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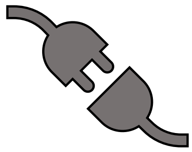
Access Screening API V2.0 Guide



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What is Access Screening's New V2.0 API?

We are thrilled to introduce the launch of our New V2.0 API, the solution that revolutionises pre and post background screening for SaaS products. This powerful tool empowers businesses to integrate comprehensive background screening capabilities seamlessly into their existing software, enabling them to make informed decisions and maintain a safe and secure environment for their users.

With its expanded endpoints and advanced functionality, The API empowers businesses to seamlessly integrate candidate information from third-party products directly into their background check screening candidate form, revolutionising the screening process and enhancing efficiency like never before.

Our API is designed to meet the evolving needs of businesses by offering a comprehensive suite of endpoints, providing unparalleled flexibility and customisation options. With more endpoints than ever before, businesses can tailor their background screening process to suit their specific requirements, ensuring a seamless and efficient experience for both administrators and candidates.

This API simplifies the background screening process by providing a unified interface for SaaS products, eliminating the need for manual workflows and tedious data transfers. Now, businesses can effortlessly incorporate thorough background checks into their software, ensuring a streamlined user experience without compromising on security.

What are the Key Benefits of V2.0 API and why is it important!

One of the key features of V2.0 API is its ability to push candidate information from third-party products directly into the background check screening candidate form. This functionality eliminates the need for manual data entry, streamlining the process and reducing the risk of errors. By seamlessly integrating candidate information, businesses can accelerate the screening process, allowing them to make faster, more informed decisions.

Key Features of Access Screening V2.0 API:

1. ***Seamless Integration:*** API seamlessly integrates into any SaaS product, eliminating the need for time-consuming development efforts. The simple and intuitive API allows businesses to quickly implement robust background screening capabilities.
2. ***Expanded Endpoints:*** With a comprehensive suite of endpoints, the API offers flexibility and customisation options, allowing businesses to tailor their background screening process to their specific needs.
3. ***Advanced Integration Capabilities:*** The API enables businesses to seamlessly integrate candidate information from third-party products directly into the background check screening candidate form, streamlining the process and reducing the risk of errors.

4. ***Enhanced Efficiency:*** By eliminating the need for manual data entry, Access Screening API accelerates the screening process, enabling businesses to make faster, more informed decisions.

5. ***Improved Accuracy:*** With advanced integration capabilities, the API ensures that candidate information is transferred accurately and securely, minimising the risk of errors and discrepancies.

6. ***Seamless User Experience:*** Access Screening API provides a seamless and intuitive user experience, making it easy for administrators to navigate and configure the system according to their needs.

7. ***Comprehensive Screening Options:*** Businesses gain access to a wide range of screening options, including criminal records, employment verification, education verification, credit checks, and more. This comprehensive suite of screening services ensures that businesses can make well-informed decisions when onboarding new candidates.

8. ***Reliable and Accurate Results:*** The API leverages advanced technology and extensive data sources to deliver reliable and accurate screening results. Businesses can trust the results they receive, enabling them to make confident decisions and maintain a safe environment for their users.

9. ***Compliance and Security:*** Our API is designed with security and compliance in mind. It adheres to industry standards and best practices to ensure the privacy and confidentiality of user data. Businesses can rest assured that their screening process is conducted securely and in accordance with legal regulations.

What candidate data can be transferred to the Screening Candidate form?

Screen quicker, Candidates will not be obligated to re-enter personal information, referee details, or any pertinent documents already submitted that are essential for the screening process.

The benefit of this approach is that it saves candidates time and effort. By not requiring them to duplicate information they've already provided, it streamlines the screening process, and enhances the overall candidate experience. Additionally, it demonstrates respect for the candidates' time and ensures that the screening process is efficient and effective. Overall, it can contribute to a more positive impression of your organisation and improve the likelihood of attracting and retaining top talent.

Please see below candidate information that can be passed to the candidate form for the screening process. We have also included field validation information we have in the screening product to ensure accuracy of the candidate information.
You can transfer the candidate data when you start the Background Check from your third-party product.

Candidate Personal Information:

Section - Candidate Name and Address		
Front End Field Name	**Field name API docs**	**Field Validation**
Contact number	contact_number	Must be 11 digits long
National Insurance Number	n_i_number	[A-Z][A-Z][0-9][0-9][0-9][0-9][0-9][0-9][A-Z]
Nationality	nationality	Dropdown list with Nationalties
Date of birth	date_of_birth	DD/MM/YYYY
Gender	gender	Male or Female

Candidates Current and Previous Addresses:

Section - Add Candidate Address (Current and Previous addresses)		
Front End Field Name	**Field name API docs**	**Field Validation**
Line 1	line_1	Can only contain the following: (A-Z) (0-9) (spaces) (' - & / () , .)
Line 2	line_2	Can only contain the following: (A-Z) (0-9) (spaces) (' - & / () , .)
Post town	post_town	Dropdown list with Towns
County	county	Dropdown list Countys
Post code	post_code	A1 1AA A11 1AA AA1 1AA AA11 1AA A1A 1AA AA1A 1AA
Country	country	Dropdown list with Countrys
From date	from_date	DD/MM/YYYY
To date	to_date	DD/MM/YYYY
Current	to_present	Tick box
Address type	address_type	Dropdown list congifured by customer

Candidates Employment reference details:

Employment Reference		
Section - Step 1 of 3 Details of your Employment		
Front End Field Name	**Field name API docs**	**Field Validation**
(Reference) Provided by Candidate Organisation	organisation	No validation as free text box
(Reference) Provided by Candidate Department	department	No validation as free text box
(Reference) Provided by Candidate Position	position	No validation as free text box
(Reference) Provided by Candidate Reason for leaving	notes	No validation as free text box
Section - Step 2 of 3 Employment Dates		
(Reference) Provided by Candidate start date FROM	start_date	DD/MM/YYYY
(Reference) Provided by Candidate end date TO	end_date	DD/MM/YYYY
Current Tick Box		Tick box
Section - Step 3 of 3 Referee Details		
Referee name (Referee Details)	name	No validation as free text box
Referee email address (Referee Details)	email	Must be an email address - must have @
Referee contact number (Referee Details)	contact_number	No validation as free text box
Referee organisation (Referee Details)	organisation	No validation as free text box
Referee department (Referee Details)	department	No validation as free text box
Referee position (Referee Details)	position	No validation as free text box
Referee address	postal_address	No validation as free text box
DNC ticked	do_not_contact	Tick box
DNC reason	do_not_contact_reason	Dropdown with pre-configured options or selecting 'Other', the candidate can type into the field provided

Candidates Academic reference details:

Academic Reference		
Section - Step 1 of 3 Details of your Qualification		
Front End Field Name	**Field name API docs**	**Field Validation**
Insitution	organisation	No validation as free text box
Referee department (Referee Details)	department	No validation as free text box
(Reference) Provided by Candidate Course studied	course_studied	No validation as free text box
(Reference) Provided by Candidate Grade acheieved	grade_achieved	No validation as free text box
Section - Step 2 of 3 Qualification Dates		
(Reference) Provided by Candidate start date FROM	start_date	DD/MM/YYYY
(Reference) Provided by Candidate end date TO	end_date	DD/MM/YYYY
Current Tick Box		Tick box
Section - Step 3 of 3 Referee Details		
Referee name (Referee Details)	name	No validation as free text box
Referee email address (Referee Details)	email	Must be an email address - must have @
Referee contact number (Referee Details)	contact_number	No validation as free text box
Referee Institution name (Referee Details)	organisation	No validation as free text box
Referee department (Referee Details)	department	No validation as free text box
Referee position (Referee Details)	position	No validation as free text box
Referee address	postal_address	No validation as free text box
DNC ticked	do_not_contact	Tick box
DNC reason	do_not_contact_reason	Dropdown with pre-configured options or selecting 'Other', the candidate can type into the field provided

Candidates Personal reference details:

Personal Reference		
Section - Add Activity		
Front End Field Name	**Field name API docs**	**Field Validation**
Referee name (Referee Details)	name	No validation as free text box
Referee email address (Referee Details)	email	Must be an email address - must have @
Referee contact number (Referee Details)	contact_number	No validation as free text box
Referee position (Referee Details) OCCUPATION	position	No validation as free text box
Referee period known (Personal reference)	period_known	Dropdown list with 1 year, 2 years, 3 years, 4, years and 5+ years)
Referee relationship to referee (Personal reference)	relationship	No validation as free text box
Referee address	postal_address	No validation as free text box
DNC ticked	do_not_contact	Tick box
DNC reason	do_not_contact_reason	Tick box

Documents candidates have provided which are required for their screening checks:

Section - Document Type (Candidate Requested Documents - Candidate Portal)		
Front End Field Name	**Field name API docs**	**Field Validation**
Document Type	name	Must be .png, .jpg, .jpeg, .pdf
Has Expiry Date (True/False)	has_expiry_date	DD/MM/YYYY

Candidates Passport and Driving Licence documents and data required for their disclosure checks:

Section - Third Party Checks DBS and DS checks - Passport Details and Document		
Front End Field Name	**Field name API docs**	**Field Validation**
Document Type - Upload Passport copy	name	Must be .png, .jpg, .jpeg, .pdf
Number (passport number in the Disclosure Identity Details section)	number	Must be letters and numbers - no special characters
Type (candidate DL type in the Disclosure Identity Details section)	licence_type	2 options - paper or photo
Issue Date (passport issue date in the Disclosure Identity Details section)	issue_date	DD/MM/YYYY
Expiry Date (passport expiry date in the Disclosure Identity Details section)	expiry_date	DD/MM/YYYY
Nationality (candidate nationality in the Disclosure Identity Details section)	nationality	Dropdown list with Nationalties
Date of birth (candidate DOB in the Disclosure Identity Details section)	date_of_birth	DD/MM/YYYY

Section - Third Party Checks DBS and DS checks - Driving Licence Details and Document		
Front End Field Name	**Field name API docs**	**Field Validation**
Document Type - Upload DL copy	name	Must be .png, .jpg, .jpeg, .pdf
Number (candidate DL number in the Disclosure Identity Details section)	number	16 - 18 characters only The characters from sixth to eleventh should be numbers that represents your date of birth. The twelfth character should be the initial of your first name. DThe thirteenth character should be the initial of your middle name. If candidate doesn't have a middle name, the thirteenth character will be a number 9. The first five characters should be the first five letters of candidate surname. If candidate surname has fewer than five letters, the remaining spaces should be made up using the number 9
Valid From (candidate DL valid from date in the Disclosure Identity Details section)	valid_from	DD/MM/YYYY
Valid To (candidate DL valid to date in the Disclosure Identity Details section)	valid_to	DD/MM/YYYY
Country of issue (candidate DL country of issue details in the Disclosure Identity Details section)	country_of_issue	Dropdown with countries
Date of birth (candidate DOB in the Disclosure Identity Details section)	date_of_birth	DD/MM/YYYY

LET'S GET YOU STARTED!

Recommended minimum 'Lite Screening Integration'

Access Screening API | Access Screening API (screeningdevops.co.uk)

Overview:

The integration allows a flow of data relating to candidate screening checks to feed into your 3rd party application (e.g. CRM/ATS). It is an automated process.

Please note that you will need to have access to the Access Screening platform for the integration to work.

Running a Background Check and Seeing the Results:

Your 3rd party application will be used to initiate a background check, where you will need to submit the following information:

Brand and Workflow (mandatory):

- Brand - Organisational unit for configuration and data segmentation, which is often setup as Customers or Business Units.
- Workflow - Definition of a compliance process which is assigned to a Brand and aligns to specific roles, or levels of screening.

Candidate Information (at a minimum):

- Title (optional)
- First Name (mandatory)
- Last Name (mandatory)
- Email Address (mandatory)
- Tags (if mandatory in a workflow)

Operator Information (mandatory):

- Operator Email Address – This is to map your users in your 3rd party application to the Access Screening system, so in Access Screening the correct operator will be assigned to the background check.

This information will be sent to the Screening platform and an email will automatically be sent to the candidate to complete the required compliance within the candidate portal.

The following endpoint is used to create a new background check record in the system, using the values detailed above.

POST – CREATE A NEW BACKGROUND CHECK

URL:

/api/public/background-checks/

AUTHORIZATIONS:

tokenAuth

REQUEST BODY SCHEMA: application/json

title	TitleEnum (string) or BlankEnum (any)
first_name required	string

last_name required	string
email required	string <email>
brand_uuid required	string <uuid>
workflow_id required	string
your_reference required	string
tags	Array of objects (Tag)

Please note, the user must exist in Access Screening for the user mapping to work.

Once the checks have been run and verified by the operator in Access Screening and the Background check has been Completed, the integration can automatically pull results back into your third-party application including the Background Check PDF Report.

The following endpoint is used to retrieve the details of a background check record in the system, using the record's UUID.

GET – BACKGROUND CHECK DETAIL

URL:

/api/public/background-checks/{background_check_uuid}/

AUTHORIZATIONS:

tokenAuth

PATH PARAMETERS

background_check_uuid required	string <uuid>

QUERY PARAMETERS

include_fields	string A csv of fields to include. Valid options are • `actions` • `stages` • `candidate` • `references` • `questions` • `supplied_documents` • `attachments` • `tags` • `datachecks`

Please note, the Background Check Standard PDF Report cannot be pulled back for the statuses Waiting for Candidate, Stopped and Purged.

The following endpoint is used to generate a PDF report for a record in the system, using the record's UUID.

POST – GENERATE PDF REPORT

URL:

/api/public/report/{background_check_uuid}/render/

AUTHORIZATIONS:

tokenAuth

PATH PARAMETERS

background_check_uuid required	string <uuid>

REQUEST BODY SCHEMA: application/json

report_type required	string (BackgroundCheckReportRequestReportTypeEnum) Enum: "short" "standard" "candidate summary" • `short` - short • `standard` - standard • `candidate summary` - candidate summary

Once created, the following endpoint is used to find the PDF report's URL to enable downloading, using the record's and PDF's UUID

GET – FETCH PDF REPORT

URL:

/api/public/report/{background_check_uuid}/fetch/{task_uuid}/

AUTHORIZATIONS:

tokenAuth

PATH PARAMETERS

background_check_uuid required	string <uuid>
task_uuid required	string <uuid>

'Track and Manage' your screening background checks in your own dedicated dashboard.

Creating a dedicated dashboard within an Applicant Tracking System (ATS) or CRM to retrieve statuses from your integration offers several benefits:

1. Centralised Monitoring: With a custom dashboard, users can conveniently track the status of background checks from within the ATS/CRM interface. This centralised approach enhances efficiency by eliminating the need to switch between multiple systems or platforms.

2. Real-time Updates: The dashboard can provide real-time updates on the progress of background checks, allowing users to promptly address any issues or delays that may arise. This ensures that hiring processes remain on track and enables timely decision-making.

3. Enhanced Transparency: By providing visibility into the background check process, the dashboard promotes transparency and accountability. Hiring managers and recruiters can easily access up-to-date information on candidate screenings, fostering trust and confidence in the hiring process.
4. Compliance and Audit Trail: A dedicated dashboard can help ensure compliance with relevant regulations by providing an audit trail of background check activities. This feature enables organizations to demonstrate adherence to legal requirements and internal policies, mitigating potential risks associated with hiring.

'Track and Manage' the following statuses via your own Dashboard:

Statuses can be surfaced using the **GET Background Check Detail** endpoint detailed earlier, using the relative 'include_fields' query parameter detailed below against each status.

Background Check Status

The Background check will move through several statuses depending on how the workflows is configured. You can show real time updates on your dashboard, please see below all the statuses.

No 'include_fields' parameter is required for the Background Check Status to display in the endpoint results.

Background Check Status = {"status": "string"}

BACKGROUND CHECK STATUS		
Field name	**Public name**	**Description**
new	Waiting for Candidate	Waiting for the candidate to submit the candidate portal
await_dci	Awaiting Data Check Input	Candidate has submitted candidate portal BUT Waiting for candidate to submit 3rd party portal checks
ref_ns	Referencing Not Started	Candidate has submitted candidate portal BUT Waiting for Operator to start referencing process
open	In Progress	Candidate has submitted candidate portal and the background check in now in progress
app_wait	Awaiting Approval	Once the final criteria have been satisfied, the Background Check changes from its current status of In Progress to the Awaiting Approval status, this then allows authorised users to be able to accept/reject the references/documents
await_fso	Awaiting Final Sign Off	If enabled at workflow level this will stop Background Checks from automatically advancing to a Complete status once references have been submitted and approved, documents have been accepted/rejected and all required checks have finished. Requires relevant operator to complete the BC
closed	Completed	Background Check has been completed by the Operator/System
stopped	Stopped	Background Check has been stopped by the Operator
archived	Archived	Background Check has been archived by the Operator/System
purged	Purged	Background Check has been purged by the Operator/System

Data Check Status

If you have Data checks enabled on your workflow they will move through several statuses. You can show real time updates on your dashboard, please see below all the statuses.

*'include_fields' parameter **datachecks** is required for the Data Check Status to display in the endpoint results.*

Data Check Status = {"datachecks": [{"status": "string"}]}

DATACHECK STATUS		
Field name	**Public name**	**Description**
operator	Waiting for Operator	Candidate has provided relevant information for the check NOW waiting for the operator to carry out their required activities
pending	Pending	All details for the check has been submitted by both the candidate and the operator and the check in in progress
success	Completed	Data Check has been successfully completed
failed	Failed	Data Check has failed needs operator attention
screening	Manual International Checks	Data check requires processing by Screening staff

Reference Status

If you have Referencing enabled on your workflow, you can show real time updates on your dashboard, please see below all the statuses.

*'include_fields' parameter **references** is required for the Reference Status to display in the endpoint results.*

Reference Status = {"references": [{"status": "string"}]}

REFERENCE STATUS		
Field name	**Public name**	**Description**
accepted	Accepted	Reference has been accepted by the operator
altered	Altered	Reference has been altered by referee and operator has accepted the altered information
rejected	Rejected	Reference has been rejected by the operator
abandoned	Abandoned	Referee has not responded to the reference request
declined	Declined	Referee has declined to give a reference for the candidate
altered?	Altered	Reference has been altered by the referee
do_not_contact_reason	DNC reason	Reason candidate has given for not contacting the referee
do_not_contact	DNC ticked	If the candidate has put Do Not Contact for a reference

Disclosure Status

If you have configured Disclosure checks on your workflow, you can show real time updates of the status of your check on your dashboard, please see below all the statuses.

*'include_fields' parameter **datachecks** is required for the Disclosure Status to display in the endpoint results.*

Disclosure Status = {"datachecks": [{"data": {"status": "string"}}]}

DISCLOSURE CHECK STATUS		
Field name	**Public name**	**Description**
success	Completed	Disclosure completed
withdrawn	Withdrawn	Disclosure withdrawn
results-available	Result Recorded	Disclosure with staff results recorded and not update service
verified	Verified	Disclosure with operator results recorded and not update service
countersigned	Countersigned	Disclosure countersigned and not update service
pending	Pending	Disclosure pending (if not any of the above)
failed	failed	Disclosure failed

Documents Status

If you are requesting documents from your candidate, you can show the document name and whether it has been accepted or rejected on your dashboard, please see below all the statuses.

*'include_fields' parameter **attachments** is required for the Documents Status to display in the endpoint results.*

Documents Name = {"attachments": [{"type": {"name": "string"}}]}

Documents Status = {"attachments": [{"status": "string"}]}

DOCUMENT TYPE		
Field name	**Public name**	**Description**
name	Document Type	Name of document you have requested from candidate
status	Status of the attachment	This is status of the attachment, dependant on whether the operator has accepted or rejected the attachment

The Transfer Process

It is recommended to create a service that will request status updates from the 'Background Check List' method(s) on a recurring basis at a minimum interval of every 30 minutes.

Archiving and Purging Background Checks

You can archive and purge background checks from your third-party application via the API. This will put your background checks in the 'Archived' or 'Purged' status in the Screening system.

POST – ARCHIVE BACKGROUND CHECK
URL:

/api/public/background-checks/{background_check_uuid}/archive/

AUTHORIZATIONS:

tokenAuth

PATH PARAMETERS

background_check_uuid required	string <uuid>

POST – PURGE BACKGROUND CHECK
URL:

/api/public/background-checks/{background_check_uuid}/purge/

AUTHORIZATIONS:

tokenAuth

PATH PARAMETERS

background_check_uuid required	string <uuid>

Please note, once a background check has been Archived or Purged, it is non-reversable.

How to configure the integration

You will need access to the Access Screening platform.

1. Please provide your on-boarding consultant/Screening support team with a list of IP addresses that need to be whitelisted for the API. We need to whitelist your IP addresses for security as it will lock it down to your network.

2. Once we have whitelisted the IP Addresses, we will create a new user called API User and make the API key available to the main point of contact via the Access Screening platform.

   The next steps will need to be completed by the main point of contact in the Screening platform:

   a. Go to Configuration > Users and Permissions > Edit (next to API User)
   b. Tick all the Brands you want to access via the API in the Brands section (Please note: If you add any new brands in the future that need to be accessed via the API, you will need to give the API user access to these brands
   c. Go to Configuration > Users and Permissions > Edit (next to API User)

   d. Go to the API Management section and you will see the following:

      IPs: This is a list of IP addresses you have provided which have been Whitelisted.
      Token: This is the API key which you can copy and paste into your third-party application

UAT & Switch To LIVE

If you are in implementation, all your testing will be conducted in your Demo Screening platform.
If you are Live, all your testing will be conducted in your Live Screening platform.

YOU ARE READY TO GO!

COMING SOON WEBHOOKS!

Webhooks in APIs solve several problems related to real-time communication and data synchronisation between different systems. Here are some key problems that webhooks address:

1. ***Event Notification:***

- **Problem:** Traditional APIs require clients to poll the server at regular intervals to check for updates or new information.
- **Solution:** Webhooks allow servers to push data to clients in real-time, notifying them of specific events without the need for constant polling.

2. ***Real-time Updates:***

- **Problem:** Some applications require real-time updates for timely actions or decision-making.
- **Solution:** Webhooks enable instant notifications and updates, ensuring that systems can react promptly to changes, events, or new data.

3. ***Reduced Latency:***

- **Problem:** Polling APIs can introduce latency, as clients may not receive updates immediately after they occur.
- **Solution:** Webhooks minimize latency by delivering data as soon as an event happens, eliminating the need for clients to repeatedly check for updates.

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4. ***Efficiency:***

- **Problem:** Polling APIs can lead to wasted resources, as clients may make unnecessary requests when there are no updates.
- **Solution:** Webhooks are more efficient, as they only send data when an event occurs, reducing the number of unnecessary requests and improving overall system efficiency.

5. ***Scalability:***

- **Problem:** Scalability can be a challenge when many clients need to poll a server for updates.
- **Solution:** Webhooks distribute the load more evenly by allowing servers to push updates to clients, making it easier to scale both the client and server components independently.

6. ***Automation and Integration:***

- **Problem:** In a connected ecosystem of applications, it's crucial to automate processes and integrate systems seamlessly.
- **Solution:** Webhooks facilitate automation by triggering actions in response to specific events, streamlining workflows and enhancing integration between different systems.

7. ***Customization:***

- **Problem:** Some clients may have specific requirements for the data they need or the format in which they receive it.
- **Solution:** Webhooks allow for more customized data delivery, as clients can subscribe to specific events and receive data in a format that suits their needs.

8. ***Security:***

- **Problem:** Polling APIs may expose sensitive information, especially if requests are made frequently.
- **Solution:** Webhooks can be designed with security in mind, allowing for secure communication by using authentication and encryption to protect the transmitted data.

Webhooks provide a more efficient, real-time, and scalable solution for handling event-driven communication between different applications or systems. They address the limitations of traditional polling-based approaches and contribute to a more responsive and integrated digital ecosystem.

Webhooks available for the following:

Background Check Status

Data Check Status

Reference Status

Disclosure Status

Documents

Passport Details

Driving Licence Details