



There are 2 options for mass uploads that we offer. Please note that the capability to submit mass uploads may need to be activated on your account. You may contact your Client Care Partner for more information.

The screenshot shows the Orange Tree web application interface. On the left, there is a navigation menu with the following items: 'Place an Order' (with sub-items: 'Applicant Order', 'Applicant Entry', 'Import Applicants', and 'Import Applicant Entries'), 'Orders' (with sub-items: 'In Progress' (1), 'Completed (May.)' (0), 'Paused' (0), 'Applicant Auth.' (0), and 'Pending Interview' (0)), and 'Care Center' (with sub-items: 'Teresa Kammuller' (952-358-7141, TKammuller@otes.com), 'Messages' (0), and 'Manage Account'). The main content area is titled 'Most Recent Orders' and includes a search bar with 'Tests*' and a 'Go' button, along with buttons for 'Show Search Options', 'Save as Default', and 'Delete this Search'. Below the search bar, there is a section for 'Applications' displaying 'Displaying 1 - 1 of 1 orders.' and a single order entry: 'Test, Candidate, A' with an 'Open' button. The top right of the page has navigation links for 'HOME', 'SEARCH', 'FORMS', and 'LOGOUT', and a 'Client connect' logo.



If you have already collected the signed authorization from your candidates or employees and have all their information on hand, click **Import Applicants**

The screenshot displays the Orange Tree web application interface. At the top right, there are navigation links: HOME, SEARCH, FORMS, and LOGOUT. The main header area includes the Orange Tree logo and the text 'Client connect'. Below the header, there is a 'Most Recent Orders' section with a search bar containing 'Tests*' and a 'Go' button. Below the search bar are three buttons: 'Show Search Options', 'Save as Default', and 'Delete this Search'. On the left side, there is a navigation menu with the following items: 'Place an Order' (with sub-items: Applicant Order, Applicant Entry, **Import Applicants**, and Import Applicant Entries), 'Orders' (with sub-items: In Progress (1), Completed (May.) (0), Paused (0), Applicant Auth. (0), and Pending Interview (0)), and 'Care Center' (with sub-items: Teresa Kammuller (952-358-7141, TKammuller@otes.com), Messages (0), and Manage Account).



Select a location

HOME SEARCH FORMS LOGOUT

Place an Order
Applicant Order
Applicant Entry
Import Applicants
Import Applicant Entries

Orders
In Progress 1
Completed (May.) 0
Paused 0
Applicant Auth. 0
Pending Interview 0

Care Center
Teresa Kammuller
952-358-7141
TKammuller@otes.com
Messages 0
Manage Account

Import Applicants

Location Client connect

Location: Corporate *
Order For: Please select a location *
Service Package: Please select a location *

Location dropdown options:
Corporate (checked)
New York
San Diego
Work Location

The following Microsoft Office Excel file has been generated for "No Package Selected"

[Download Template](#)

Please use this template to fill out applicant information and submit it back in to our system by clicking the Choose a File button below.

Upload
Choose File | No file chosen *

[Cancel](#) [Submit](#)



Select a service package

The screenshot shows the 'ClientConnect' web application interface. The main navigation bar includes 'HOME', 'SEARCH', 'FORMS', and 'LOGOUT'. The left sidebar contains sections for 'Place an Order' (with sub-links: Applicant Order, Applicant Entry, Import Applicants, Import Applicant Entries), 'Orders' (with sub-links: In Progress (1), Completed (May.) (0), Paused (0), Applicant Auth. (0), Pending Interview (0)), and 'Care Center' (with contact info for Teresa Kammuller and links for Messages (0) and Manage Account).

The main content area is titled 'Import Applicants' and is divided into two sections:

- Location:** A form with 'Location' set to 'Corporate' and 'Order For' set to 'Mallory'.
- Upload Template:** A section with a note: 'Columns marked in orange are required fields. The following Microsoft Office Excel file has been generated for "Driving Only"'. It includes a 'Download Template' button and an 'Upload' section with a 'Choose File' button and the text 'No file chosen'.

A dropdown menu for 'Service Package' is open, showing a list of options. The 'Driving Only' option is selected and highlighted with a blue bar and an orange border. Other options include: 'Please select a service package', 'Background + Health Services', 'Criminal Only', 'DGT Test', 'Drug Test - 10 panel', 'Drug Test - 5 Panel (Quest)', 'Drug Test - 5 Panel (eScreen)', 'GDS Only', 'Live Demo', 'References Only', 'Standard Package', 'Standard Package with Driving', 'Standard Package with Verifications', 'Statewide Only', 'Test stage 1', 'Test stage 2', and 'Titer - MMR'.

The bottom of the page features a green bar with the text 'Contact Us | 1-800-886-4777'.



Click **Download Template**. Based on the package you selected, the template will require different pieces of information be provided on the spreadsheet.

The screenshot shows the 'Client Connect' web application interface. The top navigation bar includes 'HOME', 'SEARCH', 'FORMS', and 'LOGOUT'. The left sidebar contains a 'Place an Order' menu with 'Import Applicants' highlighted, and an 'Orders' section with counts for 'In Progress' (1), 'Completed (May.)' (0), 'Paused' (0), 'Applicant Auth.' (0), and 'Pending Interview' (0). Below that is a 'Care Center' section with contact information for Teresa Kammuller.

The main content area is divided into two sections:

- Import Applicants:** A form with three dropdown menus: 'Location' (Corporate), 'Order For' (Mallory), and 'Service Package' (Driving Only). Each dropdown has an asterisk icon indicating a required field.
- Upload Template:** A section with a 'Download Template' button highlighted in orange. Below it, there is an 'Upload' section with a 'Choose File' button and the text 'No file chosen'. A 'Submit' button is located at the bottom right of this section.

The footer of the page contains the text 'Contact Us | 1-800-886-4777'.



Save the template spreadsheet once completed. Click **Upload** and select the file from the place you saved it.

The screenshot displays the 'Import Applicants' section of the Client Connect web application. The interface includes a top navigation bar with 'HOME', 'SEARCH', 'FORMS', and 'LOGOUT'. On the left, there is a sidebar with 'Place an Order' (containing 'Applicant Order', 'Applicant Entry', 'Import Applicants', and 'Import Applicant Entries') and 'Orders' (containing 'In Progress', 'Completed (May.)', 'Paused', 'Applicant Auth.', and 'Pending Interview'). Below the sidebar is the 'Care Center' contact information for Teresa KammueLLer. The main content area is titled 'Import Applicants' and features a 'Location' section with dropdown menus for 'Location' (set to 'Corporate'), 'Order For' (set to 'Mallory'), and 'Service Package' (set to 'Driving Only'). Below this is an 'Upload Template' section with a 'Download Template' button and an 'Upload' section containing a 'Choose File' button (highlighted with an orange border) and a 'Cancel' button. A 'Submit' button is located at the bottom right of the main content area. The footer contains the text 'Contact Us | 1-800-886-4777'.



Click **Submit**. You will receive a confirmation email when all orders on the upload have been created. Candidates will receive a welcome email to follow along with the progress.

The screenshot shows the 'Import Applicants' page in the Client Connect system. The page has a top navigation bar with 'HOME', 'SEARCH', 'FORMS', and 'LOGOUT'. On the left, there is a sidebar with 'Place an Order' (containing 'Applicant Order', 'Applicant Entry', 'Import Applicants', and 'Import Applicant Entries') and 'Orders' (with counts for 'In Progress', 'Completed (May.)', 'Paused', 'Applicant Auth.', and 'Pending Interview'). Below the sidebar is the 'Care Center' contact information for Teresa Kammuller. The main content area is titled 'Import Applicants' and features a 'Location' section with dropdown menus for 'Location' (Corporate), 'Order For' (Mallory), and 'Service Package' (Driving Only). Below this is an 'Upload Template' section with a note about required fields, a 'Download Template' button, and an 'Upload' section with a 'Choose File' button. A 'Cancel' button is on the left and a 'Submit' button is on the right of the main content area.



If you need Orange Tree to collect information about your candidates or employees, including a signed authorization form, click **Important Applicant Entries**

The screenshot shows the 'Import Applicant Entries' page in the Orange Tree system. The page has a top navigation bar with 'HOME', 'SEARCH', 'FORMS', and 'LOGOUT'. On the left, there is a sidebar with 'Place an Order' (containing 'Applicant Order', 'Applicant Entry', 'Import Applicants', and 'Import Applicant Entries' which is highlighted) and 'Orders' (with counts for 'In Progress', 'Completed (May.)', 'Paused', 'Applicant Auth.', and 'Pending Interview'). Below that is the 'Care Center' section with contact information for Teresa KammueLLer. The main content area is titled 'Import Applicant Entries' and includes a 'Client connect' logo. It features three dropdown menus for 'Location', 'Order For', and 'Service Package', each with a red asterisk indicating a required field. Below these is an 'Upload Template' section with a 'Note' about required fields and a 'Download Template' button. An 'Upload' section contains a 'Choose File' button and the text 'No file chosen' with a red asterisk. At the bottom, there is an 'OPTIONAL - Additional Information Requested' section with checkboxes for 'Education', 'Employment', 'Reference', 'Professional License', and 'Driving License'. 'Cancel' and 'Submit' buttons are located at the bottom of the form. A green footer bar contains the text 'Contact Us | 1-800-886-4777'.



Select a location

HOME SEARCH FORMS LOGOUT

Place an Order

- Applicant Order
- Applicant Entry
- Import Applicants
- Import Applicant Entries**

Orders

- In Progress **1**
- Completed (May.) **0**
- Paused **0**
- Applicant Auth. **0**
- Pending Interview **0**

Care Center

Teresa Kammuller
952-358-7141
TKammuller@otes.com

Messages **0**

Manage Account

Import Applicant Entries

Location Client connect

Location: Corporate *
Order For: Please select a location *
Service Package: Please select a location *

Corporate *
New York
San Diego
Work Location

- First, Middle and Last Names **must not** contain the following characters: \ : ? / .
- Email Address **must** be provided in the following format: fake@email.com
- Tracking Number, **if provided**, must be 255 characters or less.
- Cost Center, **if provided**, must be 25 characters or less.

The following Microsoft Office Excel file template will help you get started:

[Download Template](#)

Please use this template to fill out applicant information and submit it back in to our system by clicking the Choose a File button below.

Upload
[Choose File](#) No file chosen *

OPTIONAL - Additional Information Requested Client connect

You may request additional information from the applicant here:

- Education
- Employment
- Reference
- Professional License
- Driving License

[Cancel](#) [Submit](#)

Contact Us | 1-800-886-4777



Select a Service Package

HOME SEARCH FORMS LOGOUT

Place an Order

- Applicant Order
- Applicant Entry
- Import Applicants
- Import Applicant Entries**

Orders

- In Progress **1**
- Completed (May.) **0**
- Paused **0**
- Applicant Auth. **0**
- Pending Interview **0**

Care Center

- Teresa KammueLLer
952-358-7141
TKammueLLer@otes.com
- Messages **0**
- Manage Account

Import Applicant Entries

Location

Location: Corporate *
Order For: Mallory *
Service Package: Driving Only *

Upload Template

Note: Columns marked in orange are required fields

- First, Middle and Last Names **must not** contain the following characters: \ : ? / .
- Email Address **must** be provided in the following format: fake@email.com
- Tracking Number, **if provided**, must be 255 characters or less.
- Cost Center, **if provided**, must be 25 characters or less.

The following Microsoft Office Excel file template will help you get started:

[Download Template](#)

Please use this template to fill out applicant information and submit it back in to our system by clicking the Choose a File button below.

Upload
 No file chosen *

OPTIONAL - Additional Information Requested

You may request additional information from the applicant here:

- Education
- Employment
- Reference
- Professional License
- Driving License

Service Package Dropdown:

- Please select a service package
- Background + Health Services
- Criminal Only
- DOT Test
- Driving Only**
- Drug Test - 10 panel
- Drug Test - 5 Panel (Quest)
- Drug Test - 5 Panel (eScreen)
- GDS Only
- Live Demo
- References Only
- Standard Package
- Standard Package with Driving
- Standard Package with Verifications
- Statewide Only
- Test stage 1
- Test stage 2
- Titler - MMR

Contact Us | 1-800-886-4777

Click **Download Template**. Since Orange Tree will be contacting the candidate/employee for their information, you are only required to provide to us their name, email address, and mobile phone (optional).

The screenshot shows the 'Import Applicant Entries' page in the Client Connect system. The page includes a navigation menu on the left with options like 'Place an Order', 'Orders', and 'Care Center'. The main content area is divided into three sections: 'Location', 'Upload Template', and 'OPTIONAL - Additional Information Requested'. The 'Location' section has dropdown menus for 'Location' (Corporate), 'Order For' (Mallory), and 'Service Package' (Driving Only). The 'Upload Template' section contains a 'Download Template' button, a note about required fields, and an 'Upload' section with a 'Choose File' button. The 'OPTIONAL' section has checkboxes for 'Education', 'Employment', 'Reference', 'Professional License', and 'Driving License'. At the bottom, there are 'Cancel' and 'Submit' buttons.

Place an Order

- Applicant Order
- Applicant Entry
- Import Applicants
- Import Applicant Entries**

Orders

- In Progress **1**
- Completed (May.) **0**
- Paused **0**
- Applicant Auth. **0**
- Pending Interview **0**

Care Center

Teresa KammueLLer
952-358-7141
TKammueLLer@otes.com

Messages **0**

Manage Account

Import Applicant Entries

Location

Location: Corporate *
Order For: Mallory *
Service Package: Driving Only *

Upload Template

Note: Columns marked in orange are required fields

- First, Middle and Last Names **must not** contain the following characters: \ : ? / .
- Email Address **must** be provided in the following format: fake@email.com
- Tracking Number, **if provided**, must be 255 characters or less.
- Cost Center, **if provided**, must be 25 characters or less.

The following Microsoft Office Excel file template will help you get started:

Download Template

Please use this template to fill out applicant information and submit it back in to our system by clicking the Choose a File button below.

Upload

Choose File No file chosen *

OPTIONAL - Additional Information Requested

You may request additional information from the applicant here:

- Education
- Employment
- Reference
- Professional License
- Driving License

Cancel Submit

Contact Us | 1-800-886-4777

Save the template spreadsheet once completed. Click **Upload** and select the file from the place you saved it.

The screenshot shows the 'Import Applicant Entries' page in the Client Connect system. The page is divided into several sections:

- Navigation:** Includes links for HOME, SEARCH, FORMS, and LOGOUT in the top right.
- Place an Order:** A sidebar menu with options: Applicant Order, Applicant Entry, Import Applicants, and Import Applicant Entries (highlighted).
- Orders:** A sidebar menu with status counts: In Progress (1), Completed (May.) (0), Paused (0), Applicant Auth. (0), and Pending Interview (0).
- Care Center:** Contact information for Teresa KammueLLer (952-358-7141, TKammueLLer@otes.com) and links for Messages (0) and Manage Account.
- Import Applicant Entries Form:**
 - Location:** Three dropdown menus for 'Location' (Corporate), 'Order For' (Mallory), and 'Service Package' (Driving Only). Each dropdown has an asterisk icon indicating a required field.
 - Upload Template:** A section with a 'Note' about required fields (marked in orange in the original image) and a list of restrictions: First, Middle, and Last Names must not contain backslash, colon, or forward slash; Email Address must be in the format fake@email.com; Tracking Number, if provided, must be 255 characters or less; Cost Center, if provided, must be 25 characters or less. Below the note is a 'Download Template' button and a paragraph explaining the template's use. An 'Upload' section contains a 'Choose File' button (highlighted with an orange border) and the text 'No file chosen' with an asterisk icon.
 - OPTIONAL - Additional Information Requested:** A section with a heading and a list of checkboxes: Education, Employment, Reference, Professional License, and Driving License (checked).
 - Buttons:** 'Cancel' and 'Submit' buttons are located at the bottom of the form.

You may optionally request that Orange Tree obtain additional information from the candidate to pass along to you, but not verify.

The screenshot shows the 'Import Applicant Entries' page in the Orange Tree system. The page includes a navigation menu on the left with options like 'Place an Order', 'Orders', and 'Care Center'. The main content area is divided into three sections: 'Location', 'Upload Template', and 'OPTIONAL - Additional Information Requested'. The 'Location' section has dropdown menus for 'Location' (Corporate), 'Order For' (Mallory), and 'Service Package' (Driving Only). The 'Upload Template' section provides instructions and a 'Download Template' button. The 'OPTIONAL - Additional Information Requested' section has checkboxes for 'Education', 'Employment', 'Reference', 'Professional License', and 'Driving License' (which is checked). Buttons for 'Cancel' and 'Submit' are at the bottom.

Place an Order

- Applicant Order
- Applicant Entry
- Import Applicants
- Import Applicant Entries**

Orders

- In Progress **1**
- Completed (May.) **0**
- Paused **0**
- Applicant Auth. **0**
- Pending Interview **0**

Care Center

Teresa KammueLLer
952-358-7141
TKammueLLer@otes.com

Messages **0**

Manage Account

Import Applicant Entries

Location Client connect

Location: Corporate *
Order For: Mallory *
Service Package: Driving Only *

Upload Template Client connect

Note: Columns marked in orange are required fields

- First, Middle and Last Names **must not** contain the following characters: \ : ? / .
- Email Address **must** be provided in the following format: fake@email.com
- Tracking Number, **if provided**, must be 255 characters or less.
- Cost Center, **if provided**, must be 25 characters or less.

The following Microsoft Office Excel file template will help you get started:

[Download Template](#)

Please use this template to fill out applicant information and submit it back in to our system by clicking the Choose a File button below.

Upload
Choose File No file chosen *

OPTIONAL - Additional Information Requested Client connect

You may request additional information from the applicant here:

- Education
- Employment
- Reference
- Professional License
- Driving License

[Cancel](#) [Submit](#)

Contact Us | 1-800-886-4777

Click **Submit**. You will receive a confirmation email when all orders on the upload have been created. Candidates will receive a welcome email with a link to access our CandidateConnect portal, sign their required forms, and provide their information.

Place an Order

- Applicant Order
- Applicant Entry
- Import Applicants
- Import Applicant Entries**

Orders

- In Progress **1**
- Completed (May.) **0**
- Paused **0**
- Applicant Auth. **0**
- Pending Interview **0**

Care Center

Teresa KammueLLer
952-358-7141
TKammueLLer@otes.com

Messages **0**

Manage Account

Import Applicant Entries

Location

Location: Corporate *
Order For: Mallory *
Service Package: Driving Only *

Upload Template

Note: Columns marked in orange are required fields

- First, Middle and Last Names **must not** contain the following characters: \ : ? / .
- Email Address **must** be provided in the following format: fake@email.com
- Tracking Number, **if provided**, must be 255 characters or less.
- Cost Center, **if provided**, must be 25 characters or less.

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[Download Template](#)

Please use this template to fill out applicant information and submit it back in to our system by clicking the Choose a File button below.

Upload
Choose File No file chosen *

OPTIONAL - Additional Information Requested

You may request additional information from the applicant here:

- Education
- Employment
- Reference
- Professional License
- Driving License

Cancel Submit

Contact Us | 1-800-886-4777