cornerstone

ADP Work Opportunity Tax Credit

Edge Integration Guide

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Version history

	DATE	DESCRIPTION
7.0	07/03/2018	• Added Version Control • Added a new section “Setup Instructions – Test Environment” • Added a new section “Troubleshooting”
8.0	08/05/2019	• Added the following sections: Prerequisite, Considerations, Prerequisite Setup • Replaced “Try it Free” with “Install” in Cornerstone Setup Instructions

Overview

The Cornerstone-ADP Work Opportunity Tax Credit (WOTC) integration enables organizations to identify applicants that may qualify for tax credit programs using ADP's WOTC assessments. With this integration, recruiters can assign applicants to a WOTC assessment and track its status and results from within Cornerstone's Recruiting system. Further, the candidate may launch the assessment when completing their application in Cornerstone.

Prerequisites

- Cornerstone Recruiting
- ADP WOTC Account
- Before you begin configuring the integration in Cornerstone, you must purchase WOTC product from the ADP Marketplace and work with your ADP project team to configure the WOTC product.

Considerations

- Mobile App - This functionality is not available in the mobile app. If the survey is included in a step of the application workflow, the step will be skipped in the mobile app.
- Retroactive Application - WOTC surveys cannot be retroactively applied to requisitions prior to enabling of the integration, even though these requisitions are in open/active status.
- Social Security Number - With this integration, ADP will collect the candidate's Social Security Number at the time the candidate is completing the WOTC survey.
- Application Workflow Set-Up - ADP WOTC surveys cannot be a required step in the application workflow.
- The Location OU ID associated with the job requisition should match the work location IDs in ADP.
- As best practice, the Offer Letter applicant status should be marked required. This ensures that hire data are transmitted to ADP when a candidate is moved to the Hired status.

Setup instructions: Test environment

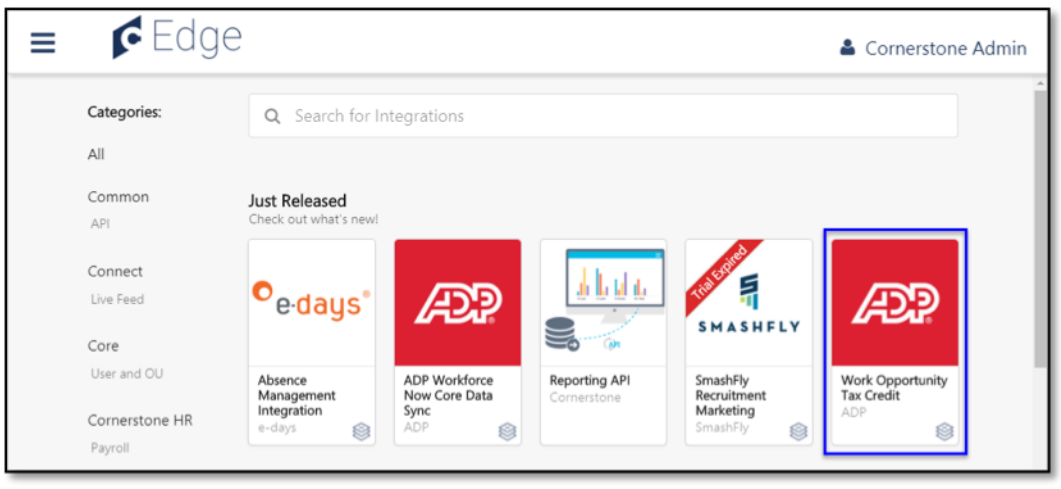
It is highly recommended to test the integration in either your Cornerstone Stage or Pilot environment prior to installing and enabling the integration in Production. To proceed with this, please follow the steps below.

In ADP

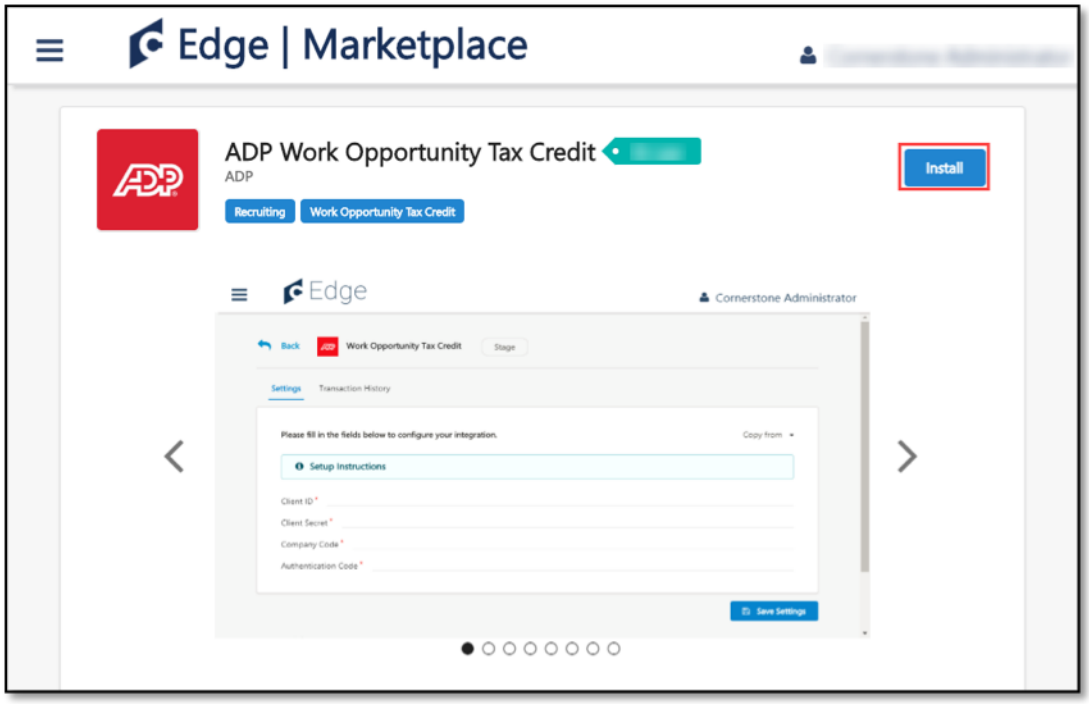
1. Work with your ADP Tax Credit representative to retrieve the credentials below.
   - Client ID (required)
   - Client Secret (required)
   - Company Code
   - Authentication Code
2. Work with your ADP Tax Credit representative to configure your ADP portal.

In Cornerstone

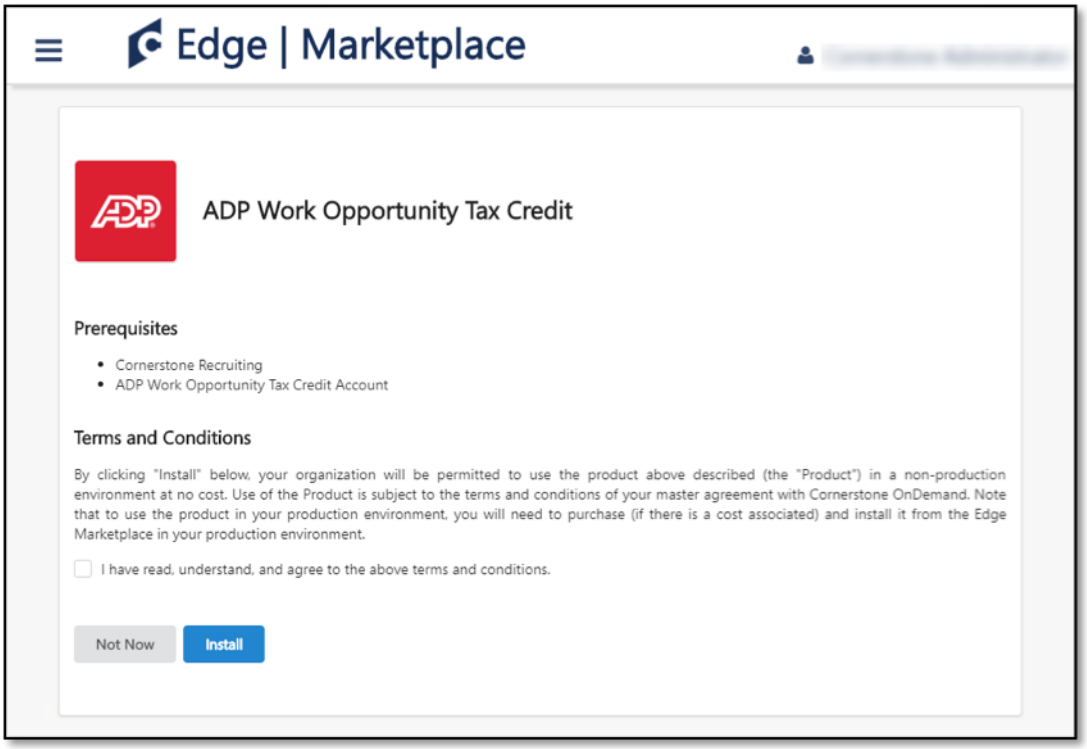
1. Log in to the Cornerstone portal and navigate to the Edge Marketplace (Admin > Tools > Edge > Marketplace).
   - Search for the ADP Work Opportunity Tax Credit integration by entering either “ADP” or “WOTC” in the search box.



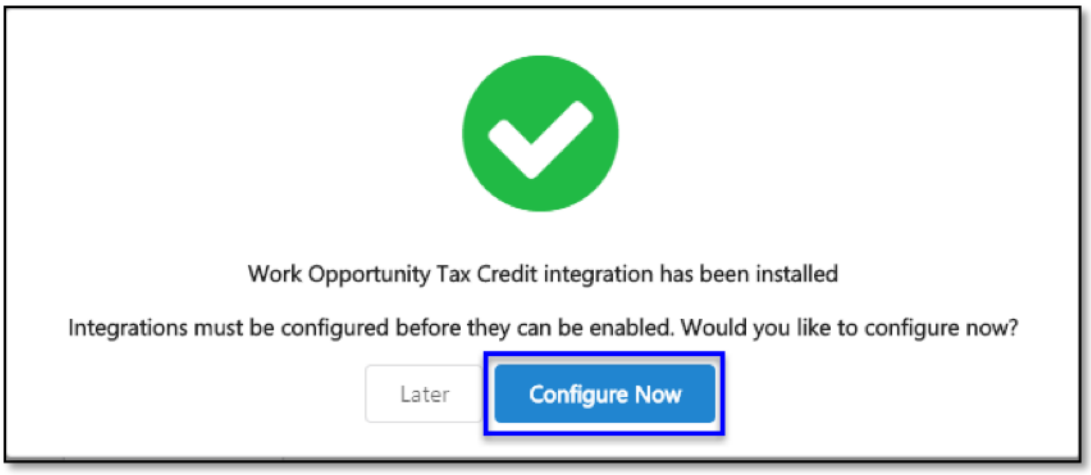
2. Click on the ADP Work Opportunity Tax Credit tile to purchase the integration.
3. Click on “Install” to install the integration.



4. Review the Terms and Conditions. If you would like to proceed with installing the integration, select the checkbox for “I have read, understand, and agree…” and click “Install”. Otherwise, select “Not Now”.

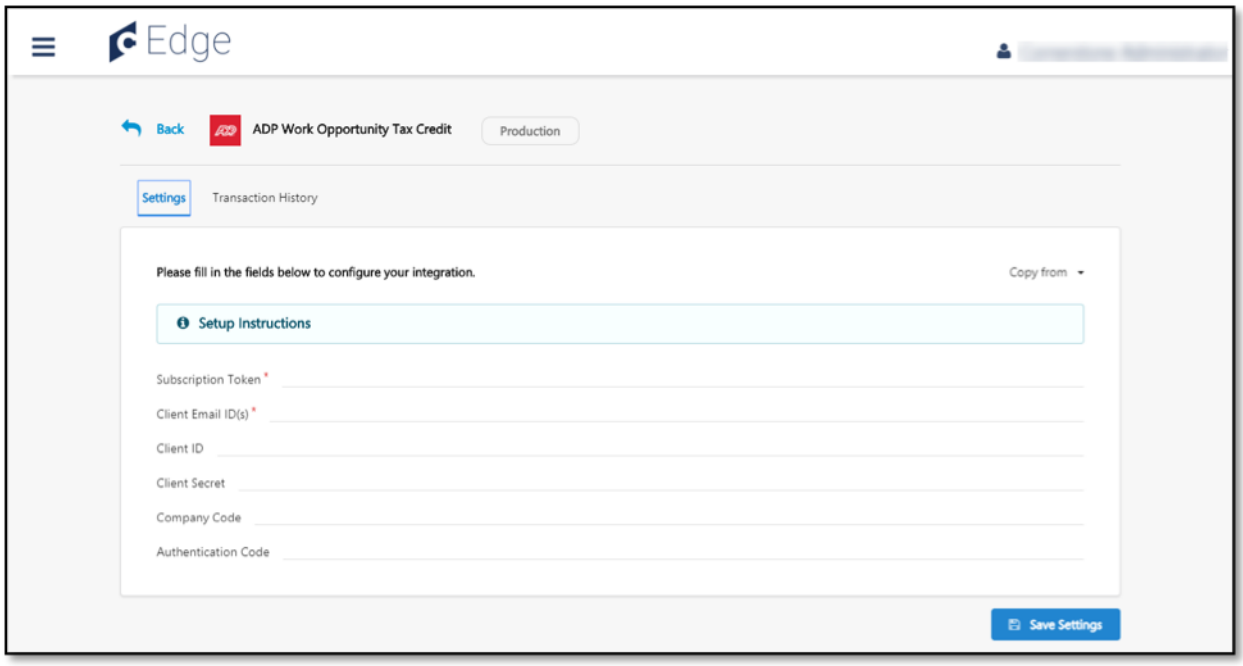


5. Click on the “Configure Now” button which will direct you to the Edge Settings page to configure the integration.



6. Manually enter the Subscription Token, Client Email IDs, Client ID, Client Secret, Company Code, and Authentication Code then click the Save Settings button.
   - **Subscription Token** is the token generated after the integration is purchased on ADP Marketplace. This is a required field. For testing purposes, enter any dummy data in the field.
     - In Production, you will receive the Subscription Token via email. See Setup Instructions – Production Environment for details.
   - **Client Email ID(s)** is the email address where enablement notifications will be sent. Please separate multiple emails with a comma. This is a required field. For testing purposes, enter any dummy data in the field.
   - **Client ID** is a client-specific value provided to you by your ADP Tax Credit representative.
     - In Production, this value will be auto-populated upon saving the Settings page. See Setup Instructions – Production Environment for details.
   - **Client Secret** is a client-specific value provided to you by your ADP Tax Credit representative.
     - In Production, this value will be auto-populated upon saving the Settings page. See Setup Instructions – Production Environment for details.
   - **Company Code** is your organization’s unique code for the WOTC product. This is an optional field to set up the integration in Cornerstone. However, it is required if your organization has multiple ADP instances. Your ADP project team will provide your Company Code.

- **Authentication Code** is your organization's unique code for the WOTC product. This is an optional field to set up the integration in Cornerstone. However, it is required if your organization has multiple ADP instances. Your ADP project team will provide your Company Code.

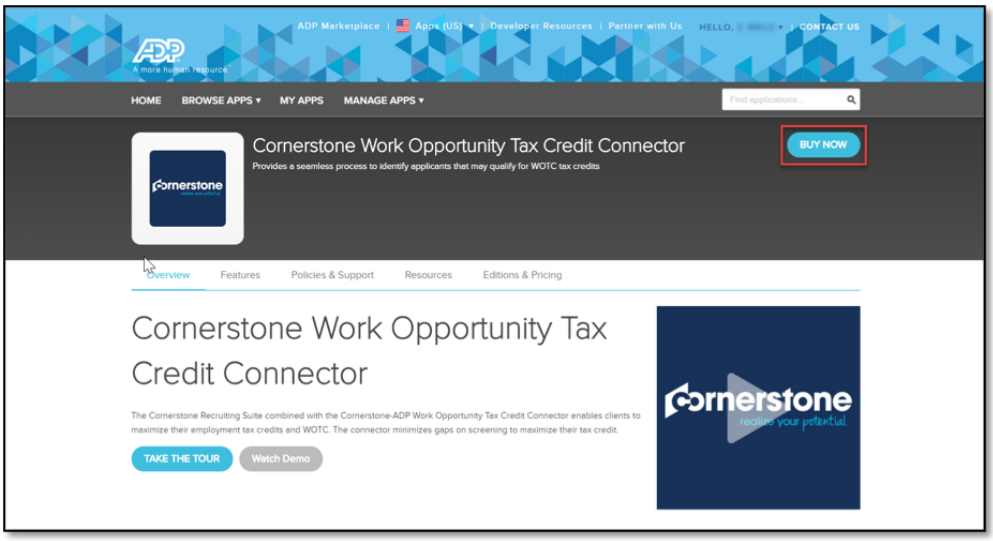


7. Upon saving the Settings page, you will be directed to the Manage Integrations page. Enable the ADP Work Opportunity Tax Credit integration by turning on the toggle switch.

Setup instructions: Production environment

In ADP

1. Search and select the “Cornerstone Work Opportunity Tax Credit Connector” app in your ADP Marketplace at https://apps.adp.com/apps.
2. Purchase the app by clicking BUY NOW



3. Upon purchasing the integration from the ADP Marketplace, you will receive an email from Cornerstone with your subscription token. Please keep this email as this will be required when setting up the integration in Cornerstone.

NOTE: If you did not receive the subscription email, please do the following:

i. Verify your email address used for notification in ADP under Communication Preference

ii. Check your spam/junk box

iii. Cancel the subscription and re-purchase the app in ADP Marketplace

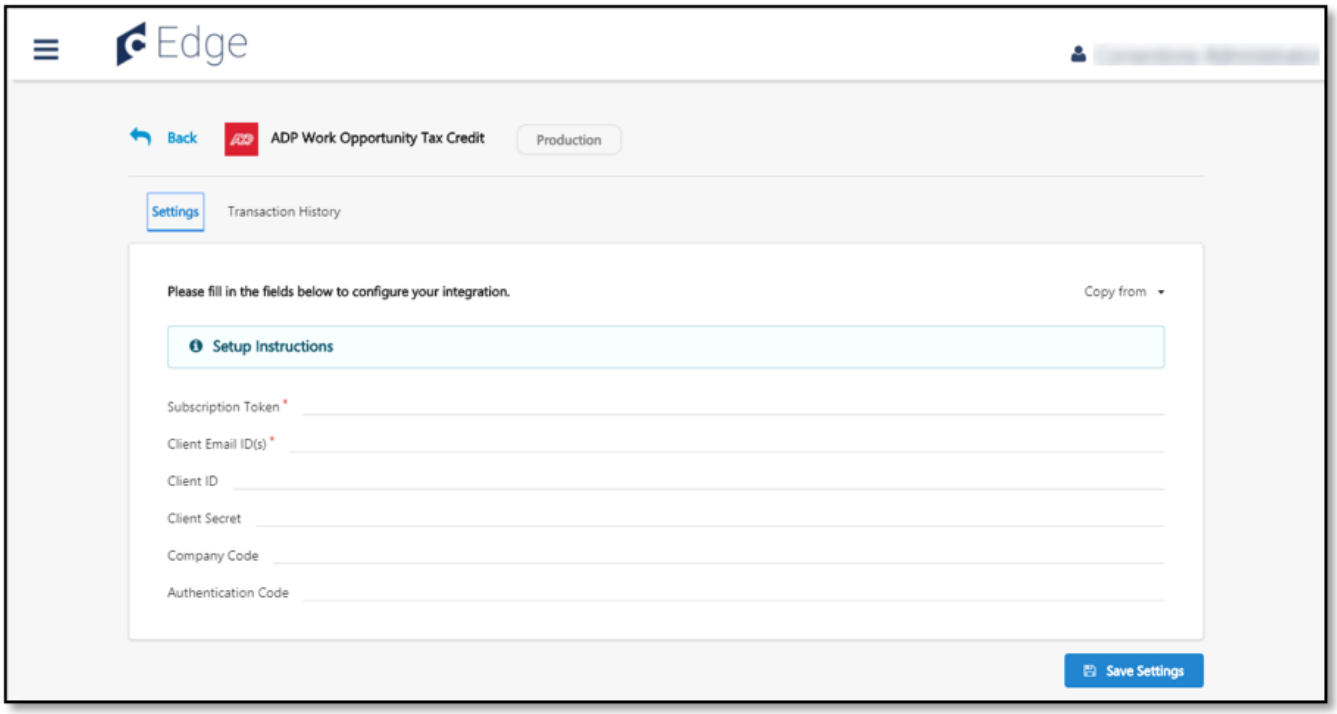
4. Navigate to “MY APPS” tab and select the Cornerstone Work Opportunity Tax Credit Connector app.
5. Review ADP’s Consent Request and click on Allow. By clicking on Allow, you are providing your consent for ADP to share data with Cornerstone. A confirmation message will be displayed. On the screen. Please note that this step is required to enable the integration between Cornerstone and ADP.
6. Click Continue to be redirected to the MY APPS page. This completes the subscription process.

In Cornerstone

1. Log in to the Cornerstone portal and navigate to the Edge Marketplace (Admin > Tools > Edge > Marketplace).
    - Search for the ADP Work Opportunity Tax Credit integration by entering either “ADP” or “WOTC” in the search box.
2. Click on the ADP Work Opportunity Tax Credit tile to purchase the integration.
3. Click on “Install” to install the integration.
4. Review the Terms and Conditions. If you would like to proceed with installing the integration, select the checkbox for “I have read, understand, and agree…” and click “Install”. Otherwise, select “Not Now”.
5. Click on the “Configure Now” button which will direct you to the Edge Settings page to configure the integration.

6. Populate the Subscription Token, Client Email IDs, Company Code, and Authentication Code then click the Save Settings button.

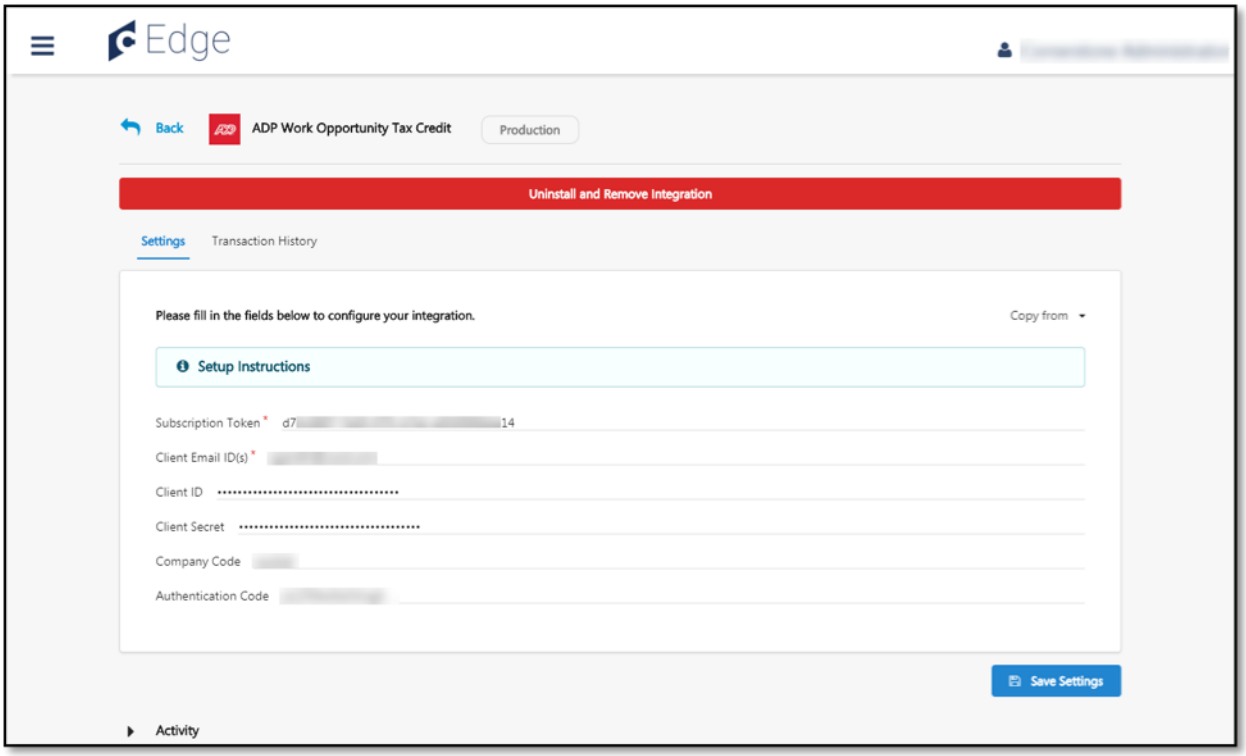
   - **Subscription Token** is the token you received by email (see step 3 in Setup Instructions > In ADP). This is a required field.
   - **Client Email ID(s)** is the email address where enablement notifications will be sent. Please separate multiple emails with a comma. This is a required field.
   - **Company Code** is your organization's unique code for the WOTC product. This is an optional field to set up the integration in Cornerstone. However, it is required if your organization has multiple ADP instances. Your ADP project team will provide your Company Code.
   - **Authentication Code** is your organization's unique code for the WOTC product. This is an optional field to set up the integration in Cornerstone. However, it is required if your organization has multiple ADP instances. Your ADP project team will provide your Company Code.



7. Upon saving the Settings page, you will be directed to the Manage Integrations page. Enable the ADP Work Opportunity Tax Credit integration by turning on the toggle switch.

8. Navigate back to the Settings page by clicking on the ADP Work Opportunity Tax Credit integration.

9. On the Settings page, confirm that the Client ID and Client Secret fields are auto-populated. The value displayed will appear masked.



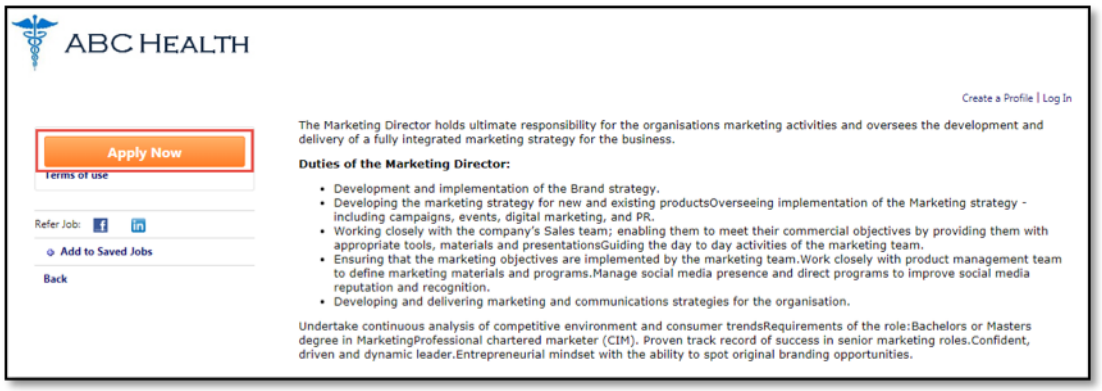
Assign ADP WOTC Assessment

ADP WOTC assessments can be included in the application workflow of a job requisition and can also be assigned to applicants from the Manage Applicants page.

Application Workflow

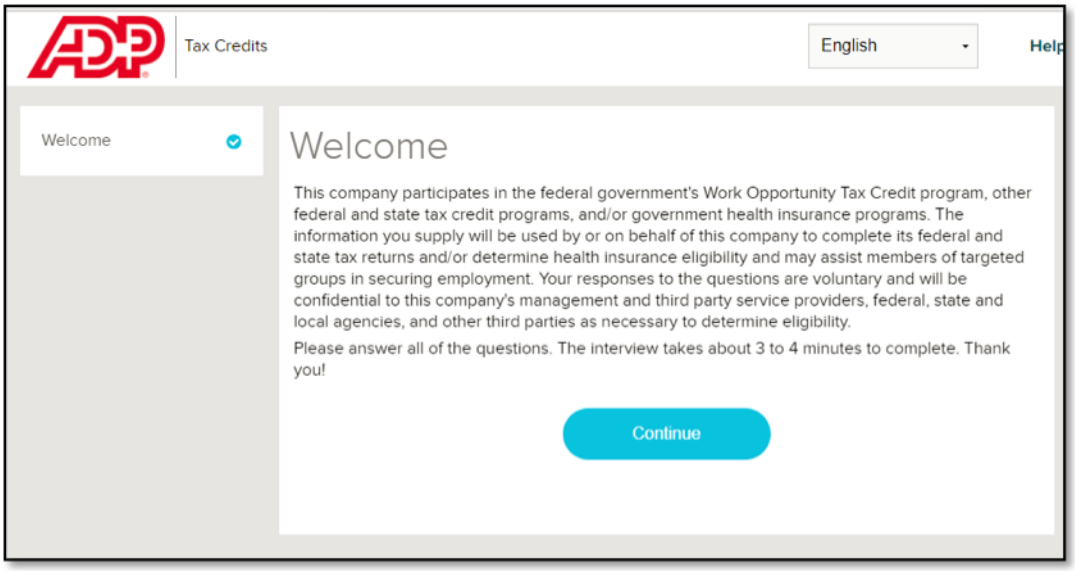
When included in the application workflow, the assessment is part of the process of applying for the job (see Appendix A).

1. Candidate navigates to Cornerstone Career Site and applies for a job.



2. When candidate reaches the WOTC assessment step in the application workflow, candidate clicks on the Launch button.

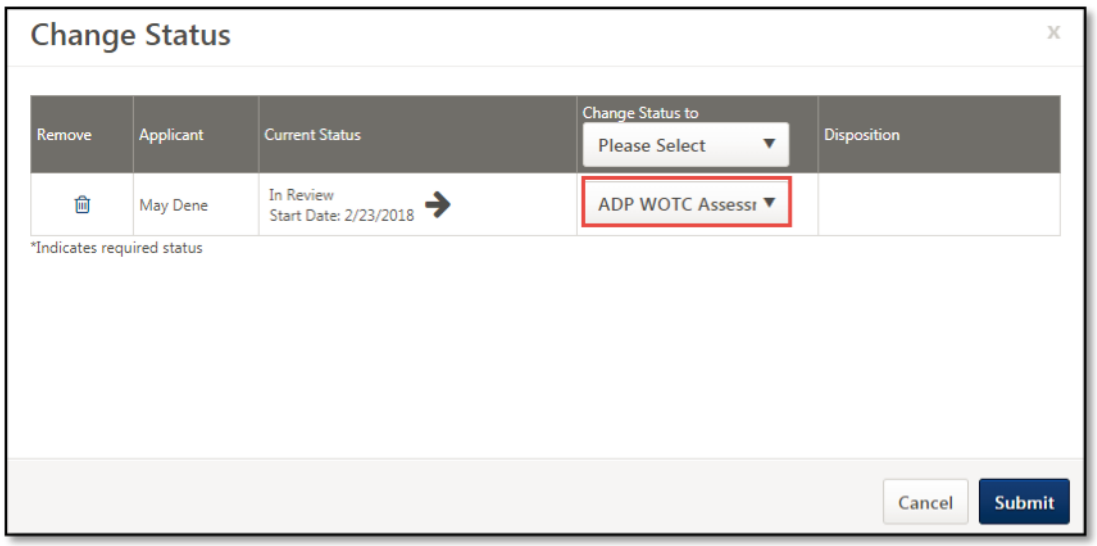
3. Candidate is re-directed to a pop-up window where candidate will complete the ADP WOTC assessment.



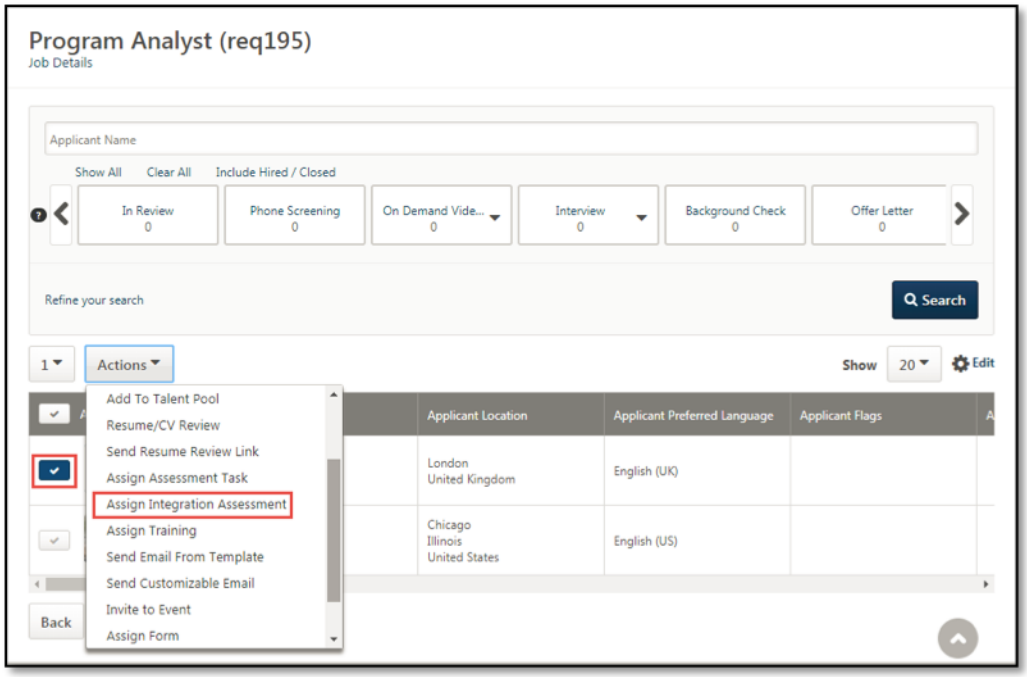
Manage Applicants

When assigned via the Manage Applicants page, recruiters specify which applicants will be assigned to the assessment (see Appendix B).

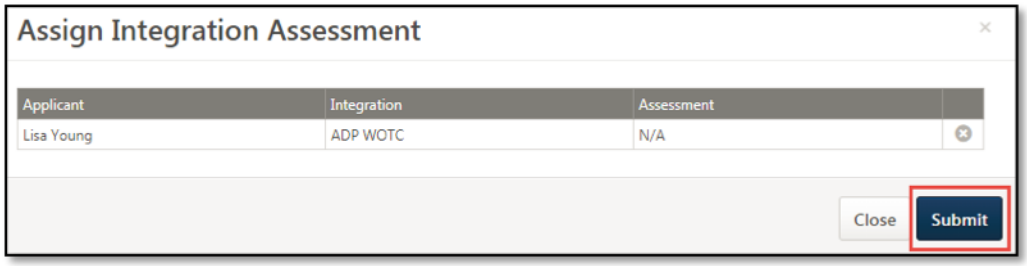
1. Navigate to the Manage Applicant page and locate the candidate record that will be assigned the WOTC assessment.
2. Change the candidate status to the custom applicant status created specific to the ADP WOTC integration.



3. On the Manage Applicants page, select the candidate to be assigned the WOTC assessment then select “Assign Integration Assessment” from the Actions dropdown.

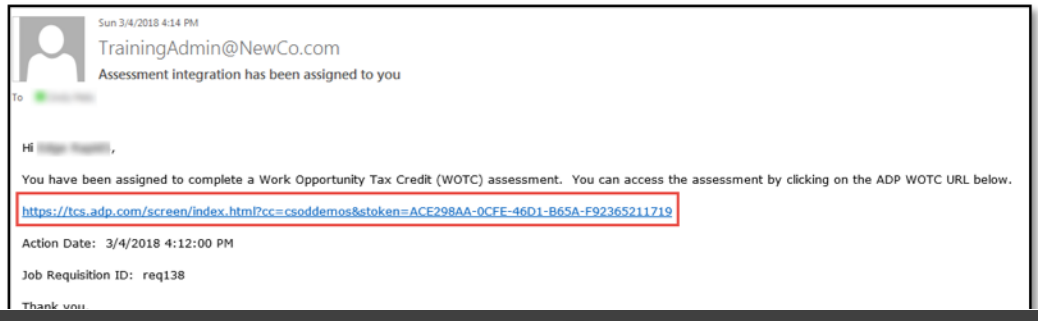


4. Click on the Submit button.

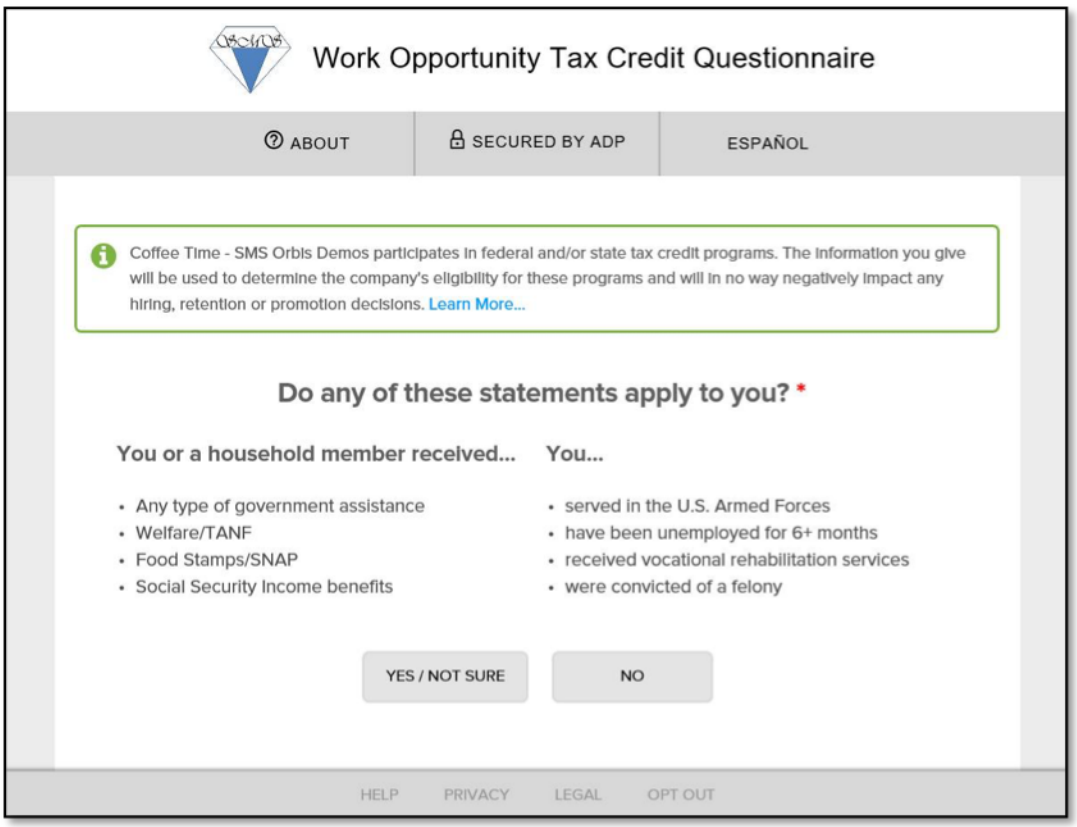


5. Candidate will receive an email from Cornerstone that includes the ADP WOTC assessment URL.

   - The Assign Integration Assessment email is triggered when configured in Email Administration. The APPLICANT.INTEGRATION.ASSESSMENT.LINK tag will need to be included in the email.



6. Candidate will click on the ADP WOTC assessment URL in the email.
7. Candidate will be redirected to ADP system to complete the WOTC assessment.

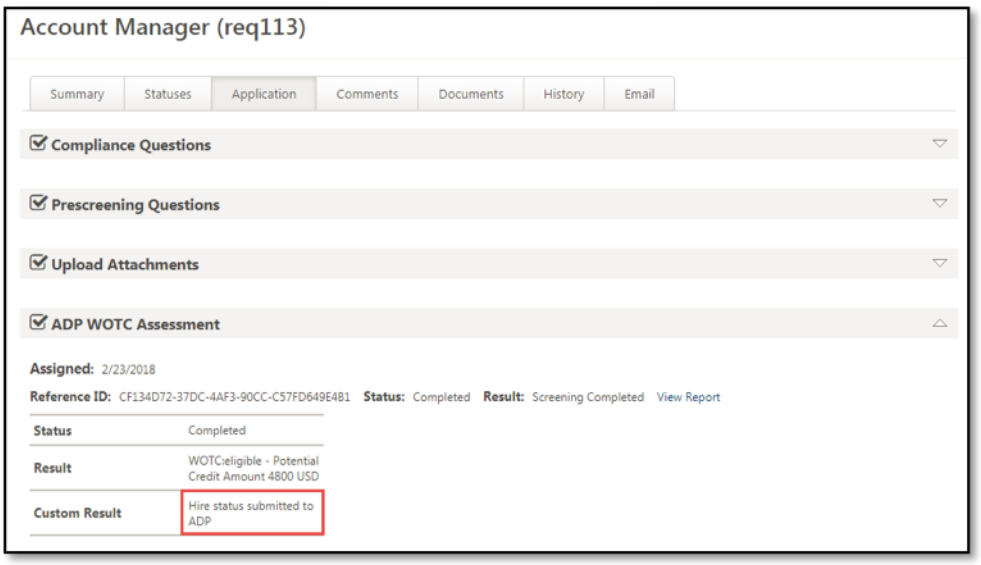


Sending Offer Letter to Candidate

If a recruiter would like to extend an offer to the candidate, the tags below need to be included in the offer letter to the candidate. These data will be sent to ADP once the candidate status is moved to “Hired”.

- Offer.Hourly.Rate OR Offer.Salary
- Offer.Date
- Offer.Start.Date

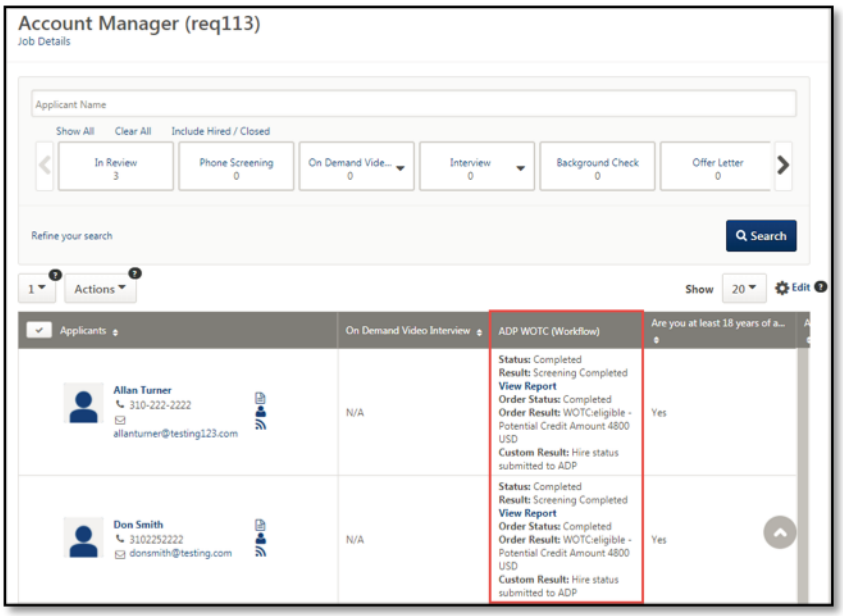
If a hire call is sent to ADP, the text “Hire status submitted to ADP” will appear in Custom Result.



View ADP WOTC Assessment Results

Recruiters can view the results of the ADP WOTC assessments on either the Manage Applicants page or the Applicant Profile > Application tab. Results are updated every 6 hours.

- Manage Applicant



- Application

- Candidates whose assessment status is either In Progress or Incomplete AND for those who have an assessment assign date of 60 days or less from the time the scheduler runs will be updated.
- Candidates whose assessment status is in either In Progress or Incomplete AND have an assessment assign date of 61 days or more (from the time the scheduler runs) will be marked Cancelled.

Appendix
A. Create custom application workflow template

This set up is required when adding an ADP WOTC survey as a step within a job requisition application workflow.

1. Navigate to the Application Workflow Templates page (Admin > Tools > Recruit > Applicant Workflow Templates)
2. Click on “Create Template” link. This action directs the admin to the Create Template page.
3. Complete the fields on the Create Template page.
    - Name – Enter a descriptive name for the application workflow template. If multiple languages are enabled, select the language from the drop down list for which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop down list and enter the localized name and description in the appropriate fields.
    - Description – Enter a description for the application workflow template. This should describe the purpose of the workflow. The character limit for this field is 100.
    - Add a Section – Click on the Add a Section icon. This opens the Add Section pop-up window.
        - Tile – Enter a descriptive value in the field, which has a character limit of 50.
        - Click on the Save button.
    - Add Action Item – Select "Custom Integration" from the Add Action Item drop down. This opens the Edit Action Item pop-up window. Complete the following fields in the pop-up window:
        - Title – Enter a descriptive value in the Title field which is a required field. This character for this field is 50
        - Instructions – Enter instructions for the action item. This field is optional. It accepts HTML and does not have a character limit.
        - Integration – Select "ADP WOTC"
    - Click Save to save the action item.
4. Click Save to save the application workflow template.
5. Create a new job requisition to include the application workflow template.

B. Create custom applicant status

This set up is required when candidate is assigned an assessment outside the application workflow (i.e. ad hoc assignment via the Manage Applicant page). NOTE: The Assign Integration Assessment email trigger email will need to be successfully configured in order for the applicant to receive an email (email template must include "APPLICANT.INTEGRATION. ASSESSMENT.LINK" tag).

1. Navigate to Admin > Tools > Recruit > Application Statuses
2. Select the top OU level link
3. Click the Create Custom Status link which opens the Create Custom Status pop-up window.
4. Complete the following fields in the Create Custom Status pop-up:
    a. Language - If multiple languages are enabled, from the drop-down list select the language in which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop-down list and enter the localized name and description in the appropriate fields.
    b. Display Name - Enter "ADP WOTC" (or desired display name) to identify the status as being specifically for ADP WOTC assessments. This field accepts up to 50 characters. If you change the display name after it is in use:
        - The new display name appears on the Default Status List page.
        - The new display name appears in the Status list on the job requisition template.
        - Any new job requisitions created after the display name is changed will apply the new display name.
        - Job requisitions created before the status display name is changed will continue to honor the name that existed at the time the requisition was created.
    c. Description - Enter a description, up to 500 characters. As a best practice, provide a description that helps recruiters understand the purpose of this status.
    d. Type - Select "Custom Integration." The Custom Integration status type means that the applicant is in an integration step of the status workflow. When creating a custom status for a child organizational unit (OU), the Type field displays the type selected for the parent OU but is not editable.
    e. Integration - Select "ADP WOTC" in this field, which will associate the custom status to ADP WOTC integration.
    f. Active - This option is selected by default and means the status will be available to include in status workflows.
5. Click SAVE to save the custom status.
6. Click Save on the Manage Applicant Statuses page.
7. Add the new custom applicant status to the job requisition.

C. Security permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Assign Assessment Integration	This permission gwrants access to manage assessment integrations from the Applicant Profile page. This applies to assessments that have been configured in the integration center.	Recruiting
Applicants: View Assessment Integration Status	This permission allows a user to view the assessment integration check status. The user cannot view the link to the detailed report.	Recruiting
Applicants: View Assessment Integration Status and Details Link	This permission Allow user to view the assessment integration status and view link to access assessment report.	Recruiting

D. Troubleshooting

1. For Cornerstone-related WOTC issues, please submit a Global Product Support (GPS) ticket through the Client Success Center.
2. For ADP-related WOTC issues, please send an email to the ADP Tax Credits team at ADPTaxCredits_Integration_Support@adp.com.