



# Web User Guide

Get the right hire fast!

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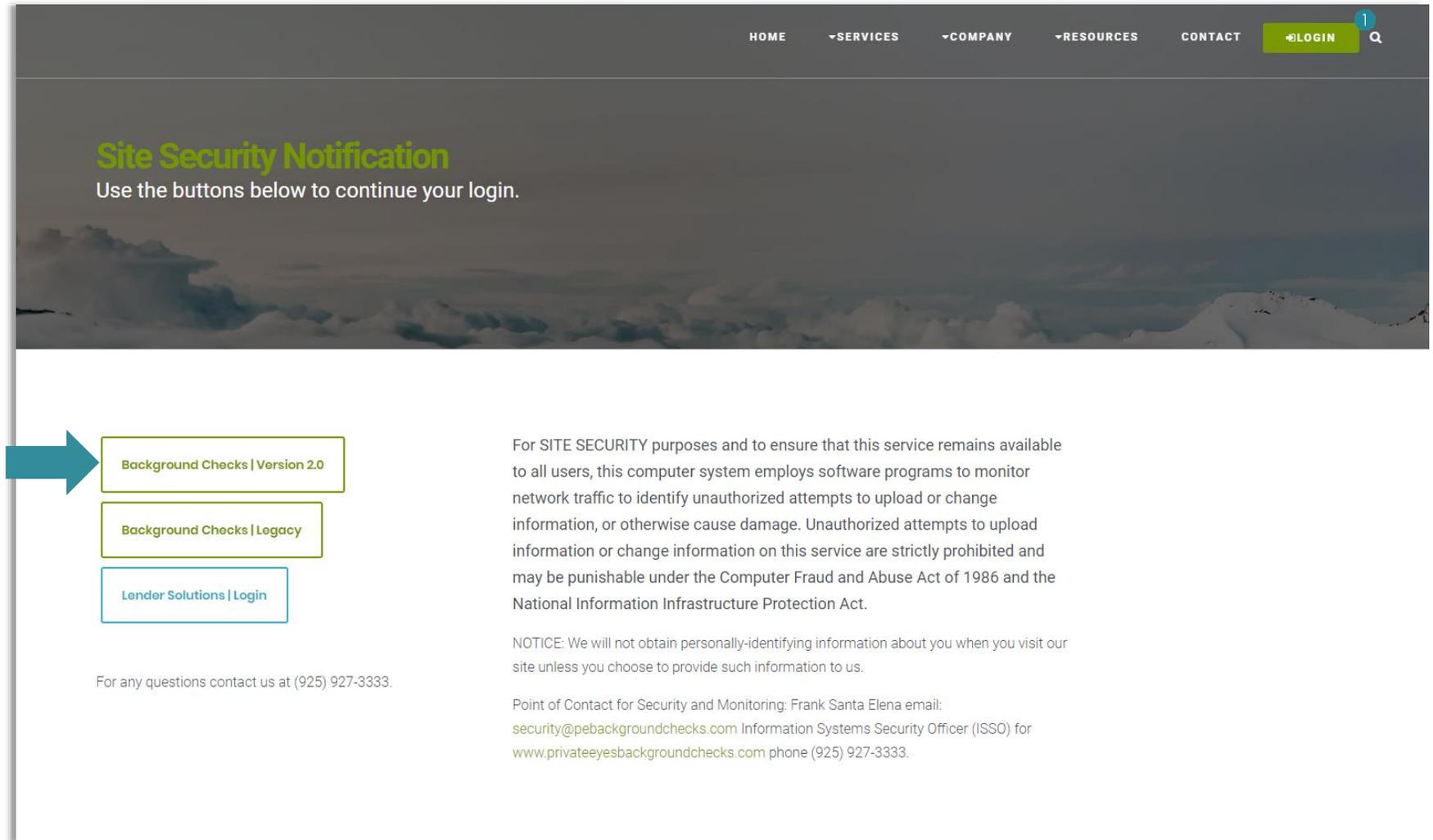
06.

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# Logging In

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1. [Click here](#) to visit our website.
2. Select “login” button.<sup>1</sup>
3. Select “Background Checks – Version 2.0.”<sup>2</sup>



The screenshot shows the website's login page. At the top, there is a navigation bar with links for HOME, SERVICES, COMPANY, RESOURCES, CONTACT, and a LOGIN button with a notification badge. Below the navigation bar is a large banner with the text "Site Security Notification" and "Use the buttons below to continue your login." Below the banner are three buttons: "Background Checks | Version 2.0", "Background Checks | Legacy", and "Lender Solutions | Login". A teal arrow with a "2" in a circle points to the "Background Checks | Version 2.0" button. To the right of the buttons is a "Site Security Notification" section with a notice about the company's security measures and contact information for the Security and Monitoring team.

HOME SERVICES COMPANY RESOURCES CONTACT LOGIN

## Site Security Notification

Use the buttons below to continue your login.

[Background Checks | Version 2.0](#)

[Background Checks | Legacy](#)

[Lender Solutions | Login](#)

For any questions contact us at (925) 927-3333.

For SITE SECURITY purposes and to ensure that this service remains available to all users, this computer system employs software programs to monitor network traffic to identify unauthorized attempts to upload or change information, or otherwise cause damage. Unauthorized attempts to upload information or change information on this service are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986 and the National Information Infrastructure Protection Act.

NOTICE: We will not obtain personally-identifying information about you when you visit our site unless you choose to provide such information to us.

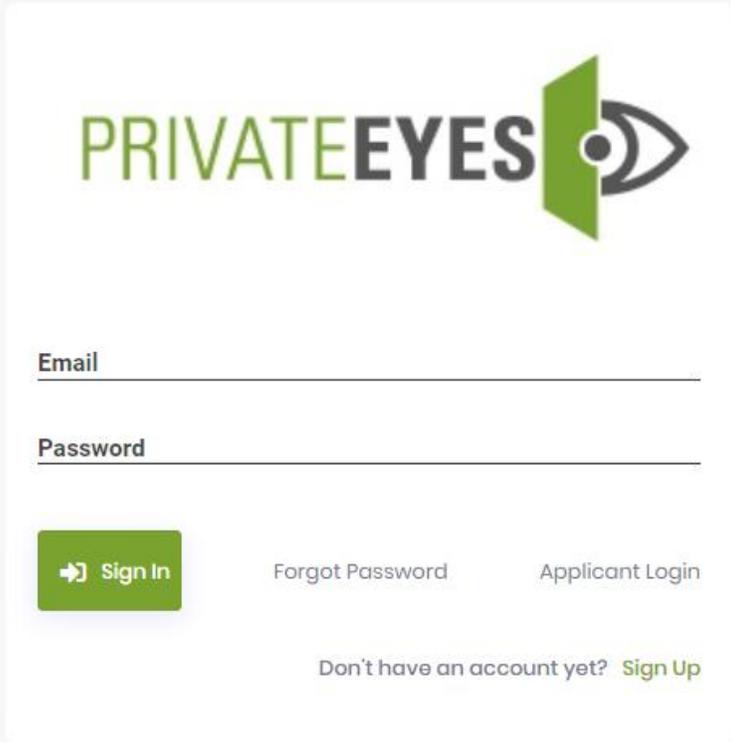
Point of Contact for Security and Monitoring: Frank Santa Elena email: [security@pebackgroundchecks.com](mailto:security@pebackgroundchecks.com) Information Systems Security Officer (ISSO) for [www.privateeyesbackgroundchecks.com](http://www.privateeyesbackgroundchecks.com) phone (925) 927-3333.

# Logging In

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Once you are on the portal login page:

1. Input your login credentials.
2. Select “Sign In.”



The screenshot shows the login interface for 'PRIVATE EYES'. At the top is the logo, which consists of the text 'PRIVATE EYES' in a sans-serif font, followed by a stylized eye icon where the iris is a green vertical bar. Below the logo are two input fields: 'Email' and 'Password', each with a horizontal line underneath. To the left of the 'Sign In' button is a green square button with a white right-pointing arrow and the text 'Sign In'. To the right of this button are two links: 'Forgot Password' and 'Applicant Login'. At the bottom center, there is a link that says 'Don't have an account yet? Sign Up'.

# Dashboard Introduction

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Navigation Bar

Report Summary

Support

Announcements

The dashboard features a dark navigation bar on the left with the PRIVATE EYES logo and a list of menu items: Dashboards, ORDER (Background Checks, Batch Import, ATS Queue), SEARCH (View Order, Search Background Checks), INVOICE (Invoice), ADMIN (Admin), and REPORTS (Report, Reports). The main content area is titled 'Background Checks Summary' and includes a timespan filter (Daily, Weekly, Monthly, Yearly) and eight progress bars for different statuses: Processing (0), Completed (1), Drug Screen Negative (0), Drug Screen Non Negative (0), Dispute (0), In Complete (0), Pro Adverse (0), and Post Adverse (0). Below this is a 'Background Checks Order Summary' table.

	Now	48 hr	48 - 72 Hrs	72+ Hrs
Processing	0	0	0	0
Completed	1	0	0	0
Cancelled	0	0	0	0
Awaiting Applicant Response	0	0	0	0
Received Applicant Response	0	0	0	0
Rejected by Applicant	0	0	0	0

Timespan filter

(for report & order summary)

Order Summary

# Dashboard

## Navigation Bar

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### Order: Send and build requests.<sup>①</sup>

Background Checks: Send applicants links and order individual background checks.<sup>②</sup>

Batch Import: Send multiple invitations to applicants or report orders at once.<sup>③</sup>

### Search: Search requested reports.<sup>④</sup>

View Order: View entire order and send applicant resend links.<sup>⑤</sup>

Search Background Checks: Search for services.<sup>⑥</sup>

### Invoice: View invoices.<sup>⑦</sup>

The screenshot displays the PRIVATEEYES dashboard interface. On the left is a dark navigation bar with the following menu items: Dashboards, ORDER ① (with sub-items: Background Checks ②, Batch Import ③, ATS Queue), SEARCH ④ (with sub-items: View Order ⑤, Search Background Checks ⑥), INVOICE (with sub-item: Invoice ⑦), ADMIN (with sub-item: Admin >), and REPORTS (with sub-items: Report >, Reports). The main content area is titled 'Background Checks Summary' and features four progress bars: Processing (0), Completed (full bar), Dispute (0), and In Complete (full bar). Each bar has a 'View' button. Below this is a 'Background Checks Order Summary' table with columns for status, duration, and time range.

Processing	Completed	Dispute	In Complete
0	Full bar	0	Full bar
View	View	View	View

Background Checks Order Summary			
	New	48 hr	48 - 72 Hrs

# Dashboard

## Background Checks Summary

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Review specific reports by selecting “View” under the respective category.

**Processing:** Reports that are processing. ①

**Completed:** Completed reports. ②

**Drug Screen Negative:** Drug screens with Negative results. ③

**Drug Screen Non-Negative:** Drug screens with Positive results. ④

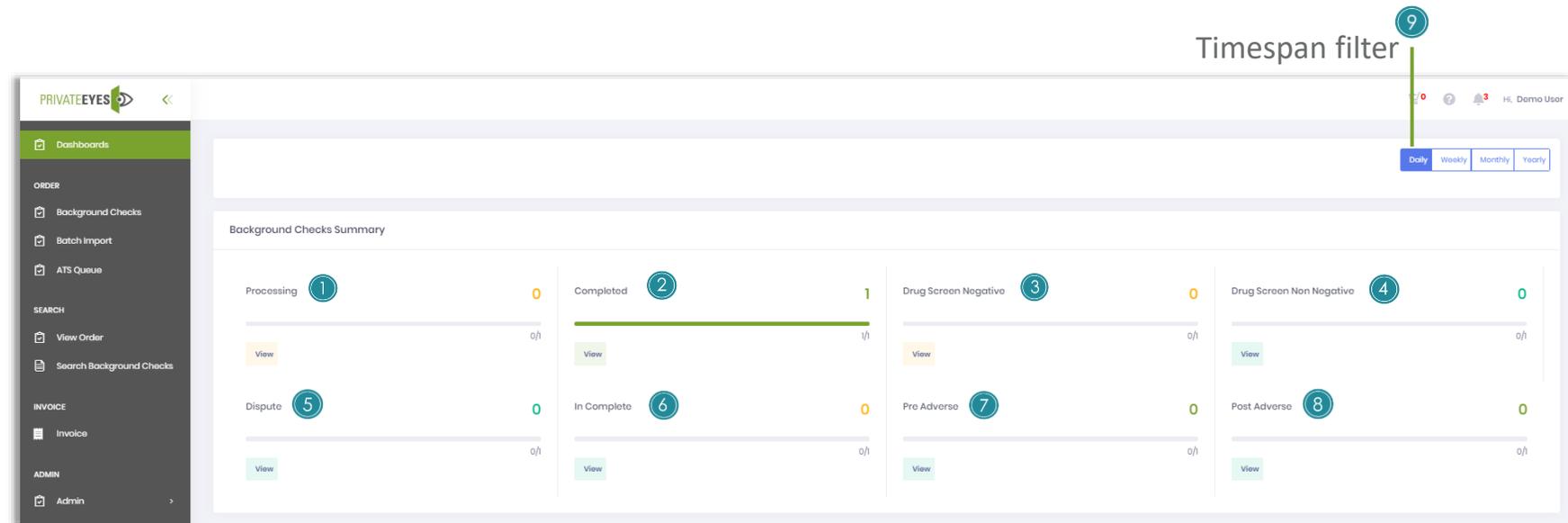
**Dispute:** View ongoing disputed reports. ⑤

**Incomplete:** View incomplete reports. ⑥

**Pre-Adverse:** Reports recommended for adverse. ⑦

**Post-Adverse:** Reports ready for post adverse. ⑧

You may view Background Check Summaries “Daily,” “Weekly,” “Monthly,” and/or “Yearly” by using the timespan filter. ⑨



# Dashboard

## Contacting Support

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Select “?” icon.

1. Select “Create” on the right hand side.

2. Fill all required fields.

- Request Type <sup>1</sup>
- Screen <sup>2</sup>
- Request Priority <sup>3</sup>
- Request Subject <sup>4</sup>
- Remarks <sup>5</sup>

Note: Upload any files that will be helpful for our support team to help you with your request.

3. “Save.” <sup>6</sup>

PRIVATEEYES >> <<

Support

Hi, Demo User

← Back Reset Save <sup>6</sup>

Create Support Request

Request Type\* <sup>1</sup> --Select--

Screen\* <sup>2</sup> --Select--

Request Priority\* <sup>3</sup> --Select--

Request Subject\* <sup>4</sup>

Remarks\* <sup>5</sup>

Upload File Choose File No file chosen

# Dashboard

## Sending an Adverse Action Letter

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Select “View” under “Pre Adverse” on the dashboard.

1. Select “Search” and filter by dates you would like view adverse actions on.
2. Select “Post Adverse Letter.”
3. Select either “Postal” or “Email” to send Adverse Action letter.
4. Click “Save.” and letter will be sent.

Note: After 5 days, automatically the post adverse action will appear and you will be available to send a follow-up. This was created to prevent from sending pre and post adverse action letters at the same time.

The screenshot displays the PRIVATE EYES dashboard interface. On the left is a dark sidebar with navigation options: Dashboards, ORDER (Transcript, Background Checks, Batch Import, ATS Queue), SEARCH (View Order, Search Request, Search Background Checks), INVOICE (Invoice), and ADMIN (Admin). The main content area features a search bar at the top, a 'Results' section, and a table of search results. A toolbar above the table includes actions like View, Download Final Report, Add Document, Audit Trail, Post Adverse Letter, and Resend Pre-Adverse Letter. A circled '1' highlights the 'Post Adverse Letter' button. The table shows one record with the following details:

Order Id	Order Service Id	Service Name	Reference No.
228471	79145	County Criminal Search	202061619644
<b>Applicant</b>	<b>SSN</b>	<b>Date Of Birth</b>	<b>Status</b>
Buggie Bunny	XXX-XX-2222	01/01/1970	Completed
<b>Country Name</b>	<b>State Name</b>	<b>County Name</b>	<b>Completed Date Time</b>
USA	NV	Washoe	06/23/2020
<b>Received Date Time</b>	06/16/2020		

# Ordering a Report

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Under the “Order” navigation bar select “Background Checks.”

1. Under “Package Name” select the package you would use to screen your applicant.
2. Under “Service Name” select additional a la carte item(s) that you would like to add to the services provided in your package
  - You may also select a la carte items without selecting a package.

Send an invitation\*

or

Build a Report

The screenshot shows a web application interface for ordering reports. On the left is a dark sidebar menu with categories: DASHBOARDS, ORDER, SEARCH, INVOICE, ADMIN, and REPORTS. The 'ORDER' section is expanded, showing 'Background Checks' (highlighted), 'Batch Import', and 'ATS Queue'. The 'REPORTS' section shows 'Report' and 'Reports'. The main content area has a top right with 'Reset Selection' and 'Submit' buttons. Below is a table with two columns: 'Package Name' and 'Service Name'. The 'Package Name' table has one row: 'Test package' with a selected radio button. The 'Service Name' table has 16 rows, each with a checkbox and a service name.

Package Name	Service Name
<input checked="" type="radio"/> Test package	<input checked="" type="checkbox"/> 10 Panel Drug Screen
	<input type="checkbox"/> 10 Panel Drug Screen w/ UALC
	<input type="checkbox"/> 10 Panel DS w/ Nicotine (1224)
	<input type="checkbox"/> 10 Panel DS W/O Marijuana
	<input type="checkbox"/> 10 Panel W/ Methaqualone (1210)
	<input type="checkbox"/> 11 Panel (MDMA/Ecstasy)
	<input type="checkbox"/> 11 Panel Drug Screen
	<input type="checkbox"/> 12 Panel Drug Screen
	<input type="checkbox"/> 14 Panel Drug Screen
	<input type="checkbox"/> 4 Panel Drug Screen
	<input type="checkbox"/> 5 Panel DOT
	<input type="checkbox"/> 5 Panel Drug Screen
	<input type="checkbox"/> 5 Panel Expanded Opiates (3246)
	<input type="checkbox"/> 7 Panel Drug Screen
	<input type="checkbox"/> 8 Panel Drug Screen
	<input type="checkbox"/> 9 Panel Drug Screen
	<input type="checkbox"/> 9 Panel DS + Meperidine & Oxycodone (1324)
	<input type="checkbox"/> 9 Panel DSP/OXY/BU/PHN (2303)

\* Private Eyes best practice recommendation. This provides a secure link with all the necessary compliancy forms for applicants to complete their background check online.

# Ordering a Report: Sending Applicant an Invitation

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1. Under “Applicant Detail” fill out the applicant’s:

- First name <sup>1</sup>
- Last name <sup>2</sup>
- Email Address <sup>3</sup>

Optional: Middle Name, Reference no. , and sending applicant a copy of their background check

2. Select “Send Invitation.” <sup>4</sup>

Applicant Detail

Back Reset

First Name\* <sup>1</sup> Middle Name Last Name\* <sup>2</sup>

Reference No. Email Address\* <sup>3</sup>

Send Applicant copy of their background check

To send link to Candidate please complete the required fields above, then click send invitation.

<sup>4</sup> Send Invitation

SSN Number\* Date Of Birth\* Gender

Position Country Name\* Street Address\*

United States

Zip Code\* City Name\* State Name\*

Alias First Name Alias Last Name Special Instruction

I will let the system select the locations from the zip code above

I will select the locations manually

# Ordering a Report: Building a Report

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To build a report, fill out:

1. All of the mandatory fields under “Applicant Detail.”

- SSN Number <sup>5</sup>
- Date of Birth <sup>6</sup>
- Country Name <sup>7</sup>
- Street Address <sup>8</sup>
- Zip Code <sup>9</sup>
- City Name <sup>10</sup>
- State Name <sup>11</sup>

2. Select “Submit.”\* <sup>12</sup>

Applicant Detail

Back Reset

I would like a copy of my background check.

To send link to Candidate please complete the required fields above, then click send invitation.

Send Invitation

SSN Number\* <sup>5</sup>

Date Of Birth\* <sup>6</sup>

Gender

--Select--

Position

Country Name\* <sup>7</sup>

United States

Street Address\* <sup>8</sup>

Zip Code\* <sup>9</sup>

City Name\* <sup>10</sup>

State Name\* <sup>11</sup>

--Select--

Alias First Name

Alias Last Name

Special Instruction

I will let the system select the locations from the zip code above

I will select the locations manually

Autopopulate from address history

<sup>12</sup> Submit

\* Please note to not select “Send Invitation” if you do not wish for your applicant to not fill out their background application online.

# Ordering a Report: Batch Imports

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Under the “Order” navigation bar select “Batch Import.”

1. Select “Create” on the right hand side.
2. Select “Click to download predefined template”<sup>1</sup> and fill all required fields.
  - Order Batch Import<sup>2</sup>
  - Select Order Package/Service<sup>3</sup>
  - Upload Batch order template<sup>4</sup>
3. “Save.”<sup>5</sup>

Note: Select “Send Invitation” if you wish for your applicant to fill out their background application online.

The screenshot shows the 'Create Batch Import' form. The left sidebar contains navigation options: Dashboards, ORDER (Background Checks, Batch Import, ATS Queue), SEARCH (View Order, Search Background Checks), INVOICE (Invoice), ADMIN (Admin), and REPORTS (Report, Reports). The main form area has the title 'Create Batch Import' and a 'Click to download predefined template' link (1). Below the title are three main sections: 'Order Batch Name' (2) with a text input field, 'Select Order Package/Service' (3) with a dropdown menu, and 'Send Invitation' (checkbox). Below these are 'I would like a copy of my background check' (checkbox) and 'Order Batch Remarks' (text area). To the right of the 'Order Batch Remarks' field is the 'Upload Order Batch Items' (4) section with a 'Choose File' button and 'No file chosen' text. At the top right of the form are 'Back', 'Reset', and 'Save' (5) buttons.

# Searching a Report: View Orders

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Under the “Search” navigation bar select “View order.” This enables user access to view details of reports with the following options:

 **View:** View all services associated with the background check. ①

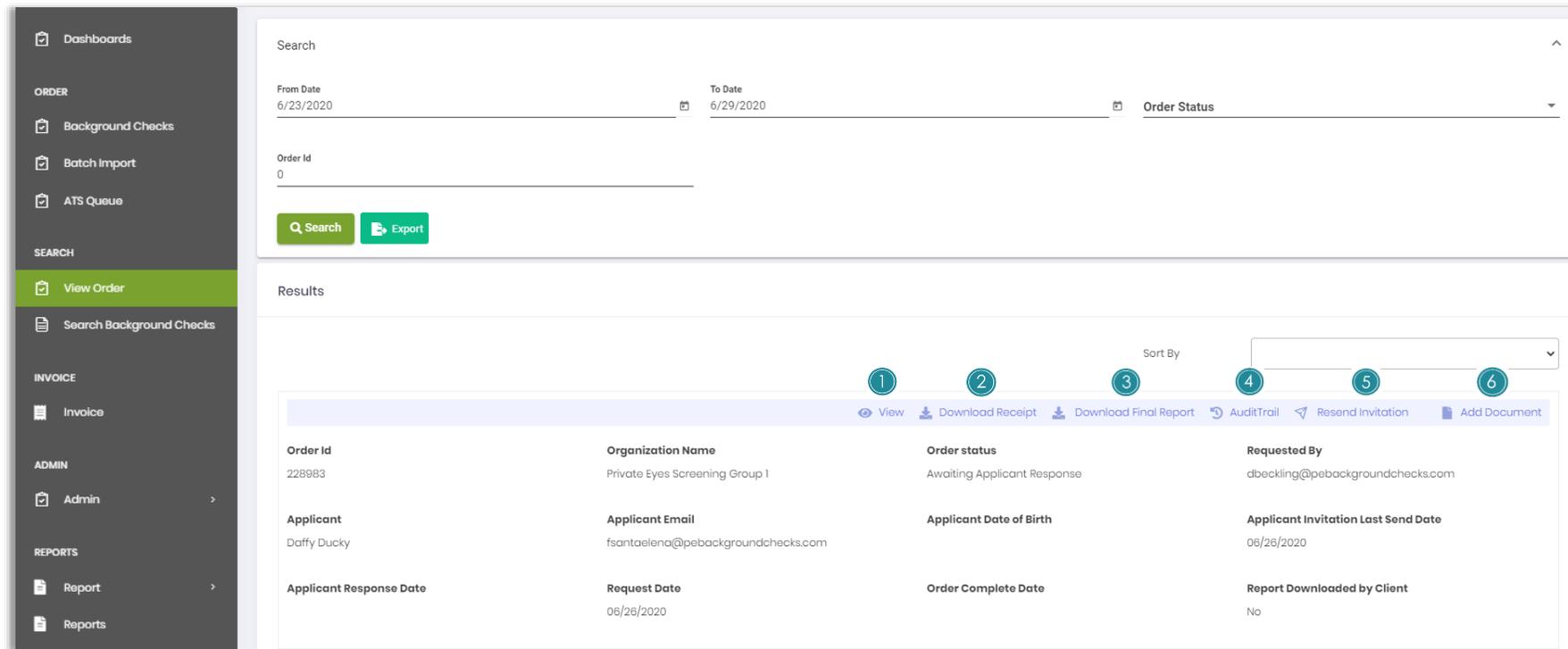
 **Download Receipt:** View the cost of the report. ②

 **Download Final Report:** View completed report. ③

 **Audit Trail:** View the audit trail. ④

 **Resend Invitation:** Resend applicant their invitation. ⑤

 **Add Document:** Upload important documents pertaining to applicant. ⑥



The screenshot displays the application's search interface. On the left is a dark sidebar with navigation options: Dashboards, ORDER (Background Checks, Batch Import, ATS Queue), SEARCH (View Order, Search Background Checks), INVOICE (Invoice), ADMIN (Admin), and REPORTS (Report, Reports). The 'View Order' option is highlighted in green. The main content area has a search bar with 'From Date' (6/23/2020) and 'To Date' (6/29/2020) filters, and an 'Order Status' dropdown. Below the search bar are 'Search' and 'Export' buttons. The 'Results' section shows a table with columns for Order Id, Organization Name, Order status, Requested By, Applicant, Applicant Email, Applicant Date of Birth, Applicant Invitation Last Send Date, Applicant Response Date, Request Date, Order Complete Date, and Report Downloaded by Client. A toolbar above the table includes icons for View, Download Receipt, Download Final Report, Audit Trail, Resend Invitation, and Add Document, with numbered callouts 1 through 6 pointing to each icon. The table contains one row of data for Order Id 228983.

Order Id	Organization Name	Order status	Requested By
228983	Private Eyes Screening Group 1	Awaiting Applicant Response	dbeckling@pebackgroundchecks.com

Applicant	Applicant Email	Applicant Date of Birth	Applicant Invitation Last Send Date
Daffy Ducky	fsantaelena@pebackgroundchecks.com		06/26/2020

Applicant Response Date	Request Date	Order Complete Date	Report Downloaded by Client
	06/26/2020		No

# Searching a Report: Background Checks

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Under the “Search” navigation bar select “Search Background Checks.” This enables user access to search for a report by filtering:

- Date Range ①
- Applicant’s Name ②
- Reference No. ③
- Applicant’s SSN ④
- Order ID ⑤
- Service ⑥
- Order Service Status ⑦

The screenshot shows the PRIVATE EYES application interface. On the left is a dark sidebar with navigation options: Dashboards, ORDER (Background Checks, Batch Import, ATS Queue), SEARCH (View Order, Search Background Checks), INVOICE (Invoice), ADMIN (Admin), and REPORTS (Report, Reports). The 'Search Background Checks' option is highlighted in green. The main content area has a search bar with the following fields: From Date (6/23/2020), To Date (6/29/2020), First Name, Last Name, Reference No., SSN, Order Id (0), Service (All), and Order Service Status. There are 'Search' and 'Export' buttons below the search fields. Below the search bar is a 'Results' section with a 'Sort By' dropdown menu. A table displays the search results for a report:

Order Id	Applicant	Country Name	Received Date Time	Order Service Id	SSN	State Name	Service Name	Date Of Birth	Reference No.	Status	Completed Date Time
228852	Sofia KAhn	United States	06/26/2020	79543	545910071	Kansas	Motor Vehicle Report	03/22/1966	202062613423	In-Review	

At the top of the table, there are buttons for 'Download Final Report', 'Add Document', and 'Audit Trail'. The table also includes a 'Daffy Ducky' label next to the Order Id field.

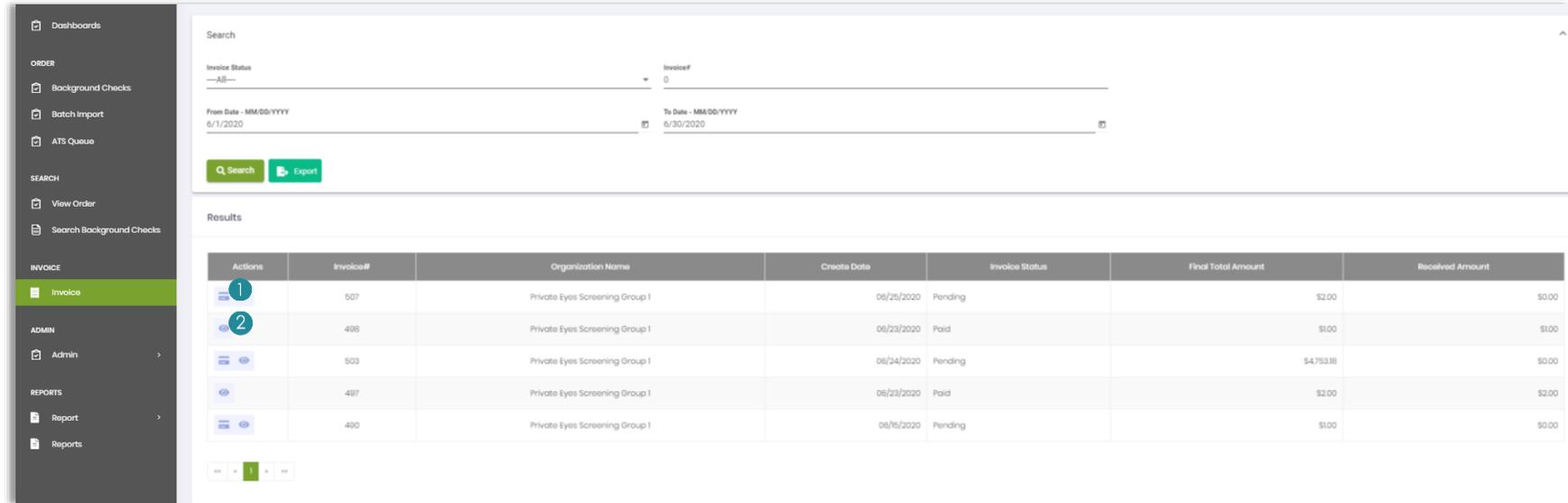
# Invoice Lookup

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Under the navigation bar select “Invoice.” This enables user access to view invoices. You will be able to filter by invoice number and date range.

 **Paynow:** Pay for all pending payments through credit card. ①

 **View Order:** View the invoice details. ②



The screenshot displays the Invoice Lookup interface. On the left is a dark navigation sidebar with the following menu items: Dashboards, ORDER (Background Checks, Batch Import, ATS Queue), SEARCH (View Order, Search Background Checks), INVOICE (Invoice), ADMIN (Admin), and REPORTS (Report, Reports). The 'INVOICE' section is highlighted in green. The main content area features a search bar with fields for 'Invoice Status' (set to 'All'), 'Invoice#', 'From Date - MM/DD/YYYY' (set to '6/1/2020'), and 'To Date - MM/DD/YYYY' (set to '6/30/2020'). Below the search bar are 'Search' and 'Export' buttons. The 'Results' section contains a table with the following data:

Actions	Invoice#	Organization Name	Create Date	Invoice Status	Final Total Amount	Received Amount
 ①	507	Private Eyes Screening Group 1	06/25/2020	Pending	\$2.00	\$0.00
 ②	498	Private Eyes Screening Group 1	06/23/2020	Paid	\$1.00	\$1.00
	503	Private Eyes Screening Group 1	06/24/2020	Pending	\$4,753.88	\$0.00
	497	Private Eyes Screening Group 1	06/23/2020	Paid	\$2.00	\$2.00
	490	Private Eyes Screening Group 1	06/15/2020	Pending	\$1.00	\$0.00

At the bottom of the table, there is a pagination control showing '1' of 1 results.

# Contact Us

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[Client Service Specialists](#) | [css@pebackgroundchecks.com](mailto:css@pebackgroundchecks.com)

Hours of Operation: Monday-Friday, 5AM-5PM PST

Phone Number: (925) 927-3333