# **Smart**Recruiters

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Vero and SmartRecruiters integration user guide

2023-06-06

## Key features of the integration

The integration will allows users of the SmartRecruiters platform to use Veroscreening Ltd as a background check supplier and commission background checks from within the SmartRecruiters platform.

Having an integration will save time by reducing manual data entry and the need to switch into a separate screening platform. It further reduces the risk of error as the exact data within your systems will be transferred automatically.

Integrations can also be used to improve workflow process. For example, where Candidates must be fully screened before being allowed on site, the integration can trigger the system to move the onboarding process to the next stage.

When the SmartRecruiters user selects a Vero package from the Vero integration the candidate is registered with Vero Screening and an email is sent with a link to their online screening form. When the form has been completed, Vero will process the background checks. The status of the screening will be pushed back to SmartRecruiters for users to keep track of progress. When the background check has been completed Vero will push a link for the user to view the screening result within the VeroLive portal.

The integration allows Smart Recruiters customers to request and initiate preemployment screening by simply moving through the onboarding process. Additionally, the Recruiter can see the status and outcome of the screening from within Smart Recruiters platform

# Step-by-step instructions on how to setup the integration

To get started you must first be setup as a Vero Screening client before connecting the integration. Please contact <u>intouch@veroscreening.com</u> or call 01273 203 090 if you do not hold an existing account with us. Our team will talk you through our services and next steps.

Once set up, or if you already have an account with us, please follow these steps:

 Contact Smart Recruiters on <u>support@smartrecruiters.com</u> to request your CompanyID. 2. Once you've received your CompanyID, please share this with your appointed Client Relationship Manager who will arrange to insert this number into our connection approval process.

Once completed, to enable an integration with Vero Screening you should follow these steps.

- 3. From within Smart Recruiters, the Admin user should:
  - a) Navigate to the SmartRecruiters settings page

Corporate					
Company Settings					
Administration	Career Page Setup				
Edit company info, manage roles, and support contracts.	Display jobs on company website and on social networks.				
Company Profile	Career Pages & Job Ad				
Security Settings	Job Widget				
All-Company Email Settings	Job Alerts				
Candidate Experience Email Settings	Job Ad Footer				
Global Compliance					
Job Location Precision					
Apps & Integrations					

b) Select the Apps & Integrations link

< Settings	Apps & Integrations	
APPS & INTEGRATIONS	CREDENTIALS	
APPLICATION		ACTIVE

c) Scroll down and select the Vero application



Vervoe Integration

#### d) Select the connect button

< Apps & Integrations	Vero Screening Integration	
VETO		Connect
We're Pre-Employment Screening Experts.		
Before you enable the connection, please e	nsure you have an Vero Screening account	

e) Read the description of service and on the next page select 'allow and continue'

< Apps	& Integrations	Vero Screening Integration	1	
Ve We're Pre-	Employment Screening Experts.			
Vero Scree	ning requires the following information	1:		
💄 Car	ndidate information			>
📄 Job	information			>
🚠 Org	ganization information			>
Vero Scree	ning will use the above information to:			
💄 Ge	nerate Assessment Package Selection			>
Pro	ocess Assessments			>
📥 Dis	tribute Assessment to Candidates			>
			Allow and continue	Cancel

Vero have an approval / authentication stage to accept you onto the integration. During this time, we will perform internal checks of your account and any configuration required and share a temporary username and password.

You will be notified once the integration has been accepted via Smart Recruiters and the integration will be shown as 'Connected'

f) You are redirected to Vero to login with your temporary username and password

Vero.	Vero Authentication Gateway
Please userna	enter your temporary ame and password
Usernam	e
Password	j
Log in	

g) When you have completed login you should be redirected back to SmartRecruiters and your integration should be connected and enabled



h) If the connection fails, you will see an error page containing an error message indicating what the nature of the error is

After you enabled the integration, every user who has permission to order assessment can now order and view assessment results; you can also configure the assessment partner's assessment packages in hiring step.

## Integration workflow

### Initiating a screening

- 1. User triggers the Vero assessment order from SmartRecruiters candidate profile
  - a. User selects 'Browse' on the Assessments panel



b. The package list is displayed



c. User selects the relevant package associated to the role hiring by checking a box and the 'Continue' button

VEID	Australia - Human Resources Australia - Temp to Perm Australia - Human Resources Australia - Temp to Perm [CCHAU11]	
Verd	Australia - Business Services Australia - Temp to Perm Australia - Business Services Australia - Temp to Perm [CCHAU5]	

d. User places the assessment order by selecting the 'Send' button



- 2. The Candidate will receive the online questionnaire invitation email from Vero detailed progress can be tracked within VeroLive
- 3. The Candidate completes the online questionnaire
- 4. Once the online questionnaire is completed, the background screening will be processed by Vero
- During the background check process, status updates will be sent to SmartRecruiters and will be visible on the candidate page under the assessments panel



6. When the background check has been completed the check status will change to either 'Clear' or 'Requires review' and a link will be available which will navigate the user to the background check report hosted within Veros Client Portal.

Assessments		BROWSE
PREFERRED	MARKETPLACE	
<ul> <li>Brighton ARI</li> <li>Checks comp</li> </ul>	<b>M Basic</b> lete   Clear	

### **Hiring Process Configuration**

To configure assessment against a hiring step, follow the steps below:

1. Navigate to Settings / Admin page and click Hiring Process under Configuration

2. Choose the hiring step that you would like assessment to be order on when candidate applications entered the step, click on the step and then click **Assessments** 

· second	s		Cu	ustom Hiring Process		
						+ New Hiring Proce
Default hir	ing process					🖌 Edit
NEW	IN-REVIEW		INTERVIEW	OFFERED	ONBOARDING	
+2 NEW	SKILLS TEST ASSI	TEST SNMENT	SKULLS TEST	BACKGROU_ OHECK PENDING	OFFER ACCEPTED	
Add in-line This hiring pr	assessment rocess applies to all jobs b	y default. You can c	onfigure special processes for jobs r	Assessments     Notifications matching sectores concerned on the sectores of the sectores	e". Use 'ORG FIELDS' to manage hiring process	es configuration.
						🖌 Edit
Ewa's hirin	g process			OFFERED	ONBOARDING	
Ewa's hirin	IN-REVIEW		INTERVIEW	OTTOLD		

- 3. Select the Preferred tab
- 4. Search Vero Screening in the 'Vendors'

#### 5. Click CONFIGURE



6. Check the box next to the assessment to configure the assessment against the hiring step and click SAVE. You may use the search bar and filters at the top to quickly find the assessment you are looking for.

		Vendors: Vero Screening *	Туре
Search	Q. CAT	NCEL	
VENDOR	ASSESSMENT DETAILS	ACTIVE	
CERA	Australia (NEW) Australia Level 1		
CEY	Brighton ARM French		
EEV	Brighton ARM Social Media Only		
EEV	Brighton ARM Basic	<b>M</b>	
EEV	Brighton ARM Enhanced voluntary		
VED	Brighton ARM Legal		

7. Toggle on switch if the assessment is to be automatically ordered once candidate applications have entered the hiring step.

ינ ם <mark>(S</mark>	DBS COMMUNITIES	S PEOPLE	ANALYTICS	Search	
← back Configure	Assessments f	or Backgro	Assessments saved You have successfully saved assessments for step configuration.	×	
Pre-set the as	Marketplace	ailable for your	users to choose from for candidates when candidate moved into the 'Backgro	ound Check' hiring step.	
	-				Vendors: All -
		Search		CONFIGURE	
		VENDOR	ASSESSMENT DETAILS	AUTO-TRIGGERED	
		VEI	Australia (NEW) Australia Level 1		
		TEN	Brighton ARM French		

## **Customisation in Custom Fields**

There are a few fields that Vero may require for some Clients to be configured in 'Candidate Fields'. These are the fields you would have typically answered on VeroLive Candidate registration page.

Start Date (standard candidate field) Label: 'Start Date' Location: Candidate Profile > 'Application fields' section Type: Date picker When needed: Optional - Only required if Vero need to know and refer to the Candidates start date

#### Cost Center Number (custom candidate field)

Label: 'Cost Center Code' Location: Candidate Profile . 'Application fields' section Type: Free 'Single-Select' or 'Free Text' (max length 30 characters) When needed: Optional - Only required if you require cost center numbers for invoicing purposes

#### Require Practicing Certificate (custom candidate field)

Label: 'Require Practicing Certificate' Location: Candidate Profile . 'Application fields' section Type: 'Single-Select' or 'Yes/No' When needed: Applicable to Legal sector Clients only for packages where Vero are performing a Legal Regulatory Body Check

#### CV

Label: N/A

The integration supports the submission of the Candidates resume with the assessment order. If a background check requires a CV comparison this can be downloaded from Smart Recruiters when the assessment order is placed.

Vero Screening will be required to mark the registration field 'You must attach the Candidates CV' as mandatory on their back office to receive this document.

## **Integration Requirements**

Job details must include location data and if the job location is in the United Kingdom a postcode for that location must be specified.

## **Tips for a successful integration**

- Users in SmartRecruiters must be set up in Vero's VeroLive system with the same personal corporate email address or a shared corporate email address to be capable of initiating a screening and viewing results
- Users must have the correct permissions setup in VeroLive groups to view the screenings associated from within SmartRecruiters. If users do not have access, they will not be able to log in to VeroLive to view the screening report.

## **Error handling procedures**

There are two types of errors that may be seen in SmartRecruiters UI. Should these errors arise, the user should contact the support team support for further investigation and error fixing.

1. When displaying the list of packages:



No assessments packages available

If this error comes up still after reloading, it most likely indicates an issue with the integration connection/authorization.

#### 2. When making a check order:



This error comes up when an unauthorized user wants to order a check (the user does not exist on the VeroLive account or exists under a different email address).

## **Support contact**

In the event you require support with the integration or have any questions or issues please contact your appointed Client Relationship Manager at Vero Screening in the first instance who will escalate to the technical team where required.