

SmartRecruiters

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AccurateAccel and SmartRecruiters Integration User Guide

4/15/2024

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Revision History

Date	Version	Author	Description
April 2024	1.0	Anthony Huerta	First Version
April 2024	1.1	Jake Gianassi	Document cleanup

Key features of the integration

The purpose of the AccurateAccel/SmartRecruiters integration allows users to submit requests for background investigations and view status/result information from within the SmartRecruiters user interface. The AccurateAccel/SmartRecruiters integration supports a bi-directional flow of real-time background check requests from SmartRecruiters to AccurateAccel and background check status updates and results in return. The AccurateAccel/SmartRecruiters increases efficiency by eliminating the need to navigate through two separate interfaces to trigger the background investigation and to view status/result information and also removes the need for the recruiter and/or candidate to re-key specific information relevant to the background investigation that has already been collected.

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

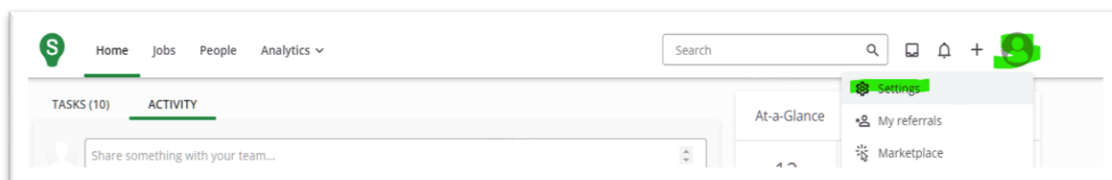
Integration configuration and enablement in AccurateAccel platform

To be configured and completed by the Accurate Integration Support Professional prior to the initial integration handshake:

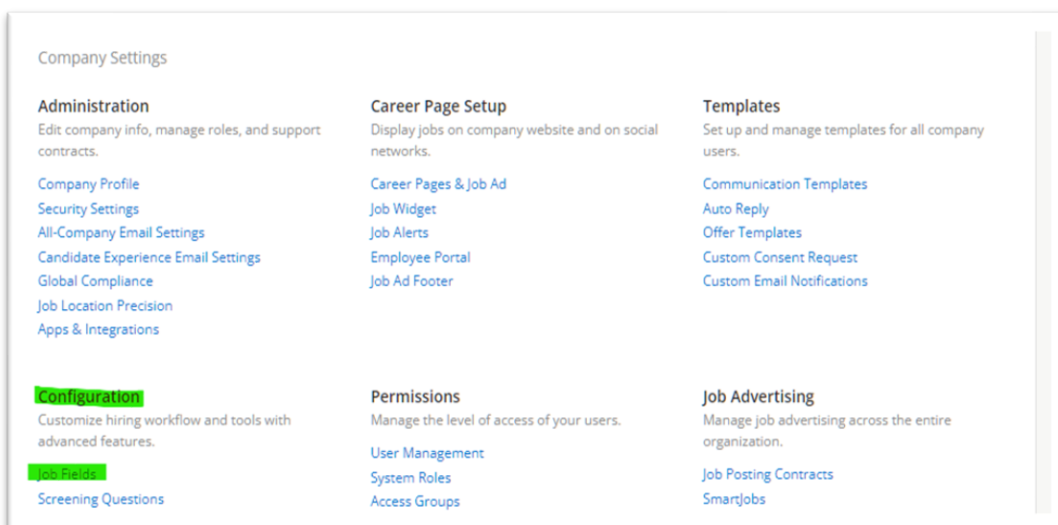
1. Create client credentials in Identity Server. Credentials to be used to retrieve SmartRecruiters customer level credentials
2. Insert new record into Accurate ATS_Request database table (this adds customer to Accurate Accel's SmartRecruiters integration)
3. Insert new record into Accurate Server_Connection_Attribute database table to store authentication details in an encrypted manner

Integration setup and enablement in SmartRecruiters platform

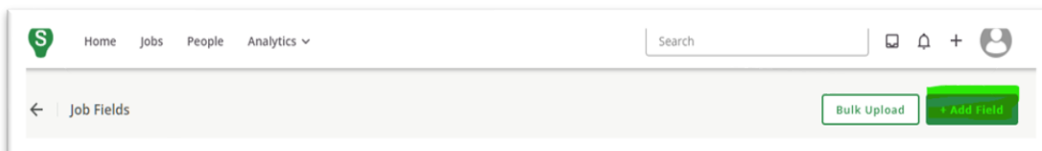
- 1) Pre-Integration Client Configuration
 - a. Create custom job fields—Accurate billing codes. Create 'Business Group' and/or 'Division' as new Job Fields that will be used as part of the Job requisition. These optional fields will be mapped to the Accurate billing code 1 and 2 fields to be used for reporting and/or invoicing.
 - i. Upon logging in as client user – select 'Settings'



ii. Under the 'Configuration' Section → Select 'Job Fields'



iii. Select 'Add Field'



Create Job Field with the following information:

- Name: Business Group or Division
- Type: Single select
- Field Category: Org
- Visibility: Public
- Required field: No
- Where does this field appear?: Job/Job Approval

Field information

Name*

Business Group

Type

Single select

Field Category

Org

Visibility

Public

☐ Required field

Where does this field appear?

☒ Job

☐ Job Ad ⓘ

☒ Job Approval ⓘ

Field information

Name*

Division

Type

Single select

Field Category

Org

Visibility

Public

☐ Required field

Where does this field appear?

☒ Job

☐ Job Ad ⓘ
☒ Job Approval ⓘ

iv. Select 'Save'

b. Add all Business Group or Division Job Field values

i. Values can be added manually one at a time or as a batch via CSV file.

Field values

ACTIVE VALUES
ARCHIVE VALUES

Search value

☐ Show only pending values

Upload CSV

Value name

+ Add

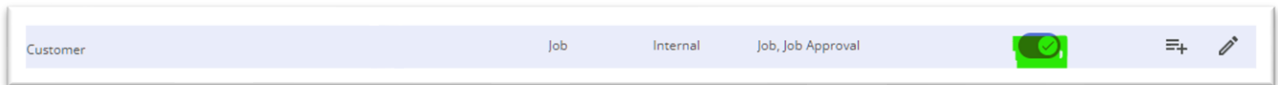
Showing 9 of 9 active values

Value name	Modification Date	
DIV01	Sep 27, 2018	
DIV02	Sep 27, 2018	
DIV03	Sep 27, 2018	

ii. Select 'Save'

c. Set the customer Job Field(s) as active

- i. In 'Job Fields' screen, 'activate' the new custom job field for use in the Job Requisition (if this is not completed, this custom job field will not be available in the job detail section for use)



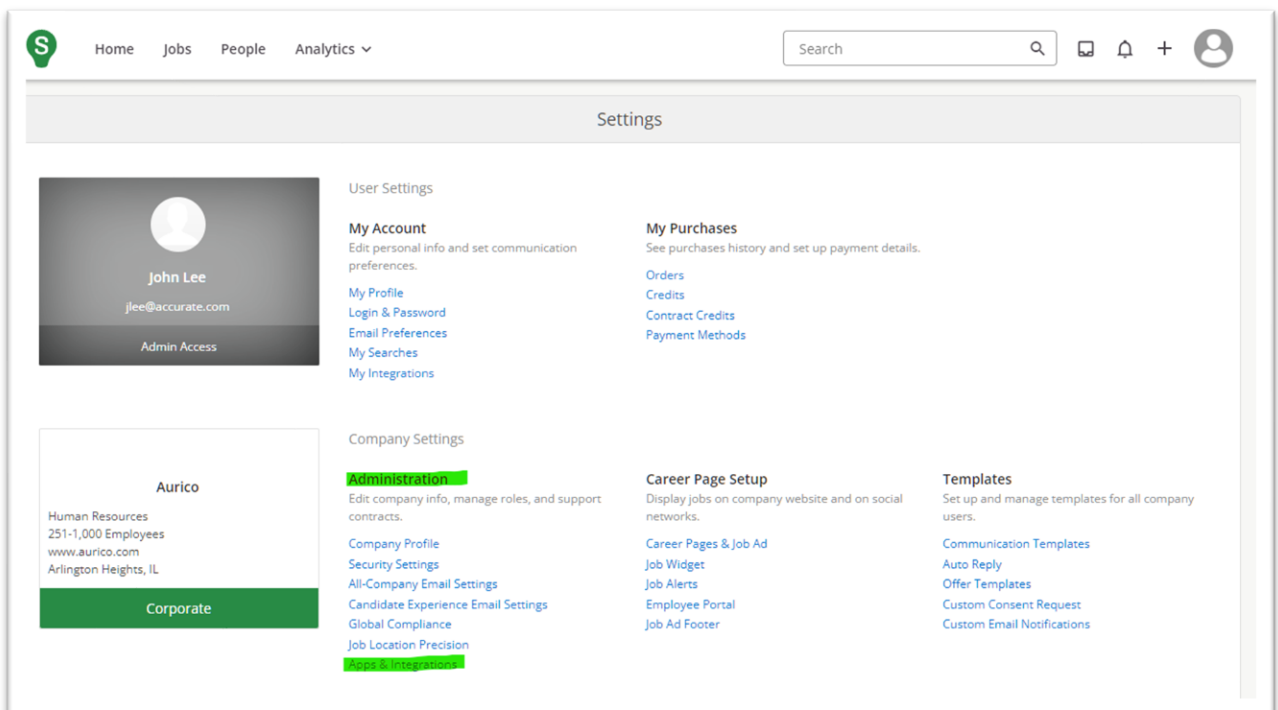
- d. Custom 'Job Field' should now be added and ready for use.

2) Enabling integration via the Apps & Integrations page - Follow these steps to initiate marketplace integration between Accurate and Smart Recruiters

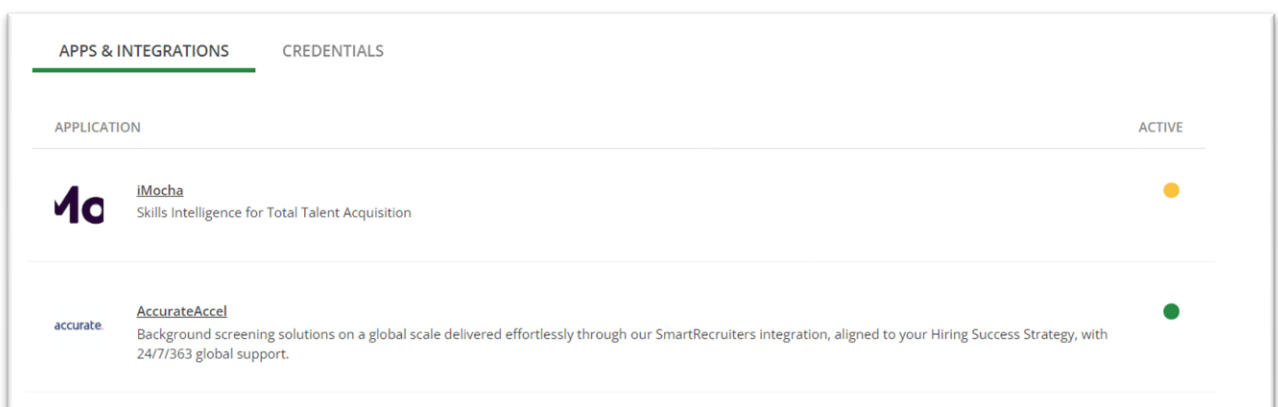
- a. Upon logging in as client user – select 'Settings'



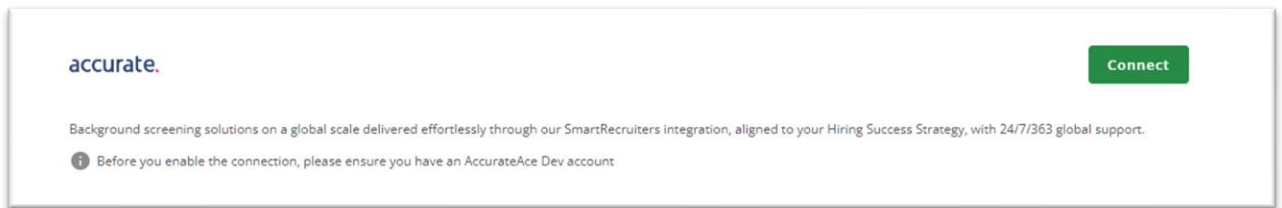
- b. Under the 'Administration' Section → Select 'Apps and Integrations'



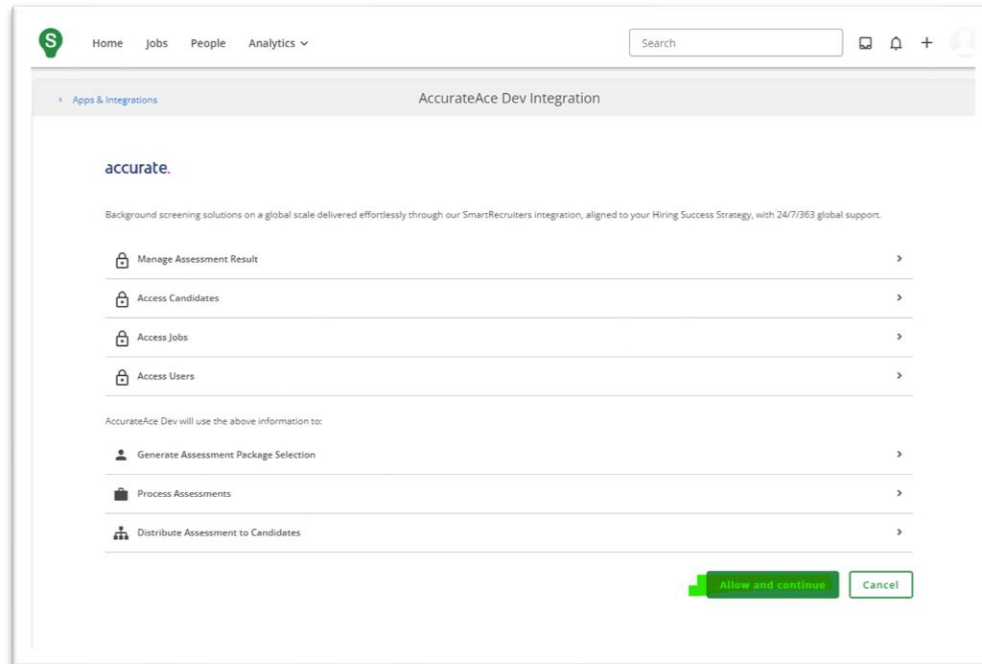
- c. Click on the integration 'status' icon for AccurateAccel



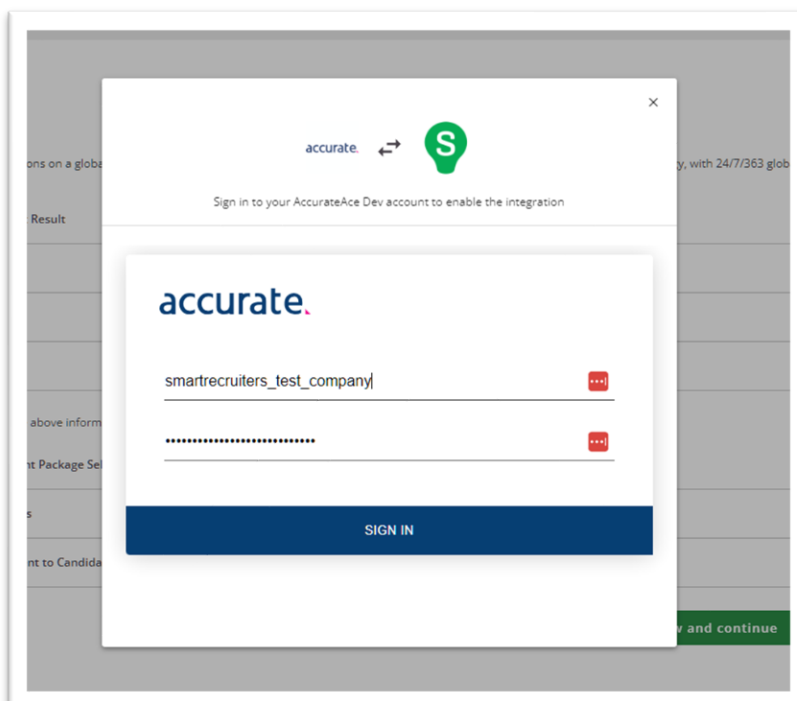
d. Click on 'Connect'



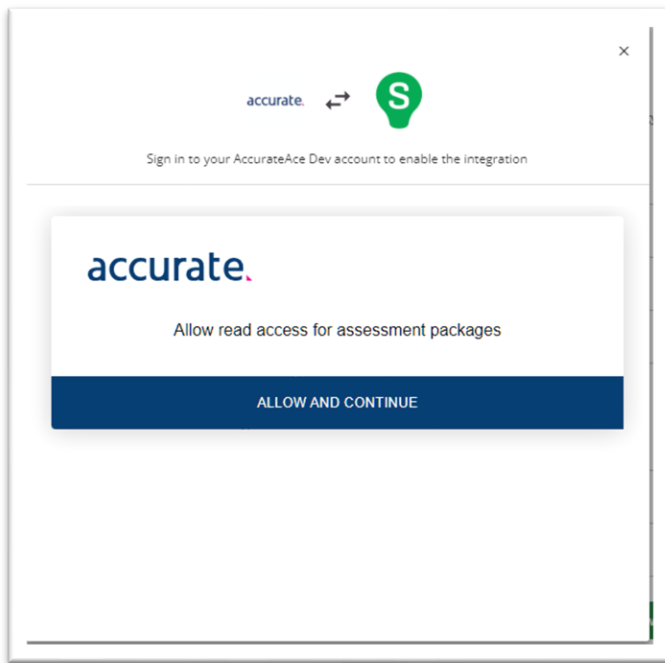
e. Click on 'Allow and Continue'



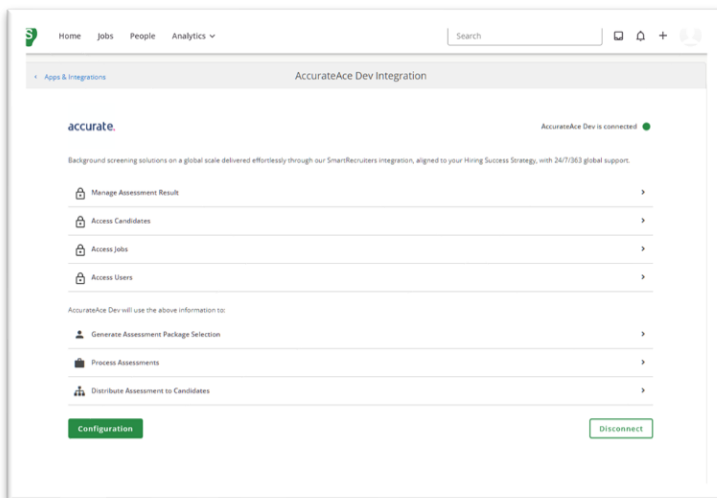
f. Popup will load; Enter in the username and password provided by the Accurate integration specialist; Click 'Sign In'



g. Click on 'Allow and Continue'



- h. Once 'Successfully Integrated' popup will close automatically and client will return to the integration screen

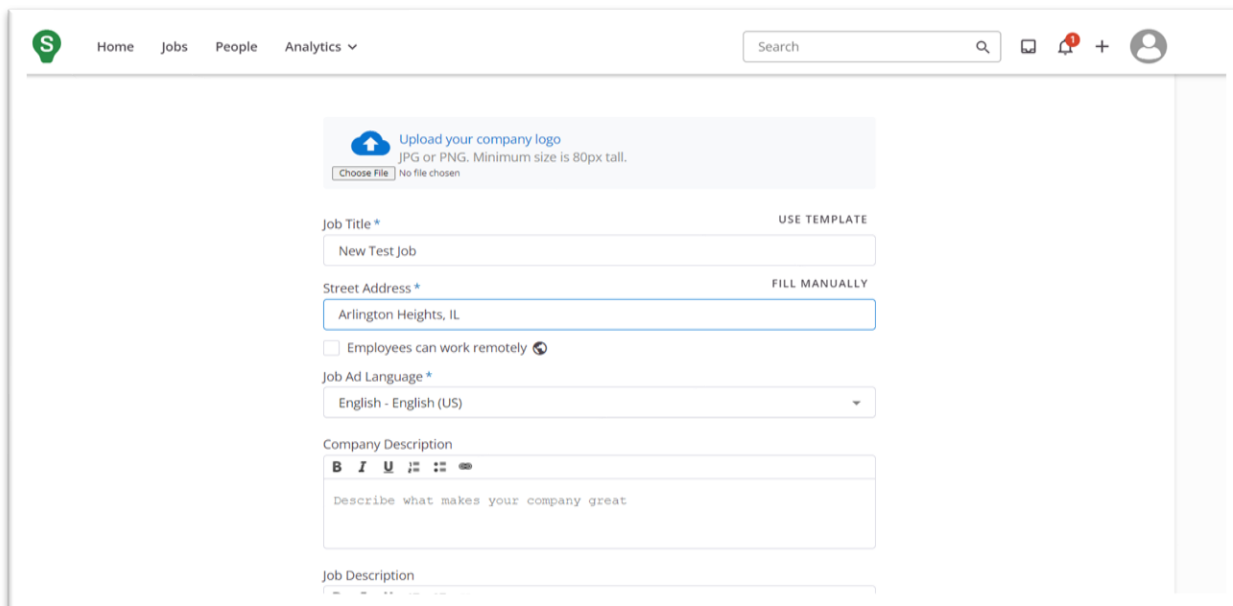
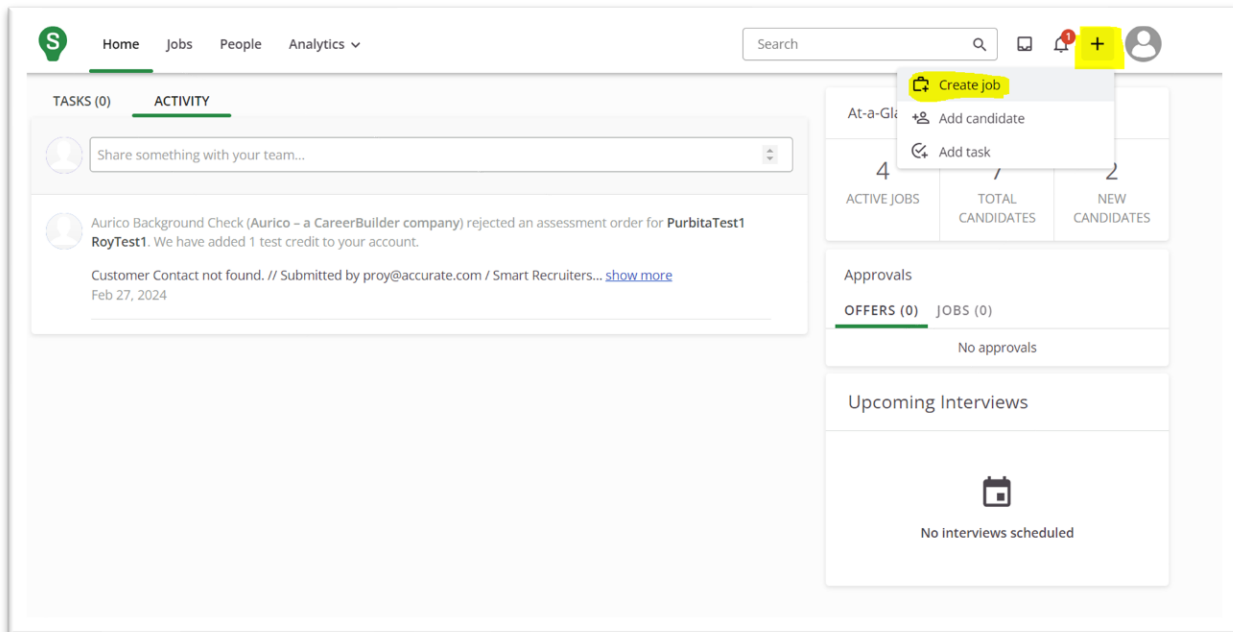


- i. AccurateAccel connection is complete.

Integration workflow

Job Preparation

1. If creating a new job, select the “+” symbol on the top-right corner of the screen



2. Optionally configure the Business Group and Division Fields. Values selected to be visible in Accurate's billing code fields

Create job

AB Accel Test Job | 7515 Irvine Center Dr, Irvine, CA 92618, USA | English

1 Create
2 Details
3 Hiring Team
4 Advertise
5 Share

ADD MORE DETAILS

Department
Type value

Business Group
Field Management

Division
Div04

Accurate Location
Type value

EEO Job Category
EEO Job Category

Ordering the Background Investigation

1. Go to "People"

S
Home
Jobs
People
Analytics

TASKS (3)
ACTIVITY

Aurico Background Check (Aurico – a CareerBuilder company) rejected an assessment order for **PurbitaTest1 RoyTest1**. We have added 1 test credit to your account.

Customer Contact not found. // Submitted by proy@accurate.com / Smart Recruiters... [show more](#)

Feb 27, 2024

At-a-Glance

9
ACTIVE JOBS

7
TOTAL CANDIDATES

2
NEW CANDIDATES

Approvals

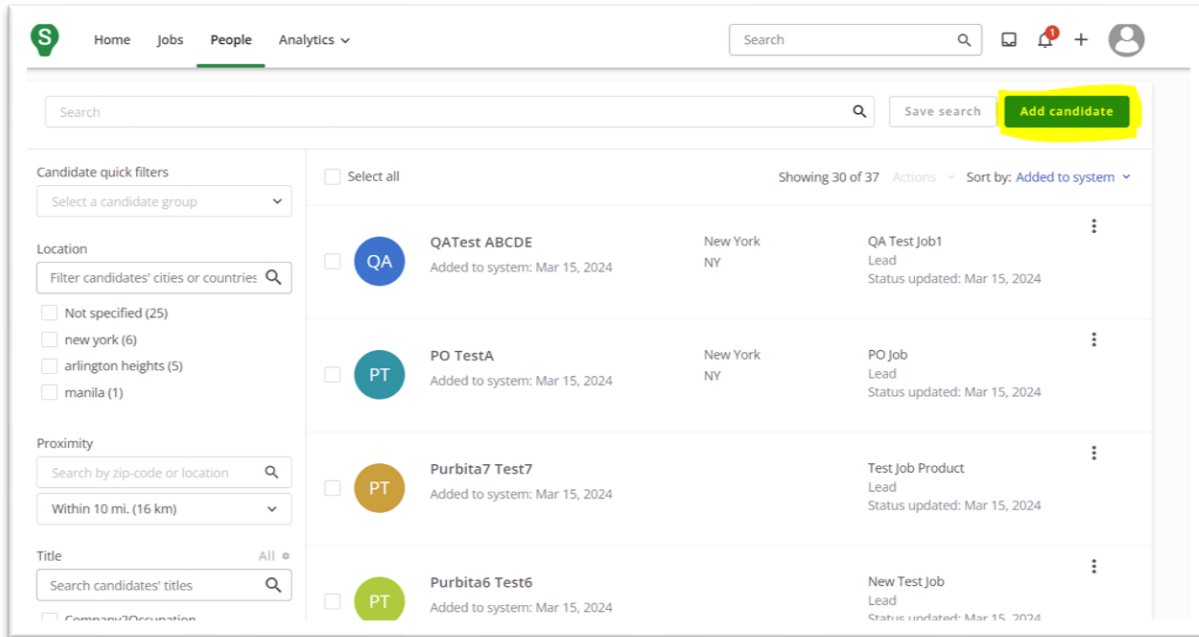
OFFERS (0)
JOBS (0)

No approvals

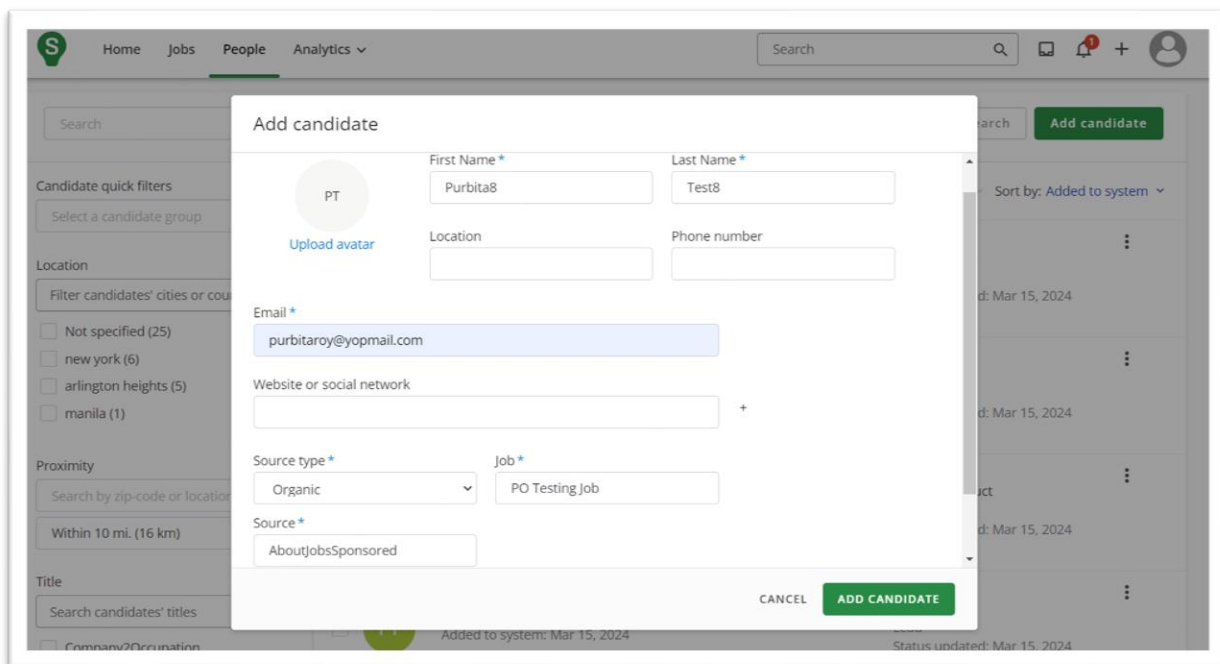
Upcoming Interviews

No interviews scheduled

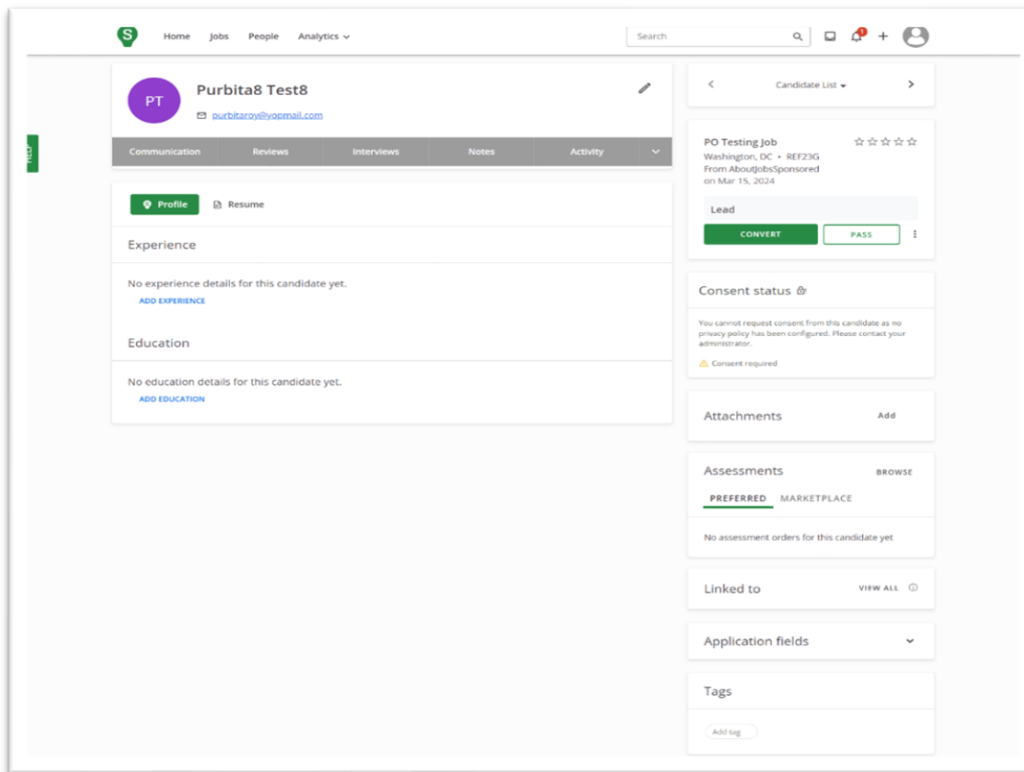
2. Add candidate



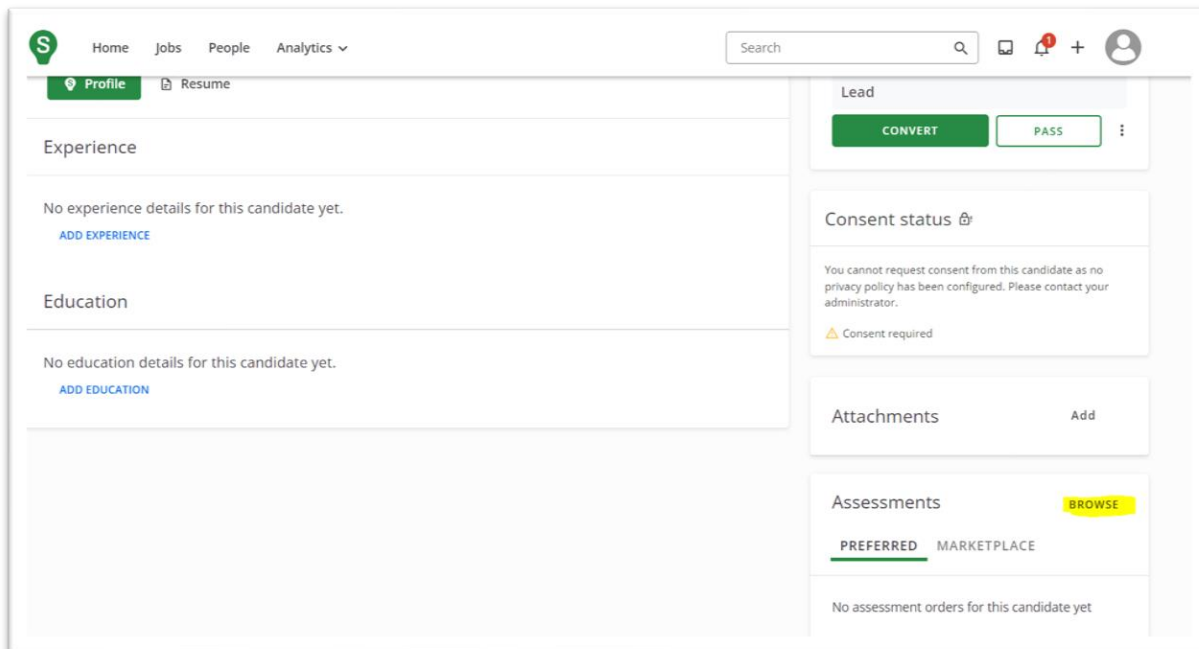
3. Fill Manually. Add First Name, Last Name and Email. Add Source Type and Source. Add "Job" that is configured with the customer.



4. After successfully creating a candidate, Go to the candidate profile.



5. In the “Assessment” Tab click on “Preferred” and select “Browse”



6. In the pop-up window ensure the partner selected is “AccurateAccel”. With the correct partner selected, a list of packages will be populated. Select a package and click “Continue”.

Assess AB Accel Test

Search

Select a partner: AccurateAccel

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Field Hourly Package (6397)
 Components: - Social Security Trace via Address Mover - 7 Year Felony/Misdemeanor search in all counties identified in SSN Trace - 7 year Federal Criminal search in all districts identified in SSN Trace - National Criminal Database Search - National Sexual Offender Database Search - Motor Vehicle Report - Adjudication - One Name Submission

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Package Seven (28835)
 Components: - Social Security Trace via Address Mover - National Criminal Database Search - Motor Vehicle Report - National Sex Offender Database

CANCEL

CONTINUE

7. Click on “Send”

Assess AB Accel Test

Confirm the assessment order for AB Accel Test
 AB Accel Test will receive an email with further instructions from the selected assessment vendors.

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Field Hourly Package (6397)
 Components: - Social Security Trace via Address Mover - 7 Year Felony/Misdemeanor search in all counties identified in SSN Trace - 7 year Federal Criminal search in all districts identified in SSN Trace - National Criminal Database Search - National Sexual Offender Database Search - Motor Vehicle Report - Adjudication - One Name Submission

PREVIOUS

SEND

8. The Background check will be initiated and show as In Progress when successful

Assessments

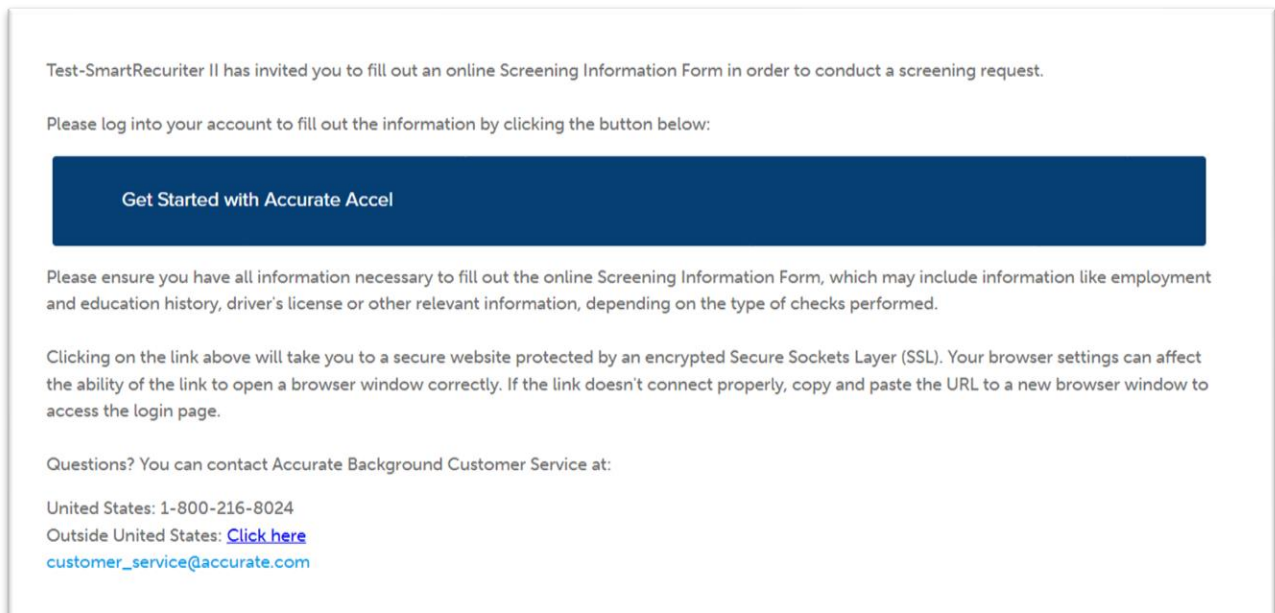
BROWSE

PREFERRED MARKETPLACE

- Field Hourly Package
 Order Y10746331 IN_PROGRESS
- NATIONAL SEX OFFENDER DATABASE SEARCH
 Component IN_PROGRESS
- ADDRESS MOVER
 Component IN_PROGRESS
- ADJUDICATION
 Component IN_PROGRESS
- NATIONAL CRIMINAL DATABASE SEARCH
 Component IN_PROGRESS

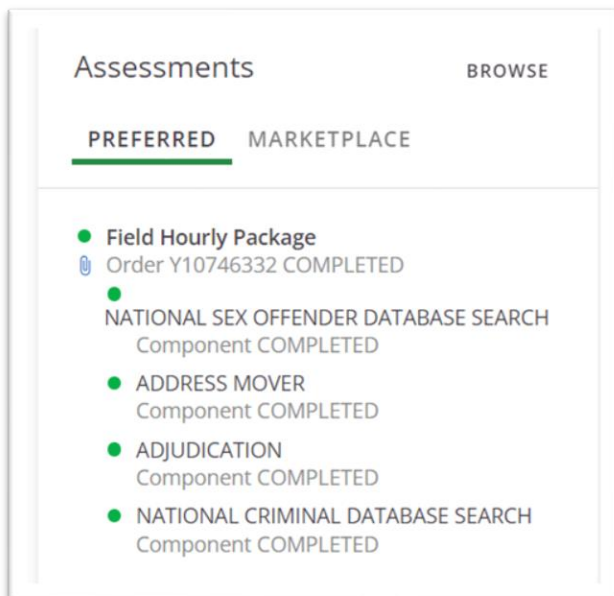
Candidate Process

1. Candidate receives the assessment invitation email



2. Fulfillment of the background investigation begins.

3. Once completed, the results are posted back to the SmartRecruiters platform



Potential customization (if applicable)

Customizations is currently out of scope for the to the standard AccurateAccel/SmartRecruiters integration.

Potential limitations/requirements (if applicable)

1. Integration is limited to a Send Invitation/TwoPass workflow at this time meaning that minimal information such as First Name, Last Name and Email are required, but Accurate collects and prepopulates additional relevant information for the Candidate. An invitation is then sent to the Candidate at time of order, requiring them to key in any missing information for the Package ordered.
2. Optional Components/Searches are not supported at this time. Background Investigation packages supported within this integration encompass default components only. For example, client would not have the ability to add an optional Employment Verification search to a package that did not include this service as a default service.
3. Requester information, specifically the requester's email address must match between SmartRecruiters and AccurateAccel in order to properly identify and validate the user submitting the request. If the requester email information provided by SmartRecruiters does not match exactly to the email address of a valid user on the account within AccurateAccel, then the request will fail.

Support contact

Client user will reach out to their applicable Account Manager or Account Management team, providing all details related to the question/issue.

Appendix

Frequently Asked Questions

Data Mapping