eRailSafe Client User Guide

Managing Applicants, Badges, and Your Account

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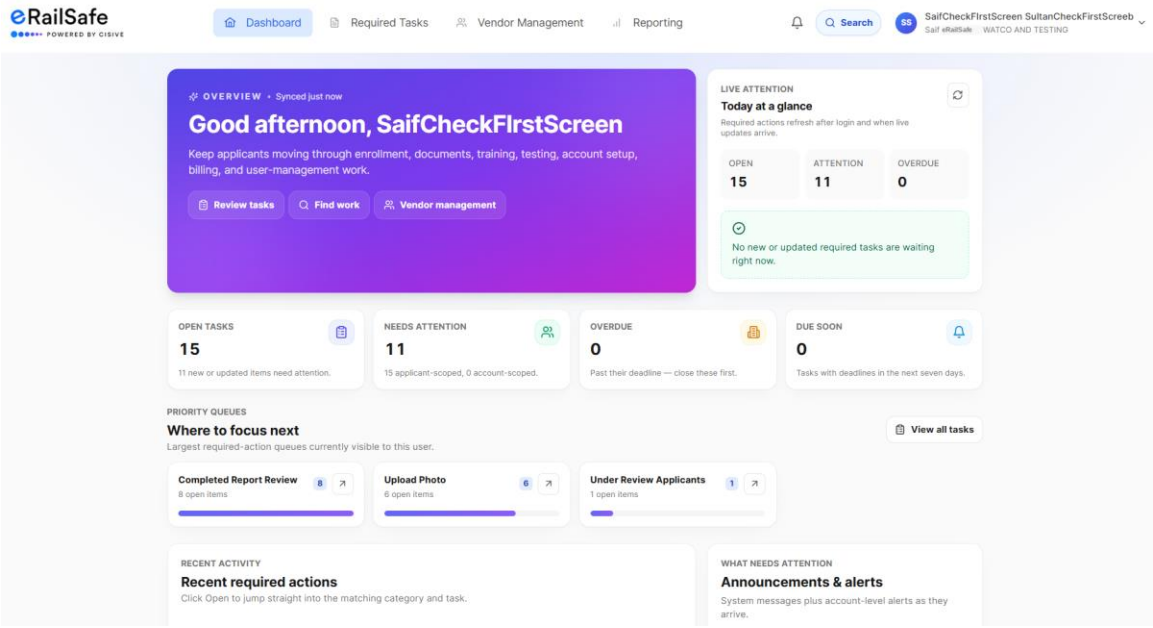
Welcome

This guide covers everything you'll need to manage your organization's applicants day-to-day in eRailSafe — from adding new applicants and tracking their progress, to generating badges and managing your account. If you're setting up your company's account for the first time, see the separate eRailSafe Enrollment Guide instead.

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Your Dashboard

The Dashboard is the landing page you see immediately after logging in. As an account administrator, you're responsible for managing applicants through the enrollment process, monitoring required tasks, and ensuring compliance-related actions are completed on time.



The Dashboard gives you a real-time summary of your workload, outstanding tasks, and alerts, organized into five areas:

- Top Navigation Bar
- Welcome Banner & Quick Actions
- Live Attention Panel
- Task Summary Cards
- Priority Queues & Activity Feed

The navigation bar runs across the top of every page and provides access to four primary sections:

- Dashboard — returns you to the main landing page from anywhere on the platform.
- Required Tasks — your full list of open and pending tasks to manage and action.
- Vendor Management — tools to view, add, and manage your applicants.
- Reporting — reports and analytics on applicant progress, task completion, and compliance status.

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Account Management

Account Users

This section allows you to add, edit, search, or disable authorized users of your account.

💡 **Best Practice:** Assign users only the role(s) required for their job responsibilities. Adding multiple roles does not provide additional access and will create conflicting permissions that limit system functionality. If a user is unable to perform an expected action, reviewing their assigned roles and removing any unnecessary permissions will likely resolve the concern.

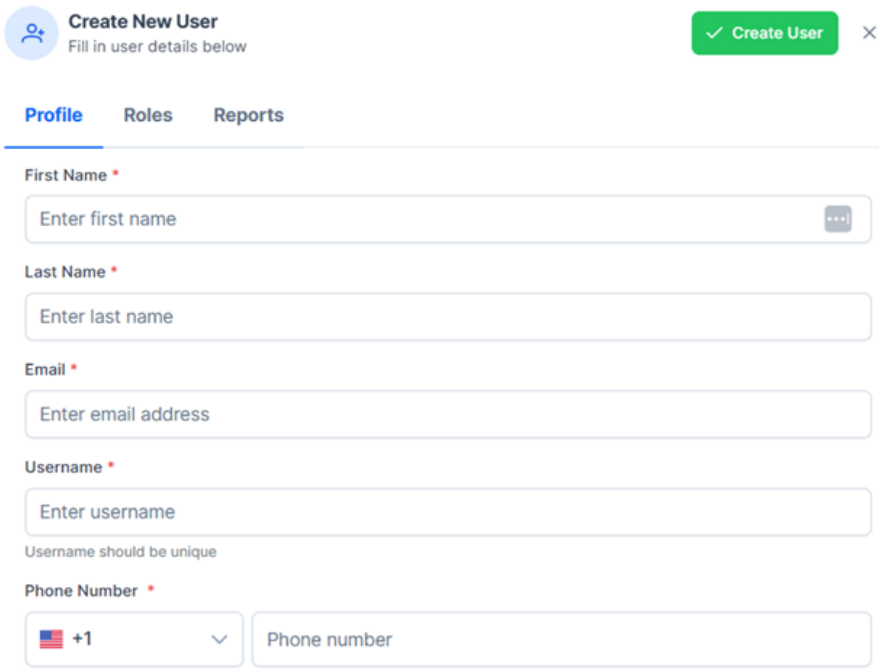
Role	Access Level	Purpose / Access Overview
Vendor Administrator	Full Access	Full access to all locations. Can manage users, including Location Administrators, and has access to applicants, background checks, reports, tracking information, billing information, and other administrative functions.
Vendor Administrator without Billing	Restricted Access	Full access to all locations and user management, including Location Administrators. Same capabilities as Vendor Administrator except for access to billing and invoice information.
Location Administrator	Full Access (Location Only)	Administrative access is limited to assigned locations. Can manage users within those locations, initiate and view background checks, manage applicants, run reports, and access location-level billing information.
Location Supervisor	Restricted Access	View-only access for applicant information. Can view applicants and dashboards, reset applicant usernames and passwords, and view tracking information. Cannot modify applicant records or perform administrative actions.
Location Notifier	Notification Only	Receives email notifications when applicant badges are generated. This role does not provide access to the application.
HQ Accounts Payable	Restricted Access	Can view and pay invoices for all locations when the organization is configured for centralized billing. No applicant, reporting, or user-management access.
Location Accounts Payable	Restricted Access	Can view and pay invoices for assigned locations only. No applicant, reporting, or user-management access.
HR User	Restricted Access	Can initiate, manage, and view background checks for assigned locations. Has access to applicants and reporting information needed to support the screening process.
HR Viewer	Restricted Access	Read-only access to background check and report information for assigned locations. Cannot initiate screenings or make changes to applicant records.

HR Initiator	Restricted Access	Can create applicants, initiate background checks, and provide information required to begin the screening process. Has fewer permissions than an HR User and is focused primarily on enrollment and screening initiation activities.

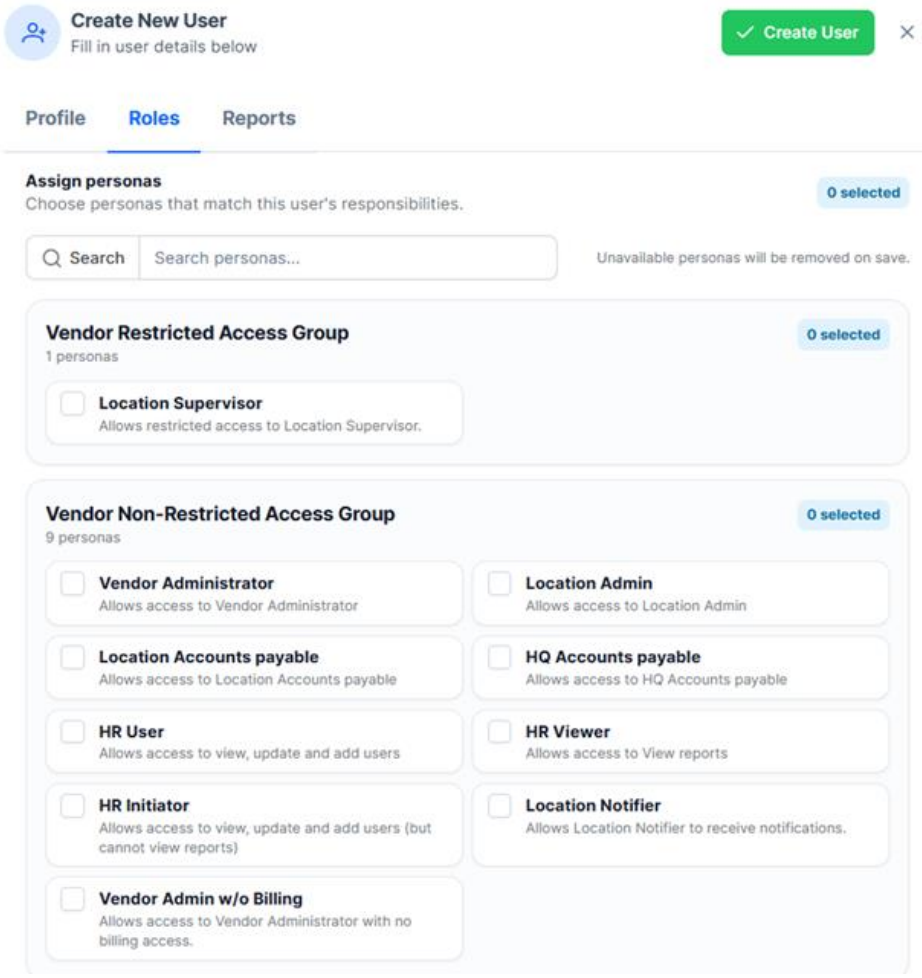
Add a User

To add a new authorized user to your account, follow these steps:

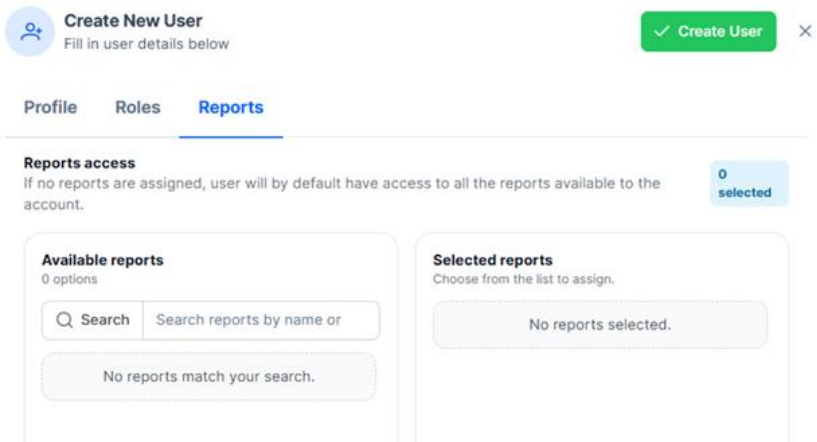
- Click on your name in the top right corner of the page.
- Select My Account.
- Click Users to open the Manage Users page.
- Click the Create User button.
- On the Create New User card, complete the process by entering the new user's name, email address, preferred username, and contact telephone number on the Profile tab.
  Note: The dropdown menu by the phone number field indicates country code.



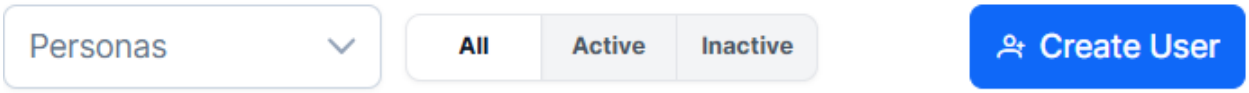
- Select the Roles tab to select the persona required for the new user. The roles available to you based on your own role will be displayed.
  Note: If a role is not selected, the user will not be able to access the system.



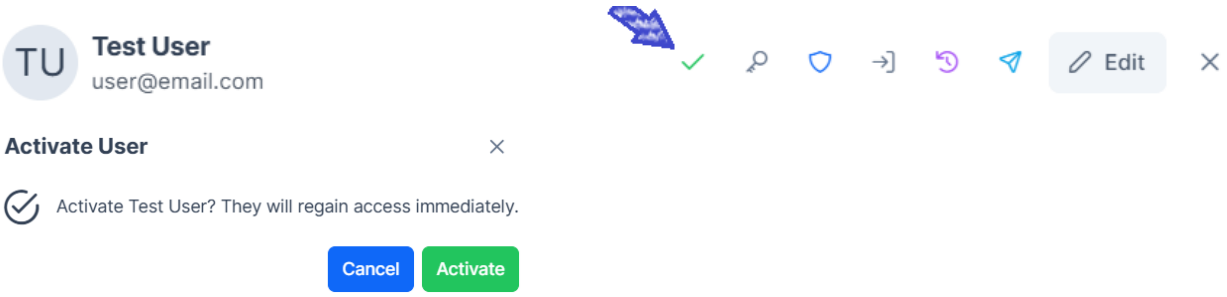
- The final tab, Reports, likely does not apply to you as an eRailSafe user.



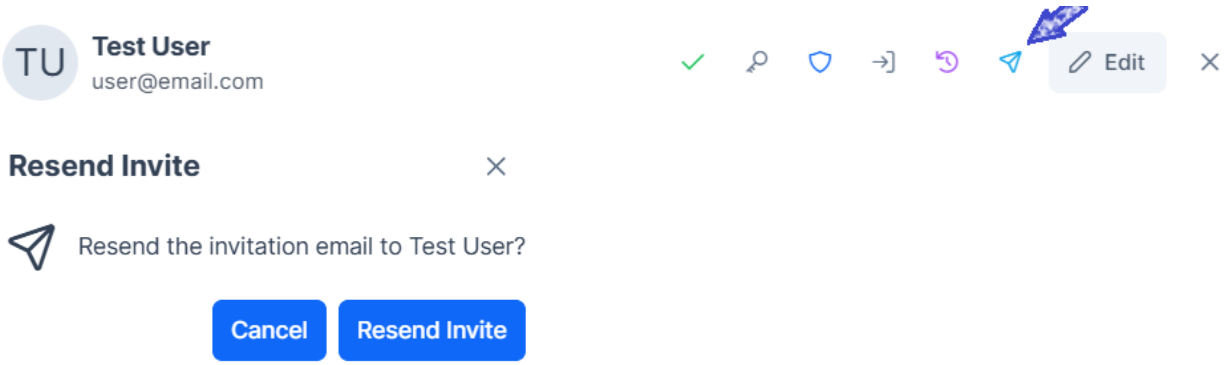
- Click the Create User button in the top right corner to save your changes.
- Ensure that your preference is set to view all users, both active and inactive.



- Find the new user in the list and click to open the user's card.
- Click the checkmark in the Actions icon row to activate the new user. An email will be sent to the new user to complete their registration.



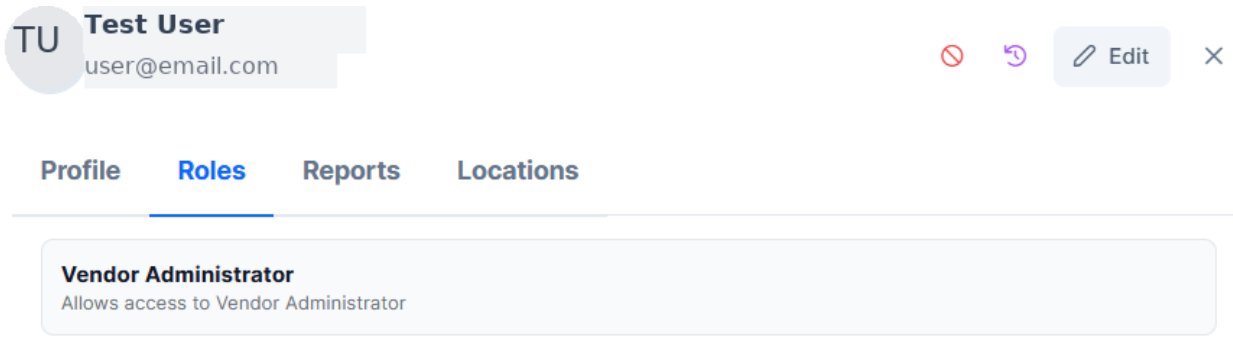
- If the new user does not receive the email, you can resend it by clicking the Resend Invite icon in the Actions list.



Edit an Existing User

To edit an existing user, an administrator with higher access than the user being edited will take the following steps:

- Click on your name in the top right corner of the page.
- Select My Account.
- Click Users to open the Manage Users page.
- Navigate to the user you wish to edit and select them to open the user card.



- Click the Edit icon in the top right corner.

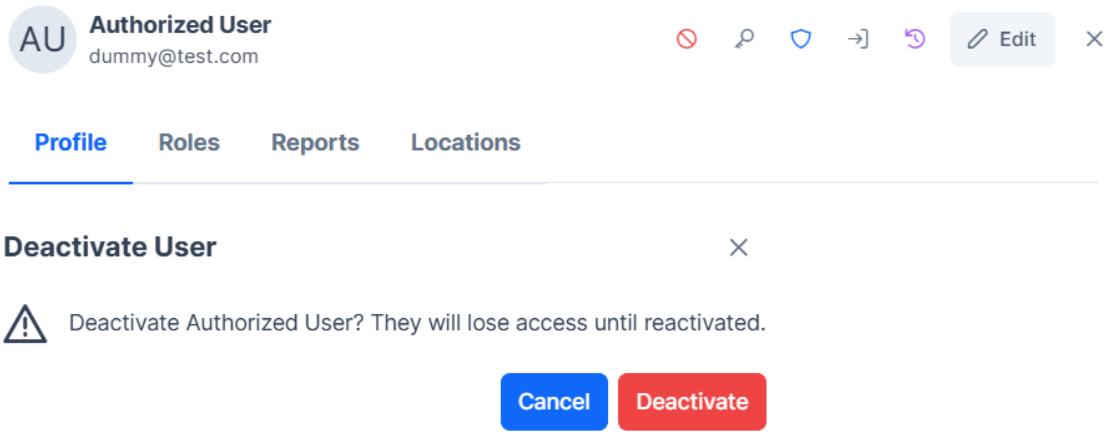


- Click the tab you wish to edit (Profile, Roles, Reports, or Locations).
- Make the desired changes.
- Click the Save button in the top right corner to save your changes.

Disable a User

To disable an existing user, an administrator with higher access than the user being disabled will take the following steps:

- Click on your name in the top right corner of the page.
- Select My Account.
- Click Users to open the Manage Users page.
- Navigate to the user you wish to edit and select them to open the user card.
- Click the 🚫 icon in the top right corner and then click Deactivate in the pop-up box.



Need to assign a location admin to multiple locations? Please call Customer Support at 1-800-560-6435 or email us at customer.support@everifile.com for assistance.

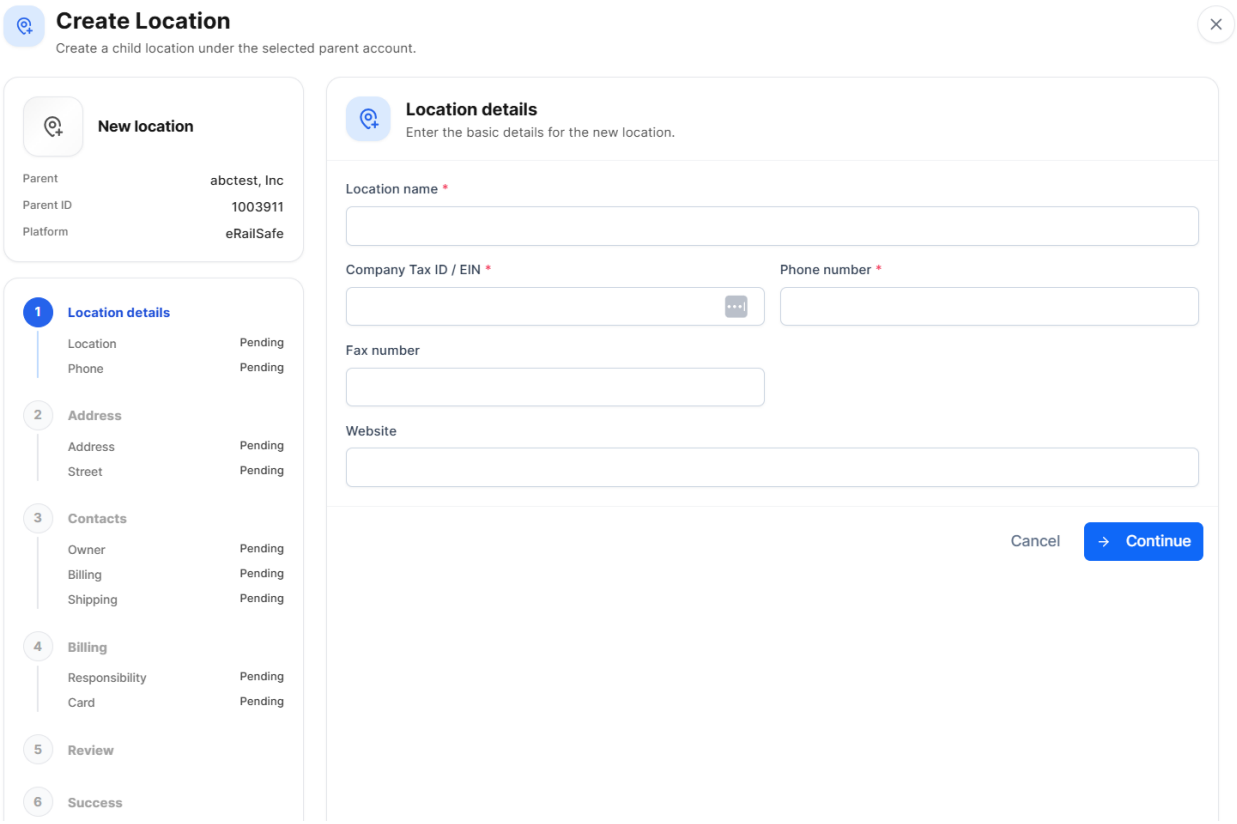
Add a Location

You can create additional locations for your account to keep applicants separated based on location, project, or other criteria. Each location can have its own administrators and payment preferences.

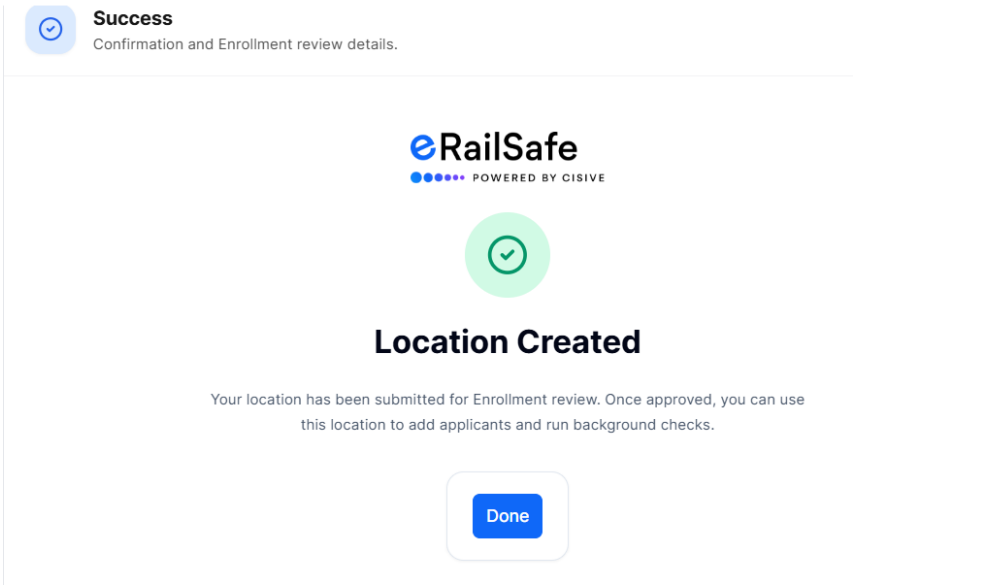
After a new location is requested for your account, please allow 24-48 hours for our Enrollment team to complete the setup of your location. You will receive an email when the location is ready for your use.

Create a new location by following the steps below:

- Click on your name in the top right corner of the page.
- Select My Account.
- Click Dashboard and then select the Account Information card.
- Select the Create Location button.



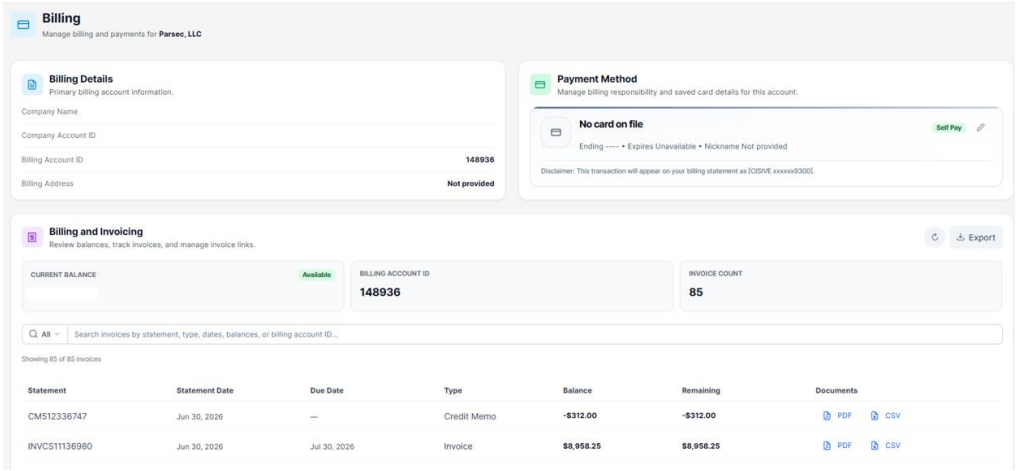
- The system will guide you through entering your new location details, including the location name, tax ID number, contact phone number, address, primary, billing, and shipping contacts, and payment responsibility (either self-pay or parent-pay).
  Note: If the self-pay option is chosen, you will be prompted to enter credit card details at that time.
- Your final step will be to review the information entered before submitting the request. Once you have reviewed, you will see the Success screen:



Billing

In the Billing section, you can view invoices and detail files, payment method information, and other details related to your account billing. To access this area, please follow the steps below:

- Click on your name in the top right corner of the page.
- Select My Account.
- Click Dashboard and then select the Billing card.



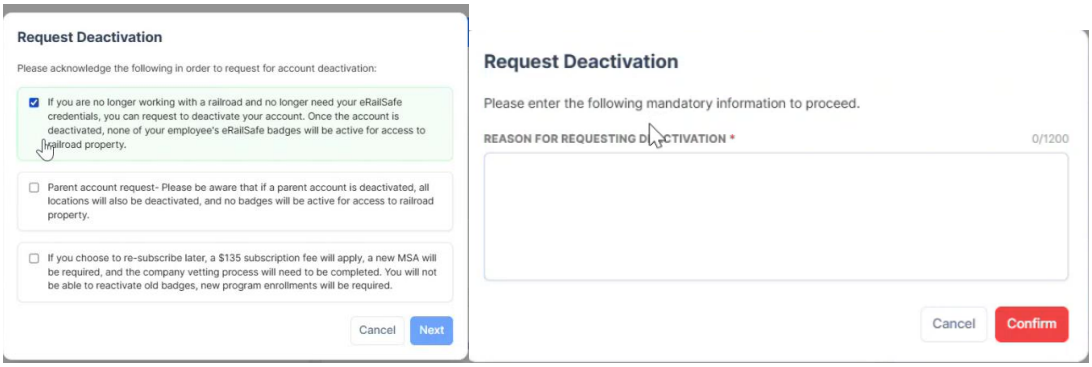
- Click the pencil icon to edit the payment method.
- Click the PDF or CSV options to review invoices and their associated detail files.

Deactivate Account (or Location)

If you no longer need access to your account, you can submit a request to deactivate it. Please note that accounts with an outstanding balance cannot be deactivated. Any balance due must be paid in full before a deactivation request can be approved and processed.

To request account deactivation, follow the steps below:

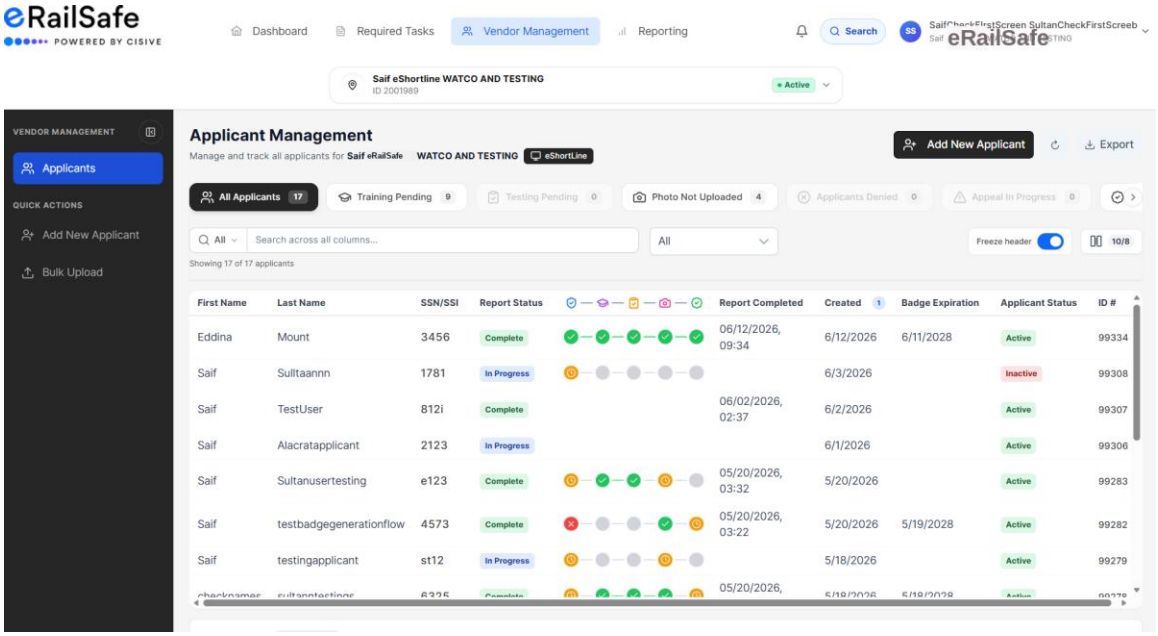
- Click on your name in the top right corner of the page.
- Select My Account.
- Navigate to the Account Status section.
- Click the Request Deactivation button.
- Review the deactivation information and confirm all required acknowledgment checkboxes.
- Click Next.
- Enter the reason for your deactivation request.
- Click Confirm to submit the request.
- You will receive an email notification once your request has been reviewed and your account has been deactivated.



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Applicant Management

Selecting Vendor Management from the top navigation brings you to the Applicant Management page, where you can see every applicant tied to your organization along with a running count.

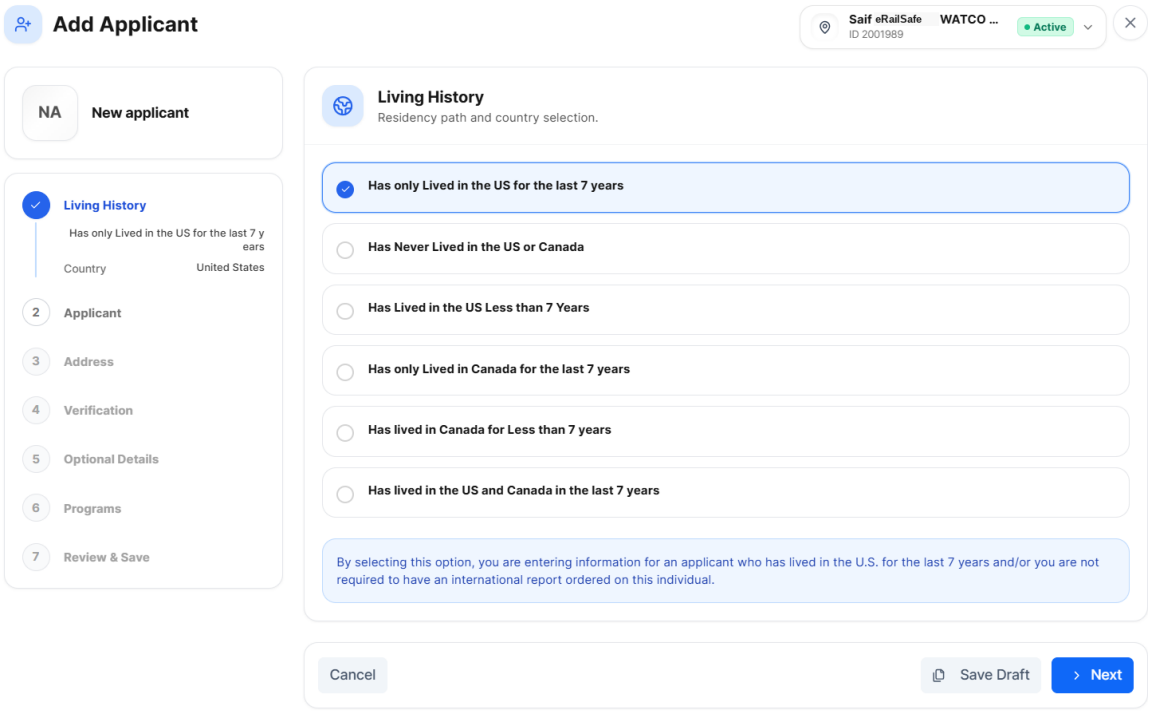


From this page, you can:

- Use filter tabs to quickly segment applicants by status — All Applicants, Training Pending, Testing Pending, Photo Not Uploaded, Denied, and more.
- Search a table listing each applicant's name, SSN/SSI, report status, workflow progress, created date, badge expiration, and active/inactive status.
- Add a single applicant or use Bulk Upload (Coming Soon) to add multiple applicants at once.

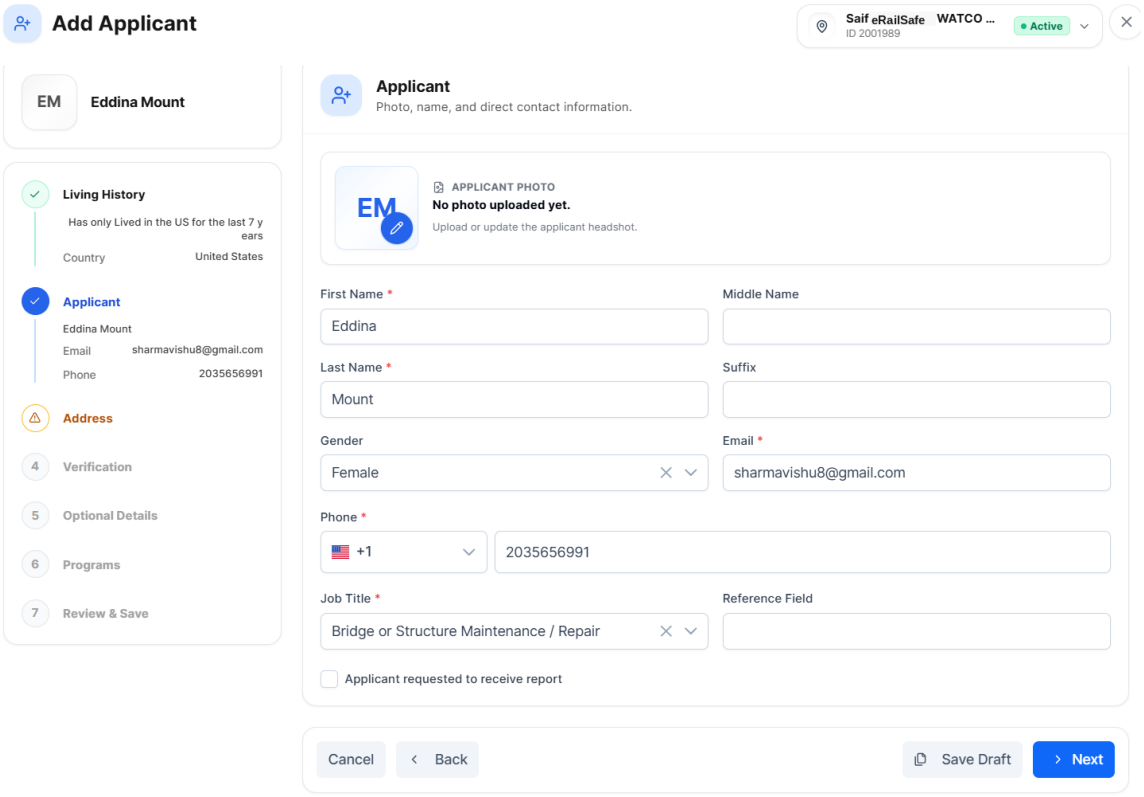
Adding a New Applicant

Selecting Add New Applicant opens a 7-step form to enroll a new applicant.



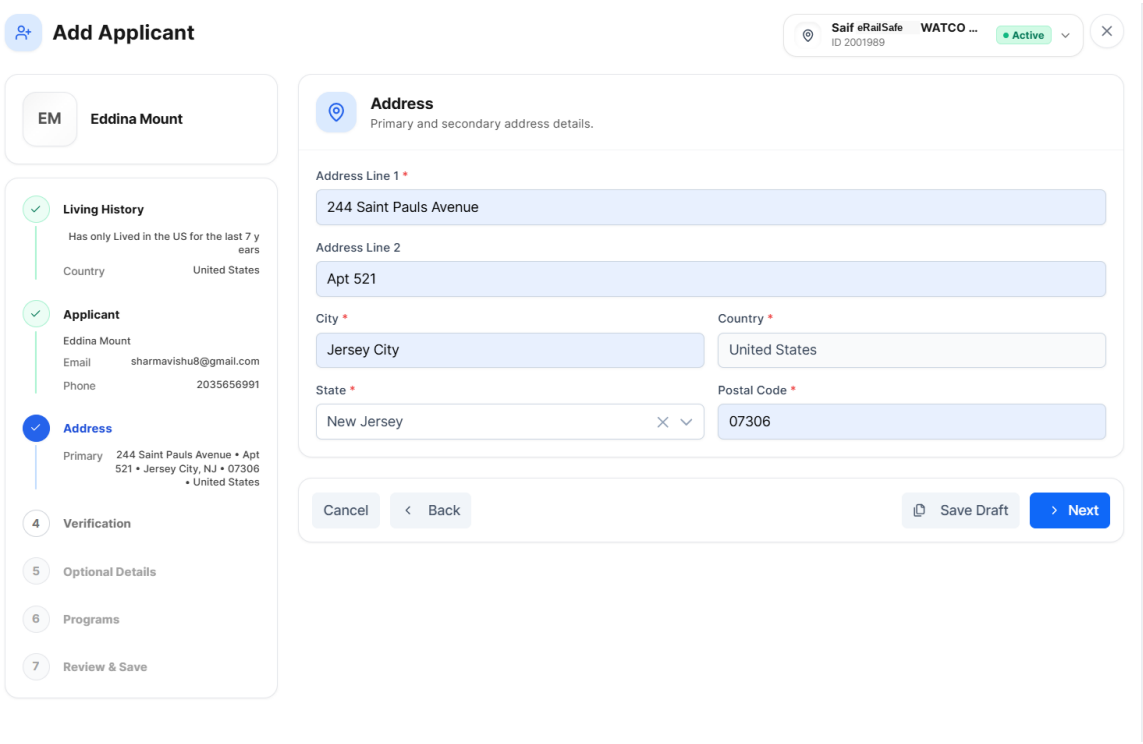
Step 1: is Living History, where you select the applicant's residency background from six options (US only, Canada only, both, less than 7 years, and so on). This determines whether an international background report is required. You can Save Draft at any point or select Next to continue through the steps.

Step 2: Applicant Details



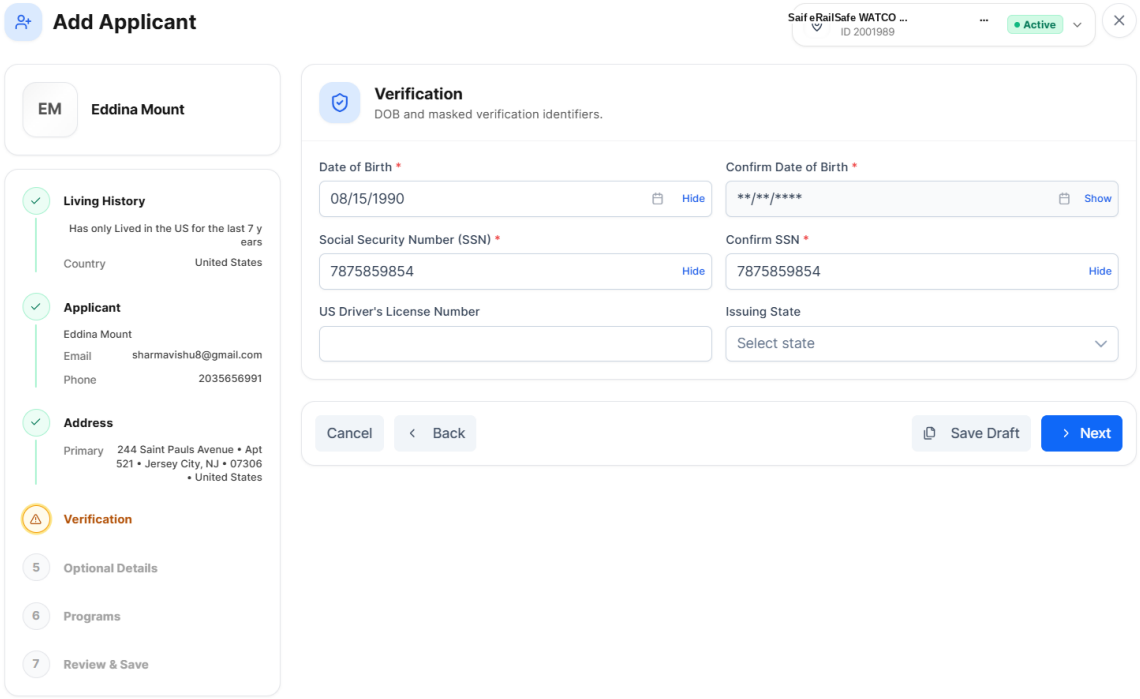
Enter the applicant's basic personal and contact details: name, gender, email, phone, and job title, with an optional photo upload. There's also a checkbox if the applicant has requested a copy of their report.

Step 3: Address



Enter the applicant's primary residential address, including street address, apartment number (if applicable), city, state, country, and postal code.

Step 4: Verification

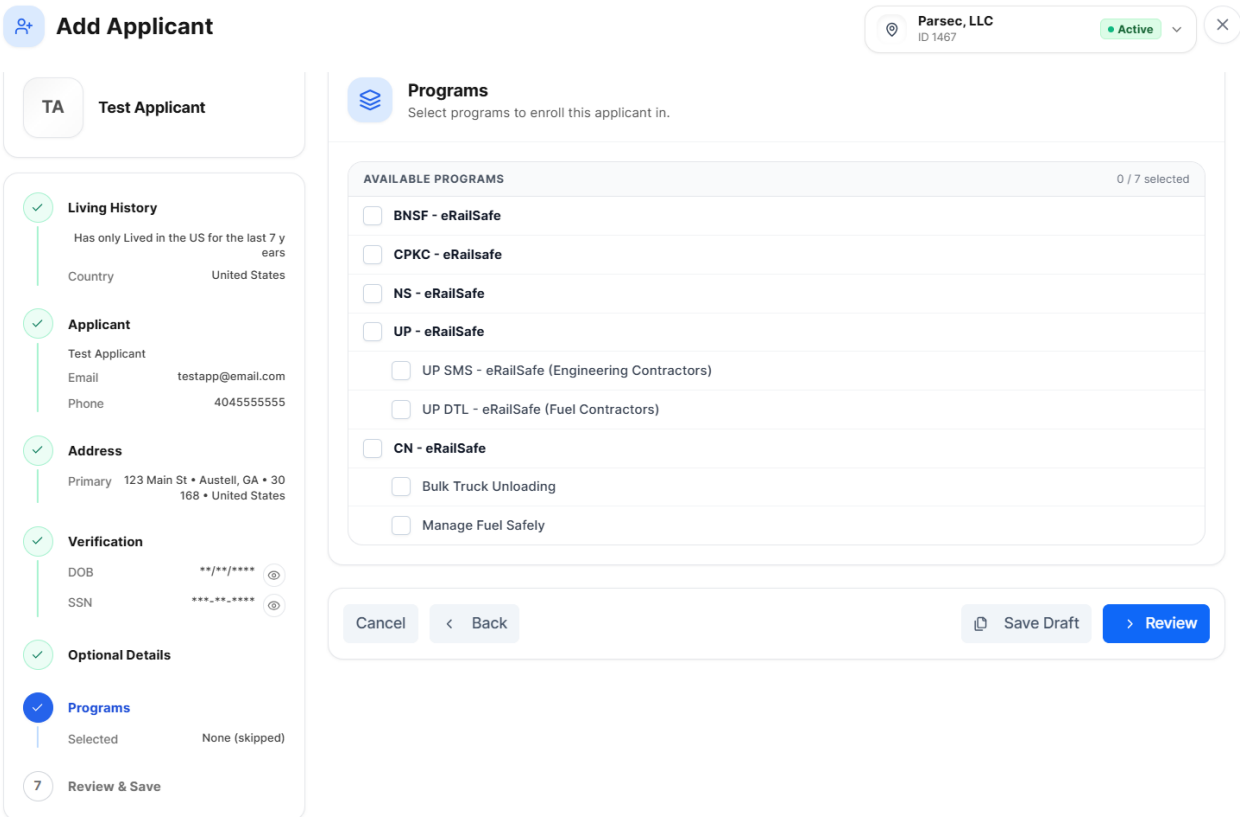


This step captures sensitive identity information, including date of birth, Social Security Number, and optionally a US driver's license number. All fields include confirmation inputs and masking toggles for security. Requirements here vary based on the Living History selection in Step 1 — for example, a US-only applicant will see SSN fields, while international residency paths present different identifier requirements.

Step 5: Other types of reports

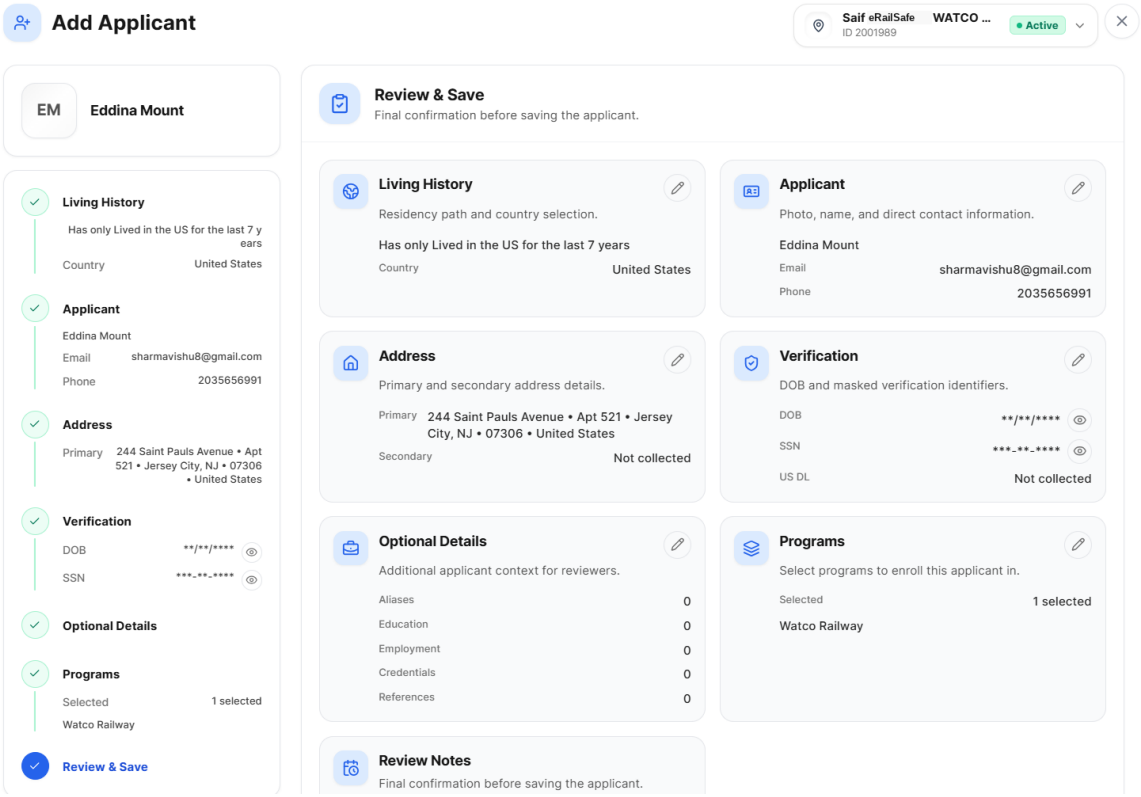
eRailSafe does not require these supplemental reports and this section can be bypassed. If you need to add additional services, please contact our Enrollment at enrollment@everifile.com.

Step 6: Programs

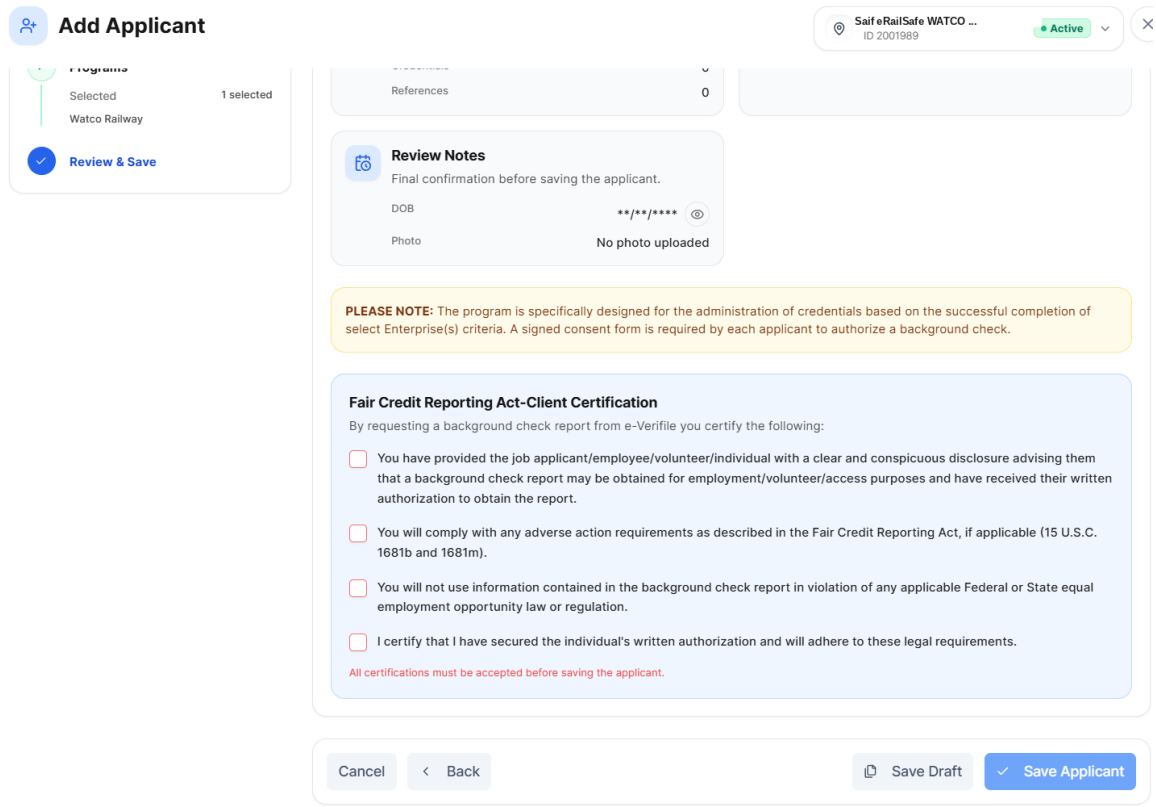


Choose the railway programs the applicant needs. The training and testing requirements are driven by the program(s) selected here.

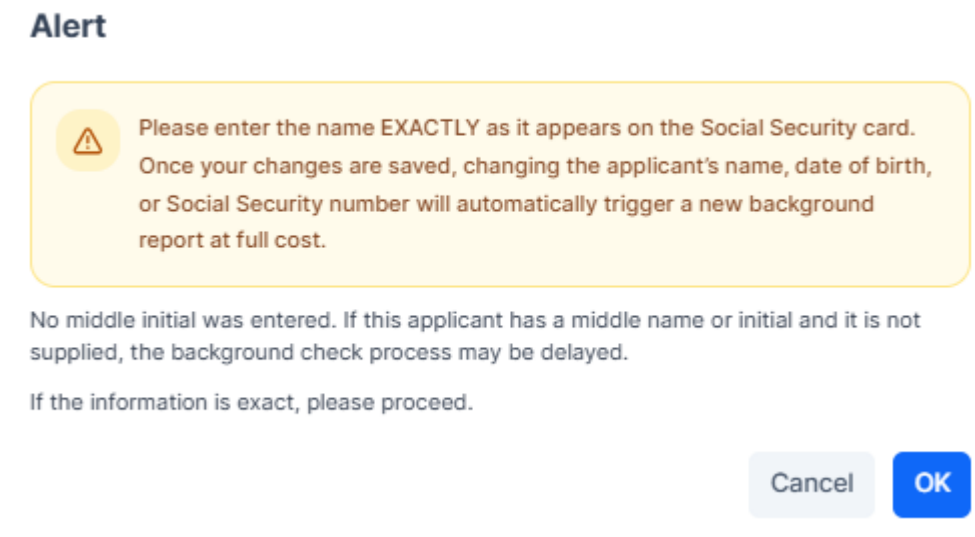
Step 7: Review & Save



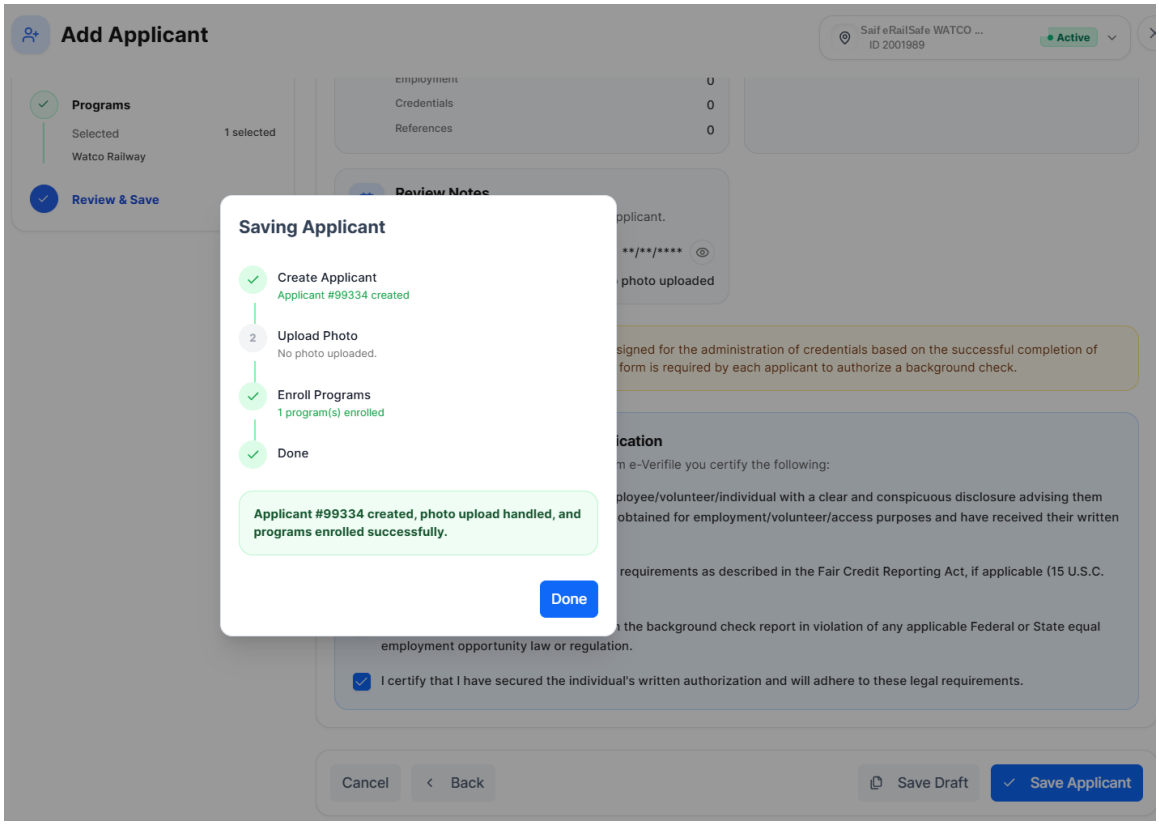
Review a full summary of everything entered across the previous steps, organized into cards for each section. Each card has an edit icon so you can jump back and make corrections if needed.



This step also includes a Fair Credit Reporting Act (FCRA) certification section — all four compliance acknowledgments must be checked before the Save Applicant button becomes active. A signed consent form is also required from each applicant to authorize the background check. Please visit our website if you would like to see sample consent forms.



Important: Enter the applicant's name exactly as it appears on their Social Security card. Any changes after saving will trigger a new background report at full cost. If no middle name or initial is entered, this can also delay the background check process.

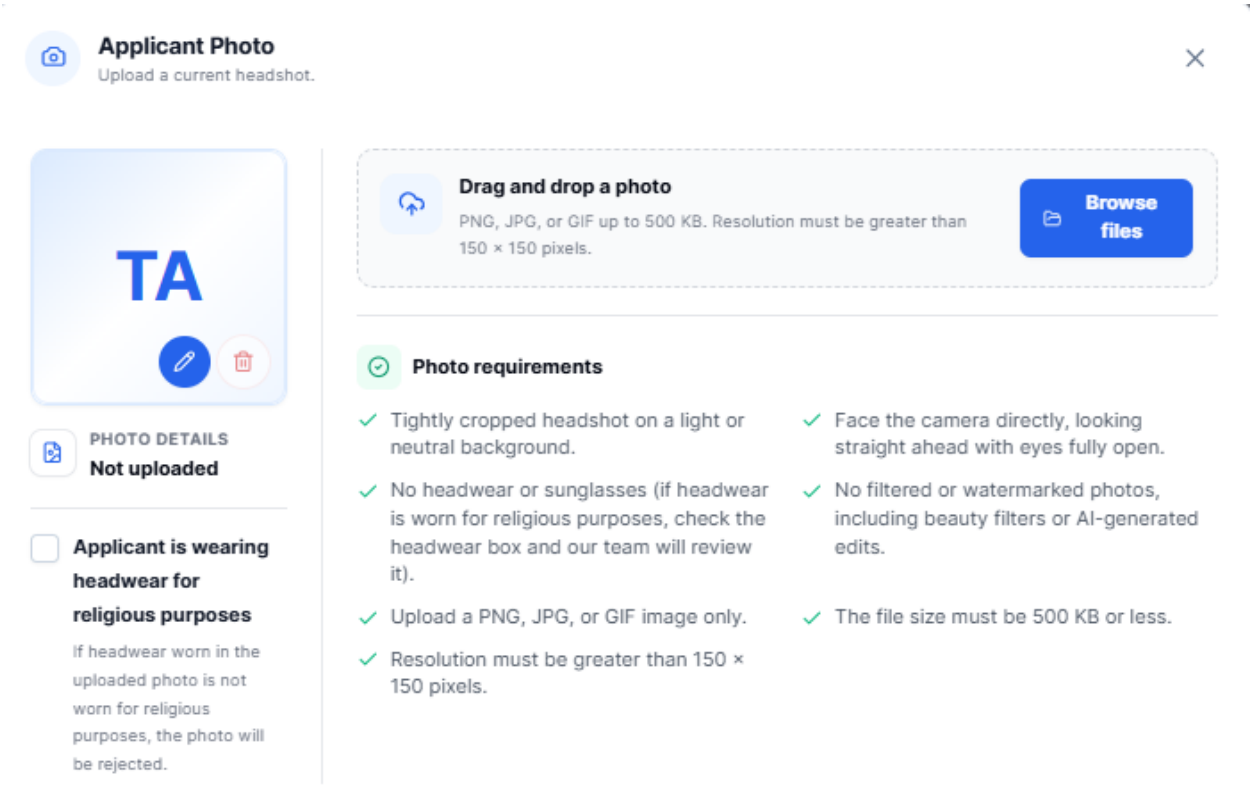


After confirming, the system processes the submission and shows step-by-step saving progress — applicant record created, photo upload status, and programs enrolled. Once complete, select Done to finish.

Bulk Applicant Upload

Coming soon! You can use this feature in the previous tool until it is available here.

Uploading a Badge Photo

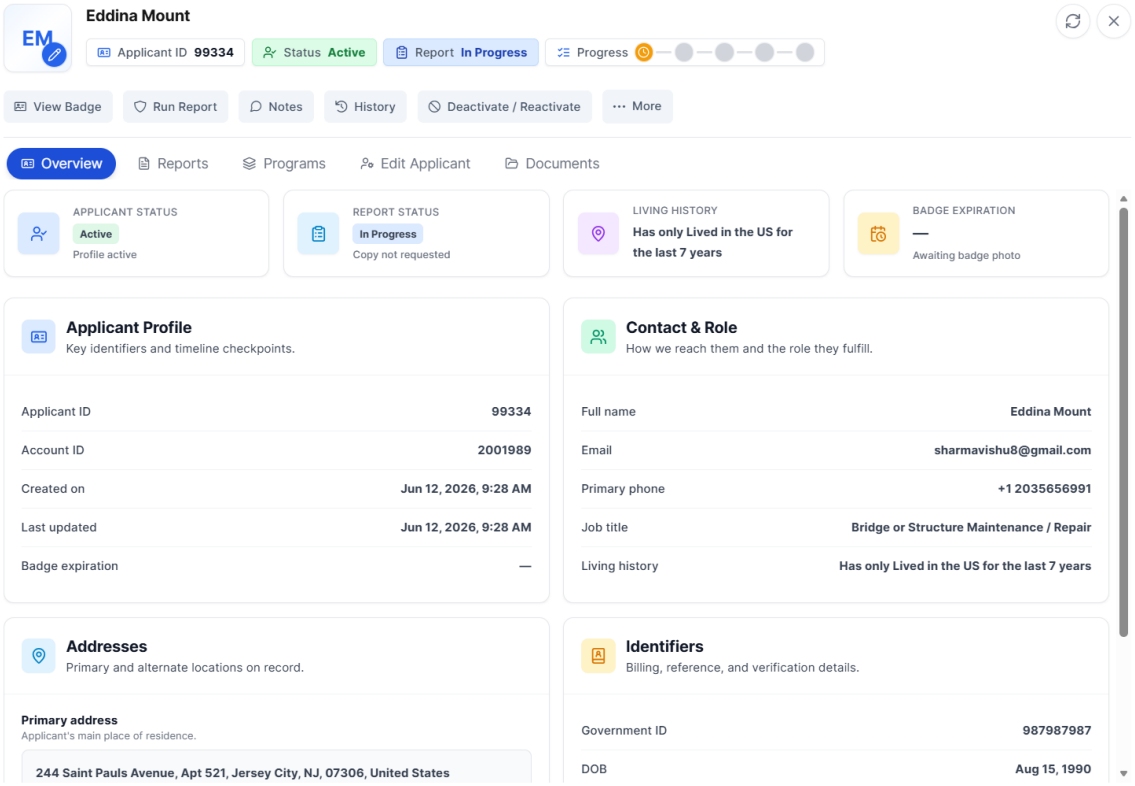


Selecting the pencil icon on an applicant's avatar opens the Badge Photo upload tool. You can drag and drop or browse for a photo. Requirements are listed here:

- Tightly cropped headshot on a light or neutral background
- Applicants must be facing forward, looking directly at the camera, with eyes fully open.
- No headwear or sunglasses permitted (if headwear is worn for religious purposes, select the designated box in the photo upload task and our team will review it)
- No filtered or watermarked photos accepted (this includes beauty filters and/or AI-generated edits)
- Minimum size: 150x150 pixels
- Maximum file size: 500 KB
- Accepted formats: .jpg, .png, and .gif

There's also a checkbox to flag if the applicant is wearing religious headwear in the photo.

Reviewing an Applicant's Profile

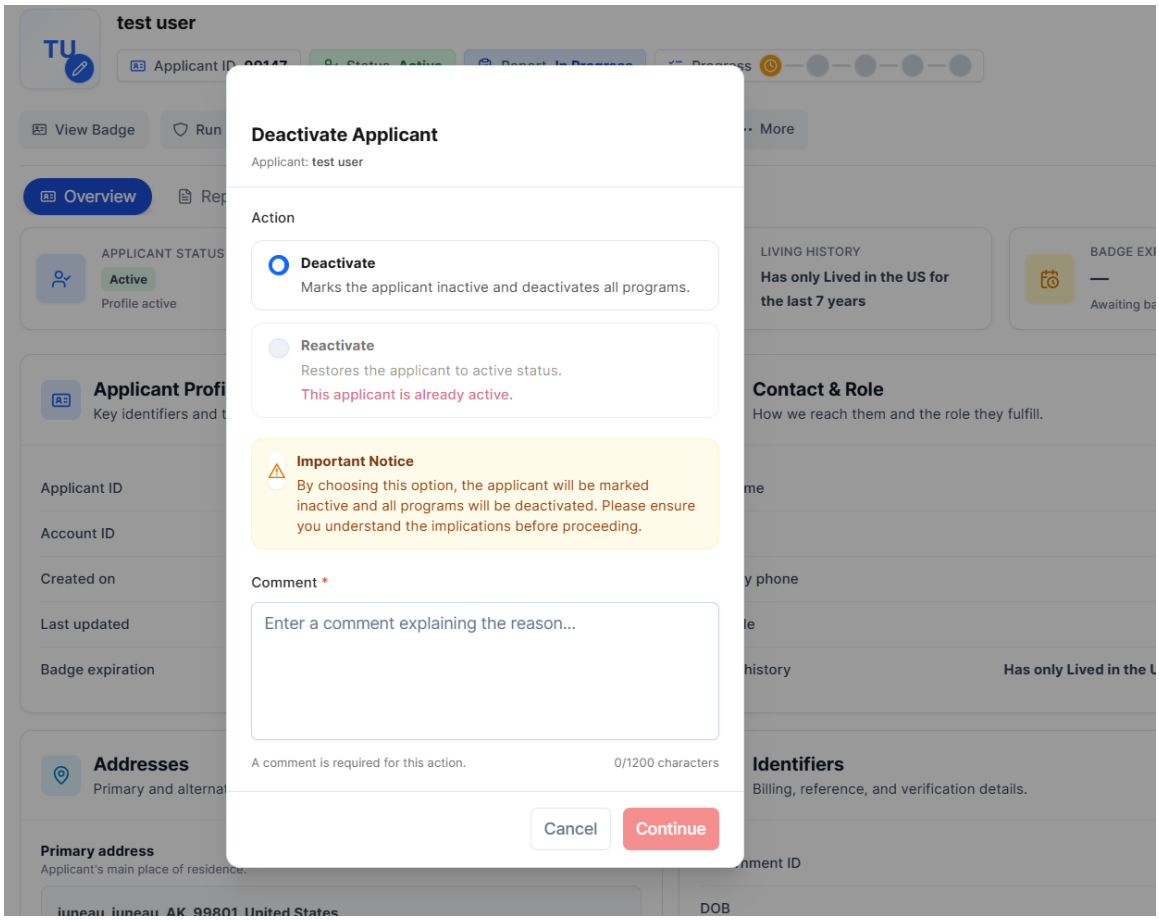


From the Applicant Management list, selecting anywhere on an applicant's row opens their full profile as a side panel. At the top, you'll see their status, report status, and workflow progress at a glance. Below that, tabs for Overview, Reports, Programs, Edit Applicant, and Documents give you access to their full record.

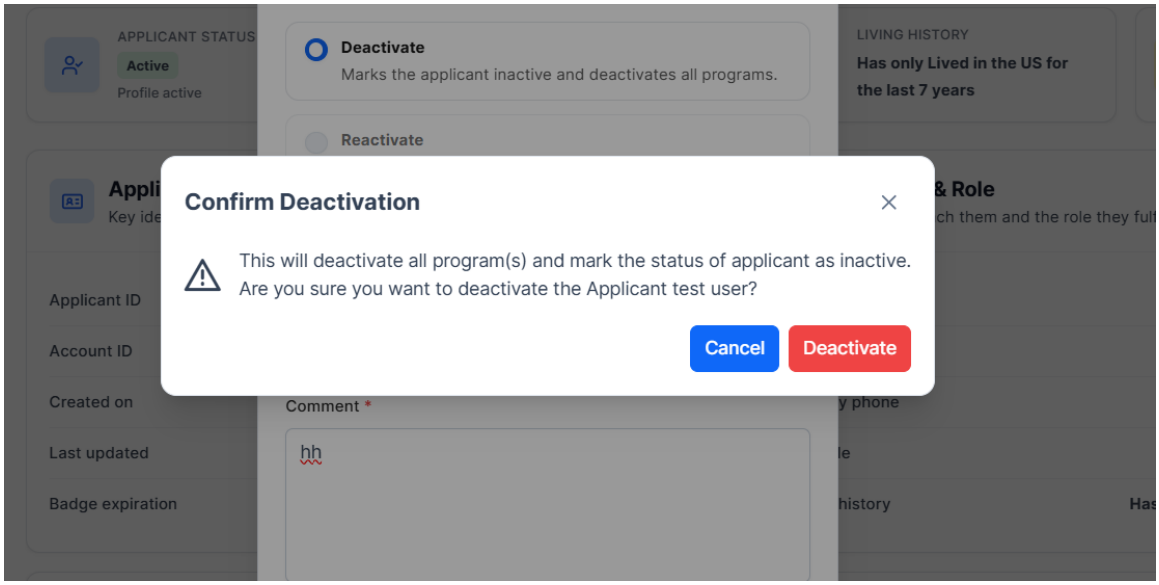
The progress tracker shows five stages: Background, Training, Testing, Photo, and Badge. Each stage turns green as the process completes. The final component, Badge, generates when all other components have successfully been completed.

**The background report may show red as well, if there is something on the report that requires review. This is normal and does not require action on your part.

Deactivating or Reactivating an Applicant



The profile includes a Deactivate/Reactivate action in the top toolbar. Selecting it opens a dialog where you can deactivate an applicant (marking them inactive and deactivating all programs) or reactivate a previously deactivated applicant. A comment explaining the reason is required.



After entering a comment and selecting Continue, a final confirmation notification appears. Select Deactivate to confirm, or Cancel to go back.

Moving an Applicant

If an applicant needs to be transferred from one location to another within your account, follow the steps below:

- From the main (parent) account, use the Location Hierarchy dropdown to navigate to the location where the applicant is currently assigned.
- Locate and select the applicant to open the Applicant Card.
- Click More, then select Move Applicant.
- In the pop-up window, select the destination location from the dropdown menu.
- Click Move Applicant to complete the transfer.

💡 Important: The following requirements must be met before an applicant can be moved:

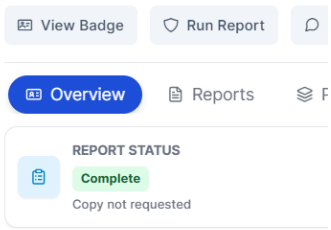
- ✓ The applicant must be in completed status and have a valid, generated badge.
- ✓ The applicant must be in active status.
- ✓ The move must be initiated while logged into the main (parent) account.

This process transfers the applicant to the selected location while preserving the applicant's existing records and badge information. To update the location information on the applicant's badge, please reprint the badge. The badge will be shipped to the shipping address for the new location, and your account will be billed.

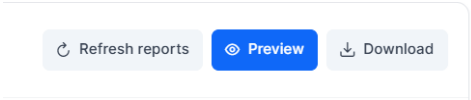
View Reports

Once an applicant's report has been completed, you can review it directly from the Applicant Card.

- From the Applicants screen, click the applicant's name to open the Applicant Card.
- Click Reports.



- Select the report you would like to review.
- Click Preview to view the report in your browser or click Download to save a PDF copy to your computer.



The status displayed for each report indicates its current stage in the screening process:

Completed – The report has been finalized and is available for review.
In Progress – The report is still being processed and is not yet complete.
Rejected/Errored/Failed – An issue occurred during processing, and the report requires attention.

💡 Tip: If a report is still marked In Progress, check back later or refresh the applicant's report list to view the most current status.

Applicant History and Notes

History

The History section provides a chronological audit trail of activity related to an applicant. This includes actions performed by contractor users, railroad personnel, applicant users, and our internal team.

To view an applicant's history:

1. From the Applicants screen, select the applicant to open the Applicant Card.
2. Click History.

By default, history entries are displayed from the newest to the oldest. Each entry includes:

- The date and time the action occurred.
- The user or system responsible for the action.
- A description of the action performed.
- The organization associated with the action, displayed on the right side of the entry.

History can be used to track a wide range of applicant activity, including profile updates, report orders, status changes, password resets, badge generation, and other system events.

Filtering History

To help locate specific events, the History page includes several filtering options:

- Category Filter – Filter history by event type, such as applicant updates, report activity, password changes, and other system actions.
- Date Range Filter – Limit results to a specific date range.
- Keyword Search – Search for specific text within history entries.

Exporting History

Click Export CSV to download the applicant's history as a CSV file for reporting, auditing, or recordkeeping purposes.

Notes

The Notes section allows authorized users to create and review free-form notes related to an applicant.

To access notes:

1. From the Applicants screen, select the applicant to open the Applicant Card.
2. Click Notes.

Unlike History, which records system-generated events and user actions automatically, Notes are manually entered by users and organizations involved in the applicant's onboarding and screening process.

Examples of notes may include:

- Additional information related to an applicant's record.
- Documentation requests during an appeal process.
- Internal support activity, such as IT ticket documentation.

Filtering Notes

The Notes section includes filtering options to help you find relevant entries:

- Note Type Filter – View only specific categories of notes.
- Date Range Filter – Limit results to a selected period.
- Keyword Search – Search note content for specific text.

Exporting Notes

Click Export CSV to download the applicant's notes as a CSV file.

💡 Best Practice

History and Notes serve different purposes and do not always contain the same information. History records system activity and user actions, while Notes contain manually entered comments and observations. When researching an applicant's record or troubleshooting an issue, we recommend reviewing both sections to ensure you have the complete picture.

Report Review Process for Program Approval/ Denial, Appeal, and Dispute

Applicants may be denied access to the eRailSafe US program due to the following:

- History of felony and/or misdemeanor convictions of concern
- Probation within the last five years

- Incarceration within the last five years
- Any pending felony and/or misdemeanor charge
- Active warrants
- Open or undisposed court cases
- SSN discrepancy or possible name mismatch

Appeals

The appeal process becomes available when one or more railroad programs place an applicant Under Review based on information contained in the applicant's background report. At that time, the applicant receives a Pre-Adverse Action Letter outlining the appeal process and available options.

Applicants or their administrators have 15 calendar days from the date of the railroad's preliminary decision to initiate an appeal. If an appeal is started, an additional 15-day documentation period begins, allowing supporting documentation to be submitted for review. Once the documentation period has ended, the appeal is forwarded to the appeal committee for each railroad program involved. Each railroad conducts an independent review and renders its own final decision.

Supporting Documentation

Applicants are encouraged to provide any documentation that may assist the railroad in evaluating the appeal. Examples include:

- Official court records related to the offense(s) under review.
- Letters or statements from current or former probation or parole officers addressing compliance with court-ordered requirements.
- Character or reference letters from employers, coworkers, family members, friends, or community members.
- Certificates of completion for educational programs, treatment programs, counseling, or other relevant courses, whether court-ordered or completed voluntarily.
- Any additional documentation that demonstrates rehabilitation, compliance, or mitigating circumstances, including an applicant statement.

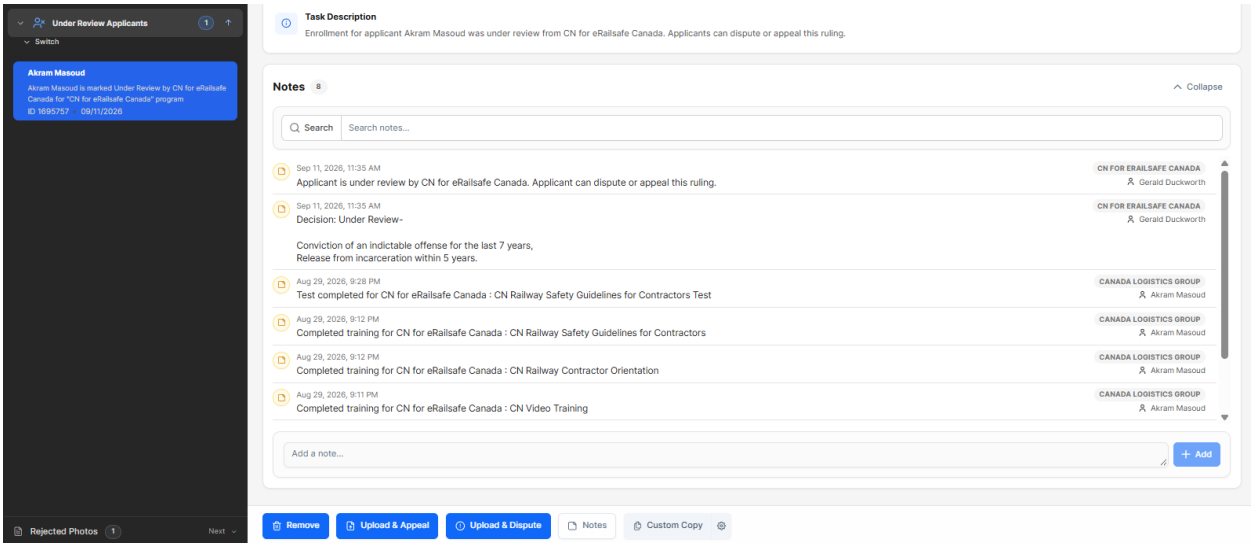
Railroad Review Process

Each railroad company reviews appeals independently and applies its own evaluation criteria. As a result, appeal outcomes may vary between programs.

If one or more railroad programs approve the appeal, a badge will be generated for the approved programs. Any programs that deny the appeal will remain unavailable to the applicant, while approved programs will be reflected on the applicant's badge.

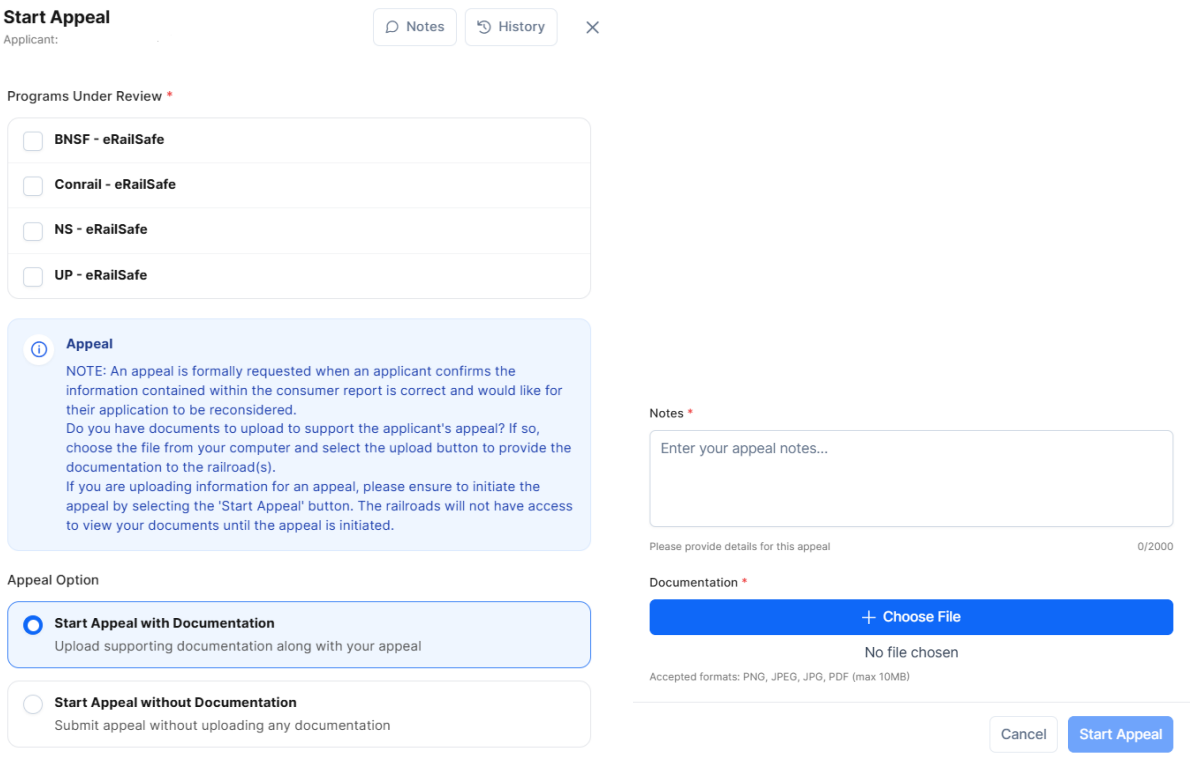
⚠️ Important: Because each railroad evaluates appeals independently, an approval or denial from one railroad does not guarantee the same outcome from another railroad reviewing the same appeal.

When a railroad places your candidate under review, a Required Task will be populated and you will have the option to Appeal, Dispute, or Deactivate the applicant from the task. Each of these actions can be performed from this view or by navigating directly to the applicant in question.



To initiate an appeal on behalf of your applicant after being placed under review, please take the following steps:

- Select the applicant from your Applicants page to open the Applicant Card.
- Click More and select Appeal.
- Check the boxes representing the railroads that have placed the applicant under review.
- Choose the option indicating whether you are uploading documentation at this step or not.
- Enter a reason for appeal.
- Upload documents if appropriate.
- Click Start Appeal.



Disputes

Applicants have the right to dispute inaccurate or incomplete information appearing on their background report under the **Fair Credit Reporting Act (FCRA)**. A dispute should be initiated when an applicant believes information contained in the report is incorrect, incomplete, or does not belong to them.

When a dispute is filed, we are legally required to conduct a **reinvestigation** of the disputed information. During this process, we work with the reporting source(s) to verify the accuracy of the information and determine whether the original report should be confirmed or corrected.

The dispute process may take **up to 30 days** to complete. While a dispute is under investigation, no final eligibility decision can be made for or against the applicant based on the disputed information.

Initiating a Dispute

If an applicant believes their background report contains inaccurate or incomplete information, they should contact our **Support Team** to initiate the dispute process.

Our team will review the reported concerns and provide guidance on the information and documentation needed to begin the reinvestigation.

Impact on Other Workflows

⚠️ **Important:** Filing a dispute will take precedence over all other review processes, including appeals. Once a dispute has been opened, the applicant's record enters the reinvestigation process, and other workflows may be paused until the dispute has been resolved.

For this reason, if you are attempting to submit additional documentation for an appeal or are unsure whether an appeal or dispute is the appropriate course of action, please contact our Support Team before initiating a dispute in the system.

💡 **Best Practice**

Appeals and disputes serve different purposes. An **appeal** asks a railroad to reconsider an eligibility decision based on mitigating information or evidence of rehabilitation. A **dispute** challenges the accuracy or completeness of information contained in the background report itself. If you are uncertain which process applies to your situation, contact Support for assistance before acting.

Reset Applicant Login Credentials

If an applicant is unable to access their account, you can reset their password directly from the Applicant Card. The system provides two password reset options: a soft reset and a hard reset.

Soft Reset (Send Reset Instructions)

A soft reset is the recommended option in most situations.

- Open the applicant's Applicant Card.
- Click More and then choose Reset Password.
- Select Send reset instructions.
- Click Reset Password.

The applicant will receive two emails at the email address on file:

- One email containing their username.
- One email containing a temporary password.

Both emails include a link to the platform where the applicant can log in and reset their password.

Hard Reset (Set a Temporary Password)

A hard reset allows you to create a temporary password on behalf of the applicant.

1. Open the applicant's Applicant Card.
2. Click ‘Reset Password.’
3. Select ‘Set a temporary password.’

4. Enter a temporary password.
5. Click ‘Reset Password.’
6. Provide the temporary password directly to the applicant.

The applicant will use the temporary password to log in and regain access to their account.

💡 Best Practice: For security purposes, temporary passwords created through a hard reset should be shared directly with the applicant and should not be sent through unsecured channels.

Managing Applicant Training and Testing

Training and testing are assigned automatically when an applicant is enrolled in one or more railroad programs during the applicant creation process. The specific training and testing requirements assigned to the applicant are determined by the railroad program(s) selected during enrollment. Once the applicant record is saved, the assigned training and testing become immediately available.

Applicant Access

After enrollment, the applicant receives two separate emails:

- One email containing their username.
- One email containing a temporary password.

Upon their initial login, applicants will be required to:

- Complete multi-factor authentication (MFA).
- Set up security questions.
- Create a new password for future access.

Applicants can complete their assigned training and testing from virtually any device, including:

- Desktop computers
- Laptops
- Tablets
- Mobile devices

💡 Good to Know: The new eRailSafe platform has been optimized for mobile devices, allowing applicants to complete training and testing from wherever is most convenient.

Monitoring Training and Testing Progress

You can monitor applicant progress directly from the Applicant Management page and Dashboard using the applicant workflow indicators.

The Training and Testing stages are represented by the second and third status indicators in the applicant progress tracker.

The status indicators provide a quick visual reference:

- **Gray:** The applicant has not started the assigned training or testing.
- **Yellow:** The applicant is actively working on training and/or testing.
- **Green:** The applicant has successfully completed the required training and testing.

Reviewing these indicators regularly can help you identify applicants who may need reminders or additional assistance completing their requirements.

Training and Testing Completion

Once your applicant completes their assigned training, testing becomes available.

If training and testing are the final remaining requirements for an applicant, meaning:

- Their background reports have been completed and approved, and
- Their badge photo has been uploaded and approved, their badge will be generated automatically as soon as all required training and testing tasks have been completed.

Program Cancellation After 90 Days

Your applicants are expected to complete their assigned training and testing requirements within 90 days of enrollment.

If an applicant does not complete the required training and testing within 90 days, the system automatically moves them into a **Program Cancelled** status. This action is required to maintain compliance with railroad program requirements.

When Program Cancelled status is applied:

- The applicant is automatically deactivated for program participation.
- The applicant's enrollment is no longer considered active.
- Additional action is required before the applicant can continue in the program.

💡 **Optional Notifications:** If you would like advance notice of applicants approaching Program Cancelled status, you can opt in to receive notification emails. These notifications are sent when an applicant is within 15 days of automatic cancellation.

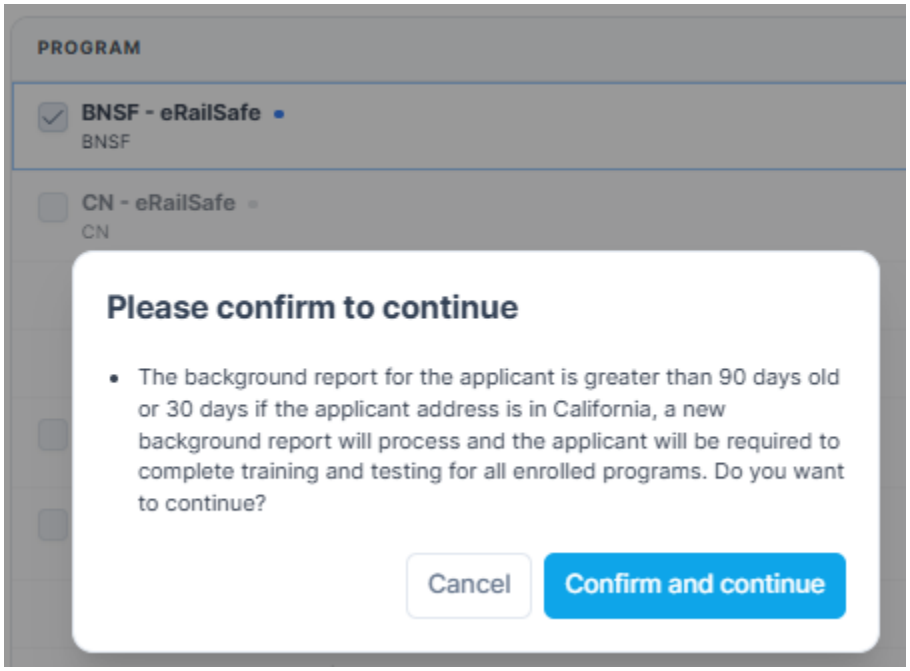
To enable these notifications for your account, please contact Customer Support at **1-800-560-6435** or via email at customer.support@everifile.com.

Re-Enrolling a Program Cancelled Applicant

If one of your applicants has entered Program Cancelled status and needs to continue in the program, you will need to re-enroll them in the required railroad program(s).

To re-enroll a Program Cancelled applicant:

- Open the applicant's profile.
- Select Programs.
- Choose the railroad programs needed.
- Acknowledge the disclosure boxes.
- Click Enroll.
- Acknowledge the pop-up message that explains the billing for the new report.



⚠️ **Important:** Re-enrollment will initiate a new background screening process and applicable fees will be charged.

Restoring Training Tasks

Occasionally, an applicant may accidentally mark a training task as complete before finishing the training material.

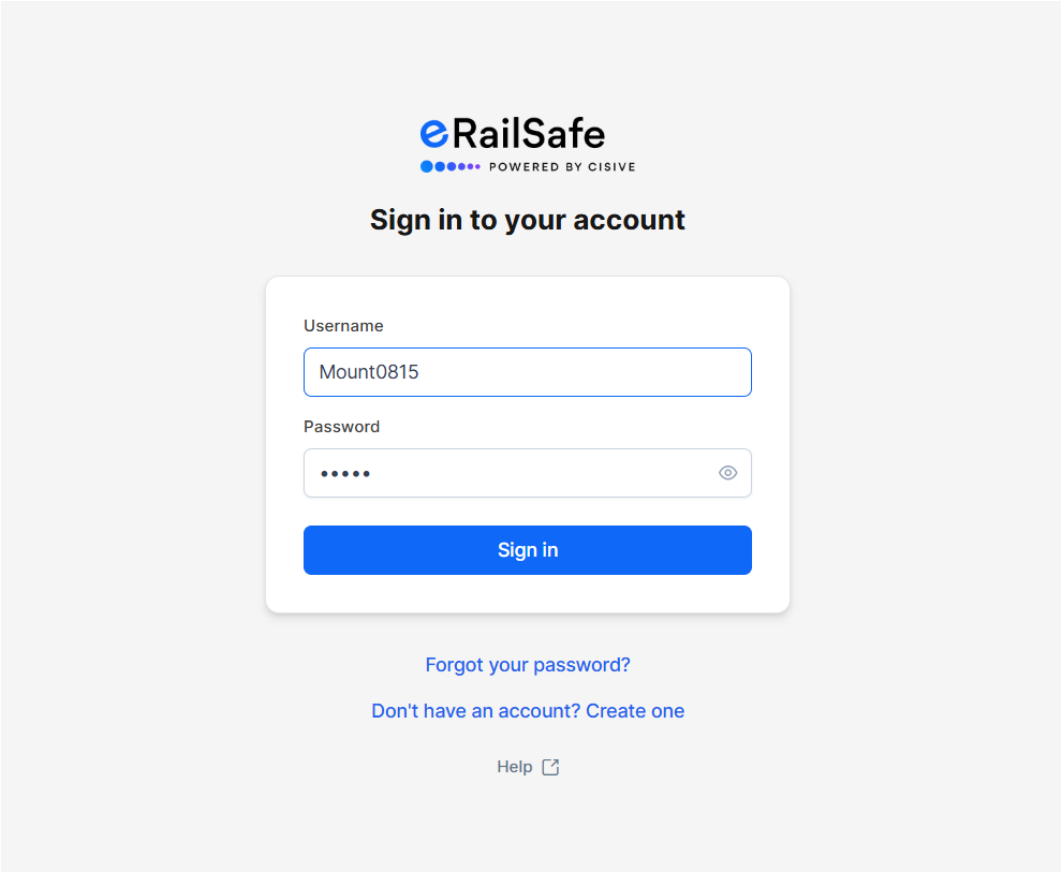
If this happens, the applicant should contact Customer Support for assistance. Our team can restore completed training assignments when appropriate, returning the training task to the applicant's Required Tasks list so it can be completed properly.

⚠️ **Important:** Only completed training tasks can be restored. Applicants must contact Support directly to request this action.

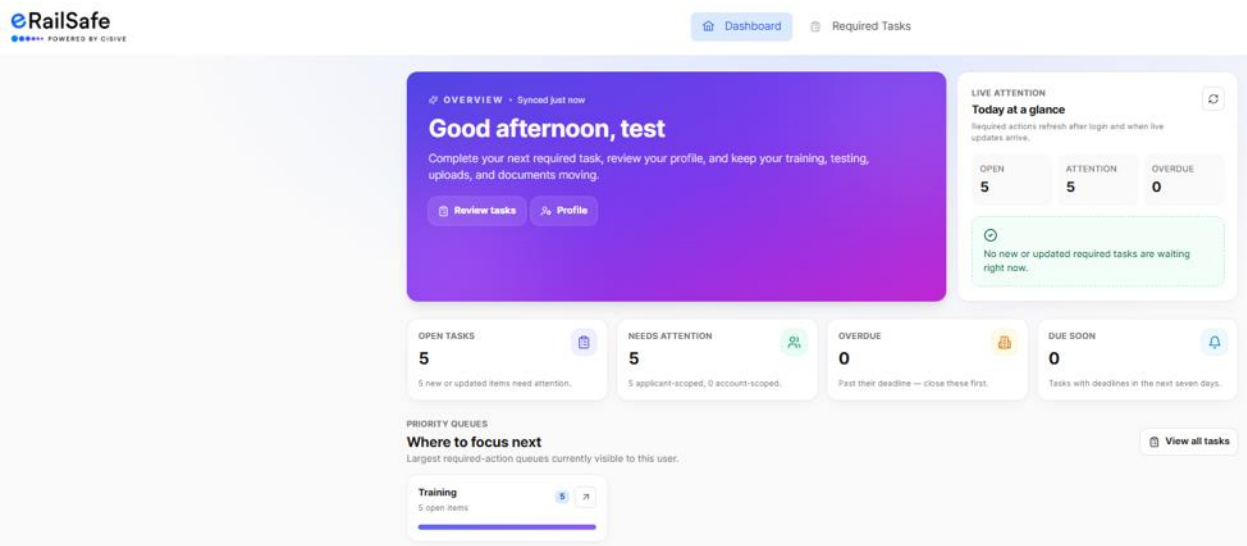
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The Applicant Experience

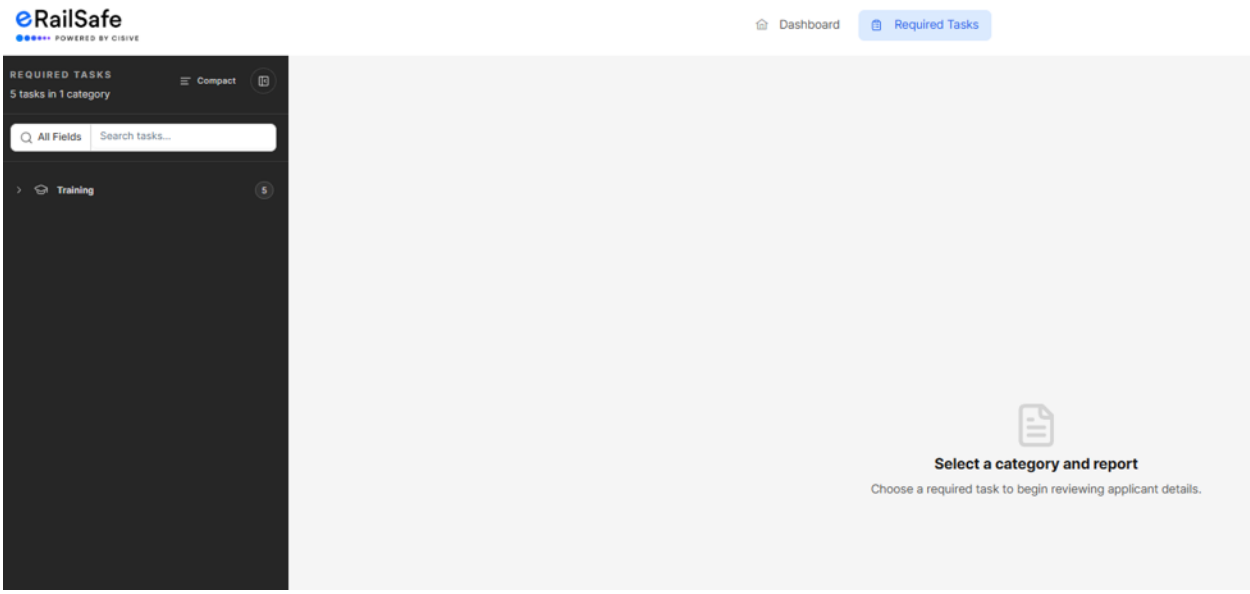
It's helpful to know what your applicants will see once they're added to the system, since they'll complete several steps on their own.

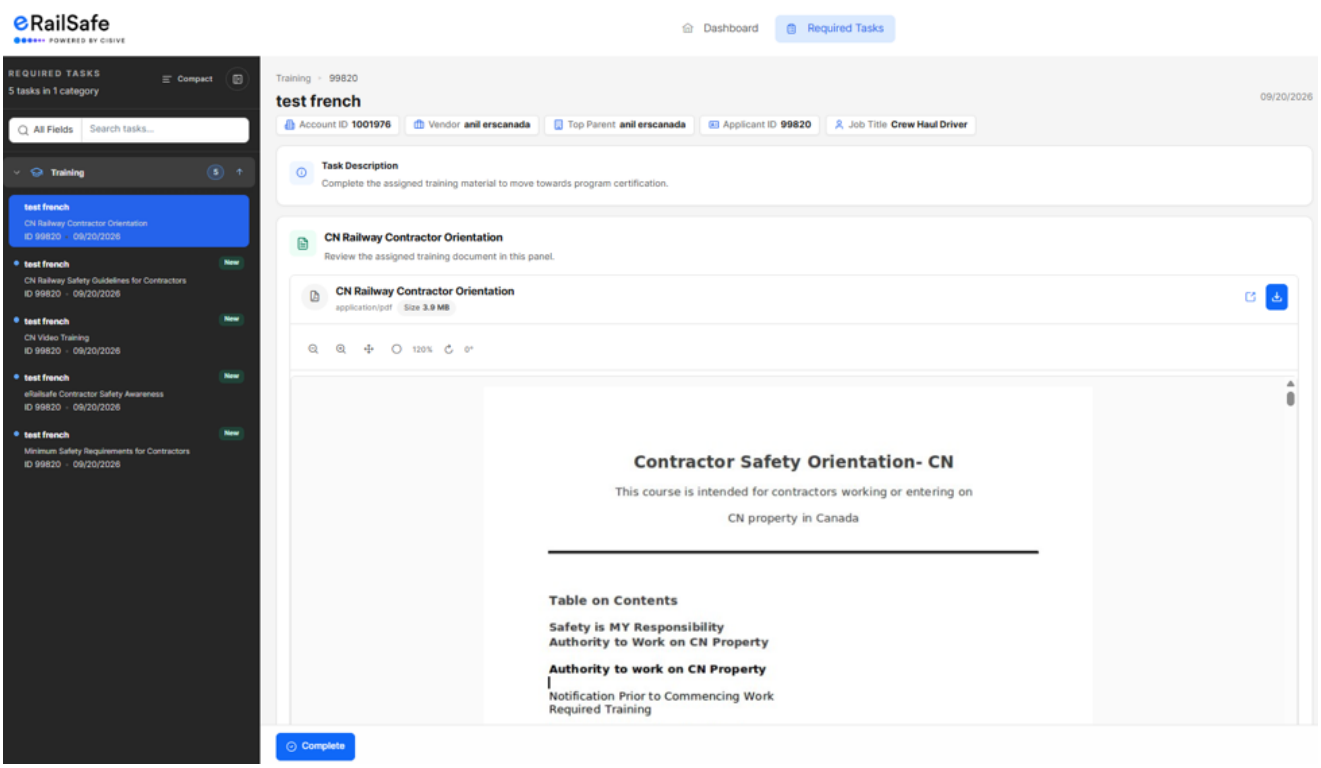


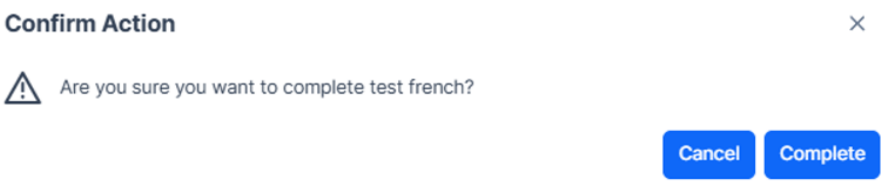
This is the applicant-facing login page. Once added, each applicant receives their credentials by email and signs in here to complete their part of the process: training and testing.



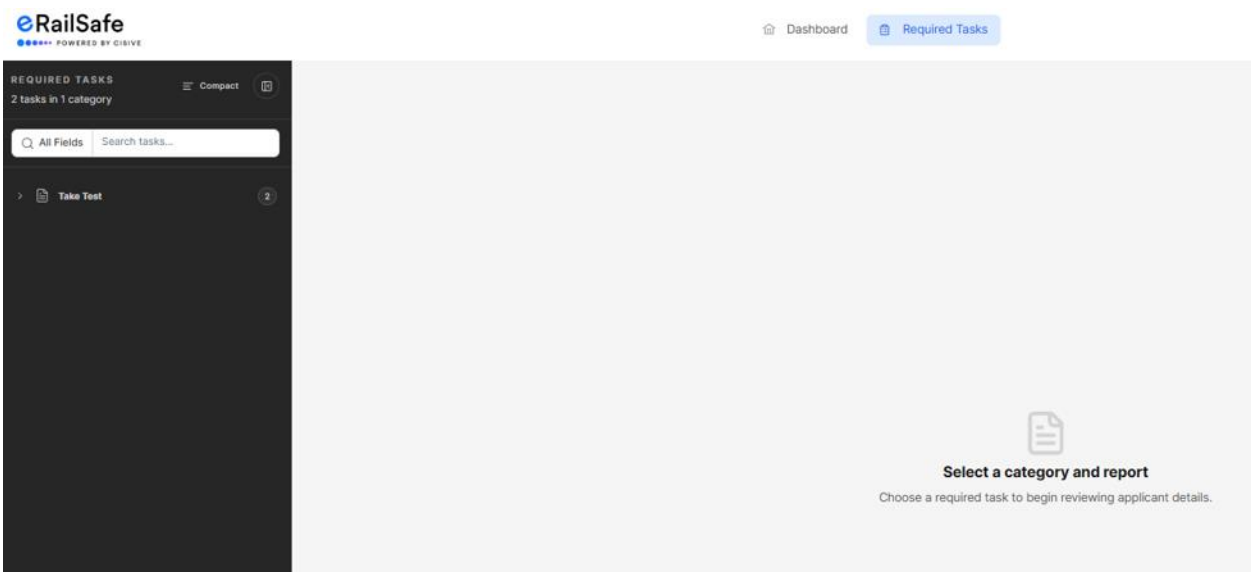
Once logged in, the applicant lands on their own Dashboard, similar in layout to the admin view but includes just their tasks. Their navigation is simplified to Dashboard and Required Tasks, and their queue shows only what's relevant to them, for example, a pending Training task.



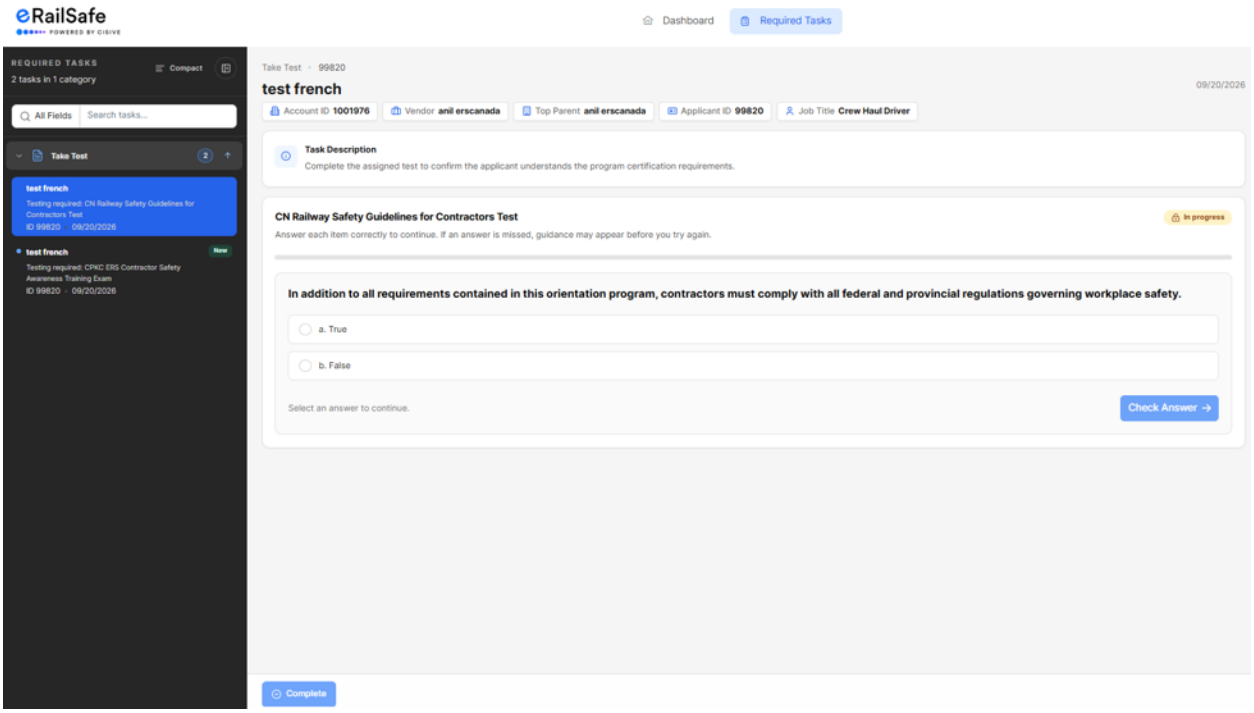




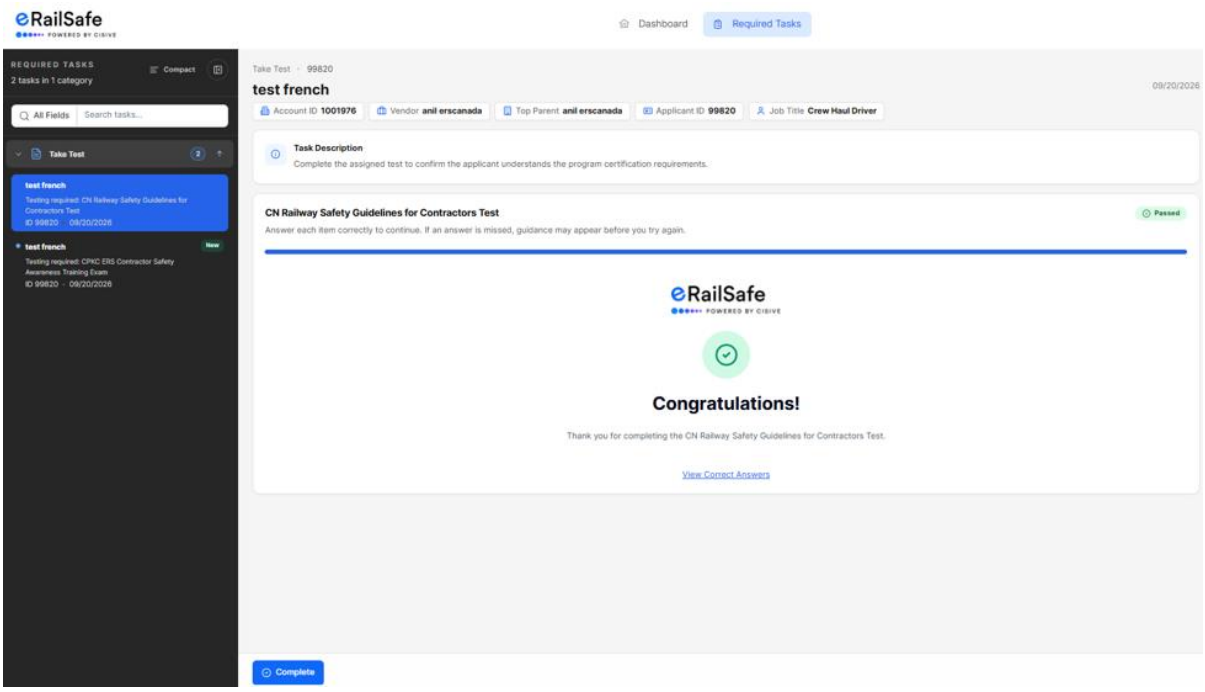
Selecting Required Tasks shows the applicant their assigned tasks. Training content varies depending on the railroad program they're enrolled in. Once training is complete, the applicant selects Complete to mark the task done.

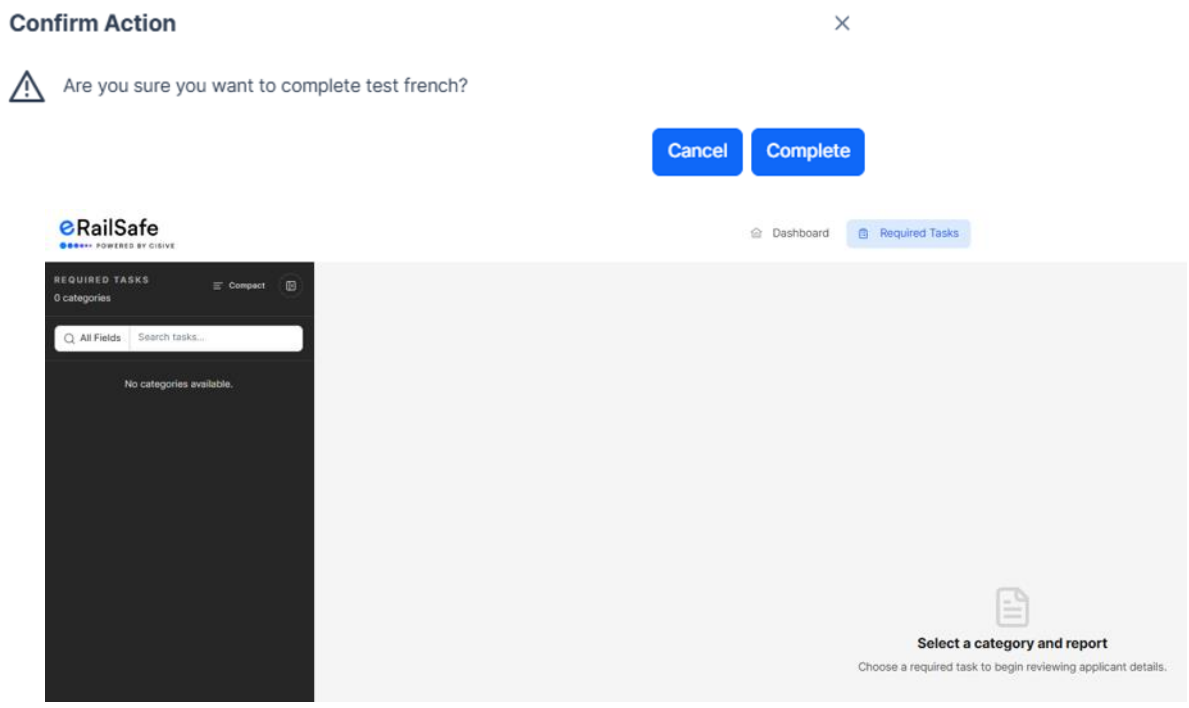


Once training is marked complete, a confirmation appears and the next task, Take Test, becomes available. Testing only unlocks after training is completed.



The test presents multiple-choice questions related to the program's certification requirements. If the applicant doesn't meet the passing score, a message is shown with the option to retake the test.

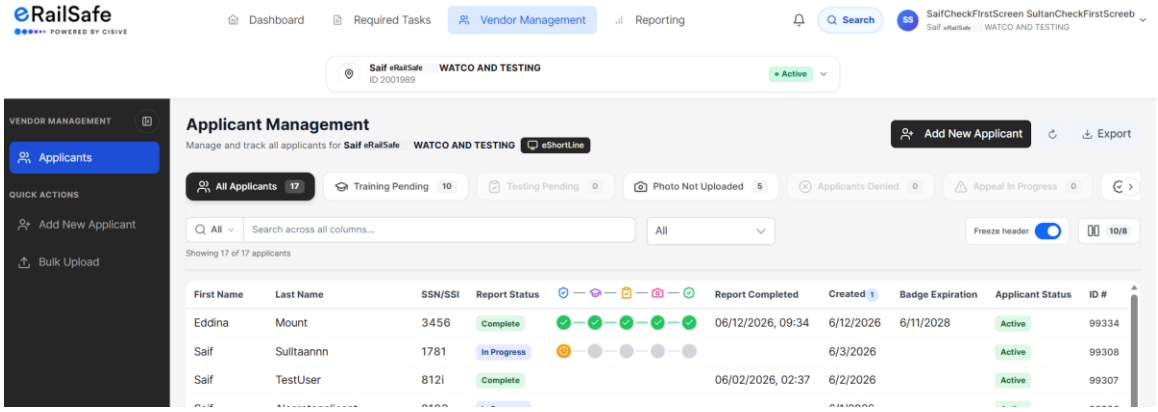




A confirmation prompt appears, and once confirmed, the applicant's Required Tasks queue is empty, indicating all assigned tasks for their program are complete.

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Badge Generation



Back on your side, the same 5-stage progress tracker is visible for each applicant in your list. Once every stage shows complete (fully green), the applicant is ready for badge generation.

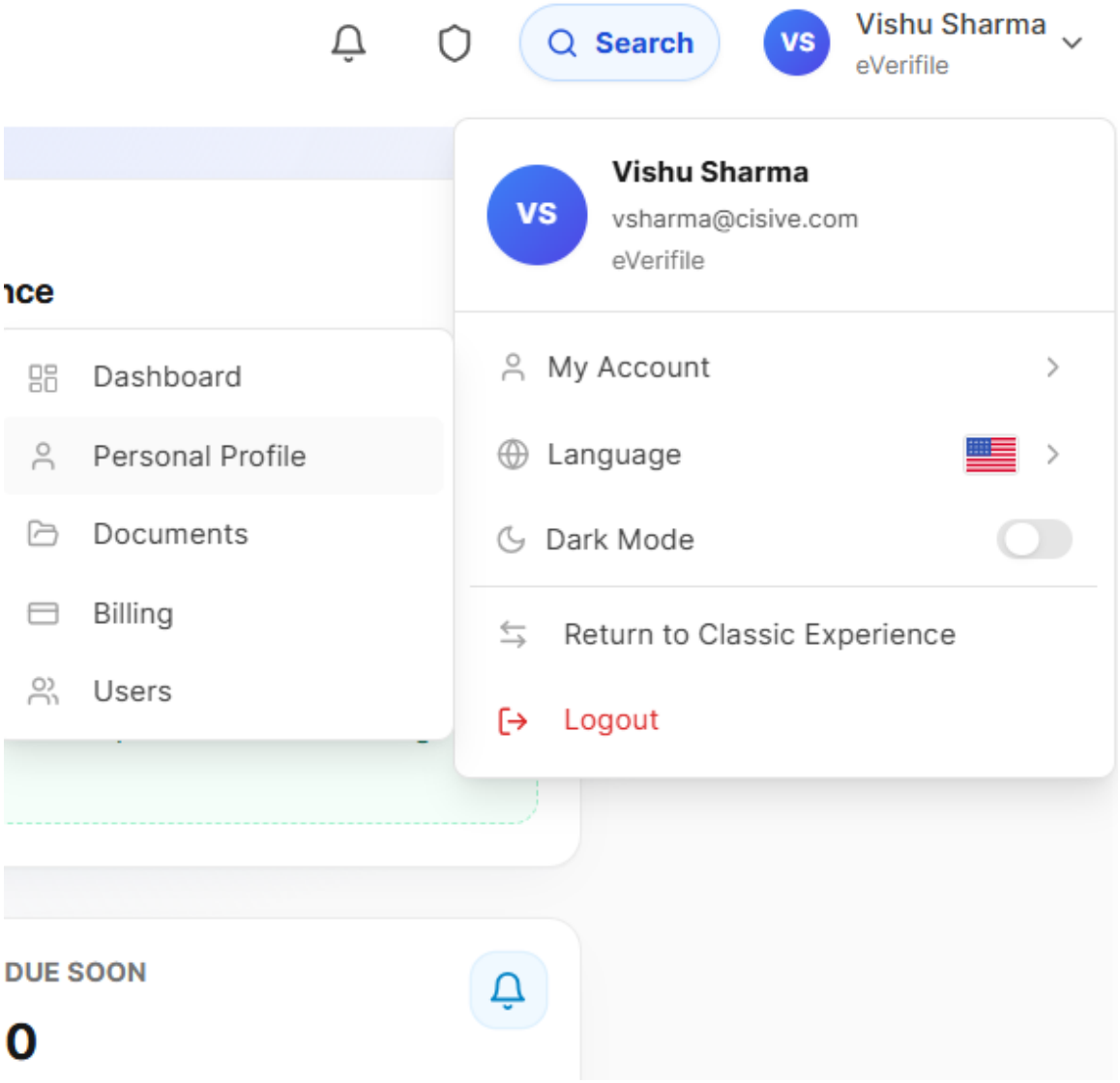
Selecting View Badge from the applicant's profile opens their generated badge — a PDF showing the applicant's name, photo, vendor organization, address, applicant ID, issue date, expiration date, and a certification statement confirming they've passed the program's screening requirements.



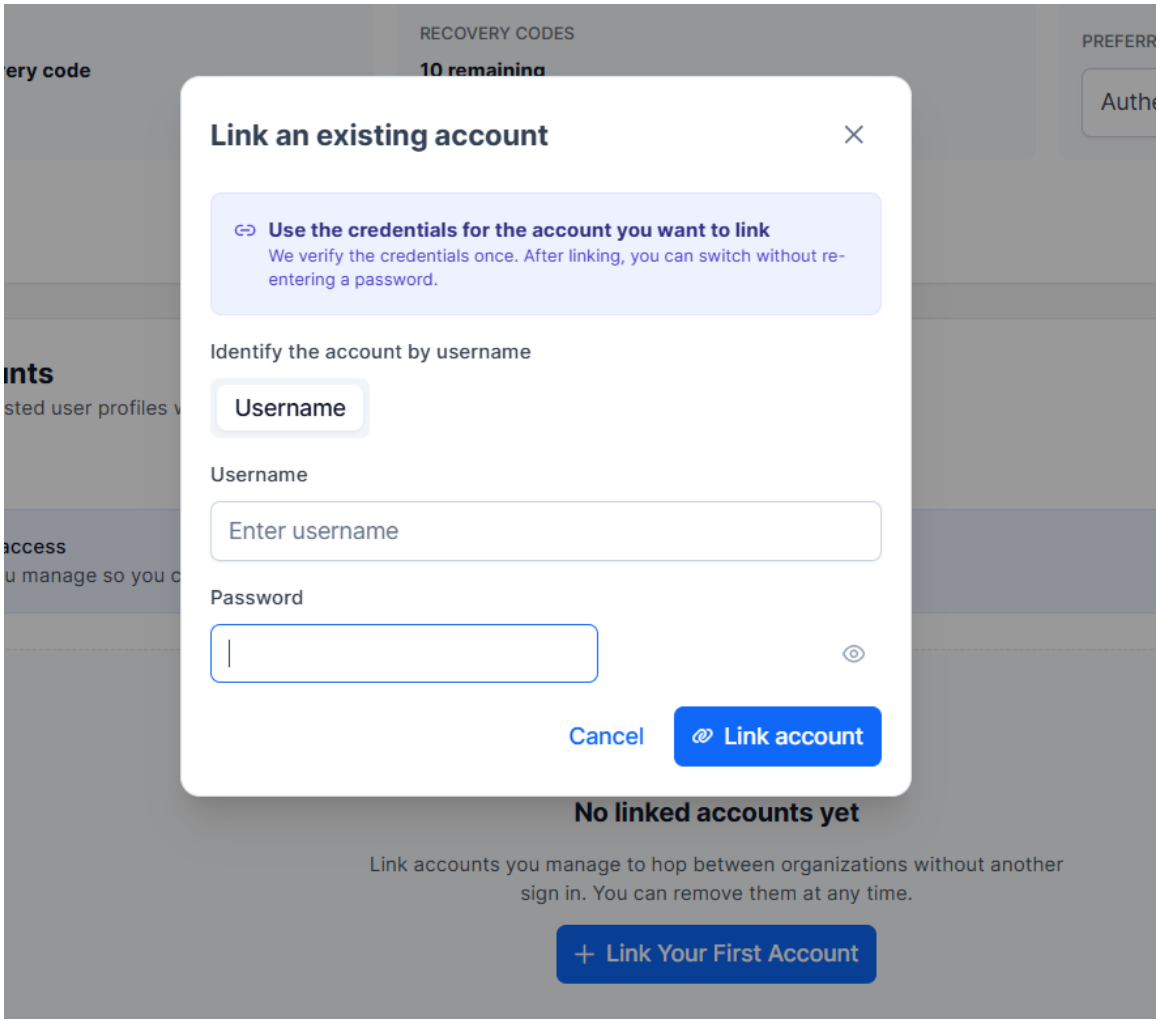
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Managing Linked Accounts

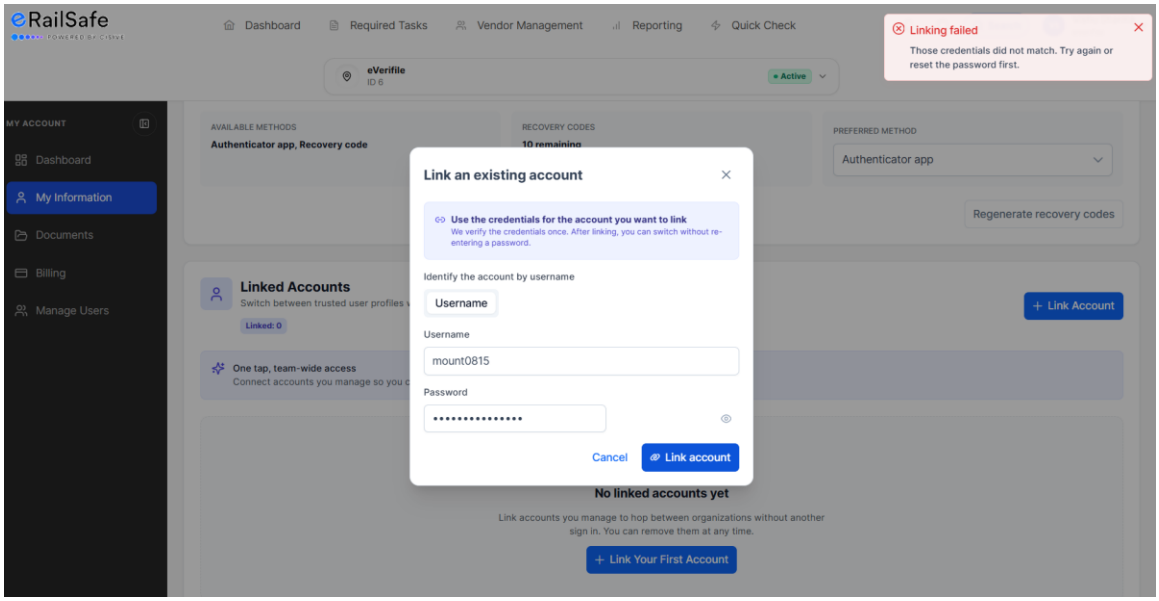
Selecting the user avatar in the top right opens a dropdown with several options: My Account, Personal Profile, Documents, Billing, Users, Dark Mode toggle, Language, and Logout.



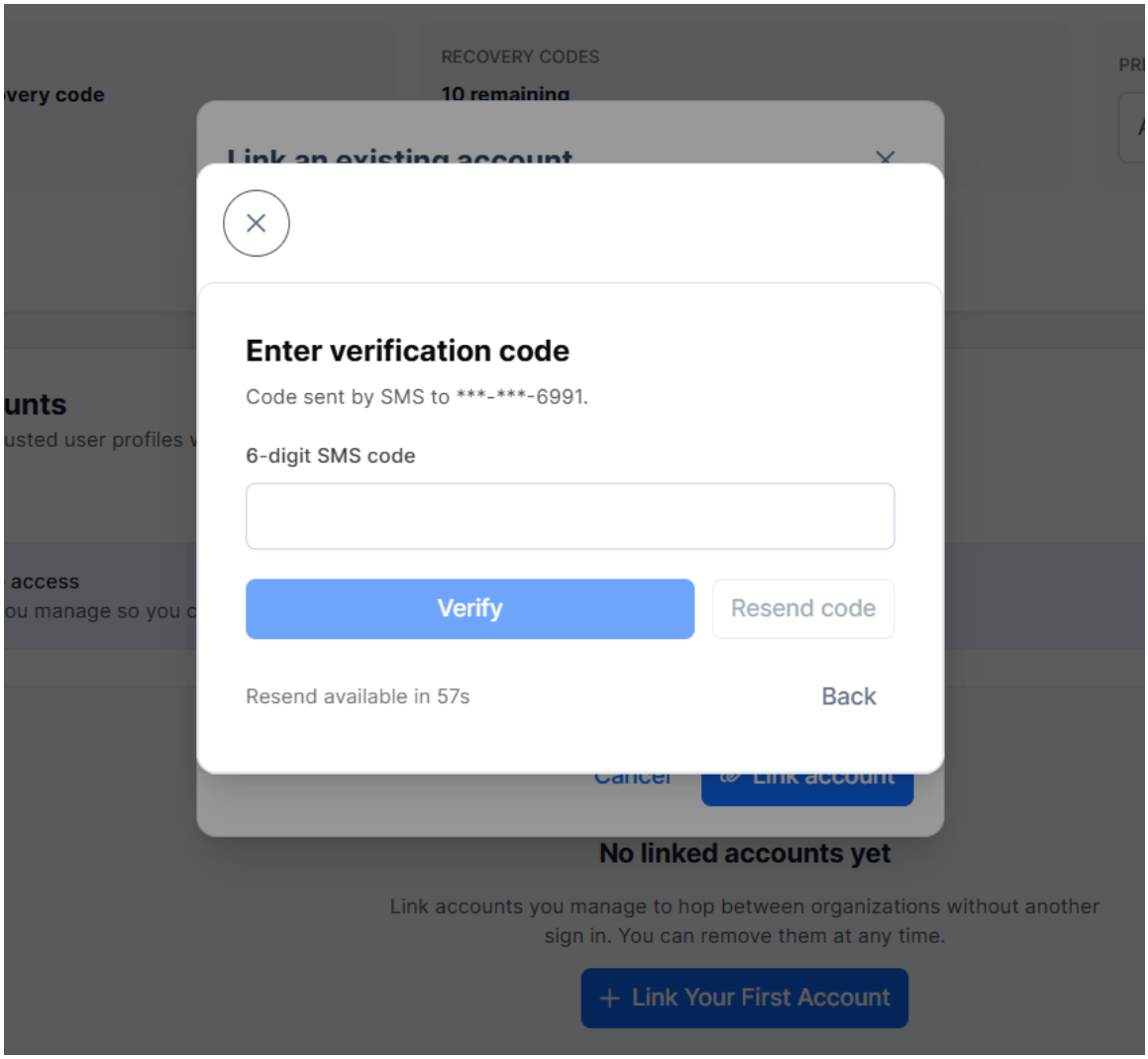
Selecting My Account takes you to your account settings page. Scrolling down reveals the Linked Accounts section; this feature lets you switch between trusted user profiles without signing in again. You can link multiple accounts you manage and move between them instantly with one selection, no re-authentication needed.



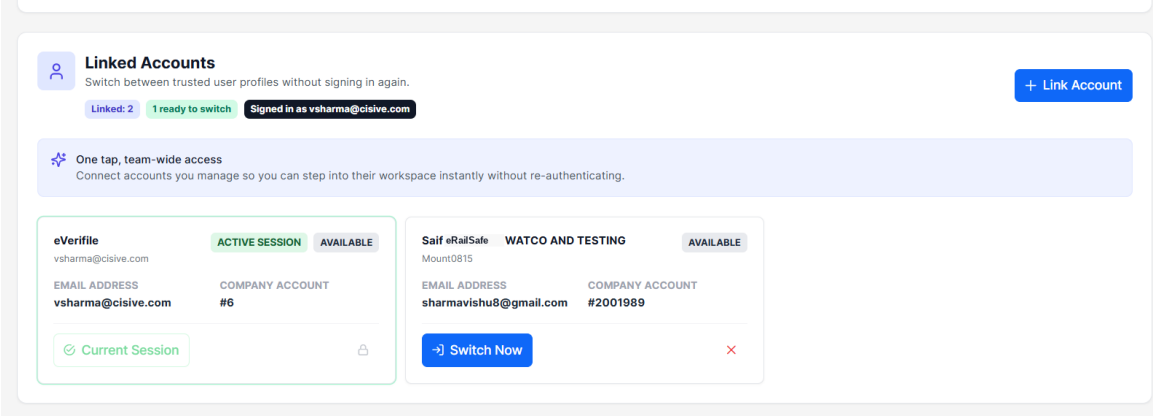
Selecting Link Account opens a dialog where you enter the username and password of the account you want to link. Credentials are verified once and after that, switching between linked accounts requires no password.



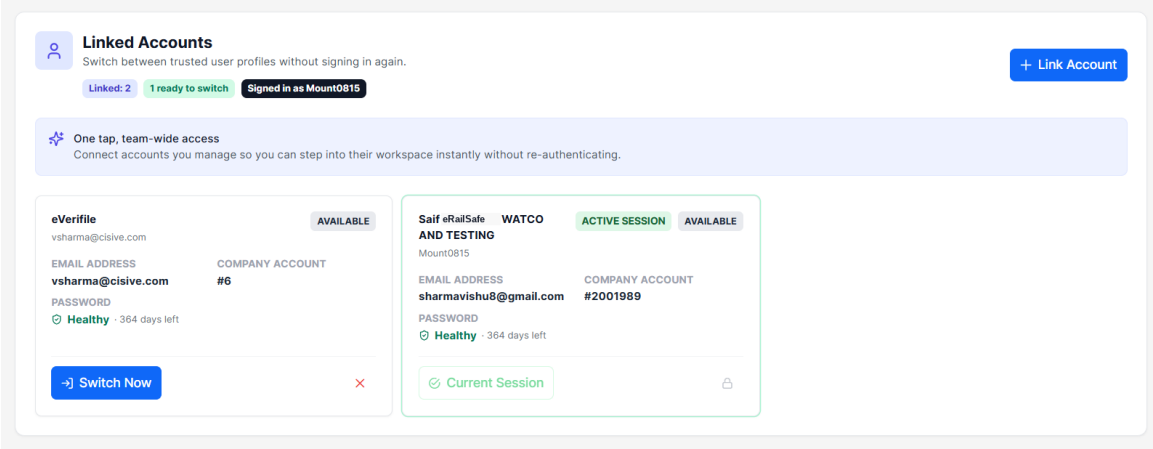
If the credentials don't match, a Linking Failed error appears. You can try again with the correct credentials or reset the password first.



Once the correct credentials are entered, a 6-digit verification code is sent by text to the phone number on file. Enter the code to complete the linking or select Resend Code if needed.



Once verified, the linked account appears in the Linked Accounts section, showing your current session and the linked account side by side. Selecting Switch Now jumps into that account instantly without signing in again. The red X removes a linked account.



After switching, your active session flips to the other account, and the original account shows Switch Now to go back. Each card also shows a password health status with days remaining.

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