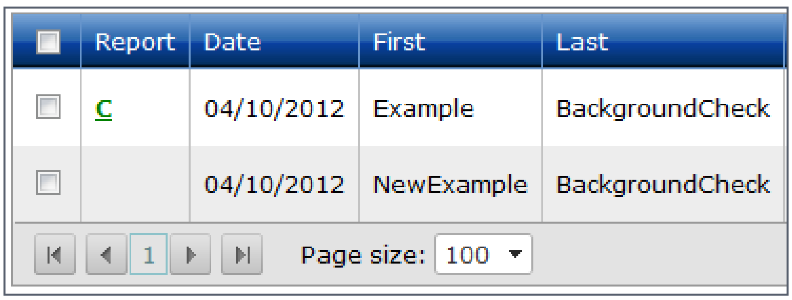
After marking the check box(es) of the applicants you want to order a background report for, select the Order Background Check option in the Actions menu.

Follow the Background Check Ordering instructions, beginning on page 9 of this manual.

## Viewing Background Reports [0,1,2,3,4]

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

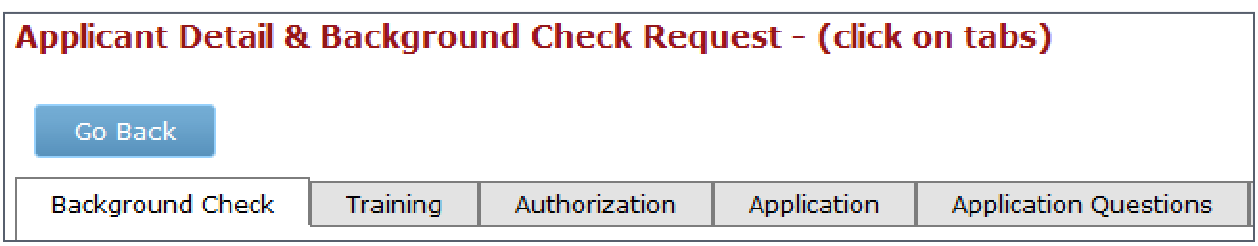
1. The first is straight from the Background Checks from the Main Menu, then select Complete. The first column on the grid is Report, when the screening is complete, a GREEN C will be displayed. Simply click on the C to view the background report.



| | Report | Date | First | Last |
|---|---|---|---|---|
| | C | 04/10/2012 | Example | BackgroundCheck |
| | | 04/10/2012 | NewExample | BackgroundCheck |



2. Another way to get the background report is to Open the applicant's file; by marking the check box next to the applicant's name and then selecting Open in the Actions menu. Go to the Background Report tab and click on the link to the background report. If the screening is still pending, it will display the requested date instead of a link.




You can also choose the applicant(s) you want to view, by clicking on the box to the left of the name(s), and choosing Print Report from the Actions menu.

3. The final way to view the background report is straight from the Pipeline (The Pipeline is a service only offered to Bundle 2-4 accounts). The first column on the grid is Report,

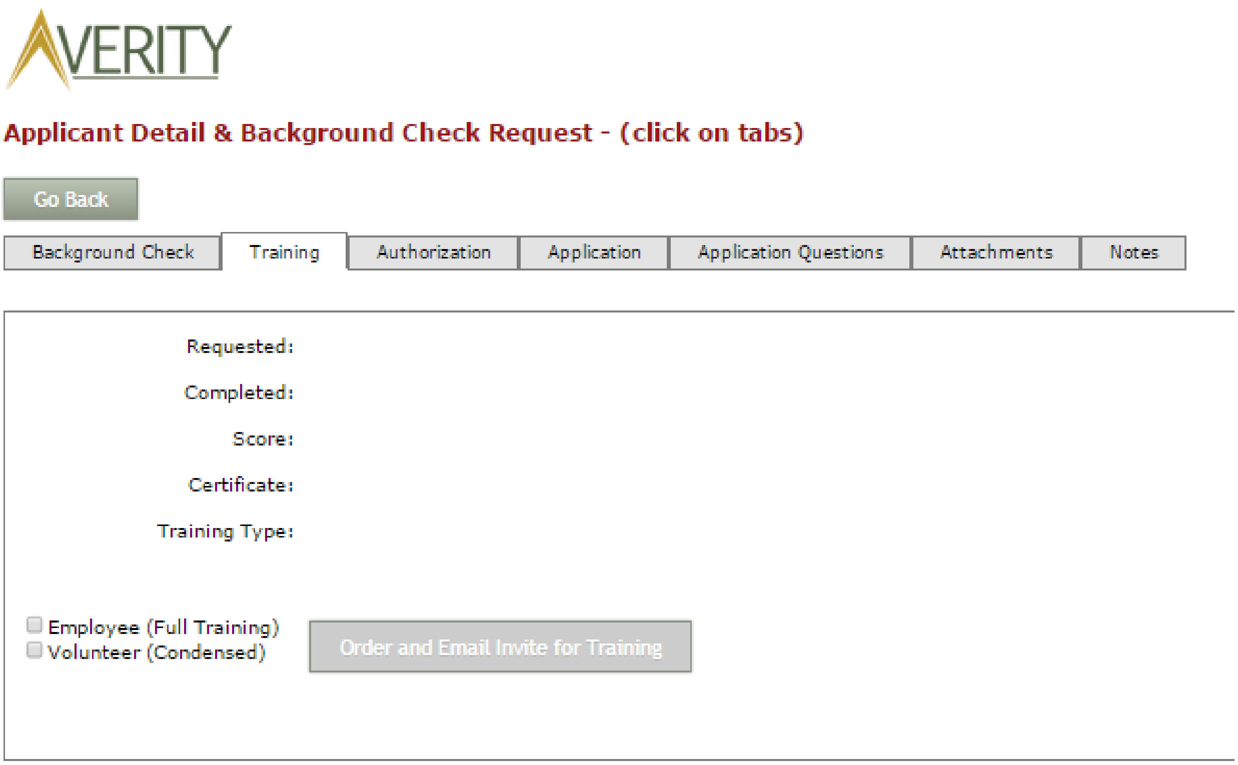
when the screening is complete, a GREEN C will be displayed. Simply click on the C to view the background report.

It is recommended that you Archive the report once it has been viewed. Archiving the report will also archive any applicant data that is in the Pipeline.

## Child Safety Training [1] [2] [3] [4]

This is an online video course and quiz. You must have a valid email address for your applicants.

There are two versions: Employee (full training), Volunteer (condensed version). You must have a valid email address for your applicants.  Go to “Training” and select “New Order”. After entering your applicant’s information, click submit.  You can use all 1’s and a false DOB if necessary but all fields with an asterisk are needed to complete the form. You will then see the option to order a version of the training.




Once you have selected a version and click on “Order and Email Invite for Training”, your applicant will be sent the link to watch the video and complete the test. From the main screen you can check the status of your applicant’s child safety training in the Training column. Once a test is complete, you can click on the green “C” to view the certificate.  Applicants also have the option to view their questions/answers upon completing the test. For complete instructions, please see the Child Safety Training Product Overview & User Guide

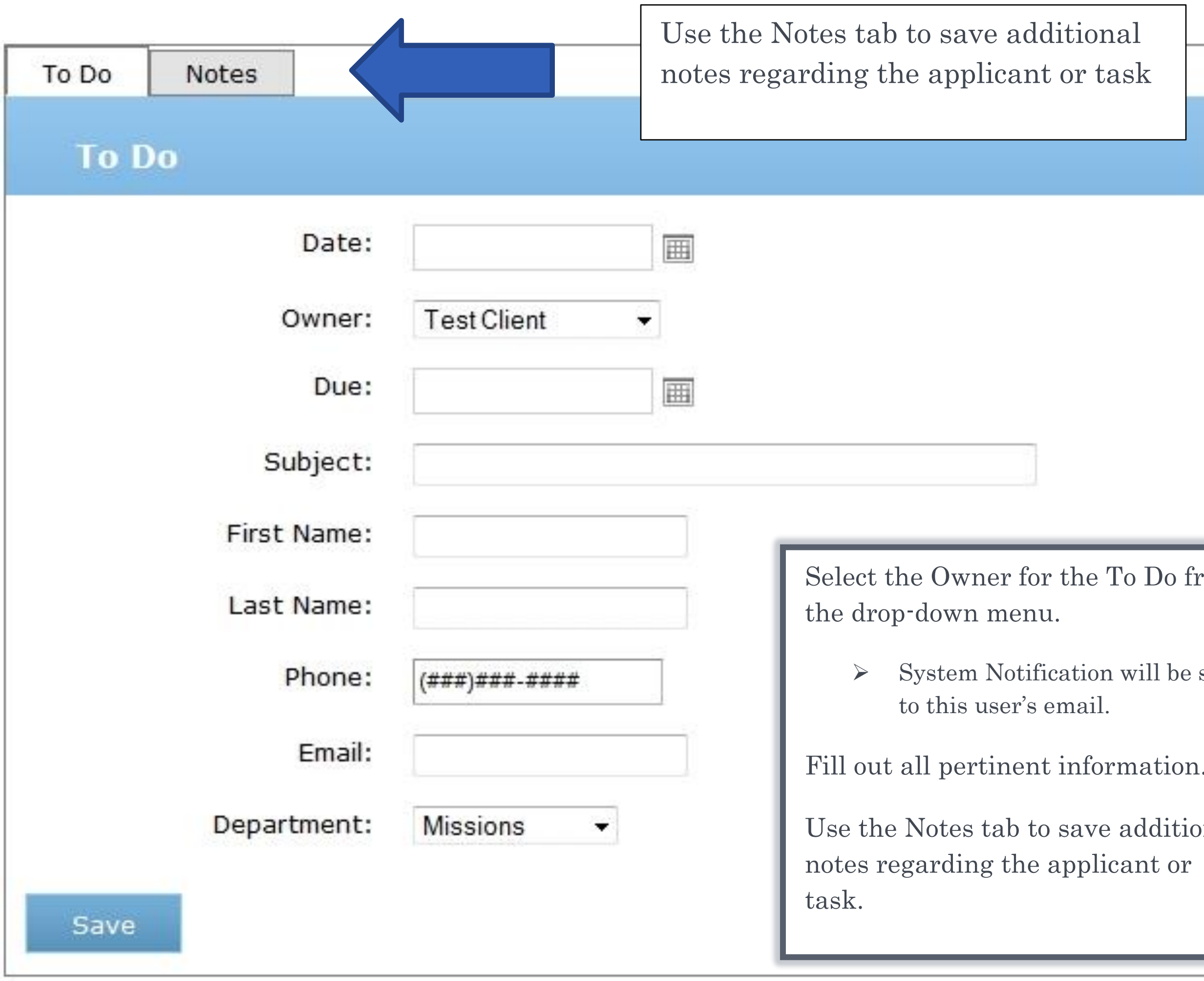
## To Do [4]


Use the To Do function to schedule a follow-up activity with a prospective volunteer.

From the Main Menu, select To Do.

- This can also be accessed through the Check box and action menu.

Use the Notes tab to save additional notes regarding the applicant or task




Select the Owner for the To Do from the drop-down menu.

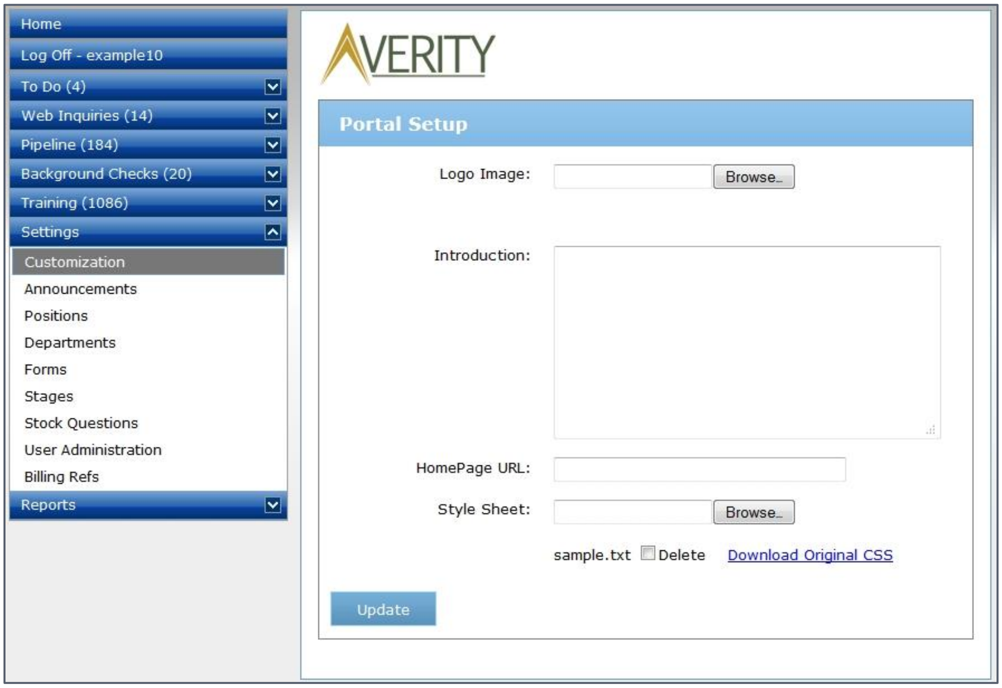
- System Notification will be sent to this user's email.

Fill out all pertinent information.

Use the Notes tab to save additional notes regarding the applicant or task.

# Customization [2,3,4]

From the Main Menu, select Settings and open Customization




Logo Image: [4]

Upload your logo to the size of 300 pixel width.  This works best in JPEG format.

Introduction: [4]

Type in an introduction to your available opportunities job board.  Formatting is controlled by HTML code.

Style Sheet: [2,3,4]

This refers to the Cascading Style Sheet (CSS), used to edit the look and formatting of the application webpage.

Click the link to download the original CSS.  Make your changes, save to your computer, and click Choose File to upload your new CSS.

HomePage URL: [4]

Enter the web address for your organization's web site.  This is not required.

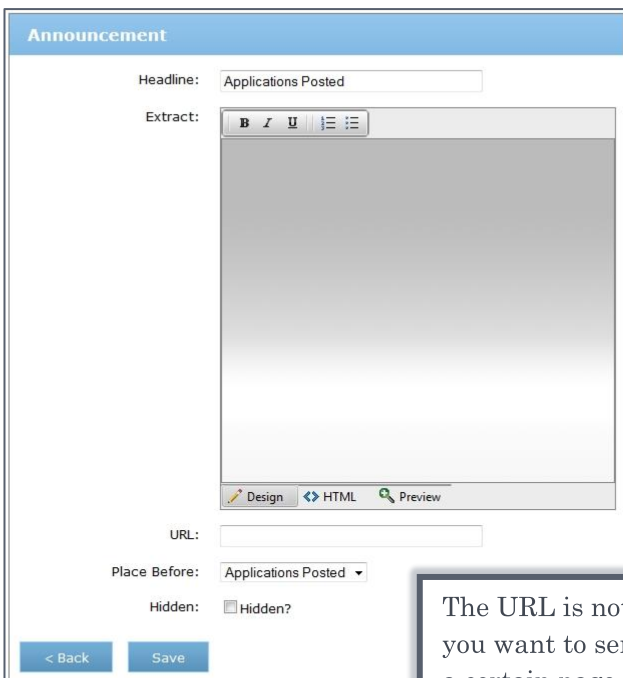
## Announcements [4]

From the Main Menu, select Settings and open Announcements


Click Add or Edit to create/edit an announcement.

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

If, at any time, you don't want certain announcements to show up on the webpage, simply check the Hidden box.



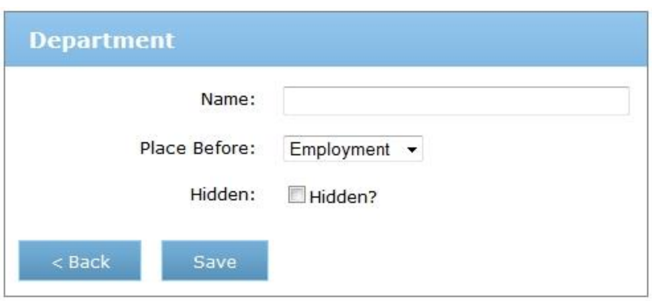

The URL is not required; however, if you want to send your applicants to a certain page on your website, to get more information, insert that link

## Departments [4]

From the Main Menu, select Settings and open Departments


Click Add or Edit to create/edit a department.

- Please check with the system administrator before you add or edit departments. It is essential that you keep department names consistent across all avenues of communication.

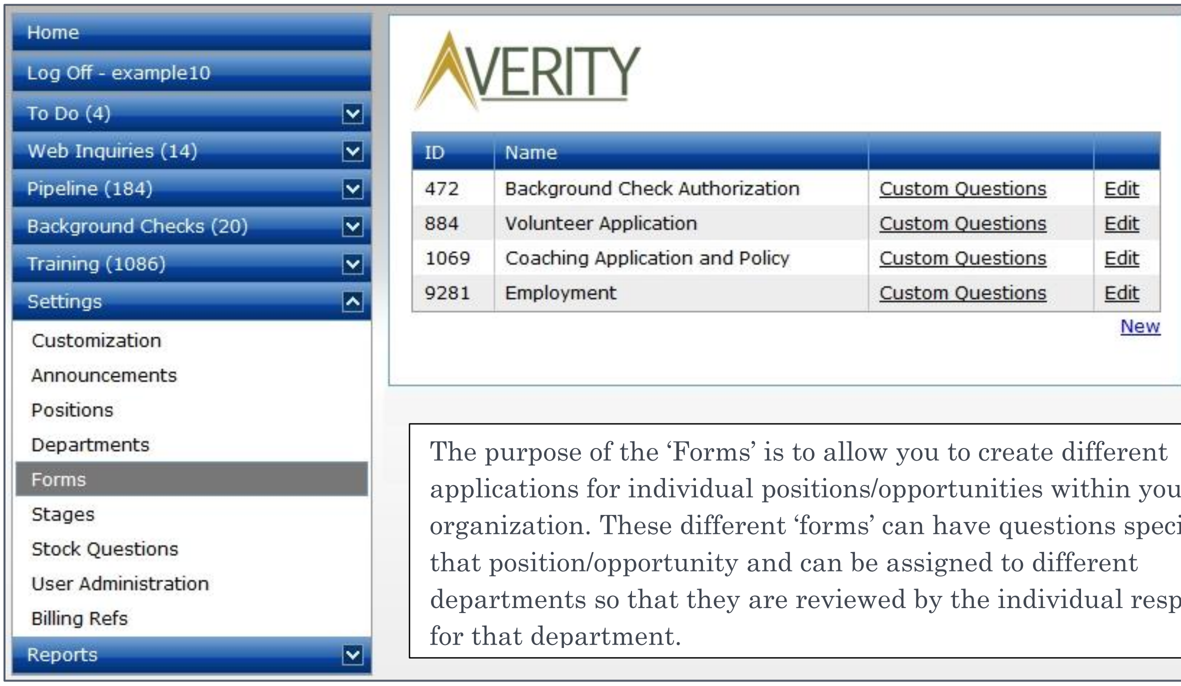



Departments will appear in the default order in which they were created. To re-order the departments, use the Place Before drop-down menu.

If, at any time, you don't want certain departments to show up on the webpage, simply check the Hidden box.

## Creating and Editing Forms [2,3,4]

From the Main Menu, select Settings and open Forms




The purpose of the 'Forms' is to allow you to create different applications for individual positions/opportunities within your organization. These different 'forms' can have questions specific to that position/opportunity and can be assigned to different departments so that they are reviewed by the individual responsible for that department.

Edit: [2,3,4]

The authorization text is what your applicants will agree to, when submitting their application. You can either use the text we have provided, add or substitute with your own in reference to your policy.

Custom Questions: [3,4]

Create and ask additional questions of your applicants.  There are 5 types of questions you can create:

1. Yes/No
2. Dropdown
3. Short Answer
4. Long Answer
5. Instruction Only.

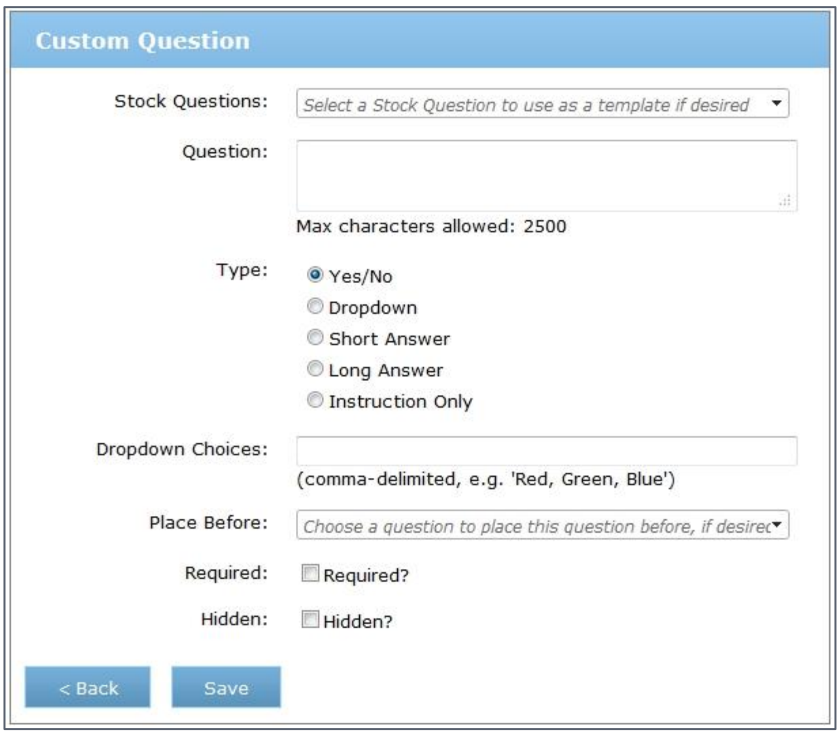
➢ If there are questions you will use in multiple forms, or multiple times in one form, we suggest adding Stock Questions (in the Settings Menu), to simplify the process of creating your application questions.

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

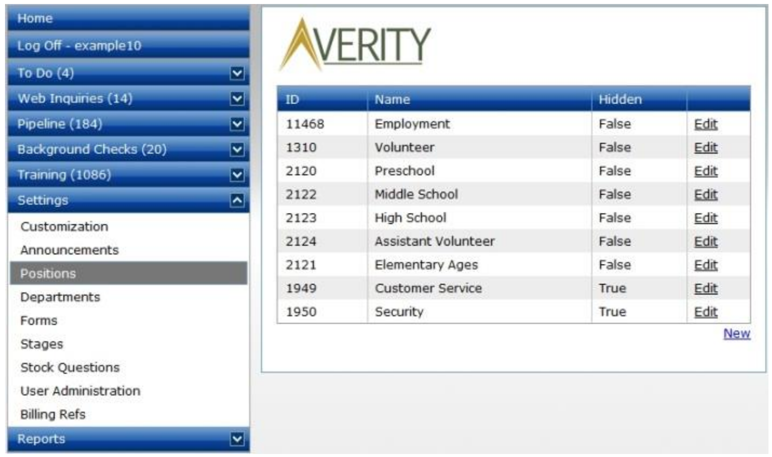
Aside from Yes/No questions, none of the questions are required to be answered before moving on in the application. Check the Required box to make sure applicants answer all necessary questions.

If, at any time, you don't want certain questions to show up on the application, simply check the Hidden box.

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

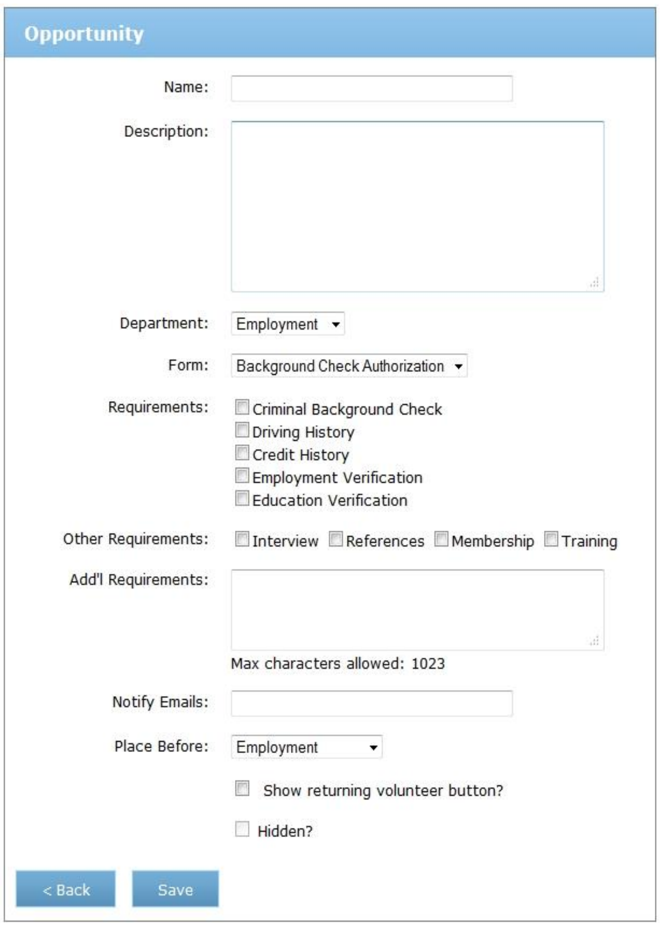


# Positions [4]




From the Main Menu, select Settings and open Positions

Click Add or Edit to create/edit a position.




Enter the name of the position.

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

Choose the Department that the Position is associated with.

Choose the Form that goes with the Position.

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

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

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

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

If, at any time, you don't want certain positions to show up on the webpage, simply check the Hidden box.

## Deleting/Renaming Forms, Positions, Departments

Deleting is not an option at all in Verity.

Editing and renaming are available options.

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

If your department decides to rename the "Umpire" to "Referee," and the description/position is the same, then the name can be changed.

When a Form/Position/Department is renamed, all past applicants will have their forms/positions/departments changed also.

If the "Umpire" is changed to "Trainer," then all past applicants will change from Umpires to Trainers.

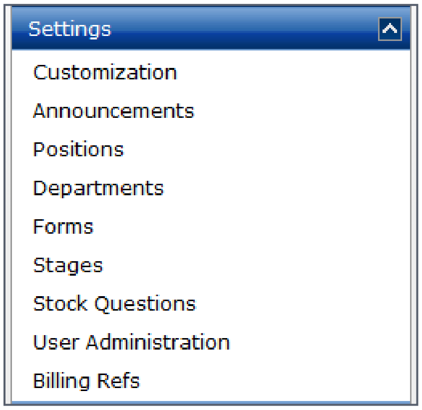
If you need to get rid of a Form, Position or Department, check the Hidden box on the old one and add a new one.

## Pipeline Stages [3] [4]

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

- We recommend leaving the New and Archive stages, changing them will affect your workflow and applications.

Select Settings from the Main Menu and click on Stages.




| ID | Title | |
|---|---|---|
| 26 | New | |
| 27 | Programs Department | Edit |
| 28 | Stage 2 - Next Step - Reference Verifications | Edit |
| 29 | Stage 3 - Next Step - In-person Interview | Edit |
| 30 | Stage 4 - Next Step - Training for Child Abuse Prevention | Edit |
| 31 | Stage 5 - Next Step - Training for Position | Edit |
| 32 | Stage 6 - Finalization | Edit |
| 33 | Archive | |

Click on Edit

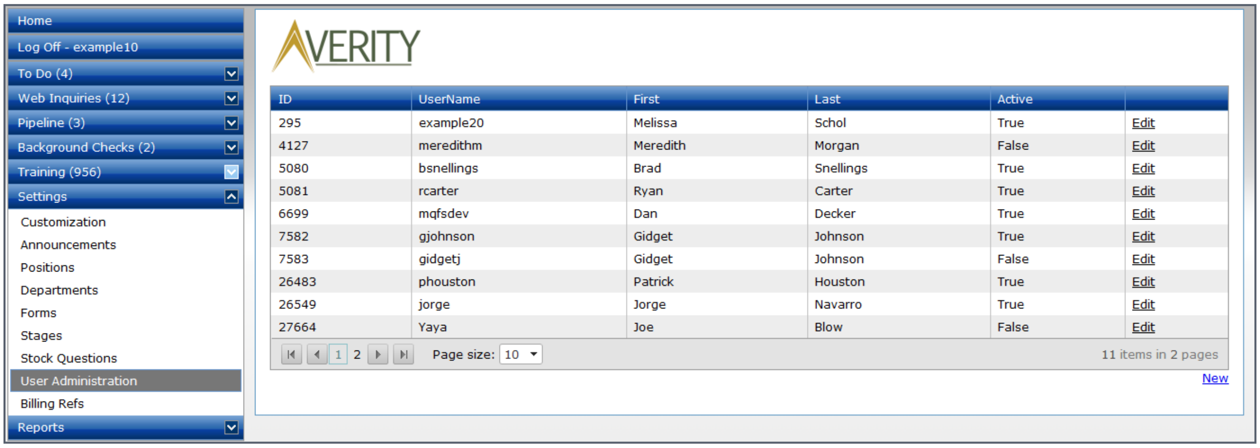
Type in the Stage name that best fits your organization's needs, click Save.


The Stage names are updated on the Main Menu, under Pipeline.

## Create, Delete and Edit Users [0 1 2 3 4]

First, click on Settings from the Main Menu. Next, click User Admin.

You can either select Edit or Delete, next to an existing user, or select New to add a new user.




Notifications are sent to users using the email address in the users' setup menu. Users are notified when:

- An application has been submitted [2 3 4]
- The background report has completed [0 1 2 3 4]
- Child safety training has completed [1 2 3 4]
- An applicant clicks More Info, Contact Us or Returning Volunteer [4]

Notification emails come from message@veritysecure.com, please set your email to accept this address. This will keep your notifications from ending up in your junk or spam email folders.

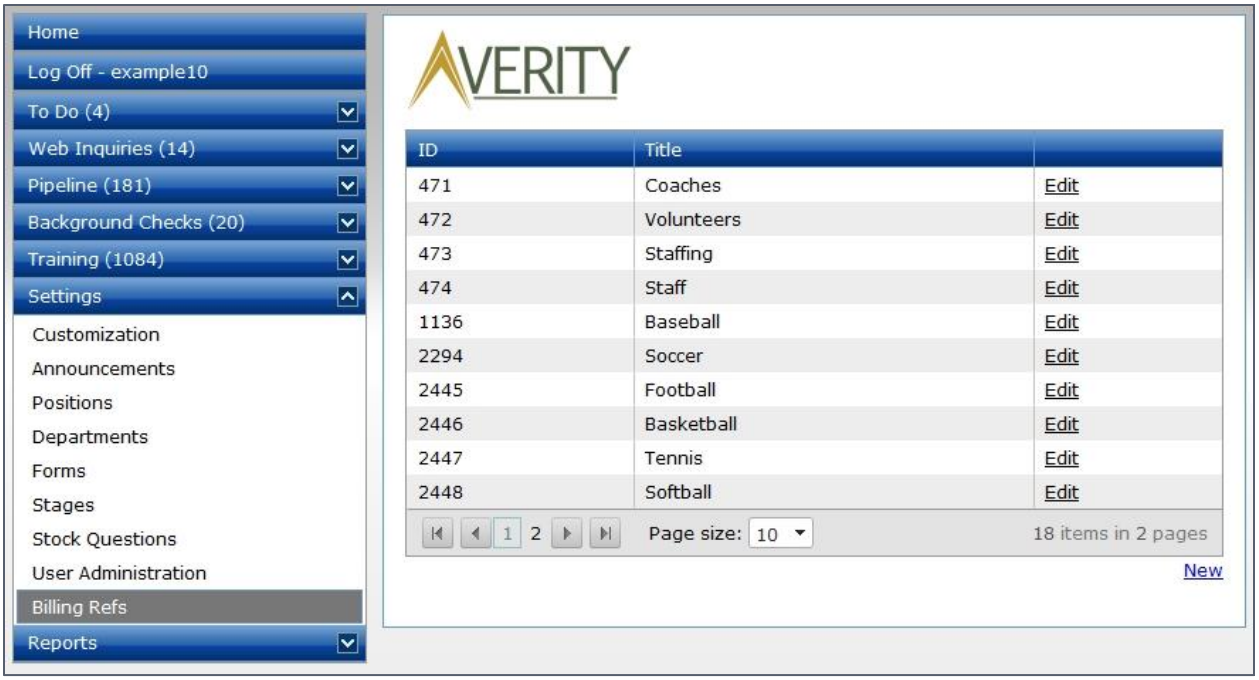

Set permissions for the user by checking and unchecking the boxes.

To deactivate a user, uncheck the Active box or if the user will never need access to the system again, simply delete the user by clicking on **Delete** next to their name and confirming when prompted that you wish to remove them from the system.

## Setting Up Billing References [1][2][3][4]

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

Select Settings from the Main Menu and click on Billing Refs.



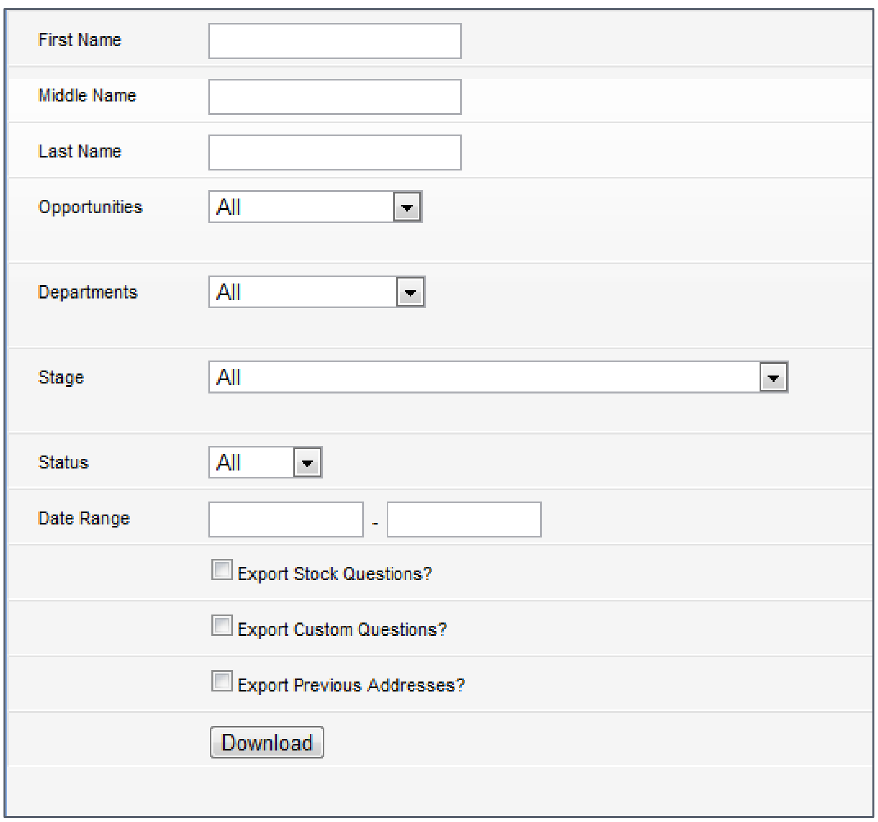

Click on New or Edit.

Type in the Billing Reference and click Save.

## Downloading Reports [1,2,3,4]

From the Main Menu, select Reports


A number of filters exist for customizing the data prior to export.



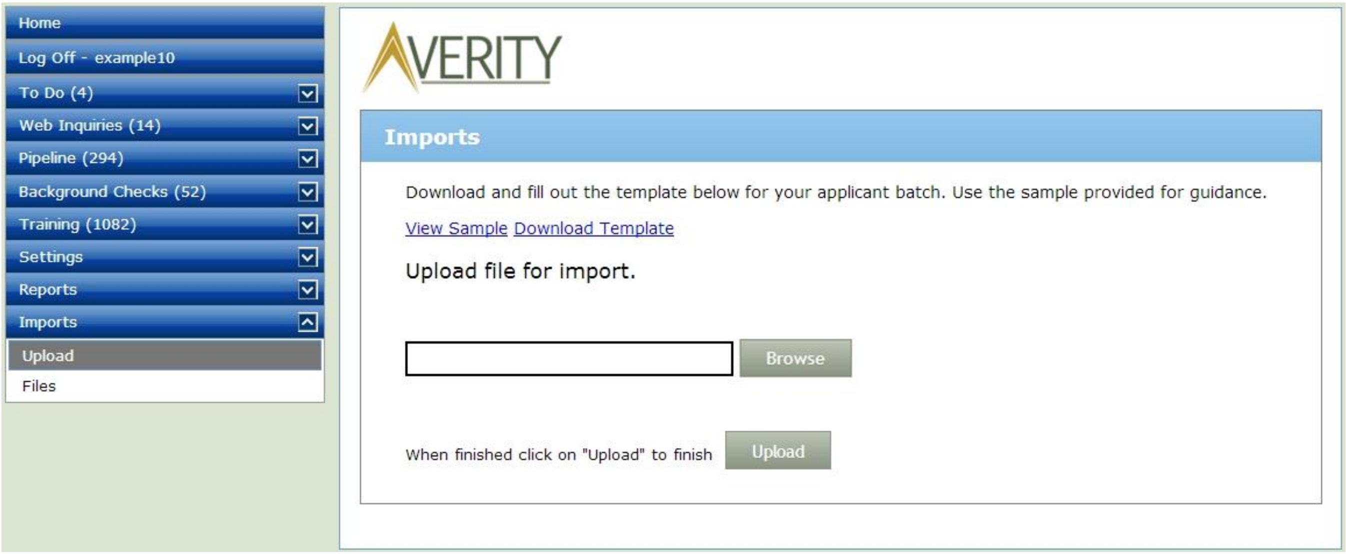

Click Download and an Excel file will be created for the data.

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

## Importing Applicants 0 1 2 3 4

You can upload batch information for many applicants at one time using the Imports feature.

From the main menu select Upload from the Imports section.




From this screen you are provided with a sample image and template for your import.

Click on browse and locate the file with the applicants' information that you wish to upload.

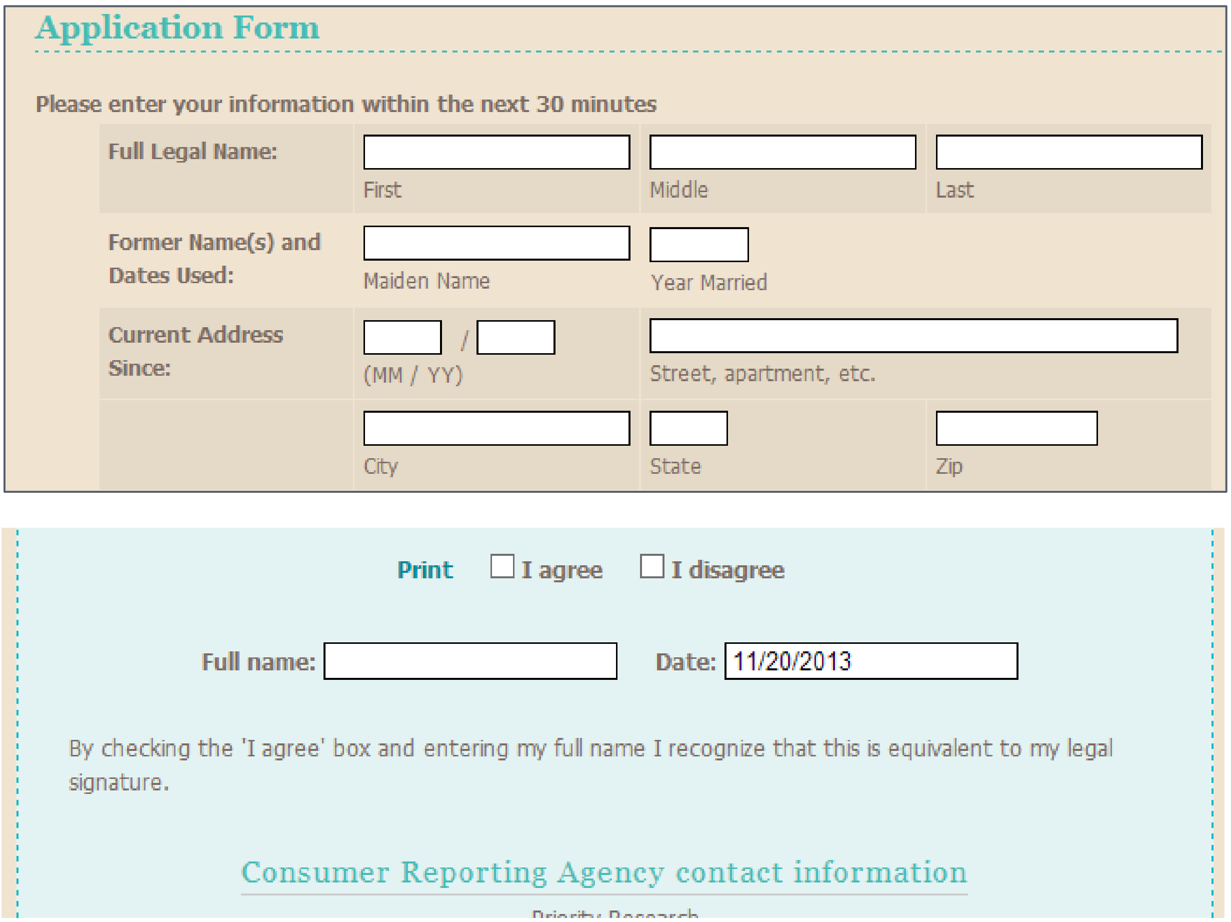
Click on upload. After your file is uploaded successfully, customer service will be notified of your upload and can begin processing your request.

Verity will store up to 5 uploads and then will replace the oldest file with the newest file. You can view and manage your uploads in Files from the Imports section.

## Online Application [2,3,4]

After signing up for Verity (Bundles 2, 3 & 4), you received a web-link to your personalized online application form. Send this link to your applicants, or post the link on your organization's website.

Should your applicant decide to decline the terms of the authorization, you will be notified via email.



**Application Form**

Please enter your information within the next 30 minutes

| | | | |
|---|---|---|---|
| Full Legal Name: | First | Middle | Last |
| Former Name(s) and Dates Used: | Maiden Name | Year Married | |
| Current Address Since: | / (MM / YY) | Street, apartment, etc. | |
| | City | State | Zip |

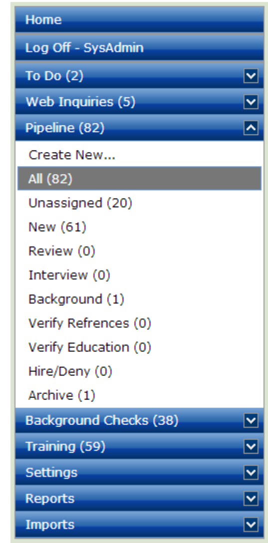
Print ☐ I agree ☐ I disagree

Full name: Date: 11/20/2013

By checking the 'I agree' box and entering my full name I recognize that this is equivalent to my legal signature.

Consumer Reporting Agency contact information

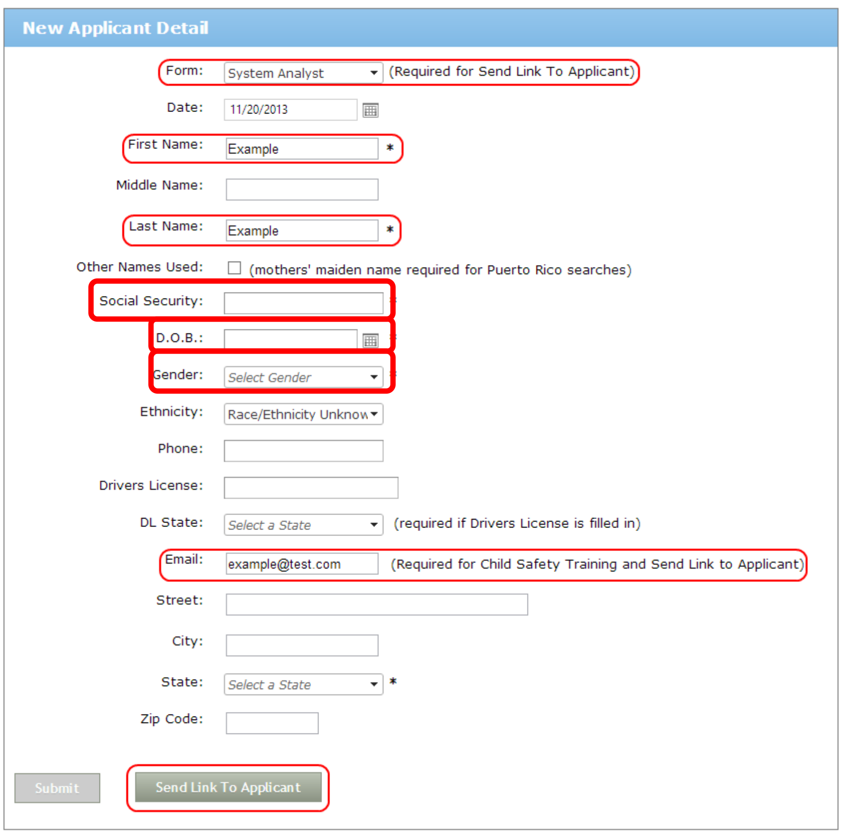
# Send Link to Applicants [2,3,4]




With an applicant's basic information, you can send your applicant(s) an email containing an applicant specific link to your opportunities page.

Begin by selecting "Create New…" from the Background Checks Menu

Next you will fill in the applicants First Name, Last Name, Gender and email address, and Form/Position you would like to use. Other required fields (SSN, DOB etc) can be filled with all 9s or 1s.




Once complete and you click the "Send Link to Applicant" Button, your applicant will receive an email containing a link. Once they have filled in the opportunities form and have submitted their information, you will receive a new applicant notification.

## Account Information

There is an account tab in the upper right hand corner of all pages. Within this tab you can update your user profile (change password, update name and email information), view organization details as well as edit- if authorized to do so, view bundle information and your organization's opportunity link (bundles 2 and higher), submit help tickets and view invoice history (with the proper permissions level).

## Suggestions

We are constantly making enhancements to Verity. If there is a functionality that you believe would be beneficial to your organization and others, please submit your idea through our Suggestion Box located in the Menu on the left hand side of the page.

Thank you,

Verity Development Team