# Managing your Check Applications

This guide looks at how to manage checks that have yet to be submitted for processing, this could be because they are yet to be submitted to the candidate to complete their online consent form or when the check application is still being drafted (AO has clicked save, to finish the application at a later stage).

Tracking Check Progress

Let's start by looking at the check tabs in the *fit2work* portal; these indicate what stage of the process a check application is currently in. From the *fit2work* dashboard homepage you will see that checks are split into the following categories:
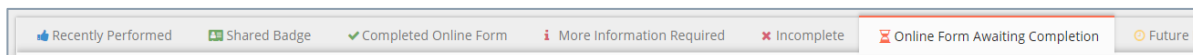
This table indicates what stage the checks within that tab are currently in and what actions can be completed by an Authorised Officer as a result.

Tab Name	Description	Action Menu
Recently Performed	The Recently Performed tab shows a list of all the checks which have been recently performed. This includes the Applicant Name with the Check Reference Number, the Submission Date, the Status and the Authorised Officer Account it was created under.	Once the check has been performed the application can be archived. By clicking the archive icon a message will appear asking you if you want to confirm this action. To access archived information you search for it via the 'Search' tab. ***Note:*** *all checks are automatically archived after 28 dates. Archive time can be customised.*
Shared Badges	These are checks that have an outcome based on the verification results held on the *fit2work* database in accordance with the badge held by the candidate.	There are no actions available for AOs other than clicking the candidate name to view their personal details, clicking the checks to view the results.
Completed Online Form	When an applicant has been sent an invitation to complete a check, and they have successfully submitted it, the check will be placed in the Completed Online Form tab.	These checks are ready to be reviewed - to verify that the candidate has supplied all the information accurately and in a compliant manner - by a *fit2work* operative (managed accounts) or an Authorised officer within your Organisation that has the appropriate access levels (for unmanaged accounts).

More Information Required	There are two sections within this tab. **More Information Requested** These are checks that applicants have completed and have been reviewed by *fit2work* or AOs; however, more information is required from the applicant to submit the check for processing hence *fit2work* or the AO have requested these additional details or documents from the applicant **More Information Provided** This section holds the checks where applicants have resubmitted their application with the additional details or documents that were requested of them. These applications will need a final review by *fit2work* or your Organisation AOs before being submitted for processing.	**More Information Requested** For the checks that require more information, you can delete the check, edit the check and also send a reminder to the candidate to provide the additional required information. **More Information Provided** For the checks where more details have been provided you can click the pencil icon to complete the check and submit for processing.
Incomplete	These are checks that have been created but have yet to be sent to the applicant or are in draft. ***Note:** Checks that have been created by clicking the 'The applicant has completed a hand-written consent form.' will appear in this folder.*	Here you can delete the draft check or click the edit icon to complete the application.
Online Form Awaiting Completion	These are the checks that have been sent out via email invitations and are awaiting completion from the applicant.	Here you can delete the check or send the candidate a reminder email to log into the applicant portal to complete their application.
Future Dated *(self-managed accounts only)*	If your organisation has this function enabled on their account, all the checks that have been future dated will be shown in this tab. Enabling Future Dates means that you can complete your review of applications and instead of submitting it then, you can choose to input a future date that these checks will be submitted for processing. These could be renewal checks.	As an Authorised Officer, you have the option of viewing the details of the check by clicking the View button.

The applicant's checks are displayed as a group linked to the applicant, so when an application is made up of multiple checks they may be at various stages of completion. This will mean that the application may appear in multiple check tabs.

Example: In the screenshot below, there is an application where three checks were ordered for one candidate, two have been completed and have a Match or No match found status. The Directorship Check requires further information from the candidate in order to be processed:
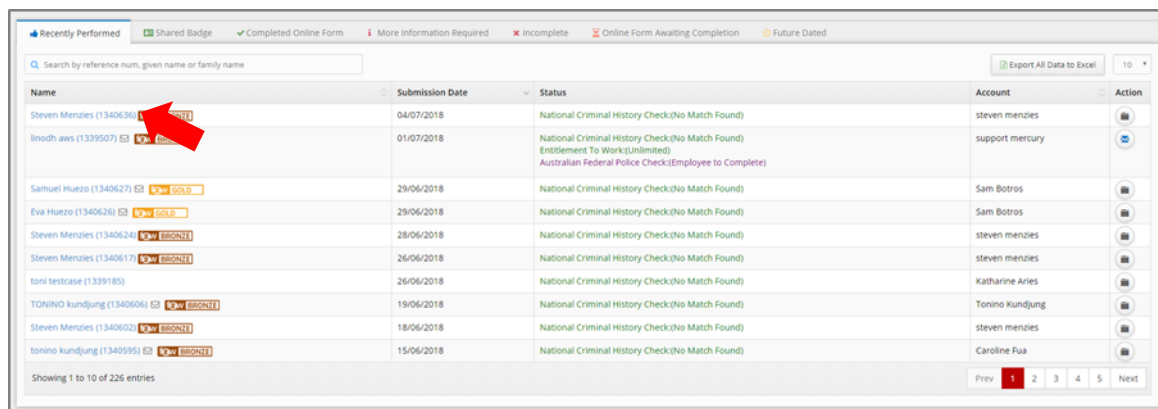
Checking Application Details

You can check the details of an application simply by clicking on the applicant name and application number. You can also use the search bar to locate an application using the *fit2work* reference number or the applicant's name.

A pop-up window will appear that is made up of three tabs.

Persons Details: This give the basic details for the candidate; the details of any checks requested any ID or consent that has been uploaded:
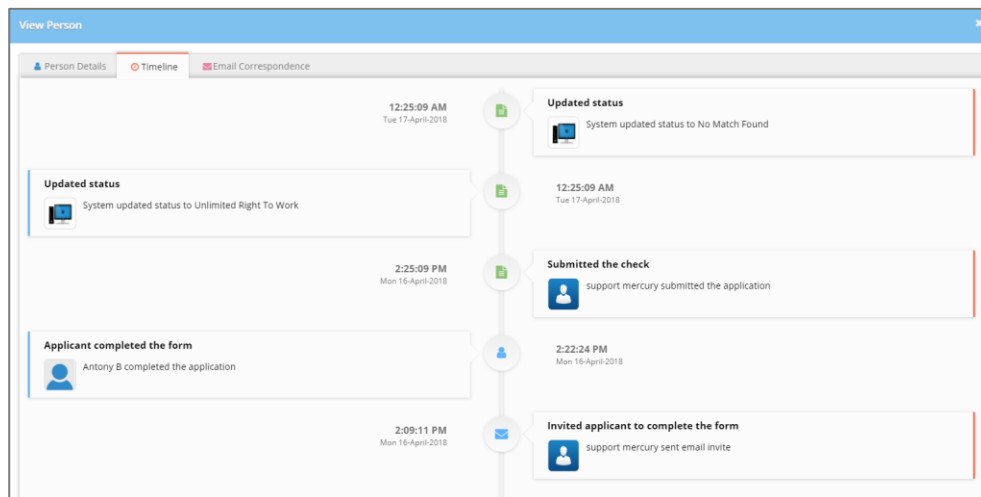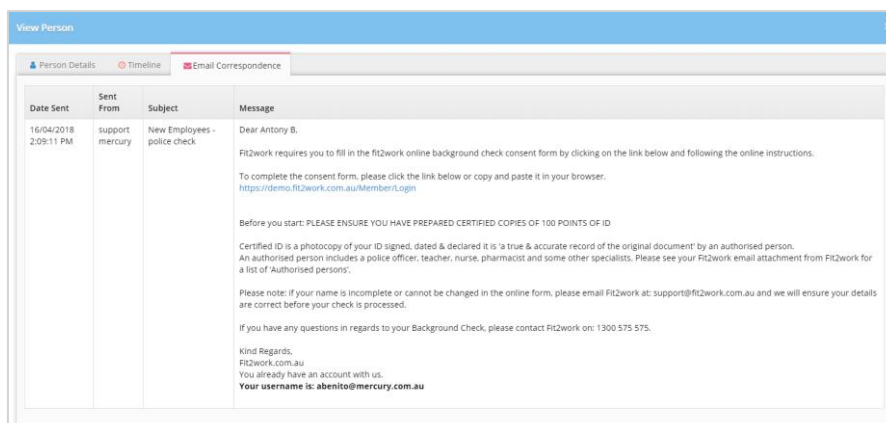
Timeline: This is a log on any application activity, including system, AO, *fit2work* team actions or activity from the Candidate:

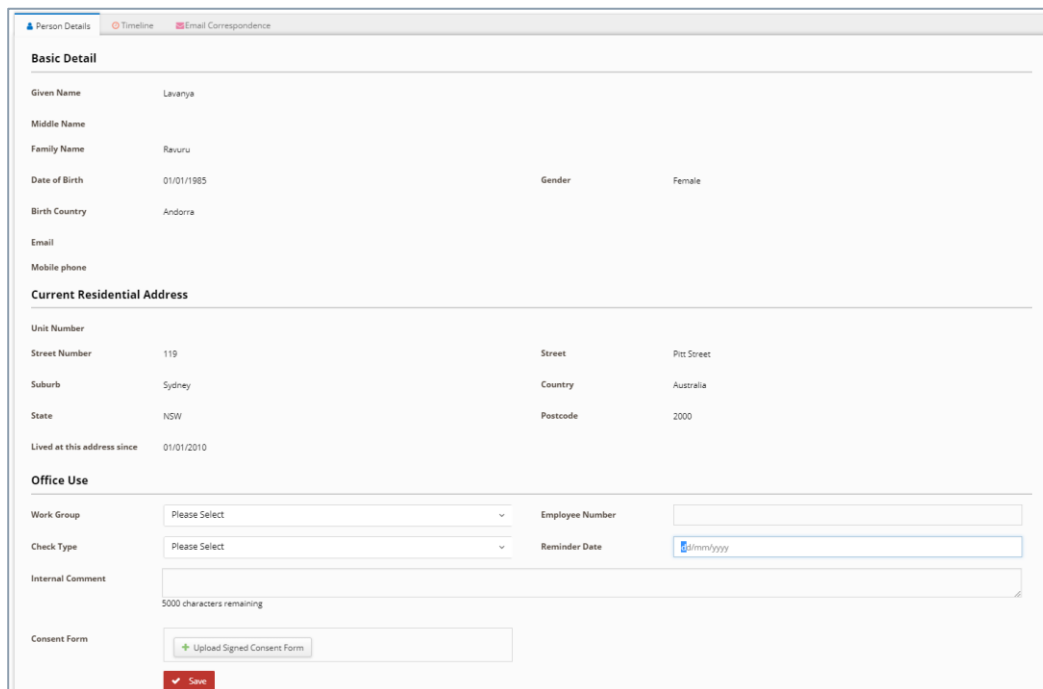**Email Correspondence:** This is a log of any email communication to the candidate sent from the *fit2work* system:

Setting a Reminder Date for Re-Checking

fit2work can send you an email reminder of a police check that your organisation may deem to require a renewal in accordance with your HR policies. This way you can keep track of checks conducted and their intended renewal dates.

1. Click on the name of the applicant you wish to set the reminder for in any of the tabs, and a window will open with all the information that has thus far been entered into the application.

2. Click the 'Reminder Date' field under Office Use. A calendar will appear; select the date for the reminder. The date will appear in the Reminder Date box.

3. Click on the Save button and this will save any changes made.

4.The reminder email will be sent to you one month in advance of the reminder date to alert you that actions are required for this check.

When you go to process the reminder check you must obtain new consent from the applicant to do so. The applicant must complete a new *fit2work* Police Check Consent Form or online application to provide their consent.
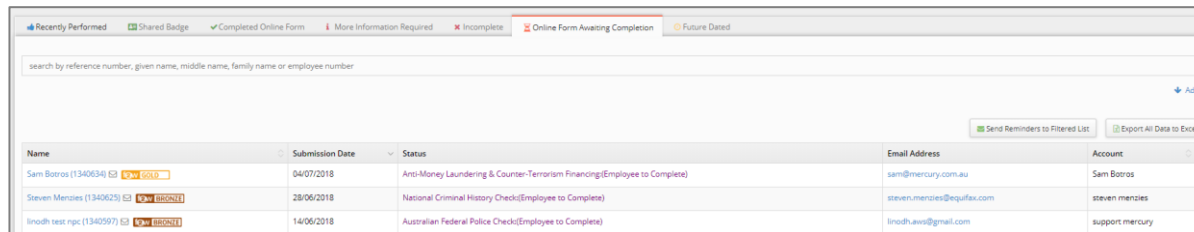
Send Email Reminder to Applicant to Complete a Check

For applicants who have been sent an online invitation to complete a check, an email reminder can be sent via your *fit2work* portal.

1. Click the Online Form Awaiting Completion tab at the top of the Home Page.

2. A list of all checks that applicants have not submitted will come up. Find the applicant you would like to send a reminder email to and click on the envelope icon located to the right-hand side of the screen under the Action column.

3. The system will then send out a reminder email containing the *fit2work* link to the applicant who is yet to complete their application.

4. Send Reminders to Filtered List: This button can be clicked to send reminder emails to all applicants whose checks are awaiting completion. Alternatively, you can select specific groups of checks to send reminder emails for, by clicking on the Advanced Search button and applying the relevant filters.
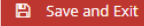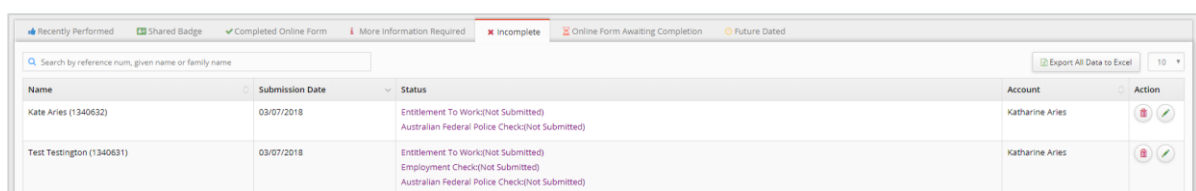

Automated - Reminders for applicants to complete checks

Should you or your organisation prefer automated reminders, *fit2work* can send reminders to all applicants whose checks are not finalised at a frequency nominated by you.
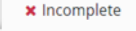
This will apply to all unfinished checks within the account within the Online Form Awaiting Completion tab. Please speak to our support team or contact your Account Manager to activate Automated Reminders.

Completing Incomplete Checks

If you wish to save an application to complete later, you can click [Save and Exit] at any stage of the application process, this will save the details entered on the application and you can choose to continue working on the application or exit out of the *fit2work* portal.

Once saved, the incomplete check will appear under the [x Incomplete] tab. To resume with submitting the check you can click the icon found on the right-hand side of the screen in the action options.

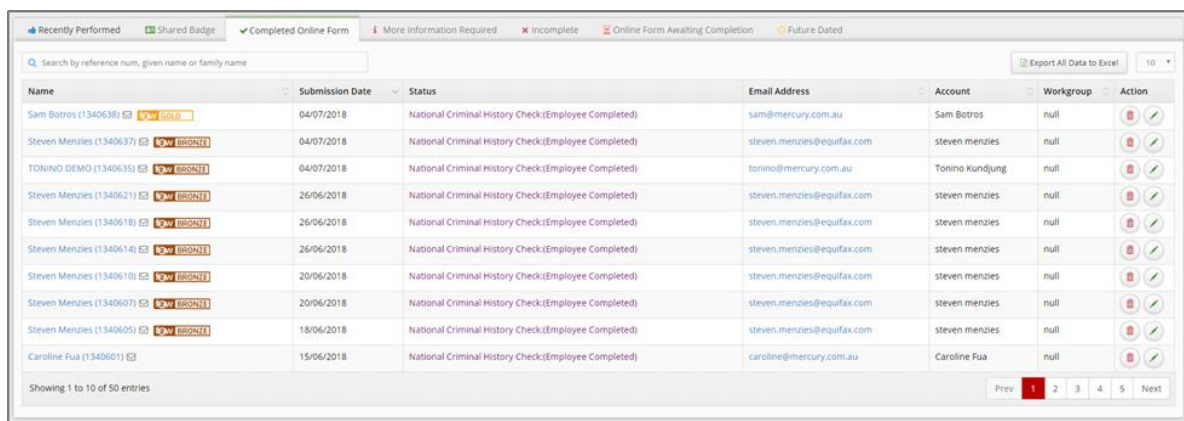If you no longer wish to proceed with the check, you can press the icon and this will remove the application from the system.

Verifying Candidate Information and Submitting Checks

If you manage the check applications in-house (Self-managed account) once the candidate has completed their application online, the check will move into the Completed Online Form tab where you can view and verify the information they have provided and submit the check.

Note: Managing checks in-house means the *fit2work* team do not verify and submit checks on your behalf, once the candidate has provided the necessary ID and consent. If you would like to discuss *fit2work* verifying and submitting your checks, please contact your Account Manager.

You may also receive an email notification once the check is ready to be verified (i.e. the candidate has completed their check online) – this is a function that is set up during account creation. If you do not receive these notifications but would like to, contact your Account Manager.

To verify and check the application click the Complete icon ✏ located on the right-hand side of the screen under the **Action** column. You will then be directed to the application page.

It is the Authorised Officer's responsibility to ensure the correct information has been entered for applicants and that the ID provided meets processing requirements.

If the applicant is missing information, you can use the *More Information Required* function at the bottom of the page to send the applicant an email request for further information or documentation.

Once this option is actioned, the check will be moved to **"More Information Required"** tab.

Once you are ready to process the check, select the **Next** icon.

You will then be directed to the review page. Before submitting the applicant's check please ensure all the correct information has been entered for the applicant. **Checks that have been submitted with incorrect information will need to be submitted again and your organisation will be charged the full amount for the additional check.**

After reviewing the information, you can select the **Save and Exit** icon to save the application or click the **Submit Check** icon to send the check for processing.