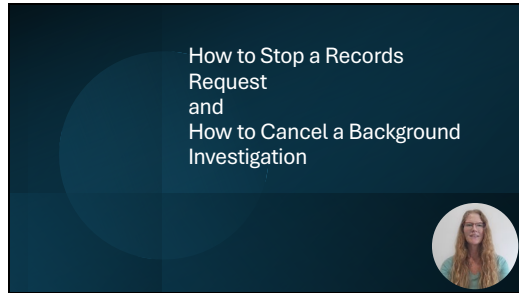
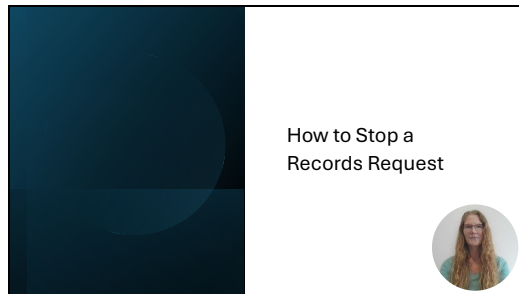


Slide 1



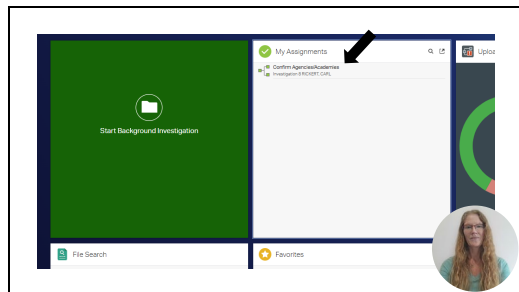
Hi I'm Kamille, your TCOLE records manager. This video will explain How to Stop a Records Request and How to Cancel a Background Investigation

Slide 2



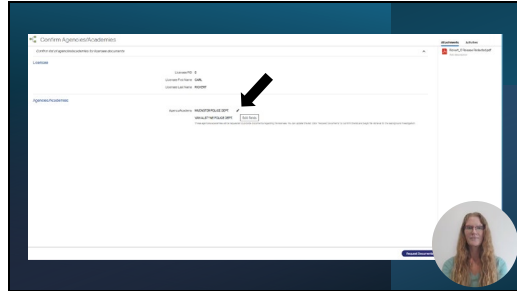
First let's look at how to stop a records request. Let's say you've started a background investigation on an applicant. You already attached an Authority to Release Information form signed by your applicant.

Slide 3



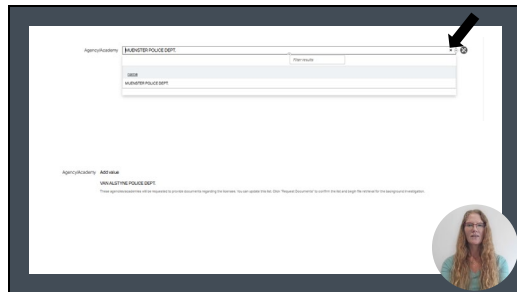
Now your My Assignments tile is prompting you to confirm the agencies you want to request records from. Select Confirm Agencies/Academies.

Slide 4



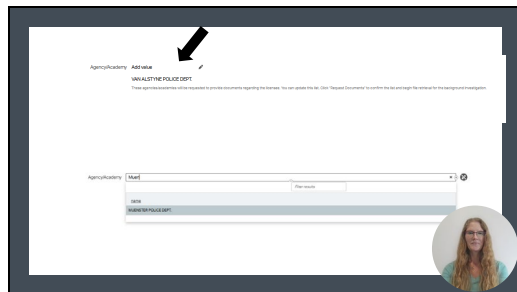
When you hover your mouse over the name of the agency you no longer want records from. A small grey pencil appears. Select the pencil.

Slide 5



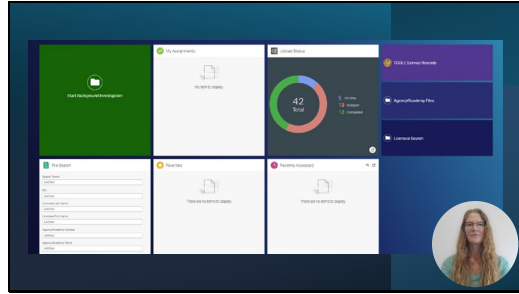
See that X on the right? Select it and watch the agency disappear from your list of agencies. Did you delete the wrong one and want to add it back? Or you want to add a different agency?

Slide 6



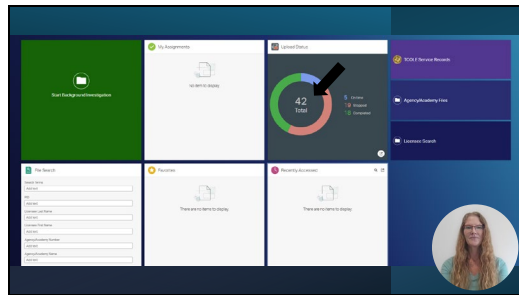
Just hover your mouse over Add Value and watch the pencil appear again. Select the pencil and start typing the name of the agency you want to add. When it appears below, select it. That's how you can stop a records request BEFORE you request documents.

Slide 7



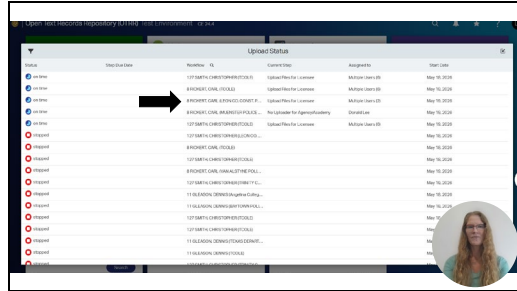
But what if you want to stop a request after you've requested the document? Let's say you've started a background investigation on an applicant. You already attached an Authority to Release Information form signed by your applicant and sent out records requests to all the agencies where the applicant has held appointments. You even added an agency or two where your applicant previously applied but was not hired. But then, you realize that, for whatever reason, you want to stop a request for records that you sent to one or more of those agencies. You can do that!

Slide 8



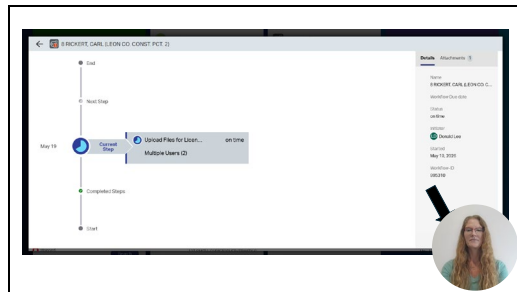
To STOP a records request for a specific agency after the request is already sent, go to the Upload Status tile on your OTRR homepage. When you select the number inside the circle, you can see a list of all the records request tasks in your background investigations. If you click elsewhere in this tile, OTRR won't respond.

Slide 9



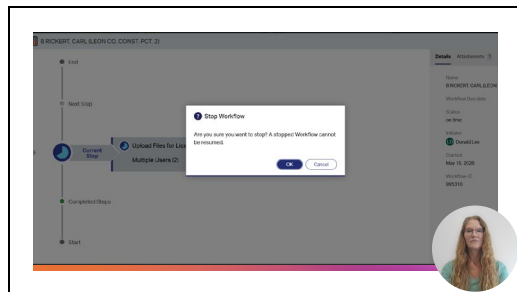
A window called Upload Status will appear. This tells you the status of all your upload requests. OTRR calls these individual records requests Workflows. Find the workflow that you want to stop, and click on it.

Slide 10



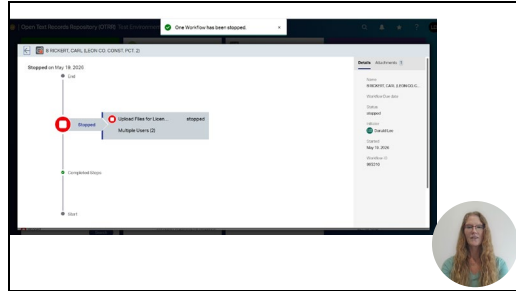
Select the Stop button in the bottom right corner.

Slide 11



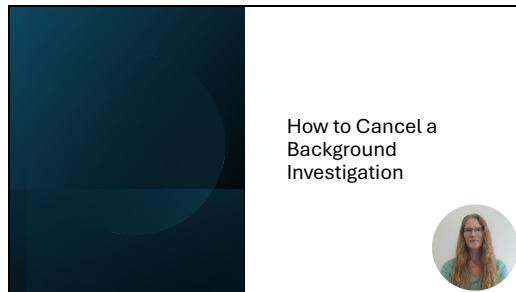
Before it stops the task, a pop-up window will confirm that you want to stop. Select OK.

Slide 12



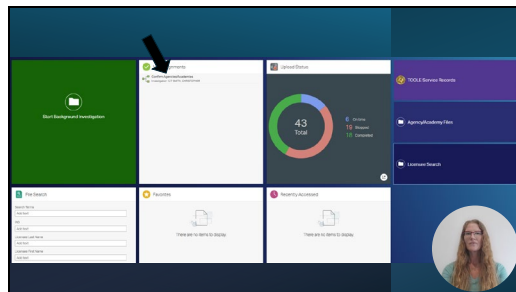
You'll know you've stopped that records request because a message will appear at the top that reads One Workflow has been stopped. Also, the timeline on the left will show that you've stopped the task. And that's it. That's how you stop a records request.

Slide 13



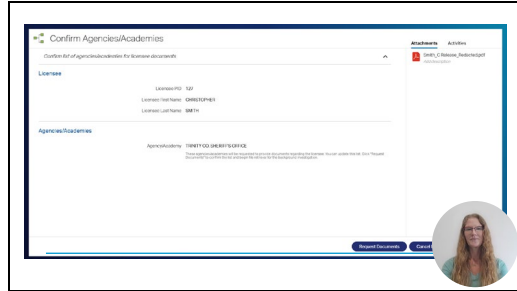
Next we'll look at how to cancel a background investigation. What if you've started an investigation, and you learn something that disqualifies your applicant? It's time to cancel the investigation.

Slide 14



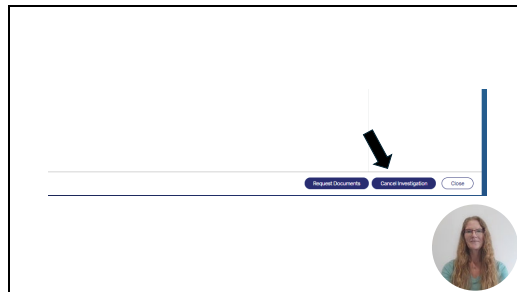
If it's before you've confirmed the agencies you want to request records from, you cancel the investigation from the confirmation screen. First select the prompt in your My Assignments tile that says Confirm Agencies/Academies.

Slide 15



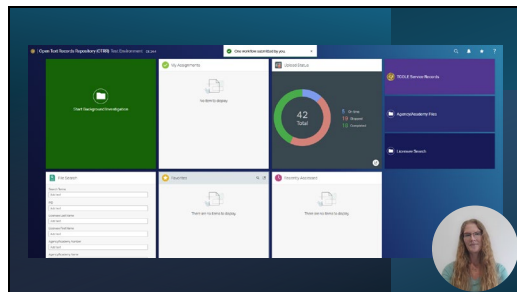
This will take you to the Confirm Agencies/Academies screen. Normally you are on this screen to request files, but on this occasion, you want to stop everything.

Slide 16



In the bottom right corner of that page, select Cancel Investigation

Slide 17



The workflows associated with that background investigation have now disappeared from your My Assignments tile.

Slide 18



Problems? Contact the TCOLE Support team.
512 936 7700
support@tcole.texas.gov



That's how you stop a records request and cancel a background investigation. If none of these steps address your issue, it may be time to reach out to your TCOLE support team. You can email support@tcole.texas.gov or call **512-936-7700**