

Sterling Screening User Guide for Customer Environments

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Introduction

The purpose of this document is to explain how to use the Sterling Screening integration on AdaptSuite Customer systems to initiate a screening and monitor its process.

Creating a Sterling Screening

Screening Creation Process

1. Open an existing Candidate record. Add or Update SSN and DOB as needed.
 - a. **OR** Create a new Candidate and populate the candidate's SSN and DOB in the **Personal Information** segment using the **Add New Confidential Information** workflow.
2. Ensure the listed Email Address is correct. This email is where the Candidate welcome email goes and is required to process any screenings.
3. Background screenings are created from the candidate's **Screening** Segment.
 - a. Click on **Create New Screening** to initiate the process



- b. Select available Package and press **Confirm**

Create Screening

Candidate Alex A Marques

Email Address a.marques@email.com

Select Package

This workflow will create a screening record and send an email notification to the candidate to provide disclosures and any additional required information.

NOTE: A duplicate check will prevent multiple screenings being created with the same Package as an existing screening in PREDRAFT status.

4. The requested screening will now be listed with the following information:
 - a. Adapt Screening#
 - b. Vendor Ref#
 - c. Vendor Screening#
 - d. Created (Date)
 - e. Submit Date
 - f. Screening Status
 - g. Screening Result
5. An email is sent to the candidate using the 'Candidate Screening Welcome' external notification template, and contains a link for the candidate to provide any further needed information for the screening package.
 - a. A journal entry is created for 'Candidate Screening Welcome Sent to <email address>'
6. A screening record is created and accessible in Adapt.
7. The screening does not populate the 'Search Package' section until the candidate completes their screening information request sent by the welcome email.
8. Once the Sterling Screening service completes the background or other checks needed for the screening, the record in Adapt is updated with the results.
9. Clicking the links for [Vendor Ref#](#) or [Vendor Screening#](#) takes you to the Screening Entity (These do not populate until the screening is submitted)

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Summary

Summary

Person	Renée Dä Jones	Status	COMPLETE
Screening ID	1801371120	Status Change Date	1/6/22
Package ID	83379	Result	Clear
Submit Date	1/6/22		

Additional Info

Search Package

Search ID	Search Type	Status	Status Change Date	Info
14547707	SSN Trace	COMPLETE	1/6/22	
14547708	County Criminal Record	COMPLETE	1/6/22	

10. On the entity, the only thing to edit is 'Additional Info'

Additional Functions

- The **View Screening Website** button will allow you to view the Candidate on the Sterling website with the search packages' type, status, and dates.

Create New Screening

View Screening Web Site

Sterling: Jones, Renée - Google Chrome

int.sterlingcheck.app/interactive-summary/#/order/aNmub9W%2fATonZu8TFRnakaT5Zhd%2fIchMu9WnBRCear0%3d

Jones, Renée Dä #1801371120

Order Status: Complete

Order Result: Clear

Overview Searches Data & Identity Attachments Activity Log

Sterling

Order Summary

Order Started	Order Completed
1/6/2022	1/6/2022

Account Name	Add Ons
ERECRUIT TEST ACCOUNT	—
Position	Bill Code
—	—
Package	Account Location
Standard Package	NEW YORK, NY

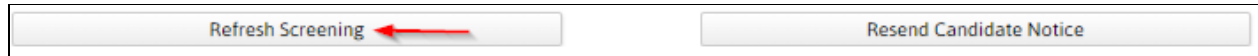
Candidate Information

First Name	Address
Renée	1234 Red Maple Ridge
Middle Name	Eau Claire, WI 54701
Dä	Email
Last Name	darren.whaley@hs-technologies.com
Jones	Phone
DOB	(715) 713-0060
1/3/XX	Location of Employment
SSN	—
XXX-XX-3133	Salary
	Unable to provide salary

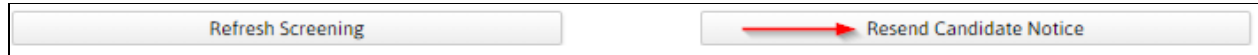
Submitted Searches

Searches	Identifier	Ordered	Complete	Status	ETA / Result
SSN Trace	XXX-XX-3133	1/6/2022	1/6/2022	Complete	COMPLETE
County Criminal Record	Jones, Renée Dä, WI-EAU CLAIRE	1/6/2022	1/6/2022	Complete	CLEAR

- The **Refresh Screening** button will refresh the Screening Status and Result fields, if any updates have been made by Sterling.



- The **Resend Candidate Notice** button will resend the welcome email to the Candidate and prompt them to provide any needed information to allow the screening to proceed.



- A journal entry will be logged for resending the candidate notice email.