



Launching a Background Investigation



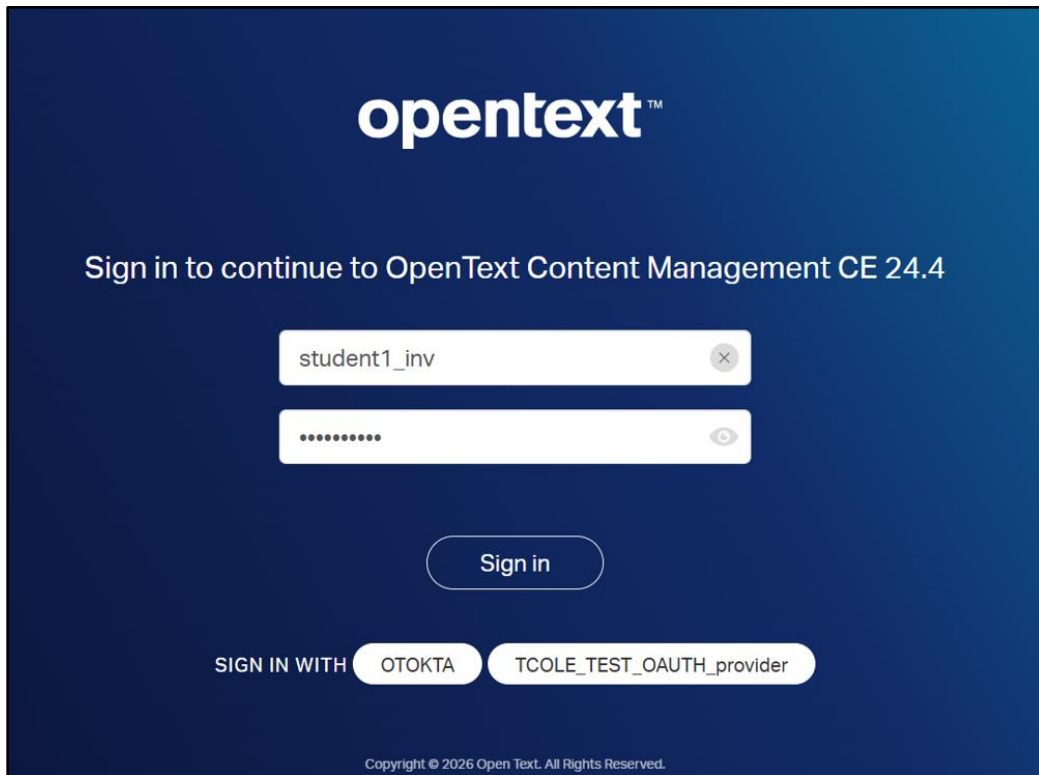
Who Should Use this Guide

Investigators

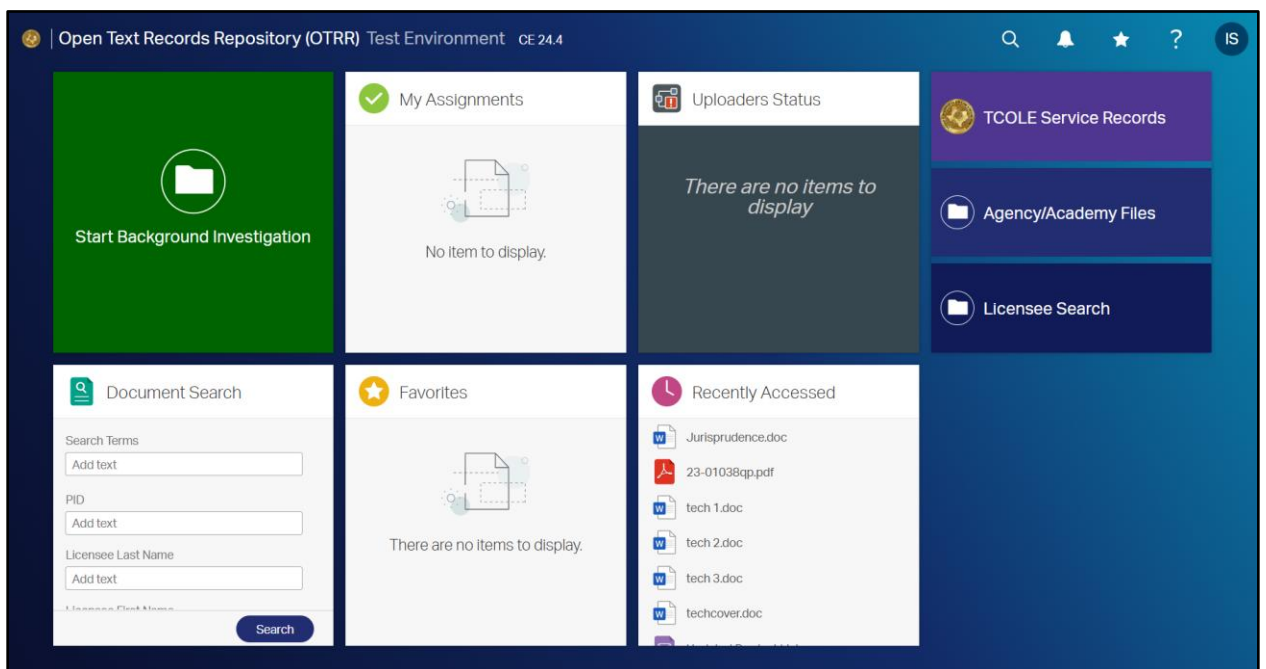
Recruiters

Launching a Background Investigation

1. Log in to OTRR.



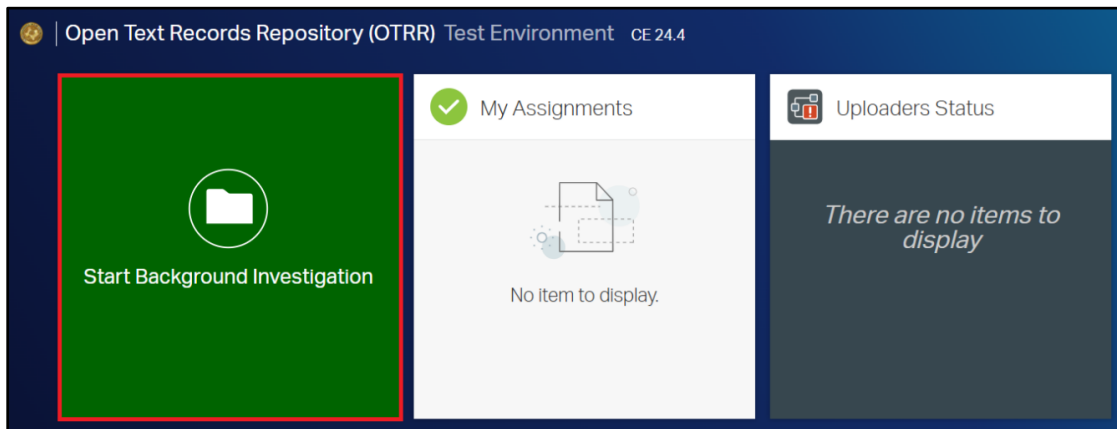
Your Home Page appears with tiles based on your role.



As an investigator/recruiter, you can use these tiles:

- **My Assignments** – view tasks assigned to you (e.g., Upload Release Form, Confirm Agencies/Academies, Review Documents)
- **Start Background Investigation** - start a new background investigation for a licensee
- **Uploaders Status** – track document upload progress from agencies/academies and TCOLE
- **TCOLE Service Records** and **Agency/Academy Files** – review documents submitted for active investigations

2. Click **Start Background Investigation**.



3. Search for the licensee and select the matching result.

Start Background Investigation

Attachments

Drag and drop files here

Licensee Release Form: Starting Background Investigation

To start an investigation process a Release Form from the licensee needs to be attached. You can drag and drop the file from your desktop to here.

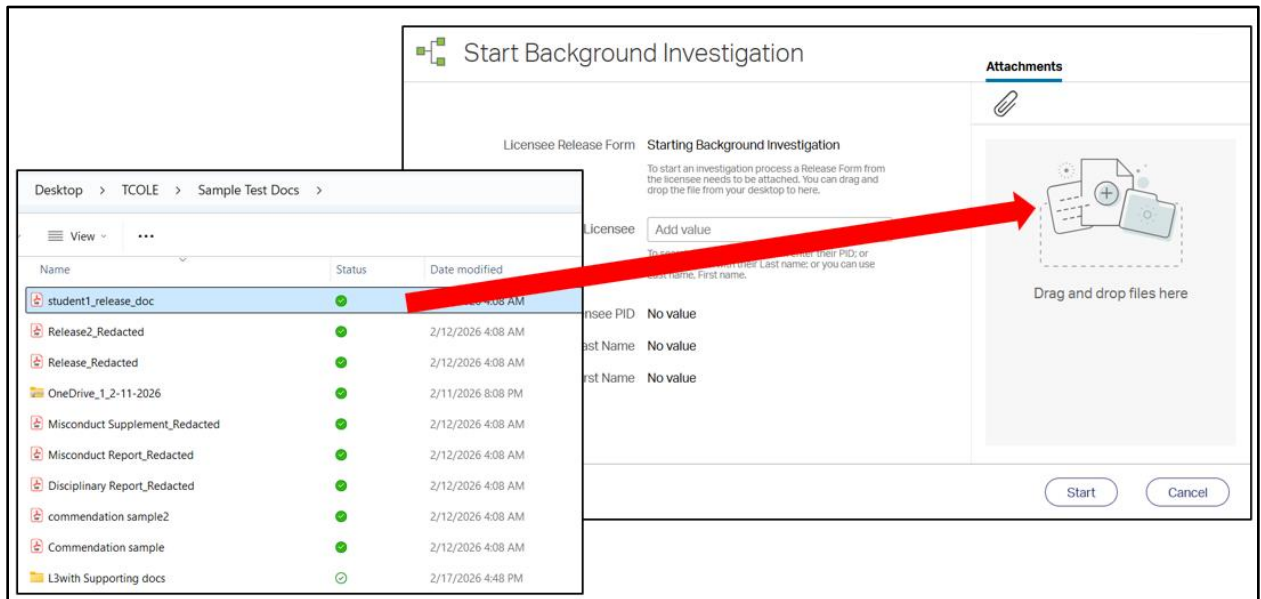
*Search for Licensee

Filter results

Licensee PID	PID	Last Name	First Name
	11	GLEASON	DENNIS
Licensee Last Name	7135	GLEASON	WILLIAM
Licensee First Name	36347	GLEASON	MICHAEL

4. Attach the release form for the licensee:

- Drag and drop the file, or
- Browse your computer to upload the file



⚠ If you do not attach the release form now, an **Upload Release Form** task will be assigned to you (see the last section of this guide).

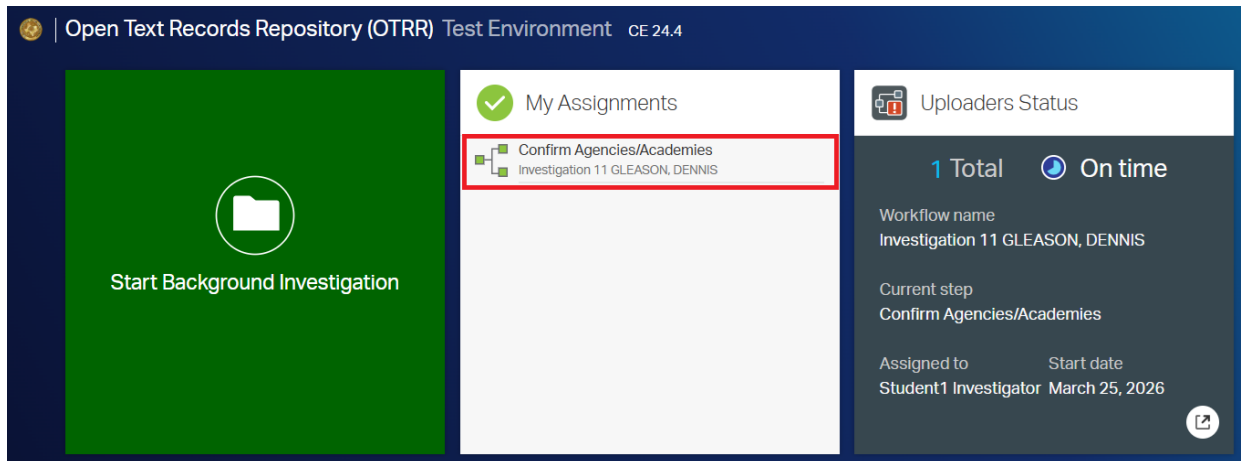
5. Click **Start**.

The screenshot shows the 'Start Background Investigation' form. The 'Licensee Release Form' is 'Starting Background Investigation'. The 'Search for Licensee' field contains '11'. The 'Licensee PID' is '11', 'Licensee Last Name' is 'GLEASON', and 'Licensee First Name' is 'DENNIS'. The 'Attachments' section shows the file 'student1_release_doc.pdf' with an 'Add description' field. The 'Start' button is highlighted with a red box.

A new **Confirm Agencies/Academies** task is added to your **My Assignments** tile.

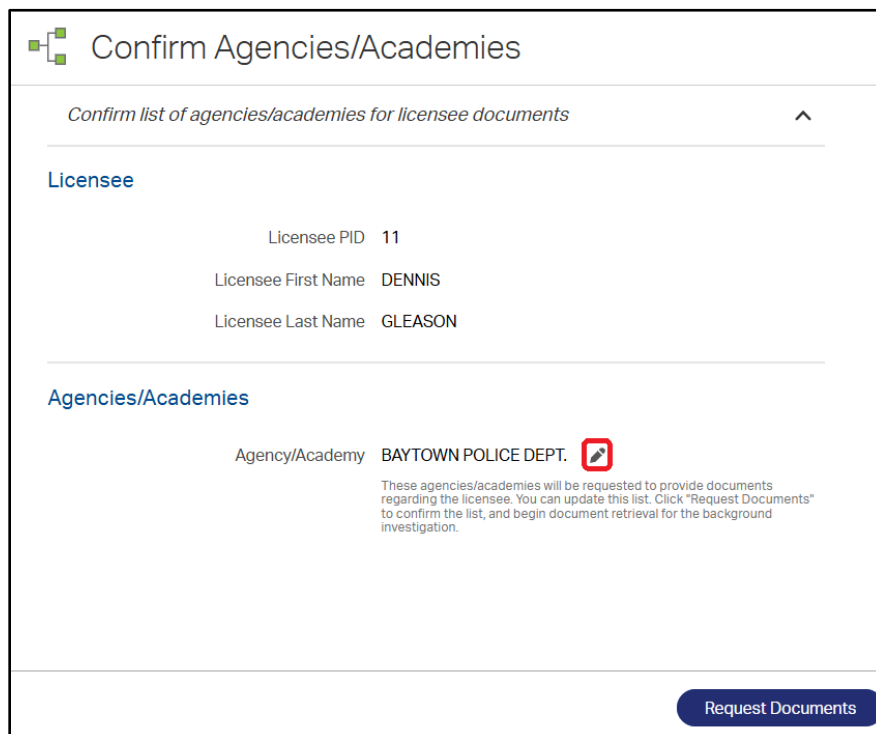
 You will also receive an email notification.

6. Open the **Confirm Agencies/Academies** task.



OTRR automatically lists all current and former agencies/academies associated with the licensee.

7. Review the list and add missing agencies/academies if needed.



Confirm Agencies/Academies

Confirm list of agencies/academies for licensee documents

Licensee

Licensee PID 11

Licensee First Name DENNIS

Licensee Last Name GLEASON

Agencies/Academies

Agency/Academy ✕ ✕

These agencies/academies will be requested to provide documents regarding the licensee. You can update this list. Click "Request Documents" to confirm the list, and begin document retrieval for the background investigation.

[Request Documents](#)

Confirm Agencies/Academies

Confirm list of agencies/academies for licensee documents

Licensee

Licensee PID 11

Licensee First Name

Licensee Last Name

Agencies/Academies

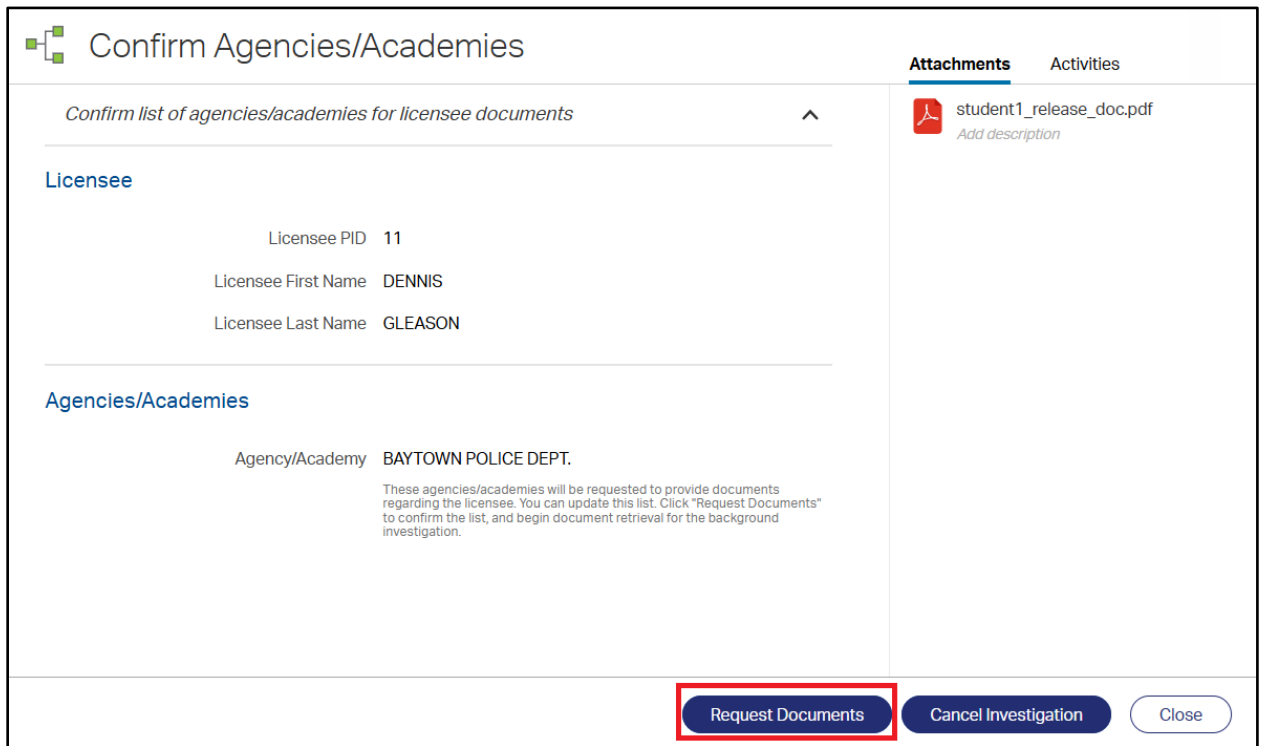
Agency/Academy ✕ ✕

+ ✕ ✕

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[Request Documents](#)

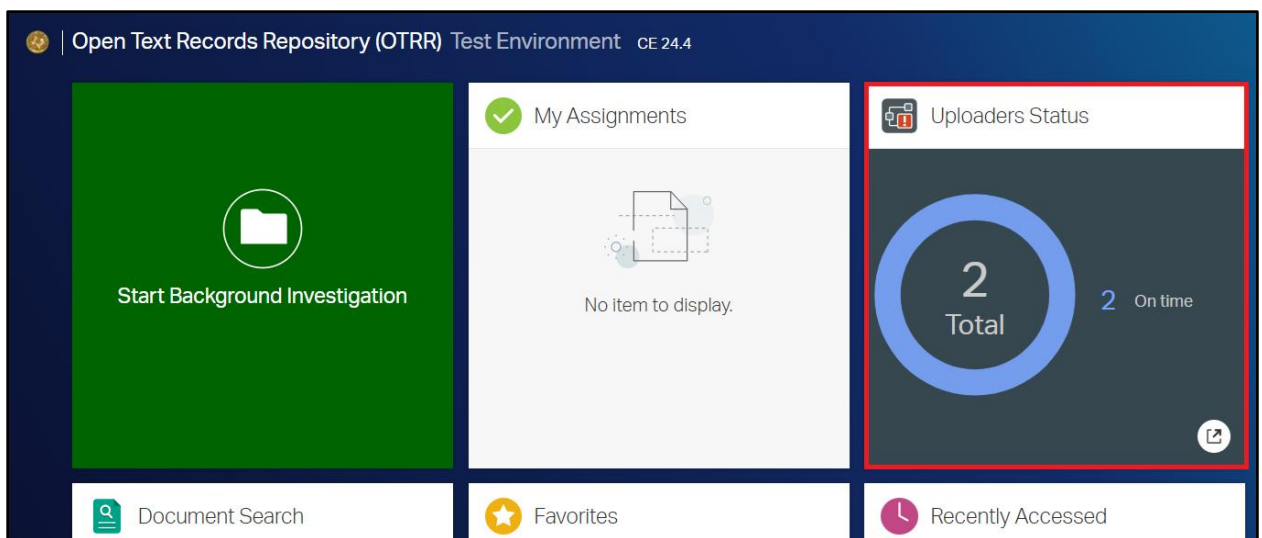
8. Click **Request Documents** when finished.






Upload tasks are sent to the uploaders for each listed agency/academy. TCOLE always receives a separate upload task for each investigation.

🔔 Email notifications are sent to all uploaders.

The **Uploaders Status** tile will now show the upload tasks assigned to the uploaders:



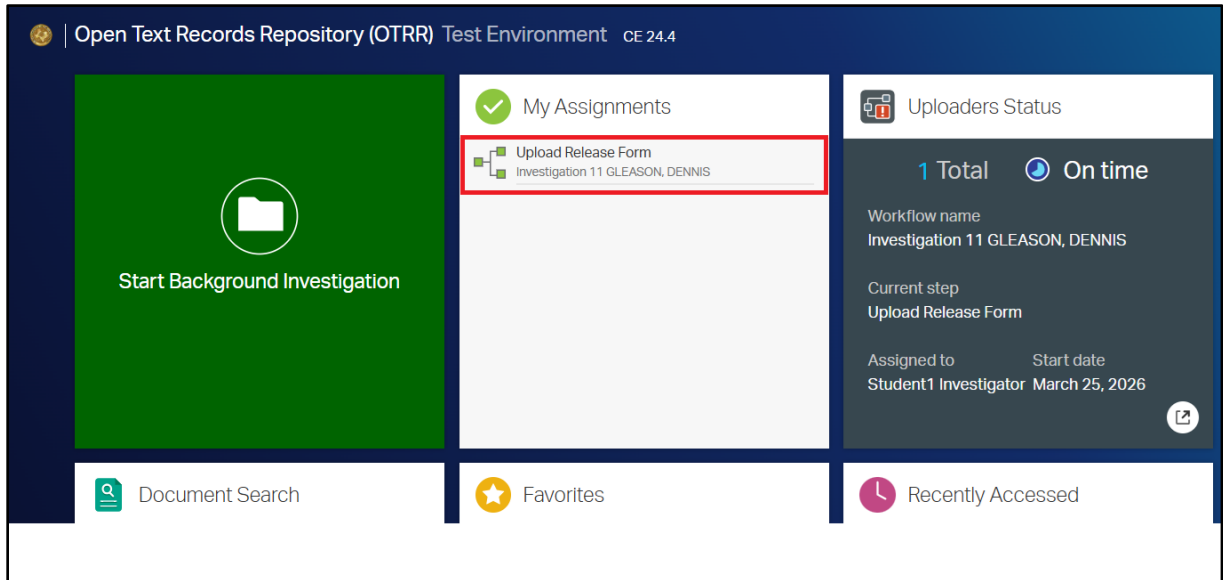
9. Click on the number or tile title to see detailed upload status.

Uploaders Status 						
Status	Step Due Date	Workflow	Q	Current Step	Assigned to	Start Date
 on time		11 GLEASON, DENNIS (BAYTO...		Upload Documents for Licensee	Student1 Uploader	March 25, 2026
 on time		11 GLEASON, DENNIS (TCOLE)		Upload Documents for Licensee	Multiple Users (19)	March 25, 2026

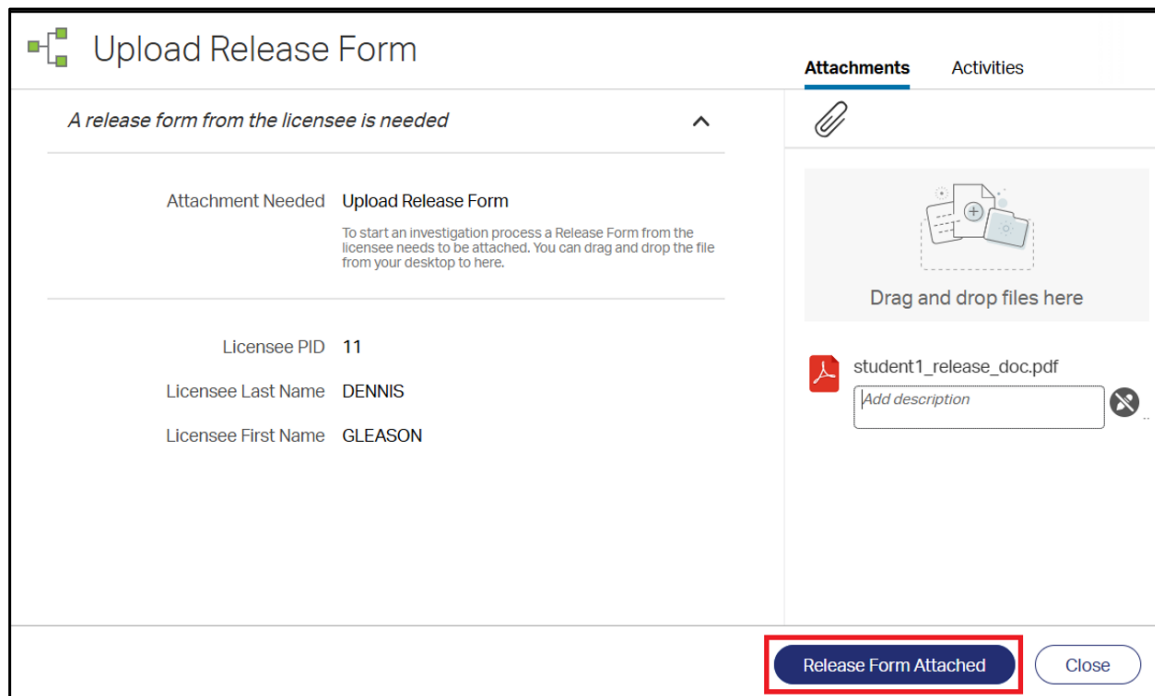
10. Click **Close** to return to the Home Page.

Upload Release Form Task (only if skipped earlier)

If you did not attach the release form earlier, an **Upload Release Form** task will appear under the **My Assignments** tile.



Upload the release form (drag-and-drop or browse), and click **Release Form Attached** to complete the task:



The background investigation is started, and document requests are sent to all required agencies/academies and TCOLE.