Guide

Tax Credit Screenings API Guide

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Summary

Chapter 1

Tax Credit Screenings API Interactions Overview

Tax Credit Screenings API Interactions Overview

The top-level summary of the API interactions in a typical integration between an Applicant Tracking System (ATS) and ADP Tax Credits can be summarized into 4 main steps with a pre-requisite step of obtaining an access token.

Pre-requisite: Obtain a token for use in subsequent API interactions. Please review the avaiable resources on ADP Access Tokens.

1. Initiate a tax credit screening
2. Present screening subject with screening URL to complete the screening
3. Obtain screening status/results
4. Send hire notification

Below is an overview of each interaction. Refer to the API Explorer on the ADP Developers Portal for details and examples of JSON payloads for all Tax Credits interactions. The API Explorer is available on the link below:

https://developers.adp.com/articles/api/tax-offrg-tcs/tax-offrg-tcs-tax-tax-credit-screenings-v1-tax-credit-screenings/apiexplorer

Initiate Tax Credit Screening (Step 1)

A tax credit screening is initiated by the ATS by posting to the **/events/tax/v1/tax-credit-screening.initiate** endpoint. This post should contain any applicable screening subject pre-collected data. The post should also contain a URL that the screening subject will be redirected to once the Tax Credit Screening is completed. The response from ADP will include the newly initiated screening ID and the URL to complete the screening process which will be utilized in subsequent steps.

Present screening subject with screening URL to complete the screening (Step 2)

The ATS will present the screening URL obtained from the **/events/tax/v1/tax-credit-screening.initiate** response in step one to the screening subject. The URL brings the screening subject into the ADP Screening Application to complete the Tax Credit Screening. Once the screening is completed by the screening subject, they will be redirected to the redirect URL provided in the screening initiate post.

Obtain screening status/results (Step 3)

There are two options for an ATS to obtain the screening status/results from a screening subject's screening: Retrieving the status of a specific screening OR an event notification process. Both options will obtain the completion status, eligibility results, and potential credit amount from the ADP response.

Retrieving the status of a specific screening

This method of obtaining results is best utilized when there is an indication to the ATS that the screening has been completed, like redirecting the candidate back into the ATS. When the ATS receives a notification that the screening is completed the status of a specific screening can be retrieved with a GET API request sent to the endpoint **/tax/v1/tax-credit-screenings/{credit-screening-id}** where {credit-screening-id} is the screening ID received in response to the initiate screening request in step 1.

Event Notification Queue

The second option to obtain screening results is to use an event notification mechanism to process results as screenings are completed. This process utilizes a loop of GET and DELETE requests to **/core/v1/event-notification-messages** to process a queue of all results.

Send hire notification (Step 4)

The final interaction is to notify ADP of an screening subject being hired by posting the required information to **/events/tax/v1/tax-credit-screening-subject.hire.** This API request is optional if a company already regularly submits a flat file containing new hire data to ADP Tax Credits

Chapter 2

Tax Credits Screening Details and Best Practices

Point of Screening

A WOTC Screening must take place on or before the Job Offer date per IRS guidelines. There are two typical placements of the screening process:

1. As part of the application. This can be in-line with the application and presented as another portion or section of the client's application or it can be at the end of the application where a candidate is then launched into the ADP screening.
2. As part of the application workflow. This is generally after an application is complete and automatically initiated based on a trigger that a candidate reaches. The candidate may be requested to screen via an email or invited to return to the application system to complete tasks. The most popular triggers include:
    1. Interview
    2. Candidate considered
    3. Pre-Offer eligibility check

Note

ADP's Best Practice reccomendation is to offer multiple Points of Screening to a client. Each client can choose based on business need and culture to use one or the other or a combination of both methods.

Screening Launch Requirement

To receive maximum benefit from the WOTC program the launch into the ADP screening process should be required to complete the application. The program is voluntary and ADP provides each candidate the opportunity to "Opt Out" of the screening. A restriction to prevent a system user to make a Job Offer can also be created; however, this restriction should allow for an easy method to present the screening to the candidate so that no delay in the Offer process is encountered.

Note

ADP's Best Practice recommendation is to offer the launch of the ADP WOTC Screening as required for a completed application since ADP will provide the applicant with the option to not participate. Some clients may choose to not activate this configuration and ADP will work with them to understand the impact to their WOTC program.

Multiple Applications

It is common practice for applicants to apply to more than one position. The launch of the screening, especially when it is in-line with the application should be considered. ADP has logic that can recognize previously employed or previously applied candidates within a pre-determined amount of time. The ADP system will adjust the experience to meet the program and applicant circumstances. However, be aware ADP will assign a unique Interaction ID to each requested screening regardless of the time span for the exact candidate. This functionality is only applicable if the applicant supplies their SSN at time of the WOTC screening.

Note

ADP's Best Practice recommendation is for the ATS to track the candidate's WOTC information and apply it to all applicable requisitions or move it along with the candidate should the candidate be moved to different requisition within 30 days of the original WOTC screening. If this is not possible, the client should understand the WOTC screening will be presented each time it is requested by the ATS and based on the client configuration ADP may be able to shorten the subsequent screenings.

Initiate Tax Credit Screening: Request

For a successful API call to initiate a Tax Credit screening, all screening subject (candidate/applicant) information is optional to provide. However, it is encouraged that any of the available fields that have already been collected by the ATS should be included in the Initiate Tax Credit Screening Request Details so that this data is pre-populated within the screening to prevent data reentry for the screening subject resulting in an improved application experience. Not all the fields available in the API call may be asked during the WOTC screening; the screening process is responsive and optimized based on the subject's answers. Any required information not provided by the initiate call will be collected by ADP during the screening process.

The screening subject data for this integration fall into two main categories:

1. Optional in API call but required in screening- providing this in the initiate call will pre-populate the screening with this information to eliminate screening subject data reentry.
2. Optional in API call- not collected during screening unless needed based on the screening subject's answers to the screening questions, is collected by ADP if sent in the API call.

Please see SSN Collection Section for full explanation of when SSN needs to be provided and the options for collection.

Initiate Tax Credit Screening: Request Details

Information	Field	Required?	Notes
OrganizationID	organizationID	Required	Provided by ADP
SSN	taxID	See SSN Section	See SSN Collection Section
Name	givenName	Optional in API call but required in screening	

	middleName	Optional in API call	
	familyName1	Optional in API call but required in screening	
DOB	birthDate	Optional in API call	May be required during screening depending on screening answers
Address	lineOne	Optional in API call	Street address only
	cityName	Optional in API call	
	codeValue	Optional in API call	
	shortName	Optional in API call	
	subdivisionType	Optional in API call	State
	countryCode	Optional in API call	US
	postalCode	Optional in API call but required in screening	
Communication	areaDialing	Optional in API call	
	dialNumber	Optional in API call	Mobile number is preferred
	emailUri	Optional in API call	
Expected Work Location	codeValue	Optional in API call	
Redirect URL	taxCreditRedirectURI		This is the URL the candidate will be redirected to after the screening is complete

Initiate Tax Credit Screening: Response

The /events/tax/v1/tax-credit-screening.initiate response from ADP will include the newly initiated screening unique identifier (also referred to as Screening GUID, credit-screening-id, or screening ID) and the URL to complete the screening process which will be utilized in subsequent steps.

Initiate Tax Credit Screening: Response Details

Information	Field	Note
Screening GUID	taxCredit Screening itemID	Unique identifier of screening
Screening Link URL	"edit-form" link"	URL to be presented to the candidate

The Screening GUID returned in the response is the unique identifier for the screening and will be used to either obtain eligibility results of that specific screening or match eligibility results obtained from the queue to the correct screening.

The ATS will present the Screening Link URL obtained from the **/events/tax/v1/tax-credit-screening.initiate** response to the screening subject. The URL provided by ADP brings the screening subject into the ADP Screening Application to complete the Tax Credits Screening. Once the screening is completed by the screening subject, they will be redirected to the redirect URL provided in the screening initiate post.

Chapter 3

Tax Credit Screening Status Details and Best Practices

Requesting a Screening Status

It is important to retrieve the status of the ADP Screening to allow End Users of the ATS to keep track of candidate screening completion as well as results, known as potential eligibility for tax credits. This allows the client to use the Tax Credit program as the Federal Government has designed.There are generally two ways of accomplishing this:

1. The ADP API allows for a redirect URL to be sent with each Screening request where ADP can redirect the candidate at the end of the ADP Screening. Once a candidate lands on this page the system can trigger the screening status request.
2. After completing the ADP Screening the candidate can take an action such as checking a box or clicking a "Continue" button to move to the next portion of the workflow or to submit their task as complete. The action taken by the candidate within the ATS can trigger the Screening status request.

In the case that the ATS cannot support redirecting the candidate to a landing page or requesting action from the candidate, ADP supports the use of an Event Notification Queue for screening results. It is not appropriate for the ATS to make individual status requests for all records until the desired response is received. Please see the Eligibility Retrieval Options section for additional details.

Screening Status Functionality

The screening results should be made available to system end users for review. The available eligibility results data points to be collected and displayed with in the ATS for end users are: Completion status, Eligibility status/details, and Optout flag.

Screening Results Details

Information	**Field**	**Possible Values**	**Notes**
Completion status	screeningStatusCode	Partner Initiated	The screening has been initiated; screening subject has not yet entered the screening
		InProgress	Screening subject entered the screening but has not yet completed it
		Complete	The screening subject completed the ADP screening; eligibility results are available
		InComplete	The screening subject entered, but did not complete the ADP screening
Optout Status	optOutIndicator	True/False	
Tax Credit	taxCreditCode	WOTC IEC FedEZ	Name of the credits when response is eligible. Depending on which programs the client participates in there could be others listed, separately, for other credit name (IEC, FedEZ, etc.)

Pre-Hire Eligibility Status	eligibilityCode	Eligible Ineligible	Eligible – potential Tax Credits savings results are also available and can be displayed Ineligible – no potential Tax Credit saving was found
Potential Credit Amount	potentialCreditAmount	Dollar value in USD	

Clients may choose to assign the visibility of screening status to user groups or permissions. Often clients will build in the flexibility to display different levels of details around completion status/details. For example:

- Level 1- Completion Status only
- Level 2- Completion Status and Eligibility status
- Level 3- Completion Status, Eligibility status and Potential Credit Amount

The Eligibility results may also be used to create rules or checkpoints within the ATS around candidate workflow progression to make the completion of the WOTC screening a required step if desired. Based on the Completion and/or Opt Out status a client may choose to take certain action such as launching another screening attempt or moving a candidate to the next application workflow trigger.

Note

ADP's Best Practice recommendation is for all completion and pre-hire eligibility status to be visible to end users of the ATS. The visibility should also be permission based allowing a client to select which user group should receive this permission.

Eligibility Retrieval Options

Retrieving the status of a specific screening

This method of obtaining results is best utilized when there is an indication to the ATS that the screening has been completed, like redirecting the candidate back into the ATS.

This method can obtain any completion statuses outlined above.

Note

ADP's Best Practice recommendation is to initiate the Screening Status request based on a trigger or task completed by the candidate. It is not appropriate for the ATS to make individual status requests for all records until the desired response is received.

Event Notification Queue

The second option to obtain eligibility results of applicants is to use an event notification mechanism to process results as screenings are completed and placed into a queue. This method should only be used if the ATS cannot support retrieving the status of a specific screening based on an appropriate trigger.

Only screenings with a Completion status of "Complete" are entered into this queue.

Each client defined in the ADP system has a single queue. If the queue option is turned on at the client level, all completed screenings for a client are entered into this queue.

Considerations when using this method of Eligibility Retrieval:

- A screening must be assumed as unfinished until the results are picked up from the queue
- Must be able to handle processing the events in any order. The design for processing results must not assume that results will be obtained in a certain order.
- Must be able to handle events from ScreeningIDs that were initiated outside of the integration
- Must be able to empty the queue at regular intervals

Chapter 4

Tax Credits Hire Notifications Details and Best Practices

Hire Notification Trigger

The Hire Notification is essential to a successful WOTC program. As such, it is critical to receive a Hire Notification for all hired applicants. The trigger should be a step or status that ALL hired candidates reach and one that all system users responsible for hire actions are able to take.

Note

ADP's Best Practice recommendation is to select a Hire Notification trigger that is required to be reached by all hired candidates.

Hire Notification Data Elements

The Hire Notification has data elements that are generally input by a system user or are timestamps of actions taken by a system user. The client must determine what steps or actions best match the required data and indicate which optional elements should be included in the Hire Notification to ADP. Data Elements in the hire call that are always recommended are:

- Social Security Number
- ADP created Screening ID (GUID)
- Job Offer Date
- Hire Date
- Start Date (should never be prior to Hire date)
- Work location
- Position or Job Title
- Starting Wage and Wage Type

This requires the data elements be captured in the system prior to the Hire Notification trigger taking place. These data elements should also be marked as required for input before a Hire Notification can be sent to ADP.

The hire data provided in this notification fall into three categories:

1. Critical- Required for a successful hire notification to be processed. Depending on the design for SSN Collection, SSN and/or Tax Credit Screening ID are critical in the hire notification. See SSN Collection section for further details.

2. Mandatory manual Client follow up needed if not included. ADP will perform follow up with the client to collect this data manually to be able to process any potential tax credits.

3. Other- may require manual Client follow up needed if not included depending on configuration.

Hire Notification Data Details

Information	Field	Required?	Notes
Tax Credit Screening ID	taxCreditScreening itemID	YES - Critical	See SSN Section
SSN	taxID	YES- Critical	See SSN Section
Offer Date	offerExtensionDate	YES- Mandatory Manual Client follow up needed if not included	
Hire Date	hireDate	YES- Mandatory Manual Client follow up needed if not included	
Start Date	actualStartDate	YES- Mandatory Manual Client follow up needed if not included	
Job Title	jobTitle	Other	
Wages	baseRemuneration	Other	See Wages Section
Location	assignedWorkLocation codeValue	YES- Mandatory Manual Client follow up needed if not included	

The hire notification response of a successfully processed hire will echo the hire info plus confirmation number, the eligible credits and potential credit values.

Hire Notifications that are received by ADP but not processed may return the following expected error messages.

Hire Notification Errors

Error Code	Error Message
406	This applicant has already been hired.
406	SSN was not previously informed. It must be known at the moment of the hire. *See SSN Collection Section*
404	Screening Record not found for the given Identifier(s)

Depending on the integration design, it may be appropriate for the ATS to display the above error codes for potential follow up. Specially the "SSN was not previously informed…" error should be displayed to the ATS end user if SSN is required in the hire notification.

Note

ADP's Best Practice recommendation is to require all the indicated data elements in the hire notification. It is also Best Practice to launch the Hire Notification only after all required data elements are input into or gathered by the system. A premature launch or missing data should immediately prompt a system user to make corrections and retrigger the Hire Notification.

Wages

The following wage type options are supported

- hourlyRateAmount
- dailyRateAmount
- weeklyRateAmount
- monthlyRateAmount
- annualRateAmount
- biweeklyRateAmount
- semiMonthlyRateAmount

The nameCode value should reflect the chosen wage type from above. The codeValue will be the pay at the chosen wage type.

Ex: Of an hourly rate of 10.75 "baseRemuneration":{"hourlyRateAmount":{"currencyCode":"USD","amountValue":10.75}}

- monthlyRateAmount, codeValue= 1720
- annualRateAmount, codeValue=22360

Chapter 5

Tax Credits SSN Collection

SSN Collection

Applicant SSN must be captured for a successful notification of hire to ADP. SSN can be provided in the screening request, collected by ADP during the screening or collected in the hire notification. By default, SSN is a mandatory field within the applicant screening process. If SSN can be consistently captured by the ATS before the hire notification and sent in the hire notification with the Screening GUID, then ADP can configure the screening to not include candidate SSN and instead collect SSN as part of the hire notification. If SSN is not in the screening request or collected during the screening, it must be provided in the hire notification for the hire to succeed. If SSN is not in the screening request, not collected during the screening, and not provided in the hire notification, the hire notification will fail and will result in potential missed tax credit opportunity.

Info

The business decision of where to collect SSN may be influenced by the screening placement and other design decisions. Please review the intended method for capturing SSN with the ADP Tax Credits Team.

Examples of Possible configuration for collecting SSN include:

Initiate Tax Credit Screening Request	ADP Screening	Hire Notification
SSN not sent	SSN not asked by ADP during Screening	SSN REQUIRED
SSN not sent	SSN collected by ADP from candidate as a Required field.	SSN not required, could hire by Screening GUID instead of SSN
SSN sent if available	SSN collected by ADP from candidate as a Required field – pre-populated if sent in initiate	SSN not required, could hire by Screening GUID instead SSN

Note: If the hire portion of the integration is not built, for example if a company already regularly submits to ADP Tax Credits a flat file containing new hire data, then SSN must be asked during the ADP screening. SSN will also be required in the ADP screening if any population will be screening for WOTC outside of the built integration such as using the static/standalone link.

Chapter 6

Summary

After reviewing the Tax Credit Screening API, integration details, options and best practice recommendations reviewed in this guide, please prepare to discuss the planned integration design with the ADP Tax Credits Team.

ADP's Best Practice recommendation for screening placement is to offer multiple points of screening to a client and allow the launch of the Tax Credit Screening to be configured as required. The ATS should track the candidate's WOTC information and apply it to all applicable requisitions or move it along with the candidate should the candidate be moved to different requisition within 30 days of the original WOTC screening.

ADP recommends retrieving specific screening statuses based on a trigger or task completed by the candidate. The completion and pre-hire eligibility status of screenings should be to be visible to end users of the ATS. The visibility should also be permission based allowing a client to select which user group should receive this permission.

ADP's Best Practice recommendation for the Hire Notification is to require all the indicated data elements in the hire notification. It is also Best Practice to launch the Hire Notification only after all required data elements are input into or gathered by the system. The Hire Notification should be automatically triggered by a step or status in the ATS that is required to be reached by all hired candidates.