



**First Advantage**

A Symphony Technology Group Company

# Contractor Advantage

## User Guide for Vendors

June 2013

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## Table of Contents

Introduction .....	4
Registering a New Vendor Account .....	4
Logging In.....	6
Adding People .....	7
Submitting Orders.....	8
Submitting a Badge Photo .....	10
Searching for a Person .....	11
Terminating or Deactivating an Employee.....	13
Basic Administration Functions .....	15
Adding a new location.....	15
Adding a new user.....	15
Changing email notification preferences and updating passwords.....	16

## Introduction

This guide provides you with key information for using the First Advantage Contractor Advantage system for the most-frequently-used vendor features: Ordering background reports and managing users.

If you need assistance, please contact the First Advantage customer support team by telephone or email:

**1-866-237-2135**

[employment.support@fadv.com](mailto:employment.support@fadv.com)

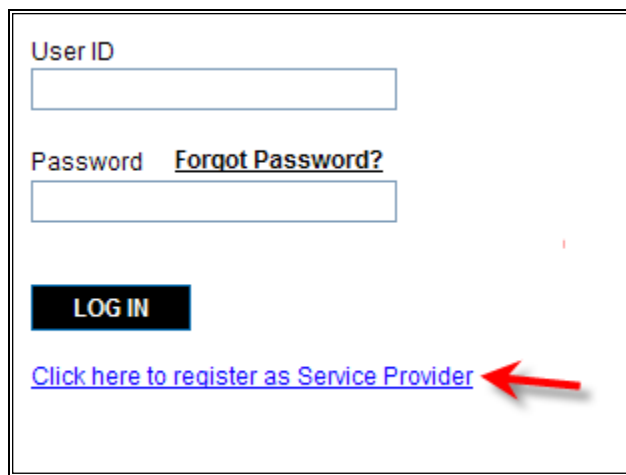
## Registering a New Vendor Account

To access the Contractor Advantage system, enter the URL provided by First Advantage in your browser's address window. Please note that the URL is case-sensitive; that is, you must enter lower case and capital letters exactly as shown in your notification. For future use, please bookmark or add the URL to Favorites.

Before you begin using the system, you must register your account.

Use the following procedure to register as a service provider.

1. Click on the link on the login page fields to **register as Service Provider**.



The screenshot shows a login form with the following elements:

- A text input field labeled "User ID".
- A text input field labeled "Password" with a link "[Forgot Password?](#)" to its right.
- A black button labeled "LOG IN".
- A blue hyperlink labeled "[Click here to register as Service Provider](#)" with a red arrow pointing to it from the right.

2. Create a **User ID** and **Password** and complete the other sections of the registration form.

**Note:** Required fields are indicated by an asterisk (\*).

3. Enter your **Business Information**. In the top section of the form.

The screenshot shows a registration form with three main sections: Business Information, Business Questionnaire, and Primary Contact Information. The Business Information section includes fields for Business Name, Ownership Type (a dropdown menu), Ownership Info, SSN, Country (pre-filled with United States Of America), Address 1, Address 2, City, State (a dropdown menu), and Zip. The Business Questionnaire section has a dropdown menu for 'What ABC Company Business Unit is your relationship with?' and a text field for 'What is the name of your contact person?'. The Primary Contact Information section includes fields for Last Name, First Name, Middle Name, Suffix (Jr., II, etc.), Title, Phone Number (with an example e.g., 5555551234), Phone Number Ext, and E-mail. A note at the bottom states: '\*\* If you do not have an e-mail address, you need to setup an account. Free e-mail is available from: [Hotmail](#) or [Yahoo](#)'. A 'SUBMIT REGISTRATION' button is located at the bottom center of the form.

4. In the **Business Questionnaire** section, the sponsoring company for whom you are providing services is shown in place of “ABC Company.” Select the appropriate business unit or department to indicate which area of sponsoring company established the vendor relationship, and enter the name of your primary contact at the sponsoring company.
5. In the **Primary Contact Information** section, enter the information for the person at your firm who will be the primary contact for screening activities. Note that a valid email address is required for the primary contact.
6. Click **SUBMIT REGISTRATION**.
7. Review the registration information to verify its accuracy. If you need to correct anything, click **GO BACK**. If all information is correct, click **CONFIRM**.

Once you have confirmed your registration information, the system shows a message that you have registered successfully, which includes a transaction number for reference. The system also sends you an email confirmation.

**Your account will be activated within 1 to 2 business days.**

## Logging In

To access the Contractor Advantage site after initial registration, use the same URL as you did to register.

1. Enter the user ID and password you created during registration and click LOG IN.
2. On your first visit only, you must accept the legal agreement before proceeding to the site. Read the agreement carefully. If you accept the terms, click ACCEPT LEGAL AGREEMENT.
3. Each time you log in, you must certify that you have complied with requirements for ordering screening reports by accepting the Fair Credit Reporting Act (FCRA) agreement. To certify that you comply with the FCRA, click **ACCEPT FCRA AGREEMENT**.

Contractor Advantage

Technical Support at 1-866-237-2135

NOTICE

The accuracy of the data submitted by the requestor will impact the accuracy of the results obtained. While the information furnished is from reliable sources, its accuracy is not guaranteed. Use of available data is subject to the Federal Credit Reporting Act (FCRA) and other applicable law. For any information used for employment purposes, THE REQUESTOR CERTIFIES THE FOLLOWING:

Clear and conspicuous written disclosure will be made to the consumer, prior to obtaining the report, in a document that consists solely of the disclosure, that a consumer report may be obtained. Requestor will obtain written authorization from the consumer which will be made available to LexisNexis upon request. The information obtained will not be used in violation of any federal or state equal opportunity law or regulation. If requestor intends to take any adverse action based in whole or in part on the consumer report, a copy of the report and a summary of the consumer's rights will be provided to the consumer prior to taking adverse action.

Section 619 - 1681q. Obtaining Information Under False Pretenses. Any person who knowingly and willfully obtains information on a consumer from a consumer reporting agency under false pretenses shall be fined under Title 18, United States Code, imprisoned for not more than 2 years, or both.

**ACCEPT FCRA AGREEMENT**      **DECLINE FCRA AGREEMENT**

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The Contractor Advantage home page displays after you have accepted the agreement(s). From the home page, you may perform these tasks:

- Add a person/employee
- Submit an order
- Search for a person/employee and view compliance
- Edit Employee Status

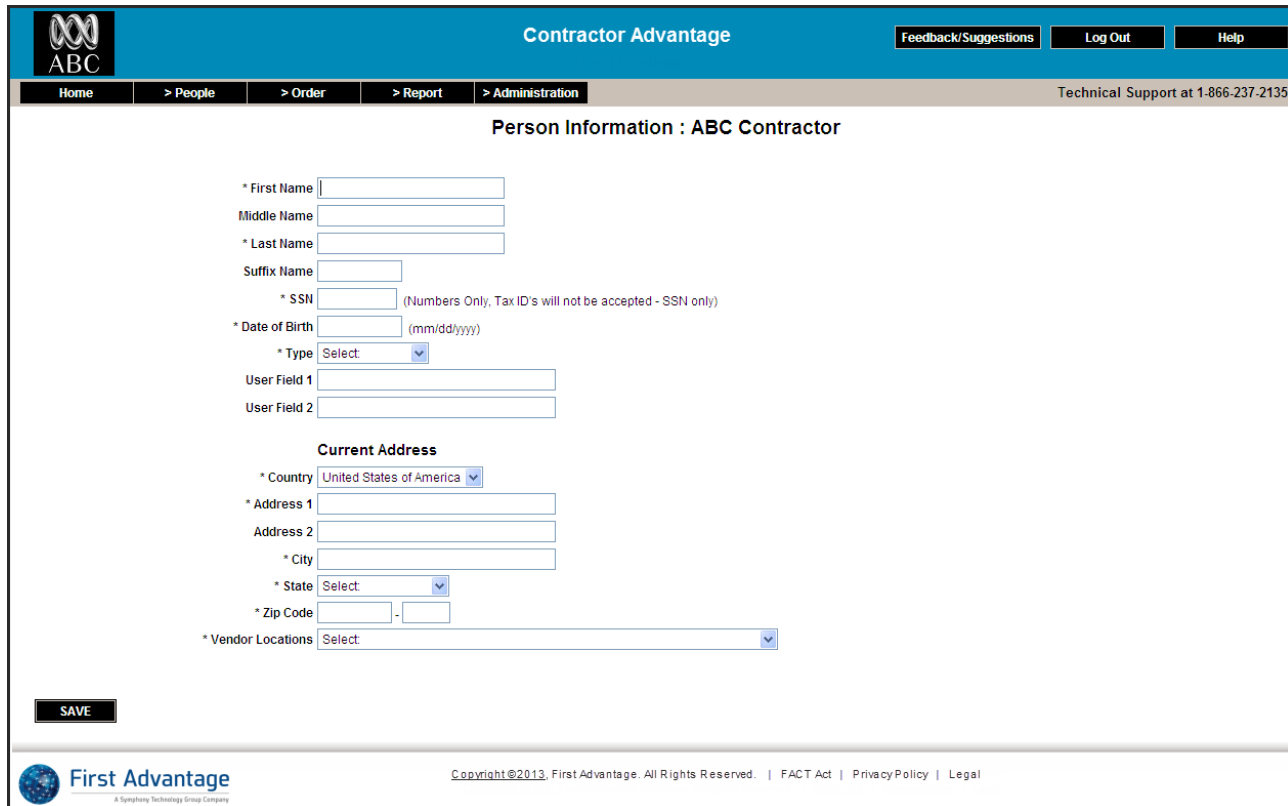
## Adding People

To order a background screening on an individual, you must **add** that person to the system.

1. Click the **People** tab and select **Add New Person**.



2. Enter information for the new person on the **Person Information** screen, being sure to complete all required fields (noted with an asterisk \*).

A screenshot of the 'Person Information' form for 'ABC Contractor'. The form is titled 'Person Information : ABC Contractor' and is located within a blue header bar for 'Contractor Advantage'. The form contains several input fields and dropdown menus, all marked with an asterisk (\*) to indicate they are required. The fields include: First Name, Middle Name, Last Name, Suffix Name, SSN (with a note: '(Numbers Only, Tax ID's will not be accepted - SSN only)'), Date of Birth (with a note: '(mm/dd/yyyy)'), Type (dropdown), User Field 1, User Field 2, Current Address (Country dropdown set to 'United States of America'), Address 1, Address 2, City, State (dropdown), Zip Code, and Vendor Locations (dropdown). A 'SAVE' button is located at the bottom left of the form. The footer of the page includes the 'First Advantage' logo and copyright information: 'Copyright ©2013, First Advantage. All Rights Reserved. | FACT Act | Privacy Policy | Legal'.

3. Make sure all information is correct and click **SAVE**. The person is immediately added to the roster.

## Submitting Orders

**Note:** Be sure to obtain a signed consent form before submitting an order.

1. On the Person Status Detail page, select **BEGIN ORDER PROCESS**.

The screenshot shows the 'Person Status Detail' page for 'ABC Contractor - (259214)'. The page is divided into two columns of information. The left column contains personal details: First Name: test, Middle Name: (blank), Last Name: test, Suffix Name: (blank), SSN: XXXXX9090, Date of Birth: 01/01/XXXX, Type: Sub-Contractor, Status: Active, Address 1: test, Address 2: (blank), City: test, State: OK, Zip Code: 12121. The right column contains user and badge information: User Field 1: (blank), User Field 2: (blank), Badge Expires: (blank), Badge Number: (blank), Location Number: Corporate, Person ID: 55, Current Picture: (blank), Picture Load Date: (blank), Picture Status: (blank), Self Reported Convictions: (blank). Below the information are four buttons: 'EDIT INFORMATION', 'BEGIN ORDER PROCESS', 'PRINT CONSENT FORM', and 'SUBMIT BADGE PHOTO'. A red arrow points to the 'BEGIN ORDER PROCESS' button. At the bottom left is an 'OK' button. The footer includes the First Advantage logo and copyright information.

The system then displays the **Background Check Order Detail** page.

2. Select the desired screening package. Review the package details. If you do not already have a signed consent form, click on the hyperlink, print the form, and obtain the signature. Click the consent confirmation checkbox, and click **Next**.

The screenshot shows the 'Background Check Order Detail' page. At the top, it says 'Select a package to view the package details and begin the ordering process:'. There are two radio button options: 'Basic Contractor Package' (selected) and 'Technical Contractor Package'. Below this, the details for the 'Basic Contractor Package' are shown: 'SSN Verification, National Criminal Record File, Motor Vehicle Report, Global Sanctions Search'. A note says 'Please print out the [consent form](#) and have the above individual sign it before continuing to the next step.' Below the note is a checkbox labeled 'I have a signed consent form for this individual on file.' which is checked. At the bottom are two buttons: 'Next' and 'Cancel'. Red arrows point to the 'Next' button and the checkbox.

3. If prompted, enter any requested additional information.
4. If your package includes drug testing, the screen to **LOCATE A COLLECTION SITE** for the drug test displays. If your package does not include drug testing, continue to the next step.



**LOCATE A COLLECTION SITE:**

A collection site will be located close to the following address:

\* Address   
\* City   
\* State   
\* Zip Code

**Search**

**COLLECTION SITES NEAR YOU:**

Please select a collection site from the list below:

Site Name	Site Address	Hours of Operation	Distance	Price
<input checked="" type="radio"/> LabCorp - Park Rd	10512 Park Rd Suite 107	Mon,Tue,Wed,Thu,Fri 08:00 AM-12:30PM	1.16 miles	\$21.75
<input type="radio"/> LabCorp - Charlotte	15830 John J Delaney Dr Suite 140	M-F 8am-12pm, 1:30pm-4pm	2.68 miles	\$21.75
<input type="radio"/> LabCorp - Rock Hill	2460 India Hook Rd Suite 101	M-F 10am-12:30pm, 2pm-4:30pm	11.05 miles	\$21.75
<input type="radio"/> LabCorp - WT Harris	5031G W Wt Harris Blvd	Mon,Tue,Wed,Thu,Fri 08:00 AM-3:00PM	17.68 miles	\$21.75
<input type="radio"/> LabCorp - Gastonia	640 Summit Crossing Pl Suite 206	M-F 8am-12:30pm, 1:30pm-4:30pm	19.58 miles	\$21.75

**NEXT**

**Note:** The collection locations shown are the LabCorp sites closest to the address submitted under the Person Information Profile. If no sites are listed, a message displays on the order confirmation screen, informing the individual to contact the First Advantage National Scheduling Center to schedule an appointment.

Click **NEXT**. The payment screen displays.

5. Complete the payment information and click **ORDER**.

**Please enter your method of payment below:**

Service Name Basic Contractor Package  
Order Total:

\* Payment Method

**Note:** If you did not (yet) pass LexisNexis credentialing, you will not be able to see the detailed results.

**Order** **Cancel**

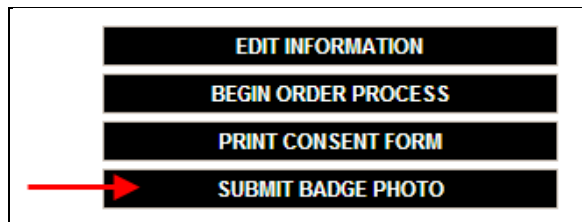
If you ordered a package with a badge, please proceed to the next section for instructions on submitting the badge photo.

## Submitting a Badge Photo

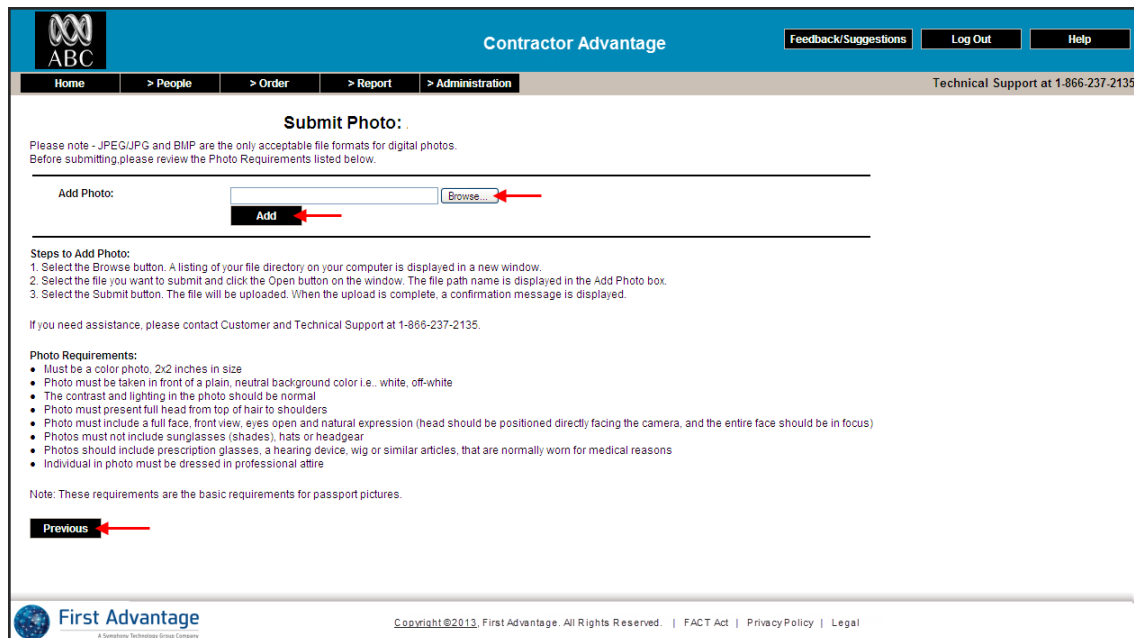
If you are not already on the **Person Status Detail** page, go to **People > Search People**, and enter the person's name and click **SEARCH**. Select the person from the results list to display the **Person Status Detail** page.

Before you begin, ensure the photo to be used for the badge is stored on the computer as a .jpg file.

1. Select **SUBMIT BADGE PHOTO**.



2. Review the Badge Photo Requirements to confirm that your photo is acceptable. If the photo does not meet requirements, the issuance of the badge will be delayed. **Note:** These are the basic requirements for passport pictures.
3. Click **BROWSE** to locate the file to upload.

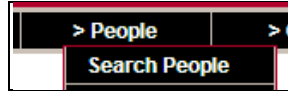


4. Highlight the photo file, click **ADD**, then click **PREVIOUS** to go back to and complete the remainder of the background order.

**Note:** Once the background check is completed with a Compliant status AND a valid photo has been uploaded, a badge will be issued.

## Searching for a Person

You may use the People Search to view compliance status of the background screening and to perform other tasks related to individuals on your roster. You may also export the search results to an Excel spreadsheet file.



1. Select **Search People** from the **People** tab.
2. Search by entering one or more of the desired search criteria – typically an individual’s SSN or name. You may enter partial search data. Click **SEARCH**. If you don’t enter any search criteria, the system displays a complete roster of all individuals active for your account.

A screenshot of a search criteria form. At the top, it displays 'Vendor Name: ABC Contractor'. Below this are several input fields and dropdown menus: 'First Name:' (text box), 'Last Name:' (text box), 'Compliance Status:' (dropdown menu with 'Select' option), 'Compliance Expires:' (dropdown menu with 'Select' option), 'SSN:' (text box), 'Person Status:' (dropdown menu with 'Select' option), 'Type:' (dropdown menu with 'Select' option), 'Vendor Locations:' (dropdown menu with 'ALL:' option), 'User Field 1:' (text box), 'User Field 2:' (text box), 'Self Reported Convictions:' (dropdown menu with 'Select' option), and 'Search By Date:' (dropdown menu with 'Select' option). A black button with the word 'SEARCH' in white is located at the bottom left of the form area.

3. View the list at the bottom of the page to determine whether the individual's background report has a status of **Compliant**.

Name ↕	Compliance Status ↕	Compliance Expires ↕	SSN ↕	Person Status ↕	Order Date ↕	Completion Date ↕	User Field 1 ↕	Type ↕	Location ↕
<a href="#">John Doe</a>	Non-Compliant	07/20/2011	XXXXXXXX	Active	07/20/2009	07/23/2009		Sub Contractor	XXXXXXXX
<a href="#">John Doe</a>	Compliant	02/05/2012	XXXXXXXX	Active	02/05/2010	02/05/2010		Sub Contractor	XXXXXXXX
<a href="#">John Doe</a>	Compliant	07/07/2011	XXXXXXXX	Active	07/07/2009	07/10/2009		Sub Contractor	XXXXXXXX
<a href="#">John Doe</a>	Compliant	12/08/2010	XXXXXXXX	Active	12/08/2008	12/10/2008		Sub Contractor	XXXXXXXX
<a href="#">John Doe</a>	Compliant	01/22/2011	XXXXXXXX	Active	01/22/2009	01/28/2009		Sub Contractor	XXXXXXXX
<a href="#">John Doe</a>	Compliant	04/20/2011	XXXXXXXX	Active	04/20/2009	04/22/2009		Sub Contractor	XXXXXXXX
<a href="#">John Doe</a>	Compliant	01/09/2011	XXXXXXXX	Active	01/09/2009	01/11/2009		Sub Contractor	XXXXXXXX

You can sort the results by clicking the arrows next to each heading. Note that SSNs are masked to comply with privacy requirements.

If the person is not in the list, you may need to add the person to the system and submit an order.

4. To export the results list to a spreadsheet file, click on the **Excel** icon at the bottom of the page.



## Terminating or Deactivating an Employee

1. Follow the instructions under Searching for a Person (above) to locate the individual to deactivate or terminate.
2. Click on the person's name from in the results list to view their Person Status Detail.
3. Select EDIT INFORMATION.

**Contractor Advantage** Feedback/Suggestions Log Out Help

Home > People > Order > Report > Administration Technical Support at 1-866-237-2135

### Person Status Detail : ABC Contractor - (287734)

First Name: John  
 Middle Name:  
 Last Name: Doe  
 Suffix Name:  
 SSN: XXXXX5555  
 Date of Birth: 01/01/XXXX  
 Type: Employee  
 Status: Active  
 Address 1: 123 Main Street  
 Address 2:  
 City: Atlanta  
 State: GA  
 Zip Code: 30303

User Field 1:  
 User Field 2:  
 Badge Expires:  
 Badge Number:  
 Location Number: Corporate  
 Person ID: 64  
 Current Picture:  
 Picture Load Date:  
 Picture Status:  
 Self Reported Convictions:

Compliance Expires: 02/15/2013  
 Compliance Status: **Non-Compliant**

EDIT INFORMATION  
 BEGIN ORDER PROCESS  
 PRINT CONSENT FORM  
 SUBMIT BADGE PHOTO

Order History

Order Id	Order Date	Complete Date	Package Name	Compliance Impact	Badge Required	
152321	12/03/2010		CDL Driver Plus Drug Test	Yes	NO	
	Order Ref Id	Service	Order Status	Complete Date	Case Status	Case Score
		Background	Submitted		Submitted	XXXX
	2550286	Drug Testing	Order Expired/Donor No Show	12/07/2010	Order Expired/Donor No Show	XXXX

OK

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- Click the arrow next to **Active Status** to display a list of possible statuses.

The screenshot shows the 'Person Information' form for 'ABC Contractor'. The form is titled 'Person Information : ABC Contractor' and is located within the 'Administration' section of the Contractor Advantage application. The form contains the following fields and values:

- \* First Name: John
- Middle Name: (empty)
- \* Last Name: Doe
- Suffix Name: (empty)
- \* SSN: XXXXX5555 (Numbers Only, Tax ID's will not be accepted - SSN only)
- \* Date of Birth: 01/01/XXXX (mm/dd/yyyy)
- \* Type: Employee
- User Field 1: (empty)
- User Field 2: (empty)
- \* Active Status: Active (indicated by a red arrow pointing to the dropdown arrow)
- Date Terminated: (empty)

Below the form is the 'Current Address' section with the following fields and values:

- \* Country: United States of America
- \* Address 1: 123 Main Street
- Address 2: (empty)
- \* City: Atlanta
- \* State: Georgia
- \* Zip Code: 30303
- \* Vendor Locations: Corporate - Corporate - Corporate - 1000 Alderman Drive, Alpharetta, GA-30005

At the bottom of the form, there are two buttons: 'SAVE' and 'CANCEL'.

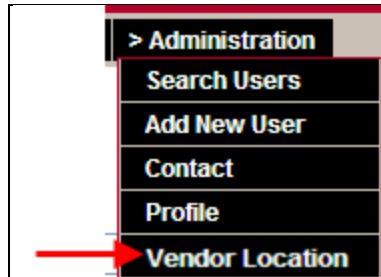
- Click on the new status for this person.
- Click SAVE to complete the status change.  
(Click **CANCEL** to cancel the status change and return to the Person Status Detail page).

## Basic Administration Functions

These tasks are performed from the **Administration** tab.

### Adding a new location

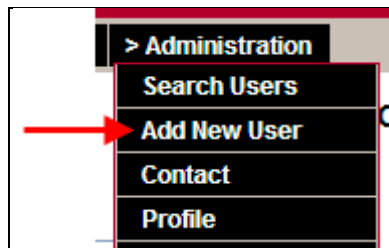
1. Click Administration> Vendor Location.



2. Click **ADD NEW**, enter the location Information and click **SAVE**. This location will then be displayed in the location list for adding people to the roster.

### Adding a new user

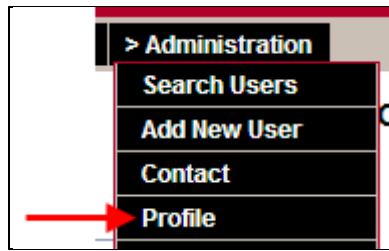
1. Click Administration>Add New User.



2. Create a User ID and Password for the individual, set their Role (Admin, View, Update, Summary) with the necessary level of access, and **SAVE**.

## Changing email notification preferences and updating passwords

1. Click Administration > Profile.



2. Under **User** Notifications, you can see what notifications you are currently receive. You can change these settings at any time. Make your new selections and click **SAVE**.

**User Notifications**

Do you want to receive an order confirmation email when you submit an order?

Do you want to receive an email when an order has completed?

Do you want to be notified for all orders within your account, or only the orders you have submitted?

**SAVE** **CHANGE PASSWORD**

3. From the **Profile** screen, you can also change your password. Enter your new password in both boxes and click **Save**.

\* New Password

\* Re-Enter New Password

**SAVE** **CANCEL**