

# Polyguard

## Polyguard PreScreen for Lever

|                   |                                                                 |
|-------------------|-----------------------------------------------------------------|
| <b>Product</b>    | Polyguard PreScreen                                             |
| <b>ATS</b>        | Lever (Postings API + Data API v1)                              |
| <b>Console</b>    | <a href="https://console.polyguard.ai">console.polyguard.ai</a> |
| <b>Setup time</b> | approximately 20 minutes                                        |
| <b>Contact</b>    | support@polyguard.ai                                            |

### 1. Overview

PreScreen protects each job application with a **Polyguard Trust Check**: a short check the candidate completes on their phone. Unverified candidates are held in the default new applicant stage, and verified ones are advanced automatically. The verification details are recorded as a note on the opportunity.

#### How it works

Applications reach Lever by two paths:

|                     | Where the candidate applies                                                                                              | How the check is presented                                         |
|---------------------|--------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| <b>Job Board</b>    | Your Polyguard careers site at <code>https://&lt;your-polyguard-domain&gt;</code> (or embedded on your own careers page) | The Trust Check appears when the candidate clicks "Submit"         |
| <b>Direct apply</b> | Lever itself, via your Lever-hosted job site, LinkedIn, Indeed, or a referral                                            | Lever notifies Polyguard, which emails the candidate a Trust Check |

The job board is a wrapper around your Lever configuration, rendering your live Lever postings with their full application forms.

#### What you will configure

- A **PreScreen app** in the Polyguard Console, with its own hostname
- One **Lever API key** with a fixed set of permissions
- A **Human Verification stage** in your pipeline
- An **Application created webhook** from Lever to Polyguard

## Who does what

Steps marked **(Polyguard)** will be performed by a Polyguard staff member. Lever steps need a Lever **Super Admin**: only Super Admins can generate API credentials and configure webhooks.

## 2. Prerequisites

| Requirement       | Details                                                                                                   |
|-------------------|-----------------------------------------------------------------------------------------------------------|
| Lever access      | A <b>Super Admin</b>                                                                                      |
| Polyguard account | Console access at <a href="https://console.polyguard.ai">console.polyguard.ai</a> with the admin role     |
| Lever site slug   | The {site} in <a href="https://jobs.lever.co/{site}">https://jobs.lever.co/{site}</a> (<your-lever-site>) |
| Brand assets      | Logo, exact brand colors, and the company display name for the careers site                               |

### Secrets are shown once

Lever displays an API key exactly once, and the Polyguard Console stores it write-only, showing only the last 4 characters afterwards. Copy each value into the Console the moment you create it.

## 3. Collect your Lever values

Find these values under **Settings** in Lever. Keep the values to hand; you will paste them into the Console in [Section 4](#).

### 3a. Lever API key

The key should be configured with the following endpoint permissions. **Allow access to confidential data** can be left off.

| Read endpoints               | Write endpoints                   |
|------------------------------|-----------------------------------|
| read posting                 | apply to posting                  |
| read posting apply form      | create opportunity note           |
| read opportunity             | update opportunity stage          |
| read opportunity application | update opportunity archived state |
| read stage                   |                                   |
| read archive reason          |                                   |

| Read endpoints        | Write endpoints |
|-----------------------|-----------------|
| read diversity survey |                 |

1. Open **Settings → Integrations and API → API Credentials**.
2. Under **Lever API credentials** (not the Postings API key at the top of the page), click **Generate New Key**.
3. Name the key `Polyguard PreScreen`. The name and an optional logo appear on the notes and stage changes Polyguard writes.
4. Under **Permissions**, tick the endpoints in the table above.
5. Click **Generate key**, then **Copy Key**. This is the only time Lever shows it.

### 3b. Site slug

The `{site}` in your Lever-hosted job site URL, `https://jobs.lever.co/{site}`. For your account this is `<your-lever-site>`.

### 3c. The `Human Verification` stage

Lever pipeline stages are shared across all postings. Teams whose applicants land in, or should advance into, a different stage can be listed under **Pipeline stages by team** on the Candidate verification card of the PreScreen settings page.

1. Open **Settings → Pipeline and archive reasons**.
2. Add a stage named **Human Verification** directly after the stage new applicants land in (by default **New applicant**).

Candidates who pass a Trust Check are moved into it; unverified candidates stay in the landing stage.

### 3d. Perform-as user (optional)

Stage moves and notes are attributed to the API key by default. To attribute them to a Lever user instead (for example a shared recruiting-ops account), open that user in Lever and copy the id from the URL.

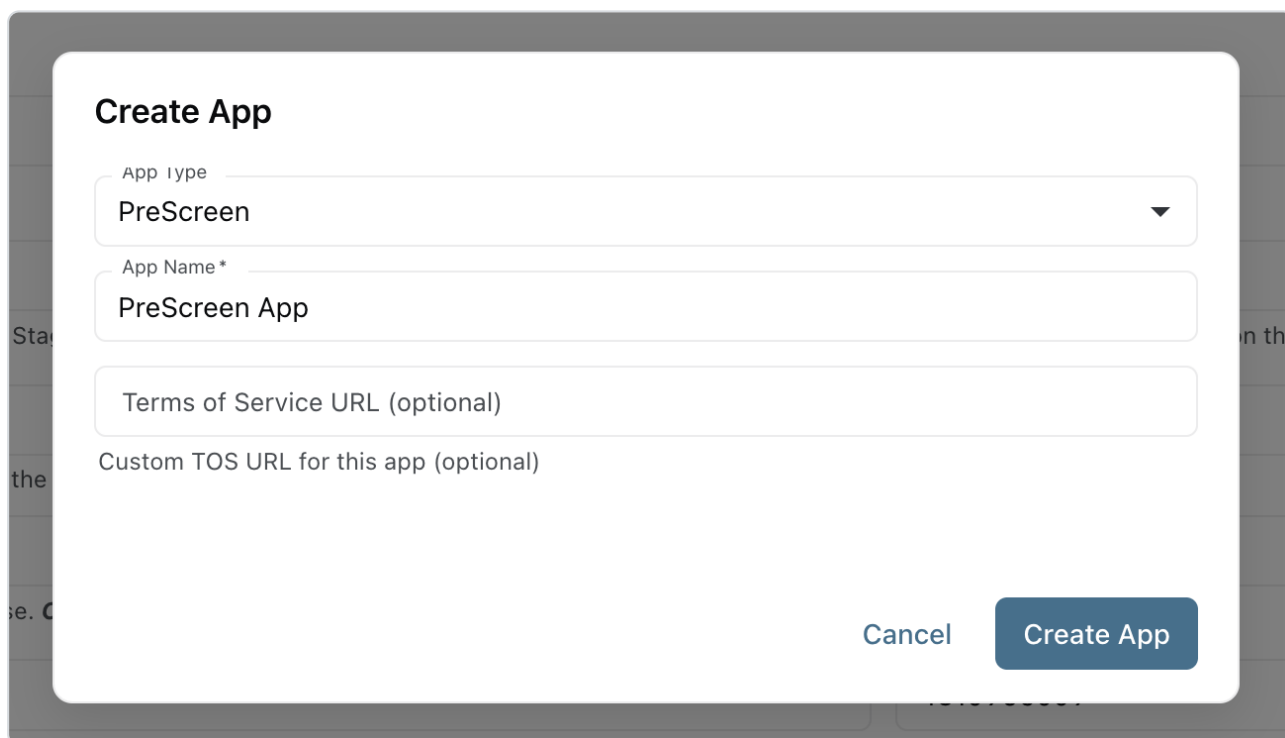
### 3e. Archive reason (optional)

When an emailed Trust Check is not completed within 7 days, Polyguard revokes the link. If you also want the candidate archived, pick an archive reason under **Settings → Pipeline and archive reasons** and note its id. Leave this out to keep unverified candidates held in the landing stage.

## 4. Configure the app in Polyguard

### 4a. Create the PreScreen app (Polyguard)

Console → **Create App** → app type **PreScreen**.

A modal dialog box titled "Create App". It contains three input fields: "App type" with a dropdown menu showing "PreScreen", "App Name\*" with the text "PreScreen App", and "Terms of Service URL (optional)". Below the third field is the text "Custom TOS URL for this app (optional)". At the bottom right are two buttons: "Cancel" and "Create App".

**Create App**

App type  
PreScreen

App Name\*  
PreScreen App

Terms of Service URL (optional)

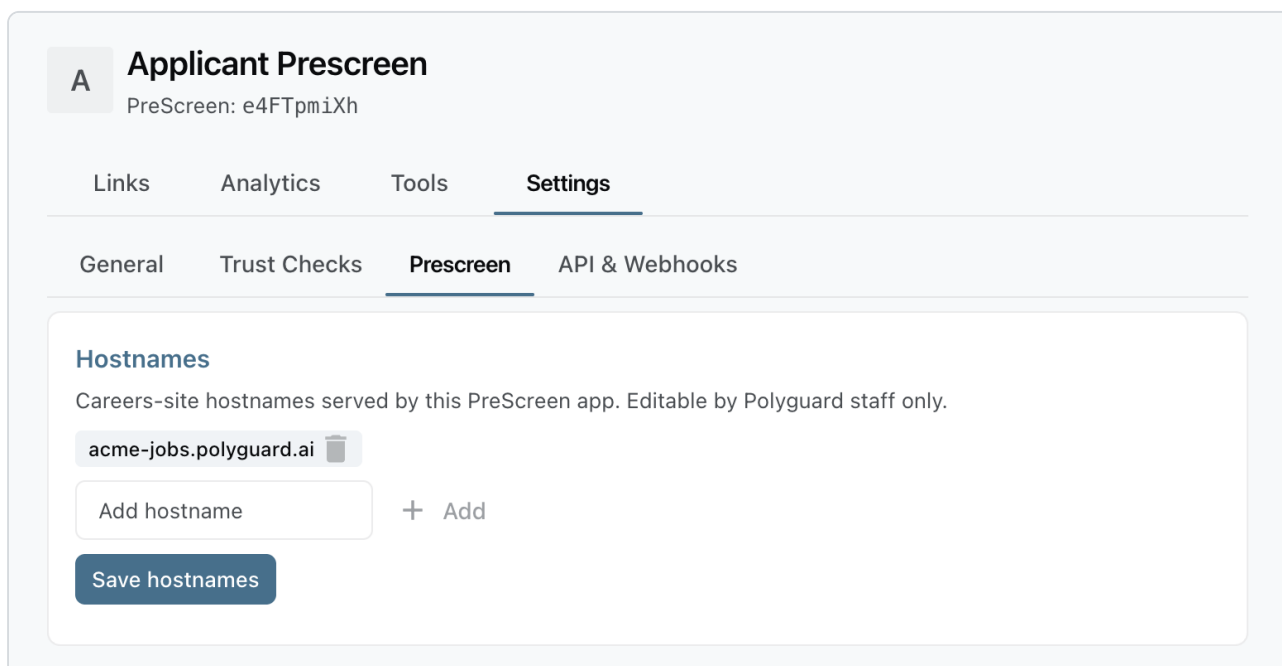
Custom TOS URL for this app (optional)

Cancel Create App

Creating it reserves a hostname of the form `{account-slug}.prescreen.polyguard.ai`.

#### 4b. Check the hostname (Polyguard to change)

**Settings → Prescreen → Hostnames** shows the host this tenant is served on. Account admins can read it; only Polyguard staff can change it.

A screenshot of the "Applicant Prescreen" settings page. The page has a header with a tab "Settings" selected. Below the header are sub-tabs: "General", "Trust Checks", "Prescreen" (selected), and "API & Webhooks". The "Prescreen" tab shows a section titled "Hostnames" with the text "Careers-site hostnames served by this PreScreen app. Editable by Polyguard staff only." Below this text is a list of hostnames, currently showing "acme-jobs.polyguard.ai" with a trash icon. There is an "Add hostname" input field and a "+ Add" button. At the bottom is a "Save hostnames" button.

**A Applicant Prescreen**  
PreScreen: e4FTpmiXh

Links Analytics Tools **Settings**

General Trust Checks **Prescreen** API & Webhooks

**Hostnames**  
Careers-site hostnames served by this PreScreen app. Editable by Polyguard staff only.

acme-jobs.polyguard.ai

Add hostname + Add

Save hostnames

The webhook URL in [Section 5](#) is built from it, and so is the address Polyguard delivers verification results to.

## 4c. ATS connection

**Settings → Prescreen → ATS connection**, provider **Lever**.

| Field                            | Value                                                                                                                           | From               |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Lever site                       | your site slug, <code>&lt;your-lever-site&gt;</code>                                                                            | <a href="#">3b</a> |
| Data residency (us   eu)         | <code>us</code> unless your Lever account is on <code>api.eu.lever.co</code>                                                    |                    |
| Lever Data API key               | the key generated in 3a                                                                                                         | <a href="#">3a</a> |
| Live submit (1 = on)             | leave blank for a demo run (the success screen shows what would be sent to Lever); set to <code>1</code> to create applications |                    |
| Webhook signing token            | copied from Lever in <a href="#">Section 5</a>                                                                                  |                    |
| Perform-as user id               | optional                                                                                                                        | <a href="#">3d</a> |
| Initial (landing) stage name     | <code>New applicant</code> , or your landing stage's exact name                                                                 | <a href="#">3c</a> |
| Gate stage name                  | <code>Human Verification</code>                                                                                                 | <a href="#">3c</a> |
| Archive reason id (expiry)       | optional                                                                                                                        | <a href="#">3e</a> |
| Company name (Trust Check email) | optional display name in the emailed Trust Check                                                                                |                    |

Click **Save ATS configuration**. Secrets clear from the form on save and show their last 4 characters afterwards; leaving a secret blank keeps the stored value rather than clearing it.

## 4d. Branding

**Settings → Prescreen → Branding**: company name, colors, logo, favicon and theme stylesheet, plus the careers title and intro shown above the roles list. Optional extras on the same card: your site navigation and header button, the roles list layout (department tabs) with a notice and call to action. Changes reach the careers site within a minute.

---

## 5. Register the webhook in Lever

Lever notifies Polyguard whenever an application is created.

### 5a. The webhook URL

`https://<your-polyguard-domain>/api/ats/webhook`. The Console shows it in the **ATS connection** form above **Webhook signing token** once a hostname is saved; use it verbatim.

## 5b. Create the webhook

1. In Lever, open **Settings → Integrations and API → Webhooks**.
2. Toggle **Application created** on and click **Add webhook**.
3. Enter the URL from 5a.
4. Copy the **Signature token** Lever shows for this webhook.
5. Click **Verify connection**. Lever sends a sample event and reports success. If it fails because the Polyguard site is not yet live at the hostname, Lever still delivers real events once it is.

## 5c. Save the signing token in the Console

Back in **Settings → Prescreen → ATS connection**, paste the token into **Webhook signing token** and click **Save ATS configuration**.

---

## 6. Support

---

- **Email:** support@polyguard.ai
- **Console:** [console.polyguard.ai](https://console.polyguard.ai)
- **Sending Trust Check emails from your own domain:** [Sending From Your Domain](#)

### Lever documentation

- [Lever API reference](#)
- [Generating and using API credentials](#)
- [Webhooks: set up, signing and delivery history](#)

For Lever platform issues unrelated to Polyguard, contact your Lever administrator or Lever Support.