

Sterling Screening Integration Setup Guide for Customer Environments

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Introduction

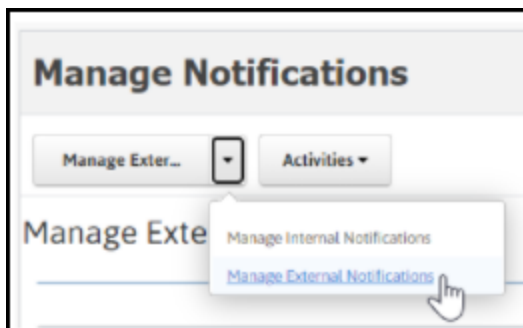
The purpose of this document is to explain how to set up the Sterling Screening integration on Adapt Customer systems.

Prerequisite

Enable External Notification

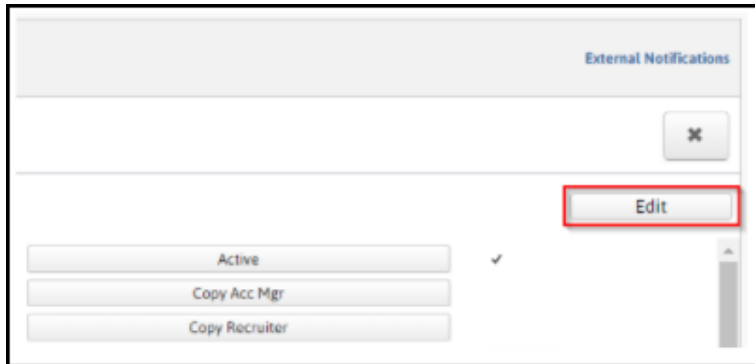
The Sterling Screening process requires that an external email notification be active to notify Candidates when a screening process is initiated and request further needed information.

1. Navigate to Administration -> Manage Notifications-> Manage External Notifications



2. Open 'Candidate Screening Welcome' from the list.

- Press the **Edit** button and modify the template as needed to reflect your messaging and branding.



- Sample Text for Candidate Screening Welcome:

Dear #CANDIDATE_NICKNAME#,

ABC Company has contracted with Sterling (a leading consumer reporting agency) to perform a background check as part of the application process. You will need to complete an electronic consent and disclosure form, as well as provide the relevant details of your employment history. The link below will take you to the data-collection portal in our secure server.

You are encouraged to carefully read the information provided about your rights under the Fair Credit Reporting Act, and the privacy and security of the information you provide.

This process can be significantly shortened if a legitimate e-mail address for your employers is provided, along with a supervisor name. Also, if you were contracted through a temporary agency, please provide the contact information of that agency rather than the company you were placed with.

[Click here to begin](#CandidateScreeningWelcomeLink#)

If you have any questions or need technical assistance, please contact Sterling toll-free at 888.889.5248

Thank you for your assistance!

Regards,

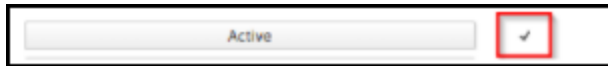
Sterling Verifications Department

For faster service when calling for assistance, mention Client Account ID: XXXXX

This email is CONFIDENTIAL. It is intended only for the use of the person to whom it is addressed. Any distribution, copying or other use by anyone else is strictly prohibited. If you have received this message in error, please telephone or email us immediately and destroy this message.

NOTE: The tag [Click here to begin](#CandidateScreeningWelcomeLink#) must be included. This link directs the candidate to supply any information needed to complete the screening(s).

- Ensure the **Active** field has been checked to enable this functionality.



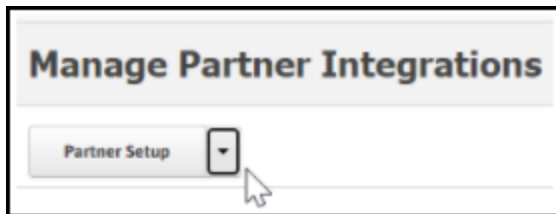
6. Press **Save** and exit.

NOTE: The **Resend Notice** function utilizes the same Candidate Screening Welcome template as the initial notification.

Enable Sterling Background as a Partner

You will need to enable Sterling Background as a Partner on your Adapt system:

1. Go to Administration -> Manage Partner Integrations -> Partner Setup



2. Open 'Sterling Background' from the list
 - Select **Edit**
 - Modify Active from N to Y and **Save**

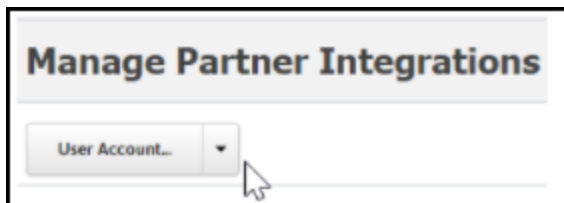


Account/User Setup Process

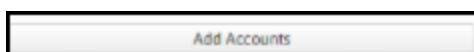
ONE Client ID and Authentication Key

This option is used for users who will be logging into Sterling under a single account.

1. Go to Administration -> Manage Partner Integrations -> User Account Setup.

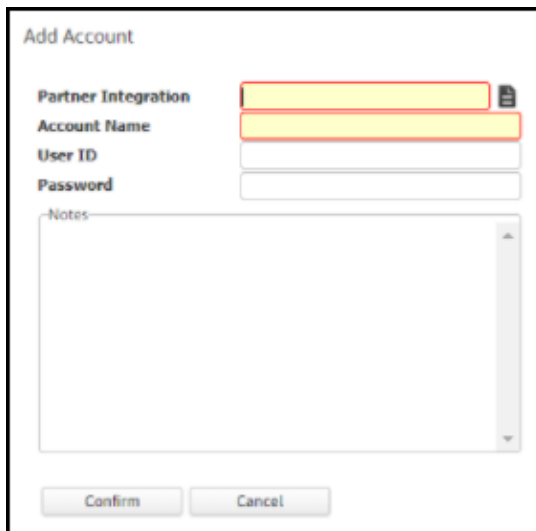


2. Select **Add Accounts**.



3. Choose Sterling Background as the Partner Integration and the Account name as desired.

4. Enter the required information with the User ID being the same Client ID and the Password being the Authentication Key, as provided by Sterling.
5. Enter any Notes as needed.
6. Press **Confirm**.



Add Account

Partner Integration

Account Name

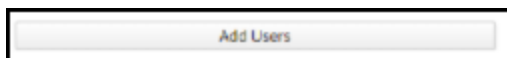
User ID

Password

Notes

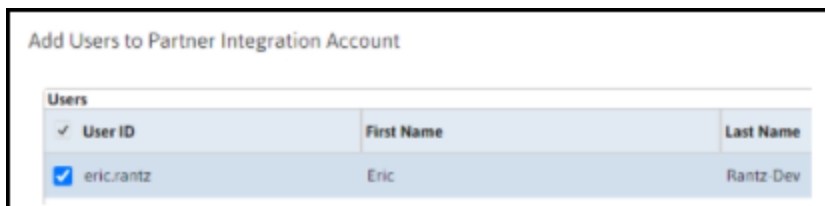
Confirm Cancel

7. Select the radio button next to the integration you just created and press the Add Users button.



Add Users

8. Select all the user accounts who will need access to the Sterling Background integration and press confirm.



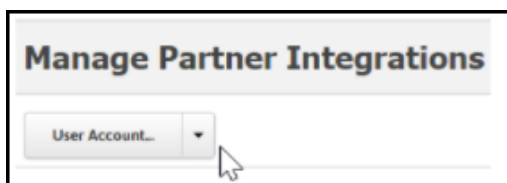
Add Users to Partner Integration Account

Users		
☒ User ID	First Name	Last Name
☒ eric.rantz	Eric	Rantz Dev

MULTIPLE Client ID and Authentication Keys

This option is for use where each user has their own login for Sterling. This will allow each user to receive their own emails and notifications when screenings are complete.

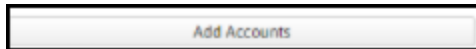
1. Go to Administration -> Manage Partner Integrations -> User Account Setup



Manage Partner Integrations

User Account...

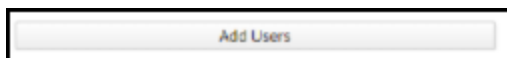
2. Select Add Account



3. Choose Sterling Background as the Partner Integration and the Account name as desired.
→ **TIP:** Having multiple listings all named the same 'Sterling Background' will get confusing. A suggestion is to use the name of the user whose Client ID and Authentication Key you will be entering.
4. Enter one Client ID in the Username field and Authentication Key in the Password field, as provided by Sterling
5. Enter any Notes as needed and press Confirm.

A dialog box titled "Add Account". It contains four input fields: "Partner Integration" (with a dropdown arrow), "Account Name", "User ID", and "Password". Below these is a large text area labeled "Notes". At the bottom are "Confirm" and "Cancel" buttons. The "Partner Integration" and "Account Name" fields are highlighted with a yellow background and a red border.

6. Select the radio button next to the integration you just created and press the Add Users button.



7. Find the user account matching the supplied Client ID and Authentication Key. Press **Confirm**.

A dialog box titled "Add Users to Partner Integration Account". It contains a table with the following data:

✓ User ID	First Name	Last Name
☒ eric.rantz	Eric	Rantz Dev

8. You will need to repeat these steps to create an account AND add the user for each Client ID and Authentication Key provided by Sterling.