

United Illuminating/Avangrid Program on UtilitySafe

Contractor User Guide

OVERVIEW

This guide has been created to assist United Illuminating/Avangrid contractors with navigating the UtilitySafe system and maintaining compliance with United Illuminating/Avangrid standards.

The following items are required for an applicant to become UtilitySafe-Certified:

- An approved background report (no more than 90 days old)
 - A signed consent form (consent forms are only valid for 2 years)
- An approved motor vehicle report if the applicant is assigned to a field program
- An approved badge photo

Photo Requirements

- Headshot only (top of head to just below chin, not full body)
- Image is in focus, not blurry or pixilated
- No sunglasses or hats
- Background is a neutral color, no patterns or dark walls
- Image file size is no larger than 500KB
- File type is a .gif, .png, .jpeg or .jpg
- Resolution is greater than 150px by 150px
- Completed online training

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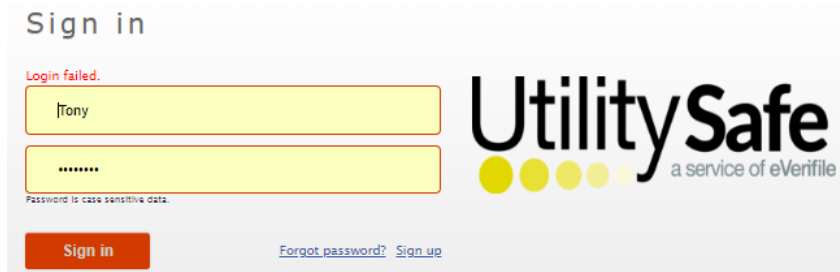
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LOGGING IN

Go to <https://utilitiesafe-eworkforce.everifile.com> and enter your username and password. If this the first time logging in, you should have received an email that contains a link to send you to this page. The system will then require selection of security questions and the creation of a new password.

Required Tasks

You will see a list of required tasks once logged in successfully. Once a task has been resolved, select Complete to remove it from the list. Possible tasks are described in the next section.



The screenshot shows a login page titled "Sign in" for UtilitySafe. It features two input fields: one for the username (containing "Tony") and one for the password (containing "*****"). A red error message "Login failed." is displayed above the fields. Below the password field, it says "Password is case sensitive data." At the bottom, there is a red "Sign in" button and two links: "Forgot password?" and "Sign up". The UtilitySafe logo is visible on the right side of the page.

List of Required Tasks on the toolbar.

- **Upload Photo**- This task generates when a photo is needed for an applicant to receive a badge.
- **Rejected Photo**- This task generates when an uploaded photo does not meet initial photo requirements. To upload a new photo for the badge, click the applicant's name in the required task list.
- **Recertification** – This task generates 90 days in advance of when an applicant is up for recertification. Notification of this requirement is also sent via email. The steps below are required to recertify an applicant:
 - A new, signed consent form
 - The applicant will need to sign in and complete training and testing.

If not recertifying this applicant, please be sure to inactivate the applicant to maintain compliance and stop the reminders from coming. Instructions for how to complete this action are listed later in the user guide.

- **Username Notification** – This task generates to provide the applicant's username and applicant id. The applicant id is the applicant's initial password.
- **Completed Report Review** – This task generates when background reports are completed.
- **Approval** – This task generates when applicants are approved for the program.
- **Appeal** – This task generates when applicants have been denied during the initial review of their background check.
- **Denied Applicants** – This task generates when the applicant has been denied by UIL/Avangrid after appealing.

Applicant Dashboard

Location:		Taj's UAT UIL Account		Applicant Search:		<input type="checkbox"/> Select to View Active Applicants <input type="button" value="Search"/> <input type="button" value="Export"/>		
<input type="checkbox"/>	First Name	Last Name	SSN/SSI	Report Status	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Report Complete Date	Created Date	Badge Expiration Date
<input checked="" type="checkbox"/>	Alan	Smith	xxx-xx-4D5D	Completed	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	05/09/2018 10:28	05/09/2018	
<input type="checkbox"/>	Susan	Customer	xxx-xx-4a12	Completed	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	05/08/2018 10:48	05/08/2018	05/08/2019
<input checked="" type="checkbox"/>	Jackie	Mathis	xxx-xx-6578	Completed	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	05/08/2018 12:09	05/08/2018	

- Background check (magnifying glass icon.)
- Training (worker icon)
- Testing (screen icon)
- Photo (camera icon)
- Badge (badge icon)

The following categories of information for each applicant are visible:



The Applicant Dashboard provides an overview of all applicants' status in the program. The colored circles indicate the current status

- Grey: No action has been taken
- Green: Clear / Approved
- Yellow: In progress
- Red: Failed / Needs Review
- Report status: "In Progress" if not yet finished, "Completed" in green if approved, or "Completed" in red if it needs review.

APPLICANT ACTIONS

On the applicant dashboard, there is a list of buttons grouped under a category named Applicant Actions. This is a list of buttons that are available to assist with managing applicants. In this section of the user guide we will cover those actions.

Submitting an Applicant (Individual and Multiple Entry)

Select Add Applicant and click Go. Add the applicant, select the office or field programs, and choose your location. The field program requires a motor vehicle reports. Make sure all fields marked with an asterisk (*) are completed. Then click Save.

Please enter information carefully. **If first name, last name, SSN or DOB is edited after this initial creation, charges for a new background check will apply based on the applicant's living history and program fee.**

International Ordering

Program- When entering an applicant into the system, a prompt will appear requiring a selection be made based on the applicant's length of residency in the U.S.

Option 1: Applicants who have lived in the U.S. for the last seven years.

Applicant will undergo domestic screening only.

Program Fee: \$55.00 for the office program. \$58.50 for the field program.

Option 2: Applicants who have not lived in the U.S. for the entirety of the last seven years. Applicant will undergo international screening and domestic screening. This will only apply to applicants undergoing initial enrollment in the UtilitySafe program.

Program Fee: \$55.00 for the office program. \$58.50 for the field program, plus the cost of the international criminal report (price varies per country) *

Upon renewal [after one year] of enrollment, applicant will undergo standard program screening only.

Program Fee: \$55.00 for the office program. \$58.50 for the field program

Option 3: Applicants who have never lived in the U.S.

Applicant will undergo international screening only.

Program Fee: \$17.00 for training and credentialing plus the cost of the international report *(price varies per country)

Applicant Living History*: !
 Has only Lived in the US for the last 7 years
 First Name*: Has Lived in the US Less than 7 Years
 Last Name*: Has Never Lived in the US

Address Line 1*:
 Address Line 2:
 Country*:
 City*:
 State*:
 Zip Code*:

Gender:
 Date of Birth*:
 SSN/SSI*:
 Personal Phone:
 Active:
 Job Title*:
 Reference Field:

Email*:
 Re-Enter Date of Birth*:
 Re-Enter SSN/SSI*:
 Drivers License:
 Drivers License State:

Programs

Department
Gas Field Operations

Programs	Enterprise
Office	Avangrid
Field	Avangrid

NOTE: If your applicant's driver's license was obtained in Pennsylvania, Alaska, Washington, New Hampshire, Oregon, Georgia, Virginia or California you will be required to order the MVR from IIX.COM. Once the report completes, please upload the report on the **Required Tasks** pane under the **Upload Completed MVR Report** queue. Please contact 1-855-383-7434 if you have any questions.

Location
 Location:

Adding an Applicant to a Location

To Add an Applicant First:

Choose the location during the add an applicant function, before clicking Save. The applicant will appear under the specified location.

To Choose the Location First:

Choose the location. Click Add Applicant and fill out necessary information.

Editing an Applicant/Uploading a Photo

To edit an applicant, select their location. Then check the box to the left of the applicant's name and select Edit Applicant. Insert the correct information then click, Save.

If first name, last name, SSN or DOB is edited after this initial creation, charges for a new background check will apply based on the applicants living history and program fee.

Click the camera icon. Upload the photo and save. The yellow dot means under review. Photos must be headshots, in front of a light-colored background. Face may not be obscured

Photo Requirements



- Headshot only (top of head to below chin, not full body)
- Image is in focus, not blurry or pixilated
- No sunglasses or hats
- Background is a neutral color, no patterns or dark walls
- Image file size is no larger than 500KB
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Bulk Applicant Uploads

The bulk uploading feature was created to enter multiple applicants at one time. Click on the bulk upload button. Click on the **here** hyperlink to download a sample template. Once you have added all your applicants' information into the template upload the spreadsheet and the fields should automatically map to the existing fields in the system. After the applicants are added, you will have the ability to enroll them into a program.

The list of required information is listed below:

- First name
- Middle name
- Last name
- Name suffix
- Date of birth
- Driver's license number
- Phone number
- Email address
- Address 1
- Address 2
- Province/State
- Country

Maximum upload file size: 1 MB

[Download the Bulk Upload Template for countries United States and Canada](#) [here](#)

After uploading, match the columns in your batch file to the corresponding identifiers on the right. Just drag and drop the column labels from left to right.

Header Values	Mapping	Field Name	Data Type
		currentAddress.country	COUNTRY
		currentAddress.city	TEXT
		currentAddress.postalCode	TEXT
		currentAddress.province	TEXT
		currentAddress.street1	TEXT
		currentAddress.street2	TEXT
		middleName	TEXT
		primaryPhoneNumber	TEXT
		lastName	TEXT
		nameSuffix	TEXT
		email	TEXT
		gender	TEXT
		birthDate	DATE

View Reports

Select the box next to the individual. Click View Reports. Select Preview. The report details will appear in the report window in PDF format.

Report status is available for each report:

- COMPLETED for a completed report (see earlier section for color status)
- IN PROGRESS for a report that is pending
- REJECTED for a report with issues

Applicant History and Notes

To view the history of an applicant, click History. This will display every action that has been completed on the applicant. To view and enter notes for an applicant, click Notes.

Assigning a Program

Select the applicant by checking the box by their name and click Programs. Check the box next to the desired program and then click Enroll

Denial Process- Appeal and Dispute

Applicants may be denied access to the UtilitySafe program due to the following:

- A felony conviction within the last 7 years
- An Active Warrant
- An open felony court case
- SSN discrepancy
- Your release from incarceration within the last 5 years
- A history of pleading guilty to felony and/or misdemeanor crimes of concern
- Out of service area
- An Open Court Case
- Disqualifier
- Background check cancelled by contractor
- Background check of concern
- DUI conviction in last year
- Multiple DUI convictions
- Registered as a Sex Offender
- Suspended or revoked driver’s license

Below are the most common reasons for an SSN discrepancy:

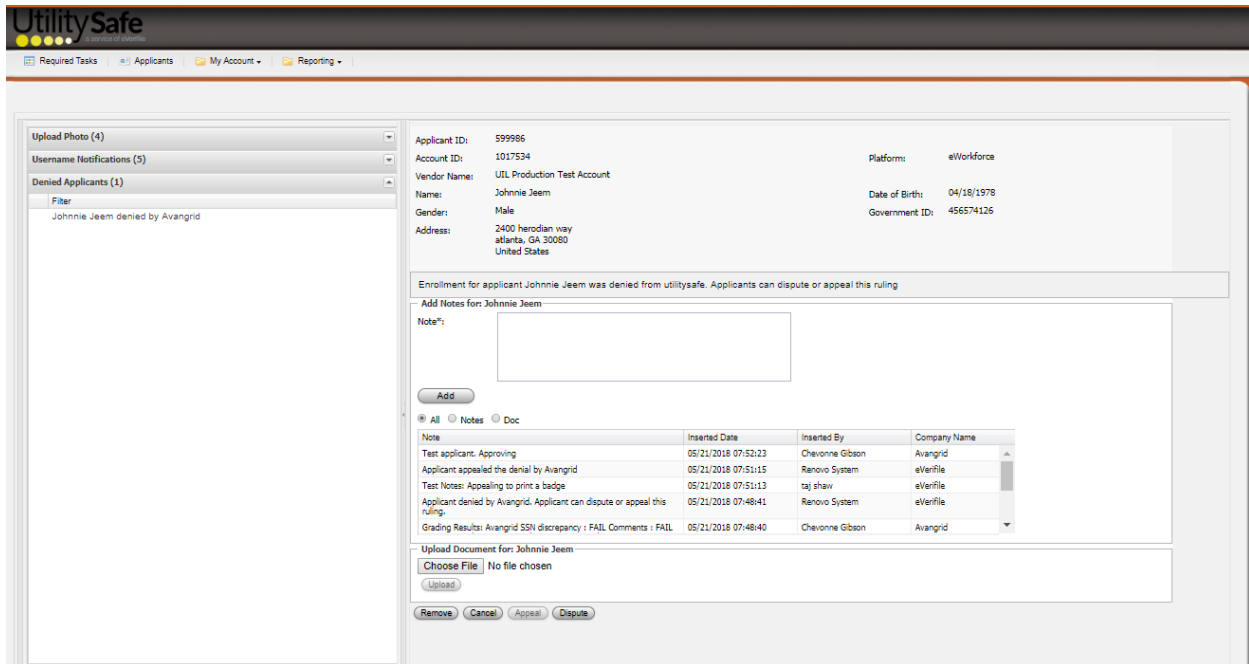
Reason for SSN Discrepancy	Example	How to Resolve
Applicant’s legal first name was not entered	Entering “Dan” instead of “Daniel”	Update applicant’s First Name*
Multiple last names appear	Women with maiden names or applicants with 2 last names	<ul style="list-style-type: none"> • Upload front/back of Social Security card and front/back of government-issued ID (ex. Driver’s license/ passport) to Appeals folder through Documents button

		<ul style="list-style-type: none"> Update applicant's last name to contain all last names*
Multiple first names appear	Applicants who often go by their middle names or nicknames	Upload front/back of Social Security card and front/back of government- issued ID (ex. Driver's license/ passport) to Appeals folder through Documents button
Different person's name/ address history appears	Applicant's name is Adam Smith, but San Roberts is the only name that appears on the address history or appears several times	<ul style="list-style-type: none"> Check SSN* Upload Social Security card and government-issued ID to Appeals folder
No Address History OR SSN Validation Fail	<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/ passport) to Appeals folder through Documents button

Determine if an **appeal** or **dispute** is required for your applicant. (only one should be requested)

*Appeals can be made in these scenarios, if the information background report provided is **accurate** but consideration of extenuating circumstances is requested.* To file an appeal, select the denied applicant's name. Upload any documentation needed to support the appeal and click Appeal. Then, click the department you are appealing to and enter a reason for the appeal. Click Appeal Action. Click Yes in the confirmation box to file the appeal. If an applicant's appeal is denied, it will not be reconsidered.

*If information returned in a background report is believed to be **inaccurate**, please file a dispute as soon as possible.* Click the box next to their name, and then Dispute. In the Notes section, insert specific information about what the applicant is disputing. Then click Add.



Reprint Badge

Generating a new badge will cause a badge for the completed program to be reprinted and shipped. There is a standard badge fee that applies. If there are additional programs that are not yet complete, another badge will be automatically created and shipped when all programs have completed. The cost of a badge is \$13.00.

Print Report

Select an applicant and click Print Report to print the consumer summary report.

Moving an Applicant

You may have an applicant that is in one location for your company and you may need to assign the applicant to a different location. The move applicant feature allows you to move the applicant to the desired location. Click Move Applicant under Applicant Actions.

- Applicant must be in an active status.
- Applicant must either: have an active UtilitySafe badge OR not be enrolled in any programs.
- Moves must take place in the company's main account.

USPS Tracking

Access the tracking number for a shipped badge by clicking the box next to the applicant's name and selecting Tracking Number. Copy the number that appears and enter it on www.usps.com.

Deactivating/Reactivating an Applicant

To deactivate an applicant, check the box next to their name and click Deactivate. Deactivating an applicant will remove all required actions and mark the status of the applicants as in-active. Please carefully select this option, as reactivating an applicant may cause additional charges associated with reactivation.

To reactivate an applicant, go to Edit Applicant, click the Active checkbox and save. If less than 90 days since deactivation, this applicant will be reactivated and maintain the same expiration date prior to deactivation. There is no charge unless a new badge is requested. Badge rates are \$13.00.

If more than 90 days since deactivation, making this selection will generate a new background check, the applicant will be required to take training and testing, and a new badge will be issued once the process completes. Program Fee is \$55.00 for the office program. \$58.50 for the field program. Additional fees will apply based on applicant's living history.

APPLICANT TASKS

Retrieve Training and Testing Information

To retrieve the username/password for an applicant, click Manage users, then Applicants. Enter the applicant's first or last name in the field, then click Search to find the applicant's username.

To reset the password, click Reset Password.

To restore training, click the button under the Restore Training column. If you have multiple locations, choose Locations, select the applicant's location, and then click Account users to access the Restore Training option.

Applicant Search Status

To search or filter applicants by status, click the Applicants tab and then Applicant Search Status. Choose the desired status from the drop-down menu. All applicants of that status will appear in a list. Export by clicking Export Results. Choose a date range to further refine your search.

Summary Report

The summary report feature gives insight to each applicant in your program. The report includes:

- Company Name
- Applicant Name
- Last Name
- DOB
- State/Province
- Training Date
- Test Date
- Created Date
- Background Date
- Report Status
- Report Results
- Program Name
- Enrollment Date
- Program Status
- Applicant Status
- Renewal Date
- Denied
- If Denied, Denial Reason
- Appealed?
- Overturned
- Badge Issued
- Badge Number
- Job Title
- Admin Subscription Checkbox Date Time
- Admin Subscription Checkbox username
- Admin Program Enrollment Date Time
- Admin Program Enrollment username
- Applicant Checkbox Date Time
- Applicant username
- Top Parent Company Name
- Recertified Date

Click the Reporting tab, then the Summary Reports Tab. Choose All or a specific location, then Download Applicant Summary Report. Click OK to begin the download. Open the file to view.

MY ACCOUNT

Managing Users

Select My Account and choose Manage Users.

If you cannot see the add button, hold the button and use the CTRL (-) sign to zoom out on the application.

You can search for a user, enable or disable a user's access, and create users.

The following are the user roles and their capabilities:

- **Sponsor Company Contract approver**- This user has the ability to approve/deny contract company's enrollment relationship with the program.
- **Sponsor Company Admin**- This user has the ability to assign roles to all sponsor company users. The user has access to view the applicant dashboard, applicant information including the badge. The user has access to all functionality within the sponsor company's program.
- **Sponsor Company Applicant Approver**- This user has the ability to access the required task list to review applicant's reports.

User Info and Role Assignment

Roles are defined by the type of activities you want the user to be able to perform. To edit a user, click Edit. To add a user, select Add. Add the user's name, email, and phone number.

Choose a role by selecting it and using the right arrow to add it to the right-hand screen. You can restrict user access to certain report types by selecting them and moving them to the left-hand screen. Click save. An email will be sent to the new user with login information and instructions on how to create their own password

Assign a user to Multiple Accounts

If a user needs access to multiple accounts, contact Customer Support at 1-800-560-6435 or via email at support@everifile.com.

Shipping Contact

You can have badges and accessories sent to different locations. Go to the My Account tab then click Locations. Enter information for the person receiving packages from UtilitySafe at that location. Then click Save.

BILLING

View Invoice

To access the organization's invoices, click on My Account and choose Billing, click the invoice you want to view.

Updating Payment Information

Click on My Account, then billing and then Update Payment. If there is an unpaid invoice, do not select pay now. The system is designed to automatically process payments with an updated card.

MY INFO

The My Info tab includes contact information for the company, all of which can be edited.

DOCUMENT LIBRARY

Accessing Library

Click My Account and then Documents.

Uploading Documents

users can upload required documents with unlimited storage space. Click Add Document. Select a system folder and document type. Click Save.

Viewing and Printing Your Documents

To view a document, select the folder and then click it. To print, right click with mouse and select Print.

Deleting Documents

To permanently delete a document, select the delete button to the right. Deleted documents are not recoverable.