https://aviontebOLDsupport.zendesk.com/hc/en-us/articles/4405227850515

Overview

Updated 08/13/2021

Asurint is proud to be the Premier Partner of Avionte for background screening solutions, offering an easy integration with Avionte's BOLD platform. Asurint helps to deliver an end-to-end view of the hiring process that improves workflow efficiencies, streamlines the recruiting process and shortens the onboarding cycle so you can hire the right talent with confidence.

The Asurint integration with AviontéBOLD allows you to use their screening services when performing your background check requests on prospective talent and the results are delivered to you in a report within the BOLD interface.

For information on the Version 1 Asurint integration, click here to see our Background Check Integration (v1) article.

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Integration Features

· Self-serve integration setup

· Restricted user permissions

· System level background check placement requirements

· Company level background check placement requirements

· In-app ordering

· Mass ordering from talent search

· Mass ordering from job nominations

· Background check billing

· Expiring background check monitoring

· Background check talent search terms

· Supporting analyze reports

· Background check data uplifted to BI

· Supporting widgets

· Background check auditing

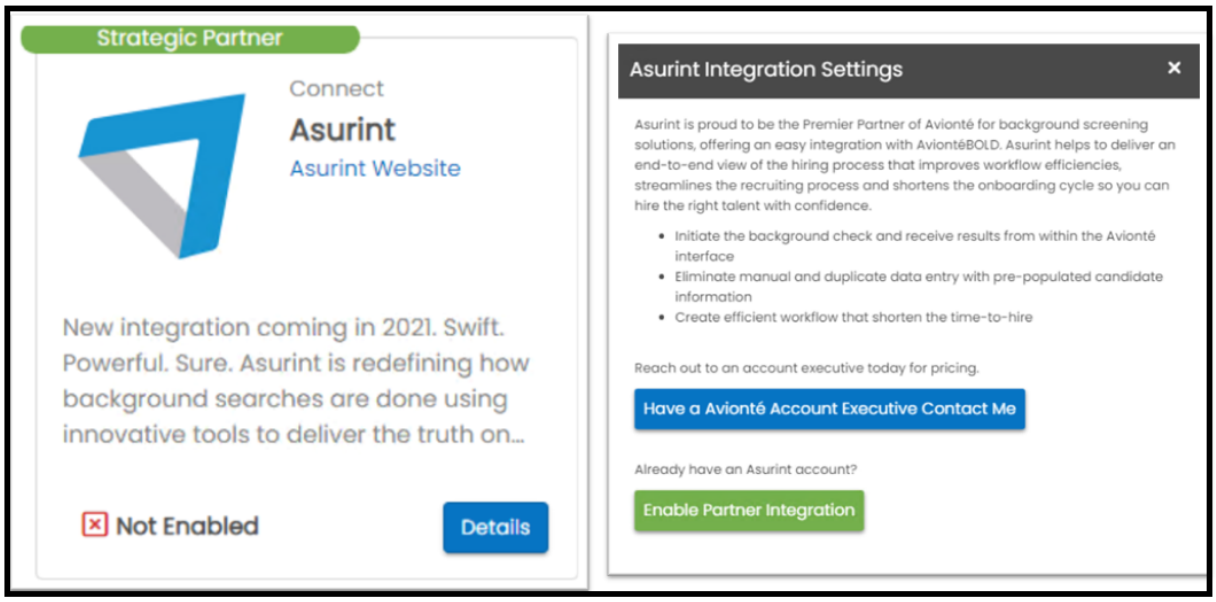
Integration Setup

This is a self-serve integration in that you are able to enable and configure it as long as you have your account credentials from Asurint.

Marketplace Integration Enablement

You will find the Asurint integration in the Marketplace and will have options to:

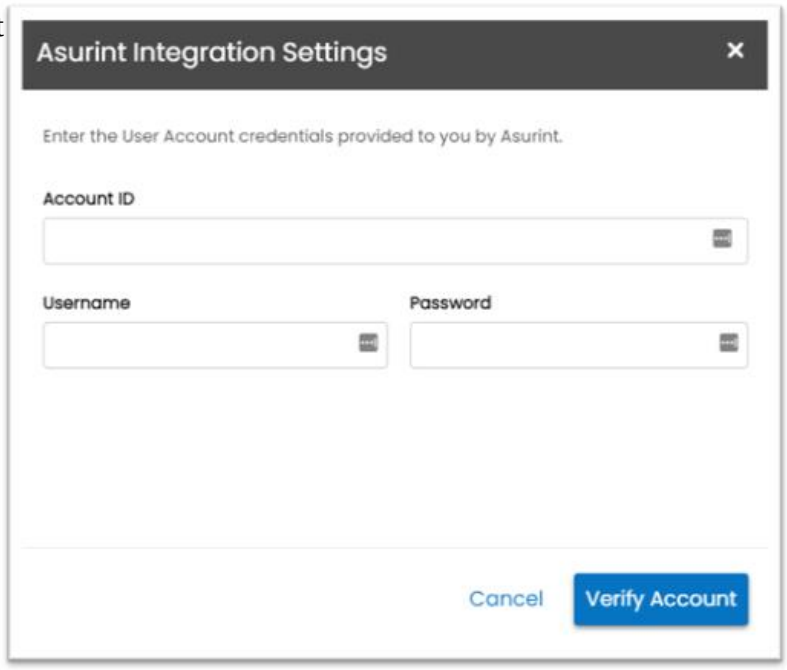
- Receive more information regarding Asurint and the integration offering
- Enable the integration yourself if you are an existing Asurint customer and have your Asurint credentials



Asurint Account Configuration & Validation

In order utilize the Asurint integration in BOLD, you will need to enter the following credentials:

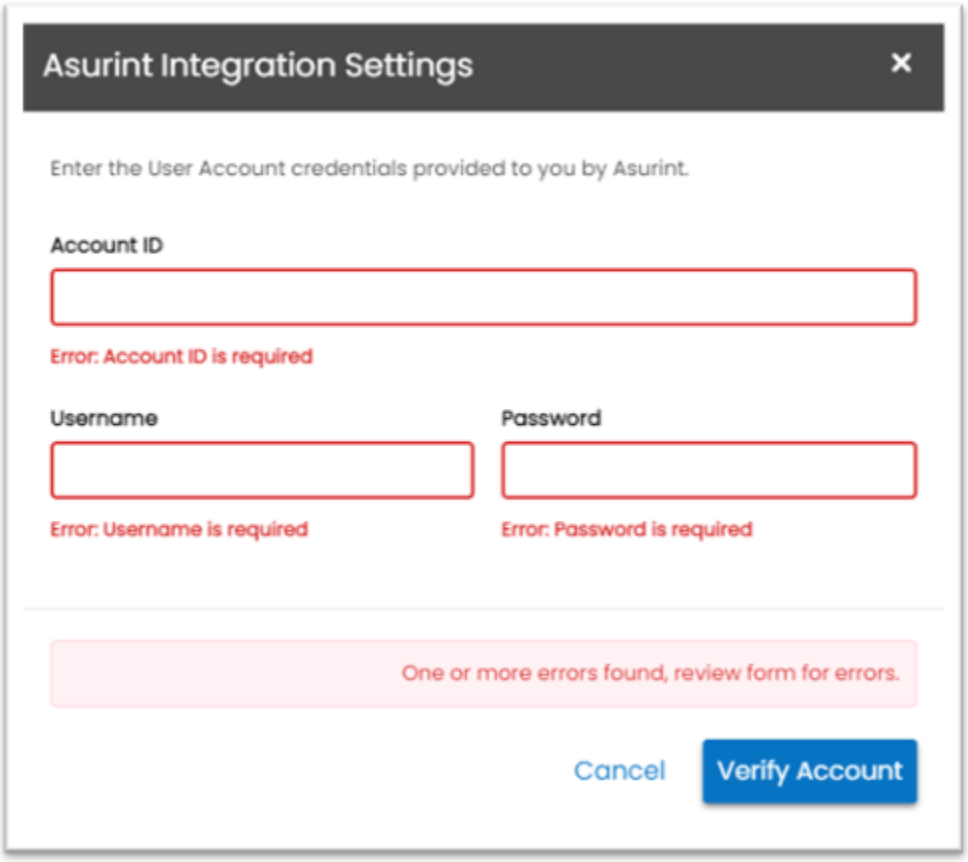
- Account ID – Provided by Asurint
- Username – Provided by Asurint
- Password – Provided by Asurint



Click the **Verify Account** button to validate the configured credentials.

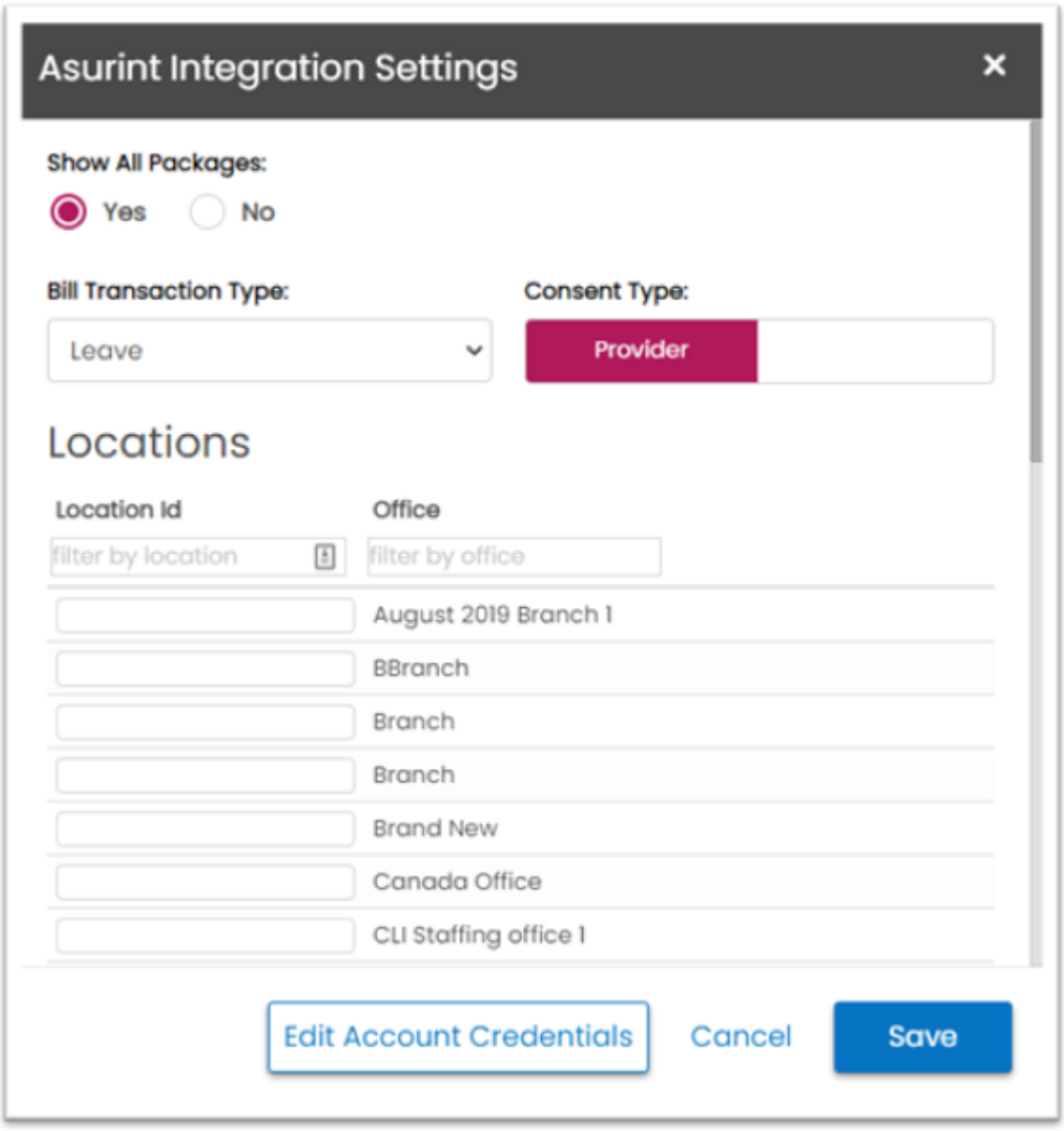
Validation Errors

- If required credentials are missing
- If Account ID is invalid
- If Username is invalid
- If Password is invalid



Marketplace Integration Configuration

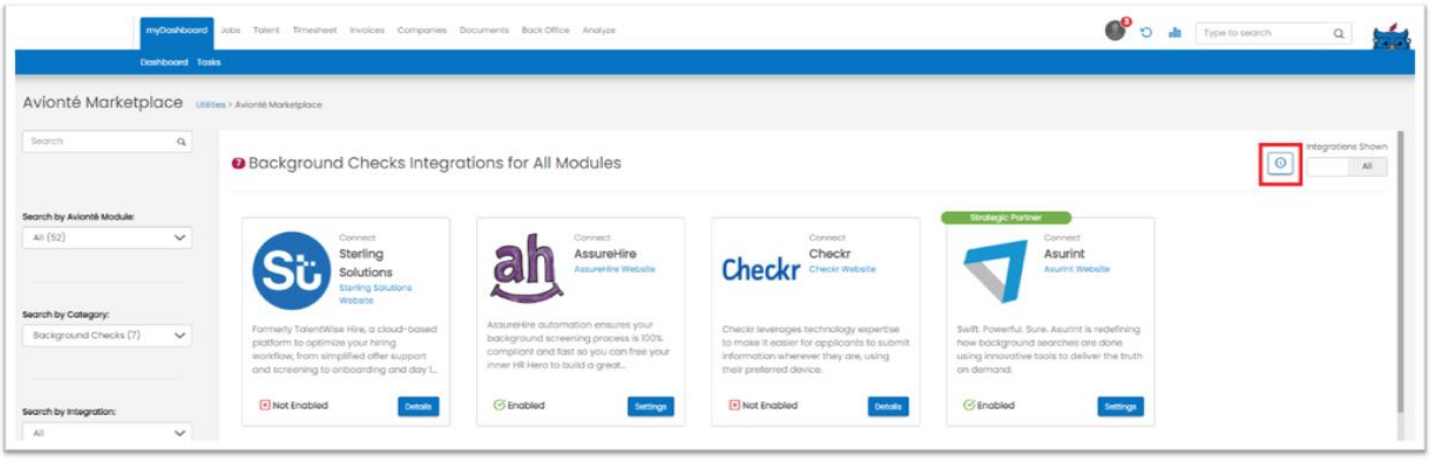
Once your Asurint account is validated, you will need to complete your integration configuration.



Property	Value	Description
Show All Packages [Yes/No]	Yes	Gives users the ability to order any configured packages for the account
	No	Restricts ordering to only the packages configured for the order location selected when requesting the background check
Bill Transaction Type [Dropdown]	Will be used with a future feature	
Consent Type [Provider/Staffing Company]	Provider	The background check provider will be sending the consent form to the talent Requires the following talent data to place an order: · First Name · Last Name · Email Address · Phone Number
	Staffing Company	The staffing company will be sending the consent form to the talent Requires the talent complete a consent form before the system will allow a user to order a background check Logged on Talent > Screening Page · Consent Toggle = Yes · Consent Date logged Requires the following talent data to place an order: · First Name · Last Name · Email Address · Phone Number · Address · SSN · Date of Birth
Location ID	Provided by Asurint	Each Asurint location ID needs to be mapped to a BOLD office

Marketplace Audit

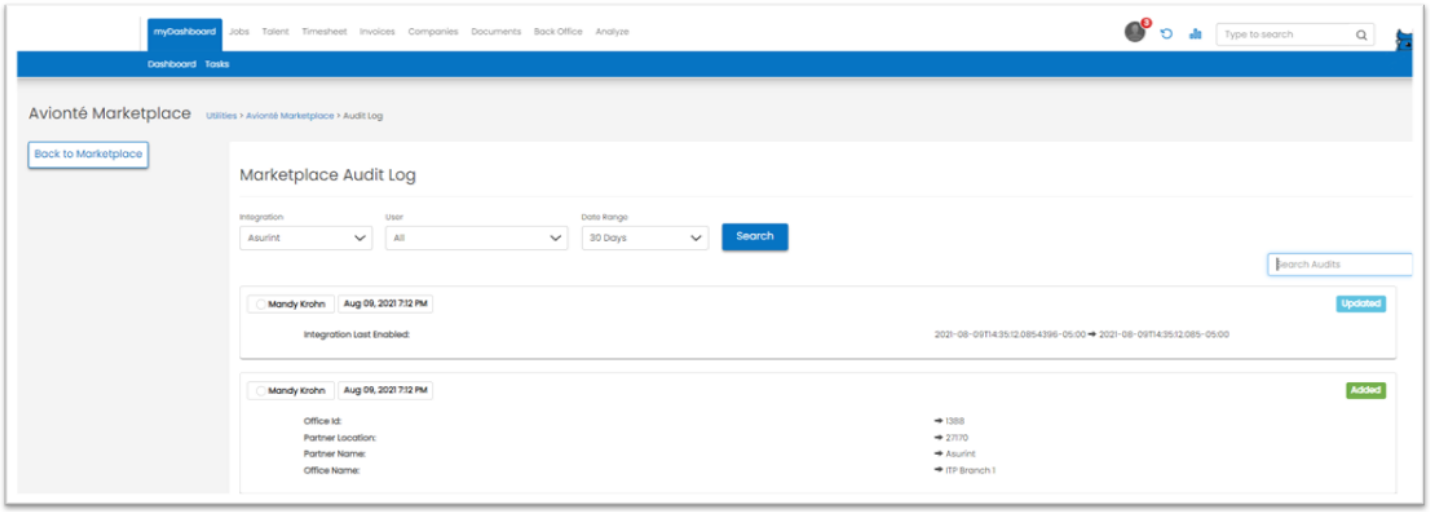
Changes to the integration configuration are being tracked in the Marketplace Audit.



Able to filter the Marketplace Audit based on the following:

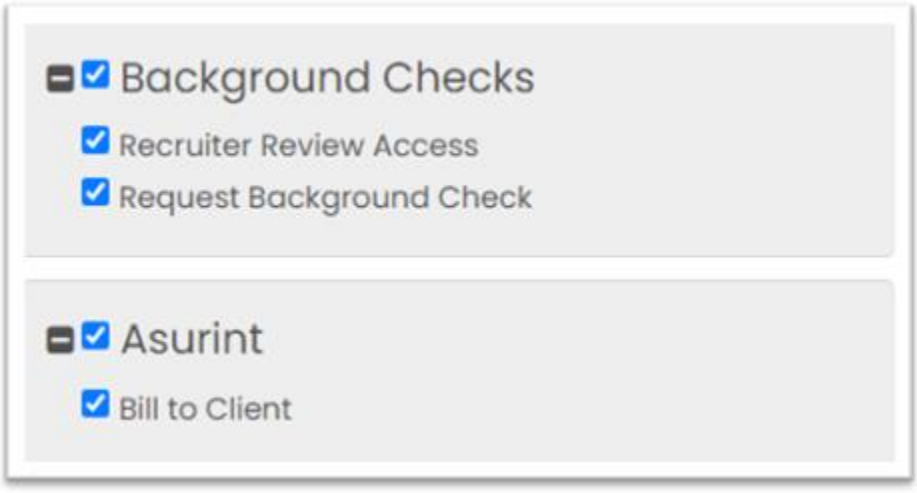
- Integration
- User
- Date Range

A search field is available to perform keyword searches within the Marketplace Audit.



User Level Permissions

There are 3 user level permissions that help ensure that users have the proper permissions and access to the background check data and features.



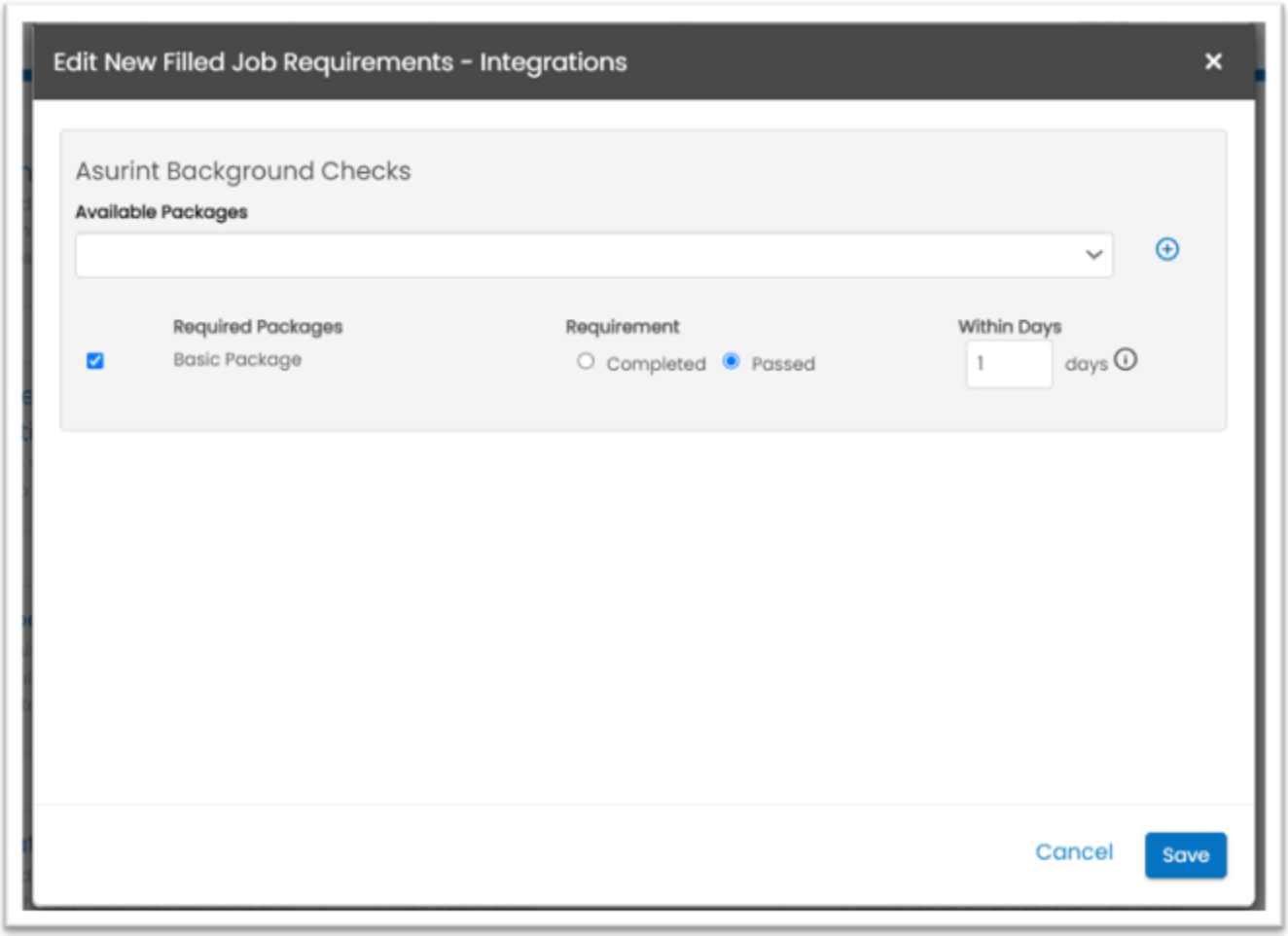
Property	Value	Description
Recruiter Review Access	True	Have the ability edit the background check Recruiter Review Status
	False	The background check Recruiter Review Status is visible but not editable
Request Background Check	True	Have the ability to order background checks
	False	Unable to order background checks
Bill to Client	Will be used with a future feature	

Job Requirements

System Level Job Requirements

You are able to configure system level background check requirements that would apply to every placement made in BOLD.

Navigate to Utilities > Table Editor > New Filled Job Requirements – Integrations



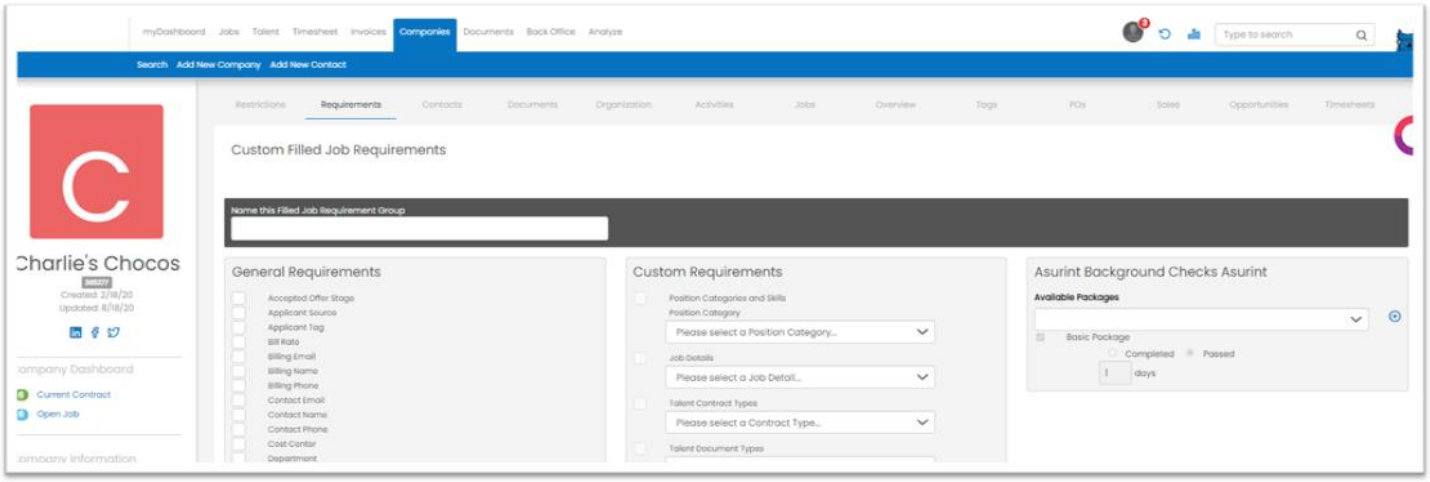
Configuration Steps

1. Select a package from the dropdown
2. Click +
3. Specify if the package is required to be passed or completed
    1. Passed – Validation will require the talent have the package completed and designated a "Passed" recruiter review status
    2. Completed – Validation will require the talent have the package completed
4. Specify the "Within Days" value
    1. Lookback period for a valid background check

Company Level Job Requirements

You are able to configure company level background check requirements that would apply to placements made for jobs with the company requirement set.

Navigate to Company > Requirements



Configuration Steps

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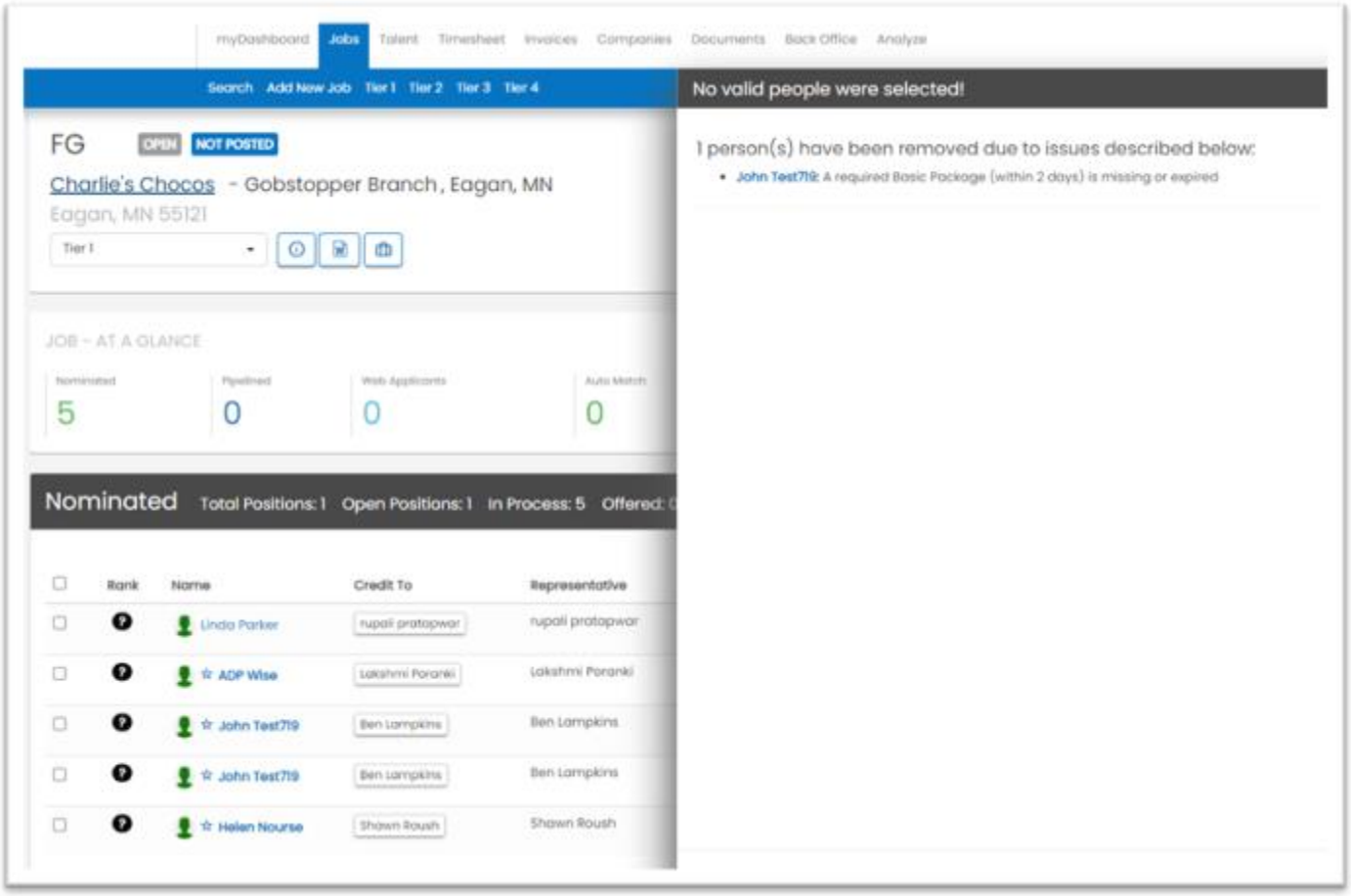
    1. Lookback period for a valid background check

Placement Validation

Upon placing a talent who doesn't meet either the system or the company level job requirements, an error will be displayed in the placement aside.

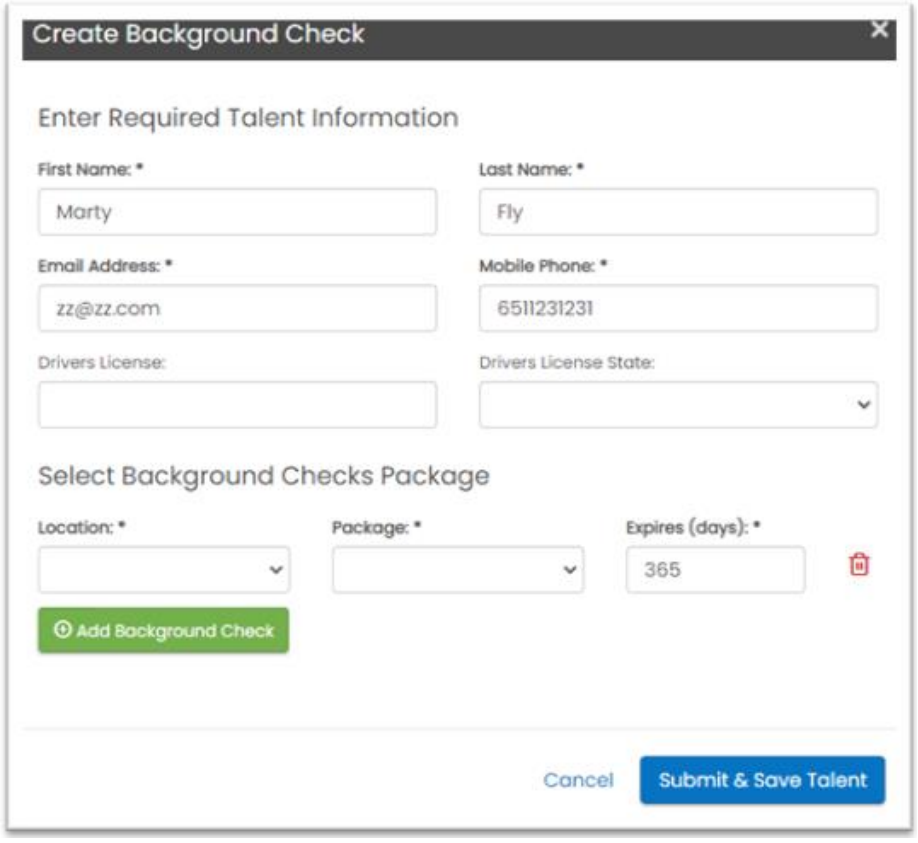


How to Order a Background Check

The Create Background Check aside and talent data requirements changes based on the Marketplace Consent setting.

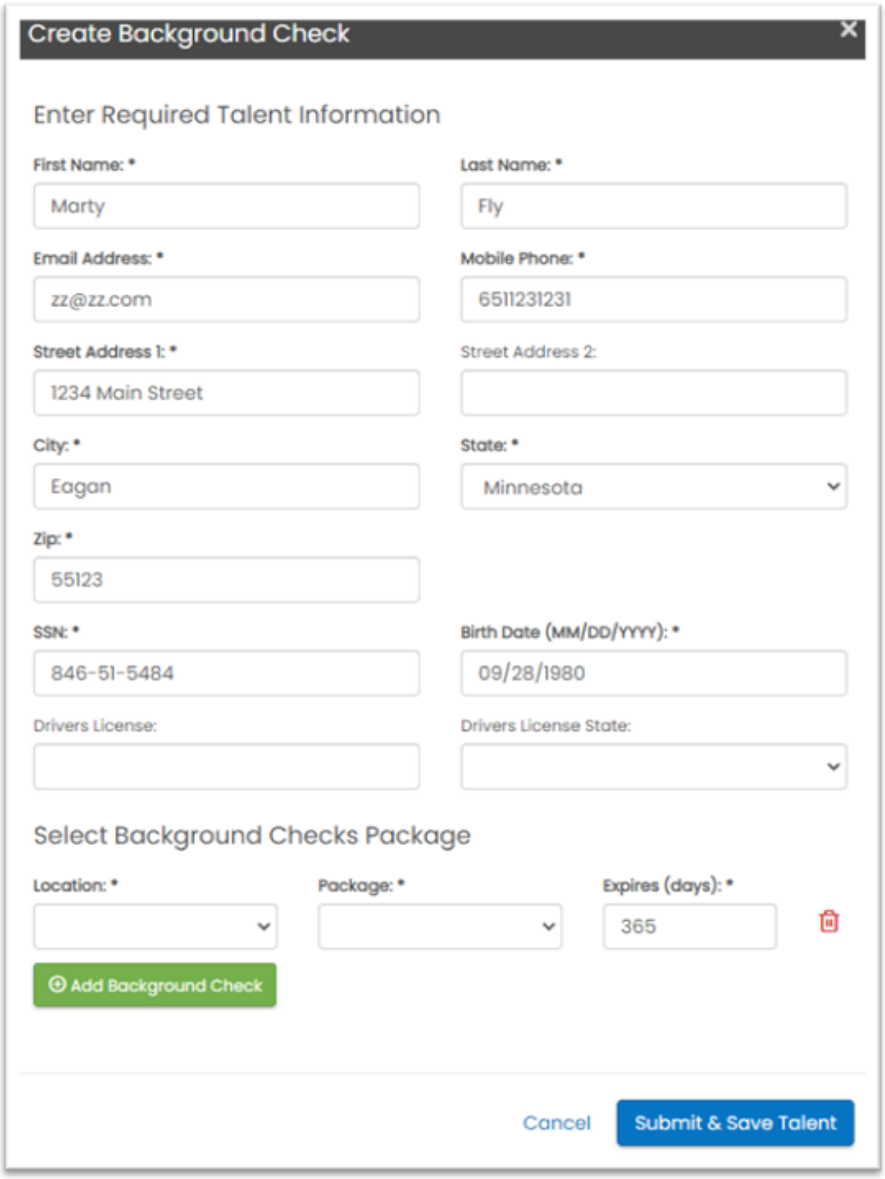
Send a Single Background Check Request - With Provider Consent

1. Navigate to the Talent profile
2. Select Screenings tab
3. Click Create New Background Check → Opens Create New screenings aside
4. Enter required talent data – fields will prepopulate with talent data if exists
    - First Name
    - Last name
    - Email
    - Phone Number
5. Select Location
    - Will only display offices configured with a Location ID in the Marketplace that the current user has access to
6. Select Package
    - Can order multiple packages at one time
7. Set Expiration Days
    - The number of days before a user can order the same package again
    - Prevents duplicate orders
8. Click Save & Send
    - If talent data is entered or updated in the aside, data will be saved back to the talent record



Send a Single Background Check Request - With Staffing Company Consent

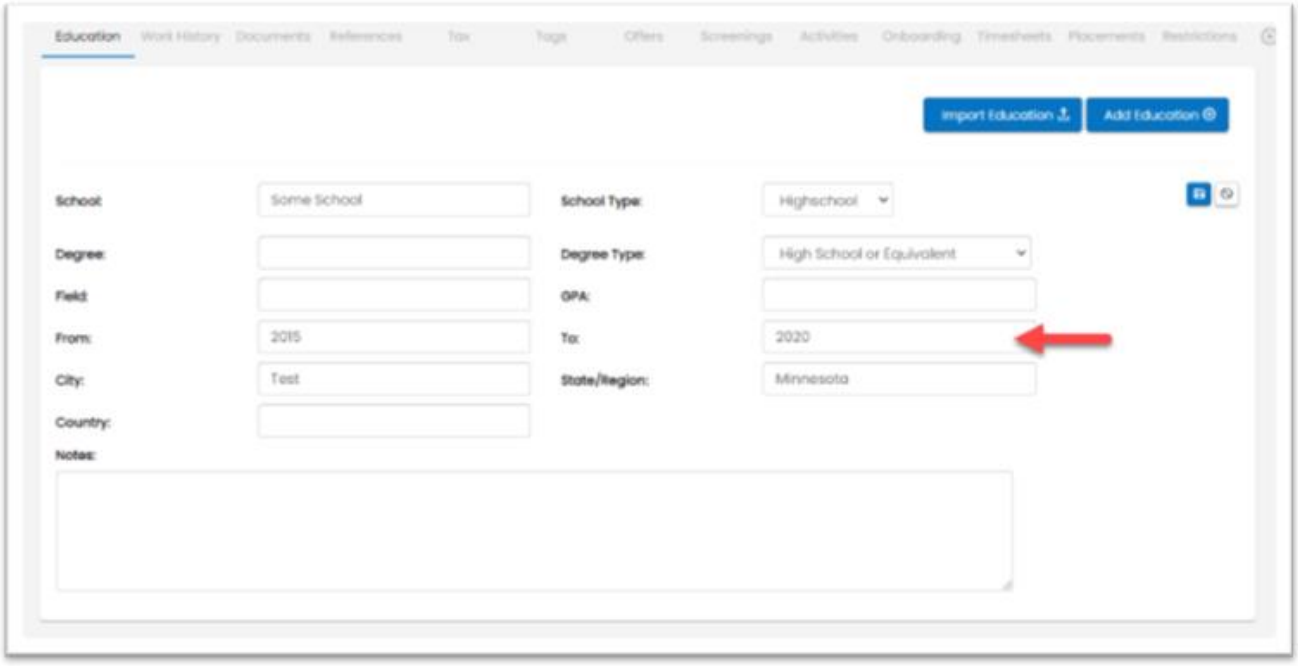
1. Navigate to the Talent profile
2. Select Screenings tab
3. Click Create New Background Check → Opens Create New screenings aside
4. Enter required talent data – fields will prepopulate with talent data if exists
    - First Name
    - Last name
    - Address
    - SSN
    - Date of Birth
    - Email
    - Phone Number
5. Select Location
    - Will only display offices configured with a Location ID in the Marketplace that the current user has access to
6. Select Package
    - Can order multiple packages at one time
7. Set Expiration Days
    - The number of days before a user can order the same package again
    - Prevents duplicate orders
8. Click Save & Send
    - If talent data is entered or updated in the aside, data will be saved back to the talent record

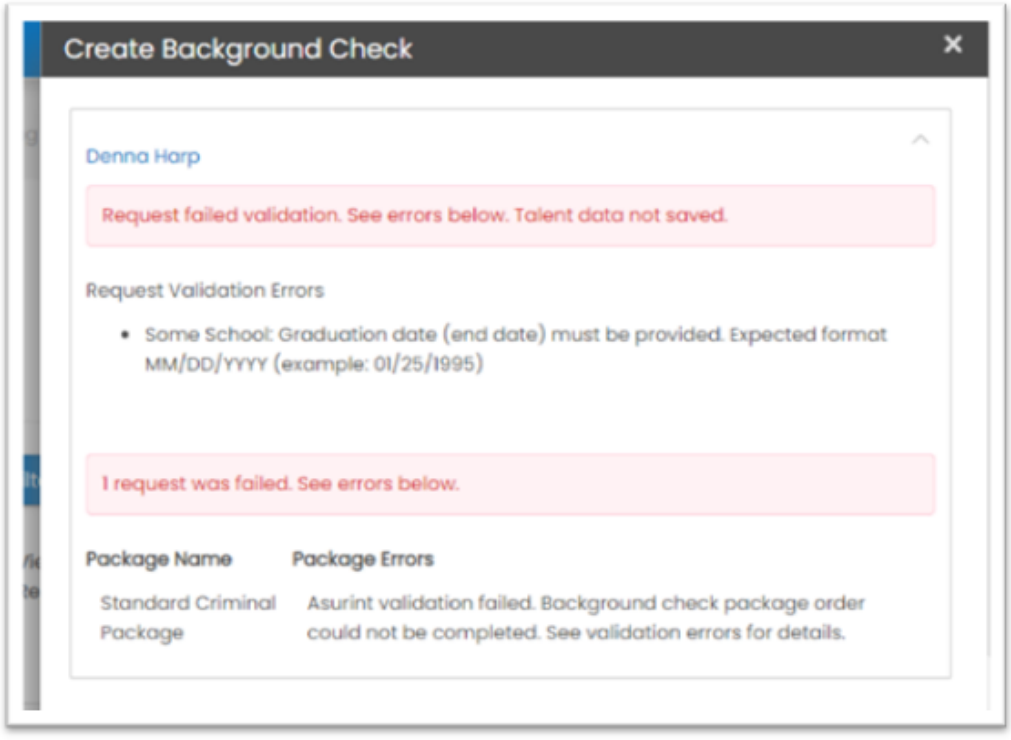


Order Request Validation Errors

When there is an issue with the talent's data that would cause failure in creating an order with Asurint, an error will be displayed in the aside.

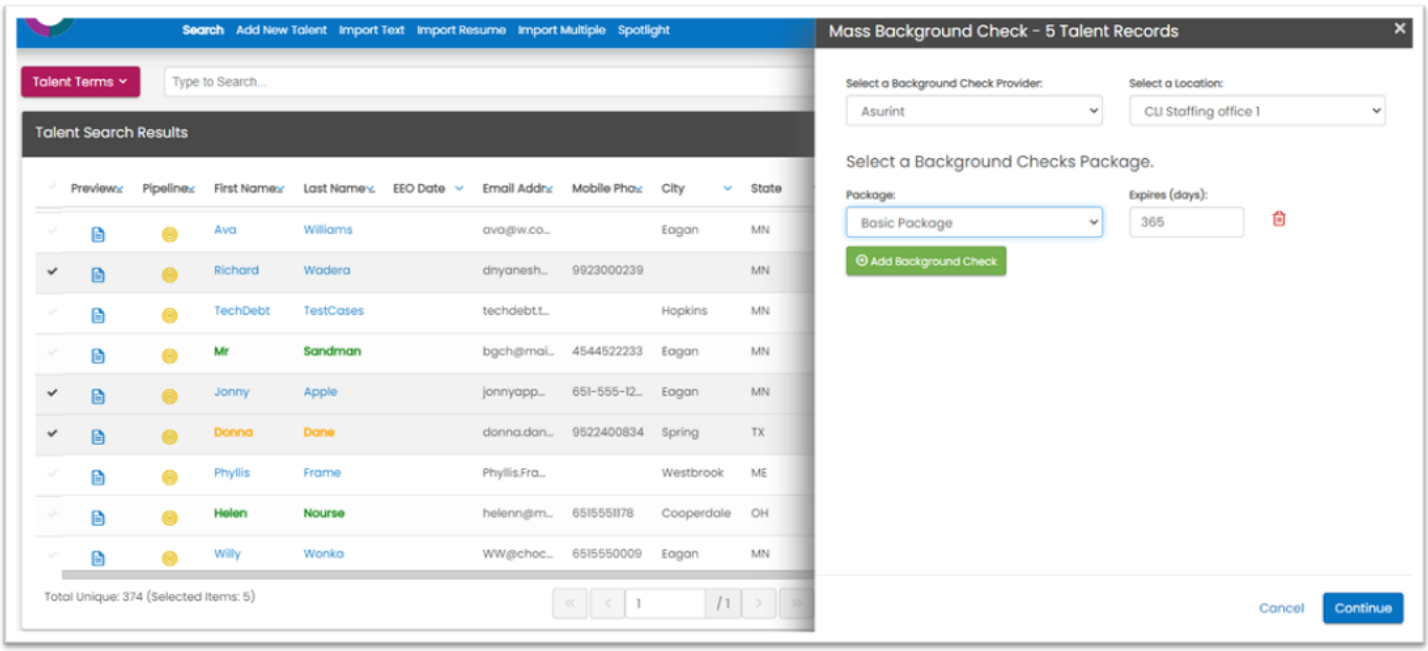
Example: Incorrect education "To" value
Incorrect Value: 2020



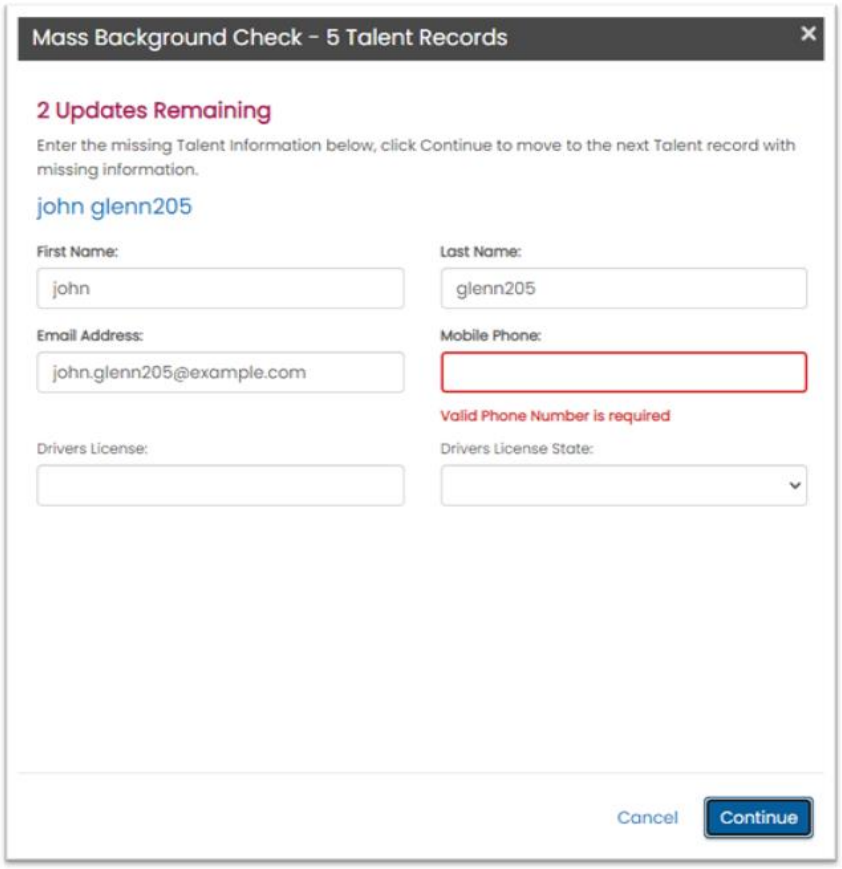


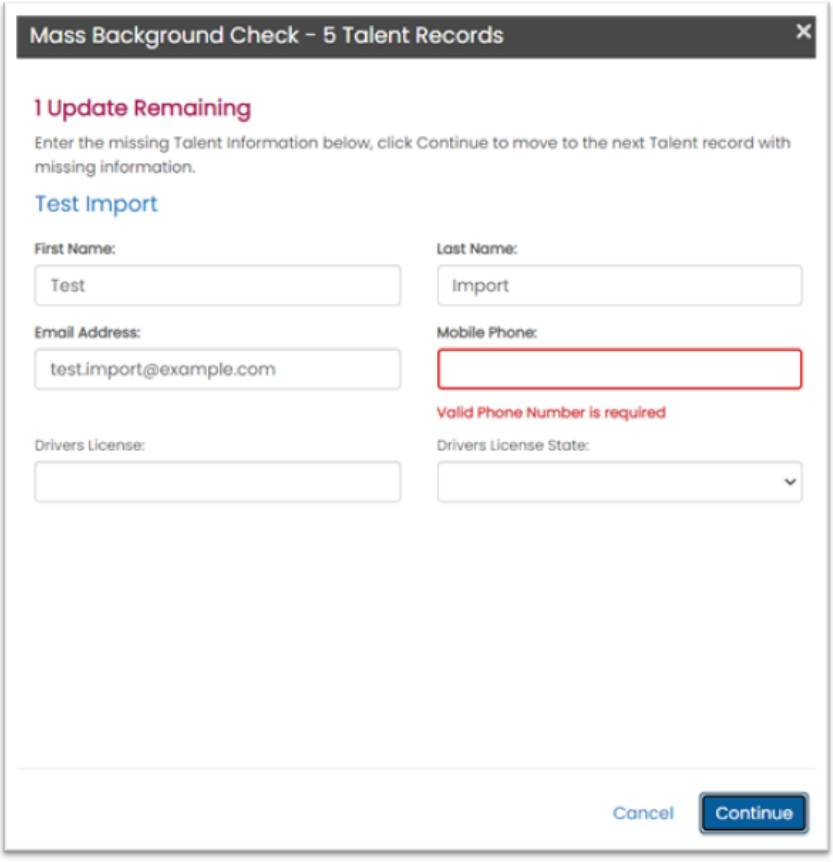
Mass Ordering - With Provider Consent

1. Navigate to the Talent search page
2. Select up to 15 talent
    - If more than 15 are selected, you will receive an error when ordering
3. Click the Mass Action dropdown
4. Select Mass Background Check
5. Select Location, Package, and Expires values
6. Click Continue

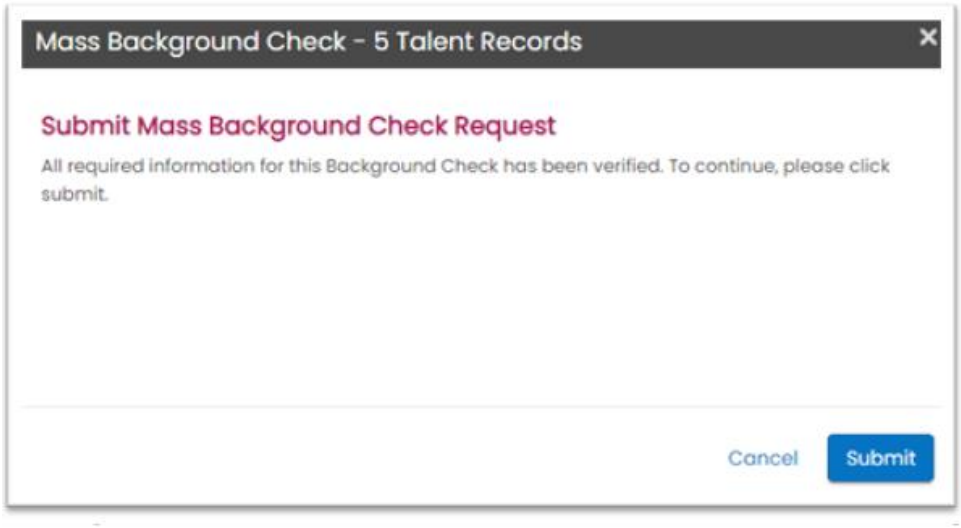


7. Data validation check runs to confirm if the selected talent records have all required data elements to place the order.
    - If required data is missing, the talent records will be displayed in the aside.
    - The aside will display the number of records that need to be updated
    - There will be a link to the talents' records for quick navigation
    - Missing required information will be highlighted
    - Click Continue to page through the talent records that require updates

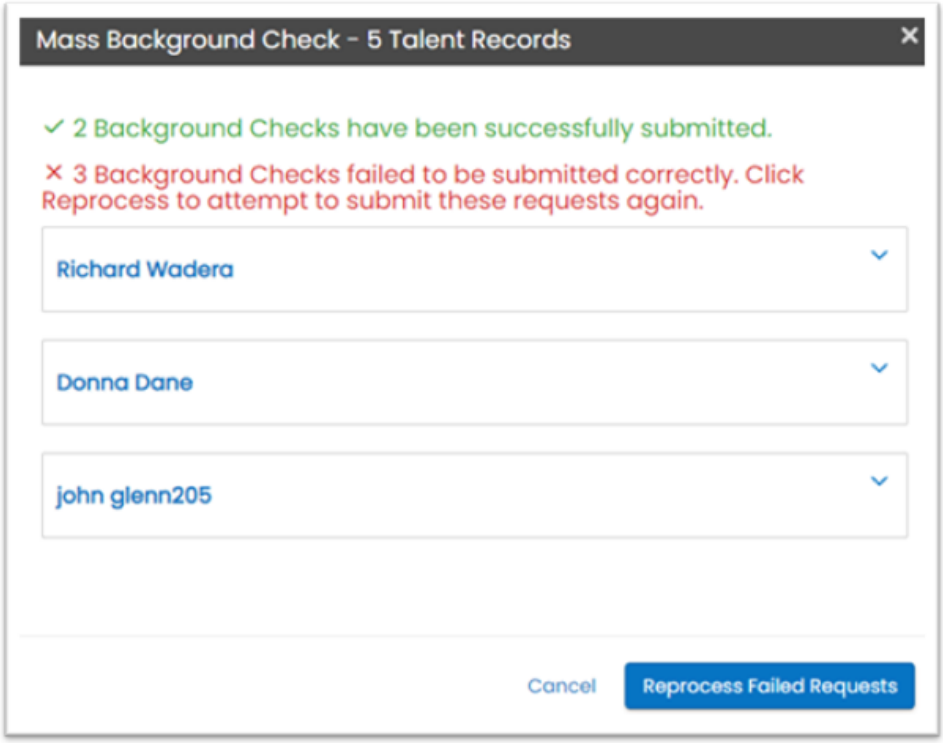

Mass Background Check - 5 Talent Records
2 Updates Remaining
Enter the missing Talent Information below, click Continue to move to the next Talent record with missing information.
john glenn205
First Name:
john
Last Name:
glenn205
Email Address:
john.glenn205@example.com
Mobile Phone:
Valid Phone Number is required
Drivers License:
Drivers License State:
Cancel
Continue

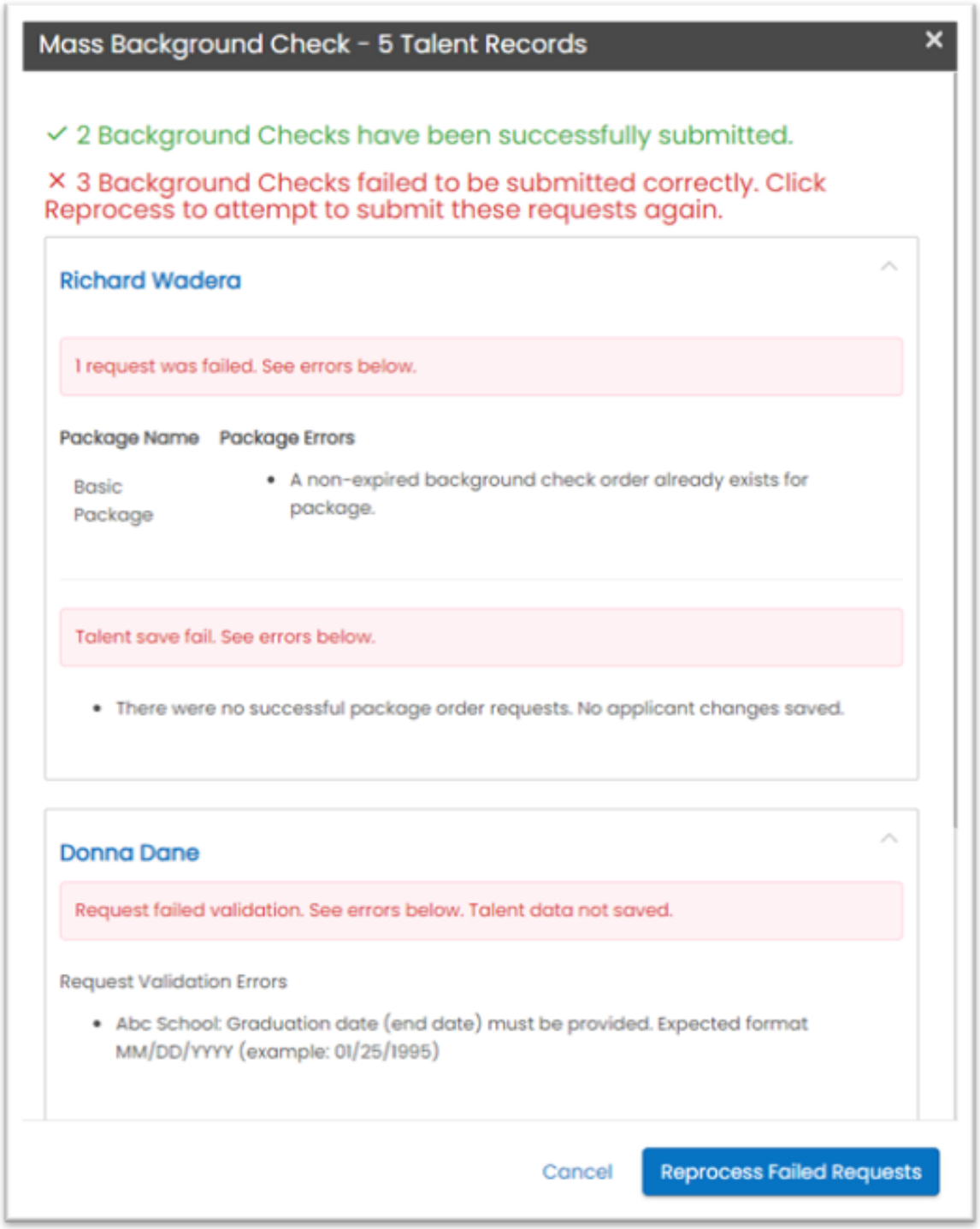

Mass Background Check - 5 Talent Records
1 Update Remaining
Enter the missing Talent Information below, click Continue to move to the next Talent record with missing information.
Test Import
First Name:
Test
Last Name:
Import
Email Address:
test.import@example.com
Mobile Phone:
Valid Phone Number is required
Drivers License:
Drivers License State:
Cancel
Continue

8. Once all required talent data has been entered, you'll receive a message in the aside instructing you to submit the order.



9. A confirmation message will be displayed in the aside with the number of successful and failed orders.
   - # of successful orders are displayed in green
   - # of failed orders are displayed in red
   - Errored talent listed in the aside
   - Expand the screen to see detailed error
   - Depending upon the error, you can fix the issues and click the Reprocess Failed Requests button to order again




Mass Background Check - 5 Talent Records
✓ 2 Background Checks have been successfully submitted.
✕ 3 Background Checks failed to be submitted correctly. Click Reprocess to attempt to submit these requests again.
Richard Wadera
1 request was failed. See errors below.
Package Name
Package Errors
Basic Package
A non-expired background check order already exists for package.
Talent save fail. See errors below.
There were no successful package order requests. No applicant changes saved.
Donna Dane
Request failed validation. See errors below. Talent data not saved.
Request Validation Errors
Abc School: Graduation date (end date) must be provided. Expected format MM/DD/YYYY (example: 01/25/1995)
Cancel
Reprocess Failed Requests

Mass Ordering - With Staffing Company Consent

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2. Select up to 15 talent
    - If more than 15 are selected, you will receive an error when ordering
3. Click the Mass Action dropdown
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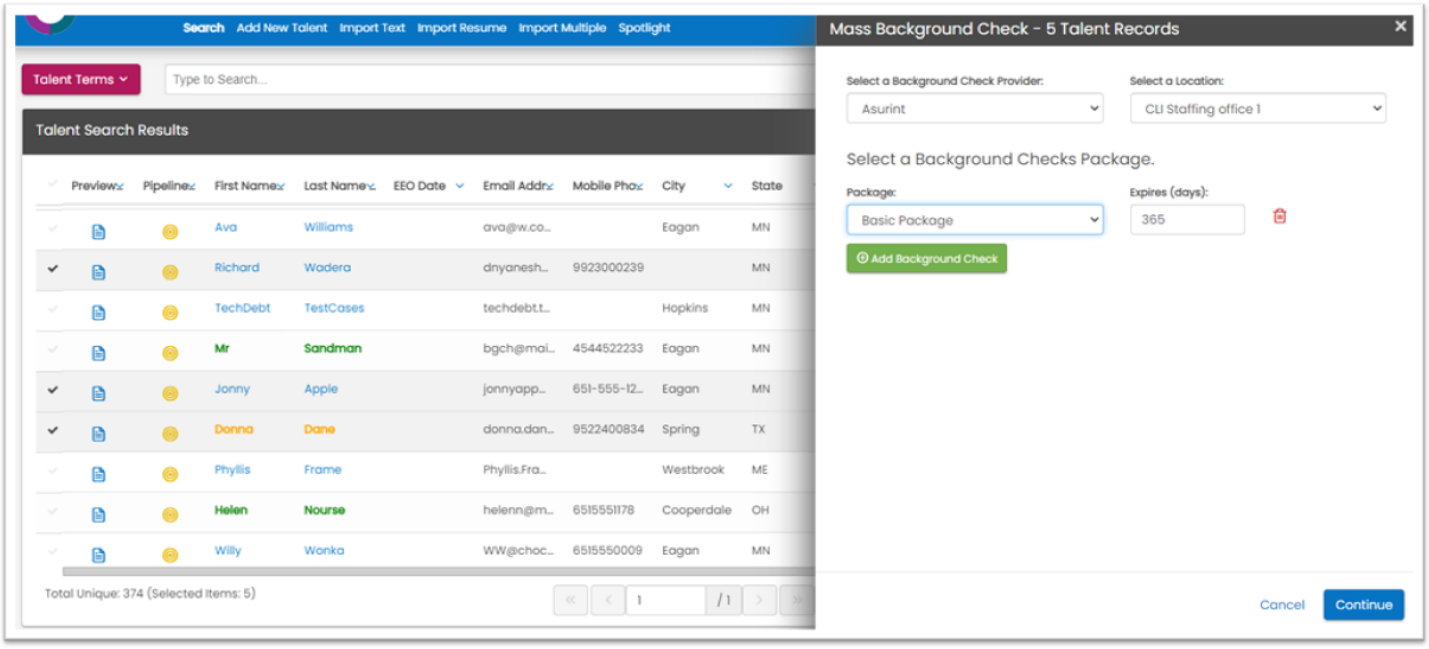
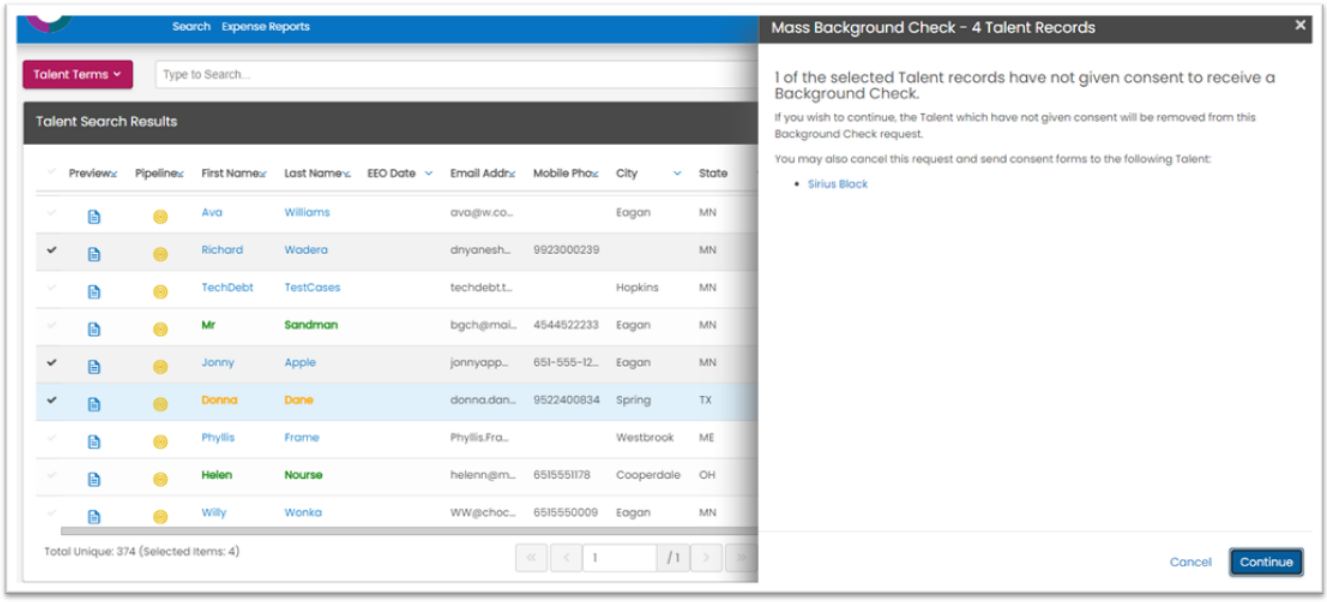


7. Consent validation check runs to confirm if the selected talent records have completed a consent form
    - Checks against the Consent field on the Talent > Screening page



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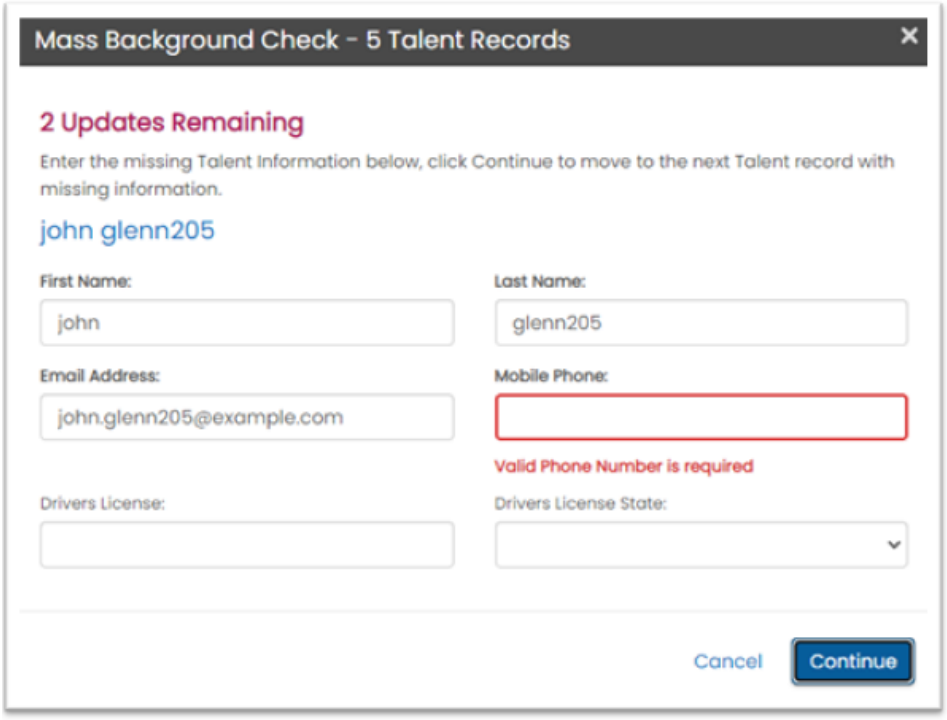

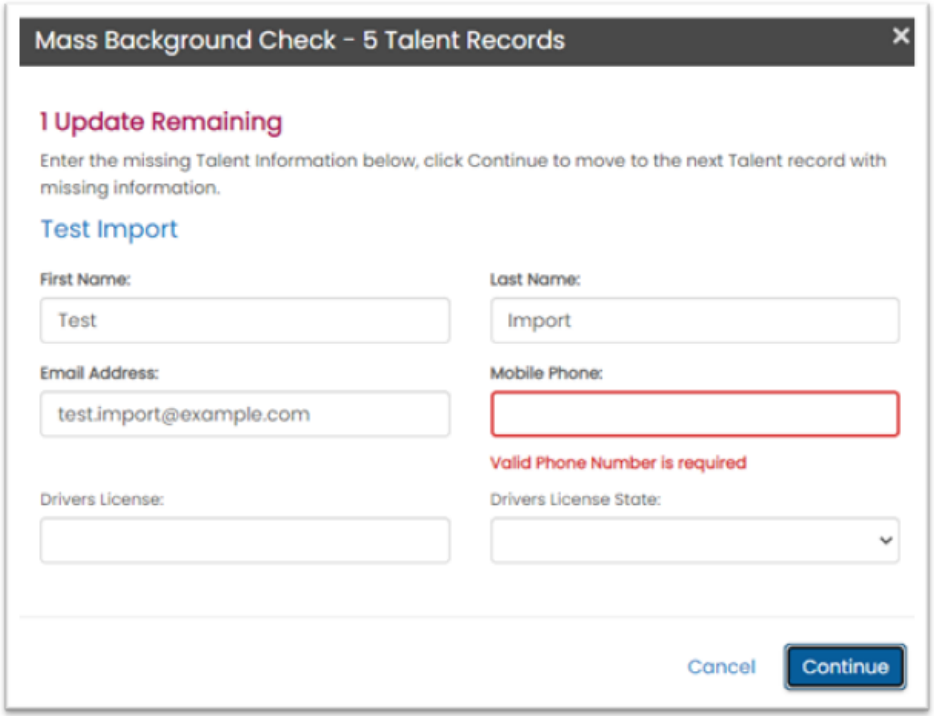

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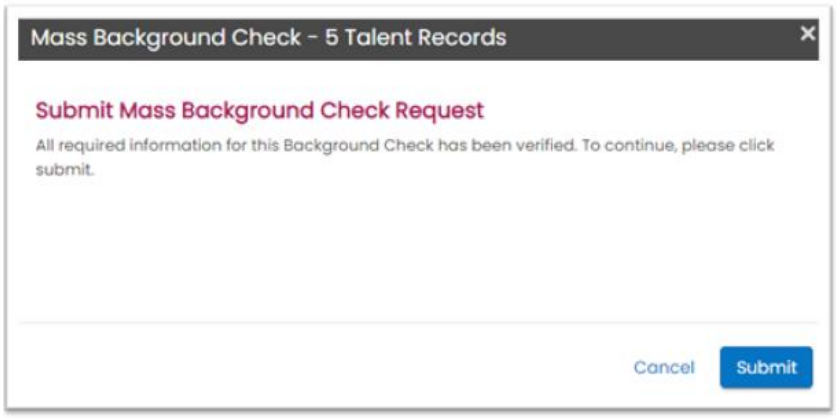

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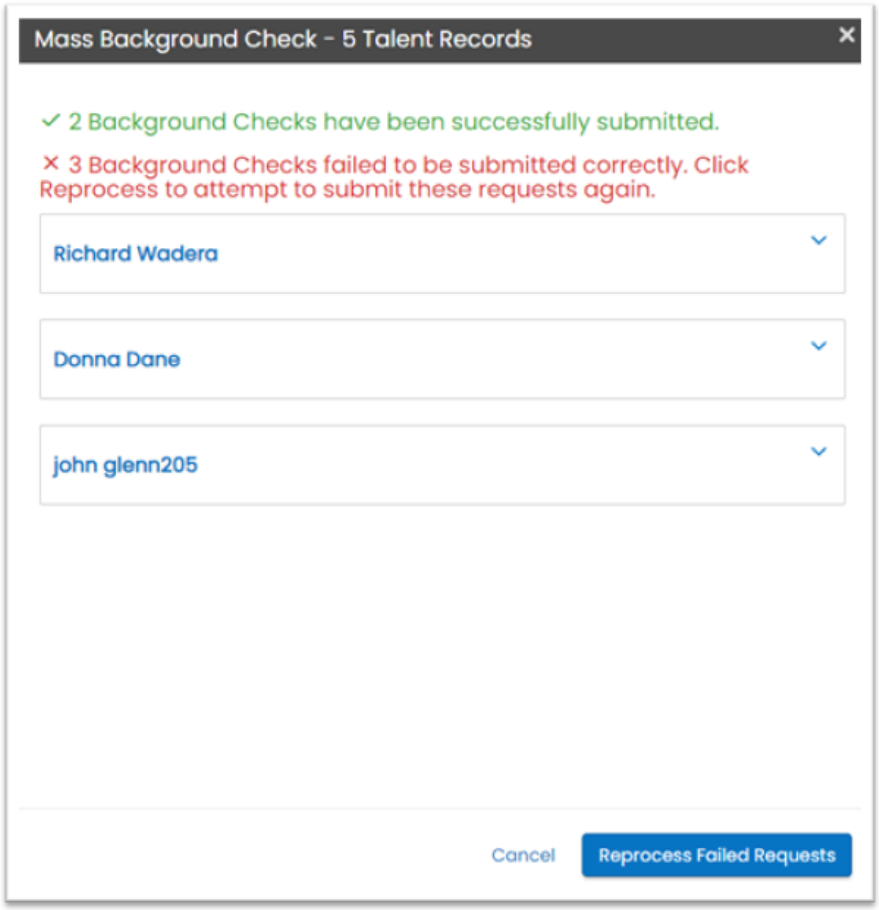

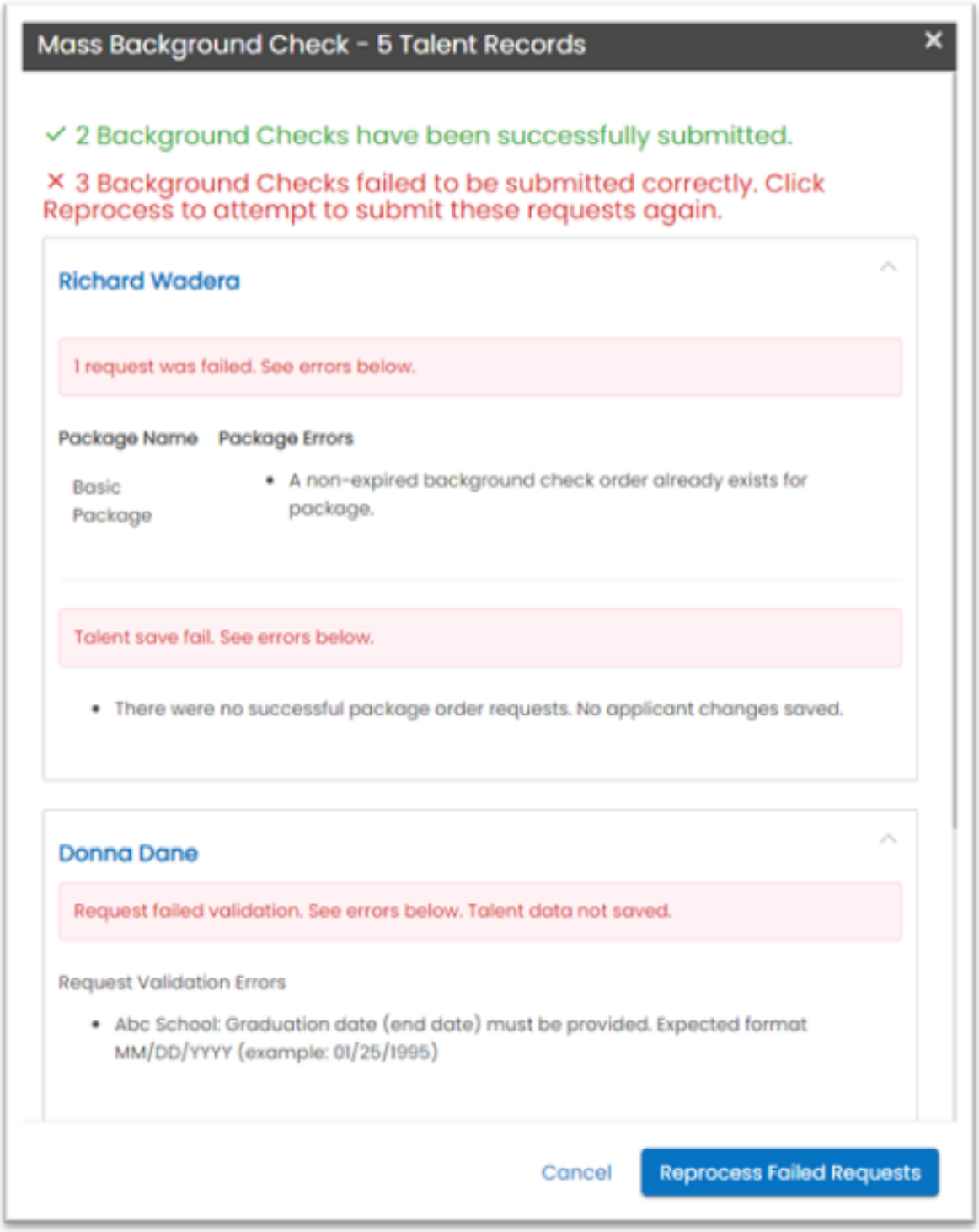
Mass Background Check - 5 Talent Records
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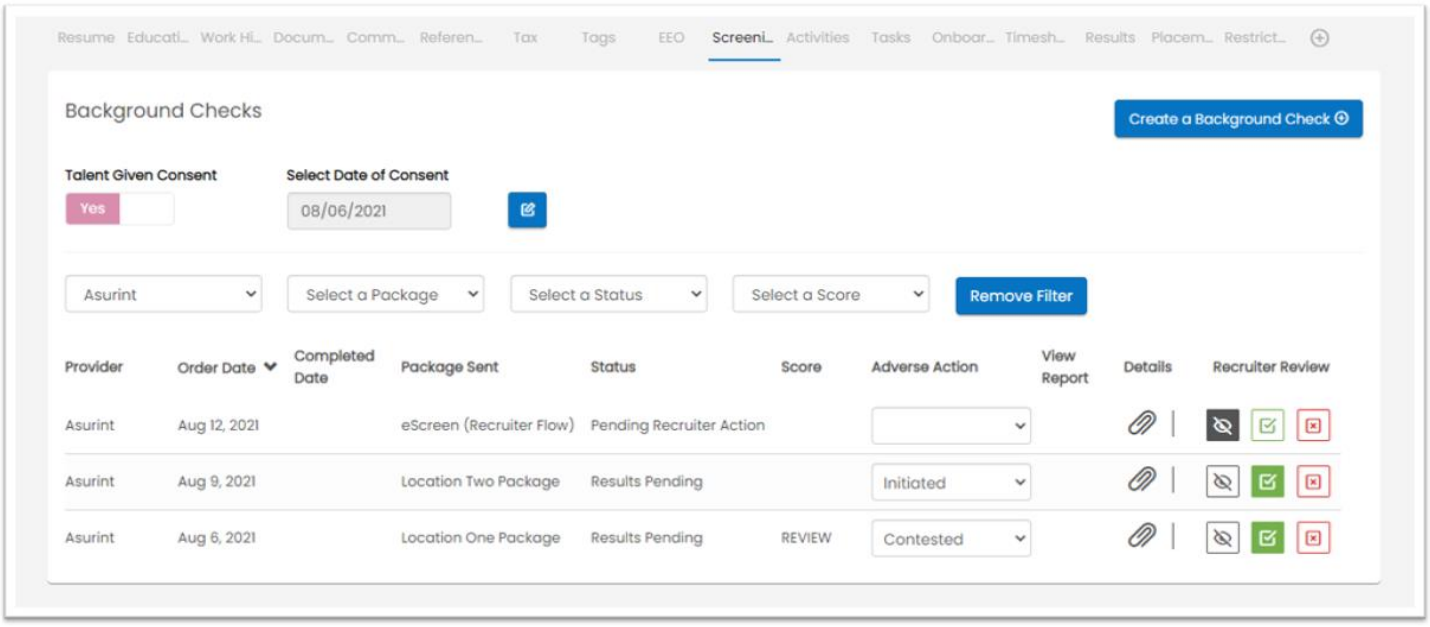
Donna Dane
Request failed validation. See errors below. Talent data not saved.
Request Validation Errors
Abc School: Graduation date (end date) must be provided. Expected format MM/DD/YYYY (example: 01/25/1995)
Cancel
Reprocess Failed Requests

Background Check Management

There are a few tools to help you manage your background checks and results efficiently so you can place talent on jobs quickly.

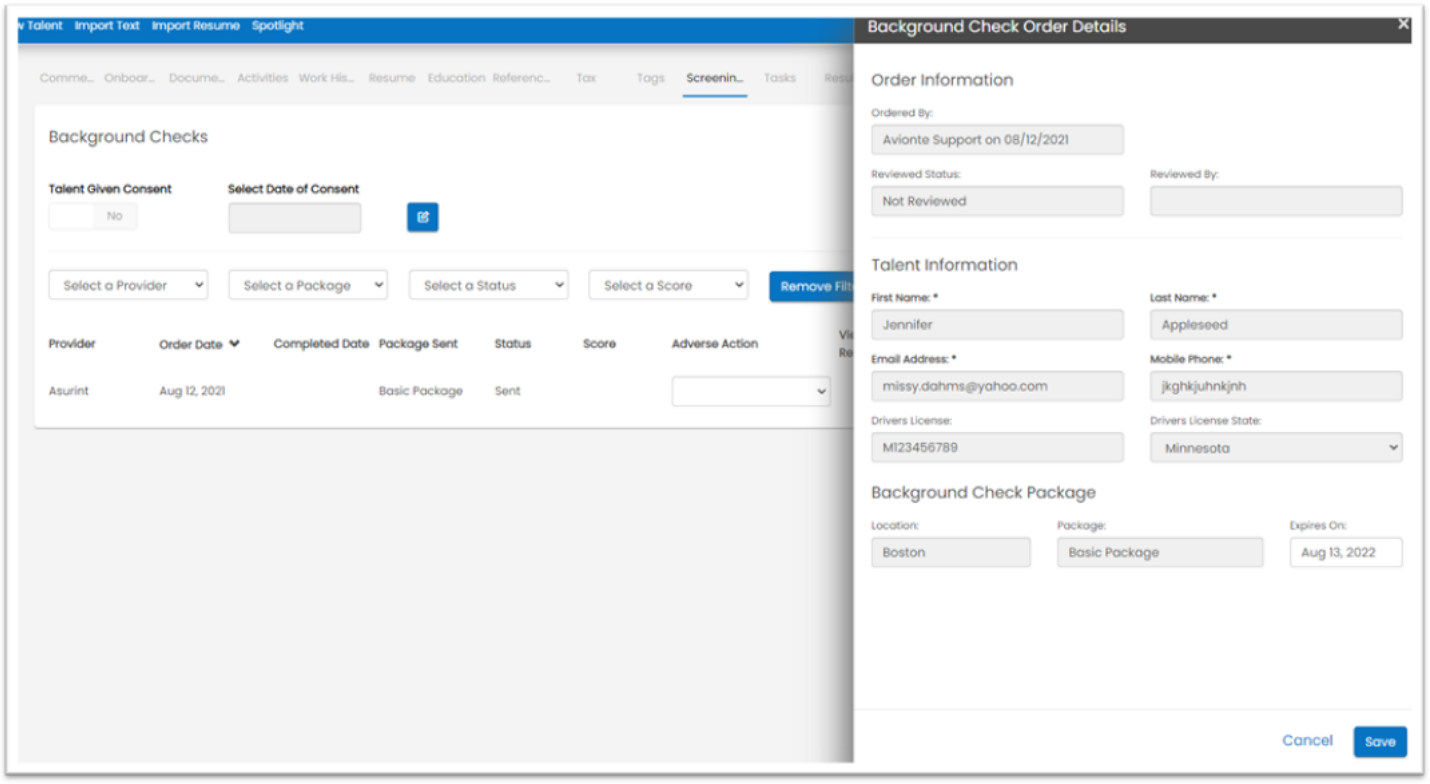
Talent Screening Page

Once a background check is ordered, it will be added to the Talent > Screening page.



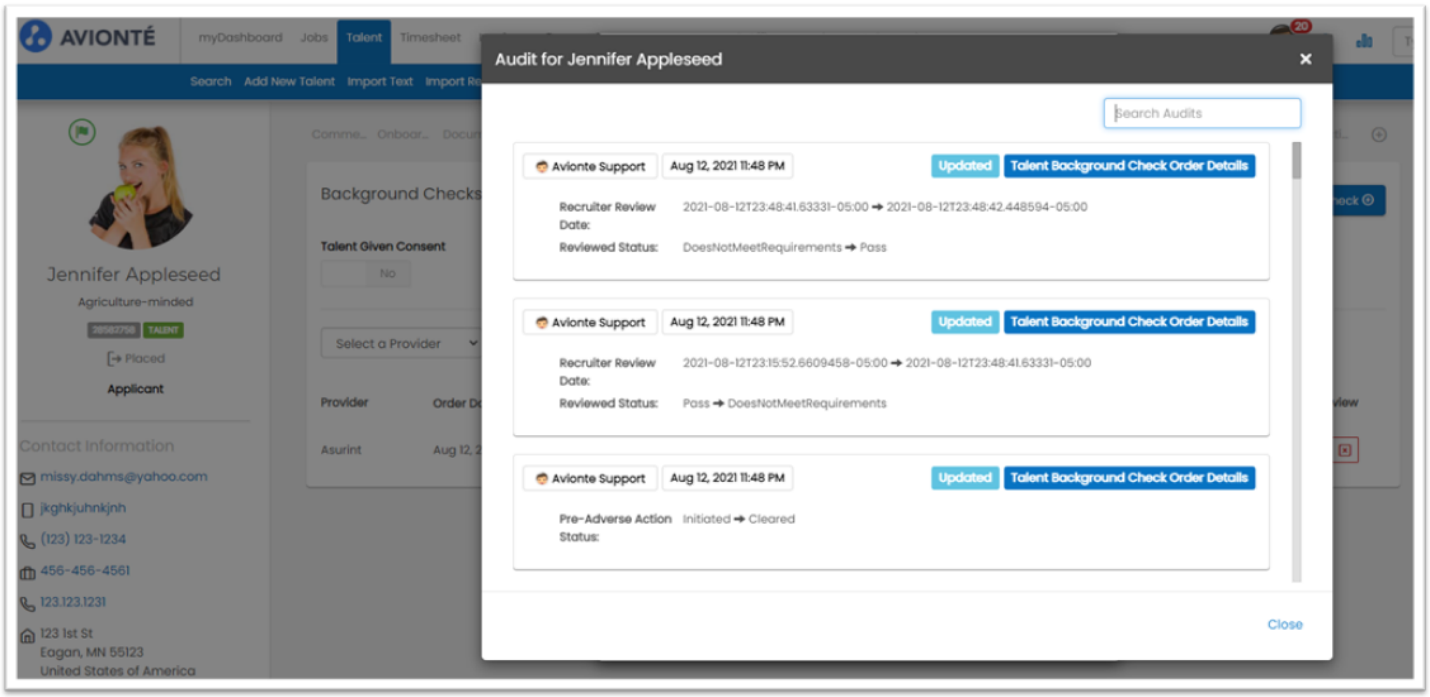
Features & Field Definitions

Field	Description
Consent Fields	Used to indicate if the talent completed a background check consent form If the Marketplace consent setting is set to Staffing Company and the Talent Given Consent field is set to No, the Create a Background Check button will be greyed out
Table Filters	Allows you to filter the orders by provider, package, status, & score
Provider	Displays the provider the background check was ordered through
Order Date	Date the background check was ordered
Completed Date	Date results are received from Asurint
Package Sent	Name of package ordered
Status	Current state of the order Status Values: Sent, Pending Signed Consent, Pending Talent Action, Pending Recruiter Action, Results Pending, Completed
Score	Custom score value sent back from Asurint
Adverse Action	Dropdown field that allows for manual tracking of the pre-adverse action status of an order Status Values: Initiated, Contested, Cleared, Adverse Action
View Report	Gives the user access to the detailed results on Asurint's site Report button will be displayed once results are received from Asurint User will only be able to view the report if they have the proper access through their account with Asurint
Details Button	Displays additional order information
Expires On	Displays the date the order will expire on Once the expiration date is passed, the package can be ordered again for that talent Date can be edited if needed
Recruiter Review	Status Values: Not Reviewed, Meets Requirements, Doesn't Meet Requirements Automatically set to Meets Requirements if the score sent back from Asurint is "Passed" Automatically set to Doesn't Meet Requirements if the score sent back from Asurint is "Failed"



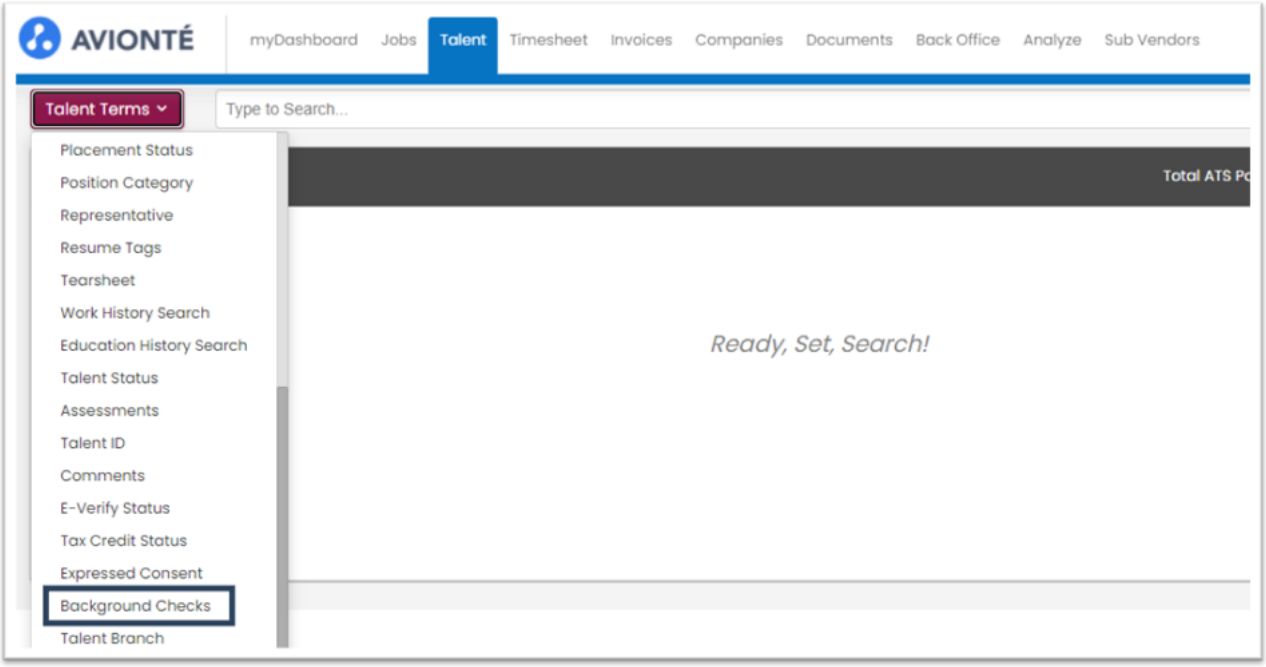
Talent Audit

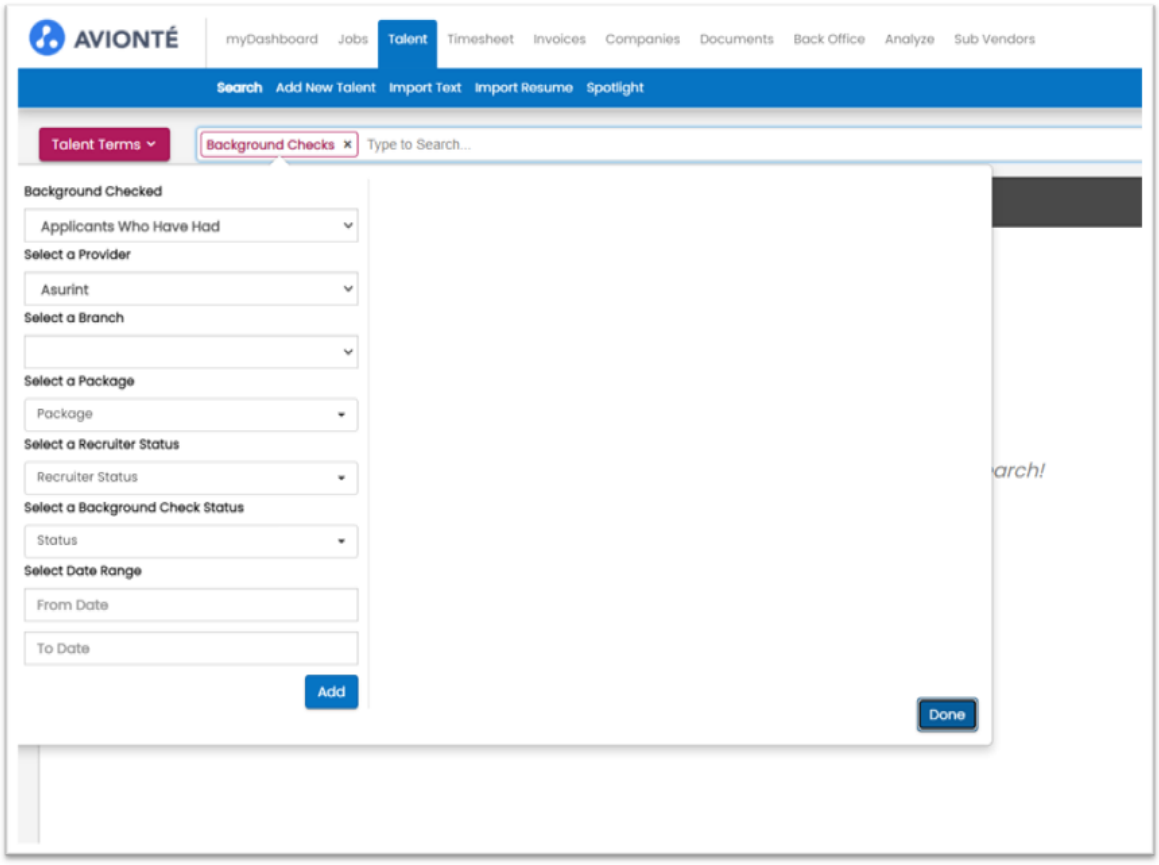
Changes made to the background check order from either the user or Asurint, are tracked in the talent audit.



Talent Search Terms

Background Check search terms have been added to BOLD. The search terms allow you to perform AND OR searches to find the right



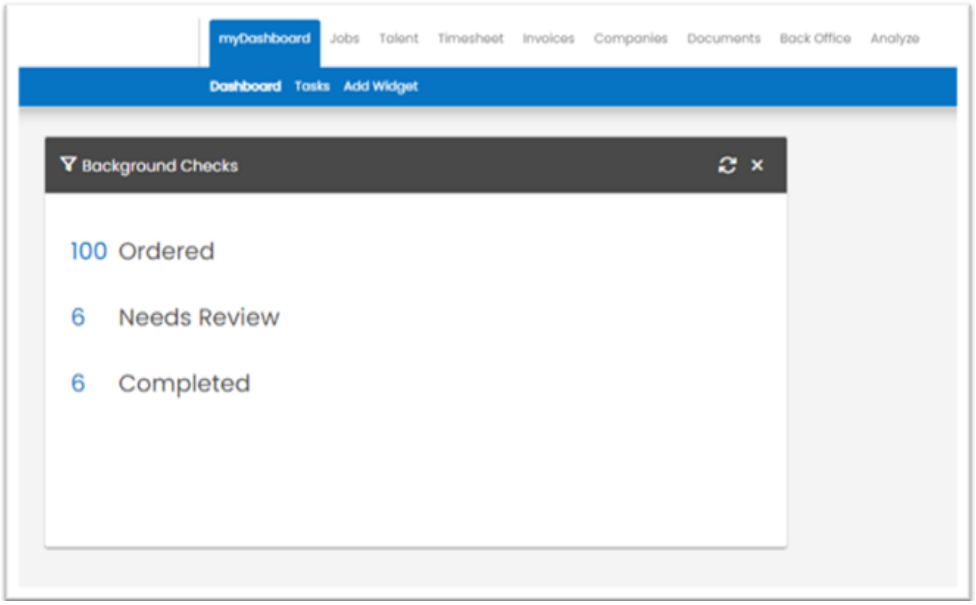


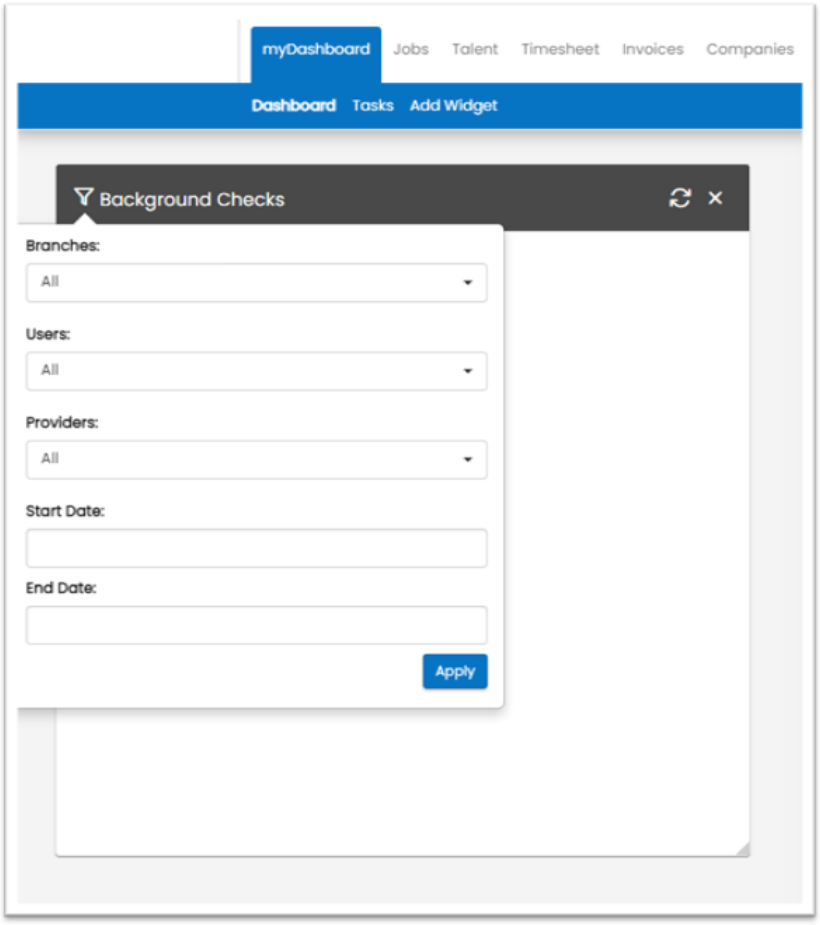
Search Term Options

Search Term	Value Options	Use Case	Type
Background Checked	Applicants Who Have Had	Used to find talent who have had a background check	Single-select list
	Applicants Who Haven't Had	Used to find talent who haven't had a background check	
Provider	Background check provider(s) that are enabled	Used to find talent who have or haven't had background checks for a specific provider	Single-select list
Branch	Offices with Asurint location IDs configured in the Marketplace	Used to find talent who have or haven't had background checks for a specific office	Multi-select list
Package	Available packages	Used to find talent who have or haven't had background checks for a specific package	Multi-select list
Recruiter Status	Not Reviewed Meets Requirements Does Not Meet Requirements	Used to find talent who have or don't have background checks in a specific recruiter review status	Multi-select list
Background Check Status	Sent Pending Signed Consent Pending Talent Action Pending Recruiter Action Results Pending Completed	Used to find talent who have or don't have background checks in a specific order status	Multi-select list
Date Range	From Date To Date	Used to find talent who have or don't have background checks ordered within a certain date range	Date

Background Check Widget

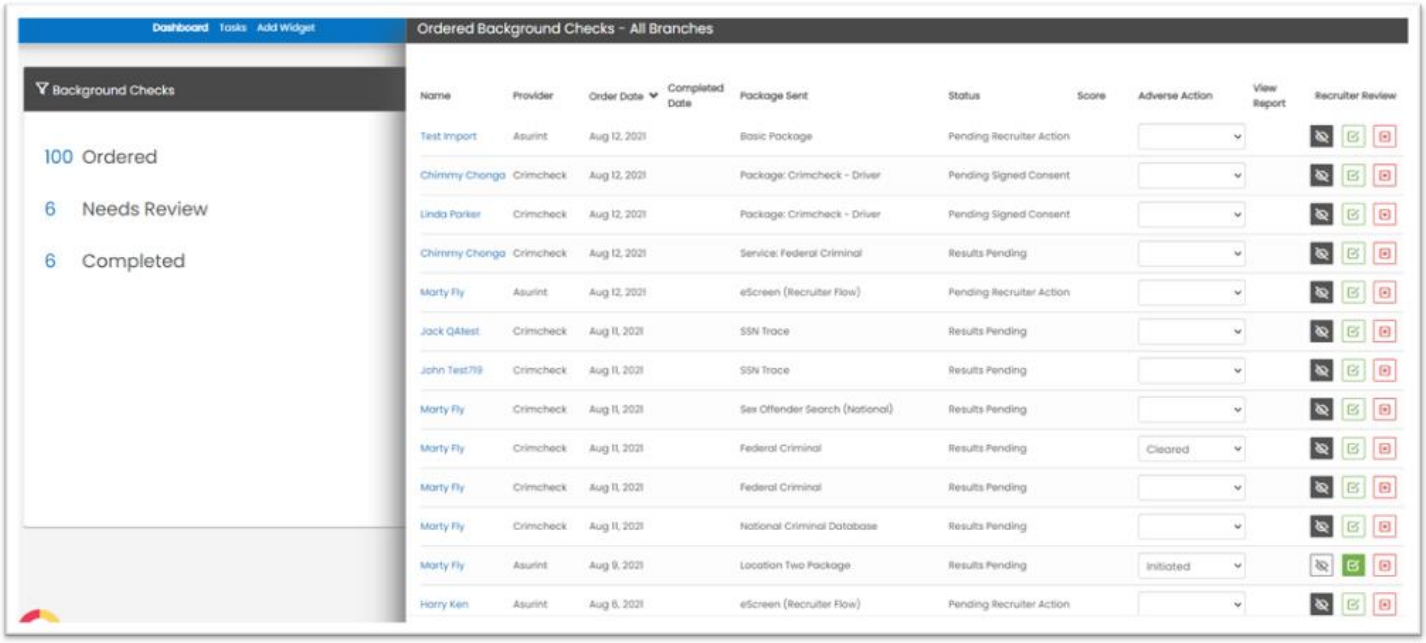
The background check widget can be used to manage the open background check orders, orders with results that need to be reviewed, and completed orders.





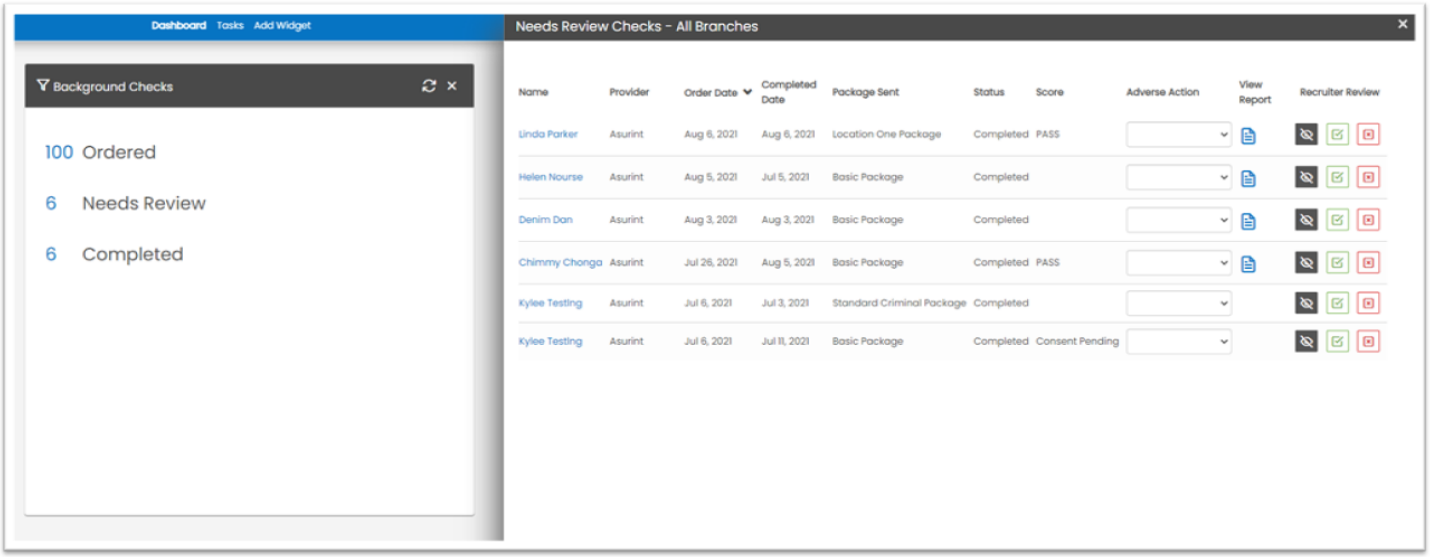
Ordered

Background checks that have been ordered and are pending results back from Asurint.



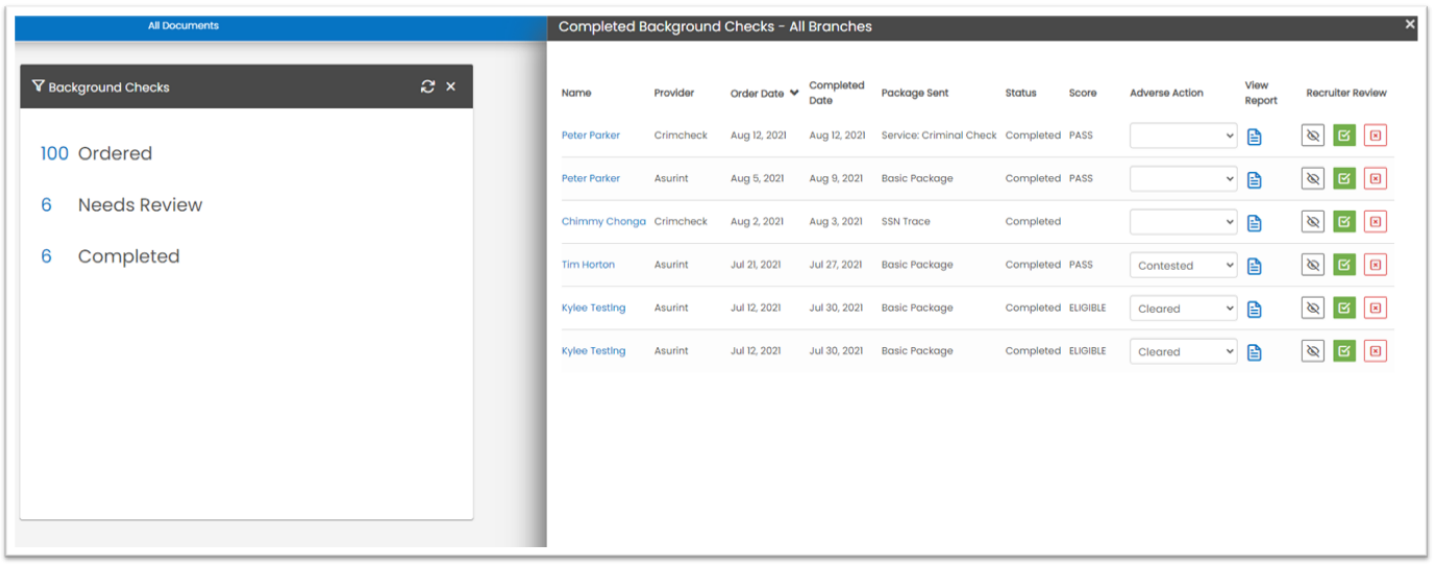
Needs Review

Background checks that have been ordered, where we've received results back from Asurint that need to be reviewed.



Completed

Background checks that have results back and they've been reviewed.



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