



REXUS
Professional Background Screening

REXUS Portal User Guide

REXUS PORTAL USER GUIDE



Contents

Before You Begin.....	1
Responsive Design.....	1
ONline Help.....	1
Context Sensitive Help.....	1
Portal Login.....	2
Field Descriptions.....	2
Create Account.....	2
Password Setup (First Time Users).....	2
Logging in.....	2
Reset password.....	3
Field Descriptions.....	3
Change Password.....	4
Reset Password.....	4
Review Existing.....	5
Field Descriptions.....	5
Search by Applicant Name.....	6
Access Applicant Details.....	7
Edit Applicant Info.....	8
Documents.....	9
Request Additional Searches.....	10
Search Status.....	11
View In Progress Report/View Completed Report.....	12
Submit New Applicant.....	13
Field Descriptions.....	13
Submit New Applicant and Search Request.....	15



BEFORE YOU BEGIN

As part of your onboarding process, you should have already received the *Getting Started Guide*, introducing you to Rexus and the services we offer. Once you have received notification that your portal user account is set up, you'll receive an email with a link to the portal.

This user guide walks you through your initial setup as well as how to add applicant search requests, check search status, and download reports.

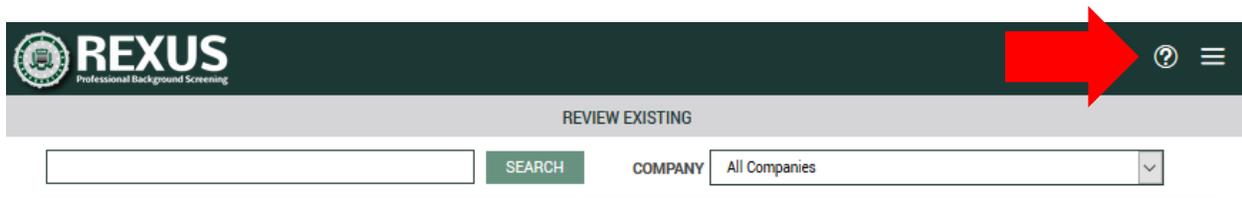
RESPONSIVE DESIGN

The Rexus portal uses responsive design so that it can be used on both personal computers and mobile devices; the display adapts based on screen size. Which means, as PC users resize the browser, items on the screen will move and/or resize.

The images included in this guide are based on the desktop user interface.

ONLINE HELP

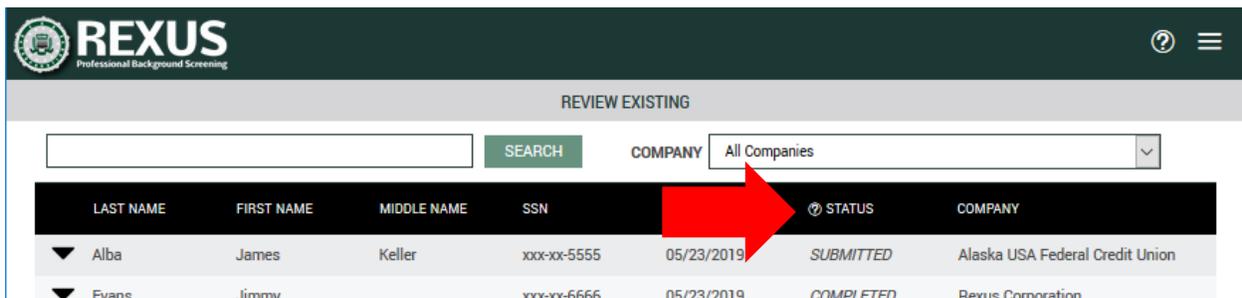
Once you are logged into the portal, you can access this user guide by clicking the help icon and selecting User Guide.



You can also access descriptions of the different searches and statuses from the help menu.

CONTEXT SENSITIVE HELP

Some sections of this user guide are available directly from the screen where the information is relevant. For example, on the Review Existing screen, click the help button next to Status to access a list of statuses and their descriptions.





PORTAL LOGIN

REXUS Professional Background Screening

SECURE ACCESS CLIENT PORTAL

USERNAME:

PASSWORD:

Login

[Need password assistance?](#)
[Need to create an account?](#)

FIELD DESCRIPTIONS

Field	Description
USERNAME	Email address registered with Rexus for portal access.
PASSWORD	User-selected password. This field is case sensitive. <ul style="list-style-type: none">• Passwords must be at least 15 characters and contain at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 symbol.• New passwords cannot be one of the last 10 passwords you used.

CREATE ACCOUNT

Clicking **Need to create an account?** takes you to the New Account Request Form on rexus.com where you can request someone from Rexus contact you to discuss setting up an account.

PASSWORD SETUP (FIRST TIME USERS)

New portal users will receive a Setup Password email. Click the included link and follow the instructions to set up a password. Refer to the "[Reset Password](#)" procedure.

LOGGING IN

NOTE: Users will not be allowed to access the portal without an active Rexus contract.

1. Type your email in the USERNAME field and press **Tab**.
2. Type your Rexus portal password in the PASSWORD field and press **Enter** or click **Login**.
RESULT: You are taken to the [REVIEW EXISTING](#) screen.



RESET PASSWORD

There are two ways to access the reset password screen.

- On the login page, click **Need password assistance?**

REXUS Professional Background Screening

RESET PASSWORD

NEW PASSWORD:

RETYPE NEW PASSWORD:

SUBMIT

PASSWORD REQUIREMENTS:

- Passwords must contain at least **1 upper case letter, 1 lower case letter, 1 number, 1 symbol, and be at least 15 characters long.**
- New passwords cannot be one of the last 10 passwords used on the account.
- For security purposes all account passwords must be changed every 90 days. You will be prompted to change your password prior to expiration.

- After logging in, select **Reset Password** on the menu.

REXUS Professional Background Screening

RESET PASSWORD

CURRENT PASSWORD:

NEW PASSWORD:

RETYPE NEW PASSWORD:

SUBMIT

PASSWORD REQUIREMENTS:

- Passwords must contain at least **1 upper case letter, 1 lower case letter, 1 number, 1 symbol, and be at least 15 characters long.**
- New passwords cannot be one of the last 10 passwords used on the account.
- For security purposes all account passwords must be changed every 90 days. You will be prompted to change your password prior to expiration.

FIELD DESCRIPTIONS

Field	Description
CURRENT PASSWORD	Current Rexus Portal password. This field is case sensitive.
NEW PASSWORD	New, user-selected password. This field is case sensitive.
RETYPE NEW PASSWORD	Same value as used in NEW PASSWORD field. This field is case sensitive.



CHANGE PASSWORD

Use this process to change your password before it expires.

NOTE: You are required to change passwords every 90 days. If your password expires (either from failure to change it or inactivity), follow the “Reset Password” procedure.

1. On the menu, click **CHANGE PASSWORD**.
2. Type your current password in the CURRENT PASSWORD field and press **Tab**.
3. Type your new password in the NEW PASSWORD field and press **Tab**.
4. Retype your new password in the RETYPE NEW PASSWORD field and press **Enter** or click **SUBMIT**.
RESULT: You are taken to the [REVIEW EXISTING](#) screen.

RESET PASSWORD

Use this procedure when you cannot remember your password or when your password has expired.

1. On the login page, enter your user name.
2. Click **Need password assistance?**
RESULT: You will receive an email from Rexus compliance with a link to the password reset page.
3. Click the link in the email.
4. Type your new password in the NEW PASSWORD field and press **Tab**.
5. Retype your new password in the RETYPE NEW PASSWORD field and press **Enter** or click **SUBMIT**.
RESULT: You are taken to the [REVIEW EXISTING](#) screen.



REVIEW EXISTING

LAST NAME	FIRST NAME	MIDDLE NAME	SSN	REQUEST DATE	STATUS	COMPANY
Alba	James	Keller	xxx-xx-5555	05/23/2019	SUBMITTED	Alaska USA Federal Credit Union
Evans	Jimmy		xxx-xx-6666	05/23/2019	COMPLETED	Rexus Corporation
Grajeda	Kelly		xxx-xx-4444	05/23/2019	INFO NEEDED	Rexus Corporation
Kelly	Wesley		xxx-xx-3333	05/23/2019	INFO NEEDED	Alaska USA Federal Credit Union
Osborne	Joseph	P	xxx-xx-xxxx	05/23/2019	RESTORING	Alaska USA Federal Credit Union
Vladimirovna	Troy		xxx-xx-7777	05/23/2019	PROCESSING	Rexus Corporation
Wilson	Charly	Q	xxx-xx-xxxx	05/23/2019	RESTORE	Alaska USA Federal Credit Union

FIELD DESCRIPTIONS

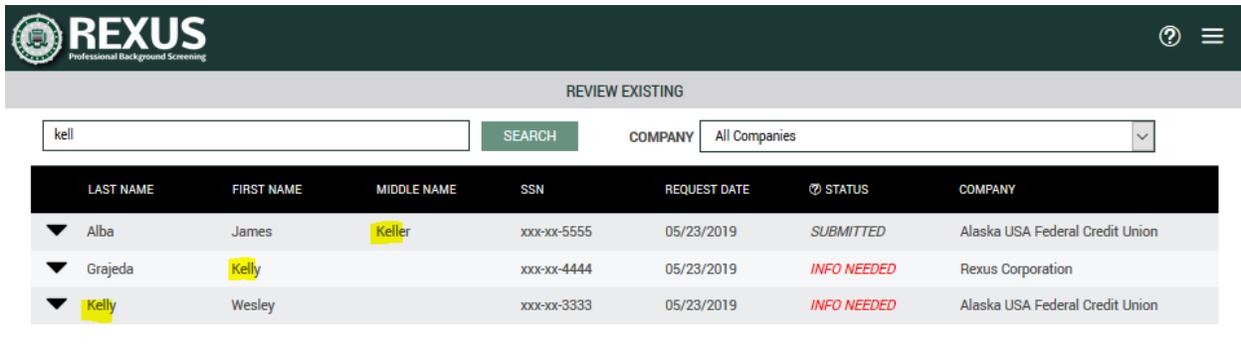
Field	Description
SEARCH	Search applicant records by first, middle, or last name or any combination of those.
COMPANY	Filter the list by a specific company for whom the applicant search request was entered. This field defaults to All Companies. NOTE: This field is only visible if you manage applicants for more than one company.
▼ ▲	Click to expand (or collapse) applicant details.
LAST NAME	Applicant's last, first, and middle name (if entered).
FIRST NAME	
MIDDLE NAME	
SSN	Last four digits of the applicant's SSN.
REQUEST DATE	Date the search requests for this applicant were submitted.



Field	Description
STATUS	<p>Status of the search requests/applicant record.</p> <ul style="list-style-type: none"> • Submitted: The search requests have been accepted but processing has not begun. • Info Needed: Required documentation is missing and must be provided before processing may begin. If you request additional searches before processing is complete that require additional candidate information, the status will change back to INFO NEEDED. • Processing: Searches are in progress. Access SEARCH STATUS to determine what is not yet complete. • Completed: All requested searches are complete. Once all searches are complete, no additional search requests can be added or edits made to the applicant record. If additional searches are needed, contact request@rexus.com. • Archived (RESTORE button shown): Record details are not currently available for viewing. (For security purposes, records more than 12 months old are archived.) • Restoring: Archived record is being restored for viewing.
COMPANY	Name of the company for which this applicant search was entered.

SEARCH BY APPLICANT NAME

The 20 most recently added requests are shown by default. Requests entered on the same date are shown in alphabetical order by last name. As you scroll, records are added in batches of 20, sorted in descending order by request date.

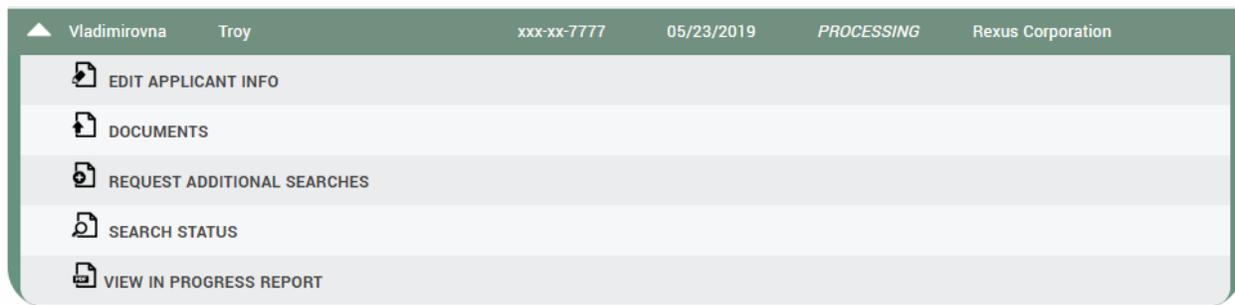


To search for a specific applicant record, enter a value in search field and click SEARCH to retrieve any records for which the first, last, or middle name matches the search string.

To return to the default results, clear the search field and click SEARCH again or refresh the web page.



ACCESS APPLICANT DETAILS



1. Click on the arrow next to an applicant record to expand the record.
RESULT: You are presented with a list of actions. Actions available depend on the status of the search requests. For example, VIEW IN PROGRESS REPORT is not visible until at least one search is complete. EDIT APPLICANT INFO is no longer visible once the record is in a COMPLETED status.
2. Click an action icon to expand the related details.

Action	Description
EDIT APPLICANT INFO	View, modify, or add to applicant information
DOCUMENTS	Upload or download documents
REQUEST ADDITIONAL SEARCHES	Add more searches to the request
SEARCH STATUS	View the status of the individual searches requested for this applicant
VIEW IN PROGRESS REPORT	Formal report of all searches completed as of date of the report
VIEW COMPLETED REPORT	Final report once all requested searches are complete.



EDIT APPLICANT INFO

▲ Grajeda Kelly xxx-xx-4444 05/23/2019 **INFO NEEDED** Rexus Corporation

▲ EDIT APPLICANT INFO - **INFO NEEDED**

Submit As...		Billing/Location Code			
Rexus Corporation					
First Name *	Middle Name	Last Name *	Suffix	Maiden Name	
Kelly		Grajeda			
Street		City	State	Zip	
123 Snow Lane		Greendale	Wisconsin	53129	
SSN *	DOB *	Driver's License # *	Driver's License State *	Phone	Email *
xxx-xx-4444	04/04/1984				Kelly.Grajeda@yahoo.com
Notes					
<input type="checkbox"/> Rush request <input type="checkbox"/> Search all prior names for criminal records <input type="checkbox"/> Use all prior addresses in criminal searches					
				SAVE	CLOSE
DOCUMENTS REQUEST ADDITIONAL SEARCHES					

Expand this section to view the applicant information used to complete the requested searches. You can update or add applicant information, as needed.

- This form has the same fields and functions as the SUBMIT NEW applicant search screen.
- Required fields are indicated by an asterisk and red outline.
- Values entered previously are shown.
- Social Security Number cannot be edited. If there's an error with an SSN, contact your Rexus account manager for assistance.
- SAVE is disabled until you edit at least one field.
- Click CLOSE to exit the screen without saving changes.

Refer to the "[Submit New Applicant](#)" section for help completing this screen.

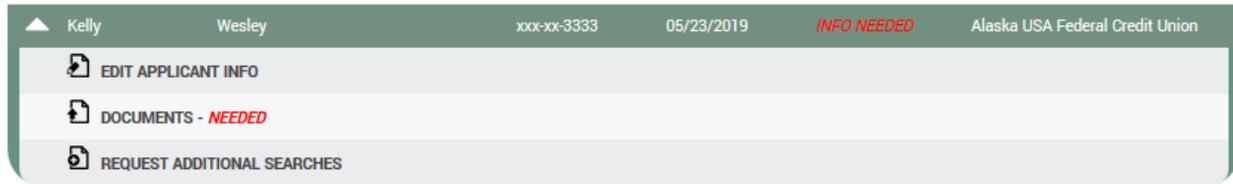
INFO NEEDED

If you request an additional search that requires information not previously entered, "INFO NEEDED" appears in the STATUS field and next to the EDIT APPLICANT INFO icon. In the screen sample, you can see that the driver's license fields are required but blank.

NOTE: If you change a value, any completed search requests will not be repeated using the updated information. Contact request@rexus.com if you need a search repeated using new values.

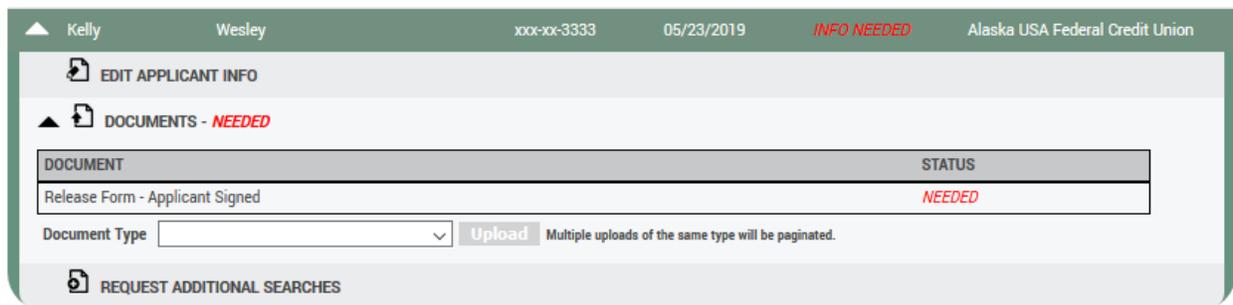


DOCUMENTS



Expand this section to view (previously uploaded) or add documents.

If a document is required to be able to process a requested search, “NEEDED” appears next to the DOCUMENTS heading (and the record status is INFO NEEDED).



Field Descriptions

Field	Description
DOCUMENT	Name of document. If the document has been uploaded, this will be a clickable link.

- STATUS** Status of the document.
- RECEIVED: Document has been uploaded
 - NEEDED: Required document still needed
 - SENT: Document (signature request) has been sent to the applicant but not received.

NOTE: The SENT status appears only for companies that have contracted with Rexus to send documents on their behalf. If you are interested in this service, contact your account manager.

Upload Documents

1. Select the type of document being uploaded in the drop-down list.
2. Click Upload.
3. Navigate to and select the document on your computer or network.

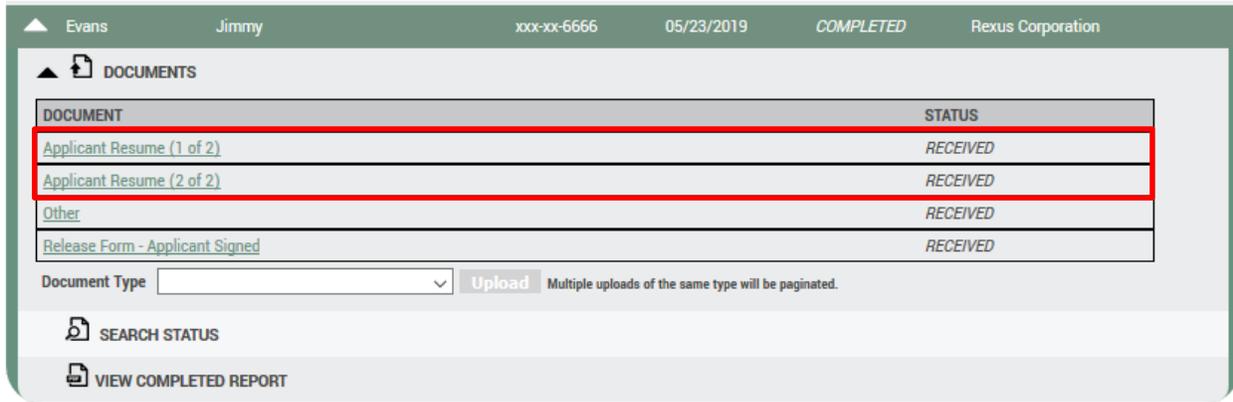


4. Click Open.

RESULT: Once the document is uploaded, the status is RECEIVED. Click the document name to view the uploaded document.

Multiple Uploads and Pagination

If you upload multiple files of the same document type, the system applies page numbers the files based on the order in which they were uploaded, as in the following example.

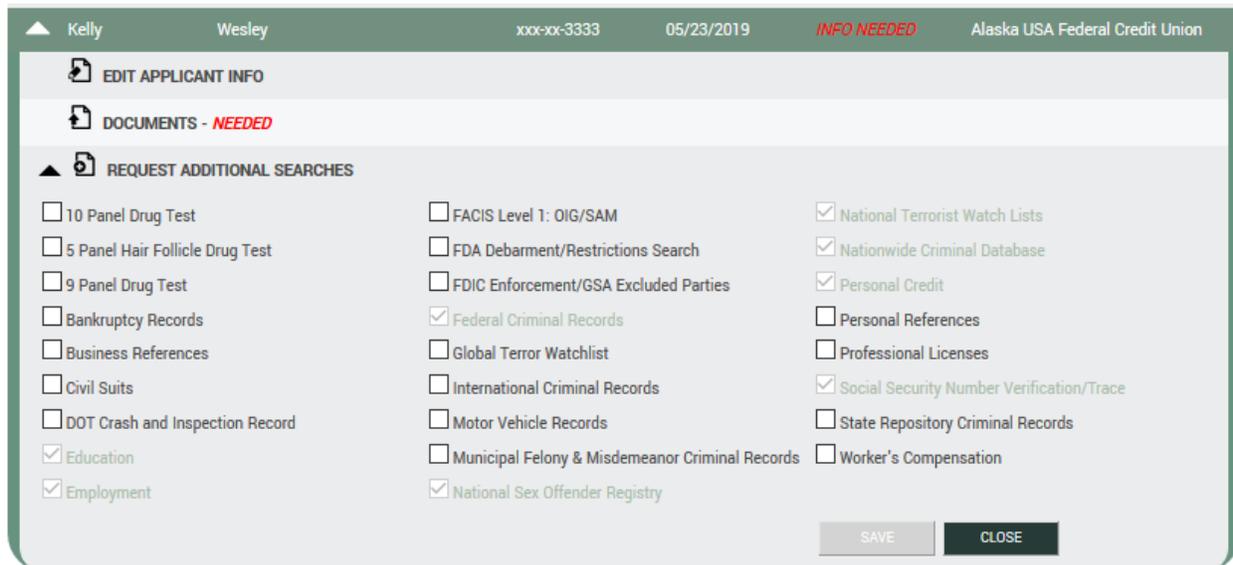


Review Uploaded Documents

You can review documents uploaded to an applicant record, which may include documents you uploaded as well as those uploaded by the Rexus team.

To download a previously submitted document, click the document title. You will be prompted for a location to save the file.

REQUEST ADDITIONAL SEARCHES





Expand this section to view the searches requested or to add more searches to the request.

- The searches already requested appear checked and disabled. You cannot de-select an in-progress search.
- You may add searches until the record is in a COMPLETED status (all searches are complete). Check the boxes next to the searches you want to add, and then click SAVE.
- The SAVE button is disabled until you make a change.
- To exit without saving changes, click CLOSE.

SEARCH STATUS

▲ Vladimirovna Troy xxx-xx-7777 05/23/2019 PROCESSING Rexus Corporation

- 📄 EDIT APPLICANT INFO
- 📄 DOCUMENTS
- 📄 REQUEST ADDITIONAL SEARCHES
- ▲ 📄 SEARCH STATUS

SEARCH	REPORTING ENTITY	REQUESTED	COMPLETED
Business References		05/23/2019	
Credit		05/23/2019	
Education		05/23/2019	
Employment	Employer	05/23/2019	
National Federal Criminal Records	US District Courts – National	05/23/2019	
National Sex Offender Registry	National Sex Offender Registry	05/23/2019	
National Terrorist Watch Lists	OFAC - National Terrorist Watch Lists	05/23/2019	
Social Security Number Verification/Trace	National SSN Search/Trace	05/23/2019	05/24/2019

📄 VIEW IN PROGRESS REPORT

Expand this section for a snapshot of what requested searches are complete and what searches are still in progress.

- This option is not available until at least one search is complete.
- To see the results of completed searches, view the report.

Field Descriptions

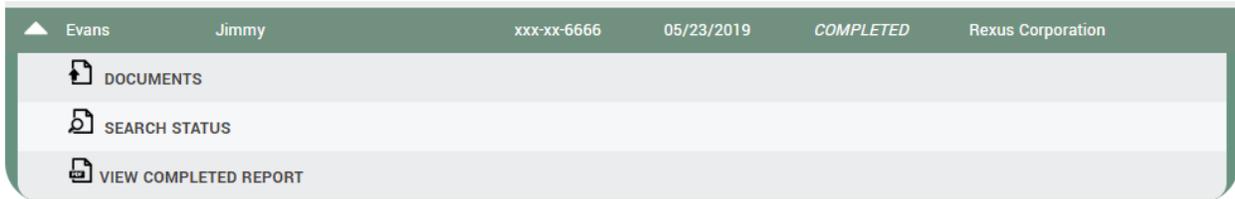
Field	Description
SEARCH	Name of search requested.
REPORTING ENTITY	Entity from whom the information is being requested.
REQUESTED	Date the request was submitted to the reporting entity.
COMPLETED	Date the search was completed.



VIEW IN PROGRESS REPORT/VIEW COMPLETED REPORT



If the record is in a PROCESSING status, you can access the in-progress report, which includes any search results completed as of the date you view the report. This option is not available until at least one search is completed.



If the record is in a a COMPLETED status, you can access the completed report, which includes all completed search results.

When you click the link, you'll be prompted to save the report to your computer.



SUBMIT NEW APPLICANT

IMPORTANT: At this time, only applicants in the U.S. can be submitted via the portal. If you need background screening on a non-resident applicant, contact Rexus.

FIELD DESCRIPTIONS

Field	Description
Submit As . . .	If you manage applicants for more than one employer, select the employer for which you are adding this applicant record. NOTE: This field is visible only if you are managing applicants for multiple companies.
Billing/Location Code	Billing or location code associated with this applicant record, if applicable.
First Name	Applicant's legal first name.
Middle Name	Applicant's legal middle name.
Last Name	Applicant's legal last name.



Field	Description
Suffix	Applicant's suffix (jr, sr, III, etc.). NOTE: Adding a suffix can be important, especially with credit bureau reports.
Maiden Name	Applicant's maiden name, if applicable.
Street	Street address of applicant's current residence (not mailing address). NOTE: Some searches will not accept a P.O. Box, so a physical address is required.
City	City of applicant's current residence.
State	State of applicant's current residence.
Zip	Zip code of applicant's current residence.
SSN	Applicant's Social Security Number.
DOB	Applicant's date of birth.
Driver's License #	Applicant's driver's license number.
Driver's License State	State that issued the driver's license. NOTE: This field is required if you enter a driver's license number.
Phone	Applicant's primary phone number.
Email	Applicant's email address.
Notes	Any notes, details, or instructions the Rexus team might need regarding the applicant or requested searches.
Rush Request	If checked, this applicant request will be expedited.
Search all prior names for criminal records	If checked, any prior names (known aliases) will also be researched for any selected criminal searches. NOTE: Maiden names are not automatically included in criminal searches unless this box is checked.
Use all prior addresses in criminal searches	If checked, any prior addresses will also be used for any selected criminal searches.
Searches Requested	After selecting a search profile, check the box next to each search needed (or uncheck the box for any searches not needed). See the " Quick Reference Guide " (from the Rexus <i>Getting Started Guide</i>) for a description of available searches. IMPORTANT: Specific criminal searches must be selected; otherwise the search all names and addresses checkboxes will be ignored.



Field	Description
Apply Profile	Search profile applied as a starting point. Once a profile is applied, you can add or remove individual searches. NOTE: During onboarding, the Rexus team works with the authorized user to establish common search profiles (e.g., a collection of searches regularly used). For additions or revisions to the available profiles, contact Rexus. Only the authorized user for a company may request profile changes.
SUBMIT	Click to create the record and submit the search requests.
CLOSE	Click to exit without submitting the applicant search request.

SUBMIT NEW APPLICANT AND SEARCH REQUEST

Applicant information must be entered and a new release form signed every time you submit a new search request, regardless of whether that person has been an applicant previously.

1. On the menu, select SUBMIT NEW.
2. If you manage applicants for more than one employer, select the company for which the applicant is being searched.
3. Enter the location or billing code associated with this applicant, if applicable.
4. Enter all required applicant information. Required fields are designated by a red asterisk and outline.
5. Complete additional fields, as information is available (optional).

NOTE: If Rexus is sending documents to the applicant on your behalf, Rexus will obtain the remainder of the information from the applicant.

6. Add any notes for the Rexus team (optional).
7. Check the boxes for desired additional services (rush request, use prior names and/or addresses).
8. Select a search profile to apply.
 - If there is only one profile defined, that profile is automatically applied.
 - If there is more than one profile defined, the default profile is automatically applied. Select an alternate profile from the drop-down list, as needed.

9. Add or remove individual searches, as needed.

NOTE: Some optional fields may become required, depending on the searches you add. For example, if you add a Motor Vehicle Records search, both drivers' license fields must be completed.



10. Click SUBMIT.

RESULT: Once the applicant record is created in the system, you are routed to the [REVIEW EXISTING](#) screen with the newly added record expanded. Review the applicant record for any incorrect information or needed required documents.

LAST NAME	FIRST NAME	MIDDLE NAME	SSN	REQUEST DATE	STATUS	COMPANY
▲ Doe	Jane		xxx-xx-6789	06/23/2019	INFO NEEDED	Rexus Corporation
EDIT APPLICANT INFO						
DOCUMENTS - NEEDED						
REQUEST ADDITIONAL SEARCHES						

NOTE: Because Rexus requires a signed release form before starting any search, all applicant records will initially have an INFO NEEDED status and show either NEEDED or SENT next to DOCUMENTS. This and any other required documents can be added at any time, but be aware that processing may be delayed (or may not start) until the required documents have been uploaded. See the [“Upload Documents”](#) procedure in the Documents section.