

eShortLineSM

 a service of eVeriFile

Thank you for using eShortLine's state of the art web-based platform!

This quick start guide has been created to help our clients with navigating through the most common tasks in the new eShortLine software platform. The guide takes you step-by-step through each process available in the system allowing you to quickly learn the necessary tools to manage your background check and screening requests.

As always, you can contact us at 855-383-7434 to speak with a customer service representative or email us at support@everifile.com .

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Vendors

Step 1: Logging In

In order to log into your company's eShortLine account, please go to <https://shortline.everifile.com/renovo/>.

When logging in for the first time, you will be asked to choose security questions and to create your own password. Below is the password criteria:



- 8 character minimum
- Must have at least one (1) capital letter
- Must have at least one (1) lower case letter
- Must have at least one (1) symbol (preferably one of the following: @, #, \$, !, *)

If you are a customer migrating from our Legacy platform, your username is the same and your password is your username + current year (e.g. jsmith2016 or jsmith2017). If your company has migrated, but you have not received any login information, please contact Customer Support at 855-383-7434 or support@everifile.com.

Step 2: Understanding Your Dashboard

“Required Tasks”

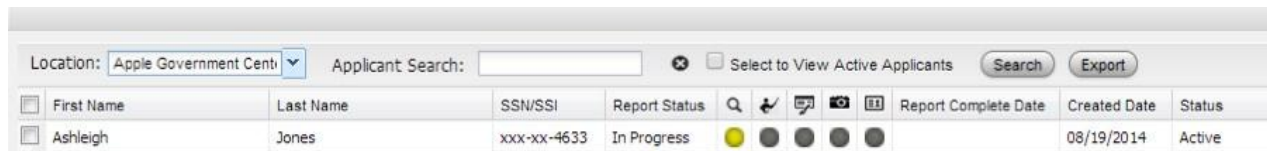
Once you are logged into the eShortLine system you will be on the Client Administration Page. This is where your Required Tasks items will be listed. This page quickly informs you of any activities that need your attention such as, uploading a photo or being notified of an employee denial. Many of these actions can be managed directly by clicking on the action. A new screen will appear to the right allowing you to upload your photo or see the denial reason. Once you have accomplished the task at hand it will be removed from your Required Tasks list after selecting the “Complete” button at the bottom of the page.



“Applicant”

If there are no activities in your Required Tasks list, you will be taken to the Applicant page. On the Applicant page you can add, view, edit, or run background checks reports on your submitted applicants. The bulk upload feature is also located on the applicant page, so you can upload and submit several applicants in one standardized template at one time versus entering applicants individually or in a small group. You will also be able to view the status of each employee to determine where they are in the eShortLine badging process. If you take a look at one of your applicants, you will be able to see multiple fields that are signaled by different colored lights. Based on the color of the light you will be able to determine the status.

- **Grey:** No action has been taken to complete the action
- **Green:** “Clear” or “approved”
- **Yellow:** In progress
- **Red:** “Failed” or “needs review”



First Name	Last Name	SSN/SSI	Report Status	Report Complete Date	Created Date	Status
Ashleigh	Jones	xxx-xx-4633	In Progress		08/19/2014	Active

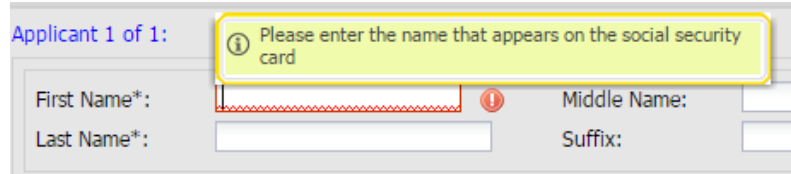
Going from left to right you will find the below columns for each applicant:

- First Name
- Last Name
- SSN/SSI
- Report Status – this will either show “In Progress” or “Completed.” If the status is “Completed” it will be color coded Green if the report is “Clear” or Red if the report “Needs Review”
- Background Report
- Training
- Testing
- Photo
- Badge
- Report completed date
 - Applicant created date

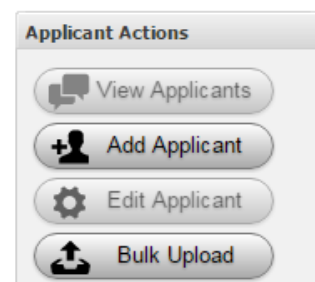
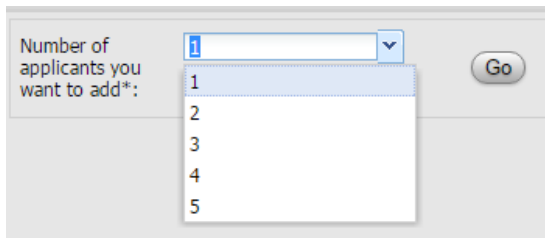
- Applicant status – Active or Inactive

Step 3: Submitting an Applicant (Individual and Multiple Entry)

Submitting an applicant into the eShortLine system will allow you to request a background check report on this individual. It is important to note that in order to have a report ordered you must enter the required government identification (i.e. Social Security Number or Supplemental Security Income Number) and enter the applicant's name as it appears on their Social Security card.



By selecting “Add Applicant” you will be able to add 1 to 5 individuals at a time. A dropdown box will be available for you to determine the number of individuals you wish to enter in one online session. Once you have selected the number and click “Go” you will be brought to a new screen to enter the applicant’s personal information. From this one screen you will be able to add your applicant, select Railroad Program(s), and chose your location.

All fields marked with an “*” are required to be completed for the applicant information to be saved. Once all the required information is entered correctly, save the applicant’s information.

Please note the “enable” checkbox at the bottom of the information window. This marker is to designate this applicant as an active applicant in your organization.

Address Line 1*:

Address Line 2:

Country*:

City*:

State*:

Zip Code*:

Gender:

Date of Birth*:

SSN/SSI*:

Personal Phone:

Active:

Email:

Re-Enter Date of Birth*:

Re-Enter SSN/SSI*:

Drivers License:

Drivers License State:

Programs

<input type="checkbox"/>	Programs	Enterprise
<input type="checkbox"/>	Central Florida Rail Corridor Screening Program	Florida Department Of Transportation
<input type="checkbox"/>	Kansas City Terminal Railway Screening Program	Kansas City Terminal Railway

Location

Location:

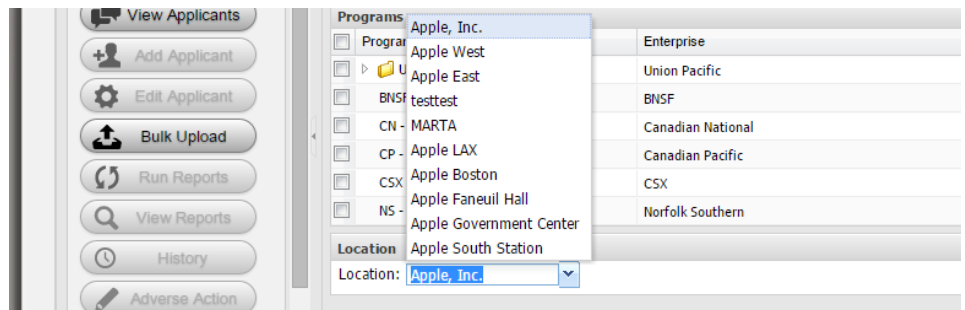
Adding an Applicant to a Specific Location

There are two different ways to add an applicant to a specific location.

- Add an Applicant First:

After choosing the number of applicants that you would like to enter, the bottom of the screen where you input the employee information will have a Location drop-down menu.

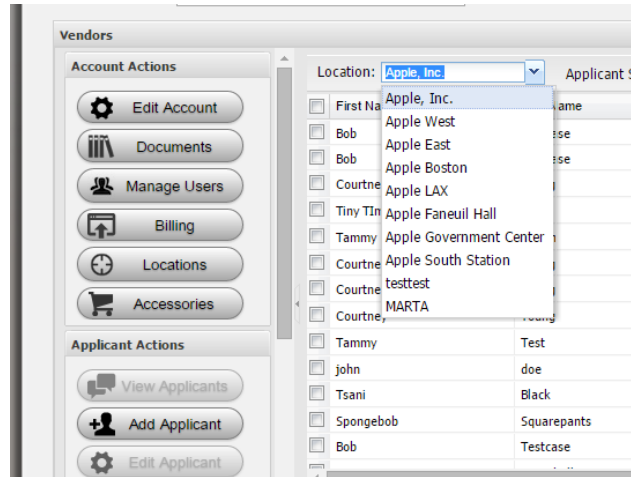
Choose the location where you would like the employee to be assigned to before clicking the "Save" button. The applicant



will appear under the specific location.

- Choose the Location First:

From your dashboard, choose the desired location from the Location drop-down menu. Next, click the “Add Applicant” button and fill in the required information as usual. The chosen location will appear on the add applicant screen.



Step 4: Editing an Applicant/Uploading a Photo

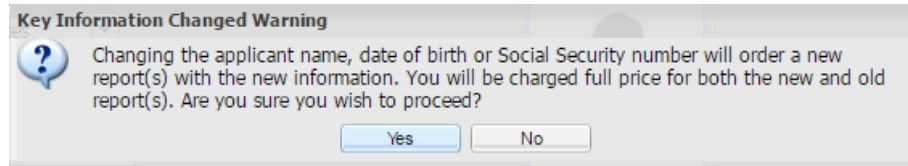
To edit an individual’s personal information or to add a photo you will need to access the applicant’s profile. To do so you will select the appropriate location at the top of the screen. Click on the box to the left of the applicant’s name and then select “Edit Applicant” from your menu on the left.

Editing an Applicant

Updating an applicant’s personal information is easy. Select the field you wish to edit and put the corrected information in the field. Once completed you will select the “Save” button located at the bottom of the page.

By editing an individual’s personal information, it may result in a new background check being ran. Information that would cause a new background check would be first/last name, DOB, or the social security number.

After updating any of the above key pieces of information and clicking the Save button at the bottom of the screen, you will receive the following pop-up:



Uploading a Photo



Select the Camera Icon within the applicant profile then click the “Browse” button to search for an image that has been saved to your computer.

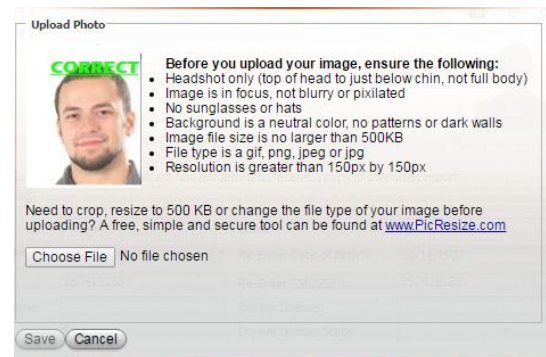
Once you have successfully uploaded the photo you will select “Save.” This will take you back to the Applicants screen and you should see a yellow dot under the photo icon; this means that the photo is under review.

<input type="checkbox"/>	First Name	Last Name	SSN/SSI	Report Stat..	Q	↶	↷	📷	🗑️
<input type="checkbox"/>	Jessica	Chastain	xxx-xx-9283	Completed					
<input type="checkbox"/>	Rebecca	Morris	xxx-xx-9621	In Progress	●	●	●	●	●

Photos are not restricted by size, however, the photo should only be a headshot: just beyond the applicant’s ears and from the top of the head to just below the applicant’s chin.

Photo Specifications are as Follows:

1. Person being photographed must directly face the camera
2. Person being photographed should be in front of a neutral, light-colored background
3. Photos in which the person being photographed is wearing sunglasses or other items that detract from the face will not be accepted
4. Photos of applicants wearing head coverings or hats are only acceptable due to religious beliefs, and even
5. then, may not obscure any portion of the face of the applicant
6. The image must be in the Joint Photographic Experts Group (JPEG)



format

- The maximum file size will be limited to no more than 500KB in 24 Bit color

Fixing a Rejected Photo

If the photo that you uploaded for an applicant has been rejected, the following will occur:

- There will be a red dot under the Photo icon for the applicant

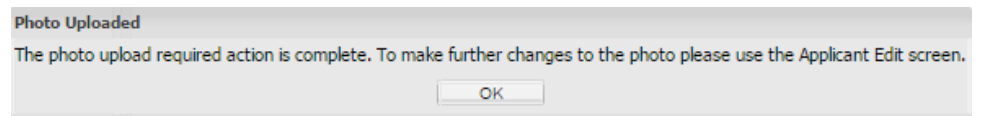
<input type="checkbox"/>	First Name	Last Name	SSN/SSI	Report Stat...	Q	↩	💬	📷	📄
<input type="checkbox"/>	Jessica	Chastain	xxx-xx-9283	Completed					
<input checked="" type="checkbox"/>	Rebecca	Morris	xxx-xx-9621	In Progress			●	●	●

- A rejection notification will appear under the Rejected Photos tab on your Required Tasks list



To upload a new photo, click on the applicant's name in your tab. The current photo will appear as well as the reason for rejection.

Once a new photo is uploaded, the pop-up message below appears:



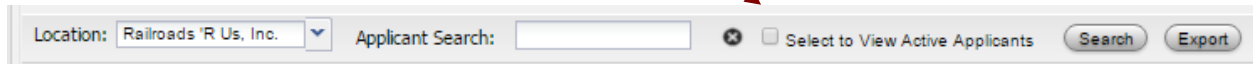
*Please note, you **must** upload a new photo for the applicant through the required task list in order for the photo to be reviewed again and approved. *

Deactivating/Reactivating an Applicant

You can deactivate an applicant by checking the box next to the applicant's name, then clicking on the "Deactivate" button. Doing this invalidates an active badge and removes the applicant from your Required Tasks list. This will not remove the applicant from your account; once an applicant is input into the system, there is no way to remove him or her.

If you would like to view only the active applicants in your account, click on the Applicants tab

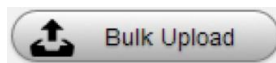
and check the box labeled “Select to View Active Applicants”, then click the Search button.



Location: Railroads 'R Us, Inc. Applicant Search: Select to View Active Applicants

To reactivate an applicant, go to Edit Applicant, then click the checkbox next to the word “Active”. Then, click “Save”. You will then need to send an email to support@everifile.com, requesting that the applicant be re-enrolled in the programs of your choosing.

Step 5: Bulk Applicant Uploads



Using our bulk applicant upload feature allows you to submit all your applicants at once using an excel spreadsheet containing the necessary fields for the system. You can use our bulk upload template or you can create your own. If creating your own, you will be able to map your field names to our standard template before uploading the file by following the instructions listed below.

To begin a bulk upload, create an Excel file with a unique column for each field. Each of these columns will be mapped to the appropriate fields upon upload. The acceptable versions of Microsoft Excel are Microsoft Excel 2005 through 2013. The required fields are as follows:

- First Name
- Middle Name
- Last Name
- Name Suffix
- Date of Birth
- Social Security Number
- Driver’s License Number
- Gender
- Phone Number
- Email Address
- Address 1
- Address 2
- City
- State
- Province (if outside US)
- Country

After you have entered all the information into the Excel spreadsheet, save the file with a unique name and date using the XLS or XLSX extensions. Then, from the Applicants page, choose the “Bulk Upload” button.

Next, you will select the Excel file by clicking the browse button and selecting the file you saved in the last step. Once you have chosen the file click the “Upload File” button.

You will now be able to map your custom fields to the standard upload fields in the system. Mapping the fields is as simple as dragging the appropriate column name from your Excel spreadsheet to the corresponding field in the bulk upload window.

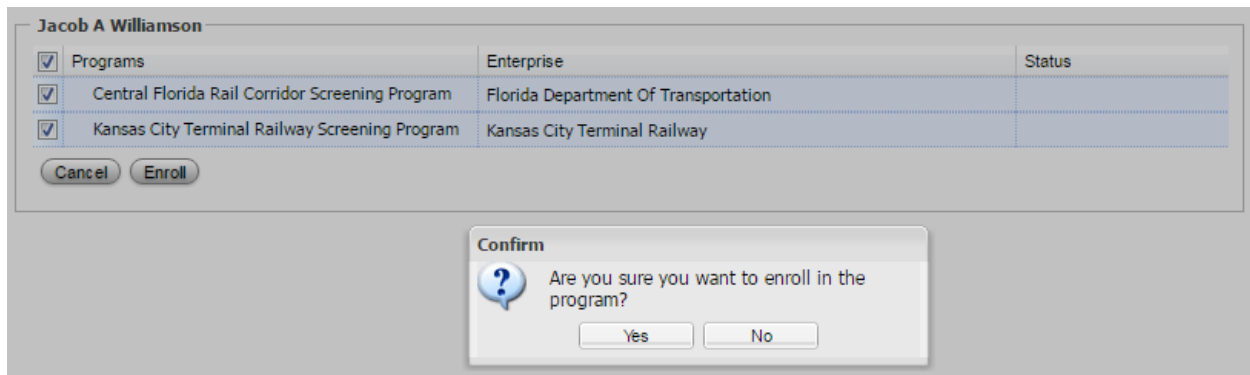
Once you have mapped all the fields, scroll to the bottom of the screen and click the “Submit” button.

Step 6: Assigning a Program

To add a program to an already existing entry, select the applicant by placing a checkmark in the box next to the applicant’s name and click the “Programs” button.

A window will appear allowing you to select the appropriate railroad programs for the applicant. Place a checkmark in the box next to the railroad program(s) name(s).


By clicking “Enroll”, the reports for the applicant will run and the applicant will be assigned the appropriate railroad program training and testing.



<input checked="" type="checkbox"/> Programs	Enterprise	Status
<input checked="" type="checkbox"/> Central Florida Rail Corridor Screening Program	Florida Department Of Transportation	
<input checked="" type="checkbox"/> Kansas City Terminal Railway Screening Program	Kansas City Terminal Railway	

Cancel Enroll

Confirm

 Are you sure you want to enroll in the program?

Yes No

Step 7: View Reports

The Report Status column for each applicant shows the current status of the applicant's background reports. If the report is complete, the status will say "COMPLETED." If a report is still pending, the status will say "IN PROGRESS." If the report has any issues such as missing information, the status will be presented as "REJECTED."

Report Status
Completed
In Progress
In Progress
In Progress

Name	Status	Last Update	Report ID
Carithers, Beatrice View			
National Criminal Database Search (NCDC)	IN PROGRESS	2016-09-23	1382773
Criminal Report, Extended Nationwide Multi-County	IN PROGRESS	2016-09-23	1382774
OFAC	COMPLETED	2016-09-23	

To view an applicant's report, you will select the box next to the individual whose report you wish to view.

Once you select your applicant, click on the "View Reports" button to the left of your screen. To view the report, select the View button in the new pop-up window and the report details will appear in the window.

The screenshot shows a software interface with two main panes. The left pane, titled "View Reports", contains a table with columns for Name, Status, Last Update, and Report ID. The right pane displays detailed information for a specific report (ID 225842) for applicant "kim g smith".

Name	Status	Last Update	Report ID
smith, kim			
National Criminal Database Search (NCDC)	COMPLETED	2016-09-09	25360039
Criminal Report, Extended Nationwide Multi-County	COMPLETED	2016-09-09	25360039
OFAC	COMPLETED	2016-09-09	

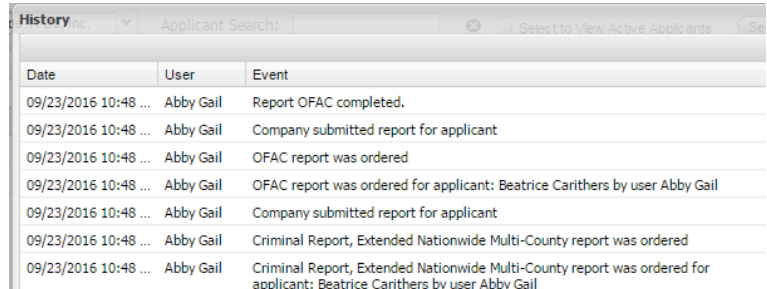
Applicant Name : kim g smith		Report Status : Complete	
Applicant SSN :	XXX-XX-6565	Report Submitted :	09/09/2016
Applicant DOB :	10/10/1993	Report Completed :	09/09/2016
Applicant Address :	5445 west lane suwanee, GA, 30189		
Requested By :	sachu kumar		

Reports Order Summary

Order	Report Name	Status	Action
1	Criminal Search	Complete	
1	Criminal Report, Extended Nationwide Multi-County	Complete	Needs Review
2	National Criminal Database Search (NCDC)	Complete	Needs Review
3	Other	Complete	Clear

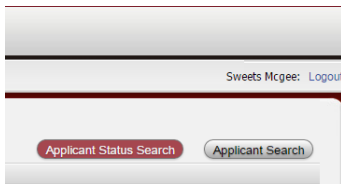
Step 8: Applicant History

To view the history of an applicant, click the “History” button. This will display every action that has been completed on the applicant.



Date	User	Event
09/23/2016 10:48 ...	Abby Gail	Report OFAC completed.
09/23/2016 10:48 ...	Abby Gail	Company submitted report for applicant
09/23/2016 10:48 ...	Abby Gail	OFAC report was ordered
09/23/2016 10:48 ...	Abby Gail	OFAC report was ordered for applicant: Beatrice Carithers by user Abby Gail
09/23/2016 10:48 ...	Abby Gail	Company submitted report for applicant
09/23/2016 10:48 ...	Abby Gail	Criminal Report, Extended Nationwide Multi-County report was ordered
09/23/2016 10:48 ...	Abby Gail	Criminal Report, Extended Nationwide Multi-County report was ordered for applicant: Beatrice Carithers by user Abby Gail

Step 9: Applicant Status Search

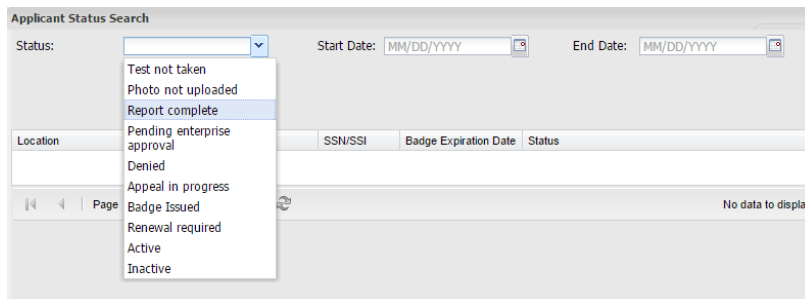


You have the ability search or filter your applicants based on their current statuses.

To perform this type of search, click the “Applicants” tab, followed by the “Applicant Search Status” button.

Next, choose the status that you would like to search from the drop-down menu.

All applicants that fit the chosen status will appear in a list, which can then be exported by clicking the “Export Results” button. You can also choose a date range to further refine your search.



Applicant Status Search

Status: Start Date: MM/DD/YYYY End Date: MM/DD/YYYY

- Test not taken
- Photo not uploaded
- Report complete
- Pending enterprise approval
- Denied
- Appeal in progress
- Badge Issued
- Renewal required
- Active
- Inactive

Location: SSN/SSI: Badge Expiration Date: Status:

Page: No data to display

Applicant Status Search

Status:

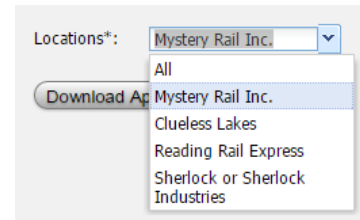
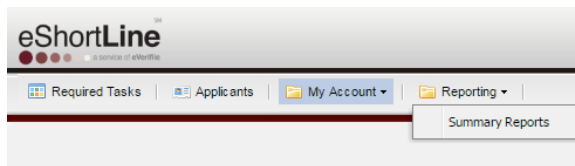
Location	Name	SSN/SSI	Badge Expiration Date	Status
Mystery Rail Inc.	Juliet C. O'Hara	xxx-xx-2314		Active, Need Photo, Report Under Review
Mystery Rail Inc.	Carlton A. Lassiter	xxx-xx-2369		Active, Test Not Taken, Need Photo
Mystery Rail Inc.	Phylcia Guster	xxx-xx-1896		Active, Test Not Taken, Need Photo, Report Under Review

Page 1 of 1 | Displaying 1 - 3 of 3

Step 11: Summary Report

The summary report gives a list of every applicant in your account and their current statuses in an Excel spreadsheet format. Access it by clicking the Reporting tab followed by the Summary Reports tab.

On the next screen, choose "All" or a specific location for which you want a summary report, then click the "Download Applicant Summary Report" button.

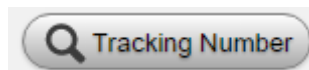


After the Report Generated box appears, click OK to begin the download. Open the file to view the summary report.

Company	Applicant	First Name	Last Name	SSN	DOB	Training D	Test Date	Created Date	Report Status	Report Re	Program Name	Program Status	Applicant I
Railroads	5968	Jessica	Chastain	*****9283	8/14/1987			5/17/2016	In Progress		Kansas City Terminal Railway Screening Program	In Progress	Active
Railroads	6343	Beatrice	Carithers	*****4855	4/18/1976			9/23/2016	Completed	Clear	Kansas City Terminal Railway Screening Program	In Progress	Active
Railroads	6343	Beatrice	Carithers	*****4855	4/18/1976			9/23/2016	Completed	Clear	Central Florida Rail Corridor Screening Program	In Progress	Active
Railroads	6344	Jacob	Williamso	*****8967	8/2/1989			9/23/2016	Completed	Clear	Kansas City Terminal Railway Screening Program	In Progress	Active
Railroads	6344	Jacob	Williamso	*****8967	8/2/1989			9/23/2016	Completed	Clear	Central Florida Rail Corridor Screening Program	In Progress	Active

The report can be sorted by first name, last name, company or any available status.

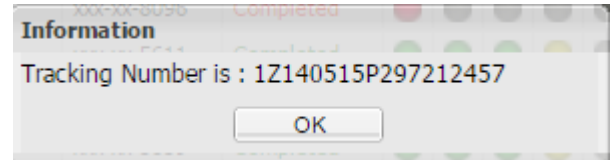
Step 11: UPS Tracking



Once an applicant's badge has been printed and shipped, you will receive

an email stating that a package has been shipped for your company.

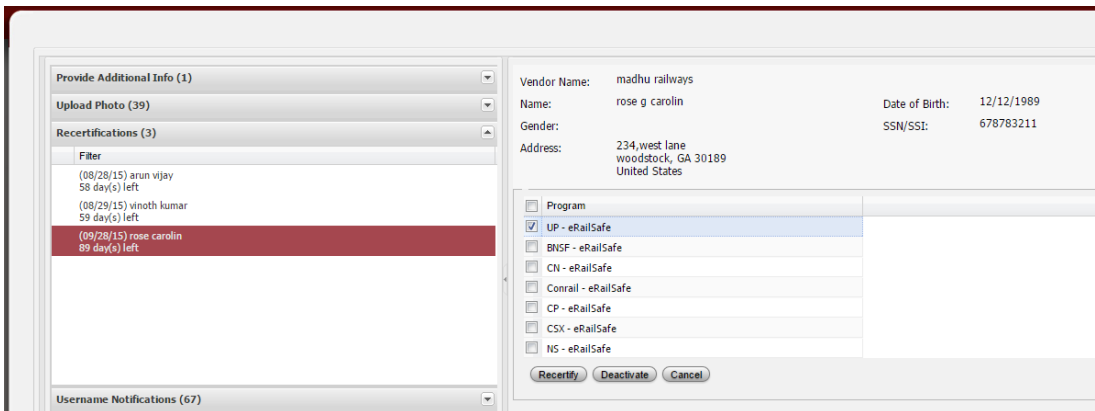
You can also obtain the tracking number of an applicant's badge by clicking the box next to the applicant's name, then click the Tracking button on the left side.



A pop-up box will appear displaying a tracking number. Copy that number and either paste it into your address bar or enter it on www.ups.com.

Step 12: Recertification

Once an applicant is up for recertification you will have a required action on the Required Tasks page. You will see a list of applicants that are 90 days out from having an expired badge.



To recertify an applicant, you will select the applicant you wish to recertify. The applicant's information will appear to the right of your selection. You will need to select the programs/ railroads desired in order to complete this action. Once selected, you will need to click on the "Recertify" button.

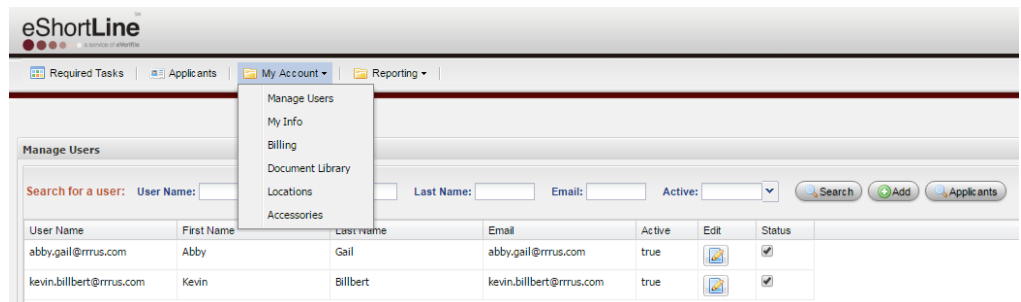
If an applicant is already inactive in your account and you need to recertify them, the Recertify button will be grayed out. To recertify the applicant, you must first make them active by clicking the checkbox next to “Active” in the applicant’s file and click Save. Then go back to the Recertifications tab and the Recertify button will be enabled.

You will also be able to deactivate or make an applicant inactive from this screen by clicking the Deactivate button.

My Account

Step 1: Managing Users

To begin managing users, select the “My Account” menu item and choose “Manage Users.” Once selected, the Manage Users window will appear.



*If you cannot see the add button, hold the <ctrl> button and use the (-) sign to zoom out of the application.

By managing users, you can accomplish the following tasks:

- Search for a user
- Enable or disable a user’s access
- Create users with separate roles allowing you to modify the access rights for your

users

The roles are listed below:

- **Vendor Administrator:** Full access to all locations and managing users including location administrators
- **Location Administrator:** Access to manage users for locations, initiate and view background checks
- **HQ Accounts Payable:** Access to view and pay invoices for all locations (if the account is set up for centralized)
- **Location Accounts Payable:** Access to view and pay invoices for all locations
- **HR User:** Access to initiate and view background checks for a specific location
- **HR Viewer:** Access to view background checks for a specific location
- **HR Initiator:** Access to only initiate background checks

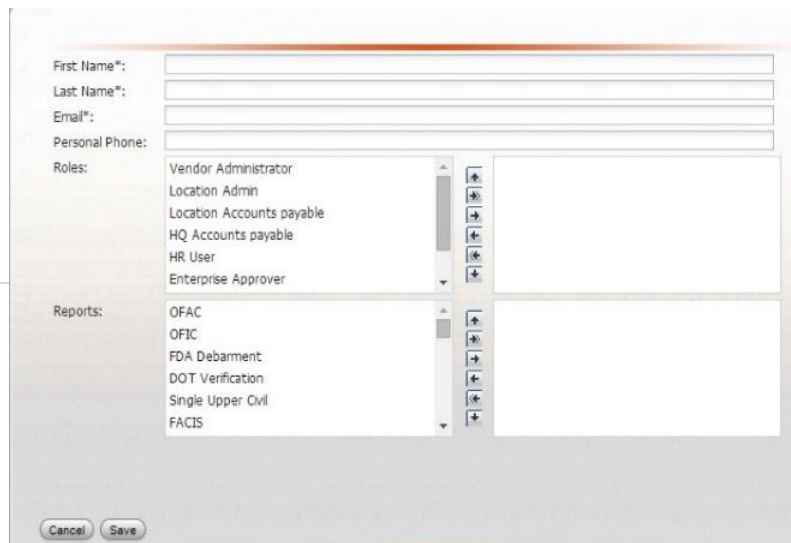
Step 2: User Info and Role Assignment

To add a user, select the “Add” menu item. After you click on “Add” you will be taken to the user role screen where you can add the user’s name, email and phone number.

Roles are defined by the type of activities you want the user to be able to perform. Some of the roles allow a user full access to add applicants, to run reports and view reports, and to manage your account. Other roles restrict access to editing information or just allowing the user to view a report.

Once you have added the user’s information you will choose a role by selecting the role and use the right arrow to add the role to the right hand screen.

Once a role has been



First Name*:

Last Name*:

Email*:

Personal Phone:

Roles:

Vendor Administrator	+
Location Admin	+
Location Accounts payable	+
HQ Accounts payable	+
HR User	+
Enterprise Approver	+

Reports:

OFAC	+
OFIC	+
FDA Debarment	+
DOT Verification	+
Single Upper Civil	+
FACIS	+

Cancel Save

defined you can restrict access to reports by selecting the report types and using the right arrow to place the description in the right hand screen. This will restrict access to only the reports you have selected for this role.

After you have entered the user's information, click the "Save" button. Once you have saved the user they will appear in the Manage Users screen. An email will be sent to the new user with their login information and instructions on how to create a password to access the system.

When logging in for the first time, users will be asked to choose security questions and to create your own password. Below is the password criteria:

- 8 character minimum
- Must have at least one (1) capital letter
- Must have at least one (1) lower case letter
- Must have at least one (1) symbol (preferably one of the following: @, #, \$, !, *)

In the Manage Users screen you may see important notifications available to you. These notifications will provide the status of all users as well as indicating whether their access is enabled.

You can edit or disable a user's access a user from the Manage Users screen. To edit a user, click the "Edit" button and the user's information screen will appear. To disable a user's access, simply uncheck the box under the Status

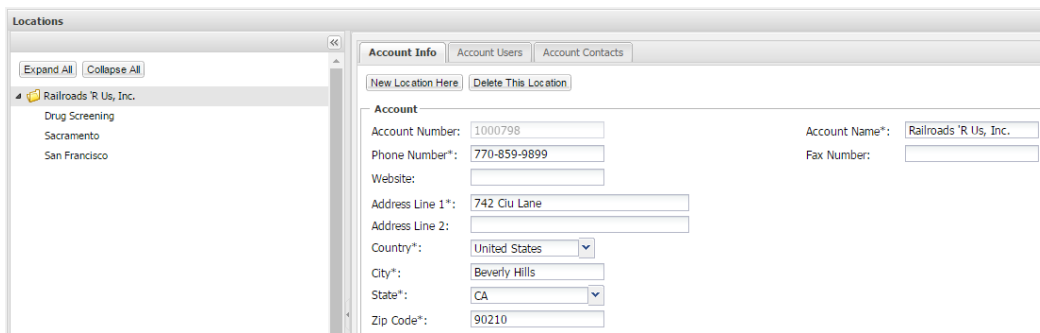
column of that particular user.

Assign a User to Multiple Accounts

If there is a user who needs access to multiple accounts, please contact Customer Support at 855-383-7434 or send an email to support@everifile.com.

Step 3: Adding a Location/Location-Specific User

When your account setup process is completed you will be assigned a main location. If you wish to add a new location to your account you will select Locations on the My Account drop down. A new screen will appear on the right-hand side of your screen. To add a new location you will click the “New Location Here” button. This will allow you to enter your location information and where you would like any future badges shipped to.



*To add a general location to your account you will want to make sure you have your company name highlighted on the left side of the screen and then select the “New Location Here” button. If you wish to add a sub location to an already existing location you will want to highlight that location and then select “New Location Here.”

You can also add a user to a specific location by adding a location, then clicking the Location Users tab and adding a user.

Shipping Contact

You can have badges and accessories sent to different people based on location by going to the My Account tab then clicking Locations. Scroll down to the bottom of the Location Info section and enter in the name of the person who should

be receiving packages from eShortLine for that location. Then click the Save button.

Location Info	Location Users	Location Contacts
State*:	MA	
Zip Code*:	02123	
Shipping Address		
<input checked="" type="checkbox"/> Shipping address same as account address?		
Address Line 1*:	426 Manor Way	
Address Line 2:		
Country*:	United States	
City*:	Boston	
State*:	MA	
Zip Code*:	02123	
Shipping Contact		
First Name*:	John	Last Name*: Watson
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Billing

Step 1: View Invoice

To access your organization's invoice, click on "My Account" menu item and

View Invoices	Account Owner Info	Update Payment	Admin Person
The following invoices are available for viewing			
Statement #	Statement Date	Due Date	
651981771	2015-11-05	2015-11-05	

choose "View Invoice."

		INVOICE eVERIFILE.COM Inc. 900 Circle 75 Parkway, Suite 1550 Atlanta, GA 30339, USA	
Invoice For Railroads 'R Us, Inc. 742 Clu Lane Beverly Hills, CA, 90210 US	Due Date 11/5/2015 Invoice Date 11/5/2015 Payment Term Due Upon Receipt Invoice ID 651981771 Account Number 5e9f75e7-4537-4e96-8c0c-28a977b6830-EVI-1000798		
<small>For questions regarding your invoice, please contact customer support at 855-383-7434 or via email at support@everifile.com.</small>			
Charge Summary			
Program	New Activity	Qty	Total
	One time fee	1	99.00

If you click on the row of the invoice, the actual invoice will appear in a window and you will be able to print the invoice.

Step 2: Updating Payment Information

To access your organization's payment information, click on "My Account" menu item and choose "Update Payment."

View Invoices | Billing Contact | **Update Payment**

Card Holder Name*:

VISA
 MasterCard
 American Express
 Discover
 Security Code*:

Card Number*:

Expiration Date*: Month Year

Billing Address

Address Line 1*:

Address Line 2*:

Country*:

City*:

State:

Postal Code:

Applicants

Step 1: Logging In

Advise your applicants to go to <http://shortline.everifile.com/renovo/> and to enter their login credentials.

Their initial login credentials will fit one of the two following sequences:

Sequence # 3:

Example: Adam Smith born on July 23, 1975

Username: Smith0723 Password: a1975

In this sequence, the username consists of the applicant's full last name + two-digit birth month (MM) + two-digit birth date (DD).

The temporary password will be the first initial of the applicant's first name, lower case, followed by the applicant's full birth year.

Sequence # 4:

Example: Adam Smith born on July 23, 1975

Username: Smith07231 Password: a1975

In this sequence, the username consists of your full last name + two-digit birth month (MM) + two-digit birth date (DD), and an additional digit.

Your temporary password will be the first initial of your first name, lower case, followed by your full birth year.

For any sequence, once the applicant is logged into the system, the applicant will be prompted to set their own security questions as well as create their own permanent password.

Below is the password criteria:

- 8 character minimum
- Must have at least one (1) capital letter
- Must have at least one (1) lower case letter
- Must have at least one (1) symbol (preferably one of the following: @, #, \$, %,!, *)

After the applicant has completed this step, they will be asked to verify their personal information entered by you. If all information is correct, the applicant can move onto taking your training and testing.

The applicant will be the only one with access to this information. If the applicant needs to reset their password, they can select the “Forgot Password” link on the main login page and answer their chosen security questions.

Retrieve Username/Reset Password/Restore Training for an Applicant

If an applicant forgets their username or password (temporary or permanent), you can retrieve the username and reset their password.

To do so, please follow the below:

1. Once logged into your account, go to the My Account tab
2. Click on Manage Users*
3. Click on the Applicants button on the right. If you do not see this button, please click the double arrows (>>) and choose the Applicants button
4. Enter the applicant’s first or last name in the appropriate field, then click the Search button. This will give you the applicant’s username
5. Click the Reset Password icon
6. Enter any password, there is no set criteria
7. Give that password to the applicant
8. If an applicant completes their training, but needs to have it restored in order to complete the testing, simply click on the icon under the Restore Training column

Manage Users

Search for a user: User Name: First Name: Last Name: Email: Active:

User Name	First Name	Last Name	Email	Active	Reset Password	Restore Training
Mae0315	Anna	Mae		true		
Morris0622	Rebecca	Morris		true		

*If you have multiple locations, you will need to choose the Locations button from the My Account tab. Next choose the location the applicant is a part of, then click on the Account Users tab.

Locations

Expand All Collapse All

- Railroads R Us, Inc.
 - Railroads Anonymous
 - Skip-Track

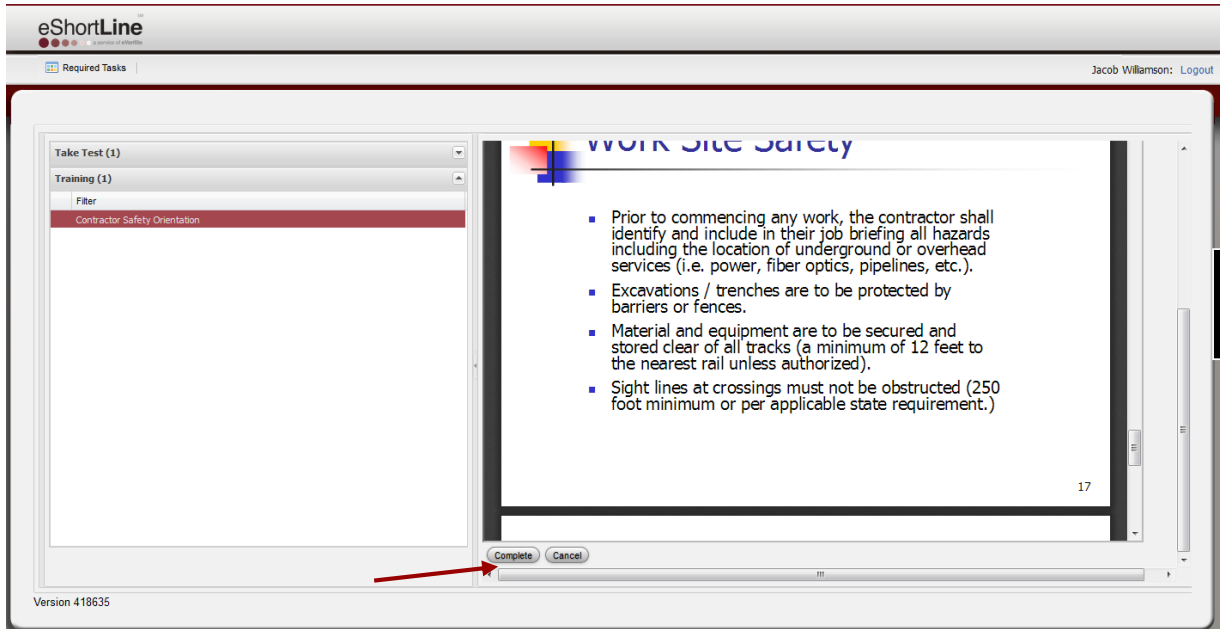
Account Info **Account Users** Account Contacts

Search for a user: User Name: First Name: Last Name: Email: Active:

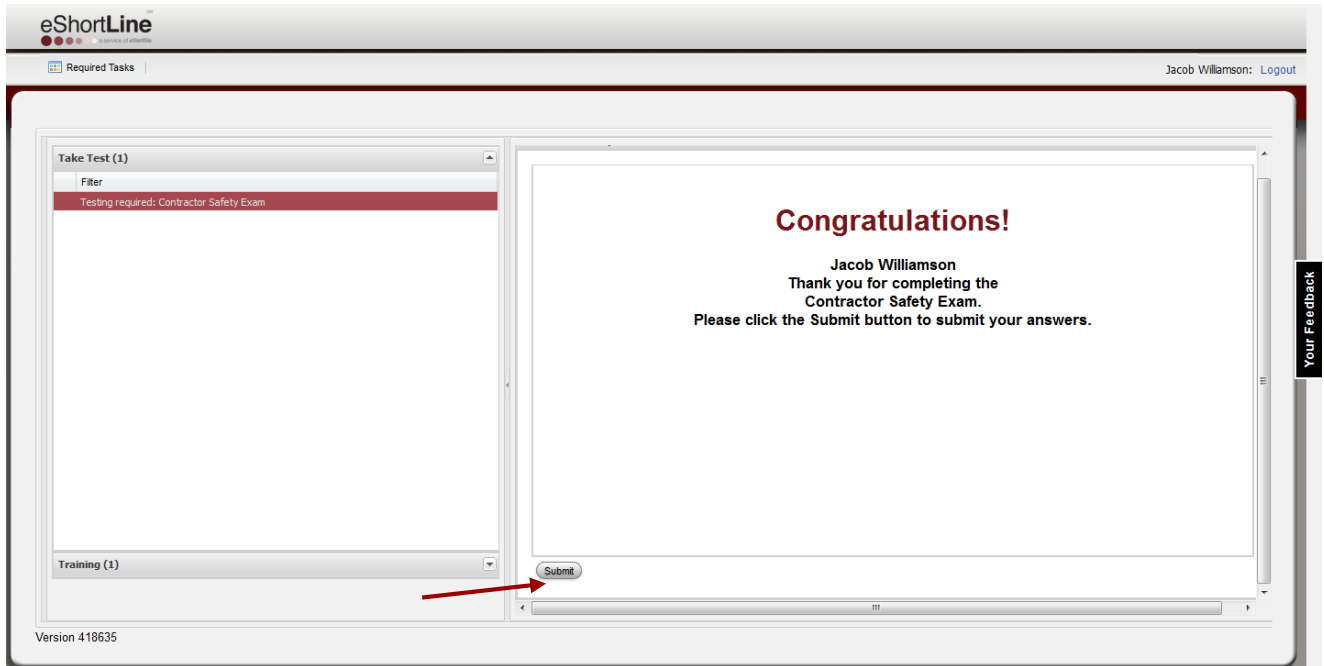
User Name	First Name	Last Name	Email	Active	Reset Password	Restore Training
Berry0325	Landon	Berry		true		
Abdington0711	Kyle	Abdington		true		

Step 2: Training and Testing

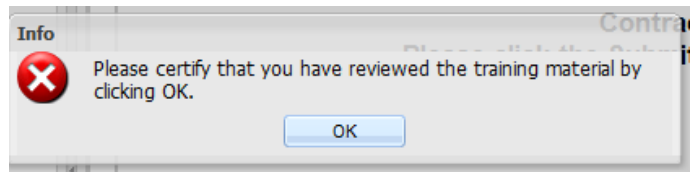
When an applicant logs in, they will have a Required Tasks screen containing the required testing and training. To complete each training, the applicant must read through all the reading and click the "Complete" button at the bottom of the screen.



To complete testing, the applicant must answer each question and click the “Finish” button at the bottom of the Congratulations! screen. As a task is completed, it will be removed from the applicant’s Required Tasks screen.

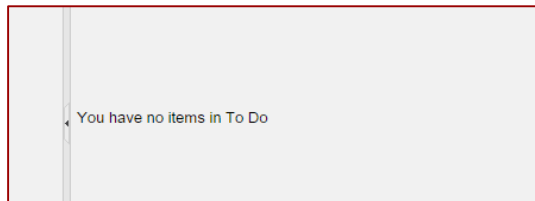


If an applicant has completed all of the testing, but has not clicked the “Complete” button at the end of the training, they will receive the below pop-up box:



Once they click “OK”, their training will automatically be marked as completed.

An applicant has completed all required training and testing when their Required Tasks screen is blank and the right side of the screen reads “You have no items in To Do”.



SSN Discrepancy

An SSN discrepancy occurs when an applicant's address history/SSN trace does not match up with what was entered into the system for that applicant.

If this occurs, you will receive an email like the below stating that your applicant has an SSN discrepancy:



Attention Valued Client

This is a courtesy notification to advise you that the background report for your candidate/employee(s): Adam Smith

Has come back with a possible SSN discrepancy. A SSN discrepancy can result from several matters including: the SSN trace data not matching the provided name, the date of issuance preceding the candidate's/employee's date of birth, the SSN is associated with the Death Master File (Social Security Death Index/SSDI) Index, no history associated with the SSN, etc. This does not mean the SSN is not valid for your candidate/employee(s).

Please verify the applicant's legal name and SSN. If the information is accurate, please upload the front and back of the applicant's social security card and government identification card in the appeals folder in the applicants file.

Upload Steps

1. Click on the box next to the applicants name
2. Click the document button
3. Click on appeals
4. Click on the + sign to add the document

If the information is inaccurate, please update the employee's file to reflect the correct information.

Once this discrepancy is resolved, your candidate/employee(s) can move forward with the certification process. If we are unable to resolve, it will be passed to the appropriate railroad(s) for discrepancy review.

Please provide the phone numbers for the candidate/employee(s) above so that we may contact them directly to obtain more information.

*If these candidates are already employed with your company you may upload that information.

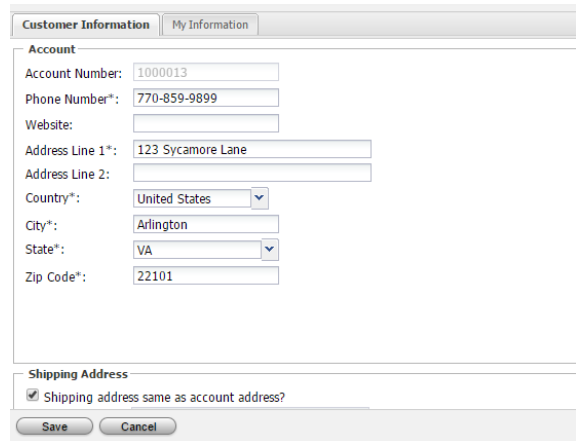
Below are the most common reasons for an SSN discrepancy:

Reason for SSN Discrepancy	Examples	How to Fix SSN Discrepancy
Applicant's legal first name was not entered	Entering "Dan" instead of "Daniel"	Update applicant's First Name*
Multiple last names appear	<ul style="list-style-type: none"> • Women who have been married • Applicants who have two last names 	<ul style="list-style-type: none"> • Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver's license/US passport) to Appeals folder through Documents button • Update applicant's last name to contain all last names *
Multiple first names appear	Applicants who often go by their middle names	Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver's license/US passport) to Appeals folder through Documents button
Different person's name/address history appear	Applicant's name is Adam Smith but Susan Roberts is the only name that appears on the address history or appears several times	<ul style="list-style-type: none"> • Ensure you have entered correct SSN for applicant by comparing it with the applicant's Social Security card. If not, you must update the SSN for the applicant* • Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver's license/US passport) to Appeals folder through Documents button
No Address History	<ul style="list-style-type: none"> • Applicant is 25 years old or younger • Applicant has held an SSN for less than 7 years 	Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver's license/US passport) to Appeals folder through Documents button

PLEASE NOTE: Anything with an (*) means that new background reports will be run based on the new information entered and your company will be charged.

My Info

The My Info tab is where you will find your company's or your location's contact information as well as your own contact information as a user of the account. The Customer Information tab shows the company or location address, phone number and shipping address, all of which can be edited.



Customer Information | My Information

Account

Account Number: 1000013

Phone Number*: 770-859-9899

Website:

Address Line 1*: 123 Sycamore Lane

Address Line 2:

Country*: United States

City*: Arlington

State*: VA

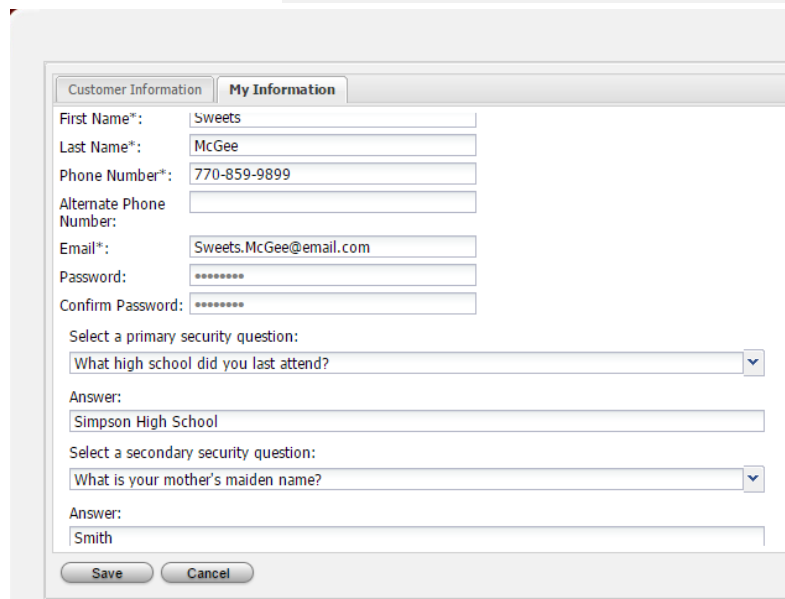
Zip Code*: 22101

Shipping Address

Shipping address same as account address?

Save Cancel

The My Information tab shows your contact information as a user for the account. Here you can update your email address, password as well as security questions and answers.



Customer Information | **My Information**

First Name*: Sweets

Last Name*: McGee

Phone Number*: 770-859-9899

Alternate Phone Number:

Email*: Sweets.McGee@email.com

Password: *****

Confirm Password: *****

Select a primary security question:

What high school did you last attend?

Answer: Simpson High School

Select a secondary security question:

What is your mother's maiden name?

Answer: Smith

Save Cancel

Document Library

Step 1: Accessing Your Library

One of the new features in the new eShortLine platform is the capability to upload and save compliance documents required for your users and applicants into your document library. This feature is similar to DropBox, Google Drive, or any cloud-based system, where you can upload important documents to a secure online location.

Storage space is unlimited, so using this feature will allow you to access important information at the click of a mouse.

To access your organization's document storage, click the "My Account" menu item and choose "Document Library."

Once you enter the library you can view any documents you have previously uploaded for your company

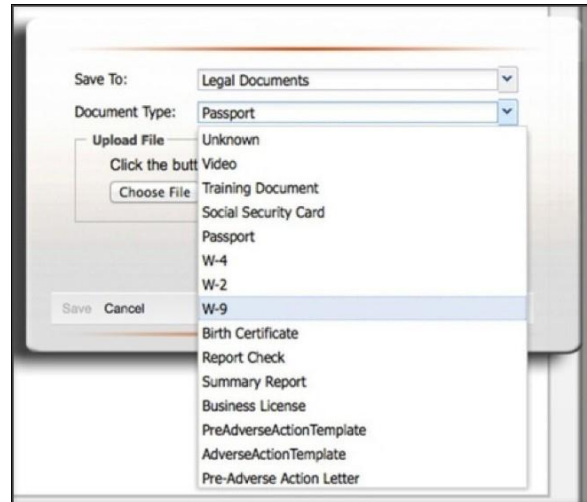
You can also add documents to your library such as the Service Agreement, Consent Forms or any other documents your organization might need by clicking the "Add Document" button. Selecting the "Company Documents" folder will expand your selection into the individual folders.



Step 2: Uploading Your Documents

To upload a document, click the “Add Document” button at the top of the library menu. This will bring up the upload screen where you can choose what type of document you are uploading.

You want to choose the system folder where you want to store the document.



The Legal Documents selection is available for any needed legal documents such as report checks, W-9 forms, consent forms, etc.

The Training Documents folder selection is available for any training documentation, videos, tests results, etc.

They My Documents area is for all the generic documentation you upload for your organization.

Once you have chosen the folder, select the document type from the dropdown list.

To upload a document you must first select the document you wish to upload by clicking the “Choose File” button. Browse your local computer for the file you wish to open and click the “Open” button in your file browser.

Once you have selected the file, the filename will appear next to the “Choose File” button. If your selection is correct, click on the “Save” button and your file will be uploaded to the system.

When the upload is complete you will see the document in the folder you selected for the document storage.

Step 3: Viewing and Printing Your Documents

To view a document, select the folder where the document is stored and select the document name you wish to view. Different document types are viewed in different ways. Microsoft Word documents will be downloaded to your local computer for viewing. Graphic files (png, jpg, gif, bmp, videos, reports (not in document format), and text files will be viewable in the document window to the right of your library.

To print a document from the system, right click your mouse in the viewing pane and select "Print."

If you wish to download a copy of the document, right click in the viewing pane and select "Save As" and save the document to your local computer.

Step 4: Deleting Your Documentation

On occasion, you may have a need to remove a document from our system. You can do this by accessing your library to find the document you wish to remove.

To permanently delete the document, use the delete button to the right of your document. You will not be prompted to confirm the delete, so use this feature with caution. eShortLine may not be able to retrieve any deleted documents from the system.

eShortLine will not remove a document from your system once uploaded. You have full access to manage your documentation for the purposes you select.

