



AccurateAce Background Check Integration

Edge Integration Guide

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Version history

VERSION	DATE	DESCRIPTION
2.0	April 23, 2021	<ul style="list-style-type: none">• Reformatted starter guide and updated provider and integration names

Overview

The AccurateAce Background Check integration enables recruiters to assign background checks and/or drug screenings to candidates, track its progress, and get a high-level update on the request from within Cornerstone's Recruiting system.

Installation and Configuration Instructions

The AccurateAce Background Check integration enables recruiters to assign background checks and/or drug screenings to candidates, track its progress, and get a high-level update on the request from within Cornerstone's Recruiting system.

In AccurateAce

Work with your assigned AccurateAce implementation team on the following items:

- a. retrieve your company's unique Customer ID
- a. set-up background check packages

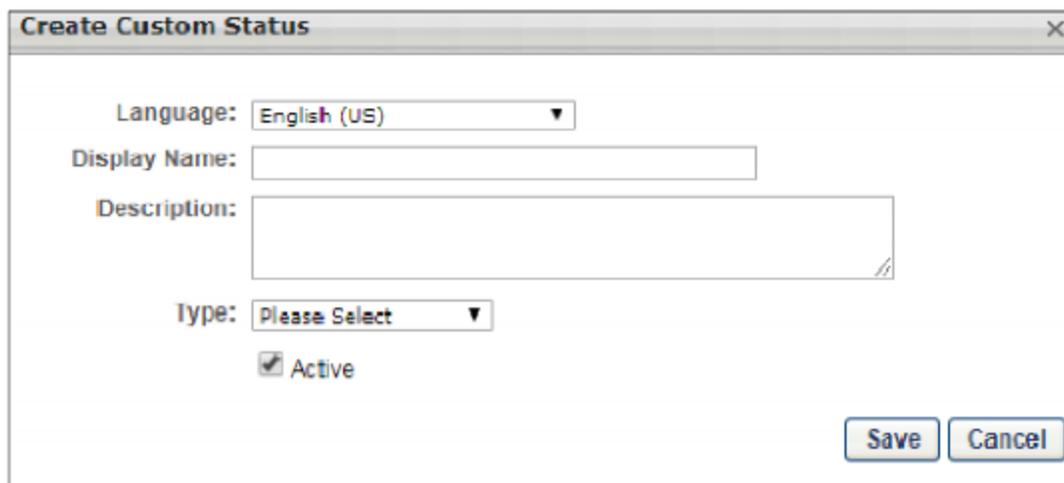
In Cornerstone

1. Log in to the Cornerstone portal and navigate to the Edge Marketplace (Admin > Tools > Edge > Marketplace).
2. Search and click on the AccurateAce Background Check integration tile
3. Click Install.
4. Review the terms and conditions then select the checkbox for I have read, understand, and agree to the above terms and conditions. Click on Install.
5. Click on Configure Now which will direct you to the Edge Settings page to configure the integration.
6. Enter a value in Customer ID. Customer ID is a client-specific ID used by AccurateAce to authenticate requests from Cornerstone. This is a required field and provided by your AccurateAce implementation project team.
7. Click on Save Settings which will direct you to the Manage Integrations page.
8. Enable the AccurateAce Background Check integration by turning on the toggle switch.

Cornerstone Recruiting configuration

Administrators must create a new custom applicant status to be used for the AccurateAce background check integration. This set up is required to allow candidates to be assigned to a background check request.

1. Navigate to **Applicant Statuses** (Admin > Tools > Recruit) and select the appropriate Division OU.
2. Click on the **Create Custom Status** link. This opens the Create Custom Status pop-up.



The screenshot shows a 'Create Custom Status' dialog box. It includes the following fields and controls:

- Language:** A dropdown menu currently set to 'English (US)'.
- Display Name:** An empty text input field.
- Description:** An empty text area for a longer description.
- Type:** A dropdown menu currently set to 'Please Select'.
- Active:** A checked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

3. Complete the fields in the pop-up.
 - **Language** – To localize the status name and description into other available languages, select the appropriate language from the dropdown list and enter the localized name and description in the appropriate fields

- **Display Name** – The status name which appears throughout the system. The character limit for this field is 50. Enter the desired display name to identify the status as being specific for the AccurateAce Background Check integration. If you change the display name after it is in use:
 - i. The new display name appears on the Default Status List page.
 - ii. The new display name appears in the Status list on the job requisition template.
 - iii. Any new job requisitions created after the display name is changed will apply the new display name.
 - iv. 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.
 - **Description** – Describe the purpose of the status and what is implied when an applicant is in that status. The character limit for this field is 500. This is not a required field.
 - **Type** – Select “Custom Integration” from the dropdown. Note: This field is displayed only when creating a custom status at the top level OU. When creating a custom status for a child OU, the Type field displays the type selected for the parent OU but is not editable.
 - **Integration** – Select Custom Background Check from the dropdown.
 - **Active** – This option is selected by default and means the status will be available to include in status workflows.
4. Save the custom applicant status.
 5. Add the new custom applicant status to a job requisition template. Then, create a requisition using this requisition template.

Cornerstone Employment and Education Resume Configuration

This step is required only if you want to send an applicant's education and/or employment resume data as part of the background check request to AccurateAce. If Employment and/or Education resumes sections are mapped in your portal and a candidate entered their employment and/or education data, then Cornerstone will automatically send over these data to AccurateAce.

Note: The Upload Attachment action item will need to be included in the job requisition's application workflow template to allow applicants to enter their resume data in the Education and Employment fields that are mapped for AccurateAce when filling out the application.

Education Fields

Education fields must be mapped in Succession > Resume in order for Cornerstone to pass the applicant's data to AccurateAce. The name of the field in Cornerstone (as defined in the Field Name field on the Add Field pop-up on the Resume > Education page) does not need to match the name of the field in AccurateAce, but it must be mapped correctly to the corresponding Applicant Mapping field in your portal in order for the data to pass successfully to AccurateAce.

To map the fields:

1. Navigate to Admin > Tools > Succession Management > Resume
2. Select the Edit icon in the Education row.
3. Ensure that Education is selected in the Applicant Resume drop-down.
4. Configure or create the following fields and select the appropriate mapping option in the Applicant Mapping column:

Field Name in AccurateAce	Select This Option in Dropdown in Applicant Mapping Column	Field Type
Institution	Institution	Short Text Box; AccurateAce allows a candidate up to three records
Degree	Degree	Dropdown; AccurateAce allows a candidate up to four entry records
Degree Major	Area of Study	Short Text Box; AccurateAce allows a candidate up to four entry records candidate up to four entry records
Degree Date	Graduation Date	Date Field; AccurateAce allows a candidate up to four entry records

DEFAULT POSITION	NAME	DISPLAY FIELD NAME	TYPE	APPLICANT MAPPING	APPLICANT POSITION	REQUIRED	ACTIVE	OPTIONS
1	Institution	☑	Short Text Box	Institution	1	☑	☑	🗑️ 📄
2	Degree Name	☑	Dropdown	Degree	2	☐	☑	🗑️ 📄
3	Degree Major	☑	Short Text Box	Area of Study	3	☐	☑	🗑️ 📄
4	Graduation Date	☑	Date Field	Graduation Date	4	☐	☑	🗑️ 📄

Setup Steps in Cornerstone

Employment fields must be mapped in Succession > Resume in order for Cornerstone to pass the applicant's data to AccurateAce. The name of the field in Cornerstone (as defined in the Field Name field on the Add Field pop-up on the Resume > Previous Positions page) does not need to match the name of the field in AccurateAce, but it must be mapped correctly to the corresponding Applicant Mapping field in your portal in order for the data to pass successfully to AccurateAce.

To map the fields:

1. Navigate to Admin > Tools > Succession Management > Resume.
2. Select the Edit icon in the Previous Positions row.
3. Ensure that Experience is selected in the Applicant Resume dropdown.
4. Configure or create the following fields and select the appropriate mapping option in the Applicant Mapping column:

Field Name in AccurateAce	Select This Option in Dropdown in Applicant Mapping Column	Field Type
Employer Name	Organization	Short Text Box; AccurateAce allows a candidate up to four entry records
Title	Position	Short Text Box; AccurateAce allows a candidate up to four entry records
Start and End Date	Date Range	Date Range Field; AccurateAce allows a candidate up to four entry records

DEFAULT POSITION	NAME	DISPLAY FIELD NAME	TYPE	APPLICANT MAPPING	APPLICANT POSITION	REQUIRED	ACTIVE	OPTIONS
1	Company	<input checked="" type="checkbox"/>	Short Text Box	Organization	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
2	Start and End Date	<input checked="" type="checkbox"/>	Date Range Field	Date Range	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3	Position	<input checked="" type="checkbox"/>	Short Text Box	Position	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Setup Steps in Cornerstone

1. Change the candidate's status to the AccurateAce background check integration status you configured on either the Manage Applicants page or the Applicant Profile page.
2. Under Applicant Profile > Statuses tab, click the Assign to Applicant link.
3. The Select Screening Program Option pop-up will appear where you will select "AccurateAce Background Check" provider in Select Provider then click Submit.
4. The Select Screening Program Option pop-up will appear where you will select "AccurateAce Background Check" provider in Select Provider then click Submit,
5. AccurateAce sends an email to the candidate to collect the remaining required fields. The email will include a link and authentication credentials that the candidate will use to access the AccurateAce system.
6. If the screening request is successful and completed, the following information is displayed on the Applicant Profile page:
 - Assigned - This field displays the date that the background screening was assigned to the candidate.
 - Reference ID - This field displays the package name selected and assigned to

the candidate in AccurateAce.

- Status - This field displays the overall status of the order.
 - If the request is successful, this field displays "Acknowledged."
 - If the request is not successful, this field displays "Error."
 - Once the background check process is started, this field displays "In Progress."
 - Once the background check is finished, this field displays "Completed."
- 7. The results of the background check display in the status panel on the Applicant Profile > Statuses tab. You can also view the results from the associated column on the Manage Applicants page.

Appendix

A. Security Permissions

Permission Name	Permission Description	Category
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Applicants: Initiate Background Check	This permission grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]."	Recruiting
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting
Applicants: View Background Check Status	Allow user to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained.	Recruiting
Applicants: View Background Check Status and Details Lin	This permission allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

Permission Name	Permission Description	Category
Requisition: Owner	<p>Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.</p> <p>Note: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the Requisition: Manage permission overrule those of the Requisition: Owner permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. Note: This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Note: If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the Requisition: Reviewer permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the Requisition: Reviewer permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.</p>	Recruiting

B. Field Listing

The table below lists the fields that Cornerstone sends to AccurateAce when a background check request is submitted.

Field	Notes
Applicant First Name	<ul style="list-style-type: none"> Required field
Applicant Middle Name	
Applicant Last Name	<ul style="list-style-type: none"> Required field
Applicant Email Address	<ul style="list-style-type: none"> Required field
Applicant Suffix	
Applicant Phone	
Applicant Address	<ul style="list-style-type: none"> Applicant's line addresses 1 and 2
Applicant City	
Applicant State	
Applicant Zip/Postal Code	
Division OU ID	<ul style="list-style-type: none"> Mapped to AccurateAce's Client_Code1 Division OU ID associated with the job requisition applicant is applying for
Location OU ID	<ul style="list-style-type: none"> Mapped to AccurateAce's Client_Code2 Location OU ID associated with the job requisition applicant is applying for
Position OU ID	<ul style="list-style-type: none"> Mapped to AccurateAce's Client_Code3 Position OU ID associated with the job requisition applicant is applying for
Cost Center OU ID	<ul style="list-style-type: none"> Mapped to AccurateAce's Client_Code4 Cost Center OU ID associated with the job requisition applicant is applying for
Grade OU ID	<ul style="list-style-type: none"> Mapped to AccurateAce's Client_Code5 Grade OU ID associated with the job requisition applicant is applying for
Job Requisition ID	<ul style="list-style-type: none"> Mapped to AccurateAce's Client_Code6 Job requisition ID associated with the job requisition applicant is applying for

Field	Notes
Recruiter Email Address	<ul style="list-style-type: none"> • Required field • Email address of user logged into Cornerstone and launching the integration
Previous Employer Name	<ul style="list-style-type: none"> • If a candidate has more than 4 employment records, only the latest 4 records are sent to AccurateAce
Previous Position Date Range	<ul style="list-style-type: none"> • If a candidate has more than 4 employment records, only the latest 4 records are sent to AccurateAce
School Name	<ul style="list-style-type: none"> • If a candidate has more than 3 education records, only the latest 3 records are sent to AccurateAce
Degree	<ul style="list-style-type: none"> • If a candidate has more than 4 degree records, only the latest 4 records are sent to AccurateAce
Major	<ul style="list-style-type: none"> • If a candidate has more than 4 degree records, only the latest 4 records are sent to AccurateAce
Graduation Date	<ul style="list-style-type: none"> • If a candidate has more than 4 degree records, only the latest 4 records are sent to AccurateAce • Only month and year are sent to AccurateAce