SmartRecruiters

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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 pre-employment 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 intouch@veroscreening.com 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:

1. Contact Smart Recruiters on support@smartrecruiters.com 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.
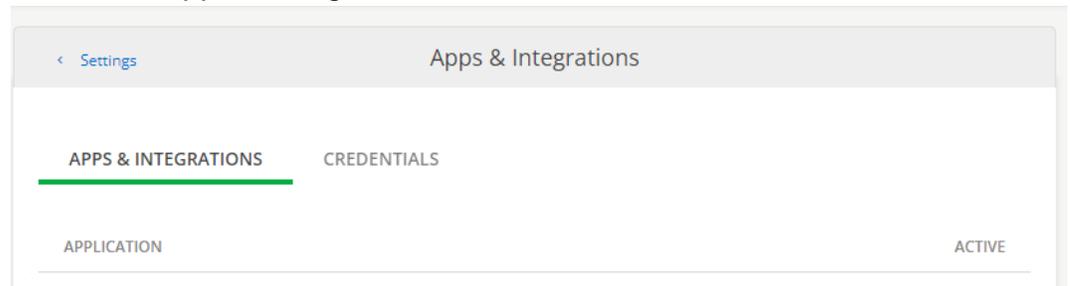
Once completed, to enable an integration with Vero Screening you should follow these steps.

3. From within Smart Recruiters, the Admin user should:
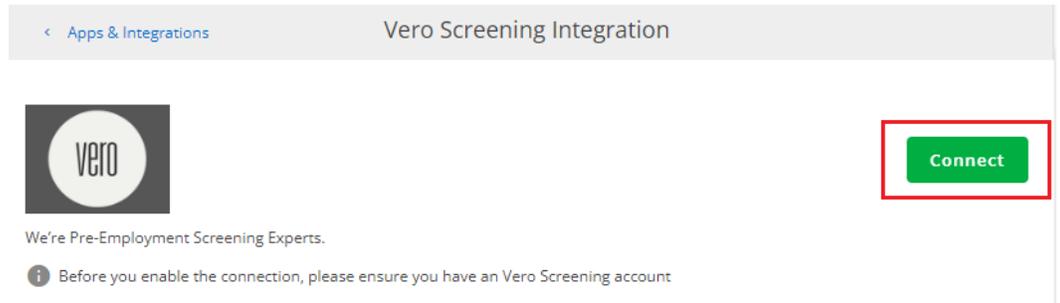
   a) Navigate to the SmartRecruiters settings page
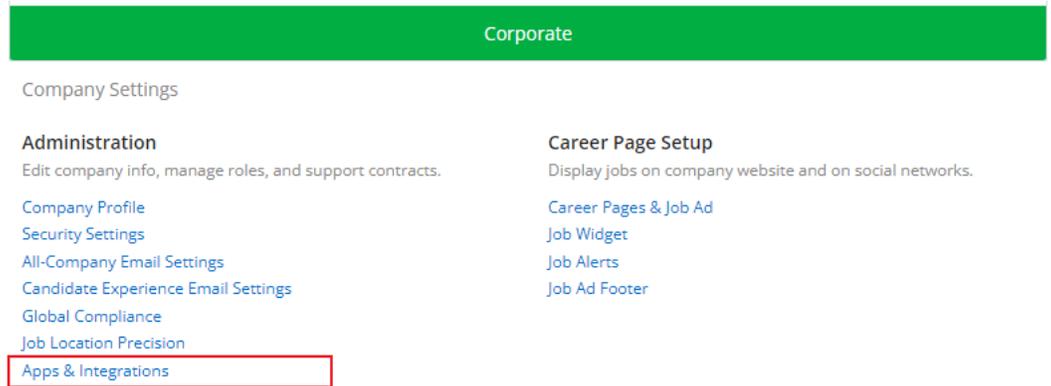
   b) Select the Apps & Integrations link

   c) Scroll down and select the Vero application

d) Select the connect button

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

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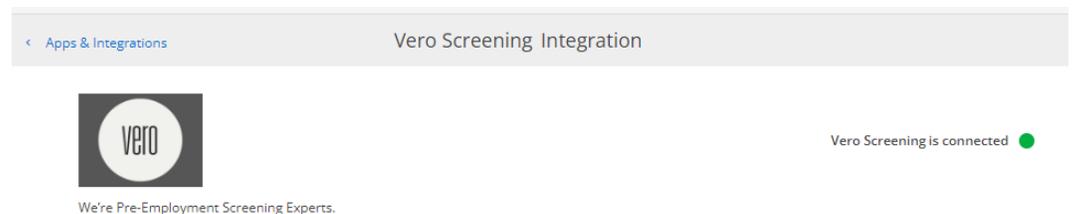
You will be notified once the integration has been accepted via Smart Recruiters and the integration will be shown as 'Connected'

  f) You are redirected to Vero to login with your temporary username and password
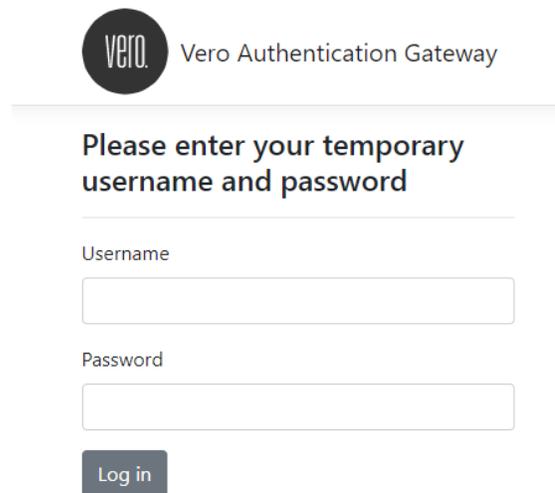
  g) When you have completed login you should be redirected back to SmartRecruiters and your integration should be connected and enabled


  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.
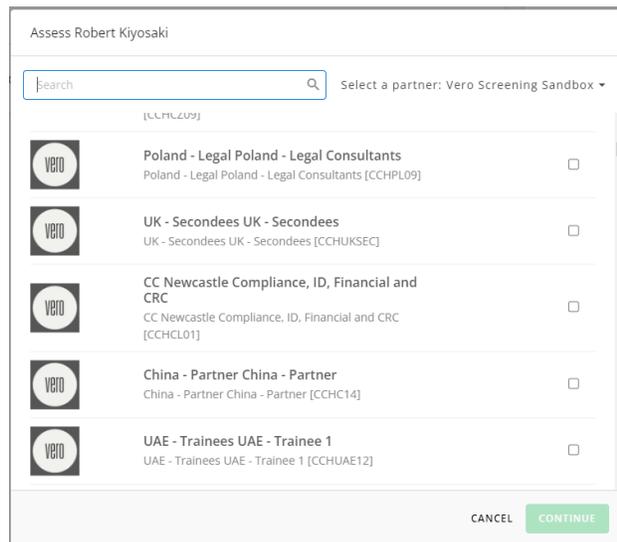
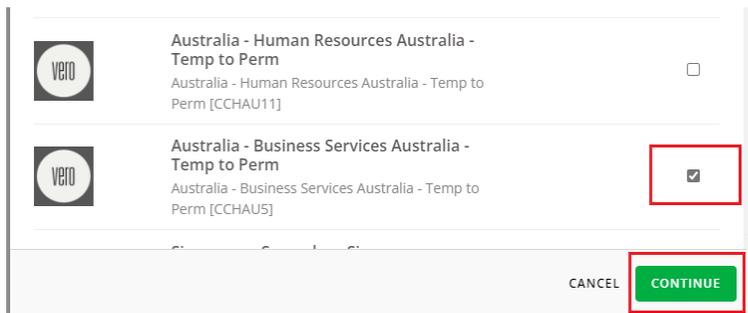# Integration workflow

Initiating a screening

1. User triggers the Vero assessment order from SmartRecruiters candidate profile

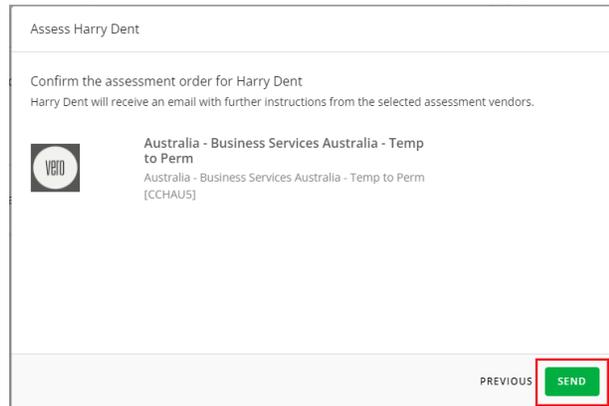   a. User selects 'Browse' on the Assessments panel
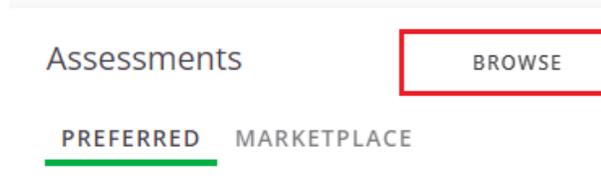

   b. The package list is displayed

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


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

5. During the background check process, status updates will be sent to SmartRecruiters and will be visible on the candidate page under the assessments panel
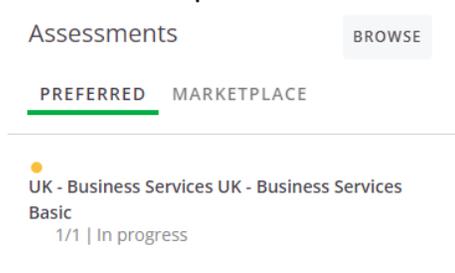

6. When the background check has been completed the check status will change to either 'Clear' or 'Requires review' and a link will be available which will navigate the user to the background check report hosted within Veros Client Portal.
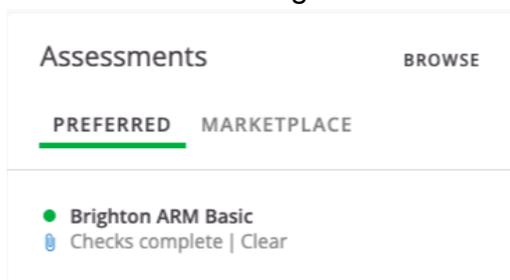
Hiring Process Configuration

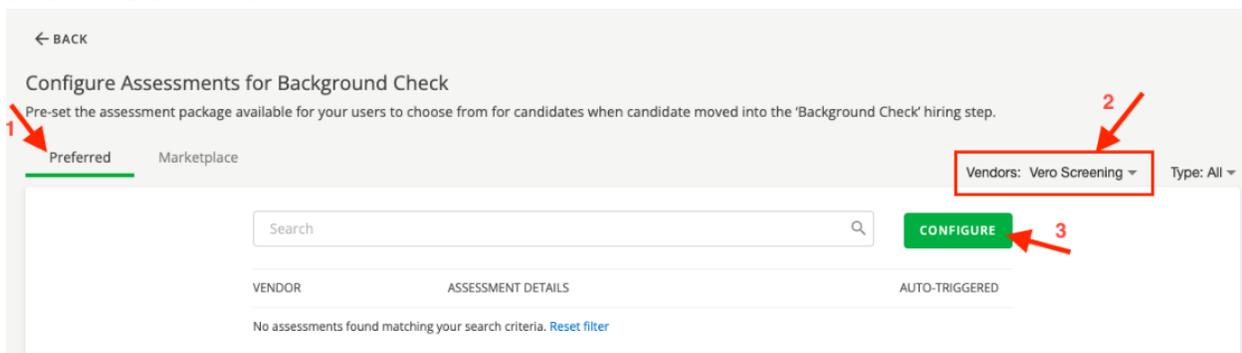To configure assessment against a hiring step, follow the steps below:

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**
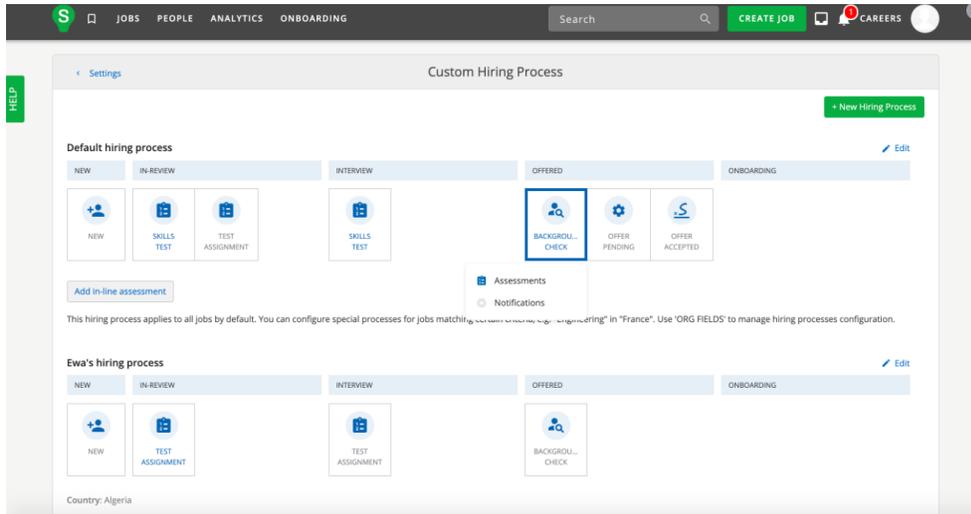
3. Select the Preferred tab

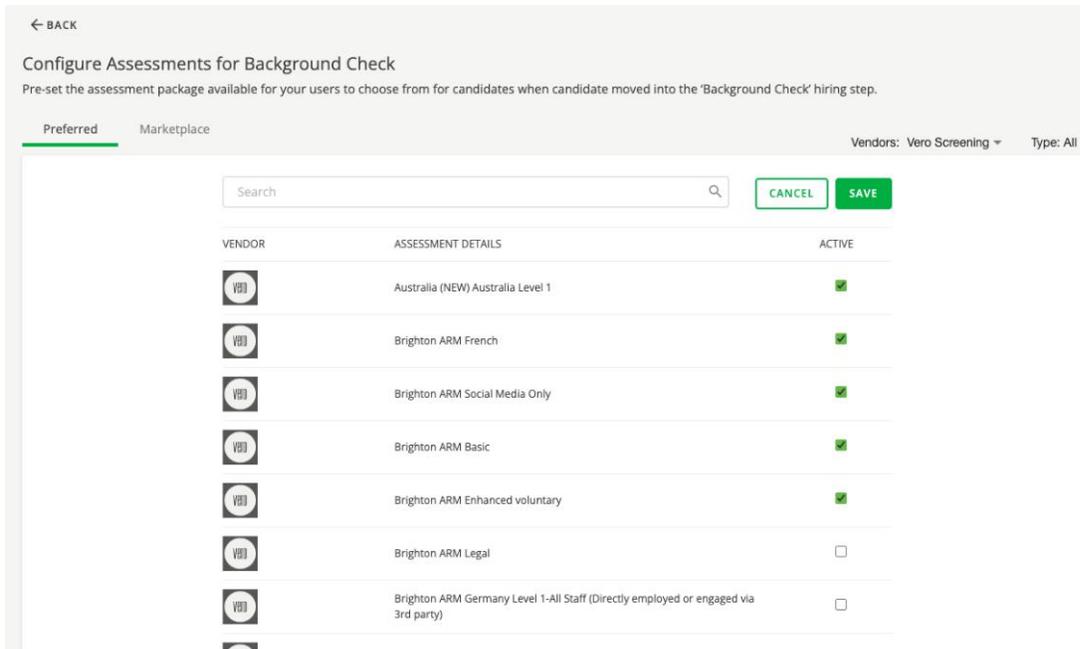4. Search Vero Screening in the 'Vendors'

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.

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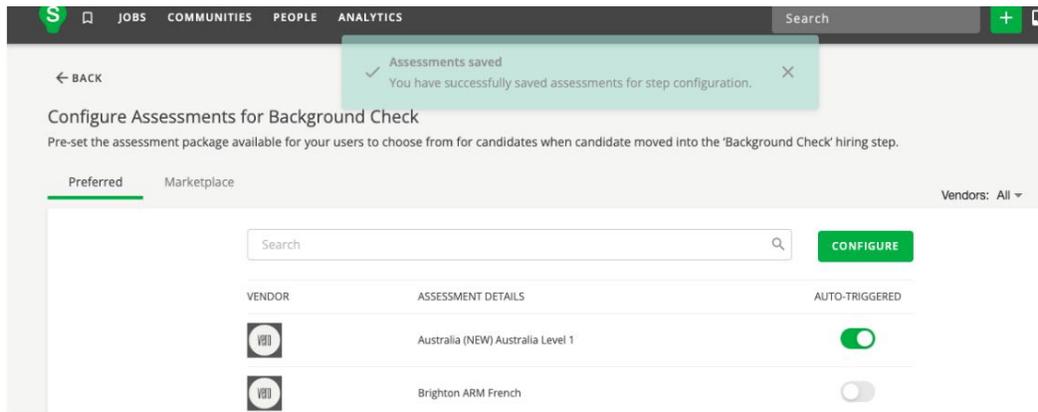
Customisation in Custom Fields

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.
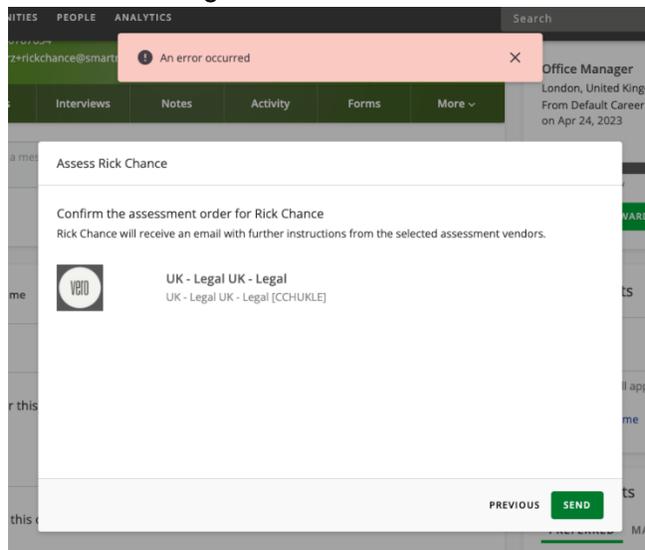
1. When displaying the list of packages:
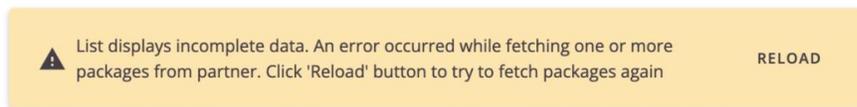
If this error comes up still after reloading, it most likely indicates an issue with the integration connection/authorization.

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.