




Using the Client Module



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Logout

Report Management

Applicant Status Box

	Inbox	0
	In Progress	0
	Status Update	0
	Needs Attention	0
	Complete	(2)
	Archived	0

[help?](#)

Home

Welcome back deverus support
August 05, 2005

deverus, Inc. Messages

testing 1 message

Contact Us

Email: services@deverus.com
Voice: 888-406-7545
Fax: 512-532-6613

Your Notes

* These notes are for your personal use and they will not be sent to or viewed by deverus, Inc.
[create note](#)

Find My Reports

Last Name

First Name

SSN - -

DOB

search all users

Order Reports

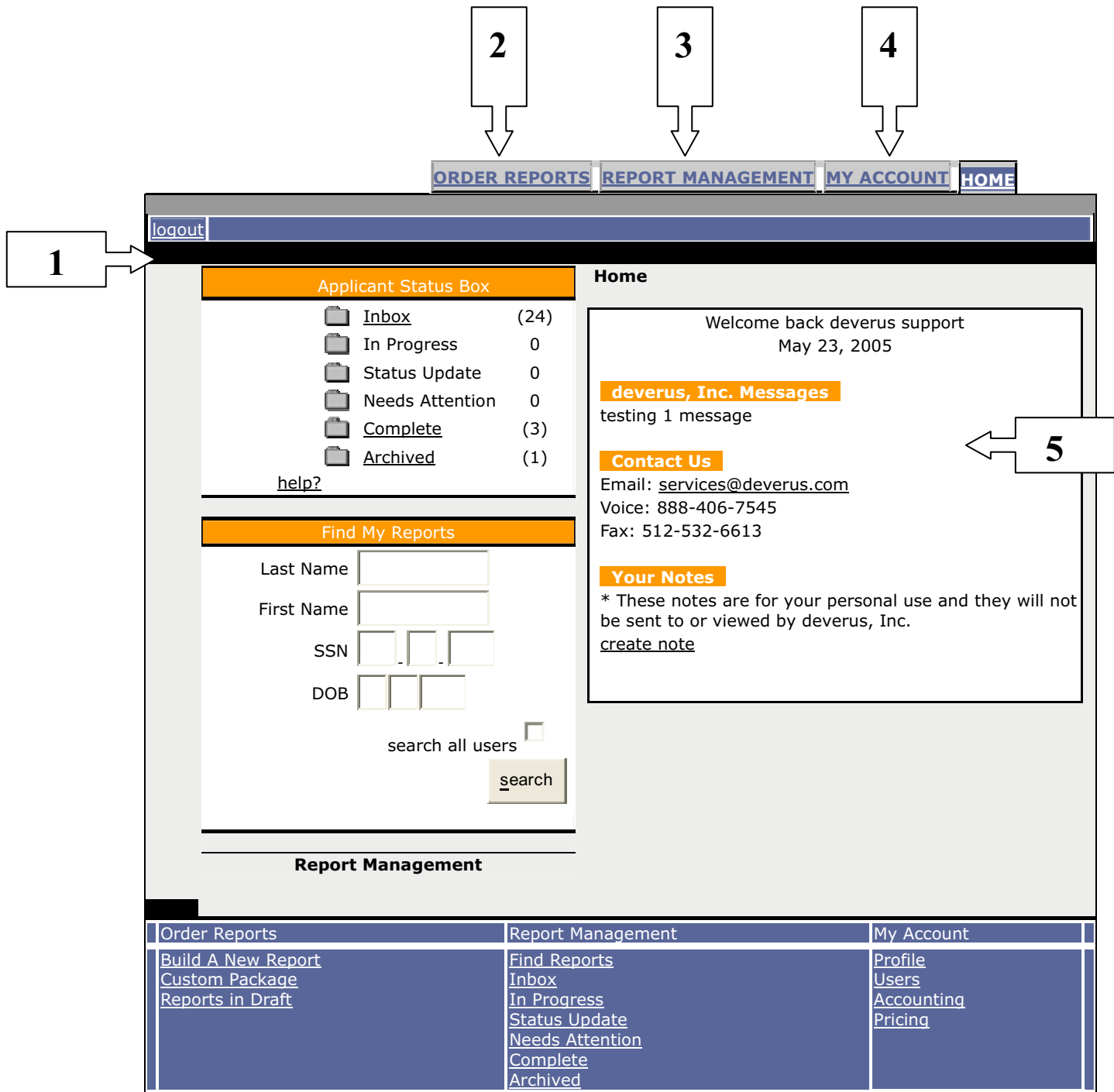
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Report Management

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APPLICANT STATUS BOX

The applicant status box provides at-a-glance-status and easy access to reports in various stages of completion. It also provides quick access to report management, rather than clicking on the report management tab. The applicant status box was designed using a familiar folder-based scheme, and it operates much like many email programs. The number next to each folder indicates the number of reports within that category.

Applicant Status Box		
	Inbox	(24)
	In Progress	0
	Status Update	0
	Needs Attention	0
	Complete	(3)
	Archived	(1)
help		

To access the above folders click any folder name. By clicking on any folder it will open up the report management screen. Below are descriptions for each of the folders above.

Report Status

We will use the terms "searches" and "reports" when explaining the order and result delivery process.

A "search" is any individual request for one of our products. For example, a county criminal request is one search, two county criminals and one education verification, would be three searches.

A "report" refers to all searches ordered on a single applicant at one time. Think of it as a group of searches. This is the case even if the report is comprised of only one search. For example, a report can be anything from one county criminal to five education verifications, as long as they were ordered at the same time on one individual.

Inbox

Anytime a search within a report is completed, the entire report can be viewed in the "Inbox," and here you can review the status of all the searches within that particular report. Once all completed searches are reviewed and marked as read, the report moves to the "complete" box.

In Progress

Once a report is ordered, it is moved into the "In Progress" folder. A report will be viewable in the "In Progress" folder any time there is at least one search that has an "In Progress" status. Often,

the term "In Progress" is used interchangeably with "pending", however, for consistency, we will always refer to a search that is not complete as "In Progress".

Status Update

This folder helps you easily find searches that have had status updates. Whenever a status of an individual search is returned, i.e., "pulling files", "slow county", or "courts closed", it will be shown in the "Status Update" folder. In addition, you will receive an email to inform you of the search's status. Once you have read all the unread comments within a particular report, it will no longer appear in the "Status Update" folder. Any time a search has unread notes, the report it belongs to will be viewable in the "Status Update" folder.

In all folders, any searches that have unread notes, will be indicated by a red asterisks next to the "view notes" link.

Needs Attention

When a researcher or information source requests more information such as a last name, DOB or drivers license number, it is sent to the "Needs Attention" folder where you can add the appropriate information. In addition, you will receive an email requesting the appropriate information.

Complete

Once all the searches within a single report are completed and have been marked as read, the full report appears in the "Complete" folder. It remains in the "Complete" folder unless you choose to move it to "Archived". Once a report is completed, it can be removed from the "Complete" folder and placed back in the "Inbox" folder by de-selecting "mark as read" on the right hand corner of any search within the report.

Archived

After a report is completed, you can move it to "Archived" to avoid storing a large number of reports in your "Complete" folder. The advantage is that moving the reports to "Archived" will remove those reports you no longer need to view and quicken the response time for displaying reports that are in the "Complete" folder. This is especially important when you order a large number of reports and when access to the complete box is slow. Once a report is archived, it can be removed from "Archived" and placed back in "Complete" by deselecting "Archived" on the right hand corner.

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ORDER REPORTS

↓
2



Order New Reports

Status Box

- [Build a New Report](#)
- [Choose Searches](#)

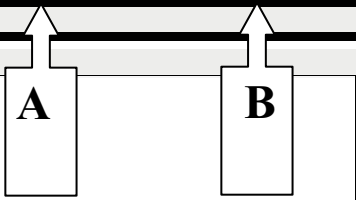
Tips for Ordering

1. Choose searches to run in your report. Click the radio box to include the search (you can choose one or many).
2. Click on the search for description and/or availability (this step is useful when running instant and statewide reports).
3. Click "Continue" to enter applicant information.

Build a New Report

Choose Searches

- | Searches | |
|--------------------------|--|
| <input type="checkbox"/> | Instant Criminal |
| <input type="checkbox"/> | Past Plus (SSN/Address Verification) |
| <input type="checkbox"/> | County Criminal |
| <input type="checkbox"/> | Federal Criminal |
| <input type="checkbox"/> | County Civil |
| <input type="checkbox"/> | Federal Civil |
| <input type="checkbox"/> | Education Verification |
| <input type="checkbox"/> | Employment Verification |
| <input type="checkbox"/> | Reference Verification |
| <input type="checkbox"/> | Professional License Verification |
| <input type="checkbox"/> | Bankruptcy Check |
| <input type="checkbox"/> | Driving History |



[Continue](#)

Order Reports	Report Management	My Account
Build A New Report	Find Reports	Profile
Custom Package	Inbox	Users
Reports in Draft	In Progress	Accounting
	Status Update	Pricing
	Needs Attention	
	Complete	

Order reports allow you to place an order in the system to be sent through to a researcher or a database system for results.

1. Click the “order report” tab and you will see the build a new report screen as shown above.
2. If you wish to order reports individually for this applicant under build a screening **A** , place a check mark next to the desired services then click **continue**
3. If you wish to do a pre-defined package of services, including your default package, click the **B** “screening packages” sub tab.

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ORDER REPORTS | REPORT MANAGEMENT | MY ACCOUNT | HOME

Logout | Instant SSN Validation & Past Address | Instant Criminal Search | **Build A Screening** | Screening Packages | Reports In Draft

Order Reports

Status Box

- Build a New Report
- Choose Searches
- Create Applicant
- Past Plus (SSN/Address Verification)

Build a New Report

Choose Searches | **Applicant Information**

Create Profile

Additional Name/Address

* Required Fields

First name: * john

Middle name:

Last name: * doe

Date of Birth: / / (mm/dd/yyyy)

Social Security: * 555 - 55 - 5555

Street:

City:

State: [v]

Zip:

Reference Code:

Continue

Order Reports | Report Management | My Account

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Order Reports**Build a New Report****Status Box**

Build a New Report

- Choose Searches
- Create Profile
- Past Plus (SSN/Address Verification)**
555-55-5555
- Confirm and Place Order

Applicant Information

First Name: john
Middle Name:
Last Name: doe
Date of Birth:
SSN: 555-55-5555
City:
State:
Zip:

[Choose Reports](#)[Manage Profile](#)**Past Plus (SSN/Address Verification)**[Confirm](#)

555-55-5555

[Summary](#)

A Past Plus (SSN/Address Verification) will be performed on 555-55-5555.

[Order Reports](#)[Build A New Report](#)[Custom Package](#)[Reports In Draft](#)[Report Management](#)[Find Reports](#)[Inbox](#)[In Progress](#)[Status Update](#)[Needs Attention](#)[Complete](#)[Archived](#)[My Account](#)[Profile](#)[Users](#)[Accounting](#)[Pricing](#)**Order Reports****Build a New Report****Status Box**

Build a New Report

- Choose Searches
- Create Profile
- Past Plus (SSN/Address Verification)**
555-55-5555
- Confirm and Place Order

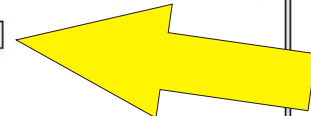
Applicant Information

First Name: john
Middle Name:
Last Name: doe
Date of Birth:
SSN: 555-55-5555
City:
State:
Zip:

[Choose Reports](#)[Manage Profile](#)**Past Plus (SSN/Address Verification)**[Confirm](#)**Past Plus (SSN/Address Verification)**[REMOVE](#)

SSN	Avg Turnaround	Status	Price
555-55-5555	Instant	<input checked="" type="checkbox"/>	\$0.00

Order Total: \$0.00

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