Background Check Connector

Edge Integration Guide

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Version history

	DATE	AUTHOR	DESCRIPTION
1.0	4/11/2019	Cornerstone PM	Original version
2.0	9/21/2020	Cornerstone PM	Updated version with new ATS functionality

Overview

Cornerstone's Background Check Connector provides organizations the ability for their preferred background check vendor to integrate with Cornerstone. Cornerstone provides the end-to-end workflow information and the toolkit for external developers to build services required to set up the integration.

Enablement

The integration is available from Cornerstone at no additional charge. Howerver, there are three basic requirments:

1. Cornerstone Recruiting
2. Account with a preferred pre-hire assessment provider
3. Provider or 3rd party development team

Only one assessment provider can be integrated in your Cornerstone portal using the connector.

Exceptions

Only one background check vendor can be integrated in your Cornerstone portal using the connector.

Prerequisite setup

1. Have your background check vendor or 3rd party engineering/software development team review the Background Check Connector documentation within the API Explorer.

2. Background check vendor or 3rd party engineering/software development team develops the integration based on the requirements provided in the Background Check Connector documentations.

Getting started

The integration can be self-installed in your CSX Stage or Pilot to support your testing exercise. When ready to move to Production, please reach out to your Cornerstone Client Executive to have the integration installed in your CSX Production portal.

Once enabled in Production by your Cornerstone Client Executive, start at Step 9 after navigating to Admin Tools > Edge > Integrations and selecting the Background Check Connector's Confguration button.

1. Log in to your Cornerstone portal.

2. Navigate to the **Edge Marketplace** (Admin > Tools > Edge > Marketplace).

3. Search for **Background Check Connector** then click on the **Background Check Connector** tile.
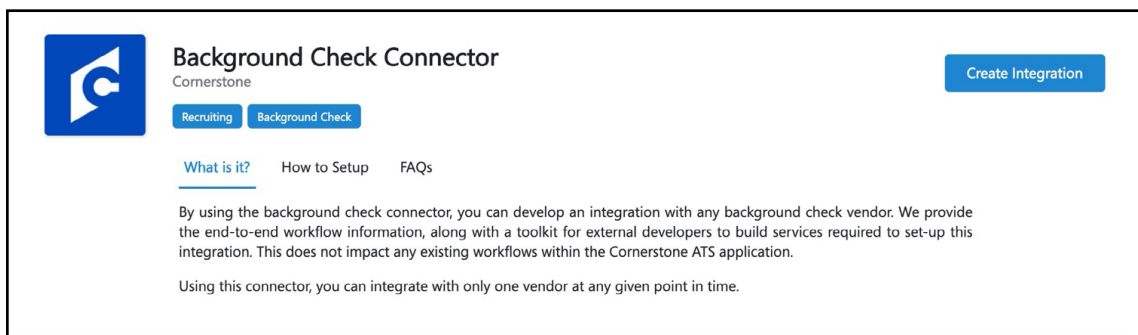
4. Click on **Create Integration**.

5. Review the **Terms and Conditions**, select the checkbox **I have read, understand and agree to the terms and conditions above**, then click **Purchase**.

6. Enter your background check vendor information then click **Submit**.

7. Click on Configure Now. You will then be directed to the **Settings** page.

8. Copy the **Callback Access Key** value by clicking the **Copy** button and provide this to your vendor/ development team. This key will be required by your development team to establish a connection when sending background check status/updates back to Cornerstone.

9. Configure the integration on the **Settings** page.

a. **Username**: This is the username provided by your vendor/development partner to authenticate the request from Cornerstone Recruiting to the background check vendor.

b. **Password**: This is the password for the username provided by your vendor/ development partner to authenticate the request from Cornerstone Recruiting to the background check vendor.

c. **Base URL**: This is the base URL endpoint for all the background check webhooks. This is provided by your vendor/development team.

d. **Validity Period Set-up**: This table allows you to specify the validity period for a background check package. This feature could save your organization time and money with the ability to set a specified period for which background checks are valid, so that candidates applying to multiple jobs only need to complete screenings initially and upon expiration. Once enabled, background check results are displayed on the Manage Applicants page and the Applicant Profile in Cornerstone Recruiting during the validity period across all non-closed requisitions for the candidate. Cornerstone Recruiting will prevent recruiters from triggering additional background check requests for the same package while an existing background check is valid.

- To add a validity period for a background check package, click on **+ Add New Validity Period Set up**.

- Enter the package ID under the **Background Check Package ID** field. You will need to obtain the package ID from your background check vendor. This is the same background check package ID that a vendor would pass back to Cornerstone when Cornerstone requests for the list of packages from the vendor as part of the connector workflow.

- Enter the number of days a background check result will be valid for in the **Validity Period (Number of Days)** field. A validity period can be entered for each background check package ID.

- Turn on the **Enable Validity Period** toggle for the record you just added. Alternatively, you can turn on the **Enable Validity Periods for all Background Check Packages** toggle to enable the validity period for all background check packages entered in the table.

- Click on the trash icon to delete a validity period set-up.

- Note the following:

  - Validity period end date for each background check order will not be calculated until the result is returned from the background check vendor.

  - Cornerstone will not calculate a validity period for an "In Progress" background check order. However, if validity period is configured, a recruiter will be prevented from triggering another background check request when an existing background check is in "In Progress". This is true if an applicant is applying to another requisition but assigned to the same background check package.

  - Background check package not configured in the Validity Period Set-up table will be treated as if the package does not have any validity period, i.e. validity period = 0 days. For example, if you have 3 background check packages with your vendor but only 2 are set up to have validity period, then the third package will default to a validity period of zero days.

  - If you deactivate a validity period for a package, all results after deactivation

will no longer have a validity period. All background checks for the package ID that were assigned prior to deactivation will still display the validity period expiration, but recruiters will no longer be prevented from triggering a background check. Once a new background check has been triggered for that applicant, following the deactivation, the results will no longer apply across requisitions.

- When a change is made to a validity period in Edge, it is going forward, not retroactive. If a background check result is not returned yet, the new validity period would apply. Prior background check results will not be recalculated based on the new validity period.

- As part of the integration, vendors can send back a results URL to Cornerstone which is displayed in the Manage Applications page in Cornerstone Recruiting. Typically, vendors set a predefined expiry duration for the results link. It is up to you to ensure that the validity period you set for a background check does not expire after the expiry period for the vendor results link.

e. **Field Configuration**: This is the list of available fields that Cornerstone may send to your background check vendor when a background screening request is assigned to an applicant. Select the fields by turning on the toggle switch. Share the list of selected fields to your vendor/ development partner to inform them of the fields to expect in the background check order request. See [Appendix B: Field Mapping for field description](#).

- Note the following:
  - The fields below are required and will always be selected. They cannot be unselected.
   All other fields are optional.

a. Background Check Data > Background Check Package ID

b. Background Check Data > Recruiter Email

c. Applicant Data > Applicant First Name

d. Applicant Data > Applicant Last Name

- Your vendor/development partner must be notified BEORE making any changes to the selected fields to ensure that the integration does not break. This will allow them to make the necessary changes on their side, if needed.

10. Click on **Save Settings** which will take you to the **Manage Integrations** page.

11. Search for **Background Check Connector** integration and enable the integration by turning on the toggle switch.

Cornerstone Recruiting configuration

Organizations can immediately trigger background check packages, after the background check has been configured in Edge, on the Manage Candidates page. However, if you'd like to configure the integration to be automatically assigned to a candidate at the time of entering a status or to launch integrations from the Applicant Profile by creating a Custom Integration status, please see optional steps below.

OPTIONAL – Configuring Automated Candidate Progression

1. Navigate to **Requisition Templates**

2. Go to **Feature Activation Preferences** and self-enable the **Auto-Assignment, Auto-Progression, and Auto-Disposition** functionality.

3. Go to a **Requisition Template** or the **Default Requisition** template and configure the Auto-Trigger Pre-Employment Verification section in the **Status list** on the **General tab**. This section lets you select pre-employment verifications (i.e., background checks) for statuses.
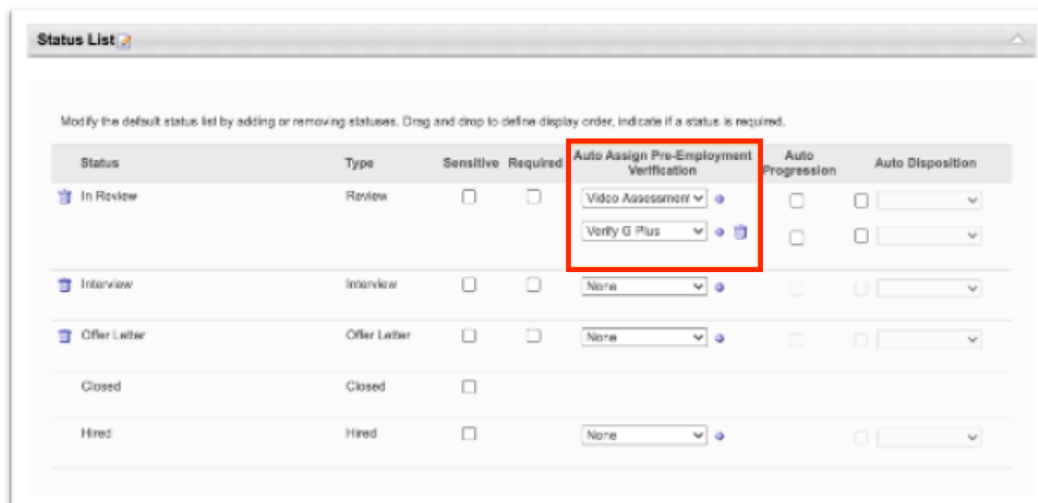
4. Create a requisition using that requisition template.

5. When candidate is moved to the appropriate status, the pre-employment verification will be automatically assigned.

OPTIONAL – Creating a Custom Integration

Administrators can create a new custom applicant status to be used for the background check integration. This will be enforced on the Manage Applicants and Applicant Status page.

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.

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.

   - **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** - Ensure the field is checked before saving the status so that the status is active for the portal.

4. Save the custom applicant status.

5. Add the custom applicant status to a job requisition template. Then, create a requisition using this requisition template.

Assign background check

There are four methods to assigning applicants a pre-employment background check:

A. Manage Candidates

B. Manage Applicants

C. Applicant Profile – applicant can be assigned to a background check on-demand from the Applicant Profile page under the Statuses tab.

D. Automated Candidate Progression – applicants can be automatically assigned once they enter a specific status.

A. Manage Candidates

To assign a background check from the Manage Candidates page:

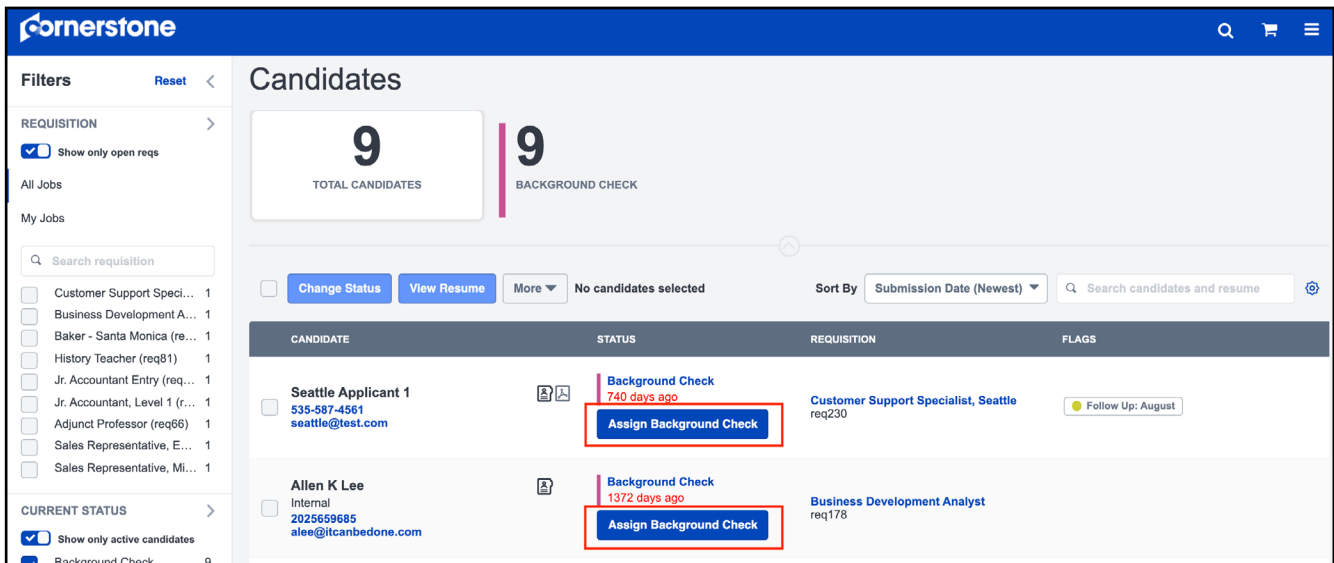Bulk and single assign from the "More" Actions Dropdown

1. Select the candidates to which you'd like to assign the background check
2. Click Assign Integration under the More dropdown
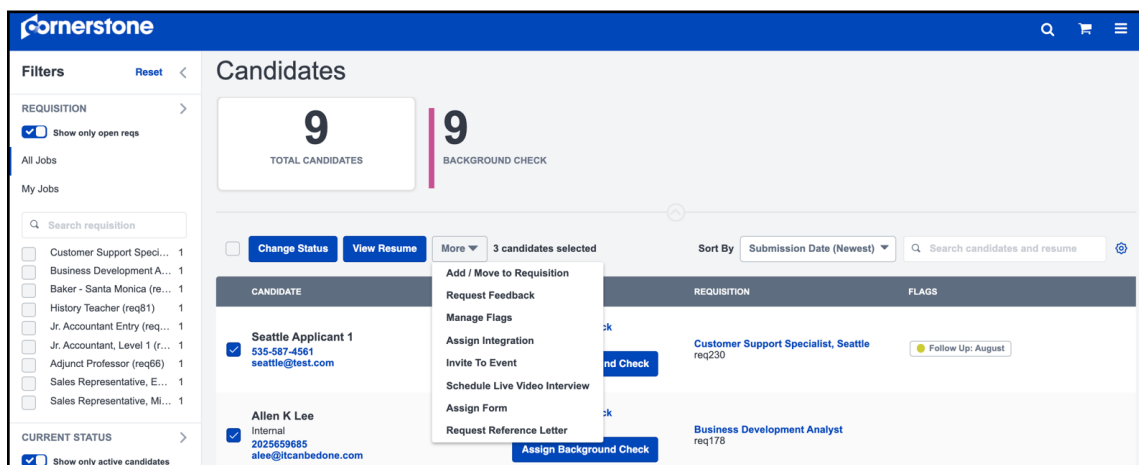
3. Select the Provider and the Package for the integration assignment

Assign from the "Suggested Actions" Dropdown
1. Filter the candidates to the **Background Check** status on the filter on the left side of the page
2. Click **Assign Background Check** under the status of the applicant
   a. Note: This only appears if one of the following conditions is met:
      i. Status is: Custom Integration (Background Check)
         1. If integration (Background Check) has not been launched, you will see Assign Background Check

2. If the background check is complete, you will see View Results
3. This will take you to the Applicant Profile. See section C for more information in assigning the background check on the Applicant Profile

B. Manage Applicants

This option is only available if the Automated Candidate Progression is enabled through Admin > Tools > Recruit > Feature Activation Preferences.

Bulk and single assign from the "Actions" Actions Dropdown

1. Select the candidates to which you'd like to assign the background check

2. Click **Assign Integration** under the Actions dropdown and select the **Provider** and **Package**
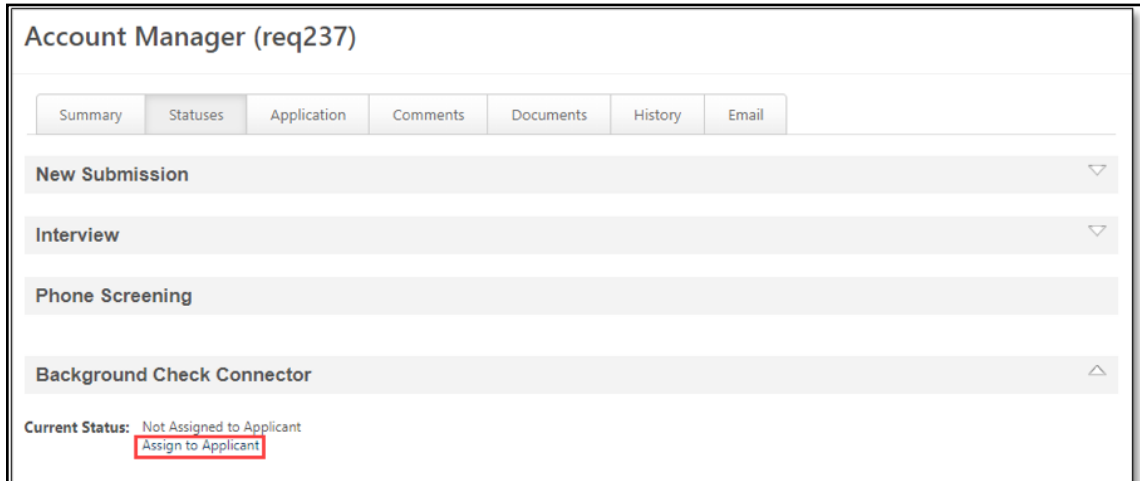
C. Applicant Profile

To assign a background check from the Applicant Profile:

1. Change the applicant's status to the background check integration status you have configured.

2. Under Applicant Profile > Statuses tab, click on the **Assign to Applicant** link.

3. The **Select Screening Program Option** pop-up window will appear where you will select the background check package to assign to the applicant.

4. Click **Submit**.

D. Automated Candidate Progression

If the requisition is configured to support auto-assignment, the applicant will be automatically assigned a background check request upon entering a specific status.

The results of the background check can also automatically progress or disposition an applicant. To use this feature, the background check vendor must be able to pass either of the following values in the callback field AutoProgessEligibility: progress, review or dispose.

- If a requisition is configured for auto-progression, "progress" will trigger the auto-progression workflow. "review" will not advance the applicant and requires the recruiter to evaluate the background check results and manually progress or dispose the applicant.

- If a requisition is configured for auto-disposition, "dispose" will trigger the auto-disposition workflow. "review" will not dispose the applicant and requires the recruiter to evaluate results and manually progress or dispose of the applicant.

- If no value is provided, behavior will be similar to "review".

To enable and configure the Automated Candidate Progression feature, please see Online Help (Activate Auto-Assignment, Auto-Progression, and Auto-Disposition).

View background check results

A. Manage Candidates

1. Once the Results of a Background Check have been received by CSOD, you will see the status on the **Manage Candidates** page in the column for that background check package.

2. When you click on that status you will be directed to the vendor's results page for that candidate

B. Manage Applicants

1. Once the Results of a Background Check have been received by CSOD, you will see the status on the **Manage Applicants** page in the column for that background check package.

2. If the results are based on another requisition within a validity period for that integration, you will see it listed in that column

C. Applicant Profile

A high-level summary of the background check results is available on the Manage Applicants page and the Applicant Profile > Statuses tab. The following information are available on the Application tab (and the Statuses tab, if the background check was configured as a Custom Integration Status:

- **Assigned** - date of when the background check request is assigned to the applicant
- **Reference ID** - an auto-generated Cornerstone unique identifier
- **Status** - status of the background check request; possible values are "Completed", "In Progress", "Cancelled", and "Unknown"
- **Background Check Package Name** - name of background check package assigned to the applicant
- **Provider Reference ID** - background check vendor's unique identifier for each screening request
- **Status** - status of the background check request; possible values are "Completed", "In Progress", "Cancelled", and "Unknown"
- **Result** - additional details of the applicant's background check results
- **View Report** - link that will direct the recruiter/hiring manager to the background check vendor's site for a more detailed report of the applicant's background check results

Appendix

A. Security Permissions

PERMISSION NAME	PERMISSION DESCRIPTION
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.
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]."
Applicants: View Background Check Status	This permission allows users to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained.
Applicants: View Background Check Status and Details Link	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.
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.

PERMISSION NAME	PERMISSION DESCRIPTION
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.
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.
Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership
Requisition: Owner	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. 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.

PERMISSION NAME	PERMISSION DESCRIPTION
Requisition: Reviewer	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.

B. Field Mapping

To assign the assessment to applicants during the application process, the assessment can be added to a step within the Application Workflow.

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
1	Background Check Data	Package ID	• Vendor-provided ID of the background check package assigned to the candidate • Required field • Toggle switch on the Settings page is enabled and grayed-out by default
2	Background Check Data	Recruiter Email	• Email address of the job requisition's primary owner • Field is required • Toggle switch on the Settings page is enabled and grayed-out by default
3	Applicant Data	Applicant First Name	• First name of applicant assigned to a background check • Field is required • Toggle switch on the Settings page is enabled and grayed-out by default
4	Applicant Data	Applicant Last Name	• Last name of applicant assigned to a background check • Field is required • Toggle switch on the Settings page is enabled and grayed-out by default
5	Applicant Data	Applicant Middle Name	• Middle name of applicant assigned to a background check
6	Applicant Data	Applicant Prefix	• Prefix of applicant assigned to a background check

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
7	Applicant Data	Applicant Suffix	• Suffix of applicant assigned to a background check
8	Applicant Contact Information	Applicant Email	• Email address of applicant
9	Applicant Contact Information	Applicant Phone	• Phone number of applicant
10	Applicant Contact Information	Applicant Home Phone	Home phone number of applicant
11	Applicant Contact Information	Applicant Mobile Phone	Mobile phone number of applicant
12	Applicant Address Information	Applicant Address Line 1	Address line 1 of applicant
13	Applicant Address Information	Applicant Address Line 2	Address line 2 of applicant
14	Applicant Address Information	Applicant Address City	Address city of applicant
15	Applicant Address Information	Applicant Address State	Address state of applicant
16	Applicant Address Information	Applicant Postal Zip Code	Address postal/zip code of applicant
17	Applicant Address Information	Applicant Country	Address country code of applicant
18	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences Position	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = Position

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
19	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences Organization	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = Organization
20	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences Description	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = Description
21	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences Start Date	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = Start Date
22	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences End Date	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = End Date
23	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences Current	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = Current
24	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Professional Experiences Date Range	Applicant's resume data mapped to Applicant Resume = Experience and Applicant Mapping = Date Range
25	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Educations Area Of Study	Applicant's resume data mapped to Applicant Resume = Education and Applicant Mapping = Area of Study
26	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Educations Minor	Applicant's resume data mapped to Applicant Resume = Education and Applicant Mapping = Minor

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
27	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Educations Institution	Applicant's resume data mapped to Applicant Resume = Education and Applicant Mapping = Institution
28	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Educations Degree	Applicant's resume data mapped to Applicant Resume = Education and Applicant Mapping = Degree
29	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Educations Grade	Applicant's resume data mapped to Applicant Resume = Education and Applicant Mapping = Grade
30	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Educations Graduation Date	Applicant's resume data mapped to Applicant Resume = Education and Applicant Mapping = Graduation Date
31	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Certifications Name	Applicant's resume data mapped to Applicant Resume = Certifications/ Licenses and Applicant Mapping = Name
32	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Certifications Issued Date	Applicant's resume data mapped to Applicant Resume = Certifications/ Licenses and Applicant Mapping = Issued Date
33	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Certifications Expiration Date	Applicant's resume data mapped to Applicant Resume = Certifications/ Licenses and Applicant Mapping = Expiration Date
34	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Certifications Description	Applicant's resume data mapped to Applicant Resume = Certifications/ Licenses and Applicant Mapping = Description

ITEM #	SECTION	FIELD LABEL	FIELD DESCRIPTION
35	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Job Requisition ID	Job requisition ID applicant is applying forw
36	Applicant Resume Data *Note: All Resume fields are configured in Admin > Tools > Succession Management > Resume*	Job Requisition Display Job Title	Job requisition display job title