Advanced Background Services Plugin

Requires 14.0 Rock RMS and above.

Overview

With the Advanced Background Services integration, users gain access to meticulous verification services covering a range of essential checks to help maintain compliance and make informed decisions. This integration ensures quick turnaround times for results without compromising on quality.

Leverage the power of this plugin to streamline and enhance your background check processes. Experience automated notifications, simplified profile updates, and customizable features tailored to your needs—all seamlessly integrated within Rock.

Functions

• **Update Packages and Credentials from Rock**
• **Automatically load Packages from Account**
• **Renew Requests from Rock**

Setup

After installing the plugin from the Rock shop, you'll need to do some basic setup to configure Rock to communicate with Advanced Background Services (ABS).
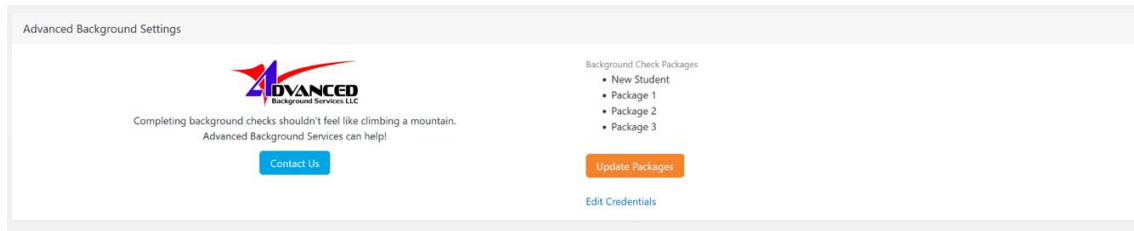
1. Navigate to your new plugin by going to **Admin Tools>System Settings>Advanced Background Services.**
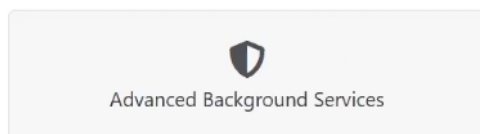
2. Add ABS credentials and validate them.

After adding credentials, ABS will indicate on the screen if your credentials were successfully validated. Click **Save**, and your background check packages will automatically load.

Your Rock database will now establish a secure connection with ABS, enabling communication and access to background check services. If you don't have an account with ABS, you can contact them from this page with the **Contact Us** button.

5. Enable the background check on the person profile block. In the Settings for Person Bio, add your workflow from the **Workflow Actions** dropdown.
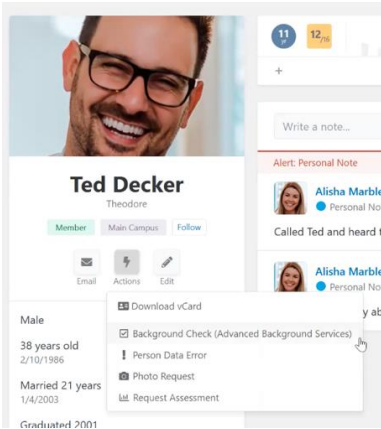

Usage

Once you've finished the setup instructions, you're ready to start requesting background checks through Rock.

To order a Background check:

1. From a person's profile, click the *Actions* icon and choose **Background Check (Advanced Background Services).**

2. The Background check workflow will start. The next screen will show you who you requested the background check for**.** There are two options for continuing with the check:

   a. Start the request by entering a Social Security Number that you have obtained permission to use. A request with a Social Security Number will go to ABS once it is approved by the background check administrator.

   b. Start the request without a Social Security Number. Once the request for a background check is approved by the administrator, ABS will send the person an email informing them a background check was requested, and they will handle the required permissions for advancing with the check.

   Note: The **Reason** text box on this form is an internal note to let your administrators know why the request is being submitted.

3. Once launched, the background check is passed to the security administrator for review. The administrator can then approve or deny the request, choose the type of background package, and enter any notes they want to send to the requestor. Approving the request will initiate the order of the background check from ABS.

4. Once the Background Check is completed, the administrator will receive an email notification that the request is ready for review. The email will include a link to the Background Request Details. From here, the administrator can review the report details and choose whether to pass of fail the check.

The requestor will receive an email notifying them if the result was a pass or fail. The person's Safety & Security attributes on their profile are updated automatically.

Administrator Management of Requests in Rock

Utilize the included **Cleared and Serving Report** to manage background checks:

a. From the **Installed Plugins>Advanced Security Services**, you can view the report. Filters allow you to search by date ranges and whether the person is in a serving group.

b. Relaunch background checks from this report by checking off one or more individuals and using the **Launch Workflow** icon and choosing the **Renew Background check** workflow Type.
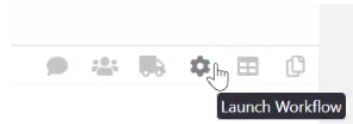
Under the Hood:

The Advanced Security Services plugin is powered by two workflows to keep your process running seamlessly. Here is more information about them:

1. **Background Check Workflows:** The background check workflow is responsible for handling the process of requesting background checks, updating lists, sending notifications, and updating attributes. It serves as the backbone of the background check functionality within Rock. The second workflow is the **Renew Background Check**, which runs the renewal process mentioned above.

2. **Customization Recommendation:** Depending on the processes of your organization, you may want to customize the workflow. We suggest you copy the original workflows rather than changing them directly.