agenda®
SCREENING SERVICES

The Agenda System

Client Guide

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Step-by-step guide

Here is a step-by-step guide on how to use The Agenda System for your candidate's screening. This will talk you through uploading candidates to the system, how to pull off the reports and much more.

User set up

1

Once the branch has been set up, users can then be added to the portal. Agenda will take care of all the set up, all we need is:

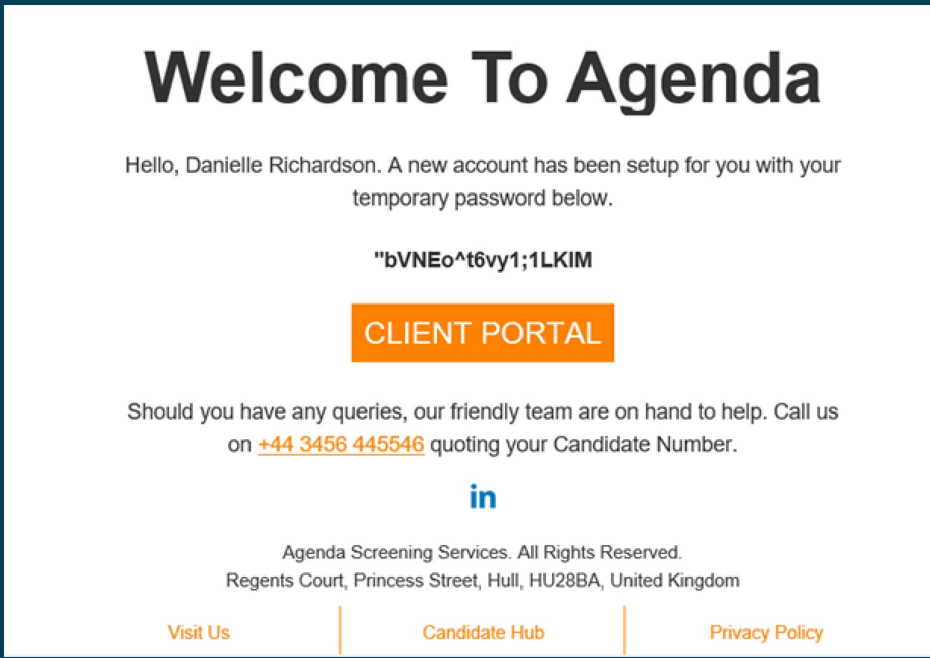
- Users first name & surname
- Users email address
- Branches that the user has permission to view.

Users can be added to any of the branches associated to the parent branch. The permissions listed below will apply to all branches they are allocated to.

Permission	What is it?
View all screenings	Allows the users the view of all screenings on the branch that they are allocated to.
Update all assigned screenings	Allows the user to approve feed and add notes to the screenings on the branch they are allocated to.
View own screenings	Allows the user to view screenings submitted by them only.
Update own screenings	Allows the user to approve fees and add notes to the screenings submitted by them only.
Request a Screening	Allows the user to request a screening.

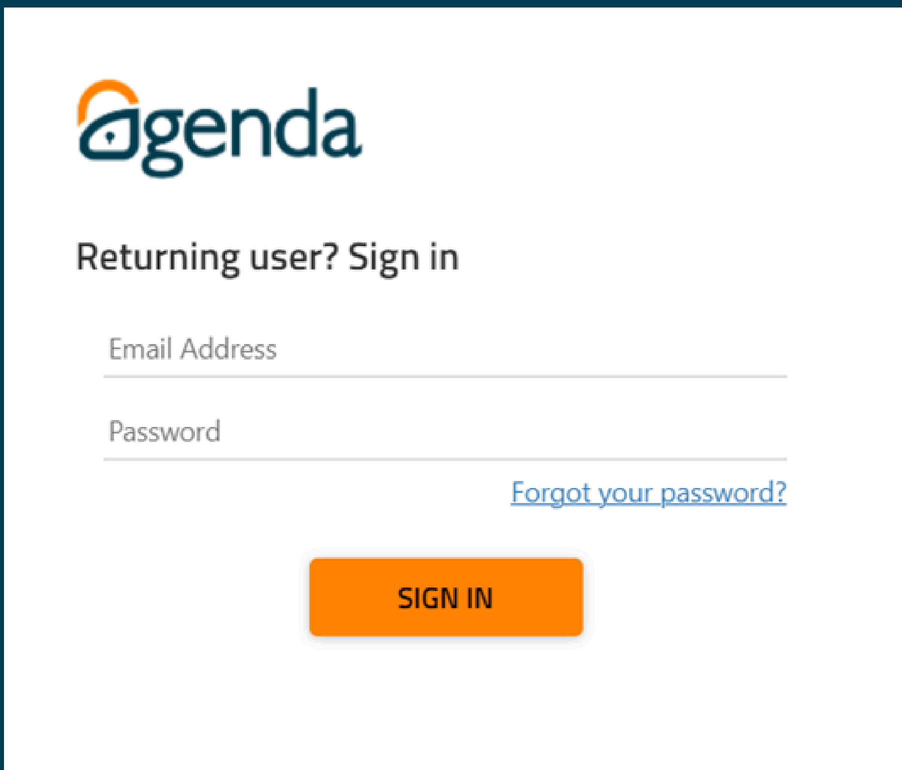
2

Once set up, the user will receive the email below prompting them to access the Agenda portal and complete the set up of their user account. Example below.



3

After following the link, the user will be prompted to type in their email address and temporary password (provided to them in the email they received). Please note, the email address, must be the same as the email address used during the user set up. If this needs to be changed, please contact Agenda and we can do this for you.



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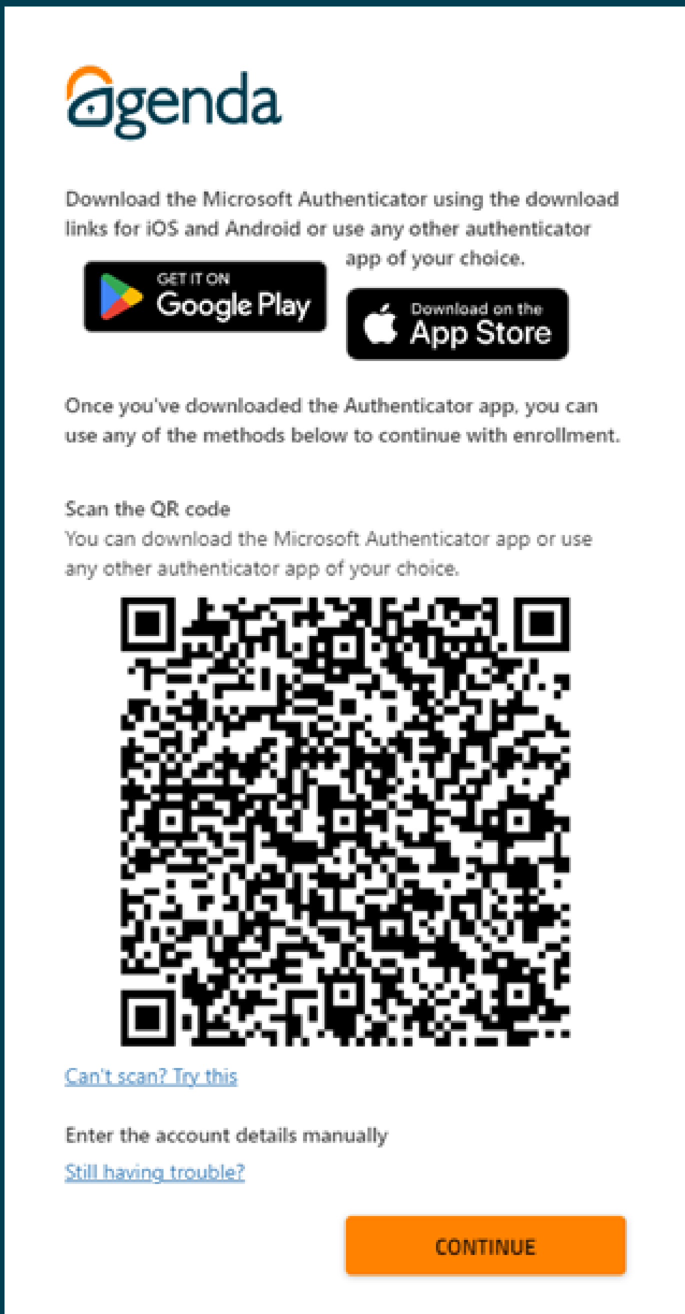
4

Once the email address and password has been entered, the user will be prompted to set their password. The password must be a minimum of 15 characters, containing 3 out of 4 of following: Lowercase characters, uppercase characters, digits or special character.



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5

In order to set up the MFA, the user must have downloaded the Authenticator app on their mobile device.

6

Once downloaded, the client can either go to the app, select + from the top of the screen, select “work or school” then scan the QR code on screen or enter the details manually within the app.

7

Once set up, each time the user logs in they will be prompted for a 6 digit code. This can be found in the authenticator app.

8

The user account is now set up the user can now use the Agenda portal.

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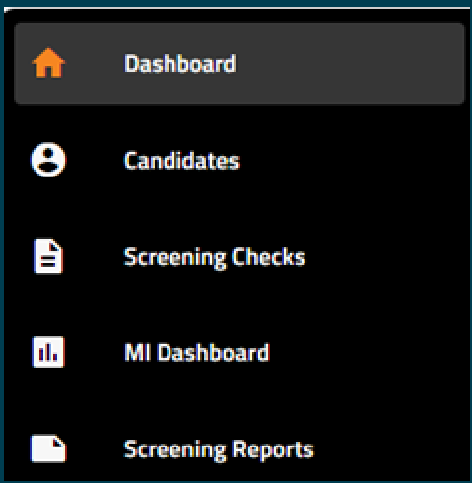
Accessing the Portal

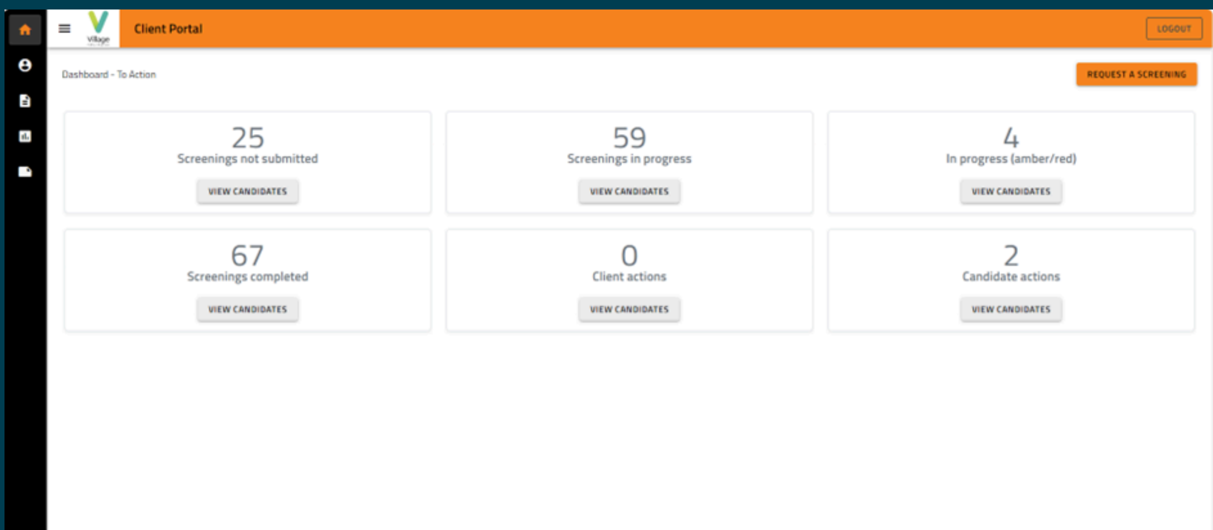
1. After set up, accessing the portal is really simple. Simply follow the link https://clientui.agenda-screening.co.uk/
2. Enter your email address and password
3. Finally enter the code from your authenticator app

Ensure you don't share links with your colleagues, and if you are accessing the portal from a shared device, use an in private browser or clear cached data before logging in.

Portal Navigation | Main Dashboard



Here is what you will be greeted with when you access the portal for the first time. The main dashboard (pictured below) contains all the quick access tiles, the menu (pictured to the left) gives you access to the main candidate's grid and the MI dashboard. To submit a candidate for screening, select the button on the right – Request a Screening.



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The tiles are pre-filtered to give you quick access to what you want to see.
Listed below is what is covered in each tile.

Tile	What is it?
Screenings Not Submitted	Candidate has been submitted for screening but has not yet submitted their information.
Screenings in Progress	Candidate has submitted their details to Agenda and the screening process is underway
In Progress (amber/red)	The Candidate's screening is in progress however there has been an Amber or Red flag on one or more of the checks that have been completed so far.
Screenings Completed	Once the screening has been completed and signed off, the candidate will move to the Screening Completed tile. Here you can access the candidates screening and retrieve the candidates end of screening report.
Client Actions	All candidates that have Client Actions outstanding will feature in this tile. Client actions are usually messages for you from all screening team for you to view and respond to or fees that require approval.

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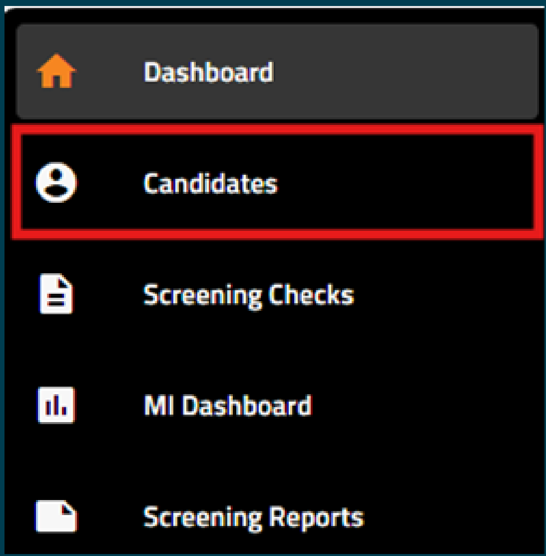
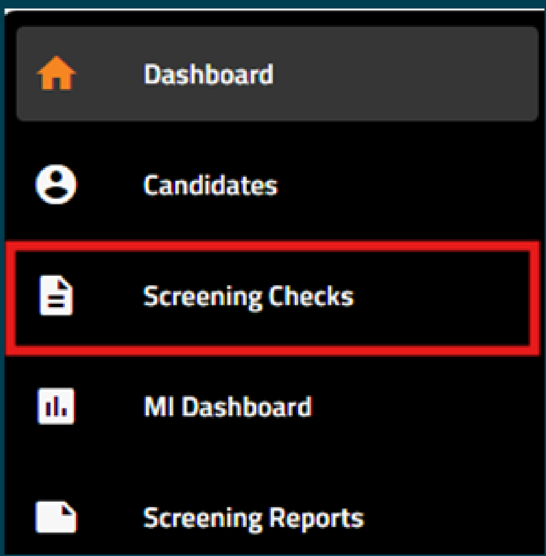
Candidates Dashboard



The candidate dashboard contains all the candidates allocated to the branches you have access to, from those you have just requested, through to those that are completed or cancelled. More on this later.

Screening Checks



Allows you to see all of the checks that are contained within the candidate, without the need to access the candidate directly straight from the grid. You can check at-a-glance each check status, and the results. All columns can be filtered and sorted for ease of use.

This is particularly useful if you require a certain check to be completed before moving onto the next stage of onboarding. You can filter by the check type and the status, and instantly get a full list of all candidates that have had the check in question completed and the result for each check.

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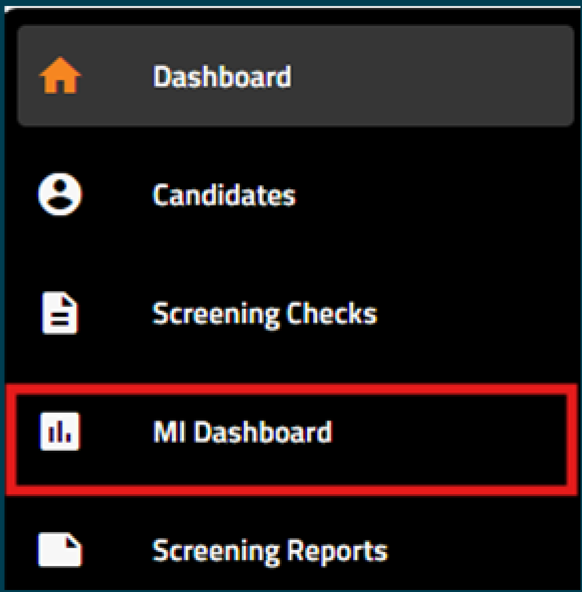
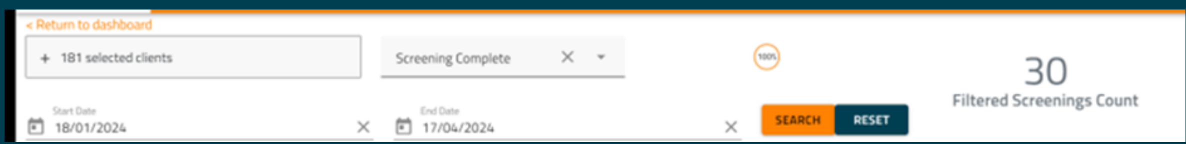
MI Dashboard



The MI Dashboard provides you with an insight into turnaround times, what element of the screening process may be causing delays, volumes and overall SLA.

Each set of statistics are broken down with a graph. You can hover over the graph to find out more details.

Filtering



1. First you need to apply the filter to obtain the desired statistics. The first box allows you to select the branches you wish to view statistics for, and the second box, the status of a screening you wish to view.

2. You can then select the date period you wish to cover.

3. So for example, if you wanted to check all candidates under the London Branch, completed in May, you would select London in the branch field, Completed in the Status field and 1st May 2024 – 31st May 2024 in the date field.

4. Once you are satisfied you have selected the correct data, click Search.

5. On the top right-hand side of the page, there is a count of the number of screenings currently included in this filter.

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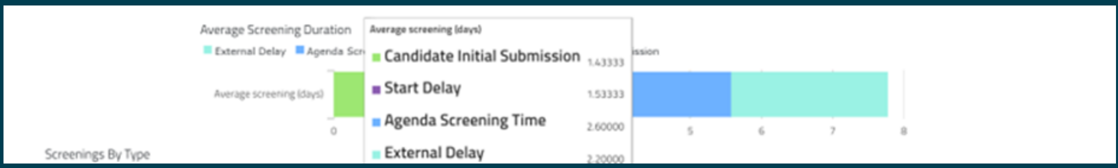
What do they mean?

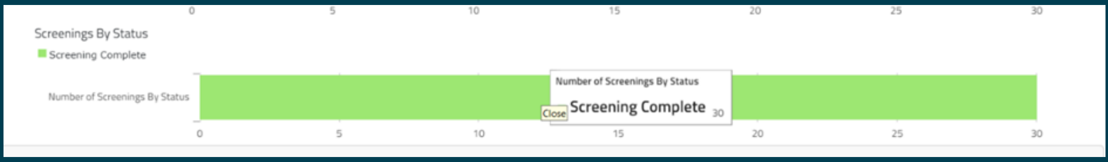
Below is a breakdown of what each graph means and how you can use it.

Looking at the screenshot below, the first graph provides a breakdown of each stage and the time it has taken to complete, on average for clients you have selected. By hovering over the graph, you can see the KEY and the figures instantly.

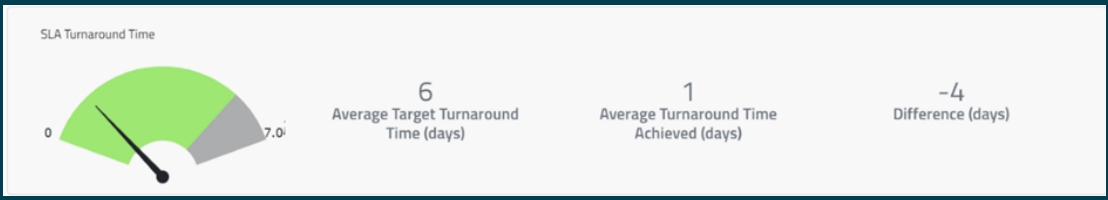


Moving onto the second graph, this provides a breakdown of the volumes per screening package.

Next, we have the number of screenings broken down by status. As we only have Complete selected in the Screening Type filter, the screenshot below is showing the volume of screenings in the Complete stage.



Finally, we have the SLA breakdown. The Average Target Turnaround Time is our agreed SLA with the client. The Average Turnaround Time Achieved, is the days on average.



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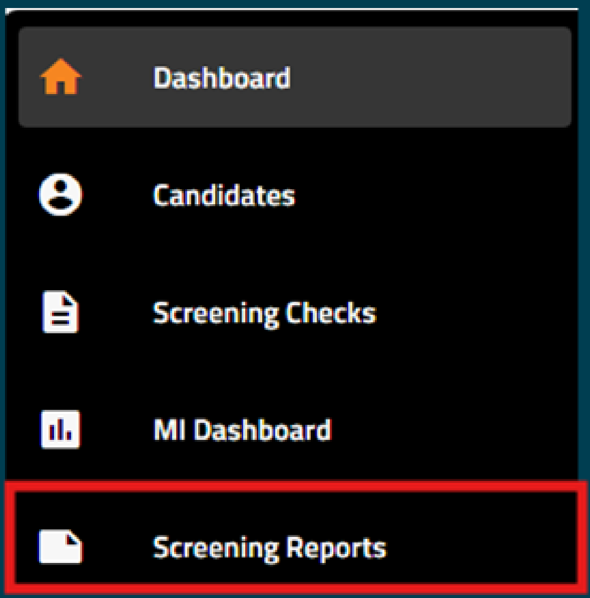
Screening Report Tile



The Screening Report Tile is an area in the portal that allows you quick access to all of your candidates Detailed End of Screening Reports. You can and easily download them without the need to access the candidates screening. To access the Report Tile, click on the Screening Reports icon on the left side.

End of screening reports - unread

This tile contains all the reports that haven't yet been marked as read, by someone at your organisation. This are all reports that require actioning. This tile can be easily filtered on any of the columns, giving you a more condensed list of what you need to look at.
Once you have downloaded or viewed your report. simply "Mark as Read" in the top right hand corner of the report and this will move over to the End of Screening Reports – All, where you can view later, if you require.

End of Screening Reports – All

Here is where you will find all the completed Screening Reports, that have been read and are waiting to be read. Reports will remain here until the candidate reaches anonymisation, after 12 months.

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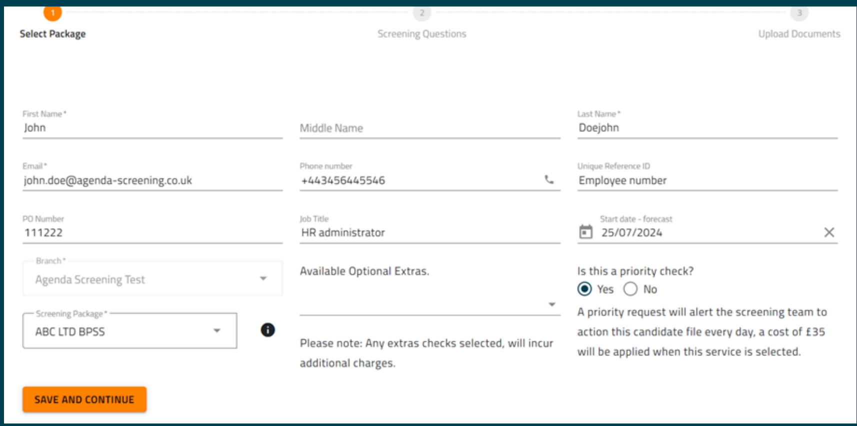
Requesting a new screening

To order a new screening, select Request a Screening from the top right-hand corner of the Client Dashboard, you will be required to complete basic fields, some of which are optional.



While most fields are self-explanatory, here is a quick run through what some of the fields mean and how you can utilise them.

Email address
The candidate will receive their link screening invitation via email, so it's important that this is correct.

Contact number
Necessary to allow us to successfully reach the candidate during the pre-submission stage to remind them to submit their details. It's important this is accurate.

Unique client reference
This can be used to help you link candidates to your own internal HR/payroll systems, so can keep a track on the candidates you need to.

Job title
Again this can help speed up the process, allowing your team and ours to quickly establish the candidates role within the company.

Start date forecast
This can be helpful when you are checking the progress on a candidate and can see the expected start date is approaching and can take appropriate actions.

PO Number
Allows us to quickly link with your accounts department to prevent hold ups with the screenings submitted. This may not always be required.

Branch
Selecting the right Branch is important too. We need to make sure the correct people can see your candidate, and the correct department are being billed

Package
Determines what screening the candidate will undergo. This cannot be changed once submitted.

Optional Extras
There may be additional checks you can add onto your screening packages, and they can be selected here. If you would like an optional extra check adding to the list, please let us know.

Priority Check
Selecting "Yes" to a priority check means we will endeavour to chase the screening every day. Useful if you have a candidate that you need to get through the screening process a little bit quicker.

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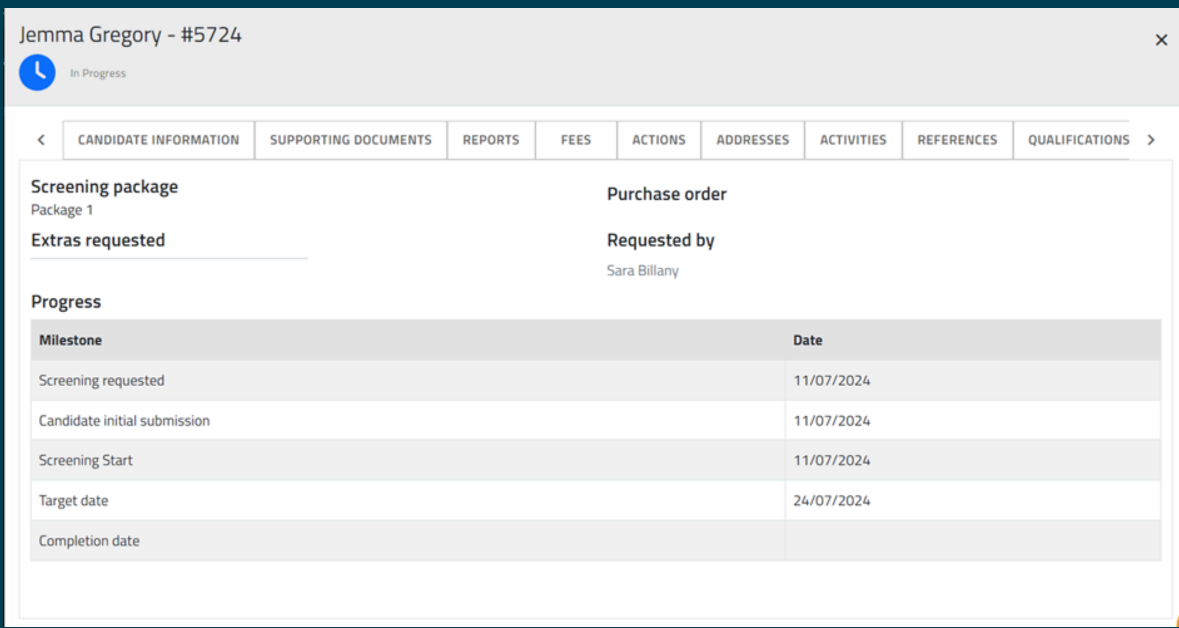
1

Once you have entered the information on the first page, depending on the package, we may require some more information. This information will relate directly to the check within the package you have selected.

2

You may be asked to upload documents, this is typically optional and the candidate will be able to see them.

Candidate Screening Navigation



To access a candidate screening, simply locate the candidate in the grid, using the filters to search and click on the candidate. This will open the candidates screening. Once opened, you will see a number of different tabs. Some of these types provide information, others are interactive. Details provided on the next page.

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Tab	What is it?
Overview	The Overview tab provides you with basic details on the screening in general. You can check the screening milestones, and see other information inputted by you, upon submission
Checks	All the checks contained within a screening package can be viewed here along with their status of each check. More information can be seen on the status of the checks further along in this guide.
Candidate Information	Basic information provided by the candidate can be viewed here.
Supporting Documents	The document hold for all documents made visible to you. Here you can check what has been uploaded so far, during the screening.
Reports	You can generate and view 6 different types of reports in the reports tab. These include, Interim Detailed Report, Interim Summary Report, Detailed Report, Summary Report, Candidate Information Report and Submission report, more information on what each of these reports mean, can be found further along in this guide.
Fees	View fees and their status.
Actions	From the Actions tab you can approve or decline any additional fee requests and cancel a screening.
Addresses	View the candidates address history, if provided. Please note this will be an available tab, even if Address History check is not a check within the package.
Activities	View the candidates activity history, and each individual status, if this forms part of a screening package. Please note this will be an available tab, even if Activity is not a check within the package.
References	View the candidates references, and each individual status, if this forms part of a screening package. Please note this will be an available tab, even if References is not a check within the package.
Qualifications	View the candidates Qualifications, and each individual status, if this forms part of a screening package. Please note this will be an available tab, even if Qualification is not a check within the package.
Notes	Here you can check notes that have been added to the screening portal by screener and the candidate, as well as add notes to the portal yourself. Not all notes added by the screener or candidate may be made visible to the client.

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Check Stages

The checks pass through various stages during the course of the screening process. Further details of each stage listed below.

Check Stage	What does it mean?
Not Started	This is the first status of a check. This status is visible at the Screening. Requested and Unsubmitted screening status' as well as inflight screenings. Once the check has been started the check will move to the next stage.
In Progress	Once the check has been started, it will move to the In Progress stage.
Awaiting Candidate	Agenda require action from the candidate, to allow us to proceed. Any checks with this status can be found in the Candidate Actions tile.
Awaiting Client	Agenda require action from you, in order to proceed. Any checks with this status can be found in the Client Actions tile on the dashboard. You may have also receive an email, prompting you to revisit the portal to view the notes.
Currently in QA	The check is awaiting QA sign off.
Complete	The check has passed through QA and is now complete
Check Stopped	Sometimes Agenda may no longer need to proceed with a check, this would typically be at your request. Check stopped indicates that work had already started on the check and some charges may be payable.
Check Cancelled	Sometimes checks Agenda may no longer need to proceed with a check. If the check is cancelled, no charges will be incurred for the check.

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Screening Stages

There are various stages a screening passes through from the screening being requested, right through to the anonymisation of the candidate. Here is a full breakdown of each stage.

Screening Stages	What does it mean?
Screening Requested	This is first stage of the screening journey. The screening has been submitted but the candidate has not yet accessed the portal.
Unsubmitted	The candidate has now accessed their portal and may have provided some information to us, but not yet submitted their details to us.
Candidate did not respond	If the candidate has failed to submit their details to us within the allowed time, which is typically 45 days but can be tailored, the screening will cancelled.
In progress	The screening is in progress. There are various individual check stages that can take place during this time.
Screening Complete	Once all checks have been completed and has undergone the QA Process, the screening will be completed. If you have the completion notifications activated, you should receive an email advising you that your report is ready to retrieve.
Screener Cancelled	Occasionally the candidate may withdraw consent, or you may request we cancel a screening on their behalf. Once confirmed that the cancellation is to take place. This status will show once the cancellation has taken place and you may receive notification of this, if these are activated. Fees may also be payable, depending on what has been actioned so far. This cannot be undone and if the screening is later required, the candidate will need to be resubmitted.
Client Cancelled	You can cancel a screening at any time within the candidate's screening portal by accessing the Actions tab and selecting Cancel Screening. This will automatically cancel the screening in the Screener Portal. This cannot be undone and if the screening is later required, the candidate will need to be resubmitted.

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Reports

There are 6 different types of reports to choose from, that each provide a unique insight into the screening process.

1. **Detailed (Interim)** At any point during the screening you can download a Detailed Interim report. This will show all checks that have been completed, along with their associated documents and information. If the screening has not been completed, selecting Detailed Report will automatically generate the interim.

2. **Summary Report (Interim)** Similar to the Detailed Interim, the summary interim allows you to pull a report on all checks completed, however only showing the summary page.

3. **Detailed Report (End of Screening)** The detailed report contains all the check results as well as all the additional detail provided by the candidate and confirmed by Agenda, as well as documents made available to you. This will automatically be available upon completion of the screening process.

4. **Summary Report (End of Screening)** The Summary Report contains just the check results summary page. This will automatically be available upon completion of the screening process.

5. **Candidate Information Report** The candidate information report contains all the responses to the questions asked of the candidate during the submission process.

6. **Screening Request Report** This report contains all information initially submitted by you, when requesting the screening.

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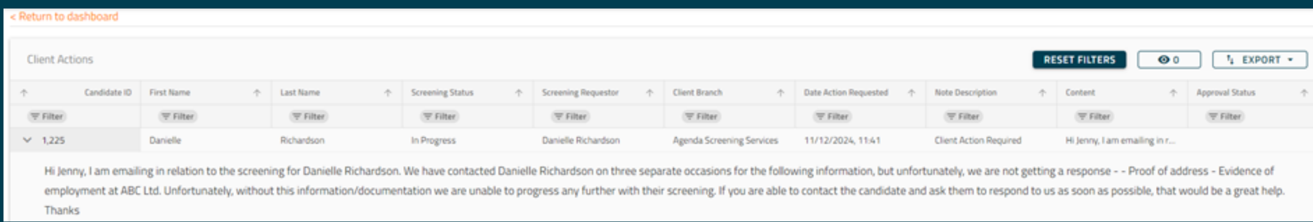
Actions & Communication

Agenda may need to contact you from time to time for a number of reasons, we may need to request information, seek approval for additional costs or just make you aware of something. All these notifications will drop into your Actions tile, which can be found on the first page.

Actions Tile

From the Actions dashboard, you will be able to see a full list of all actions that are currently outstanding for your branch, these can be filtered and sorted in the same way as the other tiles.

There are 2 types of actions, Note actions & Fee approval actions. Note actions can be expanded within the Actions dashboard to allow you to view the content of the action, as pictured.


< Return to dashboard

Client Actions

RESET FILTERS | 0 | EXPORT

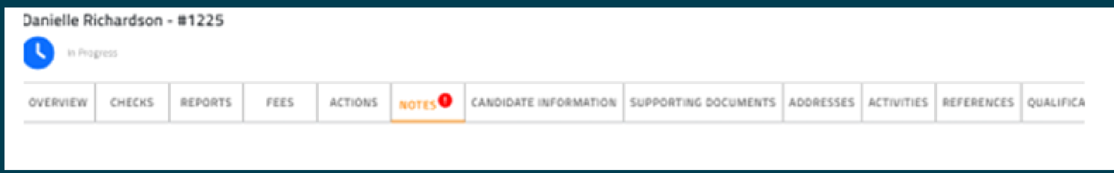
Candidate ID	First Name	Last Name	Screening Status	Screening Requestor	Client Branch	Date Action Requested	Note Description	Content	Approval Status
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
1,225	Danielle	Richardson	In Progress	Danielle Richardson	Agenda Screening Services	11/12/2024, 11:41	Client Action Required	Hi Jenny, I am emailing in r...	

Hi Jenny, I am emailing in relation to the screening for Danielle Richardson. We have contacted Danielle Richardson on three separate occasions for the following information, but unfortunately, we are not getting a response - - Proof of address - Evidence of employment at ABC Ltd. Unfortunately, without this information/documentation we are unable to progress any further with their screening. If you are able to contact the candidate and ask them to respond to us as soon as possible, that would be a great help.
Thanks

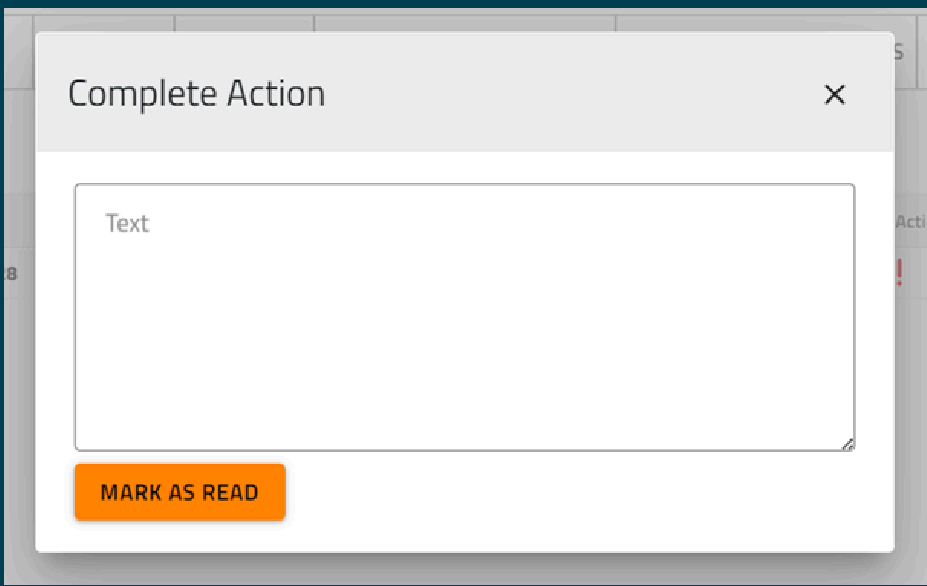
Accessing actions within a candidates screening

1. You can access the candidates screening direct from the Actions Tile. Simply click into the candidate that you wish to visit and it will take you directly to their screening.

2. Once you are in the candidates screening, you will be driven to the notes with an exclamation icon on the Notes or Actions tab, depending on the type of action that is required.



3. Notes are highlighted to you in bolded text with an exclamation mark. Clicking into the note you can then mark this as read. Marking as read will remove the action from the Actions tile.



4. If at any point you would like to add a previously completed action back onto the action list, simply go to the action in question within the notes and mark as unread.

Approving Fees

Approving fees will also appear within your Actions Tile, either approving or declining a fee will remove this action.

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MFA

Most data breaches involve weak default or stolen passwords. According to recent studies:

- 81% of data breaches are caused by credential theft
- 73% of passwords are duplicates

In a recent paper from SANS Software Security Institution, the most common vulnerabilities include:

- **Business email compromise**, where an attacker gains access to a corporate email account, such as through phishing or spoofing, and uses it to exploit the system and steal money. Accounts that are protected with only a password are easy targets.

- **Legacy protocols** can create a major vulnerability because applications that use basic protocols, such as SMTP, were not designed to manage Multi-Factor Authentication (MFA). So even if you require MFA for most use cases, attackers will search for opportunities to use outdated browsers or email applications to force the use of less secure protocols.

- **Password reuse**, where password spray and credential stuffing attacks come into play. Common passwords and credentials compromised by attackers in public breaches are used against corporate accounts to try to gain access. Considering that up to 73 percent of passwords are duplicates, this has been a successful strategy for many attackers and it's easy to do.

Cyberattacks aren't slowing down, and it's worth noting that many attacks have been successful without the use of advanced technology. All it takes is one compromised credential to cause a data breach. This underscores how critical it is to ensure password security and strong authentication.

The implementation of Multi-Factor Authentication (MFA) on the Agenda portal aligns with best practices and can effectively thwart over 99.9 percent of account compromise attacks. MFA significantly increases the difficulty for attackers to gain unauthorised access to user accounts, even if they manage to obtain passwords, thus mitigating the risk of data breaches. This is particularly crucial for organisations involved in recruiting and hiring, given the sensitive personal information exchanged during the process.

The adoption of MFA not only enhances security for Agenda's clients and candidates but also safeguards Agenda itself against potential data breaches. Agenda has adopted this standard across all client services.

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In Portal Messaging and its benefits

ENCRYPTION AND SECURITY

End-to-End Encryption - The Agenda Portal messaging system uses end-to-end encryption, ensuring that messages are encrypted within the portal. This level of encryption is not always standard in email communication.

Secure Access - Access to portal messaging through the Agenda System requires multi-factor authentication (MFA), which adds an extra layer of security compared to traditional email systems. According to Microsoft MFA can block over 99 percent of account compromise. One simple action you can take to prevent 99.9 percent of attacks on your accounts (microsoft.com)

DATA PRIVACY & CONTROL

Centralised Data Management - Portal messaging allows centralised data management, giving better control over who has access to sensitive information and how it is stored and transmitted. The structured nature of portal messaging linked to specific candidate files can simplify the user experience and reduce the likelihood of user errors that can compromise security, such as sending sensitive information to the wrong recipient.

Audit Trails - Portal messaging maintains detailed audit trails, recording who accessed what information and when. This is crucial for compliance and monitoring purposes.

COMPLIANCE

Regulatory Requirements

Portal messaging ensures we comply with specific regulatory requirements, such as GDPR, DPA, and other industry and international specific standards. Compliance features include audit logging, and retention policies.

Data Retention Policies

Portal messaging ensures that data retention and anonymisation policies are followed and can be governed centrally by ensuring that data is retained or deleted in accordance with legal and regulatory requirements.

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In Portal Messaging and its benefits

USER AUTHENTICATION AND ACCESS CONTROL

Strong User Authentication

The Agenda portal offers strong user authentication methods, such as Microsoft B2C and MFA, reducing the risk of unauthorised access compared to standard email systems.

Role-Based Access Control (RBAC)

The Agenda Portal has implemented role-based access controls, ensuring that users only have access to the information necessary for their role. This minimises the risk of data breaches.

PROTECTION AGAINST COMMON THREATS

Phishing and Spoofing

The Agenda portal reduces the risk of phishing, impersonation and spoofing attacks, which are common with email. Users access messages directly through a secure portal rather than receiving them via potentially vulnerable email systems.

Malware and Attachments

The Agenda Portal scans uploaded files and attachments using Microsoft Defender and converts documents to PDF, this neutralises threats embedded in files, reducing the risk of malware infections.

CONTROLLED ENVIRONMENT

Limited External Exposure

The Agenda Portal messaging keeps communication within a controlled environment, reducing the exposure to external threats that are prevalent in email communication.

Automated Updates and Security Patches

The Agenda Portal has regular penetration and vulnerability testing as well as centrally managed patching, allowing for timely updates and security patches, ensuring the system remains secure against emerging threats.

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