

eRailSafe Contractor User Guide

OVERVIEW

This guide has been created to assist you through using the eRailSafe Canada system to be compliant with railroad standards.

The following is required for an applicant to become eRailSafe Canada-Certified:


- An approved background report (no more than 90 days old)
- An approved badge photo
- Completed online training and online testing

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Step 1: Logging In

Go to www.erailsafe.com and click Company Log-In. If it's your first time you will be required to choose security questions and create a password. You can select your language preference before signing or after you sign in on the tool bar.



The screenshot shows the eRailSafe login interface. At the top left is the eRailSafe logo. Below it is a 'Sign in' heading followed by a text input field. To the right of the input field is a large image of several colorful train engines. Below the 'Sign in' heading is a language dropdown menu with 'English' selected, and 'French' as an option. Below the language menu are two input fields: 'Username' and 'Password'. A small note below the password field says 'Password is case sensitive data.' At the bottom left is a red 'Sign in' button. At the bottom right are links for 'Help', 'Forgot password?', and 'Sign up'.

Step 2: Required Tasks

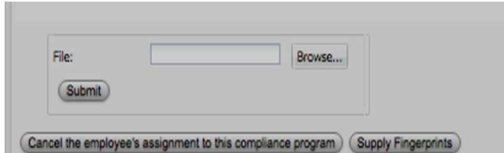
Complete tasks by clicking on them. Remove completed tasks from your list by clicking Complete.

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**-To upload a new photo for the badge, click the applicant's name in the required task list.
- **Recertification** -You will be notified 90 days in advance when an applicant is up for recertification via email and through this required task. If you choose to recertify the applicant, you will be required to upload the below:
 - A new signed Mintz consent form (consent forms are only valid for 3 years). Also include the self-declaration form if the applicant has any criminal history.
 - 2 forms of ID (outlined on page 2)
 - The applicant will need to complete training and testing
- **Upload Self-Declarative**- This task generates to upload the applicant's Mintz consent forms to generate the background report for each applicant.
- **Upload Self-Declarative Incomplete**- This task generates when criminal history has not been added to the self-declaration form. In the legacy system this task was called "Indeterminate Report".

You have 3 options

- **Upload a new Mintz consent form** – The previous reports indicated that there was some unexpected criminal history that did not match what was declared on the consent form. Uploading a new consent form with accurate criminal history will allow complete report to be returned so a decision can be made. This cost is \$34.00 to re-run the report. Once a new run report. Once a new consent form is uploaded, the report will automatically be re-run.
- **Cancel the employee's assignment to the compliance program** – The employee will not be able to receive a badge.



The screenshot shows a file upload form. It has a 'File:' label, an empty text input field, and a 'Browse...' button. Below the input field is a 'Submit' button. At the bottom of the form are two buttons: 'Cancel the employee's assignment to this compliance program' and 'Supply Fingerprints'.

- **Supply fingerprints-** If you believe the self-declaration form was properly completed the first time, you can request a fingerprint report from the RCMP. Mintz will contact your employee directly and arrange fingerprints to be taken. This will allow a full criminal record report to be run and sent to the railroad. The cost is \$50.00 plus any charges from the fingerprinting agency for collecting fingerprints

- **Upload Photo ID 1 and Photo ID 2** - This task generates to upload photo IDs to generate the background report for each applicant.
 - Primary/Photo Identification Standards
 - Driver's License (issued by Canadian province or territory) or Nexus Card
 - Foreign Driver's License
 - Photo Health Card
 - Canadian Passport
 - Foreign Passport
 - Canadian Citizenship Card
 - Permanent Resident (PR) Card
 - Certificate of Indian Status
 - Firearms Acquisition Certificate (FAC)
 - Federal, Provincial or Municipal Identification Card
 - Military Family Identification Card (MFID) o
 - The secondary identification can also be from the above list, for any one of the following:
 - Birth Certificate
 - Baptismal Certificate
 - Hunting License
 - Fishing License
 - Outdoors Card
 - Hospital Card
 - Immigration Papers
 - Canadian Blood Donor Card (only if date of birth indicated)
 - Student Identity Card (if name is shown)

- **Username Notification-** This task generates to provide you with the applicant's username and applicant id. The applicant id is the applicant's password
- **Completed Report Review** – This task generates when background reports are completed
- **Approval-** This task generates 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 the railroad after appealing

Applicant Dashboard

The Applicant Dashboard provides an overview of your applicants' statuses in the program indicate status for each action.

Location:	Demo Account	Applicant Search:	Select to View Active Applicants	Search	Export	
First Name	Last Name	SSN/SSI	Report Status	Report Complete Date	Created Date	Badge Expiration Da
Anyone	Smith	xxx-xx-5217	In Progress			
Jessica	Fonz	xxx-xx-9214	Completed	12/28/2017 10:53	12/28/2017	
Jennifer	Brown	xxx-xx-1234	Completed	01/08/2018 13:57	12/05/2017	
Gunner	Alvarez	xxx-xx-9876	Completed	11/30/2017 20:31	11/30/2017	
John	Jones	xxx-xx-2198	Completed	11/30/2017 20:34	11/30/2017	
Homer	Smith	xxx-xx-3456	Completed	11/30/2017 20:28	11/30/2017	
Jack	Gill	xxx-xx-4732	Completed	11/30/2017 20:28	11/30/2017	
John	Test	xxx-xx-7123	Completed	11/30/2017 20:33	11/30/2017	11/30/2019

- Grey: No action has been taken
- Green: Clear / Approved
- Yellow: In progress
- Red: Failed / Needs Review

The following categories of information for each applicant are visible:



- Report status: "In Progress" if not yet finished, "Completed" in green if approved, or "Completed" in red if it needs review.
- Background check (magnifying glass icon)
- Training (worker icon)
- Testing (screen icon)
- Photo (camera icon)
- Badge (badge icon)

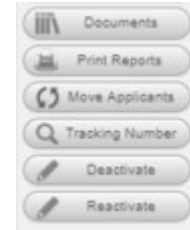
Applicant Actions

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

Step 3: Submitting an Applicant (Individual and Multiple Entry)



Select Add Applicant and click Go. Add your applicant, select their railroad programs and choose your location. If you choose a French program, the applicant's training, testing and report will return in French. Make sure all fields marked with an * are completed. Then click, Save.



Adding an Applicant to a Location

To Add an Applicant First:

Choose the location before clicking Save. The applicant will appear under the specific location.

To Choose the Location First:

Choose the location. Click Add Applicant and fill out information

Applicant 1 of 1:

First Name*: Middle Name:
 Last Name*: Suffix:

Address Line 1*:
 Address Line 2:

Country*:

City*:
 Province*:

Postal Code*:

Gender:

Date of Birth*: Re-Enter Date of Birth*:

Personal Phone: Drivers License:
 Active: Drivers License Province:

Job Title*:

Reference Field:

Programs	Industry
<input type="checkbox"/> Canadian National for eRailsafe Canada	Canadian National for eRailsafe Canada
<input type="checkbox"/> Canadien National pour eRailsafe Canada	Canadian National for eRailsafe Canada
<input type="checkbox"/> Canadian Pacific for eRailsafe Canada	Canadian Pacific for eRailsafe Canada
<input type="checkbox"/> Canadien Pacifique pour eRailsafe Canada	Canadian Pacific for eRailsafe Canada

Location

Location:

Step 4: 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. Save.

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

If you edit first or last name, DOB, you will be charged \$68 for a new background check.

Uploading a Photo

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

Step 5: Bulk Applicant Uploads

To begin a bulk upload, click on the link to download a sample template.

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

Step 6: View Reports

Select the box next to the individual you wish to view. 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
- IN PROGRESS for a report that is pending
- REJECTED for a report with issues

Step 7: 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.

Step 8: Assigning a Program

Select the applicant by checking the box by their name and clicking Programs. Check the box next to the desired program/railroad name, and then click Enroll. You can select more than one applicant at a time.

Enhanced Training and Testing

Assign training and testing by clicking the small triangle next to the appropriate folder. Then select the appropriate program. Testing appears after training is completed.



Program costs (per applicant):

CN programs: \$4

Step 9: Denial Process- Appeal and Dispute

Applicants may be denied to the eRailsafe CA program due to the following reasons:

- Felony conviction within the past 7 years
- Misdemeanor within the past 5 years
- Probation/Parole/Release from incarceration within the past 5 years
- Active warrant
- Any open court case
- A history of crimes of concern
- Permanent disqualifier
- Background check cancelled by contractor
- Out of Service Area—physical address of applicant is far from the rail yard

To file an appeal, select the denied applicant's name. Upload any documentation needed to support the appeal and click Appeal.

Click the railroad 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 in a background report is inaccurate, file a dispute. 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.

Step 10: Reprint Badge

Generating a badge will cause a new badge for the program to be printed and shipped and you will be charged the standard badge fee. If there are additional, Programs that are not yet complete, another badge will be automatically created and shipped when all of those Programs have completed.

Step 11: Print Report

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

Step 12: Moving an Applicant

Click Move Applicant under Applicant Actions.

- Their status must be active.
- They must either: have an active eRailsafe badge OR not be enrolled in any programs.
- You must access them through your company's main account.

Step 14: USPS Tracking

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

Step 15: Deactivating/Reactivating an Applicant

To deactivate an applicant, check the box next to their name and click Deactivate.

To reactivate an applicant, go to Edit Applicant, click the Active checkbox and save

Additional Tasks

eRailsafe System Administrators are reminded to ensure their applicants are updated to warrant compliance and accuracy. As employees are no longer working for your company, or no longer have a need to access Railroad property, eRailsafe Administrators should collect those applicant's eRailsafe badges and adjust their status for the applicants accordingly.

APPLICANT TASKS

Step 1: Retrieve Training and Testing Information

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

Step 2: Applicant Search Status

To search or filter applicants by status, click the *Applicants tab* and then *Applicant Search Status*. Choose the desired status 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.

Step 3: Summary Report

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

Step 1: Managing Users

Select My Account and choose Manage Users. *If you cannot see the add button, hold the button and use the (-) sign to zoom out of 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:

- Vendor Administrator- Full access to all locations and managing users including location administrators.
- Location Administrator Access to manage users for locations, initiate and view background checks.
- HQ Accounts Payable Access to view and pay invoices for all locations (if the account is set up for centralized).
- Location Accounts Payable Access to view and pay invoices for all locations.
- Location Supervisor-
- HR User Access to initiate and view background checks for a specific locations
- HR Viewer Access to view background checks for a specific location.

Step 2: User Info and Role Assignment

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

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 right hand screen. 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 support@everifile.com

Step 3: Adding a Location

Select Locations on the My Account drop-down menu. Click New Location Here.

*To add a general location, highlight your company name and select New Location Here. If you wish to add a sub-location to an existing location, highlight it and click New Location Here.

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 eRailSafe at that location. Then click Save

BILLING

Step 1: View Invoice

To access your organization's invoice, click on My Account and choose My Invoice.

Step 2: Updating Payment Information

Click on My Account and then Update Payment.

MY INFO

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

DOCUMENT LIBRARY

Step 1: Accessing Your Library

You can upload documents required for your users with unlimited storage space. Click My Account and then Document Library.

Step 2: Uploading Your Documents

Click Add Document. Select a system folder and document type. Click Save. Document Library Step 3: Viewing and Printing Your Documents To view a document, select its folder and then click it. To print, right click your mouse and select Print.

Step 4: Deleting Your Documentation

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