Managing Users

CBSS

New Background Screening Platform

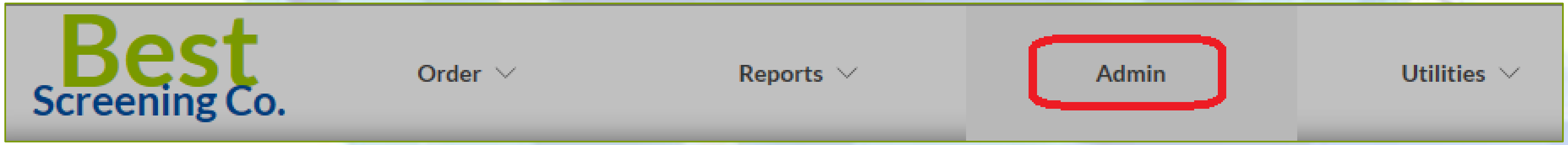
Managing Users

Enter Username and Password

Managing Users

On the top toolbar, click on ‘Admin’.

Please note: Only the primary contact/administrator on the account is set up with Admin access by default. If you need to manage your users but do not see the ‘Admin’ tab, please contact your administrator or our office for assistance.



Managing Users

On the Client Configuration screen you will see your current user listing.

Client Users

+ User

User	Job Title	Phone	Ext	Status	Date Created	Created By	Date Modified	Modified By	Actions
Doe, John				ACTIVE	02-23-2018 4:53 PM MST	Smith, Jane			
Smith, Jane				ACTIVE	12-20-2017 12:02 AM MST				

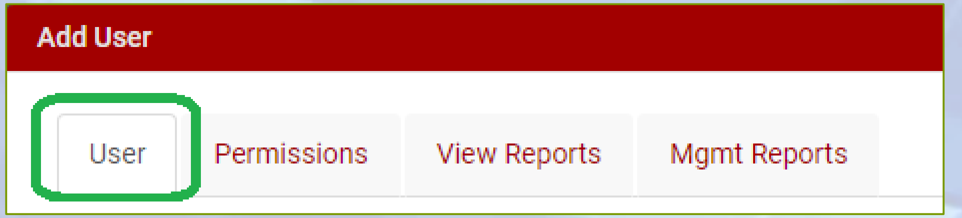
From this screen, you can:

- View information about current users, such as their status ACTIVE or session history
- Modify settings for current users
- Delete a user
- Add a new user + User

Managing Users – Adding a New User

To add a new user, click the Add User button: 

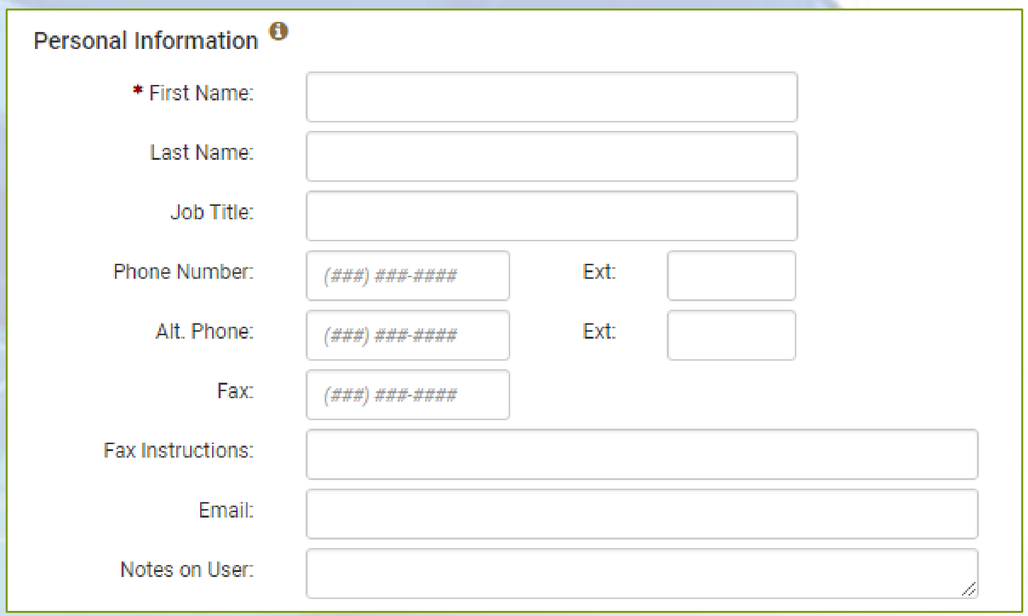
The ‘Add User’ window will pop up and display the first tab: User



Managing Users – User Tab

In the ‘Personal Information’ section, you are required to enter a First Name. Although not required, we suggest also providing a **Last Name** and an **Email Address**. An email address is necessary if the user would like to receive notifications about completed reports, in addition to other possible notifications.

All other fields in this section are optional.


Personal Information

* First Name:

Last Name:

Job Title:

Phone Number: (###) ###-#### Ext:

Alt. Phone: (###) ###-#### Ext:

Fax: (###) ###-####

Fax Instructions:

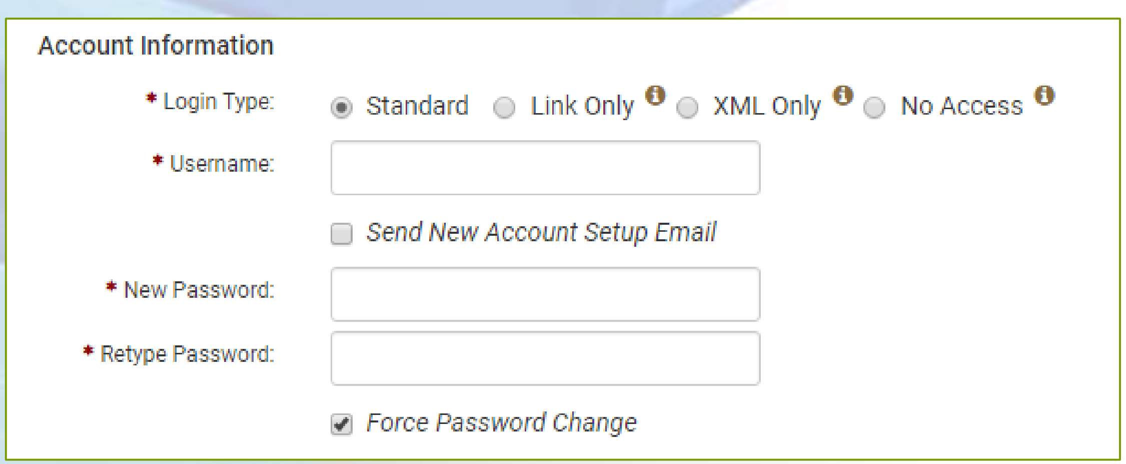
Email:

Notes on User:

Managing Users – User Tab

In the 'Account Information' section, you will assign user credentials.

- Login type is standard
- Assign a user name
- Checking the 'Send New Account Setup Email' box will email the user a link where they can choose their password; if you do not check that box you must manually assign a password and then provide those credentials to the user in another manner
- If you manually assign a password, we suggest choosing a temporary password and checking the 'Force Password Change' box so the user will be asked to create a new password upon their first login



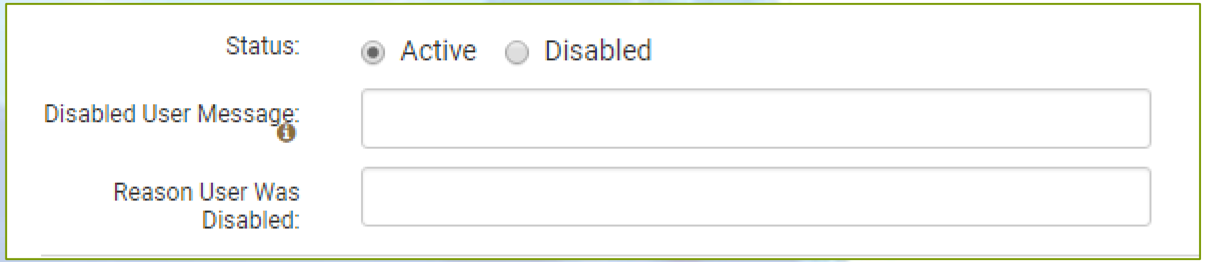
Managing Users – User Tab

Password Information

- Must be at least 8 characters and contain at least one letter and one number
- Must be changed every 90 days by default (this setting can be changed to 30 or 60 days by request)
- Passwords are encrypted in the system, so they are not visible (the password fields will always appear blank)
- If a user forgets their password, they can:
    - Use the ‘Forgot Password’ feature on the login page
    - Contact their administrator, who can reset their password by entering a temporary password in the password fields and clicking the ‘Force Password Change’ box

Managing Users – User Tab

At the bottom of the 'Account Information' section, you can view or change a user's status.



A user may be disabled if:

- Too many failed login attempts
- Their login expires from non-use
- An administrator changes their status to Disabled

'Disabled User Message': Use this field to create an <u>external</u> message that will be displayed if the user attempts to log in. This will override the default message.

'Reason User was Disabled': Use this field to create an <u>internal</u> message explaining why the user was disabled.

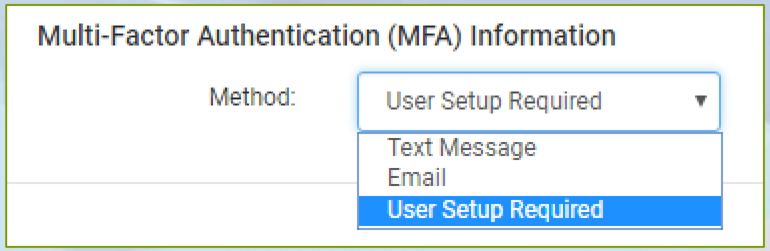
An administrator can change the status back to Active if a user is disabled.

Managing Users – User Tab

The last section on the User Tab is ‘Multi-Factor Authentication (MFA) Information.’

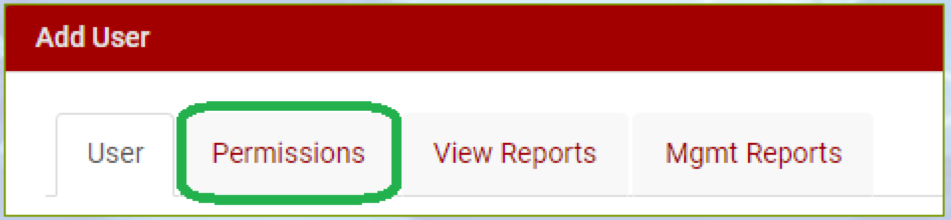
MFA is a security measure that allows the system to verify that only verified users can log in by either emailing or texting a 6-digit code each time the user attempts to log in from a new location or browser.

When creating a new user, you may opt to choose their MFA method (text or email), or you may simply choose User Setup Required, which means the user will be prompted to choose a method upon their first login. This can be changed later if necessary.



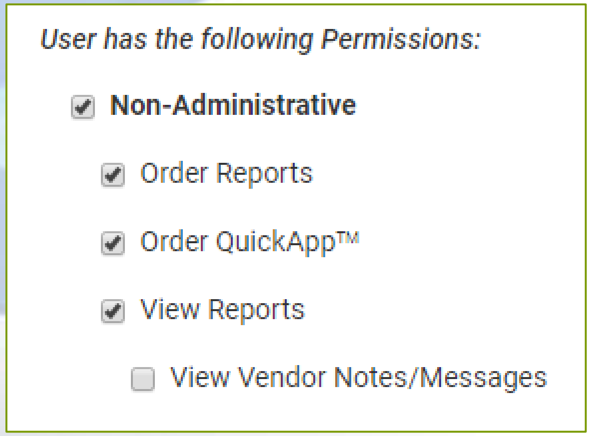
Managing Users – Permissions Tab

Please Note: After completing all required information on the 'User' tab, you must also assign permissions on the 'Permissions' tab in order for the user to place orders or view results.



Non-Administrative Permissions

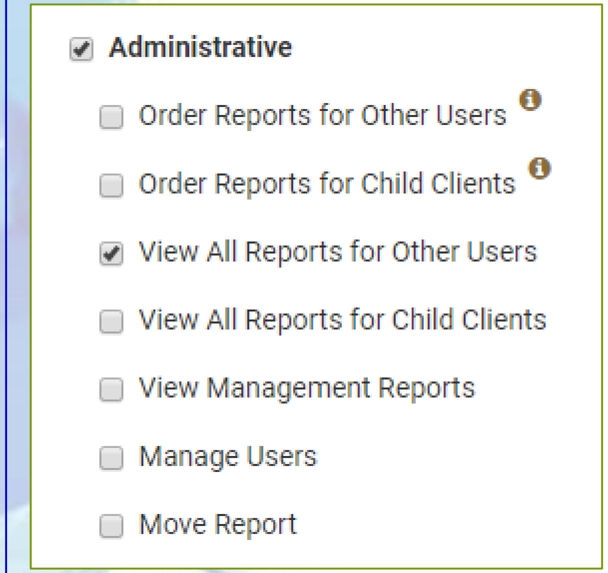
- **Order Reports**: allows the user to place manual entry orders
- **Order QuickApp**: allows the user to initiate a QuickApp order
- **View Reports**: allows the user to view results
- **View Vendor Notes/Messages**: allows user to view interim notes/statuses that may be posted by researchers



Managing Users – Permissions Tab

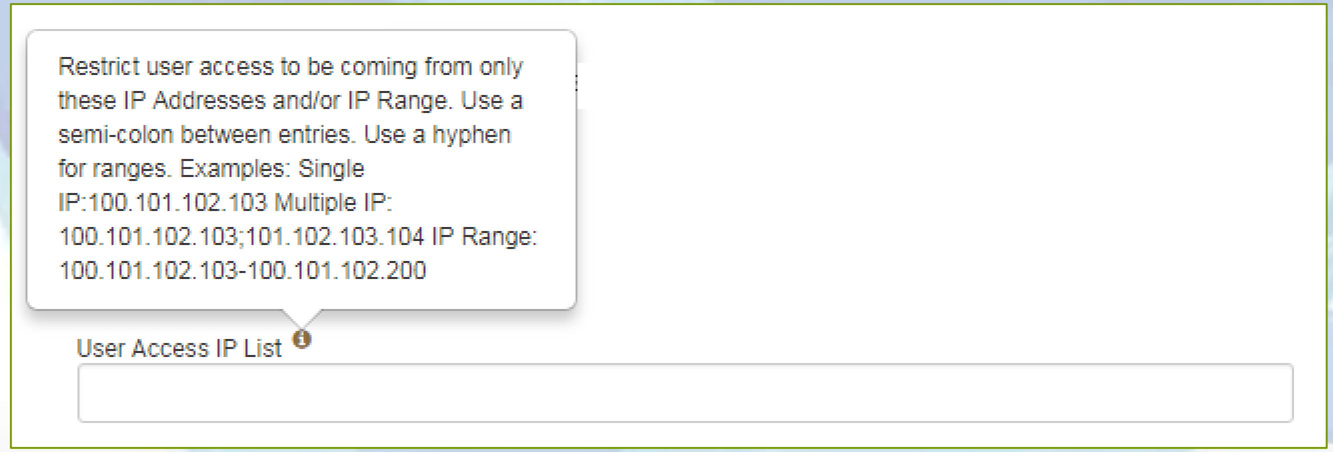
Administrative Permissions

- **Order Reports for Other Users**: allows the user to place orders for other users (useful if the requester wants report notifications to be emailed to another user)
- **Order Reports for Child Clients** *(for multi-location clients only)*: allows the user to place orders for child locations (e.g. division/branch locations)
- **View All Reports for Other Users**: allows the user to view all results for that location, regardless of the original requester; if unchecked, the user will only be able to see results for their own orders
- **View All Reports for Client Clients** *(for multi-location clients only)*: allows the user to view results for all child locations
- **View Management Reports**: allows user to view any reports designated on the 'Mgmt Reports' tab
- **Manage Users**: allows users to add/delete/edit other users
- **Move Report** *(for multi-location clients only)*: allows the users to move a report from one location to another



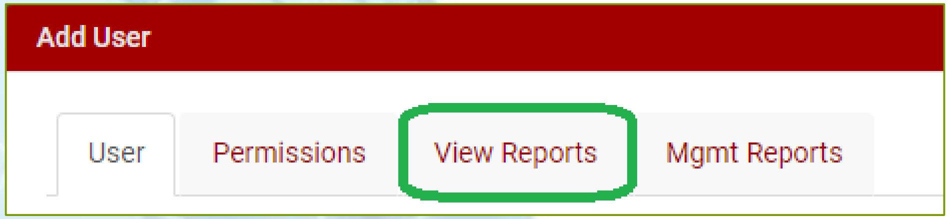
Managing Users – Permissions Tab

User Access IP List: For additional security, you may specify an IP address(es) or IP range from which the user may access the system. This can be used to limit access from unauthorized locations such as the user's home or mobile device.



Managing Users – View Reports Tab

The ‘View Reports’ tab specifies which elements of the Report page the user can view. All options are typically checked by default; however, if a particular user is restricted from viewing certain part(s) of results, these options can be unchecked.



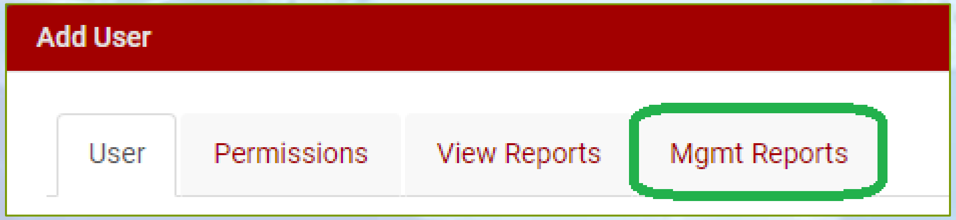
Background Check search types: Identity Development, Credit, Investigative, Verification, Credentials, and Report Summarization are components of the background check results

Substance Abuse Screening: Drug test results

Letters: Allows user to generate and email adverse action and consumer notices to applicants; we recommend this be restricted to the user(s) responsible for FCRA compliance

Miscellaneous: Allows the user to view attachments (such as signed authorization forms) and/or access I-9 and E-Verify links (*client must be set up for these options*)

Managing Users – Management Reports Tab



The 'Management Reports' tab allows you to specify which types of management reports, if any, the user can access.

Once you have completed all 4 tabs, click 'Save' to create the user.

Managing Users – Quick Reference

✓ **When creating a new user, don't forget to assign Permissions.**

✓ **If a user forgets their user name:**

- Use the 'Forgot User Name' feature on the login page
- Contact their company administrator
  - Administrator can access the user name from user's settings on the Admin | Client Configuration screen
- Contact our office for assistance

✓ **If a user forgets their password:**

- Use the 'Forgot Password' feature on the login page
- Contact their company administrator
  - Administrator cannot view the current password, but they can assign a temporary password from user's settings on the Admin | Client Configuration screen; simply type the temporary password in both password fields **and** check the 'Force Password Change' box
- Contact our office for assistance