

Available December 1st, 2021



AEGIS
SCREENING MANAGEMENT SOFTWARE

CONSOLIDATED ORDER FORM

The new order form in AEGIS allows a user to order a Background Screen and/or Managed Services on one form. This will eventually replace the separate order forms we have now.

The first page in the form will present options and inputs based on selections made and client options already defined.



BIB

BACKGROUND INVESTIGATION BUREAU

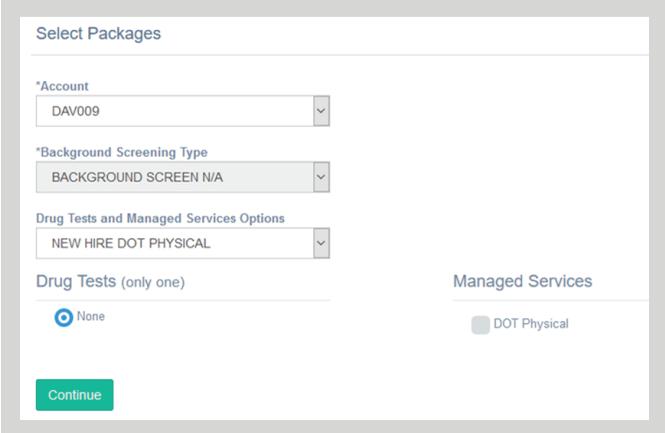
General Note:

When a section is completed (i.e., clicked Continue), that section will collapse, but still be accessible. You can go back and click on the header for any previous step and make changes. IF changes are made, continue to go through the data entry form and complete each step to ensure accuracy.

▶ Select Packages

The Account selection will determine if you are able to select a Background Screen package and a Managed Services package. Some accounts are not setup for both.

If an account doesn't have packages in one, then that select box will be disabled / grayed out.



Example of client with only Managed Services packages:

▶ Managed Services, Applicant Express and Secure Volunteer

Selecting a Managed Services option will disable Applicant Express for the order because Applicant Express cannot yet handle Managed Service products and provider selection. Secure Volunteer clients can designate their order as SV even when ordering managed services, but this can only be done in AEGIS.

Search for Previous Orders

- ▶ After package options are selected, you will be able to see if there were previous orders for the subject. The search can be done by name, SSN or email.



► Search Results

Results from the search will populate with a few details about the subject such as address, date of birth and their last order date. More details on each order can be viewed with the "Details" button. If you have Applicant Express and you are not entering a Secure Volunteer order, you may click the button to start the Applicant

Name	Date of Birth	Last Order Date	Order Type	Action
JANE DOE (**-**-4789) 127059 12345 MY ST HUNTERSVILLE, NC 28078	03/01/1979	07/21/2021	Managed Services	Start A Blank Order Details Send via Applicant Express Begin Manual Entry Order
JANE DOE (**-**-4789) 2035305 12345 MY ST HUNTERSVILLE, NC 28078	03/01/1979	01/21/2016	Background Screen	Details Send via Applicant Express Begin Manual Entry Order
JOHN DOE (**-**-1111) 127057 123 HAPPY ST APT SPRINGFIELD, AK 99501	01/01/1987	07/21/2021	Managed Services	Details Send via Applicant Express Begin Manual Entry Order

If a previous order does not exist for the subject, click "Start A Blank Order" for an empty form. It will default to Applicant Express if enabled, but you may also switch to a Manual Entry form via the tab.

Enter / Verify Subject Information

Enter / Verify subject Information

[Applicant Express](#) [Manual Entry](#)

Please fill out the fields below to generate credentials for the subject to complete their background check using Applicant Express.

*First Name:

*Last Name:

*Email:

Requestor:
 Send Copy to Requestor

*Method of Communication:
 Choose an Option
 Email From Applicant Express
 Email From My Program
 Print

[Submit](#) [Clear Form](#)



If an Existing Order is used, then the form is prepopulated with that existing data. If there are changes, the data can be changed for the new order. The previous order will not be affected.

Enter / Verify subject Information

Applicant Express Manual Entry

Please complete all required fields to begin this order.

*First Name: JANE Middle: No Middle: Last Name: DOE Race: SELECT ONE *Sex: Male Female

*Date of Birth: 03/01/1979 *SSN: 123-45-6789 *Email Address: AHINSON@BIB.COM Phone Number: XXX-XXX-XXXX

*Street Address: 12345 MY ST Apt/Suite: *City: HUNTERSVILLE *State: NC - NORTH CAROLINA *Zip: 28078

Special Instructions/Comments:

If a Managed Services package was selected, additional options will be presented, this includes the provider selection (Choose Providers) button.

Additional Data for Managed Services

Employee Position Employee ID Employee Notes

Location Location Code

Expected Clinic Visit Date Reason for Services

mm/dd/yyyy Pre-Employment

Select a provider location **Choose Providers** Zip Code 28078 If a testing facility is needed in a different zip code, please enter here.

Verify Order

▶ Choose a Provider pop-up screen

Choose a Provider

Select providers for individual services

DOT Drug Screen

REQUEST ALTERNATE PROVIDER
Facilities listed above are not within a 30 miles radius of donor's location.

Atrium Urgent Care - Morehead (Mon - Sun 8:00am - 8:00pm)
1426 East Morehead St
Charlotte, NC
Distance from zip provided: 13.1 miles

Novant Health Urgent Care (M-F 7:30am-7:30pm, Sat 8am-6pm, Sun)

DOT Physical

REQUEST ALTERNATE PROVIDER
Facilities listed above are not within a 30 miles radius of donor's location.

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▶ **New Middle Name Requirement:**

One addition to note on the Manual entry form is the requirement of either the Middle name or the checkbox to acknowledge that no middle name was provided. Hovering your mouse on the Help/Question Mark icon will help explain the checkbox.

A screenshot of a manual entry form. The form has fields for *First Name (JANE), Middle (empty), Last Name (DOE), *Date of Birth (02/01/1979), *SSN (123 45 6789), and *Email Address (ahinson@bib.com). A tooltip points to a checkbox in the Middle name field, containing the text: "Please check here if subject does not have a middle name is or it is unavailable." There is also a question mark icon next to the checkbox.

The Verify Information pop-up shows a condensed view of the data and options selected.

A "Verify Information" pop-up window showing a condensed view of the subject's data. The data includes: Name: JANE DOE, DOB: 03/01/1979, Account: BIB005, SSN: 123-45-6789, Search: STANDARD, Email: ahinson@bib.com, Reference: STANDARD, Phone: 704-439-3900, Managed Services: DOT Physical, Address: 12345 MY ST, HUNTERSVILLE, NC 28078. A "Confirm and Continue" button is at the bottom right.

The Search Options and the Review Order pages are both mostly unchanged. They are only shown if doing a background package and not necessary for a Managed Services only order.

Two screenshots side-by-side. The left one is "Search Options for DOE, JANE" and the right one is "Review Order for DOE, JANE".

Search Options for DOE, JANE

Search Types

Please complete the following form for the subject. Required fields are denoted with an asterisk (*). All domestic phone and fax numbers should be in XXX-XXX-XXXX.

Criminal and Civil Check

We will automatically process Criminal Checks based upon the applicant's information provided. Requires accurate Address and Name.

Address History Trace

We will process an Address History Trace Report for this subject. Requires accurate Social Security Number and Name.

Terms of Agreement

I, CLIENT SERVICES, on behalf of DEMO ACCOUNT, agree to and have completed the following:

- If this search falls under the guidelines of the Fair Credit Reporting Act (FCRA), I pledge that I have done the following:
 - I have had the subject read and sign the Background Authorization form. I will retain this form on the add make available this form to the provider at all times.
 - The researcher's results are based on a combination of the following: Name, SSN, Date of Birth, and Address. Positive ID can only be achieved by a fingerprint.
 - Identifiers such as Date of Birth, SSN, and Address must not be used to discriminate against subject.
 - All individuals, corporations, or other entities that will use this subject's information agree to follow the guidelines of the Fair Credit Reporting Act.

I Agree to the Terms

Review Order for DOE, JANE

Review

Please verify that all the entered information is correct before submitting your search request. Use the edit button below to correct any mistakes. On

Subject Info

Full Name:	Race / Sex:	Date of Birth:	SSN:	Email:	Phone:
DOE, JANE	UNKNOWN / F	03/01/1979	123-45-6789	AHINSON@BIB.COM	704-439-3900

Full Address:
12345 MY ST, HUNTERSVILLE, NC 28078

Special Instructions/Comments: Send Subject Copy of Report: NO

Aliases:

Searches

Please review the following search types and their submitted information.

Criminals/Civils

1)	Type:	Area:	State:	County/Country:	Order Method:
	Criminal Record	STATEWIDE	NC	STATEWIDE	AUTO

