



*FellowshipOne*TM

Background Check User Guide



Automated Background Checks

Background Checks help you to ensure your staff and volunteers are the best match for your ministries. This guide provides information for managing the Automated Background Check system in Fellowship One.

INTRODUCTION

With church security breaches at a high point, the practice of background checks has not only become acceptable practice, but a necessary practice as well. With the usual “open door policy” that most churches carry, a security plan must be in action. The first and easiest plan to set in place is mandatory background checks for all staff and volunteers. It is recommended by security experts that background checks be made a part of the initial interview process and then be done periodically to ensure safety and security for your church members. More and more churches are finding that they have a legal and moral responsibility to their members to screen anyone supporting or providing services to their congregation. This document explains the steps in making Automated Background Checks through Fellowship One work for you and your church.

MANUALLY SUBMIT A BACKGROUND CHECK

To submit a background check without using the volunteer pipeline (this is referred to as a “manual submission” even though the process is still automated), complete the following steps:

1. While logged into Fellowship One, click the **People** drawer.
2. Under the **Volunteer Pipeline Menu**, click the **Background Checks** link.
3. In the upper right hand area, click the **Add** button.
4. Click the **Find Person** Link and search for the individual.
5. If the birth date does not automatically populate, you will need to enter it.
6. Be sure to enter the social security number.
7. Under **Requirement Type**, select **Background Check**.
8. Click **Submit**.

You will be able to see the progress for the request on the Background Checks page.

TO VIEW THE BACKGROUND CHECK DOCUMENT

To view the background check document, please click the person’s name on the Background Checks page. This will take you to the Individual Record in Fellowship One. Please scroll down to the **Requirements** section. If you have the right to view background checks, you will see a note icon in the **Document** column indicating there is a report to view. Click that icon to view the background check results.

Using the Volunteer Pipeline

If you would like to use the Volunteer Pipeline to process your Volunteers and include an automated background check, please consult the **Fellowship One Learning Center** for more information which can be accessed through the Help menu in the Portal.

BACKGROUND CHECK STATUSES

There are two statuses related to Background Checks: **Request Status** and **Requirement Status**.

Request Status

Request Status refers to the state of the Background Check Request. The Request Statuses are as follows:

- **Submitted to Vendor:** The Background Check Request is waiting to be transmitted to the vendor for processing. There is an automated process that runs periodically between Fellowship One and the vendor. If your Background Check Request is in this status, it should be transmitted with the next cycle of the process.
- **Vendor Processing:** Background Check is being processed by the vendor. You will see the tracking number assigned to the request by the vendor at this time.
- **Technical Failure:** Background Check Request has failed due to a technical difficulty. The Product Support team will be able to determine the reason for the failure. ***This request will not reprocess automatically.***
- **Rejected by Vendor:** Background Check Request has been rejected. This usually occurs if the request is a duplicate or if the Social Security Number is set to all 1s or 0s. ***This request will not reprocess automatically.***
- **Completed:** Background Check Request has been completed and a report is ready to be viewed.

Requirement Status

Requirement Status refers to the status of the Background Check Requirement. The Requirement Statuses automatically set by the system are as follows:

- **Approved:** The completed report has been auto-approved by the system. It is still highly recommended that you review the report to verify the Social Security Trace did not fail.
- **Completed:** This indicates the report is complete and there are flags that need to be reviewed. You will need to decide to Approve or Not Approve the Background Check Requirement based on the attached report.
- **Pending:** This Requirement Status is used when a Background Check Report has not yet been returned.
- If your Request Status is **submitted to Vendor** or **Vendor Processing**, this is an indicator that your request is processing as intended.
- If your Request Status is **Technical Failure** or **Rejected by Vendor**, you will not receive a report automatically and you will need to resubmit your request. You may also contact Product Support to determine why the request failed.

The Requirement Statuses manually set by a Fellowship One user with the **View Background Check**

Security right are as follows:

- **Approved:** Can be manually applied to a Requirement with a status of Completed by a Fellowship One user after reviewing a flagged report.
- **Conditional:** Can be used to indicate a volunteer that can be used in *specific assignments only*.
- **Expired:** Indicates that you have set the Requirement to Expired based on your state's background check expiration laws.
- **Not Approved:** Indicates that you have decided the Requirement should not be approved based on the flags returned in the report.

How to Expire Background Checks

Fellowship One does not auto-expire background checks because the timeframe to run a new request varies by state. That being said, there is a process that can be used monthly to determine what reports will expire based on your state's requirements. The example below uses a state requirement of two years.

Use report **M3751** in the Fellowship One Report Library.

The screenshot shows a web interface for configuring a report. The title is "Individuals with Background Check Requirement". Below the title, it says "Please select the STATUS(ES) below *". There is a list box containing the following options: "Member - Child of Member", "Member - Member" (highlighted in blue), "Member - Student", "System - New Checkin", "System - New From Small Group", and "System - New from Website". Below the list box, there is a red-bordered box containing a radio button and the text "Additional Filters". Below that, it says "Choose an Output Type: *" and there is a dropdown menu with "Excel" selected. At the bottom, there are three buttons: "Run Report", "Cancel", and "Save to My Reports" (which has a green icon).

- Open the **Additional Filters** section of the report and choose a **Custom Date Range**.

Additional Filters

Background Check Company:
CIA

Show Requirement Type? Yes No

Show Date of Birth? Yes No

Use Date Filter (Requirement Date)? Yes No

Named Date Range: *

Custom Date Range

Start Date (Custom Date Range Only):
MM / DD / YYYY

End Date (Custom Date Range Only):
MM / DD / YYYY

For this example where the state requirement is two years, you will need to use a Start Date of the first day of the following month, counting back two years, and an End Date of the last day of the following month, counting back two years.

For Example: on January 1, 2010, I want to see what reports will expire in February 2010. So, I will choose Feb 1, 2008 as the start date and Feb 29, 2008 as the end date. This will provide a list of individuals who have a background check requests that will be two years old next month.

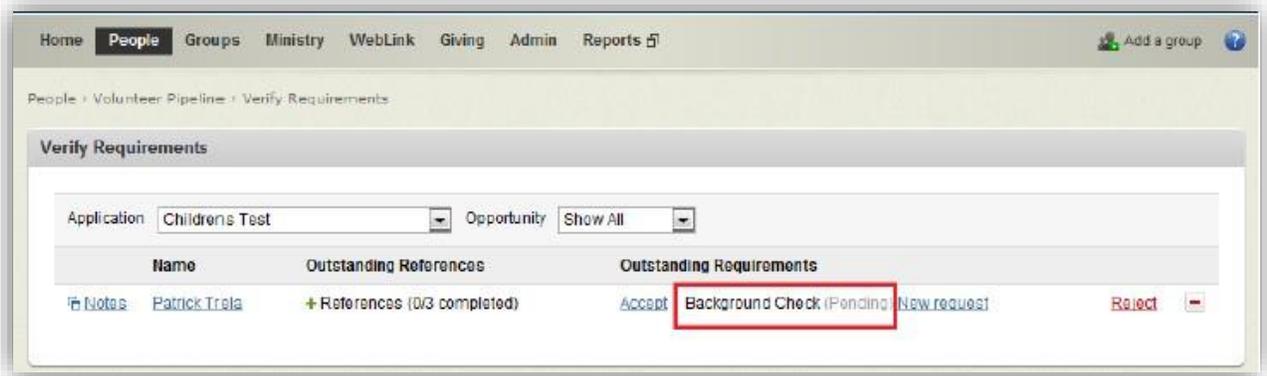
If you wish for all of these to Expire at that point, set the reports to **Expired**. In order to do this you will need to have the View Background Check security right. This change can be made on the Individual record on the Requirement section.

Use the following these steps to submit background checks on any individuals that need to be resubmitted due to expiration:

1. While logged into Fellowship One, click the **People** drawer.
2. Under the **Volunteer Pipeline Menu**, click the **Background Checks** link.
3. In the upper right hand area, click the **Add** button.
4. Click the **Find Person** Link and search for the individual.
5. If the birth date does not automatically populate, you will need to enter it.
6. Be sure to enter the social security number.
7. Under **Requirement Type**, select **Background Check**.
8. Click **Submit**.

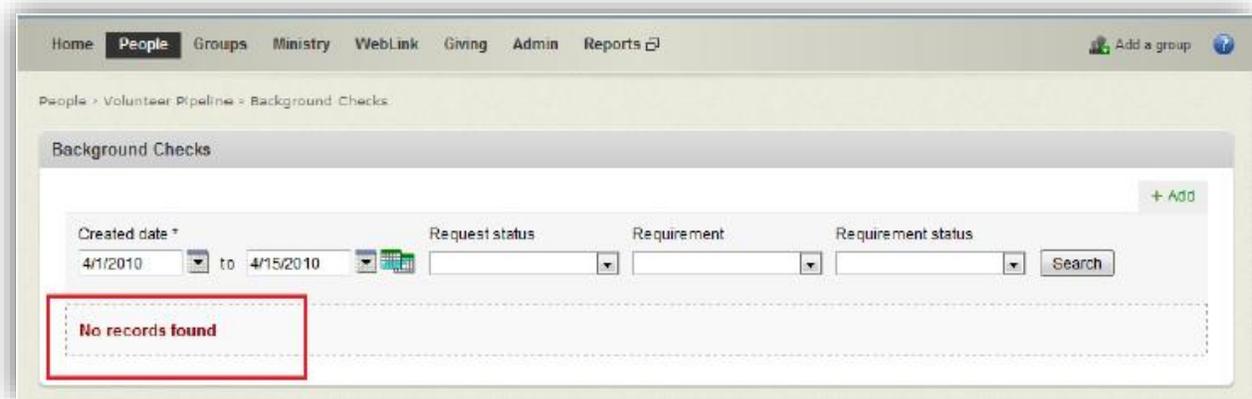
Unprocessed Background Checks in the Volunteer Pipeline

While reviewing requirements for your Volunteer Pipeline applications (**People >Volunteer Pipeline >Verify Requirements**) you may notice that background checks are not processing for some volunteers.



Volunteers will reflect a **Pending** Background Check as shown below.

However, looking back at the Background Checks page (**People >Volunteer Pipeline >Background Checks**) you will notice that a background check has not been submitted for the individual.

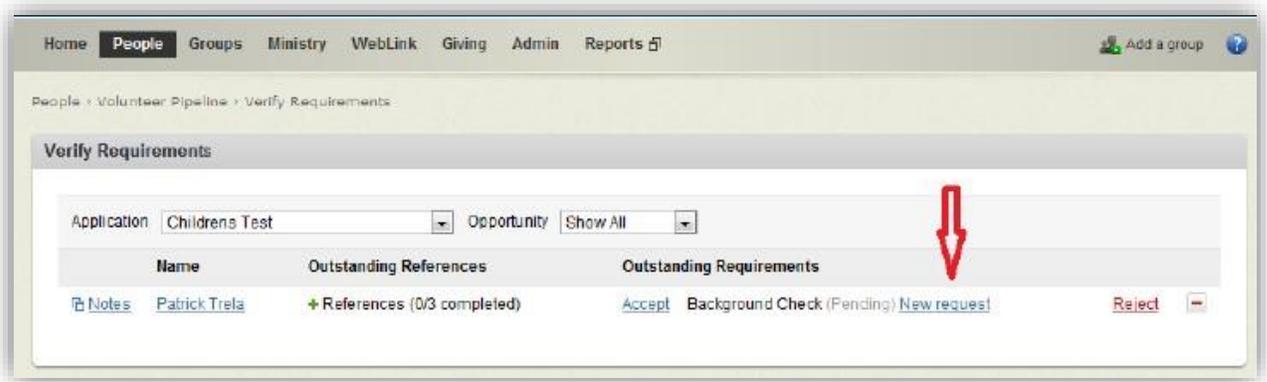


There are two situations that will prevent a Background Check Request from automatically processing through the Volunteer Pipeline:

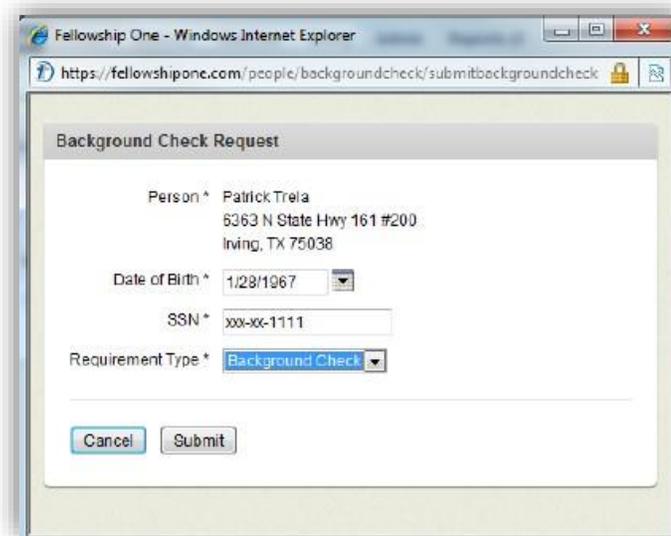
1. The person being submitted has an Approved Background Check Requirement in their Individual Record dated within the past two years.
2. The person being submitted has an Active Staffing Assignment, regardless of the timeframe for their last Background Check.

The great news is that you can submit the request “manually” in these instances where the Volunteer Pipeline does not submit for you. After this manual submission, the Volunteer Pipeline will recognize it and allow you to process the Volunteer normally. Here are the steps to submit the Background Check Request "manually":

1. In Fellowship One, on the People >Volunteer Pipeline >Verify Requirements page, please click **New Request** for the individual in question



2. If the birthday does not automatically populate, you will need to enter it.
3. Be sure to enter the correct social security number.
4. Under Requirement Type, select Background Check.
5. Click Submit.



If you would like instructions for using the **Volunteer Pipeline**, please refer to the **Fellowship One Learning Center** accessed through the Help menu in the Portal.