Chapter 1

Onboarding Steps

from ADP DataCloud Identity, Employment and Income Verification API Guide

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Chapter Contents

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Summary

The purpose of this page is to share the necessary steps to onboard the ADP DataCloud Employment and Income Verification APIs from development to production. It serves as a guide to inform what are the major milestones and required steps in the journey, so that you may best prepare to bring your integration to market.

Pre-requisite: before any of the below steps can be taken, the following 2 pre-requisites must be completed:

1. Register your organization via our partner program form, if not done so previously
2. Sign the mutual non-disclosure agreement (MNDA). The MNDA will be provided by your ADP business development contact. The information in this guide is ADP proprietary and Confidential Information.

Step 1: Introduction and Overview

With the MNDA signed, you'll now be able to get further acquainted with our API service. Typically, this involves arranging a call between ADP and your teams to dive into the details.

Step 2: Business Term Sheet

As part of the business development effort, ADP will present a business term sheet. The business term sheet is a mostly nonbinding agreement setting forth the basic terms and conditions under which a partnership alliance or other business relationship will be made. It serves as a template to develop more detailed legally binding documents (MSA/SOW). The term sheet also helps ADP understand the different use cases and market verticals your organization wishes to use ADP data for.

Step 3: Sandbox Agreement

Your ADP business development contact will then provide an API Sandbox Agreement to be signed. The ADP API Sandbox Agreement allows the creation of developer credentials so that your team can test the APIs using dummy test data and begin development.

Step 4: Letter of Intent (LOI)

Your ADP business development contact will also provide an LOI, which is a mostly non-binding agreement that records the nonbinding intention of ADP and your organization to move forward with discussions and potential negotiations related to formalizing a partnership or other business relationship.

Step 5: Development Credentialing

Once the Sandbox Agreement and LOI are signed, your developer account can be created (you will receive an automated email with login details) and you will be able to have your development credentials fully set up (via the Partner Self Service portal: **adpapps.adp.com/self-service**). The Partner Self Service Portal is a convenient place where you can view documentation, generate SSL Certificates, and generate development credentials. You can view the API specification, and even download a Postman Collection to make calling our APIs as easy as possible.

In addition, your ADP Technical Advisor will help set up the following:

1. Set up a secure file sharing site to which onboarding documents can be shared, such as dummy test inputs that provide different types of data responses to depict various scenarios, and other supporting documentation to help your team with development.
2. Set up a private Slack Channel between development teams to answer any technical questions related to the integration. Your ADP Technical Advisor will provide a link to your development team to join Slack.
3. Finish the setup of your development credentials so that you may try out the APIs for development purposes.

Development credentials are composed of a client ID and client secret. In addition to the client ID and client secret, you must generate a mutual SSL certificate (via the Partner Self-Service portal) in order to successfully connect to our API endpoints.

Step 6: FCRA Questionnaire

As part of the legal review process, potential partners are required to complete the FCRA Questionnaire to help ADP gauge your organization's position on and compliance with potentially applicable regulatory requirements. This questionnaire will be provided by your business development contact. The ADP legal team will also review any use case, process flow or interactive demonstrations to gain understanding of your services and data flows. It is helpful if you can provide any documentation or demos of how ADP data will be used in your product or services.

Step 7: Global Security Organization (GSO), Third-Party Risk Assessment (TPRA), & Privacy Reviews

All partners of ADP are required to undergo a formal security and risk assessment, faciliated by our GSO team. Partners will be asked to complete required security and risk questionnaires. This process can take 4-8 weeks to complete. Your ADP business development contact will help kick off this process.

The privacy review process includes a questionnaire used by the Global Data Privacy and Governance team to identify and evaluate privacy risks associated with the processing of personally identifiable information/personal data (PI).

Step 8: Master Services Agreement (MSA) & Statement of Work (SOW)

At this stage, ADP will provide an MSA and SOW for review. Once the MSA/SOW is signed by both parties, production credentials can be fully registered and used.

Step 9: Production Credentialing

Once the MSA/SOW is signed, production credentials can be fully registered and set up. The production credentials are a new set of client ID and client secret which you can generate from the Partner Self-Service Portal, however they will not work until the MSA/SOW are signed. When the production credentials are fully registered by the ADP Technical Advisor after the MSA/SOW is signed, you will gain access to live production data by using those production credentials. The existing mutual SSL certificate can be used with production credentials.

Step 10: Billing / Invoicing Set Up

Finally, your ADP Technical Advisor will ask for the contact info of your lead business development member, to whom invoices and billing will be addressed to. ADP will then set up an account for that business development member and send an invitation to login to finish registration. Afterwards, the billing/invoicing will be set up.

The Partner Self Service Portal also contains a link to your production API Usage. Here, you can quickly view how many API calls were made each month, including the ability to download all the transctions for each month.