How to navigate FIRST,VERIFY

A guide for vendors

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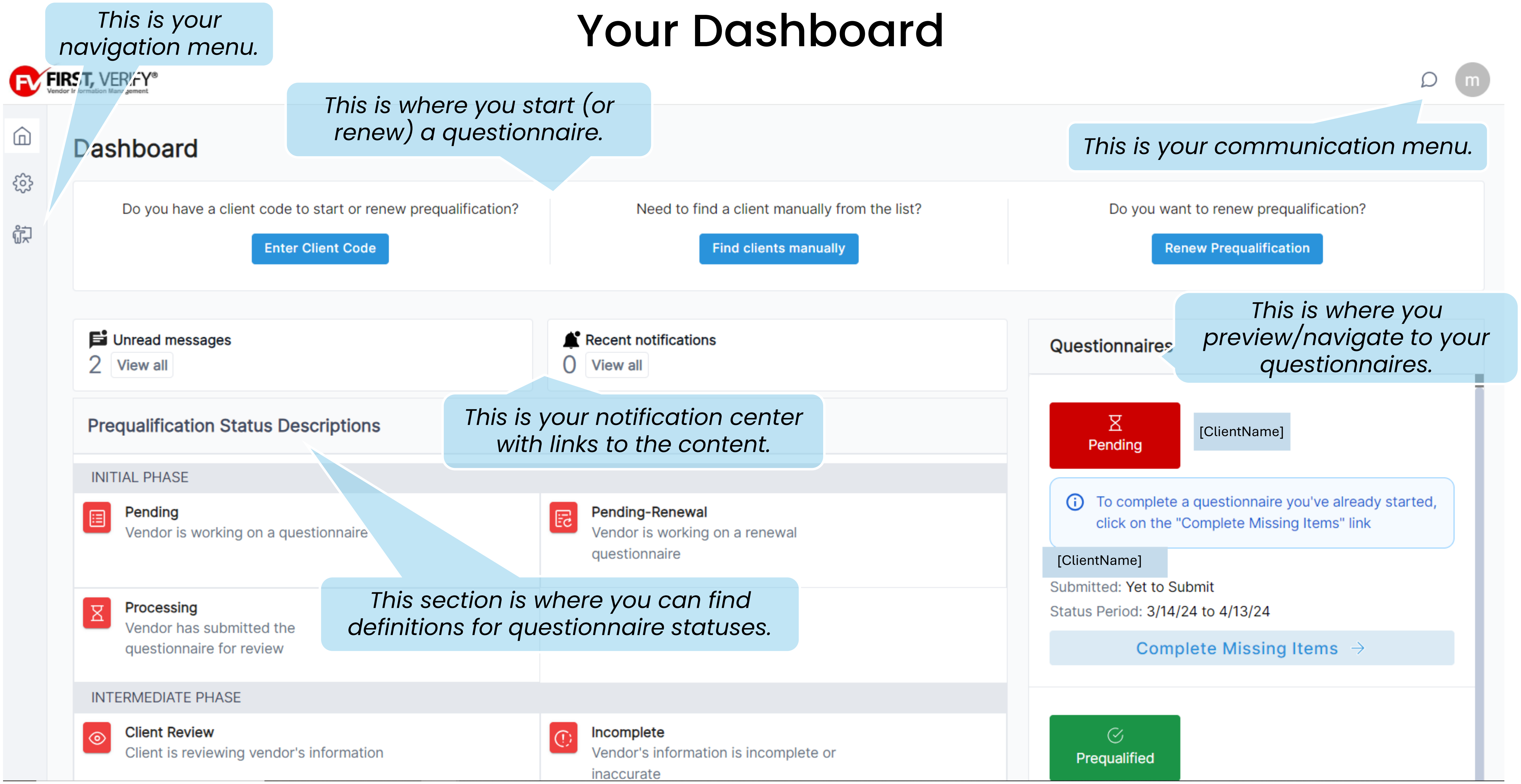
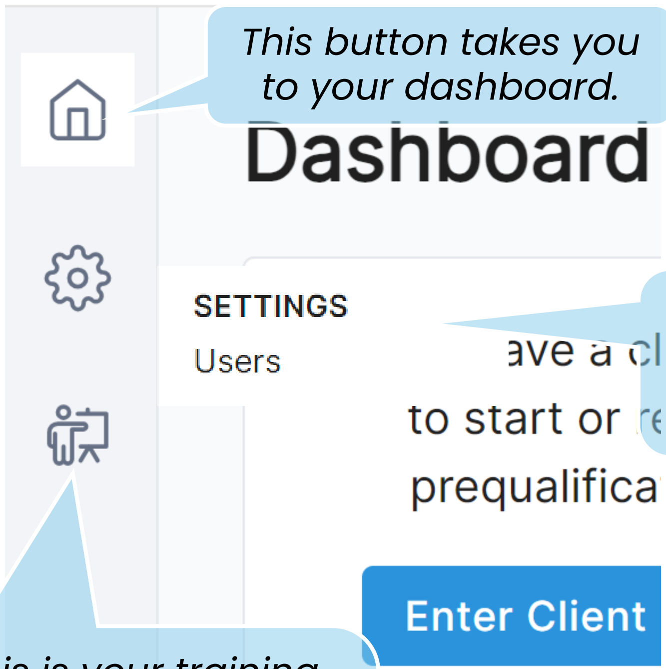
Your Dashboard



Navigation and Communication Menu

These menus remain on your screen while navigating the FV platform.

This icon bring you to your messages and notifications.

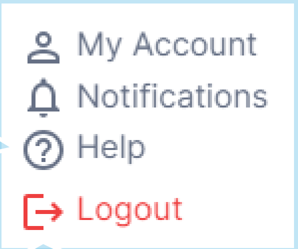


This button takes you to your dashboard.

Clicking the gear icon to the left (Settings) opens the user navigation menu.

This is your training menu. This is where you would go to add employees to take training as required.

Clicking this icon will open the following:



The Help button takes you to use guides, Terms and Conditions, Statement of Privacy, and contact information (also at the bottom of every page.)

- *My Account has options to update your information and password.*
- *Notifications shows you automated notifications that have been sent by the system.*

Starting a Questionnaire with a Client Code

Dashboard

Do you have a client code to start or renew prequalification?

Enter Client Code

This button on your dashboard will let you find your questionnaire from a client code that was sent to you by invitation (FV can help you find a lost invitation).

Using these tabs on the questionnaire page, you can navigate directly to other methods of opening a new questionnaire.

Find your Client(s) | Use a Client Code | Renew Prequalification

Enter Client Code **(Required for invitation-only clients.)**

Code given in Email: Type here

Entering the client code from your invitation will automatically pull up your client. Clicking the "Continue" button will take you to your questionnaire.

CANCEL | CONTINUE →

Starting a Questionnaire

Need to find a client manually from the list?

Find clients manually

This button on your dashboard will display a list of clients for you select from.

Using the tabs on the questionnaire page, you can navigate directly to other methods of opening a new questionnaire.

Find your Client(s) | Use a Client Code | Renew Prequalification

SINGLE-CLIENT QUESTIONNAIRES | MULTI-CLIENT QUESTIONNAIRES

Client Option 1

Client Option 2

Client Option 3

Select the radio button next to your client. Then scroll down to the "Continue" button.

CANCEL | CONTINUE →

Selecting "Continue" will take you to your newly-started questionnaire.

Renewing a Questionnaire

Do you want to renew prequalification?

Renew Prequalification

This button on your dashboard will let you renew your expired or expiring questionnaire from a list of clients.

Using these tabs on the questionnaire page you can navigate directly to other methods of opening a new questionnaire.

Find your Client(s) | Use a Client Code | Renew Prequalification

Renew client(s) expiring within 30 days

- Client Option 1
- Client Option 2
- Client Option 3

Select the radio button next to your client. Then scroll down to the "Continue" button.

CANCEL | CONTINUE →

Clicking the "Continue" button will take you to your renewal questionnaire.

Questionnaire Navigator

Active questionnaires will be listed here.

Questionnaires that need your action will list "Complete Missing Items" while ones that are complete will list "View Prequalification."

Questionnaires

Pending

Client

To complete a questionnaire you've already started, click on the "Complete Missing Items" link

Client

Submitted: Yet to Submit

Status Period: 3/14/24 to 4/13/24

Complete Missing Items →

To complete a questionnaire that has not been submitted, or to submit requested documents/ items, you will select the "Complete Missing Items" button.

Prequalified

Client

Client

Submitted: Yet to Submit

Status Period: 3/26/24 to 3/26/25

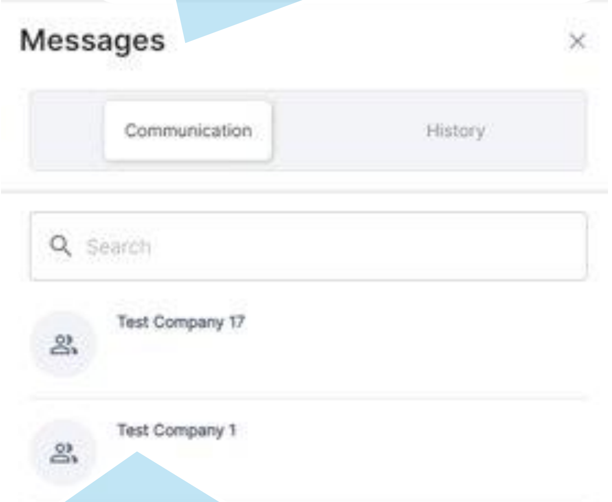
View Prequalification →

To view a submitted questionnaire or upload new documents, select the 'View Prequalification' button.

Messages

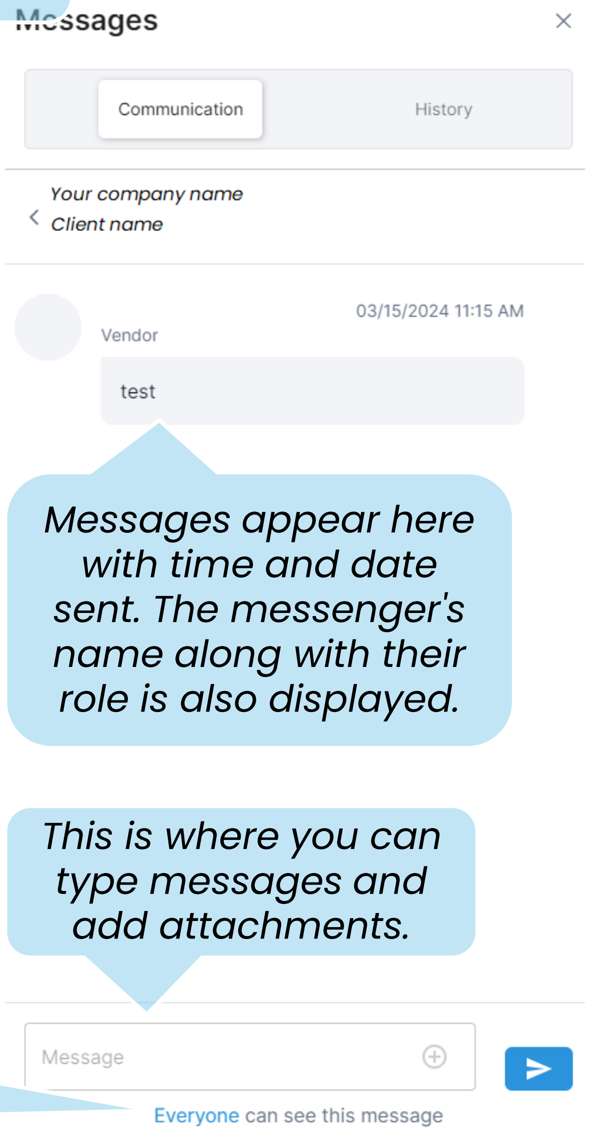
Navigate here by clicking the speech icon (💬) in the communications menu.

This is how the messages tab appears from the dashboard.



Selecting a client will open the communication log as well as navigate to the questionnaire which the communication is associated.

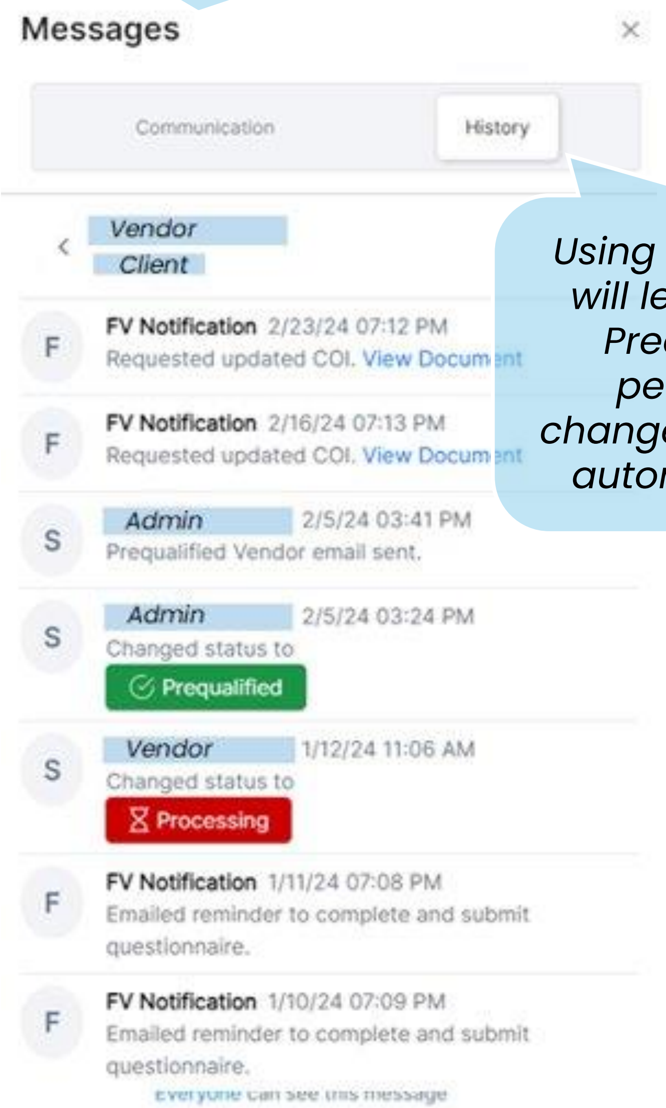
You can send a message to everyone or just Admin.



Messages appear here with time and date sent. The messenger's name along with their role is also displayed.

This is where you can type messages and add attachments.

This is how the messages tab appears from within a questionnaire.

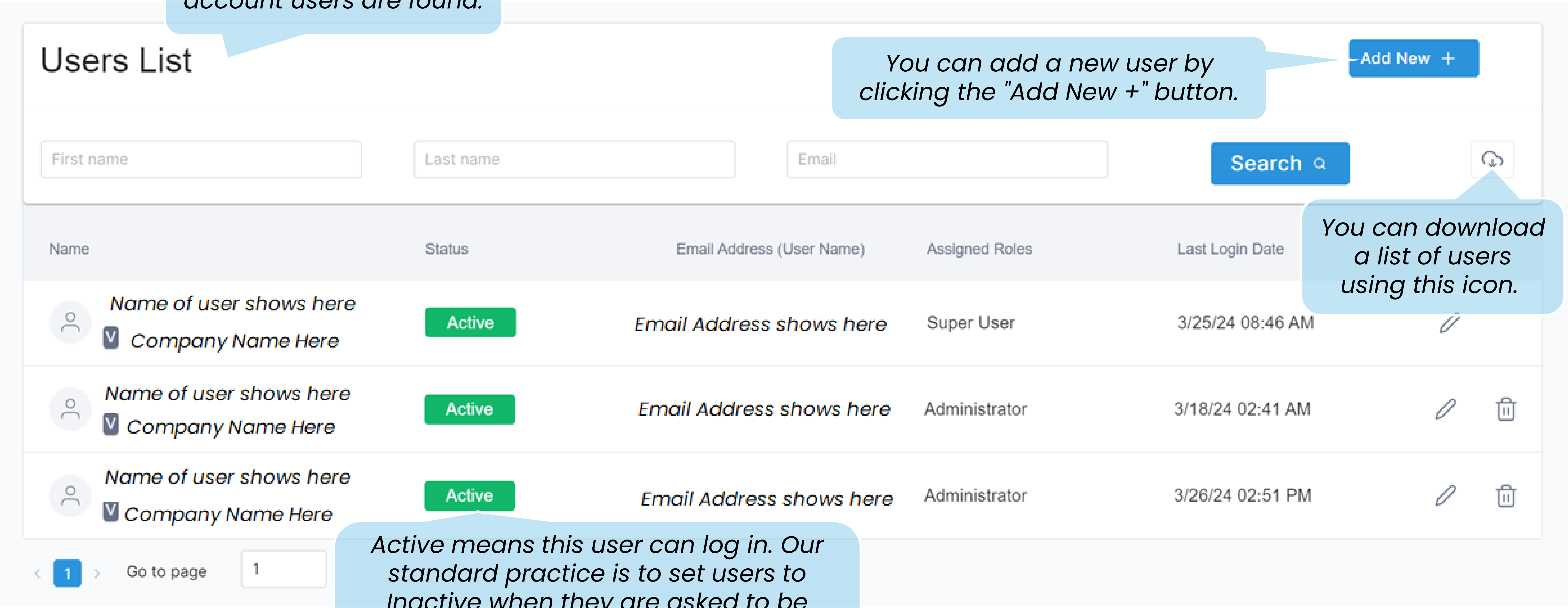


Using the History Tab will let you see that Prequalification periods status changes, manual, and automated emails.

Users

Navigate here by clicking the gear icon ( ) in the navigation menu.

This is where your account users are found.



You can add a new user by clicking the "Add New +" button.

You can download a list of users using this icon.

Active means this user can log in. Our standard practice is to set users to Inactive when they are asked to be removed. This means any work they did onsite will be logged for future review.

Adding Users

First you generate the user profile. You will need to let the user know the initial password, which they can reset later.

Add User

Company *
National Business Company, Inc.

Email Address *
Email

Password *
Password

Confirm Password *
Confirm Password

CANCEL | NEXT

You must complete all mandatory fields to fully set up a new user. There are 6 minimum pieces of information.

1. *First Name*
2. *Last Name*
3. *Title*
4. *Email address*
5. *Phone Number*
6. *Role*

First Name *	First Name
Last Name *	Last Name
Title *	Title
Email Address*	temporaryuser@email.com
Phone Number *	Phone Number

A Role must be assigned: scroll to this section, click this button, select and save the Role.

Company Access

(must select security role below before saving.)

Name of the Company	Assigned Roles
National Business Company, Inc.	

Reading a questionnaire

This widget shows your company name, the client this questionnaire is for, the effective and expiration dates, and the current status.

Company name is listed here

Client: *Client name here*

Status Period: 3/26/24 to 3/26/25

Prequalified

All clients have different requirements and needs for prequalification. It is important to know that no two questionnaires are the same and this is an example to show how to navigate the basic functions. Always read the Introduction *and* Prequalification Requirements *sections on every new and renewal questionnaire.*

Questionnaire

These are questionnaire sections. The active section is displayed in orange.

*This progress bar shows the total questions completed… **NOT** that your questionnaire is approved.*

When a section is completed, it displays with the blue check mark.

100%

331 Complete / Out of 331 Total Questions (100% Complete)

Introduction | Prequalification Requirements | General Information 17/17 | Locations | Complete Payment | Business 40/40 | Insurance 13/13 | Bidding Interests 15/15 | Safety Statistics 34/34 | Safety Programs & Procedures 212/212 | Supporting Documents

Use this scroll bar to navigate to all sections of a questionnaire.

1 Introduction | 2 Downloads | 3 Prequalification | 4 Employee Safety Orientation & Site Safety Policies | 5 Payment | 6 Who Sees Your Information

These are subsections. The active subsections are displayed in orange.

When a section has been completed and the "Save and Continue" button has been clicked, the subsection will display a green check.

How to contact **FIRST,** VERIFY

support@firstverify.com

(402) 562-5930

Hours of operation: 9am – 6pm ET M-F

Every client has a designated Account Manager. If you do not know who yours is, you can call the main line and we will direct you.