TE Screener FAQ's (Parent Company)

Q1. How do I add a child company?
A1.
- From main menu click Administration, Account Setup
- Click New Client to the left of the parent company
- Enter all information, click Save

Q2a. How do I add a user to the parent company?
A2a.
You must be logged in as a VC Manager:
- From main menu click **Administration, Account Setup**
- Click edit on the parent company
- Click **Users, New User**
- Enter all information, click **Save**

Q3. How do I set up my subscriber code information?
A3.
You must be logged in as a VC Manager
If using parent company subscriber code information:
- From main menu click **Administration**
- Click **Account Setup**, edit the parent company
- Click **Tenant** or **Employment**
- Click **Subcodes,** enter subscriber information, click **Save**

If using child company subscriber code information:
- From main menu click **Administration**
- Click **Account Setup**, edit the child company
- Click **Tenant** or **Employment**
- Click **Subcodes**, enter subscriber information, click **Save**

Q4. How do I set up my credit report to auto pull?
A4.
You must be logged in as a VC Manager:
- From main menu click **Administration**
- Click **Account Setup,** edit the company
- Click **Tenant** or **Employment**
- Click **Setup, Credit Report Options,** check off **Auto Pull**
- Choose **Response Notifications,** click **Save**

Q5. How do I set up a service?
A5.
You must be logged in as a VC Manager:
- From main menu click **Administration, Account Setup, Services**
- Enter **Service Name, Screening Type, Price, Product Code, Service Type,**

- Check off **" Al La Carte"** if offering service as an optional service
- Click **Add,** then **Save**

Q6. How do I set up a package?
You must be logged in as a VC Manager:

- From main menu click **Administration, Account Setup, Services, Packages**
- Enter **Package Name, Price, Product Code, Screening Type**
- Enter description of **Package**
- Check off **Services** to be included with Package
- Click **Add,** then **Save**

Q7. How do I set up an expanded package?
A7.
You must be logged in as a VC Manager:

- From main menu click **Administration, Account Setup, Services, Expanded Packages**
- Enter **Expanded Package Name, Screening Type, Description, & Base Package to Include**
- Create **Option for Package, Add,** then **Save**

Q8. How do I offer services/packages to my clients?
A8.
You must be logged in as a VC Manager:

- From main menu click **Administration, Account Setup**
- Edit appropriate client
- Choose **Tenant** or **Employment, Services Set Up**
- Choose **None, Offer** or **Pre-select** for each service or package
- Click **Save**

Q9. How do I set up Ancillary Database information?
A9.
(Access to service must be enabled through TCI)
You must be logged in as a VC Manager:

- From main menu click Administration, Account Setup
- Edit appropriate client
- Choose Tenant or Employment
- Enter database information, click **Save**

Q10. How do I set up my client for tenant or employment screening?
A10.
You must be logged in as a VC Manager:

- From main menu click **Administration, Account Setup**
- Edit appropriate client
- Go to **Account Type,** choose desired screening type, click **Save**

Q11. How do I set up a disclaimer for my client?
You must be logged in as a VC Manager:

- From main menu click **Admintration, Account Setup**
- Edit appropriate client
- Check off **Enable Disclaimer**, enter disclaimer, click **Save**

Q12. How do I set up a default investigator for my client?
A12.
You must be logged in as a VC Manager:
- From main menu click **Administration, Account Setup,**
- Edit appropriate client
- Go to **Account Type**, choose investigator from drop down, click **Save**

Q13. How do I assign an application to a user who is not set up as a default investigator?
A13.
- From main menu click **Administration, App Pool**
- Check off the applications that need to be assigned
- Click on the **Assign To:** drop down, choose user
- Click **Assign**

Q14. How do I pull a credit report via the Work Queue?
A14.
- From main menu click **Work Queue**
- In the **Work Queue Summary**, click applicant's name
- In **Work Queue** click on **Credit Report icon**
- Choose desired bureau to pull report from, then **Submit**
- Go to **View Report**

Q15. How do I fill out a verification?
A15.
- Bring up applicant in work queue
- Click on the desired service (icon)
- Enter information, click appropriate status, then Add/Save

TE Screener FAQ's (Client Company)

Q1. How do I submit an application?
A1.
- From main menu click **Tenant** or **Employment** Application
- Enter information
- Choose services or packages (preset by Screening Company)
- Click **Submit**

Q2. How do I view a report that has been completed and returned to me?
- Depending on user level, from main menu click **Mailbox**
- Choose applicant, click on **Report** icon

- **Final Report** will be generated in Adobe

Q3. How can I view a service status before an application is completed?
A3.
You must be logged in as a Manager or Supervisor:
- From main menu click **Application Status**
- You can now view **Name, App No, Date/Time App Submitted, Requestor** and **Status** of services for all applications submitted

Q4. How can I clear out the Mailbox?
A4. *You must be logged in as a Manager or Supervisor:*
- From main menu click **Mailbox**
- Check off the applicants to be removed
- Click **Remove**

Q5. How do I set up a user?
A5.
You must be logged in as a Manager:
- From main menu click **Setup, New User**
- Enter information, assign user level, click **Save**

Q6. How do I search for an application?
A6.
- From main menu click **Search**
- Enter criteria, click **Search**
- All records within criteria will display

Q7. How do I disable a user who no longer needs access to the program?
A7.
You must be logged in as a Manager:
- From main menu click **Setup, Edit User**
- Uncheck **Set Status to Active** box, click **Save**

Q8. How do I send specific instruction to the Screening company regarding this applicant?
A8.
- Enter application
- Go to **Instruction** box, enter instructions, click **Submit**

Q9. How will I know when my report is ready?
A9.
An e-mail notification can be set up via the Screening company that will alert you to new application in the Mailbox.

Q10. I need to enter in more information than what is being allowed on the screen, what should I do?
A10.
You have been set up with a **"Quick App".** If you need to enter in additional information on the application;

- From main menu click **Tenant** or **Employment Application**
- Click on the link for **Extended Application**
- Enter information, **Submit** like you normally would