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02/12/2025 Version 2.0



Bchex Support Document

1. Introduction of Bchex

We are an AI-enabled background screening company that delivers fast, accurate background checks with a conscience. Our screens are not just high-quality background screens, but we give every employer the ability to find out more truth about their future team members. At the intersection of Accuracy and Humanity is where you find the truth. We want to ensure every deserving candidate gets a chance at meaningful work and volunteer opportunities. This is us becoming part of the solution of a kinder and more productive world.

By bringing a sense of humanity to the screening experience, we keep people and their workplaces safe while creating opportunities for those who deserve it. This is hiring for humanity.

What do we offer:

Superior technology that ensures speed and accuracy. Using AI-powered, next-gen tech creates client confidence. Knowing they're using the newest tech makes them understand they're getting the best results.

Ease of use. Our technological solutions make the process easy for both applicants and customers.

Customer service. Our service ratings are among the best across many industries. Clients know that they will get immediate and comprehensive customer service.

A unique, context-focused approach. Our context-based hiring allows customers to get a real picture of their candidates, ensuring that they hire the right person for the right job.

2. How to enable integration

If you are connected with Bchex then simply ask Bchex to set up a Merge integration and set up a linked account through merge to your Teamtailor account.

You will need to provide:

- Administrative email
- Teamtailor API key (settings >Integrations>API keys)
- Data processing region

If you need steps on how to access this information, please view the Account Information section below.

Additional Requirements:

• Applicant Express enabled for your account through Bchex

This is handled through Bchex. You can reach out to Client Services if you need this enabled or are unsure if it is active for your account.

If you aren't associated with Bchex, then simply connect with Bchex and provide the information as mentioned above. The contact details for Client Support are given below.

Email ID : <u>clientservices@bib.com</u> Phone : 704-439-3900

3. Details regarding the integration

There is some required/mandatory job information needed for the background check; please see the steps below to ensure your platform is set up to run Bchex background checks.

- Background Check stage
- Packages custom field

Background Check stage creation:

Every job must have the Background Check stage to process. This should be added when creatin a new job post. You can also add it after creation if this step is missed.

Job Creation:

During your process of creating a job you will see stages in the left sidebar. Select it and navigate to the Add stage section. Click select stage, if you already have the Background Check stage select it. If not then type 'Background Check' and hit ENTER.

Candidates Content Analytics Promotions Employees	
< Back to jobs	
Job posting	Job posting
Application	Job ad title *
(III) Stages	
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(1) Interview scorecard	
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+ Stag	Cancel Add stage

Select which stage type you want the stage to fall under and click Add stage. You will be able to drag the stage to any part of your hiring process that you would like it to be located.

Package:

Packages are used to determine which type of background check will be processed for each job posting. Even if you only have one package for your account it will need to be selected for the job posting. The package will be combined with your Bchex comp code to ensure which account it belongs to. If you need assistance with your package options or comp code please contact client services.

1. Login your Teamtailor account with admin credentials. URL is as usual: https://app.teamtailor.com/ Screenshot given below

Sig	nın
Region	
EU (Ireland)	0
Email	
adminemail@domain.co	om
Password	
Sig	n in
Forgot password?	Log in using SSO

2. After logging in, you will find the dashboard screenshot given below.

7 Jobs Candidates Content Anal	lytics Promotions Employees						Q एः Ø	🕫 📼 ¢ 📑 ~ 📑 ~
	Good morning, Sandbo	oxes 🐣					ିକ୍ Widget library	
	My jobs		My to-dos				Product updates	
	TM AI/ML Engineer Test Department 1	(3 overdue)	testing to do testing to do				your preference in your account settings.	
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	[•] J Joseph's Test Job	29 unread	View all	to-dos 🕕				
	Senior Software Engineer The OP AF Department	39 unread						
	AihrScreen- Java developer The OP AF Department - Test Role	() 8mo	Upcoming meeting	5				
	S Software Engineer I	2 unread	February 2025					
	[®] T Test Public Job							
	Recent connects			12 13		15		
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3. At the top right corner find the Settings link under the dropdown. Please check the screenshot given below for reference.

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4. Under the Recruitment section in the sidebar select Custom fields.

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Q s	earch settings Company		Î		General				
	General Organization Locations				Company details Set the company name and industry.	Name Merge			
	Billing Auto join Security					Industry Nothing selected			
Q	Templates Employees Messages				Time Select the time zone and format that will be used	Time zone			
9	Jobs To-dos Job offers				across the ATS.	Time format 24 Hours			
æ [Groups Questions Ratings Custom fields Tag manager Poinct research				Language By default all users will use this language but users can override this with their preferred language.	Default language English (United States)			
8	Reject reasons Skills and traits Meeting rooms Apply with Content				ATS management Select who takes care of the different parts of the ATS.	Career site manager Sanoboves Merge Pick the primary recruiter as manager. The manager is the default sender of automatic replies sent to candidates.			_

5. Select the Jobs tab

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Company ^	1	Custom fields 🔟						
General Organization Locations Billing		Candidates 9 Jobs 1						+
Auto join Security	1	Remote status Show if your jobs are hybrid, fully remote or t		•	Salary Show what salary range car			
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Job offers			⊙ Select	Normal		21 Jan 2025		
Recruitment ^								
Groups								
Questions								
Ratings								
Tag manager								
Reject reasons								
Skills and traits								
Meeting rooms								
Apply with								

6. Select '+' to create a new custom field

Recruitment > Custom fields						
Custom fields 💿						
Candidates 9 Jobs 1						Q +
Standard fields						
Remote status Show if your jobs are hybrid, fully remote or t	emporarily remote.		Salary Show what salary range of	andidates can expect in this position.		
Employment type Add information about employment types like Custom fields		re to your jobs.	Employment level Add employment levels lik	e administrative, professionals, operatives and n		
Title	Field type	Visibility	Searchable	Created	Times used	
	Select	Normal		21 Jan 2025		

- 7. Create the Package custom field:
 - Field type: Select
 - Title: Package
 - Options This is where you will add your comp code Package list. If you have more than one comp code you will have to add the packages for each comp code.
 - Check Required

Click Add custom field and your custom Packages will now be available in your job posting.

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Standard fields	Steu		
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Custom fields	= DEF001-STANDARD		
	+ Add option		Times used
	Settings		
	Visible in job ad Candidates can view this type of field in job ads and on the Jobs page.		
	Required This field must be completed to add a job.		
	Do not show in internal filters Hides field from the job filters in Teamtalior.		

8. Now when you are creating a job you will be able to select a package option. From the Jobs tab create a new Job posting.

Candidates Content Ana	alytics Promotions Employees			Q एः 🔗 <
	Q @ ↓₂ = <mark>+</mark>			
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	T TM Al/ML Engineer Test Department 1 3 Overdue	3 7 3 6 0	08 Jan New York	🍯 Sandboxes Merge
	Researcher Test Department 1	0 6 0 0 0	15 Dec '24 산 Solaire	🚊 Bchex-test
	AihrScreen- Java developer The OP AF Department - Test Role	0 1 0 0 0	09 Jun '24 New York	Sandboxes Merge
	T Test Public Job	0 0 0 0	02 Apr '24 관 Solaire	🍯 Sandboxes Merge
	Joseph's Test Job	22 0 1 0 0	14 Sep "23 딴 Solaire	Sandboxes Merge
	S Software Engineer I	6 0 0 0 0	06 Dec '22 남 Solaire	🍯 Sandboxes Merge
	Senior Software Engineer S The OP AF Department 39 Unixed	52 0 0 3 1	31 Jan '22 난 Solaire	Sandboxes Merge

9. When you are creating a job scroll down in the Job Posting section until you see the Package custom field and select the comp code package combination that you need.

< Back to jobs	Department	Role	
	Select department \$\hlow\$		
Job posting	Locations ①	Remote status ③	
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(쑝) Hiring team	Do not show \$		
	Internal information		
	Package *		
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	Search		
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	DEF001-STANDARD		
	Colleagues		
	Select or malayoo		
	Select employee		

Background Check process:

To initiate a background check the candidate will need to move into the Background Check stage.

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	S Software Engineer I	6 0 0 0	06 Dec '22 남 Solaire	🧉 Sandboxes Merge						
	Senior Software Engineer The OP AF Department	52 0 0 3 1	31 Jan '22 산 Solaire	Sandboxes Merge						

1. From the Jobs page select the job you want to initiate background check.

2. Once a candidate moves into the Background Check stage, Bchex will be notified and send an Applicant Express email to the candidate.

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- 3. When the background check is completed, an email will be sent to the hiring manager with the candidate's name.
- 4. The Background Check report will be attached to the candidate where you can reject or move the candidate to the next stage. To access the report, navigate to the job posting that the candidate belongs to.

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	Jobs ®				Q @ 4 = +	
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	R Researcher Test Department 1		15 Dec '24	산 Solaire	4 U 好 新 ⑥ ② タ う Bchex-test	
	A AihrScreen- Java developer	0 1 0 0	09 Jun '24	New York	👔 Sandboxes Merge	

5. Click on the candidate in the background check stage.



6. Locate the Background check result in the documents section of the candidate profile.

$\langle \rangle$ 1 of 1				
We found 3 duplicates	of this candidate. Fix this			
	TA Sourced Sourced 合合了	i to Test Department 1 Sourced application 수 ☆ ☆ Add review carnold@bib.com		S P
c	9 Phone	Empty		
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	 Jags Merge Test Custom Field Matt's Custom Field 	Empty Empty Empty		
	√ 7 more fields			
R	Researcher Sourced on Jan 3, 2025		Background Check 🗘	⊗ Reject
() Active in 1 more job			
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7. The report will give you full details of all searches completed to make a decision.



IMPORTANT: Bchex will assess the Hiring Manager on each job that is posted. The Hiring manager must be in Bchex's system or else the background check will not be processed. If there are any questions about this, please contact Client Services at clientservices@bib.com.

There is some required/mandatory candidate information needed for the background check; please check the required fields listed below.

- First Name
- Last Name
- Email

IMPORTANT: You must fill out all mandatory fields or the background check will fail. If there is an error in any information missing, you can move the candidate back into the Background Check stage once the required information is added and the Background stage will be processed.

3. Accessing Required Account Information:

API Key:

• From the Dashboard select your account and settings in the top right corner.

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• Scroll down in the side bar until you see Integrations and select API keys.

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	Skills and traits		General	
	Meeting rooms		Company details	Name
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	Contont			Merge
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	Collect permissions	1	Time	Time zone
	Manage permissions		Select the time zone and format that will be used	(GMT+01:00) Rome
	Automatic data deletion		across the ATS.	
	Privacy policy			Time format
	Cookies			24 Hours
	Candidate sharing			
	Analytics			
_				
\$	Integrations ^	·	Language	Default language
l	API keys		By default all users will use this language but users can override this with their preferred	English (United States)
	Widgets		language.	
	Facebook Pixel			
	Google			
	Slack integration		ATS management	Caroor alto monoror
	Marketplace activations		Select who takes care of the different parts of the	

• If you already have an API key set up with admin Read/Write permissions, then copy the API key and give it along with the other required information to client services.

• If an API Key does not exist, then select the + New API Key button on the upper right of the page.

Integrations → API keys	
API keys	+ New API Key

• In the modal give your API key a name, for API Scope select Admin, and check read and write. Then press Create and copy your newly created API key.

New API Key		
Name test key		
API Scope Admin	\$	
 Read Write 		
	Create	

• You can now locate your API key on the API keys page and provide it to client services.

Data Processing Region:

• From the Dashboard select your account and settings in the top right corner.

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Senior Software Engineer The OP AF Department	39 unneed							
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S Software Engineer I	(2 sevend)	January 2025						
*T Test Public Job								
Recent connects								
00			21 22 28 29	23 30				

Select the General tab and scroll to the bottom of the page. In the Data Processing section, you will find your region.

7	Jobs Candidates	Content /	Analytics	Promotions Employees			Q	Ċ)	A	¢	Merge ~	
Q s	earch settings Company General Organization Locations Billing Auto join Security	Ŷ		ATS management Select who takes care of the ATS.	different parts of the	Career site manager Santboxes Merge Pick the primary reculter as manager. The manager is the d Privacy managers Select employee The selected user will receive notifications about all data p expired permissions.	efault se ermissio		replies : ing requ	indidates.		
Q	Security Templates Employees Messages Jobs To-dos Job offers	Ŷ		Meetings Privacy setting for when cale within the company. Private show the details to the part meeting. You can also choos candidate names in the invite	indars are shared visibility will only cipants of the e to not include e descripition.	Meeting visibility Default visibility						
Å	Recruitment Groups Questions Ratings Custom fields Tag manager Reject reasons Skills and traits			Data processing Teamilatior offers two differe processing and storage, EU (Oregon). Learn more about data proce	nt regions for data Ireland) or US West sssing	Data processing region EU (ireland)					Save	
	Meeting rooms Apply with											

4. Support

For any type of inquiry you can contact our Client Support team, details are given below. Email ID : clientservices@bib.com Phone : 704-439-3900.