

THOMSON REUTERS CLEAR®

BATCH PERSON SEARCH QUICK REFERENCE GUIDE

Step 1: Log-in

- CLEAR (most common): clear.thomsonreuters.com
- Batch (for users without CLEAR): batch.thomsonreuters.com

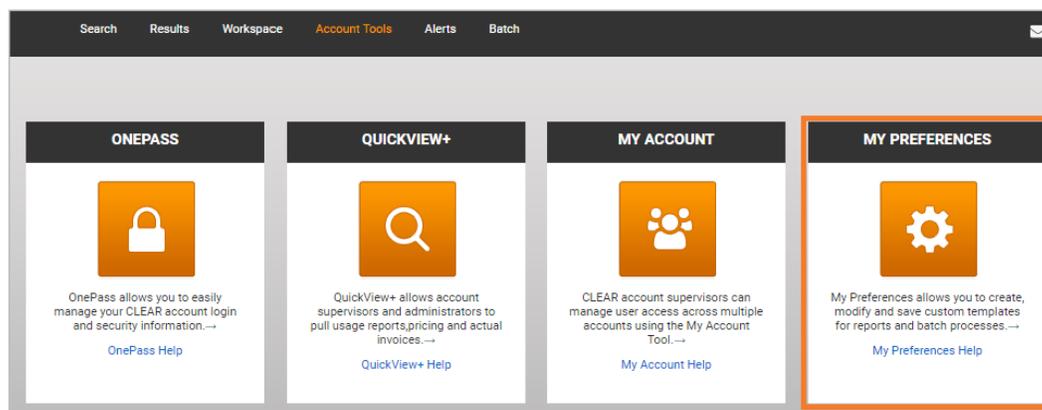
Note: Steps and screenshots will be for the CLEAR user interface. The stand-alone Batch site is very similar and the steps below should be good guidance for running a Batch Person Search.

Step 2: Go to My Preferences to customize your Batch settings

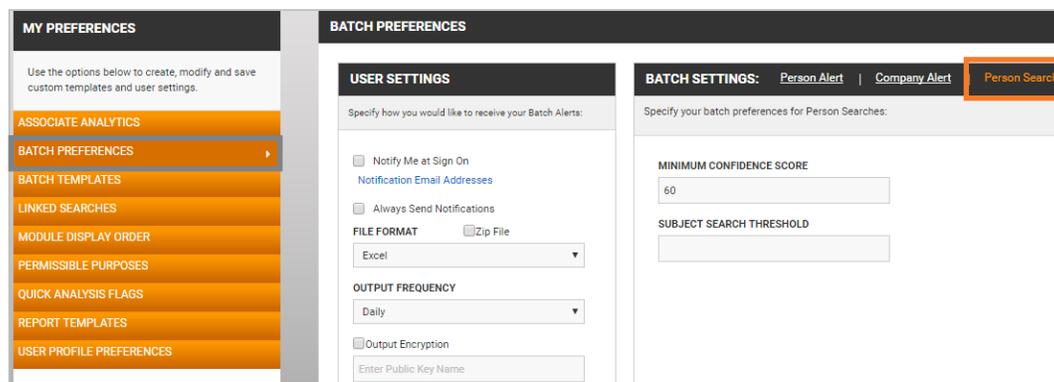
Choose your file format, minimum confidence score, and subject search threshold here.

On the toolbar at the top of the page, click **Account Tools**. Then click the gear icon under My Preferences (Step 2A).

Click the **Batch Preferences** tab on the left. On the right, make sure **Person Search** is selected (Step 2B).



Step 2A



Step 2B

Step 3: Select your file format

Default File Format = Excel

Step 4: Enter your minimum confidence score

The Minimum Confidence Score preference allows you to specify how closely Batch Person Search results must match your search inputs in order to appear in your output. Batch calculates how relevant possible results are to your inputs and assigns them a score ranging from 0 to 100. Subjects with higher scores have data that more closely align with your inputs. Those that meet or exceed the Minimum Confidence Score will return in the output file. The default value is set to 60.

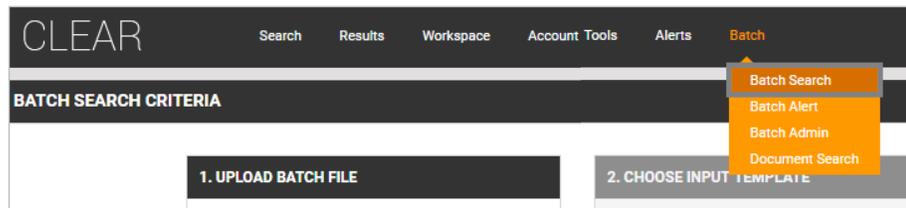
Step 5: Enter your subject search threshold

This optional preference allows you to provide a threshold limit for the number of search results returned for a subject.

A high volume of search results can indicate that more restrictive search criteria may be needed to return more relevant data associated with the subject. By entering a threshold limit, you can reduce the number of low match search results returned for a subject.

When search results exceed the threshold limit, the subjects are returned as validation errors. You can then modify the search criteria for these subjects to be resubmitted if applicable. Default Subject Search Threshold = BLANK.

Step 6: Go to Batch Search to begin file upload process



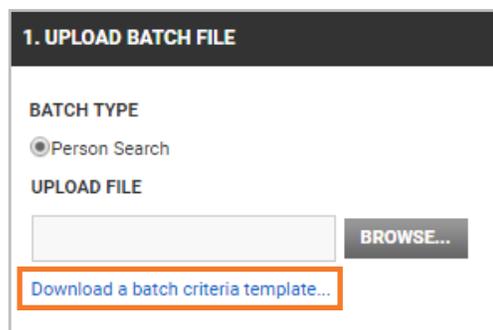
Step 6

Step 7: Downloading an input file to upload

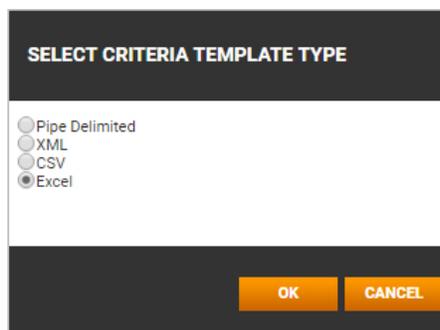
If you do not yet have an input file to upload, click the link [Download a batch criteria template](#) (Step 7A) and select your template type. If you do have a file ready, upload it now and continue to Step 9.

Your template type needs to match the File Format (Step 7B) you selected in Step 3. Excel is most common.

Click OK, and your input file template will download to your computer.



Step 7A



Step 7B

Step 8: Completing the input file (for Excel)

Fill in the fields you have data for (Step 8). To understand the minimum amount of information you need to return results, visit the Online Help section of CLEAR (see page 6), click Batch, and then Minimum Search Criteria.

Save the file and upload.

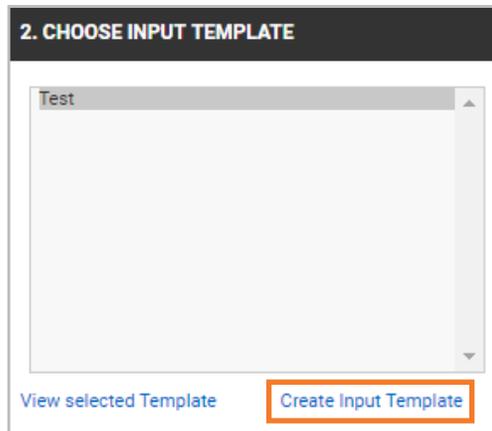
Note: The Request ID and User Data Fields are for supplying unique search ID numbers and/or any other information you would like to have for reporting or tracking purposes. This will not affect your results.

	A	B	C	D	E	F	G
	REQUEST ID	USER DATA FIELD 1 (Single/Married/Divorced/ Partner)	LAST NAME	MIDDLE NAME	FIRST NAME	DOB	SSN
1							
2	123	Married	Sample-Doc		Jane	5/9/1961	888-55-5555
3							
4							

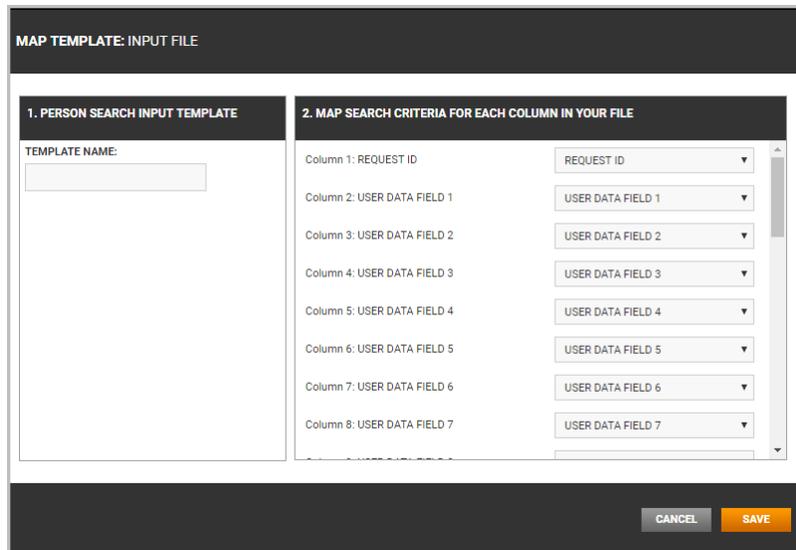
Step 8

Step 9: Choose your input criteria

On step 2 of the Batch Search Criteria page, click Create Input Template (Step 9A). This will allow you to choose what columns you want to use on your input file (Step 9B). After you select your columns and name your template, click Save.



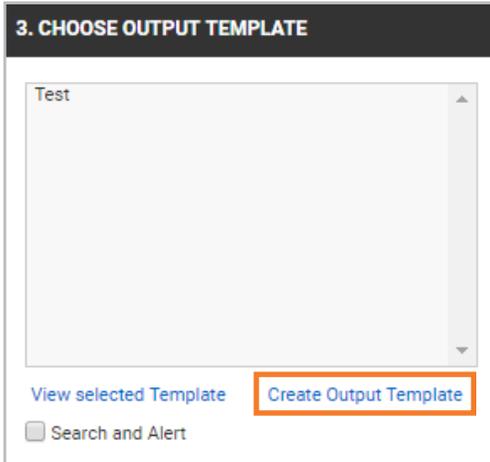
Step 9A



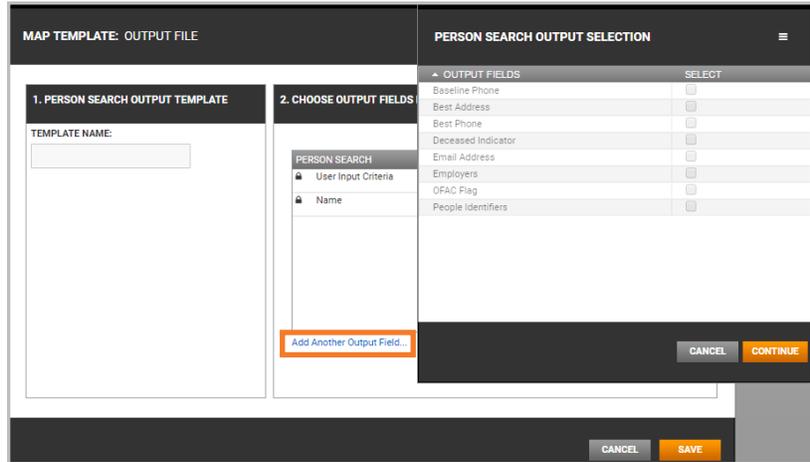
Step 9B

Step 10: Choose your output criteria

On step 3 of the Batch Search Criteria page, click **Create Output Template** (Step 10A). Select **Add Another Output Field** and then select your desired fields (Step 10B). When you are finished, click **Continue**, name your template, and then click **Save**. **Note:** Additional costs apply for selecting multiple output fields.



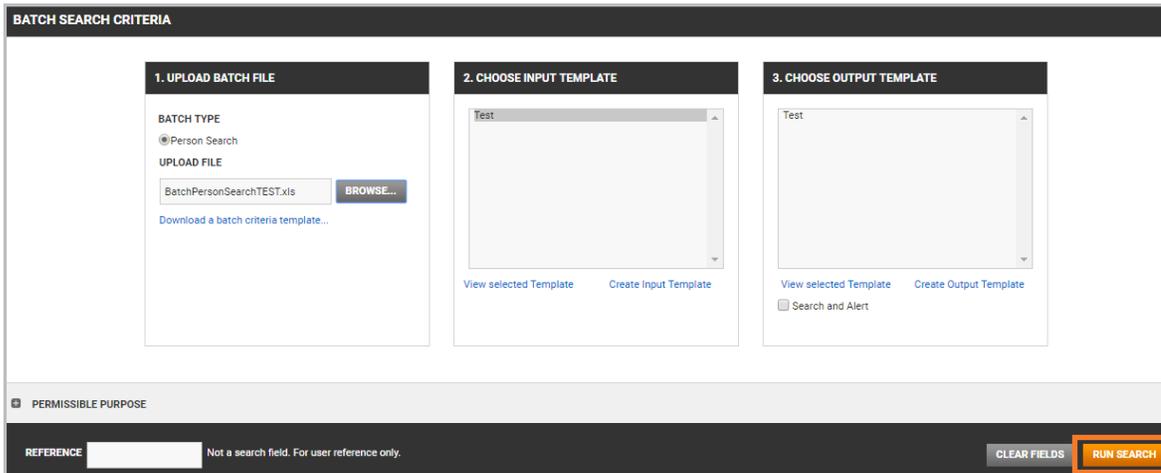
Step 10A



Step 10B

Step 11: Run your input file

After you complete the steps on the site, click **Run Search** to process your request (Step 11).

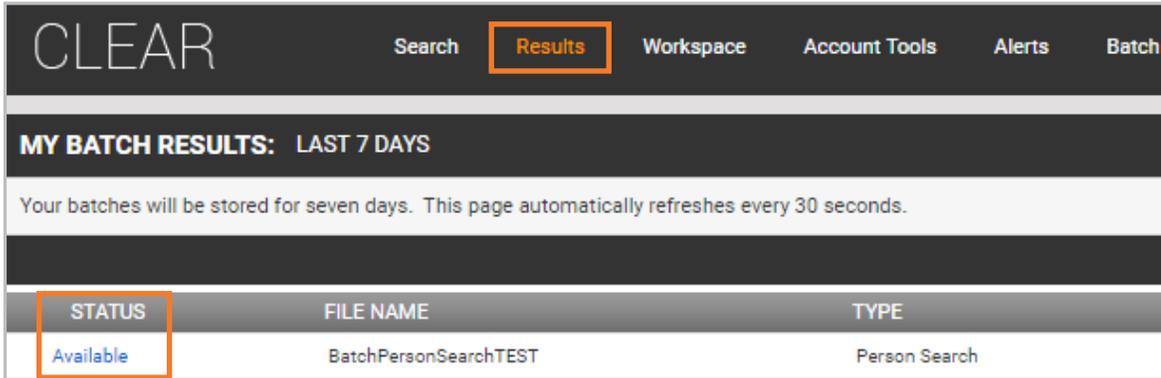


Step 11

Step 12: Find your Batch results

You will be taken to a different page where your Batch results are stored for 7 days (Step 12). The length of time your file takes to process depends on the size. When your file is ready, the status will change to **Available**.

Note: You can also customize your Batch Preferences to be notified via email or at sign-on.

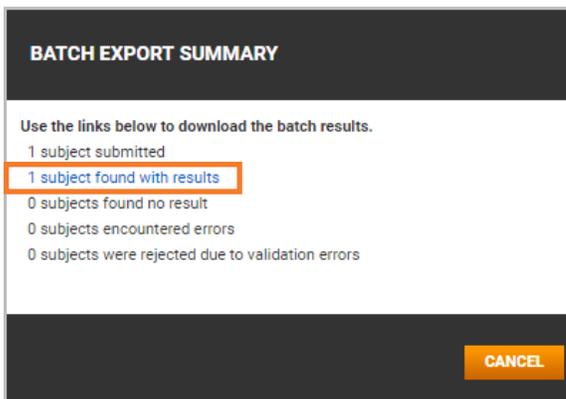


STATUS	FILE NAME	TYPE
Available	BatchPersonSearchTEST	Person Search

Step 12

Step 13: View your Batch results

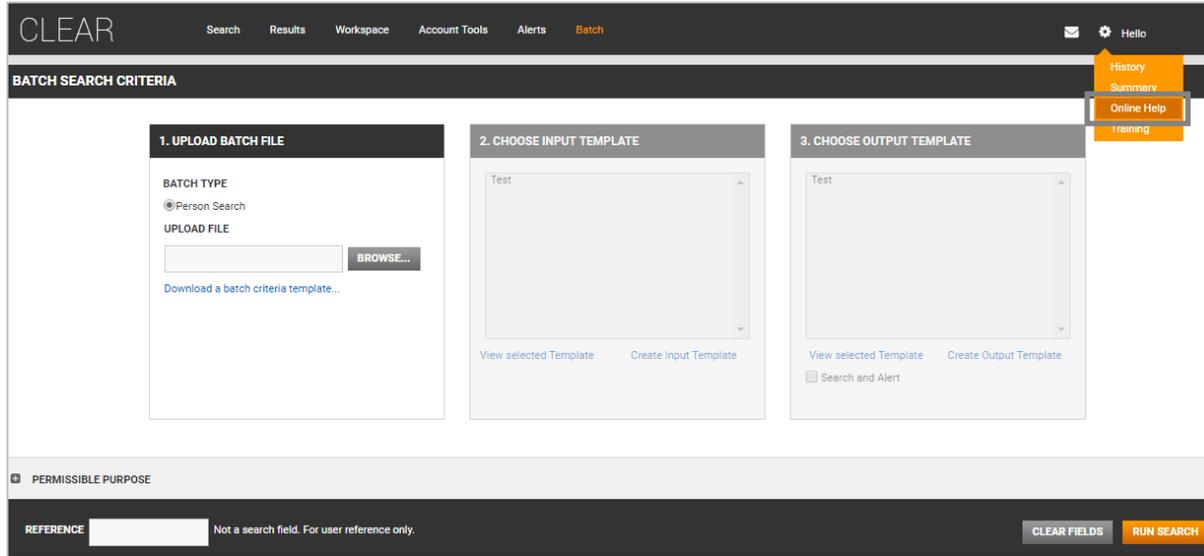
Click the **Available** link. A pop-up will appear showing the summary of your results (Step 13). To download and view your files, click the link highlighted in blue. After you click the link, the results will be downloaded to your computer.



BATCH EXPORT SUMMARY	
Use the links below to download the batch results.	
1 subject submitted	
1 subject found with results	
0 subjects found no result	
0 subjects encountered errors	
0 subjects were rejected due to validation errors	
CANCEL	

Step 13

For more detailed information on preferences, input/output files, or anything else Batch/CLEAR related, please visit CLEAR Online Help.



Learn more at legalsolutions.com/clear

To order or for more information, contact your representative at 1-800-762-5272.

