KeepnTrack:
Background Checks

This video goes over setting up and running KeepnTrack Background Checks.

Permissions

In order to run KeepnTrack Background Checks, the operator must be assigned a security group with the appropriate permissions.

Log in to your administration and go to Tools, Security. Click on a Security Group on the left, and unlock the record. There is an option for Criminal Background Checks—if checked, people with this Security Group can run KeepnTrack background checks.

In Person Management, locate the person you want to be able to run those background checks. In this case, he is assigned to the Operator Security Group, which does not allow background checks. I can change the Security to Administrator, which will give this person permission. *However*, it will also give him permission to do the other things Administrators are allowed to do.

So if that isn't going to work for you, you could create a new Security Group, for example Admin-CBC (for criminal background checks), to indicate someone of Operator level who is allowed to run background checks, (but perhaps not these other things), then assign your person to that special security group.

Tokens

In order to run background checks, you will need available tokens in your account. Each check takes one token.

Log in as an operator who has Background Check permissions.

To see your remaining checks, go to your People records and select a record. Click on the Checks tab. You will see Tokens Remaining.

To purchase more tokens for your account, please contact our Sales Department (1-800-347-6439).

NOTE: Running another check on the same record within 24 hours will perform the same check and not use a token.

Running Checks: People

You can perform background checks on any Person records or Application records on your account, but they **must have the birthdate** entered in the record.

Select the record. Check under the Overview tab that the birthdate is entered. Click on the Checks tab, and there is a button to Perform Background Check.

After a few moments, you are presented with a list of possible matches. The information you are checking is on the left, the list of possible matches is in the middle, sorted by Offense Category, and the details of the selected possible match are on the right.

You can use the arrow keys to move up and down in the list, and check the relevant information.

When you have finished looking through the results, it’s time to make a determination. Press Finish and Set Access.

Has this person passed their background check? Select Allow Access—Passed, which will allow this person entry into your system by setting their status to Active.

Did this person *fail* their background check? Set their status to Access Denied so they can not sign in to your facility.

Are you unsure about this person? Perhaps you can't determine if a record matches, or if an offense is serious or minor, and you need to follow up with someone else. In this case, choose Defer, which sets the Background Check status to 'Deferred'; you can easily find Deferred records at a later time.

Notes—enter any notes about your determination, for example the case number or any questions you might have had. These notes will be available in the background check history.

Make your selection, enter your notes, and click Continue to save those results to the person's record.

Running Checks: Volunteers

Running background checks on your volunteer applications will be slightly different, because these records are not officially 'person' records in the database. When you Finish a background check from Applications, you have the same options to mark the Background Check as Passed, Failed, or Deferred, but the person's status will NOT be set until their application is accepted or rejected. When you reject an application you have the choice to make that person Access Denied.

Running Checks: No Results

For both people and volunteer applications, it's possible there won't be any potential matches. In this case, you are still presented with the same window so you can choose if the person passed or failed their check.

History

From any person or application record you can see the Background Check History; the date, operator, results, the check, and any notes.

Other Background Checks

If you use a different database to run background checks, you can still mark the background check status in KeepnTrack. Click the status to change it; these manual changes are also recorded in background check history.

Reports

You can also run a report to see previous background checks and token usage. From Tools, open Reports. Under the Special category, click on Background Checks, and you can run a Background Check List. This can be overall, or only those checks run by a specified operator, and/or checks run during a date range.

The report you can run here will show all purchases of tokens, and all uses of tokens, including the name of the operator who used the token, and the person the background check was performed on.

If you have any questions or need assistance using the KeepnTrack Background Check, please call KeepnTrack Customer Support at 1-800-320-5830 or email support@keepntrack.com.