A. New Client Registration-Set up

Direct all new clients to complete the electronic ISTC Client Information Form on www.istc.net. **If submitted by fax or email, contact the program coordinator prior to assigning a new number.**

a. Log into ATLAS and click on entities.

b. Search for the company name.

Note: If the company name has never been registered with ISTC then the following note should appear: No entities to display. **Prior to adding ANY NEW company into the database**

c. Search all components of the name.

If the name of the company appears but the address is different: DO NOT ADD, OVERWRITE, OR DELETE ANY INFORMATION IN ATLAS.

d. Call the company prior to adding the company as a new client.

e. If the company states they have never been at the address listed in ATLAS, then you may proceed to next step.

B. Adding New Clients to ATLAS

a. Go to Accounting share folder, click on New Client ID spreadsheet.

b. Choose the next available client number listed.

c. Write the number assigned as the client id number Log into ATLAS.

d. Select the entities Tab; Click Add and enter all required fields.

- Name
- Description
- Entity Type
- Country
- Phone
- Status
- Member
- Subscriber type
- Mailing address
- Billing address
- Legacy id
- Legacy password
- Primary Council

Note: This list describes the entity options:

- **Customer – Clients that use our products or services**
- **Owner- Facility**
- **Vendor -This will be handled by accounting only. Accounting has a special vendor enrollment form that must be completed. If construction vender see step h below.**
- **Council- will be either a location or Council brick or mortar facility**

e. Enter the company name.

Note: The company name has to be the d.b.a. (doing business as) name.

f. Choose a SIC code if the company has listed this number on the back of the client information form. It is not mandatory for this option to be provided. If it is not given select unknown.

g. Clients have an option to become a subscriber or not. If the client chooses to become a subscriber select yes after the payment has been processed **(see step w).**

Note: **Always provide the client with the benefits of becoming a subscriber verses a non-subscriber prior to adding them as a non-subscriber.**

h. A client must choose a subscriber type.

- **General Contractor**–A contractor who engages in more than one discipline of work.
- **Owner /other** –This is an option issued and approved by management only.
- **Specialty** -Special trade contractor may work on sub-contract from general Contractor, performing only part of the work, primarily one discipline, covered by the General contract, or they may work directly for the owner

- **Vendor** -Any person, firm, corporation engaged in any work related to the Construction industry or who furnishes material, but **<u>NO Labor</u>,** to the construction site.

Note: If the company does perform any type of labor they must choose a contractor type either General or specialty contractor. Client's statuses are changed to inactive by ACCOUNTING dept only. Never change a company status without accounting dept. approval.

i. If a company provides details of any scheduling requirements those details should be listed in the Notes section of the company profile.

j. The company address inserted into the "**mailing address**" should come from the "**Full Company Name"** section of the ISTC Client Information form.

<u>Note: NEVER insert the words "SAME AS ABOVE" into any section of a client's profile. Repeat the information provided.</u>

Click the save button at the bottom of the screen.

k. On the top of the client information form include the following:

- The employee initials
- The letter "M" if the company chose to become a member.
- The letters "NM" if the company chose to become a non-member.

<u>If the client chooses to become a Member:</u>

l. Follow the Customer Service Cash Receipts Reporting procedures to process the subscriber payment.

m. After membership is paid the employee must complete the bottom section of the client information form.

- Verified Primus and ATLAS – Write your initials and the date the company was added to ATLAS.
- Verified Solomon –Initialed by ACCOUNTING dept.
- Paid Date: **Will include the date the membership was paid, the form of payment received, amount, and the receipt number. Include if the payment received was either a pro-rated member or full year membership followed by the subscriber type(S, G, V, BCG, O,) and the initials of the employee.**

n. Change the member status to members in ATLAS.

- Log into ATLAS
- Select entities.
- Enter the legacy id number and click Search. Click on the entities name and click edit Change member drop to yes.

Go down to Access Information mark yes in the history access and background access click save.

o. Call or email the company and provide the new client Id number. **See sample email below**:

We have received your client information forms and have completed the set up process. Please see below for your login credentials. Your account information is as follows:

Legacy ID#

Username

Password:

We suggest you use Google Chrome, Mozilla Firefox or Safari as your browser for use with ATLAS. I have attached tutorials on how to schedule training; order backgrounds order drug screens and add users to this email for your convenience. If questions arise please contact the Customer Service Department.