

Experian VerifyTM for Government Access Web Portal First Time User Guide





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Client Set-Up



Experian Verify Access Web Portal Client Set-Up

Client Care Set-Up:

Upon contract execution, Client will work with Experian Client Care to set up the Experian Verify product within Access, including Permissible Purpose type designation and Origin products settings:

Product Name: Experian Verify Access Web Portal (Product Suite)

- Product Options:
- Experian Verify Plus
- Experian Verify Premium
- Experian Verify Core
- Experian Reverify
- Experian Verify for Employment Screening
- Experian Verify for Government
- Experian Verify Borrower Statement

Registration and Login/Security Designates:

All information on how to set up users can be found in the Origin Security Designate Guide which will be provided by your Experian Verify Delivery Manager.



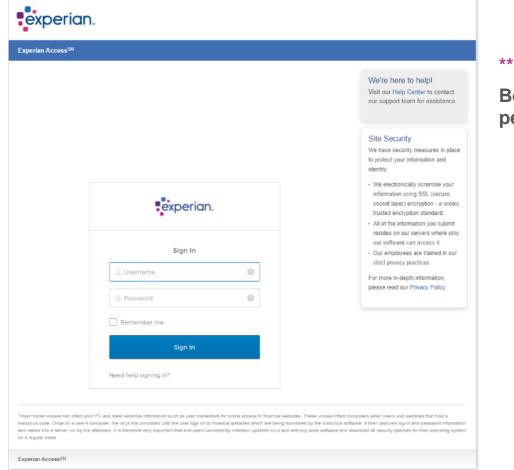


Log-In Page



Experian Access Login Page

www.experian.com/access



Note

Before logging in you must have setup your permanent password.





Navigation



Navigation

- Home / Dashboard
- Products list of available products for the user that is logged in
- Archives access to usage and archive reports access can be limited based on how the Head Designate or Security Designate set-up the user
- Preferences ability to set certain viewing preferences within Access







Home/Dashboard



10/19/2023 Public Experian Access First Time User Guide

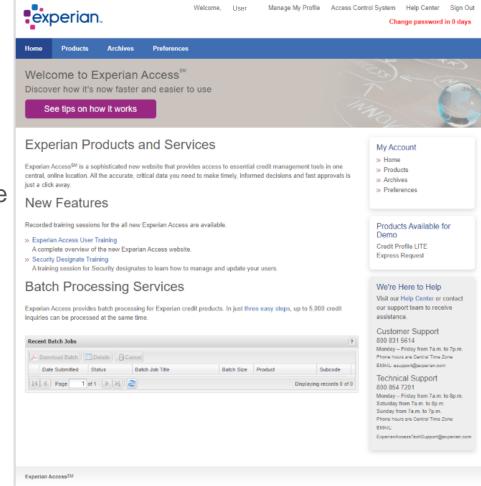
Home / Dashboard

Features

Links to recorded Experian Access training sessions via each product or the "Help Center" on the right-hand side of the screen.

Batch Dashboard

Download recent batch jobs from the "Home" tab.







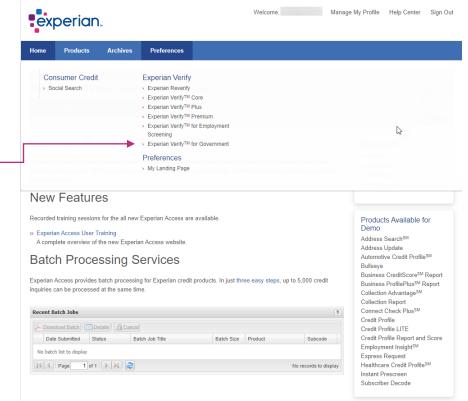


Any Access user can go to Preferences to select a specific product to appear on their landing page.

For Security Designates, there are certain preferences that can be set for all users at a subcode level.

For Security Designates only, under Preferences > Select the product in which you would like to set preferences:

➤ Experian VerifyTM for Government





Upon selecting a product type:

Step 1: Inquiry Details

Billing Information:

 Access Subcode assigned during onboarding process will appear in drop-down to select

Step 2: Select which purpose types to display

Available Purpose Types

Select purpose types in this section to be displayed on the input inquiry page

Selected Purpose Types

 Selected purpose types will be displayed in this section

Select the purpose type you would like to appear as the default in the drop-down menu (optional)

Experian Verify for Government

is New Inquiry

Please provide the information requested below. Fields marked with an asterisk (*) are required.

* Access Subcode: 1234-XYZ	Set as default
EP 2: Select which purpose types to display	Selected Purpose Types
select all	clear selections
00 - Auto Loan 01 - Unsecured Loan 02 - Secured Loan 03 - Partially secured Loan 04 - Home improvement Loan 05 - FHA home improvement Loan 06 - Installment sales contract 07 - Revolving charge account 08 - Real estate (unk type) (term in yrs) 09 - Loan secured by co-signer 0A - Time share Ioan	75 - Government Benefit
Select the purpose type you would like to app 75 - Government Benefit	ear as the default in the drop-down menu (optional):
P 3: Configure your preference settings for the	

Apply these settings to all my Subcodes

Save Changes Default Settings



Step 3: Configure your preference settings for the following features and options

Choose any of the following preferences:

- Disable Batch
- Set Custom Label Name #1 and Value #1 as Mandatory

Once a preference is selected, the setting will be applied to all users in the sub-code selected in Step 1.

Experian Verify for Government

🔄 New Inquiry

Please provide the information requested below. Fields marked with an asterisk (*) are required.

	Set as default
	Selected Purpose Types
	clear selections
	75 - Government Benefit
	_
+	1 1
-	
as the de	efault in the drop-down menu (optional):
	~
owing fea	atures and options

Set Custom Label Name #1 and Value #1 as Mandatory

Apply these settings to all my Subcodes

Save Changes Default Settings





Products

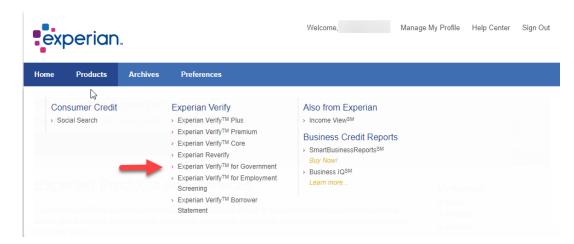


Products

Click on the tab to show a list of available products for the user that is currently logged in to the system.

Under Experian Verify, click on the product type you would like to view:

➢ Experian Verify[™] for Government







Experian Verify[™] for Government



Experian Verify for Government Inquiry Input Page – continued

Upon clicking on the Experian Verify for Government product within the Products menu, an Inquiry Input Page will display.

Step 1: Customer Information

Billing Information:

 Access Subcode assigned during onboarding process will appear in dropdown to select

Account Information:

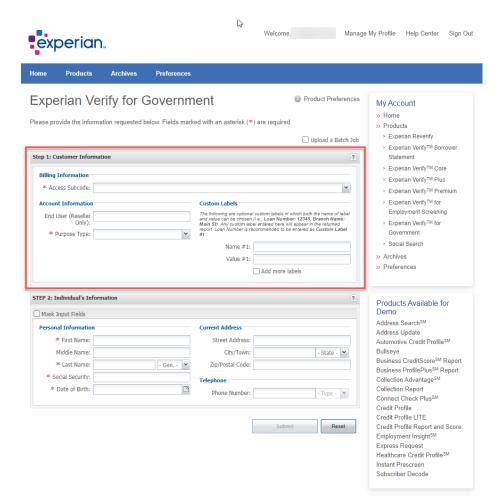
End User (Reseller Only) – If Client is a Reseller and the End User of Reseller is not identified in the Client's Unique Subcode, Reseller must type End User name here (i.e., ABC Government)

Purpose Type:

During onboarding process, Client will be assigned permissible purpose types allowed for program and select the specific permissible purpose type in this drop-down. NOTE: If an unapproved permissible purpose type is chosen for the program, an error message will appear.

Custom Labels:

Client can choose up to 5 option custom labels. Both the name of label and value can be chosen (i.e., Loan Number: 12345, Client Reference ID: 123456789). Any custom label entered here will appear in the returned report. Clients who are set up for Invoice Format #4 will see the value for Custom Label #1 appear in their invoice.





Experian Verify for Government Inquiry Input Page – continued

Upon clicking on the Experian Verify for Government product within the Products menu, an Inquiry Input Page will display.

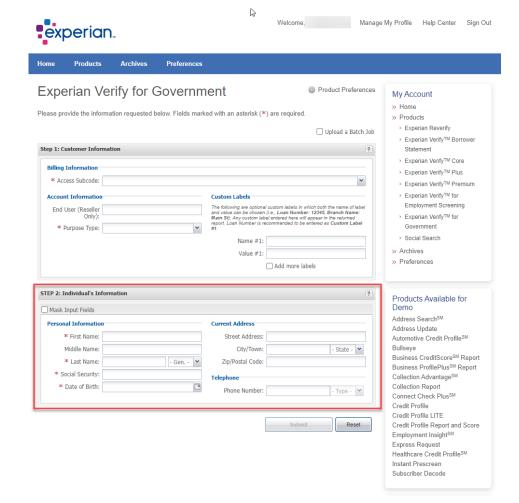
Step 2 : Individual's Information

Personal Information:

Required: First Name, Last Name, SSN and DOB

Current Address & Telephone:

Optional: Street Address, City/Town, State, Zip Code and Telephone





Experian Verify for Government – HTML Output

Personal Information

Name, SSN, DOB and Address returned from data source

Employment History

Request	Details
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Requestor-Subscriber Name

Requestor ID- Subscriber Code

Report ID – Unique ID assigned by Experian for each report

Report Type - ExpVerify-Gov

Date Requested – Date report requested

At the Request Of – Name of End User (if Reseller)

Income/Employment Details:

Experian Verify for Government returns 6 previous months of paystub details from the date the report is requested (regardless of work status) and YTD totals for current year and 2 previous calendar years. Pay record must be found on at least 1 employer in the last 120 days in order to return a report.

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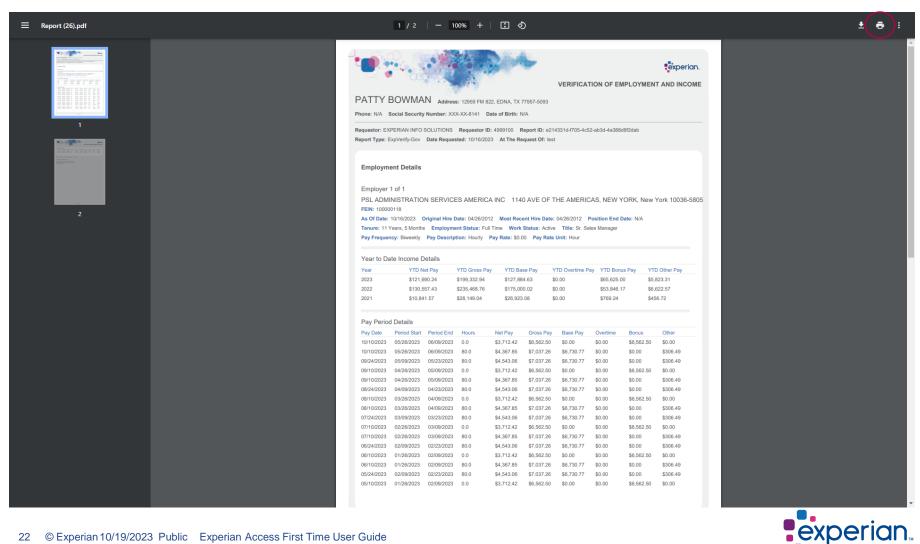
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Experian Verify for Government— PDF Report

Download to save or print





Bulk (Batch) Process

NOTE: This process is a transactional process with a 5K input limit. This is a separate process to the Verify Batch service, which is a secure file transfer process with unlimited input capacity.



Experian Verify – Bulk (Batch) Inquiry Input Page Experian Verify for Government

For Bulk (Batch) Jobs, click on the "Upload a Batch Job" on the Inquiry Input Page.

Up to 5K inquiries can be processed at the same time.

Upon checking this box, Step 2 – Batch Services will appear.

Job Title: Enter name of job

<u>Upload .CSV file:</u> Hit browse button to find and upload input file.

Batch Output Options:

- Choose File Format: PDF and/or CSV
- If PDF is chosen, choose between individual files or single file for Output Format. CSV is only delivered in a single file.

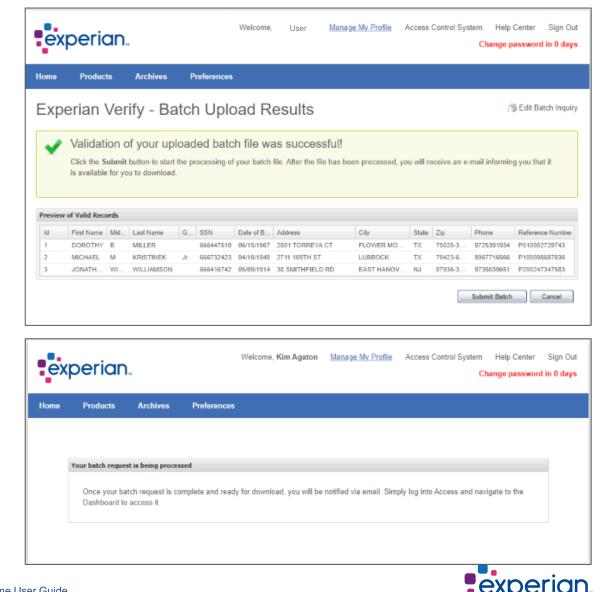
Experian Verify for Government	^s My Account
	» Home
Please provide the information requested below. Fields marked with an asterisk (*) are required.	» Products
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End User (Reseller	Employment Screening
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	Social Search
STEP 2: Batch Services ?	>> Archives
STEP 2: Batch Services	» Preferences
Batch Services Batch Output Options	
* Job Title: * File Format: 🗹 PDF	
* Upload .CSV File: Browse	Products Available for
File contains a column header row Output Format: Individual Files	Demo Address Search SM
○ Single File	Address Update
	Automotive Credit Profile SM
CSV Format	Bullseye
Sample CSV File	Business CreditScore SM Report Business ProfilePlus SM Report
Batch Notes: The uploaded file's header is optional. 	Collection Advantage SM
 The following are optional custom labels in which both the name of label and value can be chosen (i.e., <i>Client Reference ID: 123456789</i>). Only <i>Custom Label #1</i> will appear in your invoice reporting. 	Collection Report
 Data not formatted correctly may impact hit rates. For example, DOB must be in mm/dd/yyyy format ONLY and SSN must be in ### ## ##### or ######################	Connect Check Plus SM
 Address fields must include a combinations of "Address + City + State" OR "Address + Zip Code." 	Credit Profile Credit Profile LITE
Please follow the fields order listed below:	Credit Profile Report and Score
1. Inquiry ID	Employment Insight SM
2. First name	Express Request
4. Last name	Healthcare Credit Profile SM
 Generation code (Optional) Social Security Number (e.g. ###-##-##### or #########) 	Instant Prescreen Subscriber Decode
 Date of birth (e.g. mm/dd/yyyy) Street address (Optional) 	
9. City / Town (Optional)	
10. State (Optional) 11. Zip code (Optional)	We're Here to Help
12. Phone number (Optional) 13. Phone type (Optional)	Visit our Help Center or contact
14. Reference Number (Optional)	our support team to receive
15. Custom Label Name 1 (Optional) 16. Custom Label Value 1 (Optional)	assistance.
17. Custom Label Name 2 (Optional) 18. Custom Label Value 2 (Optional)	Customer Support
19. Custom Label Name 3 (Optional)	800 831 5614
20. Custom Label Value 3 (Optional) 21. Custom Label Name 4 (Optional)	Monday – Friday from 7a.m. to 7p.m. Phone hours are Central Time Zone
22. Custom Label Value 4 (Optional)	EMAIL: esupport@experian.com
 Custom Label Name 5 (Optional) Custom Label Value 5 (Optional) 	Technical Support
	800 854 7201
	Monday – Friday from 7a.m. to 8p.m. Saturday from 7a.m. to 8p.m.
Submit Reset	Saturday from 7a.m. to 8p.m. Sunday from 7a.m. to 7p.m.



Experian Verify – Bulk (Batch) Upload Results

Upon uploading .CSV file and hitting submit, a Validation message will appear to confirm file has been uploaded successfully. A preview of valid records is available to view before hitting "Submit Batch" button.

After hitting "Submit Batch" a message that your batch request is being processed will appear. You will be notified via email once the request is completed to log in to Access and navigate to the Dashboard to access results.



Experian Verify– Dashboard for Bulk (Batch) Jobs Welcome. User Manage My Profile Help Center Sign Out

Batch Jobs will appear upon logging in to the Access Home Page, with a status of Pending, In Progress, Completed or Ready

To Download the Batch Job, click on the checkbox next to the job and hit "Download Batch" to download CVS and/or PDFs

experian



Experian Products and Services

Experian Access® is a sophisticated new website that provides access to essential credit management tools in one central, online location. All the accurate, critical data you need to make timely, informed decisions and fast approvals is just a click away.

New Features

Recorded training sessions for the all new Experian Access are available

» Experian Access User Training

A complete overview of the new Experian Access website

Batch Processing Services

Experian Access provides batch processing for Experian credit products. In just three easy steps, up to 5,000 credit inquiries can be processed at the same time.

eo	ent Batch Jobs					
		(maria life				
	Date Submitted	Status	Batch Job Title	Batch Size	Product	Subcode
	07/09/21 11:23	Downloaded	EV-Core-EchoFiexed	10	Experian Verify Core	4999100
	07/09/21 11:22	Downloaded	EV-Premium-EchoFixed	10	Experian Verify Premi	4999100
	07/09/21 10:20	Downloaded	EV-Plus-CSV-EchoFixed	10	Experian Verify Plus	4999100
	07/08/21 02:41	Downloaded	EV-Core-PDF-CSV-Single	10	Experian Verify Core	4999100
	07/08/21 02:40	Downloaded	EV-Core-PDF-CSV-Indv	10	Experian Verify Core	4999100
	07/08/21 02:39	Downloaded	EV-Premium-PDF-CSV-Single	10	Experian Verify Premi	4999100
	07/08/21 02:38	Downloaded	EV-Premium-PDF-CSV-Indv	10	Experian Verify Premi	4999100
	07/08/21 02:34	Downloaded	EV-Plus-PDF-CSV-Single	10	Experian Verify Plus	4999100
	07/08/21 02:32	Downloaded	EV-Plus-PDF-CSV-Indv	10	Experian Verify Plus	4999100
	07/08/21 02:29	Downloaded	EV-Core-CSV-Only	10	Experian Verify Core	4999100
	07/08/21 02:27	Downloaded	EV-Premium-CSV-Only	10	Experian Verify Premi	4999100
	07/08/21 02:25	Downloaded	EV-Plus-CSV-Only	10	Experian Verify Plus	4999100
	07/08/21 09:13	Downloaded	EV-Core-PDF-CSV-Single	10	Experian Verify Core	4999100
	07/08/21 09:11	Downloaded	EV-Core-PDF-CSV-Indiv	10	Experian Verify Core	4999100
	07/08/21 09:07	Downloaded	EV-Premium-PDF-CSV-Single	10	Experian Verify Premi	4999100
	07/08/21 09:05	Downloaded	EV-Premium-PDF-CSV-Ind	10	Experian Verify Premi	4999100
	07/08/21 09:04	Downloaded	EV-Plus-PDF-CSV-Single	10	Experian Verify Plus	4999100
	07/08/21 09:02	Downloaded	EV-Plus-PDF-CSV-IND-July08	10	Experian Verify Plus	4999100
	07/07/21 05:48	Downloaded	EV-Core-PDF-CSV-Single	10	Experian Verify Core	4999100
	07/07/21 05:47	Downloaded	EV-Premium-PDF-CSV-Single	10	Experian Verify Premi	4999100
	07/07/21 05:45	Downloaded	EV_Plus-PDF-CSV-Single	10	Experian Verify Plus	4999100
	07/07/21 05:44	Downloaded	EV-Core-CSV	10	Experian Verify Core	4999100
	07/07/21 05:43	Downloaded	EV-Premium-CSV	10	Experian Verify Premi	4999100

My Account » Home

- » Products
- » Archives
- » Preferences

Products Available for Demo

Address Search[™] Address Update Automotive Credit Profiles Bullseye Collection Advantage⁵⁵ Collection Report Connect Check Plus⁸⁷ Credit Profile Credit Profile LITE Employment Insight^{5N} Express Request Healthcare Credit Profiless Instant Prescreen Social Search Subscriber Decode

We're Here to Help

Visit our Help Center or contact our support team to receive assistance.

Customer Support 800 831 5614 Monday - Friday from 7a.m. to 7p.m. Phone hours are Central Time Zone EMAIL: esupport@experian.com

Technical Support 800 854 7201 Monday - Friday from 7a.m. to 8p.m. Saturday from 7a.m. to 8p.m. Sunday from 7a.m. to 7p.m. Phone hours are Central Time Zone EMAIL: ExperianAccessTechSupport@experian.com





Archives



Archive and Usage Reporting



Based on Origin settings configured by Client Security Designate, users will be able to access archived reports either for self only or other users under the same subcode.

Archived Reports:

- Date range options up to 90 days
- Ability to view the actual report delivered

Usage Reports:

- Usage reports can be created in PDF or .CSV
- Shows list of reports delivered, with option to view an actual report if 90 days or less
- Date range options up to 1 year
- Typically used for billing reconciliation purposes

chive Search						
Date Range			Search Results			
* Time Period:	6 Months	¥	* Sort By:	Date		~
Product Criteria			Time Format:	12HR	🔿 24HR	
Product:	All Products	v	Applicant Informatio	1		
Reference Number:		T	First Name:			-
Company Information		1	Last Name:			-
	All Subcodes		Social Security:			
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Testing in UAT



Testing in UAT

Clients can use STARSM Test Accounts to view sample responses for any report type in the UAT environment.

To request STARSM Test Accounts, please reach out to your Account Executive (AE).

Upon selecting a report type, testing in UAT can be done by selecting the "**STAR 2000 Database Demo Method**" in the Access Subcode drop down menu in *Step 1: Customer Information*. Once selected, DEMO will appear in the background to confirm you are in the UAT environment. Enter test PII data from any STARSM Test Account in the list provided by your AE and hit "Submit" to view sample responses.

WARNING – PLEASE READ THIS STATEMENT IN ITS ENTIRETY.

The FCRA does not allow testing in production for any reason. Experian has a zerotolerance policy regarding testing in production, and it is an actionable offense.

Penalties for Non-Permissible Production Access

• Actual damages claimed by the consumer or \$1,000, whichever is greater

Punitive damages as a court may allow; action costs and attorney's fees

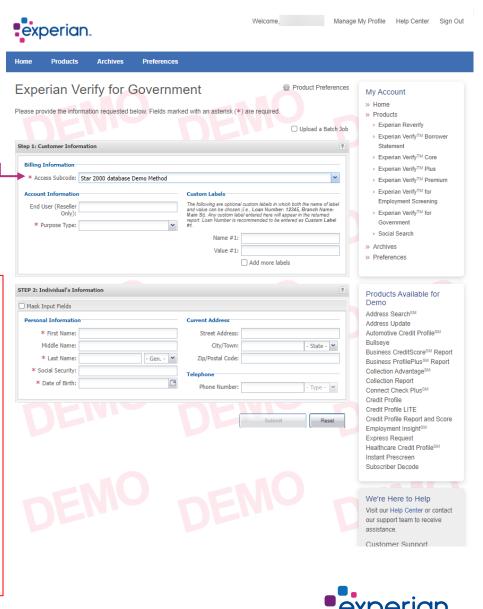
• Penalties for non-permissible access such as testing (false pretenses)

• \$3,500 and or imprisonment (up to 2 years) or both

Experian provides one test case for connectivity testing purpose only.

Never use any STARSM test cases in production. Never make up your own test case and point to production. Failure to follow this policy can ultimately result in harm to an actual consumer and legal action.

If you are unsure if you are pointing at production or our test system, please do not submit your inquiry. Contact your developer or your Experian technical contact for assistance.





Additional Resources/Contacts





Additional Resources/Contacts

Experian Access Help Center: https://www.experian.com/access/help-center.html

Experian Verify Access Customer Technical Support:

Contact Email:

- <u>experianverifysupport@experian.com</u>
- Monday Friday
- 8am 5pm US CT

Contact Phone (Emergency Support -24/7):

• (800) 854 7201 Option 3





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10/19/2023 Public Experian Access First Time User Guide