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Introduction

This guide is a comprehensive user manual that details how to use ServiceNow. The sections are divided by person and objective, and include a guide to using the ND Gateway Portal to request a background check, using the portal as a requesting agency contact or child care provider contact, processing background check cases and related records as CBCU staff, and managing schedules and appointments as fingerprinting technicians. It also contains instructions for accessing data, creating reports, and modifying system properties and configuration settings as appropriate.

Note: Citizen information shown in screenshots is fake data that does not belong to a real citizen.

Section 1: ND Gateway Navigation

Part A: Introduction

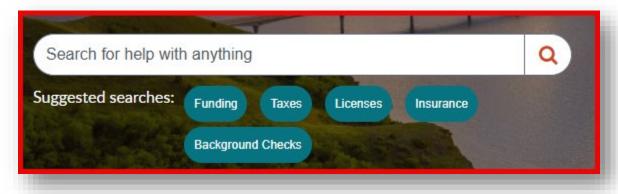
This section outlines the features of the ND Gateway, which is the citizen-facing portal for state services. Throughout this manual, it may be referred to as "the Gateway" or simply "the portal".

The ND Gateway (which can be accessed by entering this address: ndgateway.nd.gov) is a relatively new offering from the State of North Dakota and is supported by NDIT. The main components of the portal existed prior to the CBCU Case Management project. This manual will focus solely on elements that were updated or created to support the needs of CBCU's user base.

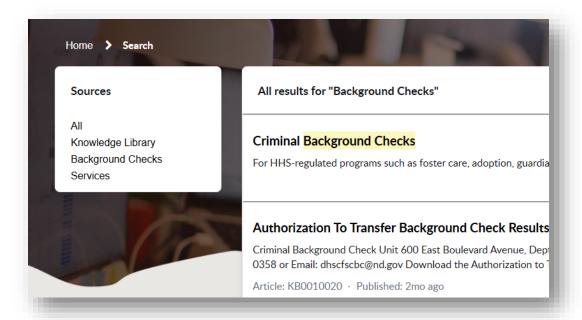
Constituents may visit the portal directly or may be linked to it from emails or other websites such as the CBCU webpage.

Part B: Searching and Navigation

1. People can use the search bar in the middle of the screen to enter text or select from the suggested searches.



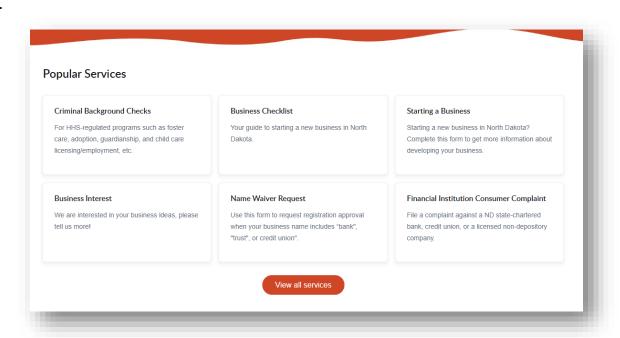
2. Searching will look for matches based on keyword or record number and will display a list of results from the Service Catalog and the Knowledge Library. Logged in users will also be able to locate records (cases) they have created that match the keyword or the record number entered.



Back on the home page, there is a Popular Services section that contains links to the most viewed services.

Note: This is based on usage and will dynamically adjust based on popularity of background check requests and other forms so what's shown here may change over time.

3.



Part C: Account Creation & Login

 Public users (those who have not authenticated/logged in) can view select information such as knowledge articles and complete some forms. However, to view and submit a Criminal Background Check request, they must be logged in. 2. Clicking on the service will prompt them to login if they have not yet done so.

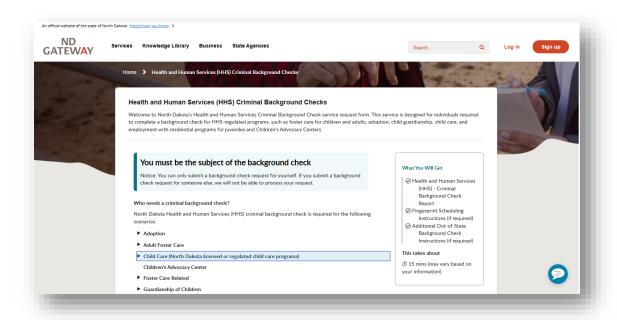
Note: For details on account creation and login, refer to NDIT documentation.

3. Because the Background Check Request form is not available until someone logs in, CBCU requires an overview page with information about "who" needs a background check as required by law, HHS's authority to process, and the subject' legal rights. People may encounter this page if they click a link to it from the CBCU webpage.

Note: When creating a link from the CBCU webpage (or in other communication) to the Criminal Background Check request form, use this link:

https://ndgateway.nd.gov/gsp?id=form_landing&rp_id=01913a9d87ce6250aa96fdd9cebb35ef

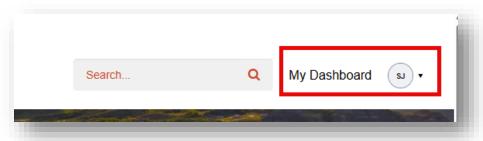
4. This page, shown below, provides the same overview information that is featured on the first page of the form when people select it from the service catalog. This provides constituents the reassurance that they landed in the right place for background checks and prompts them to **Log** in or **Sign up** to start the process.



5. Upon logging in, they are directed to the form to begin filling it out.

Part D: My Dashboard

1. Users who have logged in will see a link to **My Dashboard** in place of the **Log in** and **Sign up** buttons in the top right corner of the page.



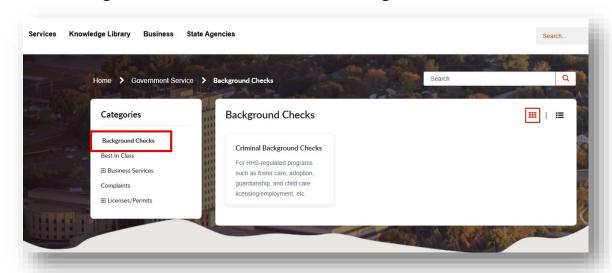
- 2. This page contains the following sections:
 - a. Personal information, Address and Contact details
 - b. My Cases (Covered in Section 9 of this guide)
 - c. My Appointments (Covered in Section 3 of this guide)

Section 2: HHS Criminal Background Check Requests

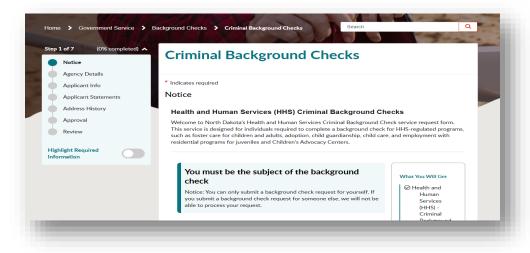
This section details how to submit a background check request along with the follow-up actions that the subject may be required to complete before CBCU can begin processing the request.

Part A: Form Submission

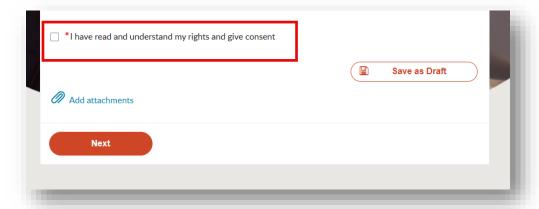
- When clicking on Services in the header menu, the Popular Services page is displayed. Services
 are organized into categories so clicking a category will display only the services associated with
 that category.
- 2. Click on Background Checks and then Criminal Background Checks.



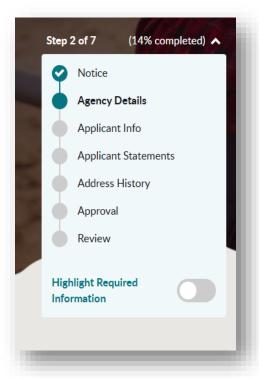
3. The **Notice** section (or form overview page) loads. This contains important notices to ensure constituents understand the reason for this form and agree to the terms.



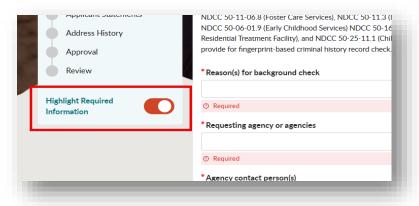
4. To proceed, they must check the box at the bottom of the form and select **Next**.



5. The form is split into sections and contains a progress tracker that updates with check marks for each section completed.



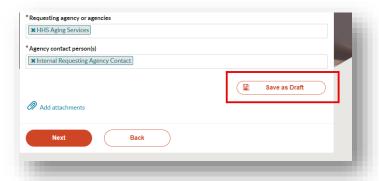
6. Many of the fields on the form are required which is indicated with a red asterisk. Users can toggle **Highlight Required Information** to display a **Required** message next to each field that must be filled in.



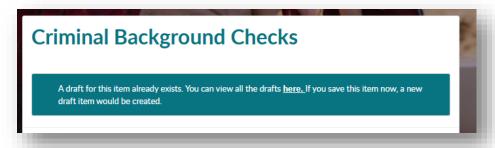
7. Some fields are conditional and will only be displayed if applicable based on previous questions and answers. This is to make the form as short and user friendly as possible.

Note: The portal and the background check request form are designed to adapt to various screen sizes and devices. The layout and functionality of the page and buttons may vary depending on device.

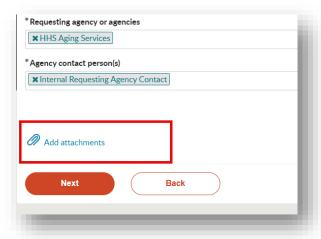
8. To complete the form in more than one session, users can save their progress by selecting **Save** as **Draft**.



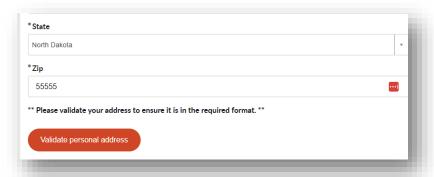
9. Users can navigate back to their draft from **My Dashboard** (covered in subsequent section of this guide) or by selecting **Criminal Background Checks** again from the service catalog. When the form loads, a notice is displayed pointing them to their draft.



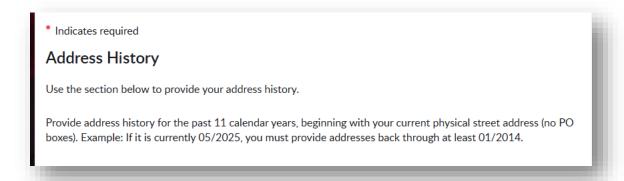
10. Users can add attachments such as supporting documentation at any time by selecting Add attachments. The system accepts PDFs, Word documents, Excel spreadsheets, images, and other common file types.



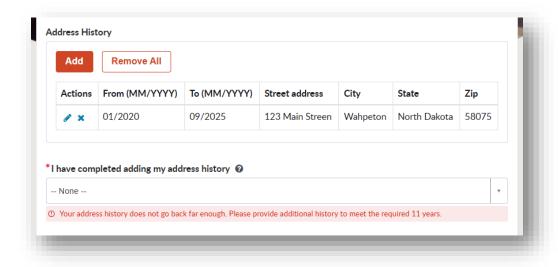
11. This form requires users to validate their address to ensure it meets the USPS-approved format. Clicking on **Validate personal address** leads them through the process.



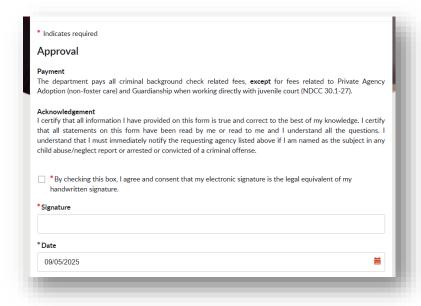
12. In the **Address History Section** of the form, users are required to enter complete address history for a set time period of five or 11 calendar years, depending on the program type/reason for background check. This means that for whatever year they are required to go back to, at a minimum their address history must begin with January 1 of that year.

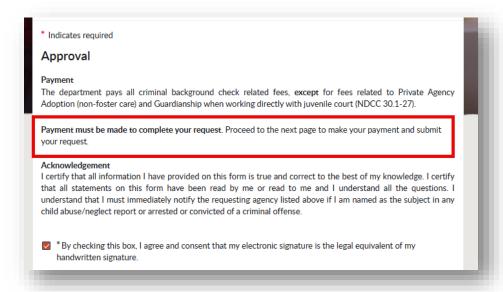


13. When they have completed adding their address history, the system will perform a check to ensure there are no gaps, the history contains the present month, and it goes back far enough. A warning will display if corrections are needed. *Note: While gaps are not allowed, overlapping entries are, to allow for scenarios where someone may have multiple places of residence during the same timeframe.*

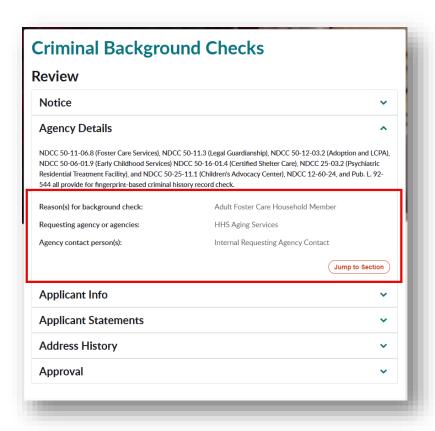


14. The **Approval** section contains a notice about payment. Payment is only required in certain scenarios. If Payment is required, text is displayed indicating next steps. In the first image below, payment is **not** required. In the second, payment **is** required.

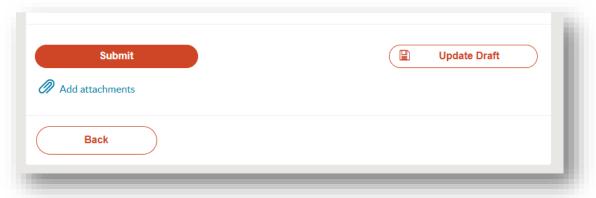




15. The **Review** section allows users to expand each section and review their responses. To make changes, select **Jump to Section**.

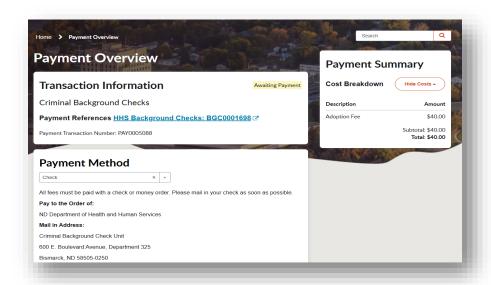


16. If no changes are required, it's time to **Submit**.

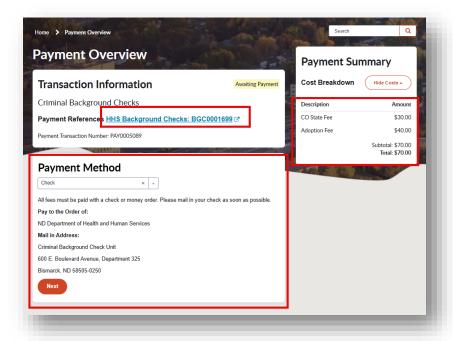


Part B: Payment Overview Page

1. After the user submits the form, if the system determines payment is required, a **Payment Overview** page is displayed. If not, a confirmation page is displayed.



2. The **Payment Overview** page contains a link to their submission, which opens in a new tab. It also contains a summary of fees and instructions for submitting payment. *Note: Initially, payments must be made by check. In the future additional payment methods will be available along with the ability to make payments electronically from this page.*

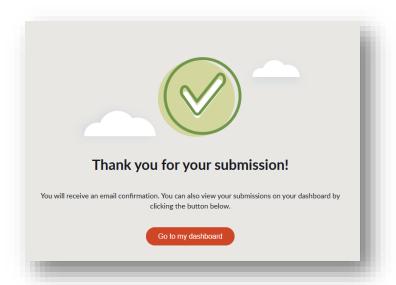


3. After selecting **Next** on the Payment Overview page, the confirmation page is displayed. The page displays payment instructions along with additional next steps. The content on this page is dynamic and will vary based on program type and address history.

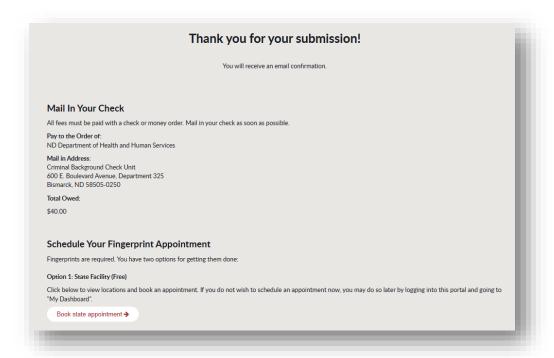
Part C: Confirmation Page and Next Steps

- 1. Depending on the program type and address history, the content displayed on the confirmation page will be dynamic. The following scenarios depict different versions of the confirmation page.
- 2. If there are not any additional steps required by the user (now the Subject of the background check), a simple "Thank you" message is displayed along with a link to view the case on **My**

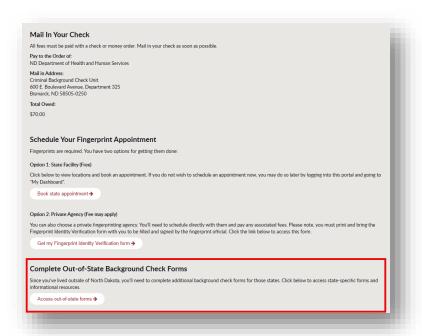
Dashboard.



3. The version of the confirmation page shown below contains payment instructions and information about fingerprinting but does not include instructions about submitting out-of-state forms since the address history was North Dakota only.



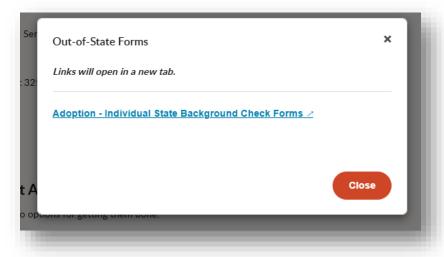
4. The version of the confirmation page shown below includes the same information shown above along with a link to view out-of-state form requirements since the address history included states outside of North Dakota.



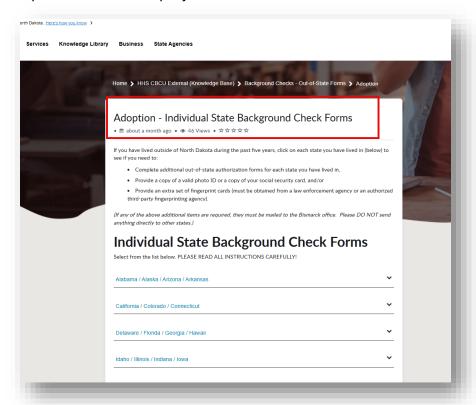
5. If subjects navigate away from the confirmation page, they may return to a version of it (called the **Next Steps** page) by clicking the link in their confirmation email. The content on the page continues to be dynamic and will only display information regarding fingerprinting or out-of-state forms if required and they have not yet completed those tasks.

Part D: Out-of-State Forms

 The Confirmation page or Next Steps page will display a section for out-of-state forms if the subject's address history during the specified timeframe includes addresses outside of North Dakota. Clicking Access out-of-state forms opens a modal that displays a link to the knowledge article containing out-of-state form information for the program(s) they are associated with.



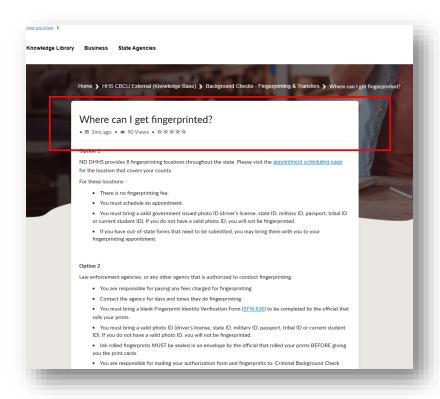
2. Clicking a link opens the knowledge article in a new browser tab. In this example, the adoption article is displayed as shown below.



- 3. Subjects can then expand the appropriate section for the state or states they've lived in previously.
- 4. The content displayed in these articles is maintained by CBCU. Links are to external sites and do not open forms on the ND Gateway.
- 5. Once a subject views one of these articles, the system logs this activity and will not send them a reminder to complete out-of-state form.

Part E: Fingerprinting Options

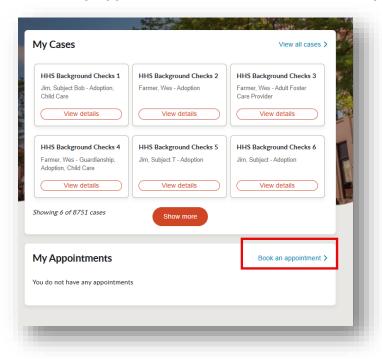
- 1. **Subjects have multiple options for completing their fingerprinting if it is required.** From the **Confirmation** page or **Next Steps** page, they can select one of the following options:
 - a. Book state appointment
 - b. Get my Fingerprint Identity Verification form
- 2. Book state appointment directs to the Appointments page (covered below)
- 3. **Get my Fingerprint Identity Verification form** directs to a knowledge article that outlines the options for scheduling an appointment or finding an alternative location



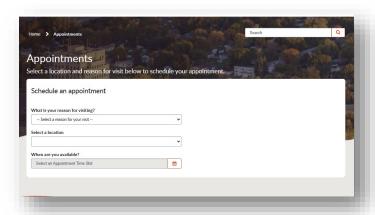
4. The content of this article is maintained by CBCU and includes a link to SFN 836, which is required if subjects choose to be fingerprinted at a law enforcement agency or other non-state provider.

Section 3: Scheduling a Fingerprinting Appointment

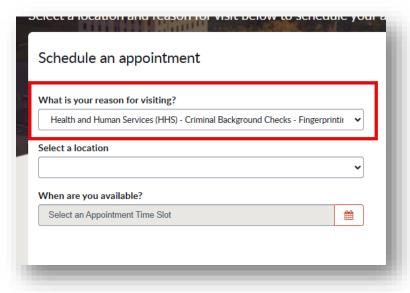
1. Subjects can go to the appointments page by clicking the link on the **Confirmation** page or **Next Steps** page as shown in the previous section. Alternatively, on the **My Dashboard** page, there is a link in the **My Appointments** section called **Book an appointment**, as shown below.



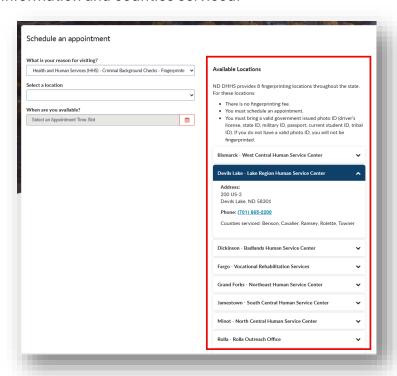
2. The **Appointments** page loads, as shown below.



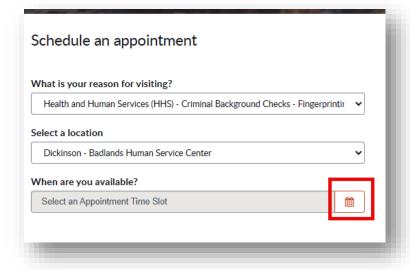
3. If coming from the **Confirmation** page or **Next Steps** page, the first field, What is your reason for visiting? Will be filled in. If it is not filled in, select the option for HHS background checks.



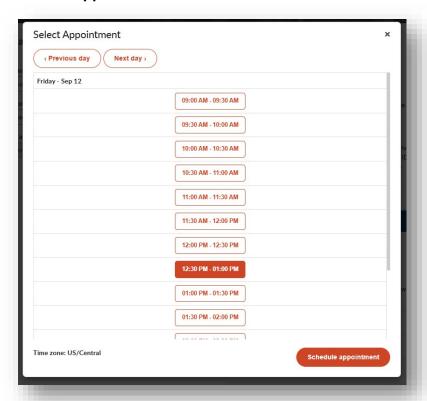
4. A list of available locations is displayed, with the ability to expand each to view contact information and counties serviced.



5. In the **Select a location** field, choose an option. Then click the calendar icon in the field below to open a modal displaying available time slots.



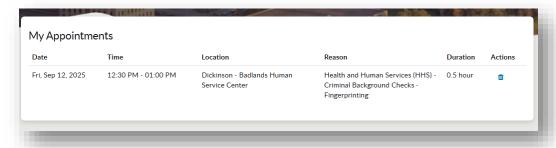
6. Use the buttons at the top to scroll to the desired day. Choose a time slot and then select **Schedule appointment**.



7. A notice is displayed at the top of the page indicating Your appointment has been booked!

Your appointment has been booked!

8. Scroll down to the bottom of the page to see your upcoming appointment details. To cancel an appointment, click on the **trash can** icon and confirm the notification that displays.



Notes: The **My Appointments** section, shown above, is also displayed on the **My Dashboard** page. Subjects cannot reschedule appointments. To select a new time or location, they must cancel their existing appointment and create a new one.

Section 4: Email Notifications related to Fingerprinting Appointments and OOS forms

The following notifications may be sent to the subject related to next steps after submitting a request:

- 1. Reminder: Your HHS Background Check Request requires fingerprints
 - a. Trigger: Sent 24 hours after submitting their request if they have not yet booked an appointment or viewed the knowledgebase article about fingerprinting options
- 2. Reminder: Your HHS Background Check Request requires additional forms
 - a. Trigger: Sent 24 hours after submitting their request if they have not yet viewed the relevant knowledgebase articles about out-of-state form requirements
- 3. Your Appointment has been scheduled
 - a. Trigger: Sent when an appointment has been successfully created
- 4. Your appointment has been cancelled
 - a. Trigger: Sent when an appointment has been successfully cancelled
- 5. Reminder: You have an appointment coming up
 - a. Trigger: Sent at 9am CST the day before a scheduled appointment

Section 5: Email Notifications related to Background Check Requests and Results

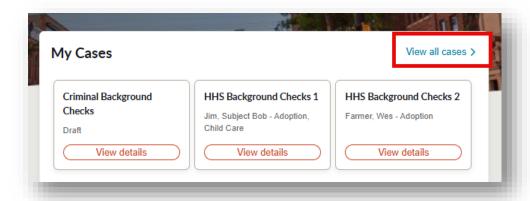
- 1. The following notifications may be sent to internal users related to background check cases:
 - a. Case BGCXXXXX work notes added Sent to the person tagged with @mention in an internal work note
 - b. Case BGCXXXXX comments added Sent to the members of the assignment group if comments are added by the subject
- 2. The following notifications may be sent to the subject of a case:
 - a. Your HHS Background Check Request has been submitted
 - b. The status of your HHS Background Check Request has been updated
 - c. Comments have been added to your Background Check Request
 - d. Your HHS Background Check Request has been completed
 - e. Your HHS Background Check Request has been closed (incomplete)
- 3. The following notifications may be sent to a requesting agency or provider contact:
 - a. Preliminary HHS Background Check Results Available
 - b. HHS Background Check Results Available
 - c. BGC request has been closed unprocessed/incomplete

Section 6: Viewing Case Information and Results

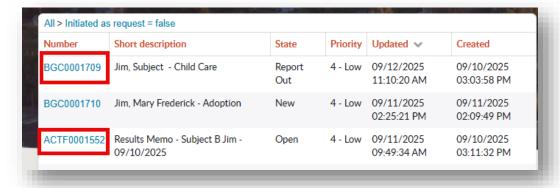
Part A: Viewing as a Subject

1. Navigate to My Dashboard and locate the My Cases section.

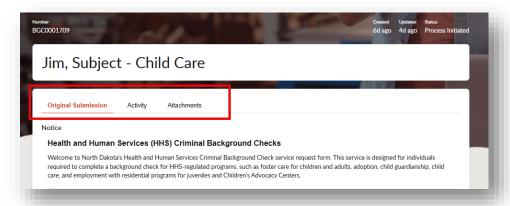
2. Click on View all cases



3. Select the case number that corresponds to the request you want to open. Background check requests start with **BGC**. Results start with **ACTF**.

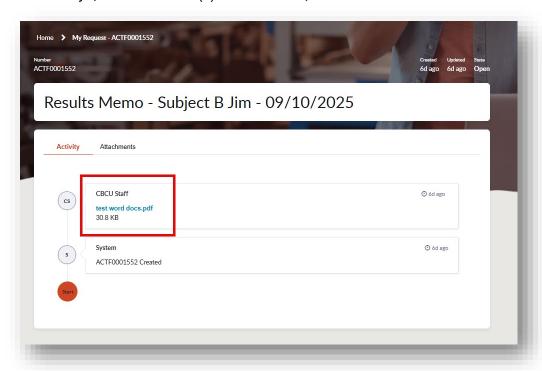


4. When clicking on a **BGC** record, the page opens an overview page. Use the section options in the middle to view original submission details, view updates, or view attachments.



5. When clicking on an **ACTF** record, the **Activity** section as well as the **Attachments** section will show the document(s) that have been shared by CBCU for review. They are available for 30 days.

After 30 days, the document(s) are removed, and the record is closed.

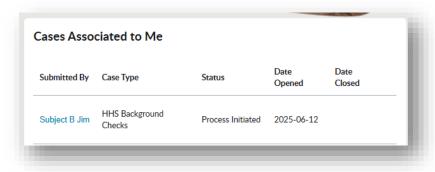


Part B: Viewing as a Child Care Provider or External Agency Contact

 Navigate to My Dashboard and locate the My Cases section and the Cases Associated to Me section. My Cases displays cases that I have submitted (unrelated to background check requests) as well as Outstanding File records, which are Background Check Results.

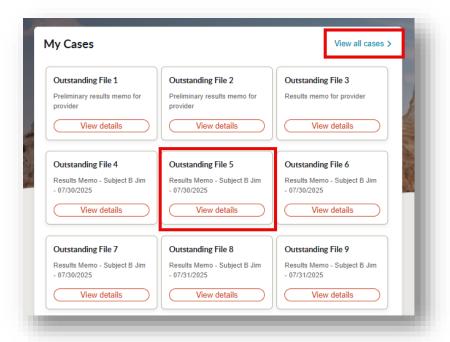
Note: The **Cases Associated to Me** shows information about background checks that others have requested that pertain to my organization.

- 2. In the **Cases Associated to Me** section, view the information to be aware of the status of these requests. The possible statuses are as follows:
 - a. Process Pending
 - b. Ready to Process
 - c. Process Initiated
 - d. Awaiting Info
 - e. In Review
 - f. Completed

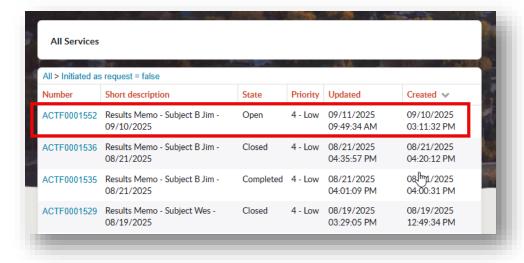


3. In the **My Cases** section, select a tile from the list for the individual you want to view results for. Alternatively, click on **View all cases**.

Note: Once a background check is completed this is where you will see the results.



4. If you click on **View all cases**, select the case number that corresponds to the request you want to open.

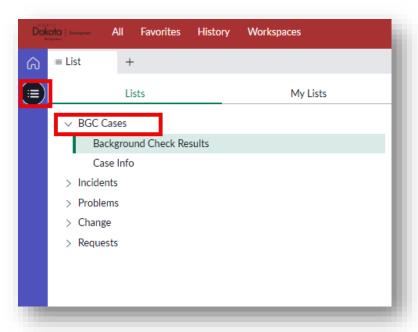


When the Results Memo page loads, the **Activity** section as well as the **Attachments** section will show the document(s) that have been shared by CBCU for review. They are available for 30 days. After 30 days, the document(s) are removed, and the record is closed.

Part C: Viewing as an Agency Contact (Internal)

Important: Before proceeding with this section, refer to Section 4 for how to login to ServiceNow and navigate to Workspace.

1. From Workspace, open the navigator list and expand **BGC Cases**.

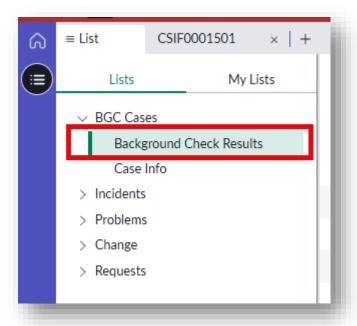


2. To view information about background checks that others have requested that pertain to my organization, click on **Case Info**. A list loads and displays relevant cases.

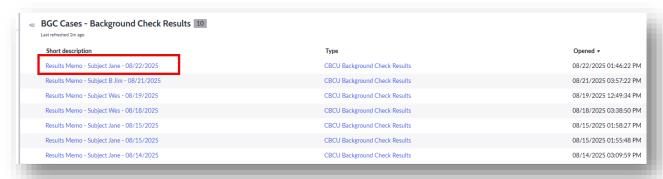


- 3. Select a record to see the same data present in a different view. The possible statuses for these records are as follows:
 - a. Process Pending
 - b. Ready to Process
 - c. Process Initiated
 - d. Awaiting Info
 - e. In Review
 - f. Completed

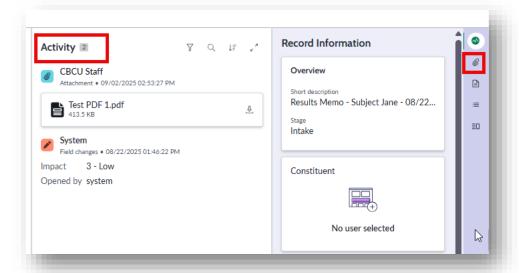
4. To view results have been shared with me, click on **Background Check Results**.



5. A list loads. Select the record you wish to view.



6. When the record opens, locate the **Activity** section as well as the **Attachments** section.



7. This record contains the document(s) that have been shared by CBCU for review. They are available for 30 days. After 30 days, the document(s) are removed, and the record is closed.

