symplr CTM

Contingent Talent Management

# CLEARCONNECT

## Application Programming Interface 2.0

18 December 2023

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# Introduction

**Contingent Talent Management (CTM)** is a Healthcare Staffing Software platform in the portfolio of solutions from symplr, a pioneer in delivering better outcomes through best-in-class healthcare operations solutions and services.

https://www.symplr.com/contingent-talent-management

https://www.symplr.com/about

Contingent Talent Management (CTM) is an innovative web-based solution that helps health care staffing agencies automate the process of identifying, matching, paying, billing, and managing temporary and travel medical professionals. The CTM API, referred to as **ClearConnect**, allows for greater flexibility and visibility into staffing data, giving customers the ability to perform complex tasks such as data mining, automated job board posting, and integrating staffing data into third-party websites and applications.

This document is intended for IT and development professionals. It will provide information on the API functions, how they are called, and what types of responses are generated. A working knowledge of the comma separated, JSON, or XML data formats is expected. Knowledge of consuming web services may also be required. A few examples will be provided along with the API documentation.

It is also expected that you understand the many medical staffing, and more specifically CTM, terms. This user guide does not attempt to explain this type of terminology or their relationship except when it pertains to a specific data relationship. For example, this document will not explain what a *Region* is in Staffing, but it will describe to you when a given piece of data has a dependency to a *Region*.

The following outlines the topics that are covered in this user guide.

- Architectural Overview
    - Determine your URL
    - Logistics in ClearConnect
    - Sessions
    - Data Types
    - Additional Considerations
- Getting Started
- Function Reference

# Architectural Overview

ClearConnect is an Application Programming Interface (API) for CTM customers to access and manipulate Staffing & Credentialing data. This section of the user guide covers how to access the API, an overview of the logistics of ClearConnect requests and responses, and the supported request and response formats.

## Determine Your URL

The very first step when getting started with ClearConnect is to understand how to talk to the service. The next section will talk about what methods are available for connecting to ClearConnect, but all methods require you to understand what URL to start with.

To begin, identify the CTM customer site name. Consider the following URL: https://ctms.contingenttalentmanagement.com/myCTM. The site name in this case is "myCTM".

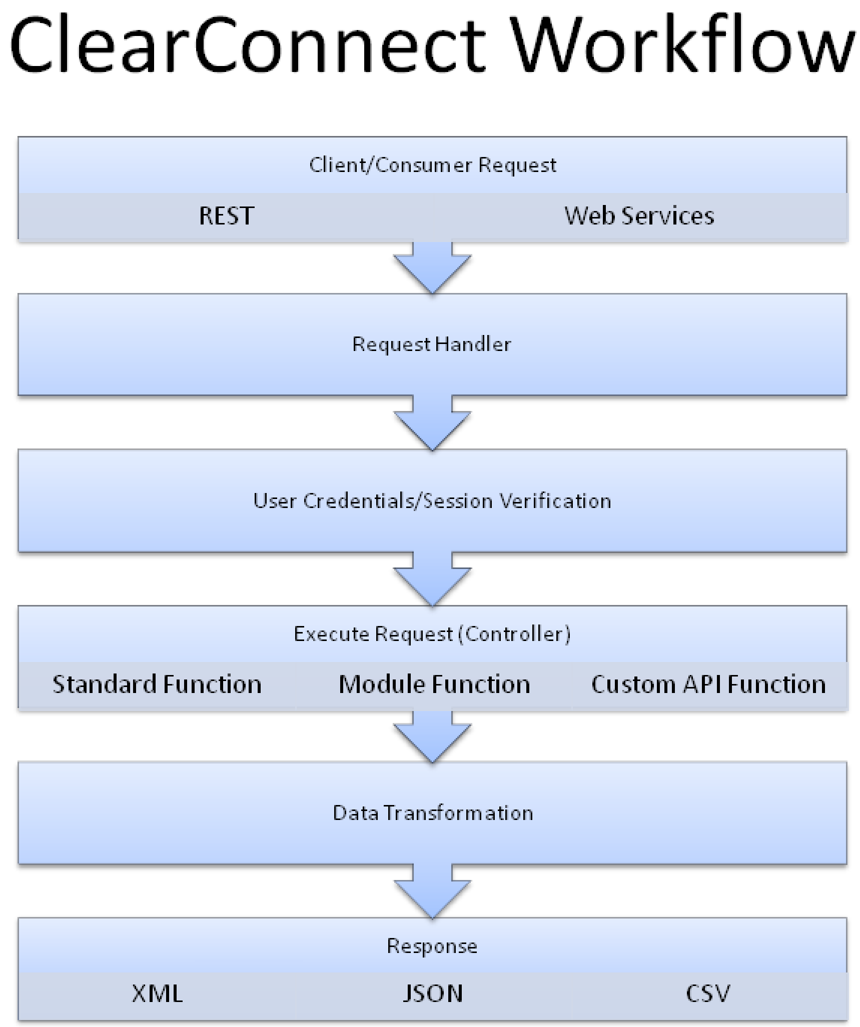
For ClearConnect 2.0, for REST calls, the remainder of the URL needs to point to the ClearConnect folder, followed by the version number. As of this document's release, the folder name is "clearConnect", and the version number is "2_0". At this point our URL would look like this: https://ctms.contingenttalentmanagement.com/myCTM/clearConnect/2_0/index.cfm/.

There is a difference in URL for a REST call versus a Web Service call. Please see the documentation below regarding web services.

# Logistics in ClearConnect

This section discusses the logistics of requests and responses in ClearConnect, as well as the various supported types of requests and responses.

## Anatomy of a Request and Response




Developing with ClearConnect begins by crafting a request. Data can be requested via web services or REST calls. Web services is an industry standard for message exchange over standard HTTP and RPC protocols using specially crafted XML in a format called SOAP (Simple Object Access Protocol). Many programming languages offer extensive support for SOAP transmission, and further simplify web service consumption through WSDL (Web Services Description Language). This document will cover examples using WSDL for consuming the ClearConnect web service.

Requests can also be made via REST calls. REST, or Representational State Transfer, is a term used loosely to describe simple mechanisms to interface with a remote software system through HTTP via GET and POST operations. In ClearConnect this means the ability to craft a request in a browser with a URL, or through a programmatic POST operation.

Once a request is crafted and sent a specific handler picks up your request. There is a specific handler for both web services and REST requests, and each request handler parses the information sent to prepare the execution environment. From here, authorization to execute the request is verified. See the Authorization section below for supported methods of authorization.

Once your credentials have been verified a *function controller* will execute your request. The **action** parameter is what dictates what should happen in your request, and we will demonstrate more on that in the **Request Types** section. There are, however, two types of functions in ClearConnect. The first type is a *Standard Function*. These are functions that are built into the ClearConnect API and available to all CTM customers. The next type is a *Module Function*. Module functions are only available to CTM customers who have purchased or enabled a specific module in Staffing and/or Credentialing for added functionality. If you attempt to execute a *module function* and your configuration does not have the required module enabled, you will receive an error indicating that the required module must be enabled. The final type is a *Custom API Function*. These functions are those created by us for your organization and can only be executed by your company. Custom API functions will not be in the standard user documentation and will be documented in supplemental documents and given only to your organization.

Once the request has been executed a response is generated. This response goes through a data transformation process to return the response in a format of your choice. Currently ClearConnect supports the following response formats: XML, JSON, CSV, and Tab separated values (TSV). We'll talk more about the specifics of each format in the **Response Formats** section. Once the data is transformed it is returned to you.

# Authorization

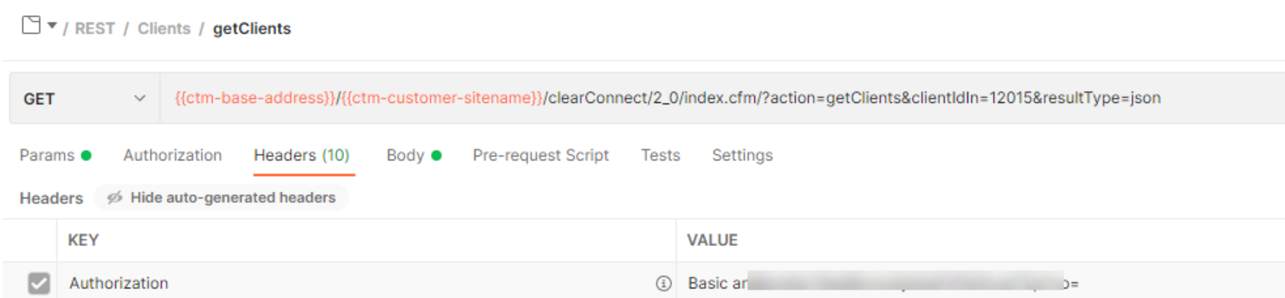
## REST

For REST requests, an Authorization header is required. Two Authorization header methods are supported in the REST pattern.

### REST AUTHORIZATION OPTION 1: BASIC AUTHORIZATION

To use Basic Authorization:

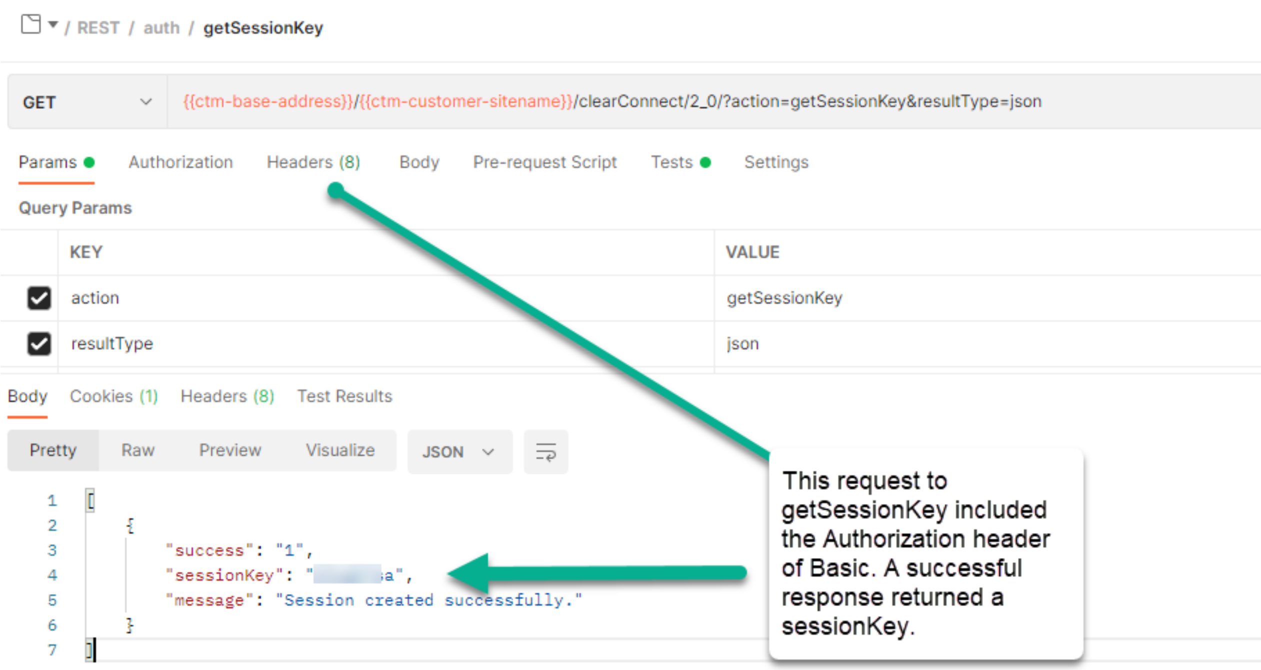
1. Identify the username and password which will be used to access the API
2. Combine username and password with a colon and convert to a Base64 encoded string using UTF-8.
    a. Example
        i. string to encode - ***username:password***
        ii. Resulting Base64 string using UTF-8 - **dXNlcm5hbWU6cGFzc3dvcmQ=**
3. Add a Basic Authorization header to the headers of all requests
    a. Header name: Authorization
    b. Header value: Basic {Base64string}
    c. Example: ***Basic dXNlcm5hbWU6cGFzc3dvcmQ=***



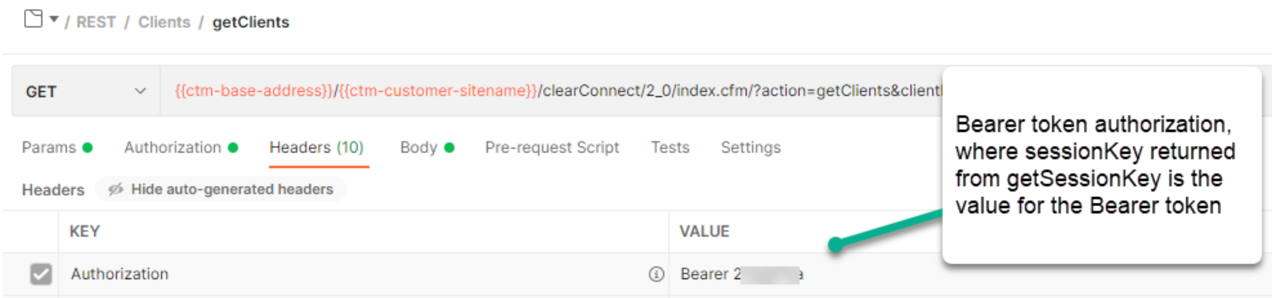
## REST AUTHORIZATION OPTION 2: BEARER TOKEN AUTHORIZATION

To use Bearer Token Authorization:

1. Identify the username and password which will be used to access the API
2. Combine username and password with a colon and convert to a Base64 encoded string using UTF-8.
    a. Example:
        i. string to encode - ***username:password***
        ii. Resulting Base64 string using UTF-8 - **dXNlcm5hbWU6cGFzc3dvcmQ=**
3. Add a Basic Authorization header to the headers of the **getSessionKey** method
    a. Header name: Authorization
    b. Header value: Basic {Base64string}
    c. Example: ***Basic dXNlcm5hbWU6cGFzc3dvcmQ=***
4. Make a GET request to the **getSessionKey** method once this header is included
    a. A successful request will return a sessionKey value in the response.




5. All other requests can use an Authorization header of Bearer Token, where the sessionKey is the token
    a. Header name: Authorization
    b. Header value: Bearer {sessionKey}
        i. Example:

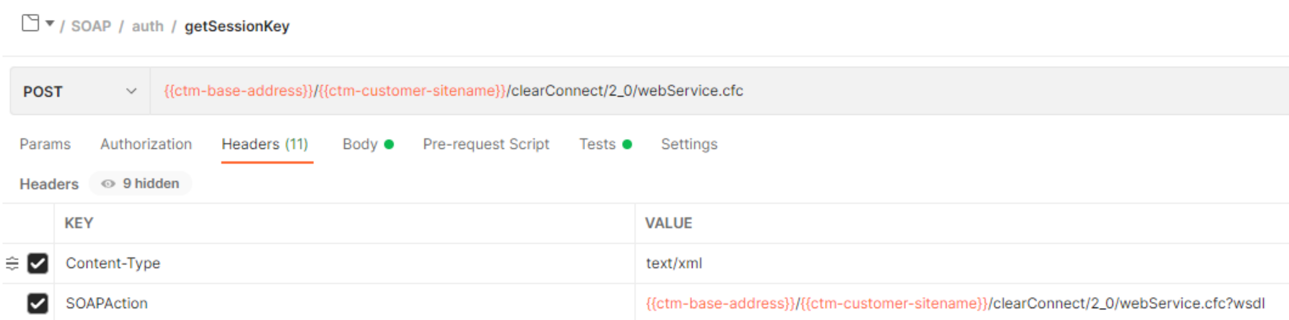



## SOAP

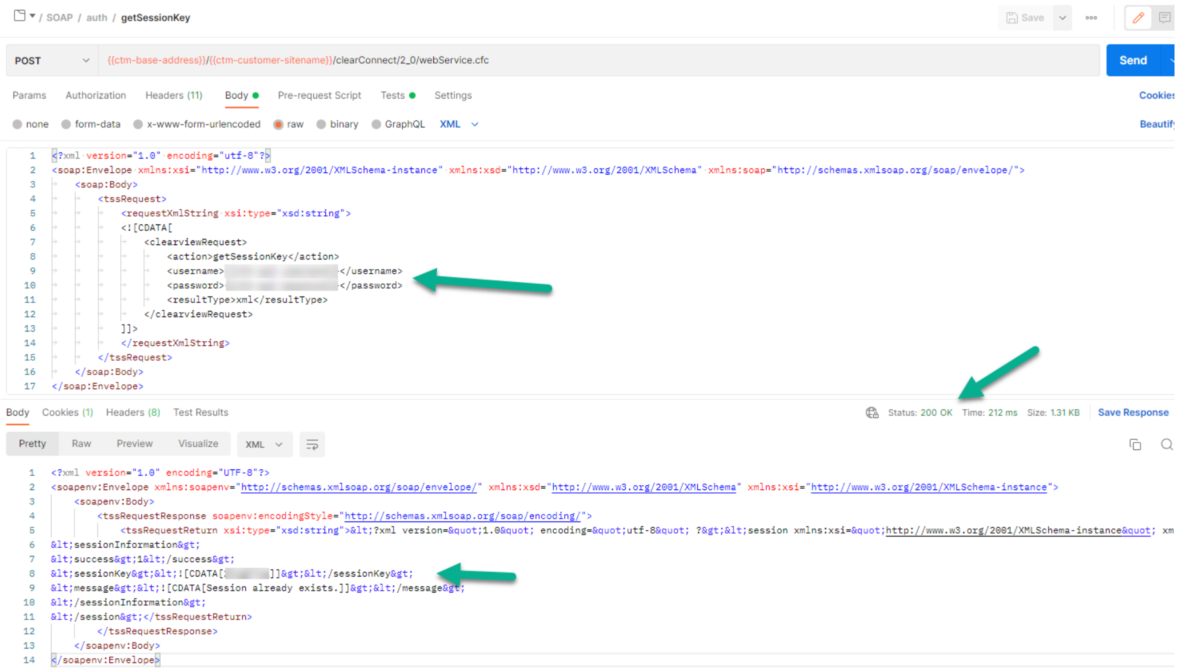
The recommended authorization pattern for SOAP requests is to obtain and use a Session Key for most requests. This session key may then be passed along in place of your username and password, meaning that only the session key is required to validate your request. This method is more secure in the sense that your username and password are not visible in the body of every SOAP request.

To use a Session Key in SOAP Requests:

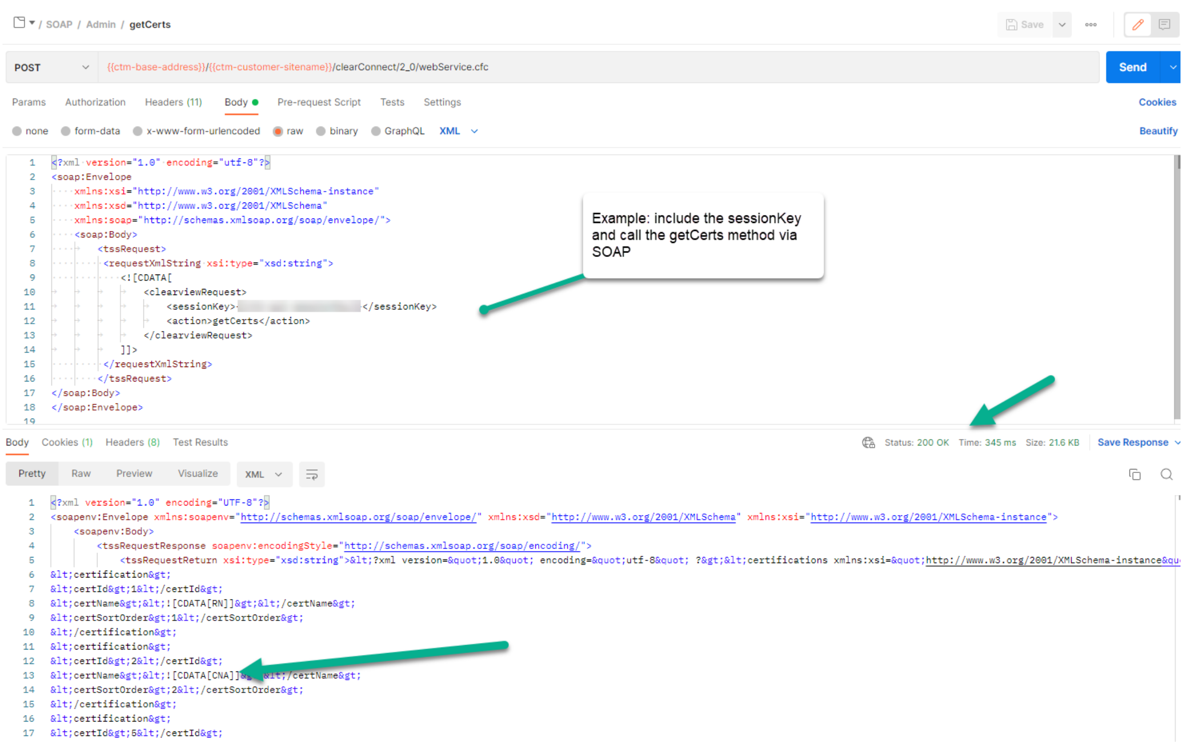
1. Identify the username and password which will be used to access the API
2. Include a SOAPAction header in all SOAP requests, with a value of https://ctms.contingenttalentmanagement.com/myCTM/clearConnect/2_0/webservice.cfc?wsdl




3. Include the API username and password values in the body of a POST request to the **getSessionKey** method
    a. A successful request will return a sessionKey value in the response.




4. All other POST requests via SOAP patterns should include the sessionKey in the body of the request.




## Request Types

## REST Calls

ClearConnect allows you to retrieve and send CTM data using REST calls via HTTP GET or POST.

As described above in the section **Determine Your URL** you must start with the URL to your CTM application. With this information our URL currently looks like this: https://ctms.contingenttalentmanagement.com/myCTM/clearConnect/2_0. For REST calls the name of the page which executes your request is **index.cfm**, making your URL look similar to this: https://ctms.contingenttalentmanagement.com/myCTM/clearConnect/2_0/index.cfm.

## Web Services

The next method in which you can retrieve and send CTM data is with web services. Most modern programming languages offer support for consuming web services to one degree or another, and most allow consumption via a WSDL document.

ClearConnect provides web service support and a WSDL document through the component **webService.cfc**. So, the URL used to consume the ClearConnect web service is https://ctms.contingenttalentmanagement.com/myCTM/clearConnect/2_0/webservice.cfc?wsdl. For details on how to consume a web service in a particular language please see the language vendor's documentation.

## Required Parameters

Regardless of whether you use web services or REST calls to develop with ClearConnect there are a certain set of parameters that are required. The first parameter that is required is the **action** parameter. The **action** parameter tells ClearConnect what it is that you wish to do. This can be anything from retrieving a set of temps/workers to updating client contact information. See the **Function Reference** section for details about what functions are available and what parameters a given function takes.

If you call ClearConnect without a **sessionKey** you will be required to provide both a **username** and **password** parameter.  These will be used to validate your access to the system and execute the requested action.

The final parameter to address is **resultType**. Although **resultType** is not required, you should consider passing it. If you do not pass it in your request your response format will default to XML. Otherwise, you may specify the format of the response by including **resultType** in your request parameters.

## Response Formats

Once you have made a request and passed it to ClearConnect, and processing has completed, you receive a response. A response from ClearConnect may contain data you requested, information regarding the status of data you sent to CTM, or even error information if something was passed in or happened incorrectly. The next sections outline what types of response formats are available, and what format your information is returned in.

## XML

XML, or eXtensible Markup Language, is a common format for data interchange in the software industry today. XML is a verbose format that is widely accepted due to its highly customizable, yet human readable nature, making it a strong language for transfers over-the-wire. Its verbose syntax, however, has been a source of criticism over the years, and can produce large results for a relatively small amount of data.

A ClearConnect response in XML format will always come back with a root node, followed by one or more "record" nodes. A record node in a ClearConnect response is like a database record and contains one or more property nodes. The schema of this XML response is documented by an XSD schema file. The schema document also makes the XML document valid to consuming applications and allows them to validate the XML data it contains.

After the root node there will be one or more record nodes. A record node will contain a series of property nodes, making the document like a set of database records. You will also note that string data in our XML document is wrapped in a CDATA wrapper. This is to ensure that any invalid characters are properly handled and make the XML document valid.

## JSON

JSON, or JavaScript Object Notation, is a data exchange format made popular with AJAX and Web 2.0 development. It has gained significant ground over the last few years due to its small, compact syntax, making it ideal for fast over-the-wire data exchange. JSON has been criticized for being difficult to read and understand.

A ClearConnect response in JSON format will come back as an array of objects. Each object will contain key/value pairs for each property in the object. The object in this case is a record. If you are unfamiliar with JSON syntax please see http://www.json.org.

As described above the response will start with an array, as denoted by the opening square bracket. This array will be filled with a series of objects (the opening curly bracket) with key/value pairs for properties. Key/value pairs in JSON are denoted by a colon, and each property and value are surrounded by quotes. Each object in the ClearConnect response array can be described as a record, like that from a database.

## CSV

CSV, or comma-separated values, is a format where records are delimited by carriage return and line feed, and each column in the record is separated by a comma. ClearConnect qualifies each column in the record with quotes. Below is an example of a CSV response.

"Version","Date","TSS Version"

"2.0","2009-03-13","tss 7.0"

The above example starts with a header row, which contains the names of each column in a record. Following the header row will be one or more record rows.

## TAB

The tab-separated values format is like the comma-separated format. The most significant difference is that the separator between each column is the TAB character (hex code 0x09). Below is an example of a ClearConnect response in TAB format.

"Version"	"Date" "TSS Version"

"2.0"	"2009-03-13"	"tss 7.0"

As with the CSV format this response starts with a header row, followed by one or more record rows. Each column is quoted and separated by a tab character.

## Error Responses

When an error occurs during the process of executing a ClearConnect request a response will be returned. There are two types of error responses you can receive: a **coded error**, and an **exception**. A **coded error** is generally an error that occurs when some criteria isn't met, such as missing arguments, or invalid data provided in your request. An **exception** is usually an error that is unexpected, or your ClearConnect request experienced a problem.

A **coded error** returns the following information.

- errorCode – A short-hand code for the error
- message – A short message for what this error is about
- detail – Additional information about this error

For example:

```
{ “errorCode”: “DV001”, “message”: “Invalid data”, “detail”: “Invalid data
was provided” }
```

An **exception** returns the following information.

- errorCode – A short-hand code for the error (if any)
- message – A short message for what this error is about
- detail – Additional information about this error
- snippet – The code surrounding this error (if any)

For example:

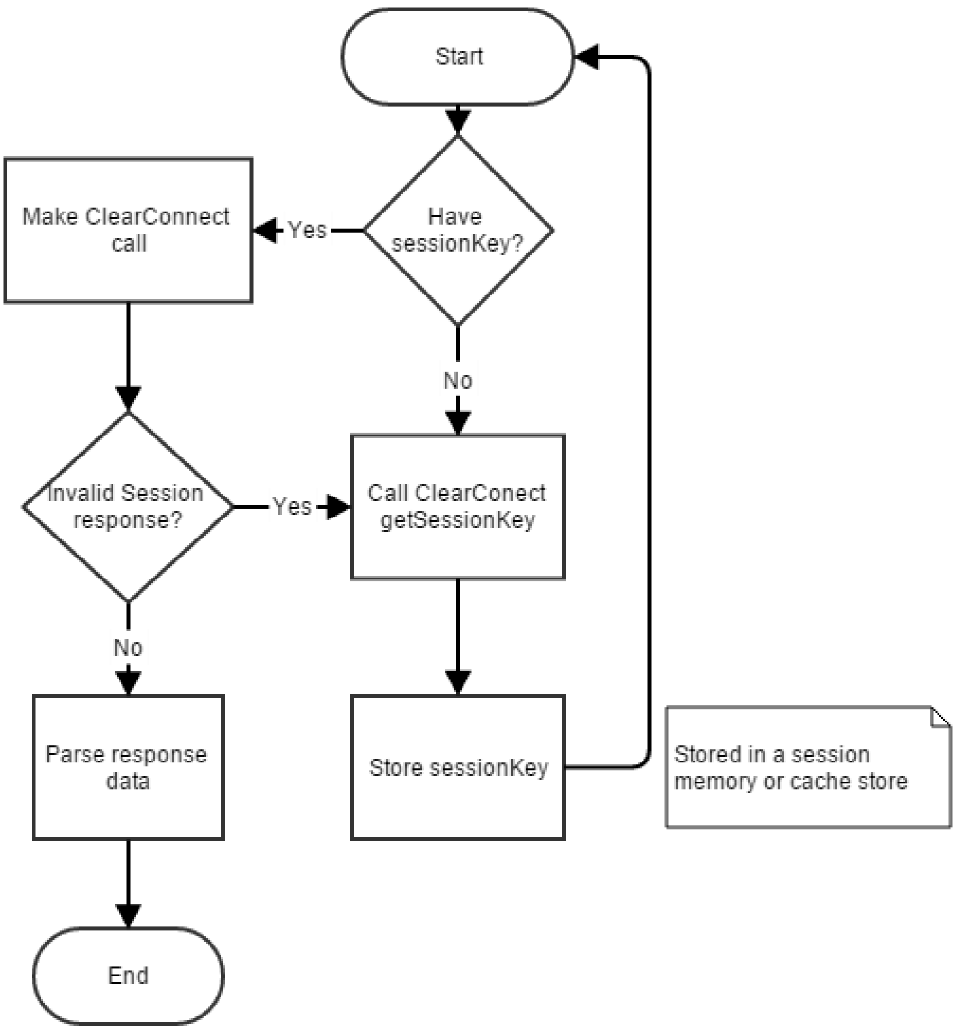
```
{ “errorCode”: “DV001”, “message”: “Invalid data”, “detail”: “Invalid data
was provided”, “snippet”: “” }
```

## Sessions

When making a request of ClearConnect several actions must take place before your request is even executed. Customer information must be retrieved, user credentials verified, and environment settings configured, all before your request is handled. To combat this issue, ClearConnect supports the ability to store that data in a session at the server and provide you with a **sessionKey**. The session key identifies your company and user's right to access ClearConnect, which pairs you up with your stored credentials and environment data. The request then does not have to check your username and password on each request, but instead simply retrieves your session by key. See the Authorization section in this document to leverage the sessionKey, either as a Bearer token in the header of REST requests or by obtaining a sessionKey for SOAP requests.

## Workflow

When developing an application that makes use of ClearConnect, it is inefficient to make the request for a session key before every request. Consider the following workflow:




In the above workflow an application, when ready to make a call to ClearConnect, first checks to see if it has a session key. This is perhaps stored in your application server session memory, or a semi-persistent cache storage system. If session key has already been retrieved, it is used to make the desired ClearConnect call.

The result of the ClearConnect call should be inspected. If all is successful, you will receive the data you requested. However, session keys expire after a time, and if your session key has expired you will receive a response that looks like this:


```
[
  {
    "errorCode": "DS008",
    "message": "Invalid session.",
    "detail": "The session you specified appears to have either expired, or is invalid.",
    "snippet": ""
  }
]
```


When you receive a response indicating your session has expired you will need to make a call to the ClearConnect method “getSessionKey” to retrieve another. This pattern continues throughout the life cycle of your application.

## Example

Below is an example of how this might work using PHP. Please note that this sample is not complete, nor will it execute correctly, as it makes calls to non-existent functions.

```
<?php

	function getOpenOrders() {
		$sessionKey = getSessionKey();
		$response = makeClearConnectCall("getOrders", array(
			"status" => "open"
		));

		if (sessionIsExpired($response)) {
			throw new Exception("Session has expired");
		}
```

```
            return simplexml_load_string($response);
    }

?>
```

# Data Types

ClearConnect is an API designed to work with many various systems, and as such must often work with differing data types. To reduce complexity ClearConnect supports a very specific set of data types each with certain expectations on how they are formatted and delivered. Below we will outline those expectations and standards.

## String Data

When constructing your request, it is important to remember to properly format your string data. If you are performing REST calls you will need to URL escape your string sequences. For XML data strings are expected to be well formatted according to XML standards by either escaping illegal characters or wrapping the data block in a CDATA tag. For example, if you are sending temp information to be inserted into CTM, and you have a large text block of data to send over in the **notes** field you would need to properly escape it. An example of a CDATA tag looks like this:

```
<notes><![CDATA[My note data goes here. Most text should be wrapped like this.]]></notes>
```

Please note the parts of the string highlighted in red. These indicate the beginning and ending marks of a CDATA block tag. Inside a CDATA block you may have illegal XML characters, such as slashes or carriage returns.

## Date/Time

Date and time values are flexible in ClearConnect but there are a few rules when sending them in a request. If the function documentation states that the data type is a **Date** only a date is required. If the data type specifies a **DateTime** there are a couple of formats available. Below is an outline of the various **Date, Time,** and **DateTime** formats.

- 01/01/2009 – Date data type
- 2009-01-2009 – Date data type
- 13:45 – Time data type
- 13:45:04 – Time data type
- 1:45 PM – Time data type
- 01/01/2009 13:45 – DateTime data type
- 01/01/2009 1:45 PM – DateTime data type
- 2009-01-01T13:45:00 – ISO 8601 DateTime data type

Please note that the examples range from just a simple date to a full date and time with AM/PM indicator. Also note that either 12-hour time with AM/PM indicator or 24-hour time is acceptable.

When ClearConnect returns a response with Date, Time, or DateTime they will be formatted in the following manner.

- 2009-01-01 – Date
- 13:45:00 – Time
- 2009-01-01T13:45:00 – DateTime

### Boolean

The next type are **Boolean** data types. ClearConnect is flexible in what it takes as a Boolean argument. The following values are typically acceptable.

- For Boolean TRUE
    - true
    - yes
    - y
    - 1
- For Boolean FALSE
    - false
    - no
    - n
    - 0

Any actions that return a set of records with a Boolean column will return zero (0) for false and one (1) for true.

### String and Numeric Lists

String and numeric lists are a data type of either comma-delimited strings, or comma-delimited numbers. Below is an example of each.

- 1,59,60,67
- Active,Inactive,Terminated

Please note that when ClearConnect returns a list it will be of type string. For an XML response the XSD will specify the data type as string as well.

### Base64 String

Some functions in ClearConnect will return a Base64 encoded string or will even require a Base64 encoded string as a parameter in the request. Base64 is a MIME based transfer encoding that allows data to be transformed from binary format to alphanumeric representation. This format makes transfers of binary data over-the-wire less complex. This data type is used, for example, in transmission of binary documents to and from CTM.

## Additional Considerations

Below is an outline of additional items of consideration when developing applications with ClearConnect.

- Case sensitivity – For the most part ClearConnect is case sensitive. This holds particularly true for XML requests and responses. For this reason, pay special attention to case if you are having difficulty with ClearConnect.
- All "get" actions (for example: **getTemps**) have record limits. They vary depending on the data set, and those limits will be documented per function call. This is to limit stress of our web application servers. It is usually best to be specific in your request criteria to get only the data set you are most interested in.
- All "insert" actions (for example: **insertTemps**) have a record limit of 200 records. This means you may only insert up to 200 records per batch/call. This is to limit stress on our web application servers.
- Some third-party tools or programming languages, such as Microsoft Visual Studio, offer introspection and discovery of web services. You will find that when you enter your WSDL URL into these tools only one method comes back from the discovery. There is only one entry method in ClearConnect, and that method then takes its parameters for the request in an XML document. This is for maximum portability between disparate systems and SOAP implementations.

# Getting Started

## Consuming with XML

When writing an application that interfaces with ClearConnect you may find yourself having to work with XML. In this section we will demonstrate how to craft requests for consumption using XML. The examples presented here will also show how to get a **sessionKey,** so you don't have to send your login each time you make a call.

Before we begin with the examples, we first need to discuss the anatomy of an XML request. There is one method available in the web service version of ClearConnect: **tssRequest**.

The exact format of the tssRequest method will vary based on the method being called. ClearConnect requests can be broken down into three major types: get, insert, and update. All three types will have the following variables present in each request: **sessionKey**, **action**, and **resultType**. Below are sample of each type.

### Get

```
<clearviewRequest>
   <sessionKey>6a7b2c2d</sessionKey>
   <action>getOrders</action>
   <resultType>xml<resultType>
   <status>Filled</status>
```

```
   <shiftStart>2011-03-01</shiftStart>
</clearviewRequest>
```

### Insert

```
<clearviewRequest>
   <sessionKey>6a7b2c2d</sessionKey>
   <action>insertTempRecords</action>
   <resultType>xml</resultType>
   <tempRecords>
      <tempRecord>
         <firstName>Adam</firstName>
         <lastName>Presley</lastName>
         <homeRegion>1</homeRegion>
         <status>Active</status>
      </tempRecord>
      <tempRecord>
         <firstName>John</firstName>
         <lastName>Smith</lastName>
         <homeRegion>13</homeRegion>
         <status>Active</status>
      </tempRecord>
   </tempRecords>
</clearviewRequest>
```

### Update

```
<clearviewRequest>
   <sessionKey>6a7b2c2d</sessionKey>
   <action>updateTempRecords</action>
   <resultType>xml</resultType>
   <tempRecords>
      <tempRecord>
         <tempId>125</tempId>
         <middleName>Adam</middleName>
      </tempRecord>
   </tempRecords>
</clearviewRequest>
```

As you can see the **get** type of request is a flat set of nodes, where the actual filter nodes vary based on the method being called.  The **insert** and **update** requests are nearly the same, each one with a root node container for one or more record nodes to insert or update.

# Function Reference

## Section: Orders

### getOrders

**Description:** Returns per diem order data, or shifts, filtered by the arguments passed in the request.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **shiftStart** | Date | The earliest date a shift can be scheduled. | No |
| **shiftEnd** | Date | The latest date a shift can be scheduled. | No |
| **status** | String List | A comma-delimited list of statuses to filter the results against | No |
| **orderId** | Numeric List | Comma-delimited list of order Ids to filter the results against | No |
| **tempId** | Numeric List | Comma-delimited list of temp Ids to filter the results against | No |
| **clientId** | Numeric List | Comma-delimited list of client Ids to filter the results against | No |
| **certification** | String | The name of a certification to filter the results against | No |
| **specialty** | String List | Comma-delimited list of specialties to filter against | No |
| **regionId** | Numeric List | Comma-delimited list of region Ids to filter against | No |
| **clientRegionIdIn** | Numeric List | Comma-delimited list of region Ids to filter against | No |
| **tempRegionIdIn** | Numeric List | Comma-delimited list of region Ids to filter against | No |
| **payrollNumberIn** | Numeric List | Comma-delimited list of payroll numbers to filter by. | No |
| **clientStateIn** | String List | Comma-delimited list of client states | No |
| **clientCityIn** | String List | Comma-delimited list of client cities | No |
| **orderBy1** | String | First order by column. Valid values: orderId, status, shiftStartTime, clientName, orderSpecialty, orderCertification, floor, orderType, city, state. Defaults to orderId. | No |
| **orderByDirection1** | String | Direction of first order by. Valid values: ASC, DESC. Defaults to ASC. | No |

| | | | |
|---|---|---|---|
| **orderBy2** | String | Second order by column. See orderBy1 for valid values. | No |
| **orderByDirection2** | String | Direction of second order by. See orderByDirection1 for valid values. | No |
| **orderBy3** | String | Third order by column. See orderBy1 for valid values. | No |
| **orderByDirection3** | String | Direction of third order by. See orderByDirection1 for valid values. | No |
| **orderSourceID** | Numeric | Filters orders by an order source id. | No |
| **dateCreatedStart** | Date | Filter records where created date starts with this date. Used with the dateCreatedEnd argument. | No |
| **dateCreatedEnd** | Date | Filter records where created date ends with this date. Used with the dateCreatedStart argument. Includes records through 11:59pm of this date. | No |
| **dateModifiedStart** | Date | Filter records where created date starts with this date. Used with the dateModifiedEnd argument. | No |
| **dateModifiedEnd** | Date | Filter records where modified date ends with this date. Used with the dateModifiedStart argument. Includes records through 11:59pm of this date. | No |
| **vms** | Numeric | Filter orders by VMS flag. Accepted values are 1 and 0. If '1' then returns vms orders and if '0' then returns non-vms orders. | No |
| **bookingRegion** | Numeric | Filter orders by booking region. Only available with the Booking Region Module. | No |
| **orderSourceName** | String | Filters orders by an order source name. | No |
| **orderAccountManager** | Numeric | Filters orders by an order account manager | No |
| **integrationOrderID** | String | Filters orders by an integration Order ID, i.e., 3rd party system. | No |

| | | | |
|---|---|---|---|
| **integrationType** | String | Filters orders by type of integration, i.e., 3rd party system. | No |

**Returned Fields:**

| Field Name |
|---|
| **orderId** |
| **status** |
| **shiftStartTime** |
| **shiftEndTime** |
| **tempId** |
| **firstName** |
| **lastName** |
| **clientId** |
| **clientName** |
| **regionName** |
| **orderSpecialty** |
| **orderCertification** |
| **floor** |
| **shiftNumber** |
| **note** |
| **payrollNumber** |
| **lessLunchMin** |
| **dateTimeCreated** |
| **takenBy** |
| **bookedByUserId** |
| **orderTypeId** |
| **orderType** |

| |
|---|
| **city** |
| **state** |
| **zipCode** |
| **orderSourceID** |
| **orderSourceName** |
| **lt_OrderID** |
| **dateTimeModified** |
| **subjectID** |
| **subject** |
| **vms** |
| **bookingRegion (If module is on)** |
| **subcontractVendorId** |
| **subcontractVendorName** |
| **integrationOrderID** |
| **integrationType** |

## getOrderTypes

**Description:** Returns per diem order type data.

**Returned Fields:**

| Field Name |
|---|
| **orderTypeID** |
| **orderType** |

## getOrderSources

**Description:** Returns a set of order sources that the customer has enabled for their site. An **order source** describes an order's origin. If your customer site has external sources configured, then this function will return records containing the fields outlined in the section below labeled **Returned Fields**.

If no **orderSourceName** is passed and there are no external sources configured, no records will be returned. If an **orderSourceName** is provided as a filter, but no records are returned, an error response will be returned indicating that no records were found using that **orderSourceName**. Please see the section named **Error Responses** for more information on error response formats.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderSourceName** | String | The name of a specific order source to filter results by | No |

**Returned Fields:**

| Field Name |
|---|
| **orderSourceID** |
| **orderSourceName** |

## getLtOrders

**Description:** Returns long term order data filtered by the arguments passed in the request.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **ltOrderId** | Numeric List | Comma-delimited list of order Ids to filter the results against | No |
| **dateStart** | Date | Alias for startDateBegin | No |
| **dateEnd** | Date | Alias for startDateEnd | No |
| **startDateBegin** | Date | Filter records where start date begins with this date. Used with the startDateEnd argument. | No |
| **startDateEnd** | Date | Filter records where start date ends before this date. Used with startDateBegin argument. | No |
| **endDateBegin** | Date | Filter records where end date begins with this date. Used with the endDateEnd argument. | No |
| **endDateEnd** | Date | Filter records where end date ends before this date. Used with the endDateBegin argument. | No |
| **status** | String List | A comma-delimited list of statuses to filter the results against | No |

| | | | |
|---|---|---|---|
| **clientId** | Numeric List | Comma-delimited list of client Ids to filter the results against | No |
| **certification** | String | The name of a certification to filter the results against | No |
| **specialty** | String List | Comma-delimited list of specialties to filter the results against | No |
| **hotJobsOnly** | Boolean | Returns long term orders marked as Hot only. | No |
| **regionIdIn** | Numeric List | List of region IDs | No |
| **clientRegionIdIn** | Numeric List | Comma-delimited list of region Ids to filter against | No |
| **tempRegionIdIn** | Numeric List | Comma-delimited list of region Ids to filter against | No |
| **clientStateIn** | String List | List of client states. | No |
| **clientCityIn** | String List | List of client cities. | |
| **orderBy1** | String | First order by column. Valid values: orderId, status, shiftStartTime, clientName, orderSpecialty, orderCertification, floor, orderType, city, state. Defaults to orderId. | No |
| **orderByDirection1** | String | Direction of first order by. Valid values: ASC, DESC. Defaults to ASC. | No |
| **orderBy2** | String | Second order by column. See orderBy1 for valid values. | No |
| **orderByDirection2** | String | Direction of second order by. See orderByDirection1 for valid values. | No |
| **orderBy3** | String | Third order by column. See orderBy1 for valid values. | No |
| **orderByDirection3** | String | Direction of third order by. See orderByDirection1 for valid values. | No |
| **tempID** | Integer | ID of the temp that filled the LT order. | No |

| | | | |
|---|---|---|---|
| **dateCreatedStart** | Date | Filter records where created date starts with this date. Used with the dateCreatedEnd argument. | No |
| **dateCreatedEnd** | Date | Filter records where created date ends with this date. Used with the dateCreatedStart argument. Includes records through 11:59pm of this date. | No |
| **dateModifiedStart** | Date | Filter records where created date starts with this date. Used with the dateModifiedEnd argument. | No |
| **dateModifiedEnd** | Date | Filter records where modified date ends with this date. Used with the dateModifiedStart argument. Includes records through 11:59pm of this date. | No |
| **vms** | Numeric | Filter long-term orders by VMS flag. Accepted values are 1 and 0. If '1' then returns vms long-term orders and if '0' then returns non-vms long-term orders. | No |
| **bookingRegion** | Numeric | Filter orders by booking region. Only available with the Booking Region Module. | No |
| **orderSourceID** | Numeric | Filters orders by an order source id. | No |
| **orderSourceName** | String | Filters orders by an order source name. | No |
| **orderAccountManager** | Numeric | Filters orders by an order account manager | No |
| **integrationOrderID** | String | Filters orders by an integration Order ID, i.e., 3rd party system. | No |
| **integrationOrderType** | String | Filters orders by type of integration, i.e., 3rd party system. | No |
| **limit** | Numeric | 3000 is the current maximum and will continue to be the max returned. If this value is passed as less than or equal to 3000, limit by that amount. if it's passed as a higher number, continue to limit to 3000 records. | No |

| | | | |
|---|---|---|---|
| **Offset** | Numeric | use to offset the starting point of records returned. | No |

**Returned Fields:**

| Field Name |
|---|
| **lt_orderId** |
| **status** |
| **dateStart** |
| **dateEnd** |
| **startTime** |
| **endTime** |
| **clientId** |
| **clientName** |
| **orderSpecialty** |
| **orderCertification** |
| **shiftNumber** |
| **shiftName** |
| **isHotJob** |
| **Note** |
| **transportationNote** |
| **housingNote** |
| **teaserNote** |
| **City** |
| **State** |
| **zipCode** |
| **billRate** |
| **blendedBillRate** |

| |
|---|
| **completionBonus** |
| **tempId** |
| **dateTimeCreated** |
| **dateTimeModified** |
| **orderTypeLT** |
| **postingStartDate** |
| **subjectID** |
| **Subject** |
| **Created By** |
| **Modified By** |
| **vms** |
| **bookingRegion (if module is on)** |
| **orderSourceID** |
| **orderSourceName** |
| **subcontractVendorId** |
| **subcontractVendorName** |
| **orderRating (if module is on)** |
| **integrationOrderID** |
| **integrationType** |

## getLTOrderTypes

**Description:** Returns long term order type data.

**Returned Fields:**

| Field Name |
|---|
| **orderTypeLTID** |
| **orderTypeLT** |
| **orderTypePRNID** |
| **orderTypeLTStatus** |

## insertOrder

**Description:** Inserts shift order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **customerID** | Numeric | The client ID from CTM | Yes |
| **status** | String | The Order status for CTM. | Yes |
| **usernameCreating** | String | The CTM user entering the order or responsible for the order. | No |
| **userId** | Numeric | The CTM user ID associated with the username provided. | Yes |
| **specialty** | String | The specialty for the order. | Yes |
| **nursetype** | String | The certification for the order. | Yes |
| **jobDateStart** | Date | The start date for the shift | Yes |
| **jobDateEnd** | Date | The end date for the shift. | Yes |
| **shiftStartTime** | Time | The start time for the shift, in 24-hour format. | Yes |
| **shiftEndTime** | Time | The end time for the shift, in 24-hour format. | Yes |
| **shiftNum** | Numeric | The number associated with the desired shift | No |
| **shiftId** | Numeric | The ID that is associated with the shift number | No |
| **calculateShiftNumTolerance** | Numeric | When shiftNum and shiftId arguments are missed to pass then only passed calculateShiftNumTolerance argument value is considered. When passed it calculate the shiftNum based on following conditions:<br>a) 12-hour shift (durations > 9 hours), it compares the start | No |

| | | | |
|---|---|---|---|
| | | time to 7a/7p including provided calculateShiftNumTolerance value and based on that sets the shiftNum as shift 4 or shift 5<br>b) 8-hour shift (durations > 10 hours), it compares the start time to 7a/3p/11p including provided calculateShiftNumTolerance value and based on that sets the shiftNum as shift 1 or shift 2 or shift 3<br>c) If the above fails, then shift 1 is set if durations < 10 otherwise shit 4 is set if durations > 9<br><br>Default is '1'. If non-numeric value passed it considered calculateShiftNumTolerance value as 1 | |
| **orderType** | Numeric | The ID associated with the order's orderType. If no orderType is provided for the order, the system will use Staffing's 'default' orderType. If no default orderType is found, it will use the first active orderType found (by sort order). | No |
| **lt_orderid** | Numeric | The long-term order ID from CTM, if there is one, otherwise leave it blank. | No |

| | | | |
|---|---|---|---|
| **filledBy** | Numeric | The temp ID from CTM.<br>If status = 'filled' then tempID is required. | No |
| **floorDesc** | String | The client floor the shift. | No |
| **Note** | String | The note for the shift | No |
| **billCert** | String | The certification for billing<br>Required if temp and order has more than one certification in common. | No |
| **integrationType** | String | Type of integration, i.e., 3rd party system | No |
| **integrationOrderId** | String | Integration order ID, i.e., 3rd party identifier | No |
| **orderSourceID** | Numeric | An order source ID. An order source describes an order of external origin. If no order Source is passed, then it will set ClearConnect as default orderSource. | No |
| **subjectID** | String | The ID of an order subject | No |
| **subject** | String | The descriptor of an order subject | No |
| **sendShiftAlerts** | Boolean | When true, the system will send shift notifications for an order | No |
| **bookingRegion** | Numeric | ID of the booking region for the order. Only available with the Booking Region module. | Yes (if module is enabled) |
| **orderAccountManager** | Numeric | This attaches an order account manager to this order. | No |
| **clientContactID** | Numeric | The ID of a client contact to associate with the order | No |
| **createdByClientContactId** | Numeric | The ID of a client contact to associate with the client | No |
| **shiftType** | String | The shiftType from CTM. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **orderID** |
| **message** |
| **integrationOrderId** |

## insertLTOrder

**Description:** Inserts Long Term Order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientid** | Numeric | The client ID from CTM | Yes |
| **status** | String | The long-term order status for CTM. | Yes |
| **usernameCreating** | String | The CTM user entering the order or responsible for the order. | No |
| **userId** | Numeric | The CTM user ID associated with the username provided. | Yes |
| **specialty** | String | The specialty for the order. | Yes |
| **nursetype** | String | The certification for the order. | Yes |
| **date_start** | Date | The start date for the long-term order. | Yes |
| **date_end** | Date | The end date for the long-term order. | Yes |
| **shiftStartTime** | Time | The start time for the shifts, in 24-hour format. | Yes |
| **shiftEndTime** | Time | The end time for the shifts, in 24-hour format. | Yes |
| **shiftNum** | Numeric | The number associated with the desired shift | No |
| **shiftId** | Numeric | The ID that is associated with the shift number | No |
| **orderTypeLTID** | Numeric | The ID associated with the LT Order's orderType. If no orderType is provided for the order, the system will use Staffing's 'default' LT orderType. If no | No |

| | | | |
|---|---|---|---|
| | | default orderType is found, it will use the first active LT orderType found (by sort order). | |
| **floorDesc** | String | The client floor description for the shift | No |
| **hotOrder** | Numeric | Hot order indicator (0 or 1) | No |
| **note** | String | The note for the long-term order | No |
| **note_transportation** | String | The transportation notes for the long-term order | No |
| **note_housing** | String | The housing note for the long-term order | No |
| **note_teaser** | String | The teaser note that can be displayed to external systems. If not entered this will be populated using CertID, SpecID and OrderTypeLTID. | No |
| **tempId** | Numeric | The temp ID to fill the order from CTM. If status = 'filled' then tempID is required. | No |
| **billCert** | String | The certification for billing | No |
| **integrationType** | String | Type of integration, i.e., 3rd party system | No |
| **integrationOrderID** | String | Integration order ID, i.e., 3rd party identifier | No |
| **billRate** | Numeric | When the node is provided a numeric value is required. If the value is provided and greater than 0, the submitted value will be used. If the value is 0 or the node is not provided, the bill rate from the rate group will be used. | No |
| **offContractRate** | Numeric | When the node is provided a numeric value is required. If the value is provided and greater than 0, the submitted value will be used. | No |
| **subjectID** | String | The ID of an order subject | No |
| **subject** | String | The descriptor of an order subject | No |

| | | | |
|---|---|---|---|
| **bookingRegion** | Numeric | ID of the booking region for the order. Only available with the Booking Region module. | Yes (if module is enabled) |
| **orderSourceID** | Numeric | An order source ID. An order source describes an order of external origin. If no order Source is passed, then it will set ClearConnect as default orderSource. | No |
| **orderAccountManager** | Numeric | Attaches an order account manager to this order | No |
| **clientContactID** | Numeric | The ID of a client contact to associate with the order | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **lt_orderId** |
| **message** |
| **integrationOrderId** |
| **integrationType** |

## updateOrder

**Description:** Updates a per diem order. If the order was Imported via an Order Source, the order can only be updated if in an 'open' status. This function can reopen voided or filled orders by adding the argument reopen.

**Note**: If you are intending to only fill an order via your update, you should use the function 'fillOrder' instead.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderID** | Numeric | The order ID from CTM to update | Yes |
| **ltOrderID** | Numeric | The Long-Term Order ID from CTM | No |
| **customerID** | Numeric | The Client ID from CTM | No |

| | | | |
|---|---|---|---|
| **status** | String | The order status for CTM | No |
| **filledby** | Numeric | The temp ID from CTM.<br>If status = 'filled' then tempID is required. | No |
| **specialty** | String | The specialty for the order. | No |
| **nursetype** | String | The certification for the order. | No |
| **jobDateStart** | Date | The start date for the shift | No |
| **jobDateEnd** | Date | The end date for the shift. | No |
| **shiftStartTime** | Time | The start time for the shift, in 24-hour format. | No |
| **shiftEndTime** | Time | The end time for the shift, in 24-hour format. | No |
| **shiftNum** | Numeric | The number associated with the desired shift | No |
| **shiftId** | Numeric | The ID that is associated with the shift number | No |
| **lessLunchMin** | Numeric | The number of lunch minutes | No |
| **floorDesc** | String | The client floor the shift. | No |
| **Note** | String | The note for the shift | No |
| **integrationType** | String | Type of integration, i.e., 3rd party system | No |
| **orderType** | Numeric | The ID associated with the order's orderType. If no orderType is provided for the order, and no orderType already exists, the system will use Staffing's 'default' orderType. If no default orderType is found, it will use the first active orderType found (by sort order). | No |
| **updateFilledYN** | Boolean | Default is 0 = FALSE. Flag to allow a user to override the default behavor of allowing all orders to be updated. Set to 1 to allow a FILLED order to be | No |

| | | | |
|---|---|---|---|
| | | updated. Set to 0 to not allow a FILLED order to be updated. | |
| **subjectID** | String | The ID of an order subject | No |
| **subject** | String | The descriptor of an order subject | No |
| **sendShiftAlerts** | Boolean | When true, the system will send shift notifications for an order | No |
| **bookingRegion** | Numeric | ID of the booking region. Only available with the Booking Region Module. Required if attempting to update to a filled order. | Yes, if attempting to fill the order. |
| **billCert** | String | The certification for billing Required if temp and order has more than one certification in common. | Yes |
| **orderSourceID** | Numeric | An order source ID. An order source describes an order of external origin. | No |
| **reopen** | Boolean | Default is 0 = FALSE. Filled orders must be unreconciled, unpaid, and unbilled to be reopened. Voided orders will be reopened. | |
| **orderAccountManager** | Numeric | Attaches an order account manager to this order | No |
| **clientContactID** | Numeric | The ID of a client contact to associate with the order | No |
| **modifiedByClientContactId** | Numeric | The ID of a client contact to associate with the client | No |
| **shiftType** | String | The shiftType from CTM. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **orderID** |

| |
|---|
| **message** |
| **integrationOrderId** |

## updateLTOrder

**Description:** Updates a long-term order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **lt_OrderID** | Numeric | The Long-Term Order ID from CTM | Yes |
| **clientID** | Numeric | The Client ID from CTM | No |
| **Status** | String | The order status for CTM | No |
| **Specialty** | String | The specialty for the order. | No |
| **Nursetype** | String | The certification for the order. | No |
| **date_start** | Date | The start date for the shift | No |
| **date_end** | Date | The end date for the shift. | No |
| **shiftStartTime** | Time | The start time for the shift, in 24-hour format. | No |
| **shiftEndTime** | Time | The end time for the shift, in 24-hour format. | No |
| **shiftNum** | Numeric | The number associated with the desired shift | No |
| **shiftId** | Numeric | The ID that is associated with the shift number | No |
| **floorDesc** | String | The client floor the shift. | No |
| **orderTypeLTID** | Numeric | The ID associated with the LT order's orderType. If no orderType is provided and no orderType already exists for the order, the system will use Staffing's 'default' LT orderType. If no default orderType is found, it will use the first active LT orderType found (by sort order). | No |

| | | | |
|---|---|---|---|
| **Note** | String | The note for the assignment | No |
| **note_teaser** | String | The teaser note that can be displayed to external systems. If not entered this will be populated using CertID, SpecID and OrderTypeLTID. | No |
| **integrationType** | String | Type of integration, i.e., 3rd party system | No |
| **billRate** | Numeric | When the node is provided a numeric value is required. If the value is provided and greater than 0, the submitted value will be used. If the value is 0 or the node is not provided, the bill rate from the rate group will be used. | No |
| **offContractRate** | Numeric | When the node is provided a numeric value is required. If the value is provided and greater than 0, the submitted value will be used. | No |
| **tempId** | Numeric | The temp ID to fill the order from CTM.<br>If status = 'filled' then tempID is required. | No |
| **updateFilledYN** | Boolean | Default is 1 = TRUE. Flag to allow a user to override the default behavor of allowing all orders to be updated. Set to 0 to not allow a FILLED order to be updated. | YES |
| **subjectID** | String | The ID of an order subject | No |
| **Subject** | String | The descriptor of an order subject | No |
| **bookingRegion** | Numeric | ID of the booking region. Only available with the Booking Region Module. Required if attempting to update to a filled order. | Yes, if attempting to fill the order. |
| **billCert** | String | The certification for billing Required if the temp and order | Yes |

| | | | |
|---|---|---|---|
| | | has more than one certification in common. | |
| **hotOrder** | Numeric | Hot order indicator (0 or 1) | No |
| **orderSourceID** | Numeric | An order source ID. An order source describes an order of external origin. | No |
| **orderAccountManager** | Numeric | Attaches an order account manager to this order | No |
| **clientContactID** | Numeric | The ID of a client contact to associate with the order | No |
| **note_transportation** | String | The transportation notes for the long-term order | No |
| **note_housing** | String | The housing note for the long-term order | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Lt_orderID** |
| **message** |

## fillOrder

**Description:** Fills a per diem order if its status is not "void". Note: This function automatically client-confirms the order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderID** | Numeric | The order ID from CTM to update | Yes |
| **filledBy** | Numeric | The temp ID from CTM | Yes |
| **billCert** | String | The certification for billing Required if temp and order has more than one certification in common. | Yes |
| **otApproved** | Boolean | Whether or not to approve the overtime bill hours for the shift | No |

| | | | |
|---|---|---|---|
| | | if filling this shift will result in overtime for temp | |
| **otApprovedByClientContactID** | Numeric | ClientContactID who approved the overtime bill hours if filling this shift will result in overtime | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **orderID** |
| **message** |

## voidOrder

**Description:** Voids an Order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderId** | Numeric | The order ID from CTM.<br><br>Order ID is not required if integrationType and integrationOrderId are provided. | Yes |
| **usernameVoiding** | String | The CTM user entering the order or responsible for the order. | No |
| **userid** | Numeric | The CTM user ID associated with the username provided. | Yes |
| **voidName** | String | Reason for voiding the order | No |
| **voidId** | Numeric | The void Id from CTM associated with the voidReason | No |
| **voidNote** | String | Void Note | No |
| **cancelledByWho** | String | Client or Agency | No |
| **integrationType** | String | Type of integration, i.e., 3rd party system | No |

| | | | |
|---|---|---|---|
| **integrationOrderID** | String | Integration order ID, i.e., 3rd party identifier | No |
| **voidIfFilled** | Boolean | Whether or not to allow the void to continue if the order is filled. The default behavior if not passed in is to not allow the void. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **orderID** |
| **message** |
| **integrationOrderID** |
| **integrationType** |

## voidLTOrder

**Description:** Voids a Long-Term Order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **lt_OrderId** | Numeric | The long-term order ID from CTM.<br><br>Long term order ID is not required if integrationType and integrationOrderId are provided | Yes |
| **usernameVoiding** | String | The CTM user entering the order or responsible for the order. | No |
| **userid** | Numeric | The CTM user ID associated with the username provided. | Yes |
| **voidReason** | String | Reason for voiding the order | No |
| **voidId** | Numeric | The void Id from CTM associated with the voidReason | No |
| **voidNote** | String | Void Note | No |

| | | | |
|---|---|---|---|
| **cancelledBy** | String | Client or Agency | No |
| **integrationType** | String | Type of integration, i.e., 3rd party system | No |
| **integrationOrderID** | String | Integration order ID, i.e., 3rd party identifier | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **lt_OrderID** |
| **message** |
| **integrationOrderID** |

## getPayRateForOrder

**Description:** Gets base pay rate for an order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **OrderId** | Numeric | The order ID from CTM. | Yes |
| **BillCert** | String | The certification for billing.<br><br>REQUIRED If the order is open | If Open |
| **Specialty** | string | The specialty for the order. | No |
| **tempId** | Numeric | The ID of the temp to retrieve contract value if any for open orders.<br><br>If order status = 'filled' then the tempID must<br>match the tempid that is on the order. | No |

**Returned Fields:**

| Field Name |
|---|

| |
|---|
| **success** |
| **shiftdate** |
| **shiftid** |
| **rate** |
| **tempId** |

## getBillRateForOrder

**Description:** base bill rate for orders.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **OrderId** | Numeric | The order ID from CTM | Yes |
| **BillCert** | String | The certification for billing.<br><br>REQUIRED If the order is open | If Open |
| **Specialty** | string | The specialty for the order. | No |
| **tempId** | Numeric | The ID of the temp to retrieve contract value if any for open orders.<br><br>If order status = 'filled' then tempID must match the tempid that is on the order. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **shiftdate** |
| **shiftid** |
| **rate** |
| **tempId** |

# Section: CTM Staffing Data

## getActiveReferralSources

**Description:** Retrieves a data set of referral sources that are customizable in CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **referralSourceLike** | String | Filter results by referral source name. | No |

**Returned Fields:**

| Field Name |
|---|
| **referralSourceId** |
| **referralSource** |
| **placement** |

## getCerts

**Description:** Returns a data set containing all certifications (disciplines) currently setup in CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **certNameLike** | String | Filter results by certification name using a LIKE match. | No |

**Returned Fields:**

| Field Name |
|---|
| **certId** |
| **certName** |
| **certSortOrder** |

## getRaces

**Description:** Returns a data set of races from CTM.

**Arguments:** No arguments.

**Returned Fields:**

| Field Name |
|---|
| **raceName** |

## getRegions

**Description:** Returns a data set of regions from CTM. Please note that the data set returned is affected by the permissions of the user credentials sent in the request. So, if your CTM system is configured with 20 regions, and the user used to query for regions only has permission to 15 of those, only those 15 will come back in the resulting data set.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **includeExternalDescription** | Boolean | Returns external description data | No |

**Returned Fields:**

| Field Name |
|---|
| **regionId** |
| **regionName** |
| **externalDescription (optional)** |
| **sortOrder** |
| **isBookingRegion (if Module on)** |

## getAllActiveRegions

**Description:** Returns a data set of regions from CTM. This will return all regions setup for an CTM site.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **includeExternalDescription** | Boolean | Returns external description data | No |

**Returned Fields:**

| Field Name |
|---|
| **regionId** |
| **regionName** |
| **externalDescription (optional)** |
| **sortOrder** |

## getSpecs

**Description:** Returns a data set of specialties currently defined in CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **certId** | Numeric | Allows you to filter results by searching for a specific certId. Will return all specialties mapped to the certId. | No |
| **certName** | String | Allows you to filter results by searching for a specific certName. Will return all specialties mapped to the certName. | No |
| **specIds** | String | A list of one or more comma delimited Spec ID values from Contingent Staffing. Returns a list of specialty names. | No |

**Returned Fields:**

| Field Name |
|---|
| **specId** |
| **specName** |

## getVeteranStatuses

**Description:** Retrieves a data set of veteran statuses useful for populating the veteran status field when inserting or updating a temp.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **veteranStatusLike** | String | Allows you to filter results by searching for veteran statuses named like your search criteria. | No |
| **disabled** | Boolean | Filters results by getting items that have been disabled. | No |
| **deleted** | Boolean | Filters results by getting items that have been soft deleted. | No |

**Returned Fields:**

| Field Name |
|---|
| **veteranStatusId** |

| |
|---|
| **veteranStatus** |
| **veteranStatusSortOrder** |

## searchEmails

**Description:** Searches temp and client contacts for an exact email match, or alternatively, emails that are like your criteria.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **email** | String | Returns temp and client contact information where the email is an exact match. Searches the temp's email address, and client contact email addresses one and two. | No |
| **emailLike** | String | Returns temp and client contact information where the email address is like your criteria. Searches the temp's email address, and client contact email addresses one and two. | No |

**Returned Fields:**

| Field Name |
|---|
| **contactId** |
| **tempId** |
| **firstName** |
| **lastName** |
| **type** |
| **email** |
| **clientId** |

## getStates

**Description:** Returns state and country information.

**Arguments:** N/A

**Returned Fields:**

| Field Name |
|---|

| |
|---|
| **stateId** |
| **stateName** |
| **stateAbbr** |
| **countryCodeId** |

## getLOB

**Description:** Returns Line of Business information.

**Arguments:** N/A

**Returned Fields:**

| Field Name |
|---|
| **LOBId** |
| **LOBName** |
| **Cert IDs** |

## insertLOB

**Description:** Inserts a new Line of Business.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **lobName** | String | The name for the new Line of Business. | Yes |
| **certIds** | String | A list of one or more comma delimited Cert ID values from Contingent Staffing. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **LOBID** |
| **message** |

## updateLOB

**Description:** Updates a Line of Business.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **lobId** | Numeric | The internal ID value for the Line of Business to be updated. | Yes |
| **lobName** | String | The name of the Line of Business to be updated. | Yes |
| **certIDs** | String | A list of one or more comma delimited Cert ID values from Contingent Staffing. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **LOBID** |
| **message** |

## deleteLOB

**Description:** Deletes a Line of Business.

| Argument | Type | Description | Required |
|---|---|---|---|
| **lobId** | Numeric | The internal ID value for the Line of Business to delete in Contingent Staffing. Only LOBs not mapped to certifications can be deleted. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **LOBID** |
| **message** |

## getNoteTypes

**Description:** Returns Note Types based on arguments submitted.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **noteTypeIdIn** | Numeric | A list of one or more comma delimited Note Type ID values from Contingent Staffing. | No |
| **noteTypeNameLike** | String | The string to search Note Type names for | No |
| **noteTypeGroupIn** | String | A list of one or more comma delimited Note Type group name values from Contingent Staffing. | No |
| **defaultNoteTypeFirst** | Numeric | A flag that indicates if the default note type will be listed first. Accepted values are 1 (yes) and 0 (no) | No |

**Returned Fields:**

| Field Name |
|---|
| **noteTypeID** |
| **noteTypeCode** |
| **noteTypeName** |
| **noteTypeDescription** |
| **noteTypeGroup** |
| **noteSubType** |
| **noteTypeSort** |
| **isActive** |
| **isDefault** |

## insertNotes

**Description:** Inserts a set of note records tied to a particular temp or client. Requires a root node of **<noteRecords>** and one or more **<noteRecord>** sub-nodes. Each argument listed below is then a node of **<noteRecord>**. **Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **noteTypeId** | Numeric | A valid Note Type Id from Contingent Staffing that is appropriate for the entity the note is assigned to | Yes |

| | | | |
|---|---|---|---|
| **noteType** | String | A valid Note Type Name from Contingent Staffing that is appropriate for the NoteTypeID. | Yes |
| **tempID** | Numeric | A temp ID from Contingent Staffing. Either tempID or clientID is needed. | No |
| **clientID** | Numeric | A client ID from Contingent Staffing. Either tempID or clientID is needed. | No |
| **OrderID** | Numeric | An order ID from Contingent Staffing | No |
| **lt_orderid** | Numeric | A long-term order ID from Contingent Staffing | No |
| **ServiceID** | Numeric | A service ID from Contingent Staffing | No |
| **ServicePaymentsID** | Numeric | A service payments ID from Contingent Staffing | No |
| **Status** | String | A valid note status from Contingent Staffing | No |
| **dateNoteRegarding** | Date | A valid date that should be assigned to the note | No |
| **notetypecode** | String | The code that is associated with the noteTypeId submitted | No |
| **note** | String | The note to be saved | |
| **MakeTaskYN** | String | Indicates if the note is a task. Accepts "yes" or "no" | No |
| **TaskDueDate** | Date | If MakeTaskYN is "yes", the task's due date | No |
| **TaskStatusID** | Numeric | The ID of the task status from Contingent Staffing associated with the task | No |
| **TaskPriorityID** | Numeric | The ID of a task priority from Contingent Staffing associated with the task | No |
| **TaskAssignID** | String | A list of one or more comma delimited ID of a user from Contingent Staffing to associate to the task.<br>Required when MakeTaskYN is set to 'yes' | No |
| **MultipleTasks** | String | Indicates to create separate task for each user. Accepts "yes" or "no". | No |

| | | | |
|---|---|---|---|
| **VoidReason** | String | The reason an order or long-term order was voided from Contingent Staffing | No |
| **pointvalue** | Numeric | A point value to assign to the note | |
| **IsPrivateNoteYN** | String | A flag to indicate if the note is private: “yes” or “no” | No |
| **ClientContactID** | String | The ID of a client contact to associate with the note | No |
| **NoteReadYN** | String | A flag to indicate if the note was read: “yes” or “no” | No |
| **NoteReadUser** | String | The username of a user who read the note | No |
| **NoteReadYN_CA** | String | A flag to indicate if the note was ready from client access: “yes” or “no” | No |
| **NoteReadUser_CA** | String | The username of the client access user who read the note | No |
| **SubmissionID** | Numeric | The ID of a submission associated with the note | No |
| **VendorID** | Numeric | The ID of a vendor associated with the note | No |
| **EmailAssignees** | String | A flag to indicate if assignees should receive emails on this note<br>access: “yes” or “no” | No |
| **EmailAssignor** | String | A flag to indicate if assignor should receive emails on this note<br>access: “yes” or “no” | No |
| **customMessageID** | Numeric | The ID of a custom message associated with the note | No |
| **PackageID** | Numeric | The ID of the package to be associated with the note | No |

**Returned Fields:**

| **Field Name** |
|---|
| **success** |
| **noteId** |

| message |
| --- |

## getNotes

**Description:** Returns Notes based on the submitted criteria.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **tempIdIn** | Numeric | A comma-separated list of temp IDs to filter notes by | No |
| **clientIdIn** | Numeric | A comma-separated list of client IDs to filter notes by | No |
| **orderIdIn** | Numeric | A comma-separated list of order IDs to filter notes by | No |
| **lt_orderIdIn** | Numeric | A comma-separated list of long-term order IDs to filter notes by | No |
| **dateTimeCreatedBegin** | DateTime | A start date and time to filter notes by for the date created | No |
| **dateTimeCreatedEnd** | DateTime | An end date and time to filter notes by for the date created | No |
| **dateTimeModifiedBegin** | DateTime | A start date and time to filter notes by for the date modified | No |
| **dateTimeModifiedEnd** | DateTime | An end date and time to filter notes by for the date modified | No |
| **noteTypeIdIn** | Numeric | A comma-separated list of note type IDs to filter the notes by | No |
| **makeTaskYN** | String | A string of either "yes" or "no" used to filter notes by whether it is a task | No |
| **taskDueDateBegin** | Date | A start date from which to filter notes for the date a task is due | No |
| **taskDueDateEnd** | Date | An end date from which to filter notes for the date a task is due | No |
| **taskStatusIdIn** | Numeric | A comma-separated list of task status IDs to filter the notes by | No |
| **taskPriorityIdIn** | Numeric | A comma-separated list of task priority IDs to filter the notes by | No |

| | | | |
|---|---|---|---|
| **userIDCIn** | Numeric | A comma-separated list of "created by" user IDs to filter the notes by | No |
| **userIDMIn** | Numeric | A comma-separated list of "modified by" user IDs to filter the notes by | No |
| **dateTimeCompletedBegin** | DateTime | A start date time to filter tasks by when they were completed | No |
| **dateTimeCompletedEnd** | DateTime | An end date time to filter tasks by when they were completed | No |
| **submissionIdIn** | Numeric | A comma-separated list of submission IDs to filter the notes by | No |
| **vendorIdIn** | Numeric | A comma-separated list of vendor IDs to filter the notes by | No |
| **packageIdIn** | Numeric | A comma-separated list of package IDs to filter the notes by | No |

**Returned Fields:**

| Field Name |
|---|
| **noteId** |
| **tempId** |
| **clientId** |
| **orderId** |
| **lt_orderId** |
| **dateTimeCreated** |
| **dateTimeModified** |
| **noteTypeId** |

**noteTypeCode**

**noteTypeName**

**note**

**makeTaskYN**

**taskDueDate**

**taskStatusId**

**taskPriorityId**

**taskAssignId**

**dateTimeCompleted**

**completedBy**

**userIDC**

**userIDM**

**submissionId**

**vendorId**

**packageId**

## getWorkTypes

**Description:** Returns work types.

**Returned Fields:**

Field Name

**workTypeID**

**workTypeName**

**workTypeDescription**

# Section: Temps/Workers

## getEducationHistory

**Description:** Retrieves a data set of education records tied to a particular temp.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp whose education history you wish to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **educationHistoryId** |
| **createdDate** |
| **createdUserId** |
| **institution** |
| **courseOfStudy** |
| **graduationDate** |
| **degree** |
| **campusLocation** |
| **campusPhone** |
| **startDate** |
| **designation** |
| **notes** |

## getTempGenders

**Description:** Returns a data set of genders that are assignable to a temp in CTM.

**Arguments:** No arguments.

**Returned Fields:**

| Field Name |
|---|
| **genderName** |

## getTempPaySchedules

**Description:** Returns a data set of pay schedules that can be used to populate a temp's pay schedule. Please note this typically only applies to customers with the CTM Advanced Paychecks v2 module.

**Arguments:** No arguments.

**Returned Fields:**

| Field Name |
|---|
| **tempPayScheduleId** |
| **tempPaySchedule** |

## getTemps

**Description:** Retrieves a data set of temp records based on filter criteria.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempIdIn** | Numeric List | A list of temp Ids to filter the results against.<br>*Note: For performance reasons, resume data is ONLY returned when using tempIdIn. If this parameter is not used, then blank fields are returned for resume data. | No |
| **employeeIdIn** | String List | Filter temps that have an employee ID contained in this list. | No |
| **emailLike** | String | DEPRECATED Filter temps that have an email address that starts with this value. | No |
| **emailStartsWith** | String | Filter temps that have an email address that starts with this value. | No |
| **emailEndsWith** | String | DEPRECATED Filter temps that have an email address that starts with this value. | No |

| | | | |
|---|---|---|---|
| **firstNameLike** | String | DEPRECATED Filter temps that have a first name that starts with this value. | No |
| **firstNameStartsWith** | String | Filter temps that have a first name that starts with this value. | No |
| **lastNameLike** | String | DEPRECATED Filter temps that have a last name that starts with this value. | No |
| **lastNameStartsWith** | String | Filter temps that have a last name that starts with this value. | No |
| **statusIn** | String List | Filter temps that have a status contained in this list. | No |
| **regionIdIn** | Numeric List | Filter temps whose home region is in the specified list. | No |
| **peopleSoftIdIn** | Numeric List | Returns temps with the ids in the specified list. | No |
| **orderBy1** | String | First order by column. Valid values: orderId, status, shiftStartTime, clientName, orderSpecialty, orderCertification, floor, orderType, city, state. Defaults to orderId. | No |
| **orderByDirection1** | String | Direction of first order by. Valid values: ASC, DESC. Defaults to ASC. | No |
| **orderBy2** | String | Second order by column. See orderBy1 for valid values. | No |
| **orderByDirection2** | String | Direction of second order by. See orderByDirection1 for valid values. | No |
| **orderBy3** | String | Third order by column. See orderBy1 for valid values. | No |
| **orderByDirection3** | String | Direction of third order by. See orderByDirection1 for valid values. | No |
| **dateCreatedStart** | Date | Filter records where created date starts with this date. Used with the dateCreatedEnd argument. | No |
| **dateCreatedEnd** | Date | Filter records where created date ends with this date. Used with the | No |

| | | | |
|---|---|---|---|
| | | dateCreatedStart argument. Includes records through 11:59pm of this date. | |
| **dateModifiedStart** | Date | Filter records where created date starts with this date. Used with the dateModifiedEnd argument. | No |
| **dateModifiedEnd** | Date | Filter records where modified date ends with this date. Used with the dateModifiedStart argument. Includes records through 11:59pm of this date. | No |
| **maidenNameLike** | String | Filter temps that have a maiden name that starts with this value. | No |
| **phoneNumber** | String | Filter temps with the provided phone number across the following fields<br><br>Home Phone, Work Phone, Cell Phone, Other Phone, Pager<br><br>And it supports E.164 phone format | No |

**Returned Fields:**

| Field Name |
|---|
| **tempId** |
| **homeRegion** |
| **firstName** |
| **lastName** |
| **middleName** |
| **maidenName** |
| **Nickname** |
| **Address** |
| **address2** |
| **City** |
| **State** |
| **Zip** |

| |
|---|
| **Country** |
| **address_2** |
| **address2_2** |
| **city_2** |
| **state_2** |
| **zip_2** |
| **phoneNumber** |
| **phoneNumber_2** |
| **workPhone** |
| **cell_phone** |
| **otherPhone** |
| **Pager** |
| **Fax** |
| **Email** |
| **email2** |
| **emergencyContact** |
| **emergencyPhone** |
| **emergencyRelationship** |
| **Status** |
| **tempType** |
| **Ssn** |
| **dateOfBirth** |
| **Gender** |
| **Race** |
| **dateHire** |
| **referralSourceId** |
| **referredByName** |

| |
|---|
| **Recruiter** |
| **staffingSpecialist** |
| **complianceManagerID** |
| **employeeId** |
| **Certification** |
| **Specialty** |
| **yearsExp** |
| **Resume*** |
| **resumeHtml*** |
| **dateRehire** |
| **maritalStatus** |
| **employedAt** |
| **dateTimeCreated** |
| **dateTimeModified** |
| **veteranStatus** |
| **prnTravel (Deprecated)** |
| **workType** |
| **paySchedule** |
| **adpId** |
| **peachtreeId (Will not be available with PeopleSoft modules)** |
| **peopleSoftPayGroup (Must have PeopleSoft modules)** |
| **peoplesoftId** |
| **sendMassEmails** |
| **howPay** |
| **howPayAmount** |
| **howPayAmount_Bill** |

| |
|---|
| **burdenAmount** |
| **burdenType** |
| **firstWorkedDate** |
| **userIDM** |
| **modifiedBy** |
| **travelContractLocationPrefs** |
| **travelAvailabilityDate** |

*NOTE: FOR PERFORMANCE REASONS, RESUME DATA IS ONLY RETURNED WHEN USING TEMPIDIN. IF THIS PARAMETER IS NOT USED, THEN BLANK NODES ARE RETURNED FOR RESUME DATA.

## getTempReferences

**Description:** Retrieves a data set of reference records tied to a particular temp.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp whose references you wish to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **referenceId** |
| **referenceName** |
| **createdDate** |
| **createdUserId** |
| **title** |
| **phoneNumber** |
| **email** |
| **facility** |
| **address** |
| **address2** |
| **city** |

| |
|---|
| **state** |
| **zip** |
| **facilityPhoneNumber** |
| **fax** |
| **unit** |
| **typeOfEmployer** |
| **notes** |
| **unitSize** |
| **patientNurseRatio** |
| **workedFromDate** |
| **workedToDate** |

## getTempStatuses

**Description:** Returns a data set of statuses a temp may have in CTM.

**Arguments:** No arguments.

**Returned Fields:**

| Field Name |
|---|
| **statusId** |
| **statusType** |
| **statusName** |
| **statusDescription** |
| **statusSortOrder** |
| **isActive** |
| **dtc** |
| **dtm** |
| **userIdc** |
| **userIdm** |
| **isSystem** |

## getFederalTaxParameters

**Description:** Returns a data set of 2020-W4 Federal Tax Parameters if the temp has them.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp whose federal tax parameters you wish to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **tempId** |
| **filingStatus** |
| **isResident** |
| **isExempt** |
| **Two_Jobs** |
| **Dependents_Amt** |
| **Other_income** |
| **Deductions** |
| **additionalWithholding** |
| **W4_2020** (returns FALSE if the there is no 2020 tax record) |

## getWorkHistory

**Description:** Retrieves a data set of work history records tied to a particular temp.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp whose work history you wish to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **workHistoryId** |
| **facility** |

| |
|---|
| **createdDate** |
| **startDate** |
| **endDate** |
| **createdUserId** |
| **typeOfEmployer** |
| **title** |
| **rate** |
| **address** |
| **address2** |
| **city** |
| **state** |
| **zip** |
| **supervisorName** |
| **supervisorTitle** |
| **supervisorPhone** |
| **unit** |
| **unitDescription** |
| **level** |
| **beds** |
| **travel** |
| **reasonForLeaving** |
| **agencyName** |
| **agencyPhone** |
| **areaWorked** |
| **percentTime** |
| **Capacity** |
| **chargeExperience** |

| |
|---|
| **averageCaseLoad** |
| **shiftWorked** |
| **shiftEvaluation** |
| **workType** |
| **Teaching** |

## getTempComplianceForShift

**Description:** Returns Boolean for whether a given Temp is in compliance for a given shift/order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to check compliance on | Yes |
| **orderId** | Numeric | The ID of the order to check compliance on | Yes |
| **showNonCompliantMessages** | Boolean | Whether or not to return out-of-compliance credential requirements for the Temp/Order combination<br>*ie: CredentialName (ReqID: X) Refuse* | No |

**Returned Fields:**

| Field Name |
|---|
| **tempId** |
| **orderId** |
| **isCompliant** |
| **nonCompliantRequirements** |

## getTempOrientationStatusForClient

**Description:** Returns the Orientation Status of the given Temp with the given Client and the client's requirement for Orientation.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **tempId** | Numeric | The ID of the temp to check its Orientation Status for client | Yes |
| **clientId** | Numeric | The ID of the client to check if it Requires Orientation | Yes |

**Returned Fields:**

| Field Name |
| --- |
| **tempId** |
| **clientId** |
| **clientRequiresOrientation** |
| **enforcementRule** |
| **isOriented** |

## getTempSchedulingWarningsForShift

**Description:** Returns the doubleBooking, doubleShift and Overtime Warnings of a given Temp for a given shift/order.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **tempId** | Numeric | The ID of the temp to check its Scheduling Status | Yes |
| **orderId** | Numeric | The ID of the order to check if it will be a doubleBooking, doubleShift, Overtime | Yes |

**Returned Fields:**

| Field Name |
| --- |
| **tempId** |
| **orderId** |
| **doubleBookingWarning** |
| **doubleShiftWarning** |
| **overtimeWarning** |

## getTempRequestForShift

**Description:** This method supports the retrieval of a Temp's Request status for a specific shift.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to check whether temp has requested for the given order. | Yes |
| **orderId** | Numeric | The ID of the order to check the given temp has requested for this order. | Yes |

**Returned Fields if a request record is found for thr given Temp and Order Combination:**

| Field Name |
|---|
| **tempId** |
| **orderId** |
| **dateCreated** |
| **isRejected** |

**Returned Fields if a request record is not found for the given Temp and Order Combination:**

| Field Name |
|---|
| **Message** |

## getFacilityValuesForTemp

**Description:** This method supports returns the Facility Association values for a given temp and facility

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to fetch associated facility values | Yes |
| **clientId** | Numeric | The ID of the client to fetch facility values | Yes |

**Returned Fields if a request record is found for the given Temp and Order Combination:**

| Field Name |
|---|
| **tempName** |
| **clientName** |
| **isOriented** |
| **statusNone** |
| **statusPreferred** |
| **statusDNR** |
| **FacilityTempID** |
| **Note** |

**Returned Fields if a request record is not found for the given Temp and Client Combination:**

| Field Name |
|---|
| **Message** |

## insertEducationHistory

**Description:** Inserts a set of education history records tied to a particular temp. Requires a root node of **<educationHistoryRecords>** and one or more **<educationHistoryRecord>** sub-nodes. Each argument listed below is then a node of **<educationHistoryRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to tie these education history records against. | Yes |
| **institution** | String | The name of the institution attended. | Yes |
| **courseOfStudy** | String | The name of the temp's primary course of study. | Yes |
| **graduationDate** | DateTime | The date the temp graduated. | Yes |
| **degree** | String | Description of the degree earned. | Yes |
| **campusLocation** | String | The location of the campus attended. | No |
| **campusPhone** | String | The phone number to the campus. | No |

| | | | |
|---|---|---|---|
| **startDate** | DateTime | The date/time the temp began their education here. | No |
| **designation** | String | | No |
| **notes** | String | Additional information. | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **educationHistoryId** |
| **Message** |

## insertTempRecords

**Description:** Inserts up to a maximum of 200 temp records into CTM. Requires a root node of **<tempRecords>** and one or more **<tempRecord>** sub-nodes. Each argument listed below is then a node of **<tempRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **firstName** | String | The temp's first name. | Yes |
| **lastName** | String | The temp's last name. | Yes |
| **homeRegion** | Numeric | The temp's primary region. This is the region ID from CTM and can be obtained by the data service **getRegions.** | Yes |
| **Status** | String | The temp's status in CTM. This is one of the valid statuses from CTM and can be obtained by the data service **getTempStatuses.** | Yes |
| **middleName** | String | The temp's middle name. | No |
| **employeeId** | String | A user definable ID field. | No |

| | | | |
|---|---|---|---|
| **Ssn** | String | The temp's social security number. | No |
| **Address** | String | The temp's primary address. | No |
| **address2** | String | Second line for the temp's primary address. | No |
| **City** | String | The temp's primary address city. | No |
| **State** | String | The primary address state. | No |
| **Zip** | String | The primary address postal code. | No |
| **Country** | String | The primary address country. | No |
| **address_2** | String | The temp's secondary address. | No |
| **address2_2** | String | The secondary address second line. | No |
| **city_2** | String | The secondary address city. | No |
| **state_2** | String | The secondary address state. | No |
| **zip_2** | String | The secondary address postal code. | No |
| **country_2** | String | The secondary address country. | No |
| **phoneNumber** | String | The temp's primary phone number. | No |
| **phoneNumber_2** | String | The temp's secondary phone number. | No |
| **workPhone** | String | The temp's work phone number. | No |
| **Fax** | String | The temp's fax number. | No |

| | | | |
|---|---|---|---|
| **Pager** | String | The temp's pager number. | No |
| **cell_phone** | String | The temp's cell phone number. | No |
| **otherPhone** | String | An additional phone number. | No |
| **Specialty** | String List | A comma-delimited list of CTM specialties that this temp has. Valid CTM specialties can be obtained by the data service **getSpecs.** ***Note that this field takes the specialty NAMES, not the IDs.*** | Yes |
| **Certification** | String List | A comma-delimited list of CTM certification that the temp has (discipline). Valid CTM certifications can be obtained by the data service **getCerts.** The first certification in the list is marked as **Primary Certification.** ***Note that this field takes the certification name, not the ID.*** | Yes |
| **dateHire** | Date/Time | A valid date/time string for the temp's hire date. | No |
| **Notes** | String | General notes. | No |
| **notes2** | String | Secondary notes. | No |
| **payNotes** | String | Notes regarding the pay of a temp. | No |
| **Email** | String | The temp's email address. | No |
| **email2** | String | The temp's secondary email address. | No |

| | | | |
|---|---|---|---|
| **Gender** | String | The temp's gender. This must be a valid gender from CTM and can be obtained by the data service **getTempGenders.** | No |
| **dateOfBirth** | Date/Time | The temp's date of birth. | No |
| **dateTerminated** | Date/Time | The temp's termination date. | No |
| **emergencyContact** | String | The name of an emergency contact for the temp. | No |
| **emergencyPhone** | String | The phone number for an emergency contact. | No |
| **emergencyRelationship** | String | The relationship to the temp of this emergency contact. | No |
| **Recruiter** | Numeric | The ID of the CTM user who is this temp's recruiter. This ID can be obtained from the **getActiveUsers** data service. | No |
| **staffingSpecialist** | Numeric | The ID of the CTM user who is this temp's staffing specialist. This ID can be obtained from the **getActiveUsers** data service. | No |
| **complianceManagerID** | Numeric | The ID of the CTM user who is this temp's compliance manager. This ID can be obtained from the **getActiveUsers** data service. | |

| | | | |
|---|---|---|---|
| **yearsExperience** | Numeric | A number indicating the years of experience held by the temp. | No |
| **Race** | String | The temp's race. This must be a valid race from CTM and can be obtained by the data service **getRaces.** | No |
| **referredByName** | String | A name of someone or place (or anything really) that referred this temp. | No |
| **referralSourceId** | Numeric | The ID of a referral source, which can be obtained from the **getActiveReferralSources** data service. | No |
| **Resume** | String | Resume information. Expects HTML. | No |
| **prnTravel (Deprecated)** | Numeric | A flag indicating the following:<br><br>0 = PRN<br><br>1 = Travel/Contract<br><br>2 = Both PRN & Travel | No |
| **workType** | Numeric | This field replaces prnTravel and is mutually exclusive with prnTravel. If prnTravel is passed instead of workType, it will be translated to workType. There is a new endpoint called getWorkTypes to get a list of available workTypes. | No |
| **veteranStatus** | Numeric | The ID of a veteran status. | No |

| | | | |
|---|---|---|---|
| **paySchedule** | Numeric | The ID of a temp pay schedule. | No |
| **Peoplesoftid** | String | The ID that associates a temp record with PeopleSoft. | No |
| **peopleSoftPayGroup** | String | The PeopleSoft Pay Group identifier that is associated with this temp record.<br>**Note: Only available with People Soft Modules.** | No |
| **peachtreeId** | Numeric | The ID that associates a temp record with a unique identifier from Peachtree.<br>**Note: Not available with People Soft Modules.** | No |
| **tax_fed_filingstatus** | Numeric | Federal tax filing status<br>1 = Single<br>2 = Married<br>3 = Head of Household<br>4 = Supplemental<br>0 = Exempt | No |
| **tax_fed_allowances** | Numeric | Federal tax allowances | No |
| **tax_fed_additional** | Numeric | Federal tax additional withholding amount | No |
| **howPay** | String | Allowed Values:<br>Auto<br>FlatPay<br>empty string | No |
| **howPayAmount** | Numeric | The amount for how pay. | No |
| **howPayAmount_Bill** | Numeric | The amount for how pay bill. | No |
| **maidenName** | String | The temp's maiden name. | No |

| | | | |
|---|---|---|---|
| **burdenAmount** | Numeric | The amount of the temp's burden | No |
| **burdenType** | String | Must be either "dollar" or "percent" | No |
| **dateReHire** | Date/Time | A valid date / time string for the temp's re hire date. | |
| **applicantExperience** | String | Must be either "applicant" or "worker". Only available with the Single Worker Portal Module. | No |
| **travelContractLocationPrefs** | String | A comma separated list of state abbreviation values with no spaces or extra characters between the commas. The list of valid state abbreviations can be obtained by the data service **getStates**. | No |
| **travelAvailabilityDate** | Date/Time | The temp's travel availability date. | No |
| **excludeFromApplicationStartAutoAssign** | Boolean | If this temp will be or is a WFP user and they have not created their WFP Account yet, if this value gets sent in as TRUE, then this temp will NOT be assigned any of the 'Application Start' auto-assign credentials. | No |
| **subcontractorId** | Numeric | the value must match to an active status subcontract supplier record. | No |

| | | | |
|---|---|---|---|
| **TempType** | String | User must have temp type permission to add new temp type | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **tempId** |
| **message** |
| **firstName** |
| **lastName** |
| **Matches (if Enforce Temp Duplication Rules is enabled)** |
| **Duplicates (if Enforce Temp Duplication Rules is enabled)** |

## insertTempCandidate (Deprecated)

**Description:** The **insertTempCandidate function is now deprecated**, as it inserted a temp into Staffing and Credentialing (RSS) and used Credentialing's auto-assign feature.

By the end of Q1 2023 Credentialing is being deprecated as it has been replaced by Workforce Portal, the modern solution to the functionality that Credentialing presented.

**Instead, users should use insertTempRecords**, which inserts a temp into Staffing and Workforce Portal and uses Workforce Portal's auto-assign feature.

## insertTempReferences

**Description:** Inserts one or more professional reference records tied to a specified temp by ID. Requires a root node of **<referenceRecords>** and one or more **<referenceRecord>** sub-nodes. Each argument listed below is then a node of **<referenceRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to tie these professional reference records against. | Yes |
| **referenceName** | String | The name of the specified reference. | Yes |
| **title** | String | The title of the professional reference. | No |

| | | | |
|---|---|---|---|
| **phoneNumber** | String | The phone number of the professional reference. | No |
| **email** | String | The email address of the professional reference. | No |
| **facility** | String | The facility where the reference works/worked at. | No |
| **address** | String | The address of the facility. | No |
| **address2** | String | The second line address of the facility. | No |
| **city** | String | The city where the facility resides. | No |
| **state** | String | The state of the facility. | No |
| **zip** | String | The zip code where the facility resides. | No |
| **facilityPhoneNumber** | String | The phone number to the facility. | No |
| **fax** | String | The fax number. | No |
| **unit** | String | What unit where this reference works. | No |
| **typeOfEmployer** | String | A general-purpose description for the type of employer. | No |
| **notes** | String | General purpose notes and additional information. | No |
| **unitSize** | String | The size of the unit worked in. | No |
| **patientNurseRatio** | String | The description of a ratio between patients and nurses in the given unit. | No |
| **workedFromDate** | Date | Start date of this reference. | No |
| **workedToDate** | Date | End date of this reference. | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **referenceId** |
| **message** |

## insertWorkHistory

**Description:** Inserts a set of work history records tied to a specified temp in CTM.  Requires a root node of **<workHistoryRecords>** and one or more **<workHistoryRecord>** sub-nodes. Each argument listed below is then a node of **<workHistoryRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to tie these work history records against. | Yes |
| **facility** | String | The name of the facility where worked. | Yes |
| **startDate** | DateTime | The start of the date worked. | Yes |
| **endDate** | DateTime | The end of the date worked. If no endDate is passed in, the system will list this history record as 'Present' for the temp. | No |
| **title** | String | The temp's title at this facility. | No |
| **rate** | String | The temp's rate of pay. | No |
| **address** | String | The address of the facility. | No |
| **address2** | String | The second line address of the facility. | No |
| **city** | String | The city where the facility resides. | No |
| **state** | String | The state of the facility. | No |
| **zip** | String | The zip code where the facility resides. | No |
| **supervisorName** | String | The name of the temp's supervisor at this facility. | No |
| **supervisorTitle** | String | The title of the supervisor at this facility. | No |
| **supervisorPhone** | String | The phone number of the supervisor at this facility. | No |
| **unit** | String | What unit at this facility where the temp worked. | No |
| **unitDescription** | String | The description of the unit. | No |
| **level** | String | | No |

| | | | |
|---|---|---|---|
| **beds** | String | The number of beds in the unit/facility where the temp worked. | No |
| **travel** | Boolean | True/False indicating that this assignment was a travel assignment. | No |
| **reasonForLeaving** | String | The reason for leaving this assignment. | No |
| **agencyName** | String | The name of the agency that placed this job. | No |
| **agencyPhone** | String | The phone number for this agency. | No |
| **areaWorked** | String | The area in which the temp worked. | No |
| **percentTime** | String | Percentage of time spent in this area. | No |
| **capacity** | String | The capacity in which the temp served in this job. | No |
| **chargeExperience** | String | Indicate any charge nurse experience. | No |
| **averageCaseLoad** | String | A description of the average case load for this position. | No |
| **workType** | String | | No |
| **teaching** | Boolean | Indicates True/False if the assignment involved a teaching role. | No |
| **typeOfEmployer** | String | Type of employer | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **workHistoryId** |
| **message** |

## updateTempRecords

**Description:** Takes a set of records with Temp Ids and updates the fields specified in the record. Requires a root node of **<tempRecords>** and one or more **<tempRecord>** sub-nodes. Each argument listed below is then a node of **<tempRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp record to update. | Yes |
| **firstName** | String | The temp's first name. | No |
| **lastName** | String | The temp's last name. | No |
| **homeRegion** | Numeric | The temp's primary region. This is the region ID from CTM and can be obtained by the data service **getRegions.** | No |
| **Status** | String | The temp's status in CTM. This is one of the valid statuses from CTM and can be obtained by the data service **getTempStatuses.** | No |
| **middleName** | String | The temp's middle name. | No |
| **employeeId** | String | A user definable ID field. | No |
| **Ssn** | String | The temp's social security number. | No |
| **Address** | String | The temp's primary address. | No |
| **address2** | String | Second line for the temp's primary address. | No |
| **City** | String | The temp's primary address city. | No |
| **State** | String | The primary address state. | No |
| **Zip** | String | The primary address postal code. | No |
| **Country** | String | The primary address country. | No |
| **address_2** | String | The temp's secondary address. | No |

| | | | |
|---|---|---|---|
| **address2_2** | String | The secondary address second line. | No |
| **city_2** | String | The secondary address city. | No |
| **state_2** | String | The secondary address state. | No |
| **zip_2** | String | The secondary address postal code. | No |
| **country_2** | String | The secondary address country. | No |
| **phoneNumber** | String | The temp's primary phone number. | No |
| **phoneNumber_2** | String | The temp's secondary phone number. | No |
| **workPhone** | String | The temp's work phone number. | No |
| **Fax** | String | The temp's fax number. | No |
| **Pager** | String | The temp's pager number. | No |
| **cell_phone** | String | The temp's cell phone number. | No |
| **otherPhone** | String | An additional phone number. | No |
| **Specialty** | String List | A comma-delimited list of CTM specialties that this temp has. Valid CTM specialties can be obtained by the data service **getSpecs. *Note that this field takes the specialty NAMES, not the IDs.*** | No |
| **Certification** | String List | A comma-delimited list of CTM certification that the temp has (discipline). Valid CTM certifications | No |

| | | | |
|---|---|---|---|
| | | can be obtained by the data service **getCerts.** The first certification in the list is marked as **Primary Certification.** ***Note that this field takes the certification name, not the ID.*** | |
| **dateHire** | Date/Time | A valid date/time string for the temp's hire date. | No |
| **Notes** | String | General notes. | No |
| **notes2** | String | Staffing notes. | No |
| **payNotes** | String | Notes regarding the pay of a temp. | No |
| **Email** | String | The temp's email address. | No |
| **email2** | String | The temp's secondary email address. | No |
| **Gender** | String | The temp's gender. This must be a valid gender from CTM and can be obtained by the data service **getTempGenders.** | No |
| **dateOfBirth** | Date/Time | The temp's date of birth. | No |
| **dateTerminated** | Date/Time | The temp's termination date. | No |
| **emergencyContact** | String | The name of an emergency contact for the temp. | No |
| **emergencyPhone** | String | The phone number for an emergency contact. | No |
| **emergencyRelationship** | String | The relationship to the temp of this emergency contact. | No |

| | | | |
|---|---|---|---|
| **Recruiter** | Numeric | The ID of the CTM user who is this temp's recruiter. This ID can be obtained from the **getActiveUsers** data service. | No |
| **staffingSpecialist** | Numeric | The ID of the CTM user who is this temp's staffing specialist. This ID can be obtained from the **getActiveUsers** data service. | No |
| **complianceManagerID** | Numeric | The ID of the CTM user who is this temp's compliance manager. This ID can be obtained from the **getActiveUsers** data service. | |
| **yearsExperience** | Numeric | A number indicating the number of years experience this temp has. | No |
| **Race** | String | The temp's race. This must be a valid race from CTM and can be obtained by the data service **getRaces.** | No |
| **referredByName** | String | A name of someone or place (or anything really) that referred this temp. | No |
| **referralSourceId** | Numeric | The ID of a referral source, which can be obtained from the **getActiveReferralSourc es** data service. | No |
| **Resume** | String | Resume information. Expects HTML. | No |
| **prnTravel (Deprecated)** | Numeric | A flag indicating the following: | No |

| | | | |
|---|---|---|---|
| | | 0 = PRN<br><br>1 = Travel/Contract<br><br>2 = Both PRN & Travel | |
| **workType** | Numeric | This field replaces prnTravel and is mutually exclusive with prnTravel. If prnTravel is passed instead of workType, it will be translated to workType. There is a new endpoint called getWorkTypes to get a list of available workTypes. | No |
| **veteranStatus** | Numeric | The ID of a veteran status. | No |
| **paySchedule** | Numeric | The ID of a temp pay schedule. | No |
| **Peoplesoftid** | String | The ID that associates a temp record with PeopleSoft. | No |
| **peopleSoftPayGroup** | String | The PeopleSoft Pay Group identifier that is associated with this temp record.<br>**Note: Only available with People Soft Modules.** | No |
| **peachtreeId** | Numeric | The ID that associates a temp record with a unique identifier from Peachtree.<br>**Note: Not available with People Soft Modules.** | No |
| **tax_fed_filingstatus** | Numeric | Federal tax filing status<br>1 = Single | No |

| | | | |
|---|---|---|---|
| | | 2 = Married<br>3 = Head of Household<br>4 = Supplemental<br>0 = Exempt<br>**Note: This is ONLY for pre-2020 W-4 Tax parameters. For 2020 W-4 Tax parameters use the new method, setFederalTaxParameters.** | |
| **tax_fed_allowances** | Numeric | Federal tax allowances<br>**Note: This is ONLY for pre-2020 W-4 Tax parameters. For 2020 W-4 Tax parameters use the new method, setFederalTaxParameters.** | No |
| **tax_fed_additional** | Numeric | Federal tax additional withholding amount<br>**Note: This is ONLY for pre-2020 W-4 Tax parameters. For 2020 W-4 Tax parameters use the new method, setFederalTaxParameters.** | No |
| **howPay** | String | Allowed Values:<br>Auto<br>FlatPay<br>empty string | No |
| **howPayAmount** | Numeic | The amount for how pay. | No |
| **howPayAmount_Bill** | Numeric | The amount for how pay bill. | No |
| **maidenName** | String | The temp's maiden name. | No |
| **burdenAmount** | Numeric | The amount of the temp's burden | No |

| | | | |
|---|---|---|---|
| **burdenType** | String | Must be either "dollar" or "percent" | No |
| **dateReHire** | Date/Time | A valid date / time string for the temp's re hire date. | |
| **applicantExperience** | String | Must be either "applicant" or "worker". Only available with the Single Worker Portal Module. | No |
| **travelContractLocationPrefs** | String | A comma separated list of state abbreviation values with no spaces or extra characters between the commas. The list of valid state abbreviations can be obtained by the data service **getStates**. | No |
| **travelAvailabilityDate** | Date/Time | The temp's travel availability date. | No |
| **excludeFromApplicationStartAutoAssign** | Boolean | If this temp will be or is a WFP user and they have not created their WFP Account yet, if this value gets sent in as TRUE, then this temp will NOT be assigned any of the 'Application Start' auto-assign credentials.<br>If this value gets sent in as FALSE, then if this temp was being excluded before, that exclusion setting will be removed. | No |
| **subcontractorId** | Numeric | the value must match to an active status subcontract supplier record. | No |

| | | | |
|---|---|---|---|
| **TempType** | String | User must have temp type permission to add new temp type | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **tempId** |
| **Message** |
| **firstName** |
| **lastName** |
| **Matches (if Enforce Temp Duplication Rules is enabled)** |
| **Duplicates (if Enforce Temp Duplication Rules is enabled)** |

## setFederalTaxParameters

**Description:** Sets 2020-W4 Federal Tax Parameters.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp whose federal tax parameters you wish to retrieve. | Yes |
| **filingStatus** | String | Federal tax filing status (use letter abbreviation)<br>S = Single<br>M = Married<br>H = Head of Household<br>NRA = Non-Resident Alien | No |
| **twoJobs** | Boolean | Two Jobs | No |
| **dependentsAmount** | Numeric | Claim Dependents | No |
| **otherIncome** | Numeric | Other Income | No |
| **Deductions** | Numeric | Deductions | No |

| | | | |
|---|---|---|---|
| **additionalWithholding** | Numeric | Extra Withholding | No |
| **isResident** | Boolean | Is the temp a US resident | No |
| **isExempt** | Boolean | Is the temp exempt from federal tax | No |

## createTempRequestForShift

**Description:** This service is used to create a Temp request for a specific shift.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to whom creating a request for shift | Yes |
| **orderId** | Numeric | The ID of an order on which the temp can request for shift | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |
| **tempId** |
| **orderId** |
| **dateRequested** |
| **isRejected** |

## getTempConfirmationForShift

**Description:** Retrieves the Temp's confirmation information for a specific order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderId** | Numeric | The orderID to pull the Temp confirmation information for. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **orderId** |
| **clientid** |

| |
|---|
| **tempId** |
| **Tempconfirmyn** |
| **TempConfirmUserID** |
| **TempConfirmDate** |
| **TempConfirmationNote** |
| **Message** |

## deleteTempRequestForShift

**Description: This service is used to delete shift requested by a temp**

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to whom need to delete the shift. | Yes |
| **orderId** | Numeric | The ID of an order that shift need to delete. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |

## declineTempRequestForShift

**Description:** This method is used to decline/reject a specific Workforce Portal's Temp request for a specific shift.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to decline the request for specific shift | Yes |
| **orderId** | Numeric | The ID of an order on which the temp has requested for shift | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |

| Message |
|---|

## updateTempConfirmationForShift

**Description:** This method is used to updates the Temp's confrimation status for a specific shift and sends confirmation Email to a Temp based on flag passed in **sendEmail.**

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderId** | Numeric | The ID of an order to update the Temp's confirmation. | Yes |
| **tempConfirmYN** | String | Flag to indicate Temp's shift is confirmed or not.<br><br>Yes = Temp confirmed for Shift<br><br>No = Temp confirmation removed from shift | Yes |
| **tempConfirmationNote** | String | Notes to send in Temp's confirmation Email | No |
| **sendEmail** | Boolean | If TRUE, then shift confirmation notification send to Temp's email | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **message** |
| **orderId** |
| **tempId** |
| **tempConfirmYN** |
| **tempConfirmUserID** |
| **tempConfirmDate** |

## setFacilityValuesForTemp

**Description:** This method is used to set the associated facilities values for a specific temp and client**.**

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **tempId** | Numeric | The ID of the temp to set the associated facilities values for specific client | Yes |
| **clientId** | Numeric | The ID of the client to set associated facilities values for specific temp | Yes |
| **Oriented** | Boolean | When value is passed updates the temp to oriented status for specific client.<br><br>**Note**: It allows only True/False value | No |
| **facilityStatus** | String | When value is passed updates the temp to corresponding facility status for specific client.<br><br>**Note:** It allows only None/Preferred/DNR values | No |
| **facilityTempId** | String | Sets the Facility Temp Id value (for clocking / time import) for the specific temp and client | No |
| **Note** | String | Sets a note for specific temp and client in facility association row.<br><br>**Note:** Note length is limited to 200. | No |

**Returned Fields:**

| Field Name |
| --- |
| **Success** |
| **Message** |
| **tempId** |
| **clientId** |

## sendWorkforcePortalInvite

**Description:** This method is used to send the workforce portal invite to the temp/worker. This method is applicable for the sites to which workforce portal module is enabled.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **tempId** | Numeric | The ID of the temp to send the workforce portal invitation | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |
| **tempId** |

## assignWorkforcePortalItems

**Description:** This method allows users to assign Mobile Skills, Mobile eDocs, and Mobile Tests to Workforce Portal users through the ClearConnect API. Assign up to a maximum of 200 Credentials to Temps/HCS. Requires a root node of **< tempCreds>** and one or more **< tempCred>** sub-nodes.  Each argument listed below is then a node of **< tempCred>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to assign the credentials | Yes |
| **licenseid** | Numeric | The ID of the credential element. Use the getCredentialElements data service to get retrieve a data set of credential elements. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |
| **tempId** |
| **licenseid** |

## assignWorkforcePortalAutoAssignItems

**Description:** This method triggers the Auto-Assign of Mobile Skills, Mobile eDocs, and Mobile Tests based on Credential Requirements for a specified process point to a specific Workforce Portal user through the ClearConnect API. The supported process points are 'New Hire' and 'Application Start'; or if items from both process points are to be auto-assigned, both can be passed in as a comma delimited list: 'New Hire,Application Start'.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to assign the credentials | Yes |
| **autoAssignProcessPoint** | String | This needs to be either 'New Hire' or 'Application Start' or it can be both comma delimited: 'New Hire, Application Start' | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |
| **tempId** |

## updateWorkerURLTags

**Description:** This method allows users to update the url tags for a worker through the ClearConnect API. Requires tempid and a node of **<tags>** containing one or more key-value pair as subnodes.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp for updating the tags | Yes |
| **tags** | string | Tag containing key-value pair<br>Example:<br><tags><br><referredBy>Chatbot</referredBy><br><ltorderid>42345</ltorderid><br></tags> | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |
| **tempId** |

## getWorkforcePortalShiftPreferences

**Description:** Returns all workforce portal shift preferences associated with given worker ID.

| Argument | Type | Description | Required |
|---|---|---|---|
| **workerID** | Numeric | The temp ID from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **shift1** |
| **shift2** |
| **shift3** |
| **shift4** |
| **shift5** |

## getLastNotesForWorker

**Description:** Returns details of the last contact credit note and last non-contact credit note associated with given Worker ID.

| Argument | Type | Description | Required |
|---|---|---|---|
| **workerID** | Numeric | The Worker ID from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **lastContactCreditNoteTypeId** |
| **lastContactCreditNoteType** |
| **lastContactCreditNoteDetail** |

| |
|---|
| **lastContactCreditNoteCreatedOn** |
| **lastContactCreditNoteCreatedBy** |
| **lastContactCreditNoteModifiedOn** |
| **lastContactCreditNoteModifiedBy** |
| **lastNoteTypeId** |
| **lastNoteType** |
| **lastNoteDetail** |
| **lastNoteCreatedOn** |
| **lastNoteCreatedBy** |
| **lastNoteModifiedOn** |
| **lastNoteModifiedBy** |

## setOptOutForEmailAddress

**Description:** This method will set the Send Mass Emails setting in the CTM profile to No for any record found to be matching the email passed in.

| Argument | Type | Description | Required |
|---|---|---|---|
| **emailAddress** | String | The Email Address from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Message** |
| **TempIDs** |

## getLtOrderQuickApplyAssociations

**Description:** Return details for the worker associations to a CTM Long-Term Order associated with LT Order ID

| Argument | Type | Description | Required |
|---|---|---|---|
| **ltOrderID** | Numeric | The Long-Term Order ID from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **workerRequestId** |
| **quickApplyID** |
| **quickApplyApplicantName** |
| **assignmentID** |
| **email** |
| **WhenCreated** |
| **TrackingTags** |

## getLtOrderTempAssociations

**Description:** Return details for the temp associations to a CTM Long-Term Order associated with LT Order ID

| Argument | Type | Description | Required |
|---|---|---|---|
| **ltOrderID** | Numeric | The Long-Term Order ID from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **workerRequestId** |
| **tempID** |
| **TempName** |
| **assignmentID** |

| |
|---|
| **Email** |
| **WhenCreated** |
| **TrackingTags** |

## setOptOutForPhoneNumber

**Description:** This method will set the Send Text messages setting to No for any record found to be matching the phone number passed in.

| Argument | Type | Description | Required |
|---|---|---|---|
| **phoneNumber** | String | The phone number will be searched across the following fields in the CTM Temp Profile<br><br>Home Phone, Work Phone, Cell Phone, Other Phone, Pager | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Message** |
| **TempIDs** |

## getWorkforcePortalAccountStatus

**Description:** Returns workforce portal account status for the temp

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempID** | Numeric | The temp ID from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **accountStatus** |

| |
|---|
| **createdOn** |
| **applicantExperience** |

## getTempsByPhoneOrEmail

**Description:** Returns an array of TempID values in response and matched on response equal to the specific fields such as phoneNumber, cell phone and email, email2 etc.

| Argument | Type | Description | Required |
|---|---|---|---|
| **phoneNumber** | String | Filter temps with provided phone number across the following fields Home Phone, Work Phone, Cell Phone, Other Phone | No |
| **emailAddress** | String | The email address from CTM | No |

**Returned Fields:**

| Field Name |
|---|
| **TempID** |
| **MatchedOn** |

## getTempTypes

**Description:** Returns list of Temp Types values in response.

**Returned Fields:**

| Field Name |
|---|
| **tempTypes** |

# Section: Clients/Facilities

## getClients

**Description:** Retrieves a data set of client records based on filter criteria.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientIdIn** | Numeric List | A list of client Ids to filter the results by. | No |
| **clientNameLike** | String | Filter clients that have a client name containing this value. | No |
| **clientNameStartsWith** | String | Return clients whose name starts with your criteria. | No |
| **statusIn** | String List | Filter clients whose status is in the specified list. | No |
| **salesRepIn** | Numeric List | Return clients whose sales representative is in your criteria list. | No |
| **staffingSpecialistIn** | Numeric List | Return clients whose staffing specialist is in your criteria list. | No |
| **MasterClientIDIn** | Numeric List | Return clients whose masterClientId is in the specified list. | No |
| **dateCreatedStart** | Date | Filter records where created date starts with this date. Used with the dateCreatedEnd argument. | No |
| **dateCreatedEnd** | Date | Filter records where created date ends with this date. Used with the dateCreatedStart argument. Includes records through 11:59pm of this date. | No |
| **dateModifiedStart** | Date | Filter records where created date starts with this date. Used with the dateModifiedEnd argument. | No |
| **dateModifiedEnd** | Date | Filter records where modified date ends with this date. Used with the dateModifiedStart argument. Includes records through 11:59pm of this date. | No |

| | | | |
|---|---|---|---|
| **ClientStateIn** | String List | Return clients whose state abbreviation code is in the specified list. | No |
| **RegionIDIn** | Numeric List | Return clients whose regionId is in the specified list. | No |
| **billingSpecialistIn** | Numeric List | Return clients whose billingSpecialist(s) is in the specified list. | |

**Returned Fields:**

| Field Name |
|---|
| **clientId** |
| **Region** |
| **clientName** |
| **clientNumber** |
| **facilityNumber** |
| **customerType** |
| **masterClientId** |
| **Address** |
| **address2** |
| **City** |
| **State** |
| **Zip** |
| **County** |
| **Notes** |
| **notes2** |
| **billingNotes** |
| **mainPhone** |
| **mainFax** |
| **invoiceTerms** |

| |
|---|
| **invoicePoNumber** |
| **numBeds** |
| **dateTimeCreated** |
| **dateTimeModified** |
| **salesRep** |
| **staffingSpecialist** |
| **Status** |
| **clientType** |
| **Website** |
| **ClientInternalName** (This field is only returned for agencies with this functionality.) |
| **referralSourceId** |
| **referredByName** |
| **serviceLines (if Client Service Line Module is enabled)** |
| **county** |
| **contractDate** |
| **vmsClient** |
| **vmsAutoPublishOrders** |
| **defaultLunchMinutes** |
| **billingSpecialistId** |
| **billingSpecialistName** |

## getActiveClientNames

**Description:** Retrieves active facility (not master) client names and IDs.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **regionID** | Numeric | The RegionID to filter results by. | No |

**Returned Fields:**

| Field Name |
|---|
| **clientID** |
| **clientName** |

## getClientContacts

**Description:** Retrieves a data set of client contact records based on filter criteria. Client contacts are individuals who are a point of contact at a client facility.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **contactIdIn** | Numeric List | A numeric list of contact IDs whose values match your criteria. | No |
| **clientIdIn** | Numeric List | A list of client Ids to filter the results by. | No |
| **emailLike** | String | Return contacts whose email address is like your criteria. | No |
| **email2Like** | String | Return contacts whose second email address is like your criteria. | No |
| **firstNameLike** | String | Return contacts whose first name is like your criteria. | No |
| **lastNameLike** | String | Return contacts whose last name is like your criteria. | No |
| **fullNameLike** | String | Return contacts where the full first and last name is like your criteria. | No |

**Returned Fields:**

| Field Name |
|---|
| **contacted** |
| **clientId** |
| **primaryContactYN** |
| **makeBillToYN** |
| **clientName_contact** |
| **salutation** |

| |
|---|
| **firstName** |
| **lastName** |
| **mi** |
| **nickname** |
| **cc_clientName** |
| **title** |
| **workPhone** |
| **cellPhone** |
| **homePhone** |
| **otherPhone** |
| **pager** |
| **fax** |
| **email** |
| **email2** |
| **contactNote** |
| **address** |
| **address2** |
| **city** |
| **state** |
| **zip** |
| **DOB** |
| **whatAddress** |
| **dateTimeInsert** |
| **dateTimeUpdate** |
| **updateUser** |
| **secondaryBillToYN** |
| **deptNote** |

| |
|---|
| **Inactive** |
| **County** |
| **Country** |

## getClientFloors

**Description:** Retrieves a data set of client floor records based on filter criteria.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientIdIn** | Numeric List | Returns client floors where the client ID matches your list criteria. | No |
| **clientNameLike** | String | Returns client floors where the client's name is similar to your criteria. | No |
| **floorIdIn** | Numeric List | Returns client floors where the floor ID is in your list criteria. | No |
| **floorNameLike** | String | Returns client floors where the floor name is like to your criteria. | No |

**Returned Fields:**

| Field Name |
|---|
| **florid** |
| **floorName** |
| **clientId** |
| **clientName** |

## getClientRegion

**Description:** Returns the region ID for the provided client ID. If the client cannot be found zero (0) is returned.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **ClientID** | Numeric | ID of a client | Yes |

**Returned Fields:**

| Field Name |
|---|

| regionID |
|---|

## getClientBurden

**Description:** Retrieves a data set of Client Burden records based on filter criteria.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientIdIn** | Numeric List | Returns client burden where the client ID matches your list criteria. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **clientBurdenRateID** |
| **effectiveStartDate** |
| **effectiveEndDate** |
| **feeType** |
| **Fee** |
| **Perpetual** |
| **appliedToChildFacilities** |
| **ClientID** |
| **clientName** |

## insertClients

**Description:** Insert client/facility data into CTM. Requires a root node of **<clientRecords>** and one or more **<record>** sub-nodes. Each argument listed below is then a node of **<record>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientName** | String | The name of the client/facility | Yes |
| **regionId** | Numeric | The region this client is put under | Yes |
| **clientType** | String | User defined value used for organization and grouping | No |
| **facilityNumber** | String | User defined value | No |

| | | | |
|---|---|---|---|
| **masterClientId** | Numeric | ID of a client that will be this facility's master | No |
| **Address** | String | | No |
| **address2** | String | | No |
| **clientNumber** | String | Another user defined value. | No |
| **City** | String | | No |
| **State** | String | | No |
| **Zip** | String | | No |
| **Country** | String | | No |
| **Notes** | String | Notes | No |
| **notes2** | String | Staffing Notes | No |
| **billingNotes** | String | Notes useful for billing personnel | No |
| **mainPhone** | String | Primary phone number | No |
| **mainFax** | String | Primary fax number | No |
| **invoiceTerms** | String | Terms to apply to an invoice to this client | No |
| **invoicePoNumber** | String | PO number used in billing this client | No |
| **invoiceFooter** | String | Footer to apply to invoices to this client | No |
| **defaultLunchMins** | Numeric | Default number of minutes for lunches for timecards against this client | No |
| **numBeds** | Numeric | Number of beds at this facility | No |
| **salesRep** | Numeric | The user ID of the sales representative for this client | No |
| **Status** | String | The status of the client | No |
| **Website** | String | This client's website | No |
| **ClientInternalName** | String | Client Internal name for Internal use. It will be populated with the Clientname if one is not provided. This field is only | No |

| | | | |
|---|---|---|---|
| | | available to agencies with this functionality. | |
| **staffingSpecialist** | Numeric | The user ID of the staffing specialist for this facility | No |
| **referralSourceId** | Numeric | The ID of a referral source, which can be obtained from the **getActiveReferralSources** data service. | No |
| **referredByName** | String | A name of someone or place (or anything really) that referred this Client. | No |
| **contractDate** | String | The contract date for this client. | No |
| **newContractDate** | String | The new contract date for this client. | No |
| **billingSpecialist** | Numeric | The billing specialist for this client. | No |
| **county** | String | The client's county | No |
| **vmsClient** | Boolean | TRUE/FALSE Is this a vms client | No |
| **vmsAutoPublishOrders** | Boolean | TRUE/FALSE Does this client auto publish VMS orders | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **clientId** |
| **Message** |

## insertClientContacts

**Description:** Insert client contact data into CTM. Requires a root node of **<clientContacts >** and one or more **<record>** sub-nodes. Each argument listed below is then a node of **<record>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | Numeric | | Yes |

| | | |
|---|---|---|
| **firstName** | String | Yes |
| **makeBillToYN** | Boolean | No |
| **Salutation** | String | No |
| **lastName** | String | No |
| **Mi** | String | No |
| **Nickname** | String | No |
| **Title** | String | No |
| **workPhone** | String | No |
| **Cellphone** | String | No |
| **homePhone** | String | No |
| **otherPhone** | String | No |
| **Pager** | String | No |
| **Fax** | String | No |
| **Email** | String | No |
| **email2** | String | No |
| **contactNote** | String | No |
| **Address** | String | No |
| **address2** | String | No |
| **City** | String | No |
| **State** | String | No |
| **Zip** | String | No |
| **Dob** | Date | No |
| **secondaryBillToYN** | Boolean | No |
| **deptNote** | String | No |
| **County** | String | No |
| **Country** | String | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **contactId** |
| **clientId** |
| **Message** |

## updateClients

**Description:** Update existing client/facility data in CTM. Requires a root node of **<clientRecords>** and one or more **<record>** sub-nodes. Each argument listed below is then a node of **<record>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | Numeric | The ID of the client to update | Yes |
| **clientName** | String | The name of the client/facility | No |
| **regionId** | Numeric | The region this client is put under | No |
| **clientType** | String | User defined value used for organization and grouping | No |
| **facilityNumber** | String | User defined value | No |
| **masterClientId** | Numeric | ID of a client that will be this facility's master | No |
| **Address** | String | | No |
| **address2** | String | | No |
| **clientNumber** | String | Another user defined value. | No |
| **City** | String | | No |
| **State** | String | | No |
| **Zip** | String | | No |
| **Country** | String | | No |
| **Notes** | String | Notes | No |
| **notes2** | String | Staffing Notes | No |

| | | | |
|---|---|---|---|
| **billingNotes** | String | Notes useful for billing personnel | No |
| **mainPhone** | String | Primary phone number | No |
| **mainFax** | String | Primary fax number | No |
| **invoiceTerms** | String | Terms to apply to an invoice to this client | No |
| **invoicePoNumber** | String | PO number used in billing this client | No |
| **invoiceFooter** | String | Footer to apply to invoices to this client | No |
| **defaultLunchMins** | Numeric | Default number of minutes for lunches for timecards against this client | No |
| **numBeds** | Numeric | Number of beds at this facility | No |
| **salesRep** | Numeric | The user ID of the sales representative for this client | No |
| **Status** | String | The status of the client | No |
| **Website** | String | This client's website | No |
| **ClientInternalName** | String | Client Internal name for Internal use. This field is only available to agencies with this functionality. | No |
| **staffingSpecialist** | Numeric | The user ID of the staffing specialist for this facility | No |
| **referralSourceId** | Numeric | The ID of a referral source, which can be obtained from the **getActiveReferralSources** data service. | No |
| **referredByName** | String | A name of someone or place (or anything really) that referred this Client. | No |
| **contractDate** | String | The contract date for this client. | No |
| **newContractDate** | String | The new contract date for this client. | No |
| **billingSpecialist** | Numeric | The billing specialist for this client. | No |
| **county** | String | The client's county | No |
| **vmsClient** | Boolean | TRUE/FALSE The VMS status | No |

| | | | |
|---|---|---|---|
| **vmsAutoPublishOrders** | Boolean | TRUE/FALSE Does this client auto publish VMS orders | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **clientId** |
| **Message** |

## updateClientContacts

**Description:** Update client contact data in CTM. Requires a root node of **<clientContacts>** and one or more **<record>** sub-nodes. Each argument listed below is then a node of **<record>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **contactId** | Numeric | | Yes |
| **clientId** | Numeric | | No |
| **firstName** | String | | No |
| **makeBillToYN** | Boolean | | No |
| **Salutation** | String | | No |
| **lastName** | String | | No |
| **Mi** | String | | No |
| **Nickname** | String | | No |
| **Title** | String | | No |
| **workPhone** | String | | No |
| **cellPhone** | String | | No |
| **homePhone** | String | | No |
| **otherPhone** | String | | No |
| **Pager** | String | | No |
| **Fax** | String | | No |

| | | | |
|---|---|---|---|
| **Email** | String | | No |
| **email2** | String | | No |
| **contactNote** | String | | No |
| **Address** | String | | No |
| **address2** | String | | No |
| **City** | String | | No |
| **State** | String | | No |
| **Zip** | String | | No |
| **Dob** | Date | | No |
| **secondaryBillToYN** | Boolean | | No |
| **deptNote** | String | | No |
| **County** | String | | No |
| **Country** | String | | No |
| **Status** | String | Active, Prospect, Inactive | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **contactId** |
| **Message** |

## getClientConfirmationForShift

**Description:** Retrieves the client's confirmation information for a specific order.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderId** | Numeric | The orderID to pull the client confirmation information for. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **orderId** |

| |
|---|
| **Clientid** |
| **templd** |
| **ClientConfirmYN** |
| **ClientConfirmUserID** |
| **ClientConfirmDate** |
| **ClientConfirmationNote** |

## updateClientConfirmationForShift

**Description:** This method is used to update the Client's confirmation status for a specific shift and optionally send a confirmation email to the shift's Client Contact.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderId** | Numeric | The ID of an order to update the Client's confirmation. | Yes |
| **ClientId** | Numeric | The ID of a client to update the client's confirmation for an order. | Yes |
| **clientConfirmYN** | String | Flag to indicate if the Client's shift is confirmed or not.<br><br>Yes = Client confirmed for Shift<br><br>No = Client confirmation removed from shift | Yes |
| **clientConfirmationNote** | String | Notes to send in Client's confirmation Email | No |
| **clientContactIdIn** | String | If this contains a Client Contact ID or a list of Client Contact IDs, then a shift confirmation notification will send to these contacts' email addresses. | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Message** |
| **orderId** |

| |
|---|
| **clientId** |
| **clientConfirmYN** |
| **clientConfirmUserID** |
| **clientConfirmDate** |

## getPayRateForClient

**Description:** Base pay rate for client with given shift date, shift number, certification, specialty.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **ClientId** | Numeric | The ID of the client | Yes |
| **Certification** | String | The name of a certification | Yes |
| **Specialty** | string | The name of a specialty | Yes |
| **shiftdate** | date | The date of the shift | Yes |
| **shiftNumber** | Numeric | The number associated with the desired shift | Yes |
| **tempId** | Numeric | The ID of the temp | No |
| **shiftStartTime** | Time | The start time for the shift, in 24-hour format.<br>Required if shifteendtime is provided | No |
| **shiftEndTime** | Time | The end time for the shift, in 24-hour format.<br>Required if shiftstarttime is provided | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Shiftdate** |
| **Shiftid** |
| **Rate** |
| **tempId** |

## getBillRateForClient

**Description:** Base bill rate for client with given shift date, shift number, certification, speciality.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **ClientId** | Numeric | The ID of the client | Yes |
| **Certification** | String | The name of a certification | Yes |
| **Specialty** | string | The name of a specialty | Yes |
| **shiftdate** | date | The date of the shift | Yes |
| **shiftNumber** | Numeric | The number associated with the desired shift | Yes |
| **tempId** | Numeric | The ID of the temp | No |
| **shiftStartTime** | Time | The start time for the shift, in 24-hour format.<br>Required when shifteendtime is provided | No |
| **shiftEndTime** | Time | The end time for the shift, in 24-hour format.<br>Required when shiftstarttime is provided | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Shiftdate** |
| **Shiftid** |
| **Rate** |
| **tempId** |

## insertClientFloor

**Description:** Insert client/facility floor data into CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | Numeric | Id of the client to associate the floor name. | Yes |
| **floorName** | String | The name of the floor. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **floorId** |
| **message** |

# Section: Shifts

## getShifts

**Description:** Retrieves a data set of client(s) shift records based on filter criteria. The size of the data set returned varies upon the value passed the into the flag **includeAdditionalInfo**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | Integer | A single client Id to filter the results by. To retrieve *all* current shifts, set the clientId value equal to 0. | yes |
| **includeAdditionalInfo** | Boolean | Flag to indicate if additional shift details should be included in the results. Default value is FALSE. | yes |

**Returned Fields:**

The base columns returned are:

| Field Name |
|---|
| **shiftid** |
| **shiftnum** |
| **shiftName** |
| **display** |

If the **includeAdditionalInfo** flag is set TRUE, the following additional fields are included in the data set:

| Field Name |
|---|
| **Timestart** |
| **timeend** |
| **defaultYN** |
| **sortOrder** |
| **defaultDaysPerWeek** |
| **hoursPerWeek** |
| **otHoursPerWeek** |

# Section: CTM Staffing Users

## getActiveUsers

**Description:** Retrieves a data set of active CTM users.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderBy** | String | The field to order the results by. Valid values are **firstname, lastname, username**, and **userid**. | No |
| **lastFirstNameLike** | String | Allows you to filter results by searching for users where the combination of "lastname, firstname" is similar to your search criteria. | No |
| **firstLastNameLike** | String | Allows you to filter results by searching for users where the combination of "firstname lastname" is similar to your search criteria. | No |
| **userNameLike** | String | Allows you to filter results by searching for users where the username is similar to your search criteria. | No |
| **userIdIn** | Numeric List | A comma delimited list of user IDs to filter your result against. Ex. 1,5,14 | No |
| **firstNameLike** | String | Returns users whose first name is similar to your criteria | No |
| **lastNameLike** | String | Returns users whose last name is similar to your criteria | No |

**Returned Fields:**

| Field Name |
|---|
| **userId** |
| **firstName** |
| **lastName** |
| **userName** |
| **title** |

| |
|---|
| **email** |
| **regionID** |
| **lobID** |

## getInactiveUsers

**Description:** Retrieves a data set of inactive CTM users.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderBy** | String | The field to order the results by. Valid values are **firstname, lastname, username**, and **userid**. | No |
| **lastFirstNameLike** | String | Allows you to filter results by searching for users where the combination of "lastname, firstname" is similar to your search criteria. | No |
| **firstLastNameLike** | String | Allows you to filter results by searching for users where the combination of "firstname lastname" is similar to your search criteria. | No |
| **userNameLike** | String | Allows you to filter results by searching for users where the username is similar to your search criteria. | No |
| **userIdIn** | Numeric List | A comma delimited list of user IDs to filter your result against. Ex. 1,5,14 | No |
| **firstNameLike** | String | Returns users whose first name is similar to your criteria | No |
| **lastNameLike** | String | Returns users whose last name is similar to your criteria | No |

**Returned Fields:**

| Field Name |
|---|
| **userId** |
| **firstName** |
| **lastName** |

| |
|---|
| **username** |
| **title** |
| **email** |
| **regionID** |
| **lobID** |

## getUsers

**Description:** Retrieves a data set of active and inactive CTM users.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **orderBy** | String | The field to order the results by. Valid values are **firstname, lastname, username**, and **userid**. | No |
| **lastFirstNameLike** | String | Allows you to filter results by searching for users where the combination of "lastname, firstname" is similar to your search criteria. | No |
| **firstLastNameLike** | String | Allows you to filter results by searching for users where the combination of "firstname lastname" is similar to your search criteria. | No |
| **userNameLike** | String | Allows you to filter results by searching for users where the username is similar to your search criteria. | No |
| **userIdIn** | Numeric List | A comma delimited list of user IDs to filter your result against. Ex. 1,5,14 | No |
| **firstNameLike** | String | Returns users whose first name is similar to your criteria | No |
| **lastNameLike** | String | Returns users whose last name is similar to your criteria | No |
| **roleIDIn** | Numeric List | A comma delimited list of user role IDs to filter your result against. | No |

**Returned Fields:**

| Field Name |
|---|
| **userId** |
| **firstName** |
| **lastName** |
| **userName** |
| **title** |
| **email** |
| **status** |
| **regionID** |
| **roleName** |
| **userRoleID** |
| **phoneNumber** |
| **phoneNumberExt** |
| **lobID** |

## insertUser

**Description:** Inserts User data into CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **firstName** | String | The user's first name in CTM. | Yes |
| **lastName** | String | The user's last name in CTM. | Yes |
| **usersUserName** | String | The user's username in CTM. | Yes |
| **status** | String | The user's status which can be set either "Active" or "Inactive" in CTM | Yes |
| **email** | String | The user's email address in CTM. | Yes |
| **clearConnectAccess** | Boolean | The clearConnectAccess can be set as "0" or "1", 0 is passed to set as inactive and 1 is passed to set as active | Yes |

| | | | |
|---|---|---|---|
| **region** | Numeric List | Comma-delimited list of region Ids, which provides permission to specific regions for CTM user. getRegions clearConnect API will retrieve the region information present in CTM. | Yes |
| **LOB** | Numeric List | A comma delimited list of LOB ids, which provide permission to specific Line of Business for CTM user. getLOB clearConnect API will retrive Line of Business information | Yes |
| **title** | String | The user's title in CTM | No |
| **phoneNumber** | String | The user's phone number in CTM | No |
| **phoneNumberExt** | String | The user's phone number extension in CTM | No |
| **userRoleID** | Numeric | Sets the User role based on what user role id is passed. getUserRoles clearConnect API will retrive user role information | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **userID** |
| **message** |

## updateUser

**Description:** Updates User data into CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **firstName** | String | The user's first name in CTM. | Yes |
| **lastName** | String | The user's last name in CTM. | Yes |
| **usersUserID** | String | The user's ID in CTM. | Yes |
| **clearConnectAccess** | Boolean | The clearConnectAccess can be set as "0" or "1", 0 is passed to set as inactive and 1 is passed to set as active | Yes |

| | | | |
|---|---|---|---|
| **status** | String | The user's status which can be set either "Active" or "Inactive" in CTM | Yes |
| **email** | String | The user's email address in CTM. | No |
| **title** | String | The user's title in CTM | No |
| **phoneNumber** | String | The user's phone number in CTM | No |
| **phoneNumberExt** | String | The user's phone number extension in CTM | No |
| **userRoleID** | Numeric | Sets the User role based on what user role id is passed. getUserRoles clearConnect API will retrive user role information | No |
| **region** | Numeric List | Comma-delimited list of region Ids, which provides permission to specific regions for CTM user. getRegions clearConnect API will retrieve the region information present in CTM. | No |
| **LOB** | Numeric List | A comma delimited list of LOB ids, which provide permission to specific Line of Business for CTM user. getLOB clearConnect API will retrieve Line of Business information | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **userID** |
| **message** |

## inactivateUser

**Description:** Inactivates the User access into CTM. Requires a root node of <userIDs>. Each argument listed below is then a node of <userIDs>

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **userID** | Numeric | The user's ID in CTM. | Yes |

**Returned Fields:**

| Field Name |
| --- |
| **userID** |

# Section: Credentialing/Licenses

## getCredentialElements

**Description:** Retrieves a data set of license/credential elements. These are the TYPES of credentials defined in CTM. Please note that the term credential is used, but CTM often uses the term license. These terms are used interchangeably here.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **licenseIdIn** | Numeric List | A list of credential element Ids to filter the results by. | No |
| **licenseNameLike** | String | Filter credential elements that have a name containing this value. | No |
| **licenseCategoryIn** | String List | Filter credential elements whose category is in the specified list. | No |

**Returned Fields:**

| Field Name |
| --- |
| **licenseId** |
| **licenseName** |
| **licenseAlias** |
| **categoryId** |
| **categoryName** |
| **licenseSortOrder** |

## getStateLicenses

**Description:** Retrieves a data set of professional state licenses for a specific temp. These licenses are tied to a particular 2-digit state code. For example, if the temp has a professional license in the state of Texas, the state code would be "TX".

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **tempId** | Numeric | The ID of the temp whose state licenses you wish to retrieve. | Yes |

| | | | |
|---|---|---|---|
| **stateCodeIn** | String List | A list of 2-digit state codes, no quotes. | No |

**Returned Fields:**

| Field Name |
|---|
| **licenseRecordId** |
| **stateCode** |
| **licenseNumber** |
| **licenseExpiration** |
| **licenseValidate** |
| **licenseCertId** |
| **claimed** |
| **claimedIDC** |
| **claimedDTC** |
| **claimedIDM** |
| **claimedDTM** |
| **verified** |
| **verifiedIDC** |
| **verifiedIDM** |
| **verifiedDTC** |
| **verifiedDTM** |

## getTempCredentials

**Description:** Retrieves a data set of licenses/credentials for a specific temp. These are the actual credential records defined for the temp. Please note that the term credential is used, but sometimes CTM uses the term license. These terms are used interchangeably here.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp whose credentials you wish to retrieve. | Yes |

**Returned Fields:**

| Field Name |
| --- |
| **licenseRecordId** |
| **licenseId** |
| **licenseName** |
| **licenseAlias** |
| **licenseNumber** |
| **licenseExpiration** |
| **licenseCompleted** |
| **licenseScore** |
| **licenseNote** |
| **licenseValidate** |
| **claimed** |
| **claimedIDC** |
| **claimedDTC** |
| **claimedIDM** |
| **claimedDTM** |
| **verified** |
| **verifiedIDC** |
| **verifiedIDM** |
| **verifiedDTC** |
| **verifiedDTM** |
| **fileIdList** |

## insertStateLicenses

**Description:** Inserts a batch of professional state licenses tied to a temp. Requires a root node of **<stateLicenseRecords>** and one or more **<stateLicenseRecord>** sub-nodes. Each argument listed below is then a node of **<stateLicenseRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |

| | | | |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to tie the state license to. | Yes |
| **stateCode** | String | A two-digit state code for where the professional is held. | Yes |
| **licenseExpiration** | Date/Time | Date/Time the license expires. | No |
| **certId** | Numeric | The ID of a certification | Yes |
| **licenseNumber** | String | The credential/license number. | No |
| **licenseValidate** | Boolean | | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **licenseRecordId** |
| **tempId** |
| **stateCode** |
| **certId** |
| **Message** |

## insertTempCredentials

**Description:** Inserts a batch of temp licenses/credentials tied to a temp. Requires a root node of **<credentialRecords>** and one or more **<credentialRecord>** sub-nodes. Each argument listed below is then a node of **<credentialRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to tie the credential to. | Yes |
| **licenseId** | Numeric | The ID of the credential element. Use the getCredentialElements data service to get retrieve a data set of credential elements. | Yes |
| **licenseNumber** | String | The credential/license number. | No |
| **licenseExpiration** | Date/Time | Date/Time the license expires. | No |

| | | | |
|---|---|---|---|
| **licenseCompleted** | Date/Time | Date/Time the license requirements were completed. | No |
| **licenseScore** | String | General notes. | No |
| **licenseNote** | String | | No |
| **licenseValidate** | Boolean | | No |
| **claimed** | Boolean | | No |
| **verified** | Boolean | | No |
| **licenseMetadata** | String | Expecting JSON metadata related to credential<br><br>Metadata Example:<br><br>{ "name": "John", "age": 31, "city": "New York", "orders": [{ "orderID": 1, "productName": "Test Product Name 1" }, { "orderID": 2, "productName": "Test Product Name 2" } ] } | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **licenseRecordId** |
| **tempId** |
| **licenseId** |
| **message** |

## updateStateLicenses

**Description:** Updates a batch of professional state licenses tied to a temp. Requires a root node of **<stateLicenseRecords>** and one or more **<stateLicenseRecord>** sub-nodes. Each argument listed below is then a node of **<stateLicenseRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp that this state license is tied to. | Yes |
| **stateCode** | String | A two-digit state code for where the professional is held. | Yes |
| **certId** | Numeric | A certification Id | Yes |
| **licenseExpiration** | Date/Time | Date/Time the license expires. | No |
| **licenseNumber** | String | The credential/license number. | No |
| **licenseValidate** | Boolean | | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **tempId** |
| **stateCode** |
| **certId** |
| **message** |

## updateTempCredentials

**Description:** Updates a batch of temp licenses/credentials tied to a temp. Requires a root node of **<credentialRecords>** and one or more **<credentialRecord>** sub-nodes. Each argument listed below is then a node of **<credentialRecord>**.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **tempId** | Numeric | The ID of the temp to tie the credential to. | Yes |
| **licenseId** | Numeric | The ID of the credential element. Use the getCredentialElements data service to get retrieve a data set of credential elements. | Yes |
| **licenseNumber** | String | The credential/license number. | No |
| **licenseExpiration** | Date/Time | Date/Time the license expires. | No |
| **licenseCompleted** | Date/Time | Date/Time the license requirements were completed. | No |

| | | | |
|---|---|---|---|
| **licenseScore** | String | | No |
| **licenseNote** | String | General notes. | No |
| **licenseValidate** | Boolean | | No |
| **claimed** | Boolean | | No |
| **verified** | Boolean | | No |
| **licenseMetadata** | String | Expecting JSON metadata related to credential<br><br>Metadata Example:<br><br>{  "name": "John",  "age": 31,  "city": "New York",  "orders": [{    "orderID": 1,    "productName": "Test Product Name 1"    },  {    "orderID": 2,    "productName": "Test Product Name 2"    } ] } | No |

**Returned Fields:**

| Field Name |
|---|
| **success** |
| **tempId** |
| **licenseId** |
| **message** |

# Section: Documents

## getDocument

**Description:** Retrieves the contents and information of a document from CTM. The content of the document is actually a Base64 encoded representation of the file itself and can be converted back to its original form by decoding it using a Base64 decoding algorithm. See your particular programming language documentation for more information on Base64.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **fileId** | Numeric | The ID of the file/document to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|

| |
|---|
| **fileId** |
| **fullFileName** |
| **clientFilename** |
| **clientFileExt** |
| **contentType** |
| **contentSubType** |
| **dateLastAccessed** |
| **dateUploaded** |
| **entityId** |
| **entityType** |
| **fileSize** |
| **type** |
| **userName** |
| **contents** |

## getDocumentInformation

**Description:** Retrieves the information of a document from CTM. Note that unlike the function "getDocument" this function does not retrieve the contents of a document, but instead gets only information about documents in CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **fileId** | Numeric | The ID of the file/document to retrieve. | No |
| **fileIdIn** | Numeric List | A list of Ids to retrieve document information against. | No |
| **fullFilenameLike** | String | Filter results by full filename. | No |
| **contentSubTypeIn** | String List | A list of MIME sub-types to filter against. | No |
| **contentTypeIn** | String List | A list of MIME types to filter against. | No |

| | | | |
|---|---|---|---|
| **dateLastAccessedGT** | DateTime | Filter results where the date last accessed is greater than the specified date. | No |
| **dateLastAccessedLT** | DateTime | Filter results where the date last accessed is less than the specified date. | No |
| **entityIdIn** | String List | A list of entity Ids to filter the results against. | No |
| **fileSizeGT** | Numeric | Filter results where the size of the document is greater than the specified size in bytes. | No |
| **fileSizeLT** | Numeric | Filter results where the size of the document is less than the specified size in bytes. | No |
| **entityTypeIn** | String List | A list of entity types to filter the results against. | No |

**Returned Fields:**

| **Field Name** |
|---|
| **fileId** |
| **fullFileName** |
| **clientFilename** |
| **clientFileExt** |
| **contentType** |
| **contentSubType** |
| **dateLastAccessed** |
| **dateUploaded** |
| **entityId** |
| **entityType** |
| **fileSize** |
| **type** |
| **userName** |

## getDocumentTypes

**Description:** Retrieves a list of CTM document types defined in your system. This is used by the **DocTypeId** field in the **insertDocument** API call.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **typeIn** | String List | A list of document types to filter the results against. | No |
| **descriptionLike** | String | Filter results where the description of the document type is like the one specified. | No |

**Returned Fields:**

| Field Name |
|---|
| **id** |
| **description** |
| **type** |
| **sortOrder** |
| **active** |

## insertDocument

**Description:** Inserts a document into CTM and attaches it to an entity. Entities a document can attach to include temps, clients, orders, credentials, and state licenses. The document itself, before it can be sent through the web service, must be encoded into a Base64 formatted string. For more information about encoding data using Base64 see your programming language's documentation.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **documentType** | String | One of the following values: Temp, Client, Order, License, Credential | Yes |
| **filename** | String | Name of the document/file to upload. | Yes |
| **contentType** | String | Primary MIME Content-Type | Yes |
| **contentSubType** | String | Content sub-type | Yes |
| **docTypeId** | Numeric | The document type ID. | Yes |
| **fileSize** | Numeric | Size of the file/document in bytes. | Yes |

| | | | |
|---|---|---|---|
| **contents** | String | A Base64 encoded representation of the document. | Yes |
| **tempId** | Numeric | The temp to attach this document to. Only required if the DocumentType is Temp, License, or Credential. | Yes |
| **clientId** | Numeric | The client to attach this document to. Only required if the DocumentType is Client. | Yes |
| **orderId** | Numeric | The order to attach this document to. Only required if the DocumentType is Order. | Yes |
| **stateCode** | String | The 2-digit state code for the professional license to attach this document to. Only required if the DocumentType is License. | Yes |
| **licenseId** | Numeric | The ID of the CTM credential to attach this document to. Only required if DocumentType is Credential. | Yes |
| **fileNote** | String | A note to attach to the file. | No |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **fileId** |
| **Filename** |
| **url (deprecated)**<br><br>**The document can longer be retrieved via HTTP but only through an authenticated ClearConnect request using the fileId return field value. Refer to getDocument.** |
| **Message** |

## shareDocument

**Description:** Shares a document with temps or clients. This function allows you to specify a temp, client, or license document to be shared with other temps or clients.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **fileId** | Numeric | The ID of the document you wish to share. | Yes |
| **tempIds** | Numeric List | A list of temps (their IDs) to share this document with. Also note that this parameter can take the value "all" to indicate the document should be shared with all temps. This parameter is only applicable when sharing client documents. | No |
| **clientIds** | Numeric List | A list of clients (their IDs) to share this document with. Also note that this parameter can take the value "all" to indicate the document should be shared with all clients. This parameter is only applicable when sharing temp documents or license documents. | No |

**Returned Fields:**

| Field Name |
| --- |
| **fileId** |
| **entityType** |
| **Success** |
| **Message** |

## insertTimeDataFile

**Description:** Uploads a time data file for time import. The document itself, before it can be sent through the web service, must be encoded into a Base64 formatted string. For more information about encoding data using Base64 see your programming language's documentation.

**Arguments:**

| Argument | Type | Description | Required |
| --- | --- | --- | --- |
| **clockingsourceName** | String | Timesource name associated to the time data. e.g., CTMTimeslips,TimeImportCSV | Yes |
| **filename** | String | Name of the document/file to upload. | Yes |
| **filecontents** | String | A Base64 encoded representation of the document. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **Filename** |
| **Message** |

# Section: Paychecks (v2 only)

## getBankAccounts

**Description:** Retrieves a record set of bank accounts that are set up in CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **bankAccountIdIn** | String List | A list of bank account Ids to filter by. | No |
| **includeMasterAccount** | Boolean | True to get master bank accounts in this query. | No |

**Returned Fields:**

| Field Name |
|---|
| **bankAccountId** |
| **bankAccountName** |
| **bankAccountDescription** |
| **bankAccountRouting** |
| **bankAccountNumber** |
| **bankAccountType** |
| **nextCheckNumber** |
| **masterBankAccount** |
| **isMasterYN** |
| **directDeposit** |
| **tempId** |
| **bankAddressId** |
| **bankAccountAddressId** |

| |
|---|
| **bankLogoUrl** |
| **bankLogo_Url** |
| **fractionalRoutingNumber** |
| **userDef1** |
| **userDef2** |
| **checkLayoutId** |

## getCheckRegister

**Description:** Retrieves a data set of paycheck register data.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **bankAccountId** | Numeric | The bank account to retrieve check register data from. | Yes |
| **distributionType** | Numeric | The pay distribution type ID to retrieve. | Yes |
| **startDocumentId** | Numeric | Starting check number to filter results by. | No |
| **endDocumentId** | Numeric | Ending check number to filter results by. | No |
| **dateColumn** | String | Date type to filter against. Valid values are: createdDate, modifiedDate, confirmedDate, printedDate, voidedDate. Defaults to printedDate. | No |
| **startDate** | Date | Start date to filter records against. Note that this is driven by the dateColumn setting. | No |
| **endDate** | Date | End date to filter records against. Note that this is driven by the dateColumn setting. | No |
| **disposition** | String | Filter results by check disposition: printed, voided, shredded. | No |
| **includeManual** | Boolean | True/False to include manual checks. Defaults to true. | No |
| **onlyManual** | Boolean | True/False to include ONLY manual checks. | No |
| **includePreprinted** | Boolean | True/False to include checks that have been numbered for a manual, emergency check. Defaults to true. | No |

| | | | |
|---|---|---|---|
| **tempSsnIn** | String List | A list of temp SSNs to filter the results by. | No |
| **tempIdIn** | Numeric List | A list of temp IDs to filter the results by. | No |

**Returned Fields:**

| Field Name |
|---|
| **registerId** |
| **documentId** |
| **bankAccountId** |
| **payrollNumber** |
| **paycheckBatchId** |
| **distributionType** |
| **printed** |
| **voided** |
| **shredded** |
| **prePrinted** |
| **manual** |
| **confirmed** |
| **createdDate** |
| **createdWho** |
| **modifiedDate** |
| **modifiedWho** |
| **printLocation** |
| **confirmedDate** |
| **confirmedWho** |
| **printedDate** |
| **printedWho** |
| **voidedDate** |

| |
|---|
| **voidedWho** |
| **distributionId** |
| **repeatCount** |
| **disbursementAmount** |
| **payrollNumber** |
| **distributionTypeDescription** |
| **paycheckDate** |
| **firstName** |
| **lastName** |
| **bankAccountName** |
| **taxId** |
| **payrollWeekStart** |
| **payrollWeekEnd** |
| **tempSsn** |

## getPaycheck

**Description:** Retrieves a paycheck record.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **payrollNumber** | Numeric | The payroll number of the check to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **payrollNumber** |
| **paycheckDate** |
| **checkNumber** |
| **printedDate** |
| **bankAccountId** |
| **voidedDate** |

| |
|---|
| **voidedWho** |
| **paycheckNote** |
| **isManualCheck** |
| **tempId** |
| **employeeId** |
| **ssn** |
| **firstName** |
| **lastName** |
| **address** |
| **address2** |
| **city** |
| **state** |
| **zip** |
| **fedFilingStatus** |
| **fedExemptions** |
| **printLocation** |
| **disbursementType** |
| **batchNumber** |
| **payPeriodStartDate** |
| **payPeriodEndDate** |
| **payingRegion** |

## getPaycheckDetail

**Description:** Retrieves a paycheck's details.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **payrollNumber** | Numeric | The payroll number of the check to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| lineItem_line_number |
| lineItem_type |
| lineItem_deductionId |
| lineItem_orderId |
| lineItem_clientId |
| lineItem_clientRegionId |
| lineItem_description |
| lineItem_amount |
| lineItem_rate |
| lineItem_qty |
| lineItem_rateDesc |
| timecard_correctionId |
| deductionType |
| deductionName |
| affects_gross_yn |
| taxable |
| fica_exempt |
| fwt_exempt |

## getPaycheckYTD

**Description:** Returns a record set of year-to-date totals for a given worker based on payroll number. The totals returned are the totals for the year that the payroll was run in, and only up **to** the date that payroll was run. For example, if payroll number 1152 was run on August 4th, 2008, and you ran *getPaycheckYTD* in December using payroll number 1152, you would get year-to-date totals for the year of 2008 **UP TO** August 4th.

The records come in two types: gross, and deduction. The first record is always the gross year-to-date total, while subsequent records are year-to-date totals for any deductions that were setup for that temp and were applied to that temp's pay.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **payrollNumber** | Numeric | The payroll number of the year-to-date totals to retrieve. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **payrollNumber** |
| **type** |
| **componentId** |
| **componentName** |
| **ytd** |

## getPayDistributionTypes

**Description:** Retrieves a record set of CTM pay distribution types.

**Arguments:** N/A

**Returned Fields:**

| Field Name |
|---|
| **DistributionTypeId** |
| **DistributionTypeCode** |
| **DistributionTypeDescription** |
| **SortOrder** |
| **IsDefault** |

# Section: Advanced Timecards

## getTimecards

**Description:** Returns a list of timecards and timecard data. Please note that the timecard data for each order is split by pay/bill code and the return values for PayTotal is calculated based on payrate * payunit and BillTotal is calculated based on billrate * billunit.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **orderIdIn** | Numeric List | List of order IDs to filter the results by. | No |
| **clientIdIn** | Numeric List | List of client IDs to filter the results by. | No |
| **shiftStartDateBegin** | DateTime | Shift start date/time begins with | No |
| **shiftStartDateEnd** | DateTime | Shift start date/time ends with | No |
| **shiftEndDateBegin** | DateTime | Shift end date/time begins with | No |
| **shiftEndDateEnd** | DateTime | Shift end date/time ends with | No |
| **status** | String | reconciled, unreconciled, both – Defaults to reconciled | No |
| **dateModifiedBegin** | DateTime | Timecard modified (reconciled) start date/time | No |
| **dateModifiedEnd** | DateTime | Timecard modified (reconciled) end date/time | No |
| **postedBatchIdIn** | Numeric List | List of Posted Batch IDs to filter the results by. | No |
| **postedDateBegin** | DateTime | Timecard posted date date/time | No |
| **postedDateEnd** | DateTime | Timecard posted date date/time | No |
| **isPosted** | Boolean | Is Timecard Posted | No |

**Returned Fields:**

| Field Name |
|---|
| orderId |
| shiftStartTime |
| shiftEndTime |
| actualShiftStartTime |
| actualShiftEndTime |
| lessLunchMin |
| orderType |
| certification |
| specialty |
| invoiceNote |
| shift |
| floor |
| timecard_modifiedDT |
| billCode |
| billRate |
| billUnits |
| payCode |
| payRate |
| payUnits |
| billTotal |
| payTotal |
| billHours_other |
| extraPayNote |
| extraBillNote |
| invoiceNumber |

| |
|---|
| **invoiceDate** |
| **payrollNumber** |
| **payrollDate** |
| **chargePay** |
| **chargeBill** |
| **chargePayAmount** |
| **chargeBillAmount** |
| **clientId** |
| **clientName** |
| **clientRegion** |
| **tempId** |
| **firstName** |
| **lastName** |
| **tempRegion** |
| **status** |

## getTimecardExtras

**Description:** Returns a list of timecard extras as defined in CTM.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **extraIdIn** | Numeric List | List of extra IDs to filter the results by. | No |
| **extraCodeIn** | Numierc List | List of extra codes to filter the results by. | No |
| **extraNameLike** | String | Filter results where the extra's name contains the criteria. | No |
| **extraCodeLike** | String | Filter results where the extra's code contains the criteria. | No |

| | | | |
|---|---|---|---|
| **extraType** | String | Filter results where the type of extra is the specified criteria. Valid values are "pay", or "bill". | No |

**Returned Fields:**

| Field Name |
|---|
| **extraId** |
| **extraName** |
| **extraCode** |
| **extraType** |
| **extraAdjustmentId** |

# Section: Rate Group

## getRateGroupDetails

**Description:** Returns the applicable CTM Rate Group details for a client based on the clientId, effective date, and orderType passed in

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | Numierc | The ID of the client whose rate group you wish to retrieve | Yes |
| **effectiveDate** | Date | Filter results where the effective date falls within the date range defined for the rate group. This filter is considered only if orderType is passed in. | Yes |
| **orderType** | String | Filter results by passed in orderType. If no order type is defined, return Default Rate Group for client if one is defined. If no Default Rate Group found, return error that no Default is defined. | No |

**Returned Fields:**

| Field Name |
|---|
| **clientId** |
| **rateGroupId** |

| |
|---|
| **rateGroupName** |
| **effectiveStartDate** |
| **effectiveEndDate** |
| **holidayDifferentialPay** |
| **holidayDifferentialBill** |
| **callbackDifferentialPay** |
| **callbackDifferentialBill** |
| **chargeDifferentialPay** |
| **chargeDifferentialBill** |
| **isDefault** (This field is only returned for orderType specific rategroup) |

## getRateGroupRates

**Description:** Returns the applicable CTM Rate Group details based on the rateGroupId and other optional arguments passed in.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **rateGroupId** | Numeric | The ID of the rategroup whose rate information you wish to retrieve | Yes |
| **rateType** | String list | Filter results by rateType. Valid values are "pay, bill". If neither is passed in, both types will be returned | No |
| **rateCategory** | String list | Filter results by rateCategory. Valid values are "regular, overtime, doubletime, onCall". If no value is passed in, all categories will be returned | No |
| **rateDay** | String list | Filter results by rateDay. Valid values are "weekend, weekend". If no value is passed in, both weekday and weekend rates will be returned | No |
| **certification** | String list | Filter results by certification. Required, if specialty argument is passed in. | No |

| | | | |
|---|---|---|---|
| **specialty** | String list | Filter results by specialty. Required, if certification argument is passed in.<br><br>If both certification and the specialty argument is passed in then, the response will be filtered to return rates for the requested certification and specialty combination. | No |
| **shiftNumber** | Numeric list | Filter results by shiftnumber. If no value is passed in, all shift numbers will be returned | No |

**Returned Fields:**

| Field Name |
|---|
| **certification** |
| **specialty** |
| **rateType** |
| **rateCategory** |
| **rateDay** |
| **shiftNumber** |
| **Rate** |

# Section: Authentication

## getSessionKey

**Description:** Creates a persistent session in ClearConnect used to authenticate subsequent calls to ClearConnect. A session key has the advantage of additional security and improved performance.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **userName** | String | Username used to authenticate | Yes |
| **password** | String | User's password | Yes |

**Returned Fields:**

| Field Name |
|---|

| |
|---|
| **success** |
| **sessionKey** |
| **message** |

# Section: Travel

## getPayouts

**Description:** Gets a list of paid payouts using a date range, a list of payroll numbers, or a list of temp IDs. *Note, while none of the arguments are required, it should be noted that any call should have one or more of the following: Start Date and End Date (must be used together), Payroll Number(s), or Temp ID(s)

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **startDate** | Date | Start date range for paid payouts | No* |
| **endDate** | Date | End date range for paid payouts | No* |
| **payrollNumberIn** | String | A list of payroll numbers for paid payouts | No* |
| **tempIDIn** | String | A list of TempIDs for paid payouts | No* |

**Returned Fields:**

| Field Name |
|---|
| **payoutID** |
| **payoutName** |
| **payoutAmount** |
| **firstName** |
| **lastName** |
| **tempID** |
| **payrollNumber** |
| **payrollDate** |

## getPayPackage

**Description:** Returns pay package details for a travel assignment, when off contract bill rates and target profit margin is provided. TaxableItems is a xml node with one or more taxableItem sub nodes. NonTaxableItems is a xml node with one or more nontaxableItem sub nodes.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientID** | Numeric | The client ID from CTM | Yes |
| **certification** | String | The certification of the assignment | Yes |
| **specialty** | String | The specialty of the assignment | Yes |
| **startDate** | Date | The start date of the assignment | Yes |
| **endDate** | Date | The end date of the assignment | Yes |
| **regBillRatePerHour** | Numeric | Hourly bill rate for the assignment | Yes |
| **OTBillRatePerHour** | Numeric | Hourly OT bill rate for the assignment | No |
| **regBillHoursPerWeek** | Numeric | Weekly regular bill hours for the assignment | Yes |
| **OTBillHoursPerWeek** | Numeric | Weekly OT bill hours for the assignment | Yes |
| **regPayHoursPerWeek** | Numeric | Weekly regular pay hours for the assignment | Yes |
| **OTPayHoursPerWeek** | Numeric | Weekly OT pay hours for the assignment | Yes |
| **targetMargin** | Numeric | Target profit margin percent for the assignment | Yes |
| **drivingMiles** | Numeric | Driving distance between the work location and the worker's permanent tax home address | Yes |
| **numOfDaysPerWeek** | Numeric | Number of days per week for the assignment | Yes |
| **LTOrderTypeID** | Numeric | Order Type for the assignment | No |
| **shiftNumber** | Numeric | The shift number for the assignment | No |
| **nonTaxableItems** | xmlNode | One or more nontaxable payouts | No |

| | | | |
|---|---|---|---|
| **taxableItems** | xmlNode | One or more taxable payouts | No |

**<taxableItem>**

| | | | |
|---|---|---|---|
| **deductionID** | Numeric | Deduction ID of the taxable payout | Yes |
| **period** | Numeric | Payout frequency | Yes |
| **amount** | Numeric | Payout amount | Yes |

**<nonTaxableItem>**

| | | | |
|---|---|---|---|
| **deductionID** | Numeric | Deduction ID of the taxable payout | Yes |
| **period** | Numeric | Payout frequency | Yes |
| **amount** | Numeric | Payout amount | Yes |

**Returned Fields:**

| Field Name |
|---|
| **hourlyPayRate** |
| **hourlyOTPayRate** |
| **weeklyGrossPay** |
| **totalWeeklyPayPackage** |
| **travelFrom** |
| **travelTo** |
| **weeklyLodging** |
| **weeklyMeals** |
| **onCallPayRate** |
| **callbackPayRate** |
| **message** |
| **stipendEligibilityMinElapsedDays** |

| stipendEligibilityMinMileage |
|---|

## getPayPackageForAssignment

**Description:** Returns pay package details for a travel assignment.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **assignmentId** | Numeric | The long term order ID from CTM | Yes |
| **targetMargin** | Numeric | Target profit margin percent for the assignment. Defaults to 20. | No |
| **drivingMiles** | Numeric | Driving distance between the work location and the worker's permanent tax home address | No |

**Returned Fields:**

| Field Name |
|---|
| **hourlyPayRate** |
| **hourlyOTPayRate** |
| **weeklyGrossPay** |
| **totalWeeklyPayPackage** |
| **travelFrom** |
| **travelTo** |
| **weeklyLodging** |
| **weeklyMeals** |
| **onCallPayRate** |
| **callbackPayRate** |
| **message** |
| **stipendEligibilityMinElapsedDays** |
| **stipendEligibilityMinMileage** |

# Section: Service Lines

## getServiceLines

**Description:** Returns a data set of service lines defined by CTM administrator.

**Returned Fields:**

| Field Name |
|---|
| **ServiceLineId** |
| **ServiceLineName** |

## getClientServiceLineUsers

**Description:** Returns a data set of current CTM users assigned to service lines at a CTM client profile.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | integer | The client id from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **ClientId** |
| **ServiceLineId** |
| **ServiceLineName** |
| **UserId** |

## setClientServiceLineUser

**Description:** Returns a data set of current CTM users assigned to service lines at a CTM client profile.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **clientId** | integer | The client id from CTM | Yes |
| **serviceLineUserId** | Integer | The user id from CTM | Yes |

| | | | |
|---|---|---|---|
| **serviceLineId** | Integer | The service line id from CTM | Yes |

**Returned Values:**

userId {userId} was associated with serviceLineId {serviceLineId} for clientId {clientId}

# Section: User Defined Labels

## getUserDefinedLabels

**Description:** Retrieves the data set of user defined label records based on filter criteria.

**Arguments:**

| Argument | Type | Description | Required |
|---|---|---|---|
| **type** | String | Filter results by type. Valid values are "temp,client,user,region". If no value is passed in, all user defined label details will be returned.<br><br>**Note:** It allows only Temp/Client/User/Region values | No |

**Returned Fields:**

| Field Name |
|---|
| **Type** |
| **Id** |
| **Name** |
| **isSystem** |
| **requiresUniqueValue** |
| **DataType** |
| **AllowedValues** |

## getUserDefinedTempValue

**Description:** Retrieves a data set of user defined temp label and value records based on filter criteria

| Argument | Type | Description | Required |
|---|---|---|---|
| **userDefinedTempID** | Numeric | The ID of the temp whose user defined label and value information you wish to retrieve | Yes |
| **userDefinedLabelName** | String | Filters based on valid temp's user defined label name is passed | Yes |

**Returned Fields:**

| Field Name |
|---|
| **valueID** |
| **labelID** |
| **tempID** |
| **LabelName** |
| **labelValue** |
| **requiresUniqueValue** |
| **isSystem** |

## getUserDefinedClientValue

**Description:** Retrieves the data set of user defined client label and value records based on filter criteria

| Argument | Type | Description | Required |
|---|---|---|---|
| **userDefinedClientID** | Numeric | The ID of the client whose user defined label and value information you wish to retrieve | Yes |

| | | | |
|---|---|---|---|
| **userDefinedLabelName** | String | Filter results by passing the valid user defined client label. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **valueID** |
| **labelID** |
| **ClientID** |
| **LabelName** |
| **labelValue** |
| **requiresUniqueValue** |
| **isSystem** |

## getUserDefinedUserValue

**Description:** Retrieves a data set of user defined user label and value records based on filter criteria

| Argument | Type | Description | Required |
|---|---|---|---|
| **userDefinedUserID** | Numeric | The ID of the user whose user defined label and value information you wish to retrieve | Yes |
| **userDefinedLabelName** | String | Filter results by passing the valid user defined user label. | Yes |

**Returned Fields:**

| Field Name |
|---|
| **valueID** |
| **labelID** |
| **UserID** |

| |
|---|
| **LabelName** |
| **labelValue** |
| **requiresUniqueValue** |
| **isSystem** |

## updateUserDefinedTempValue

**Description:** Updates the user defined temp label value record.

| Argument | Type | Description | Required |
|---|---|---|---|
| **userDefinedTempID** | Numeric | The ID of the temp to update the associated user defined temp label value | Yes |
| **userDefinedLabelName** | String | The User Defined temp label name to update the associated user defined label value | Yes |
| **userDefinedLabelValue** | String | The User Defined temp label value which will be updated | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **tempID** |
| **userDefinedLabel** |
| **Message** |

## updateUserDefinedClientValue

**Description:** Updates the user defined client label value record.

| Argument | Type | Description | Required |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **userDefinedClientID** | Numeric | The ID of the client to update the associated user defined client label value | Yes |
| **userDefinedLabelName** | String | The User Defined client label name to update the associated user defined label value | Yes |
| **userDefinedLabelValue** | String | The User Defined client label value which will be updated | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **ClientID** |
| **userDefinedLabel** |
| **Message** |

## updateUserDefinedUserValue

**Description:** Updates the user defined user label value record.

| Argument | Type | Description | Required |
|---|---|---|---|
| **userDefinedUserID** | Numeric | The ID of the user to update the associated user defined user label value | Yes |
| **userDefinedLabelName** | String | The User Defined user label name to update the associated user defined label value | Yes |
| **userDefinedLabelValue** | String | The User Defined user label value which will be updated | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |

| |
|---|
| **userID** |
| **userDefinedLabel** |
| **Message** |

## getTempsByIntegrationValue

**Description:** Search by the integrationLabelName and integrationLabelValue, and return the related CTM record information (tempID, integrationName and integrationValue) based on those searches.

| Argument | Type | Description | Required |
|---|---|---|---|
| **integrationLabelName** | String | Filters based on valid temp's user defined label name is passed | Yes |
| **integrationLabelValue** | String | Filters based on valid temp's user defined label value is passed | Yes |

**Returned Fields:**

| Field Name |
|---|
| **tempID** |
| **labelName** |
| **labelValue** |

## getClientsByIntegrationValue

**Description:** Search by the integrationLabelName and integrationLabelValue, and return the related CTM record information (clientID, integrationName and integrationValue) based on those searches.

| Argument | Type | Description | Required |
|---|---|---|---|
| **integrationLabelName** | String | Filters based on valid client's user defined label name is passed | Yes |

| | | | |
|---|---|---|---|
| **integrationLabelValue** | String | Filters based on valid client's user defined label value is passed | Yes |

**Returned Fields:**

| Field Name |
|---|
| **ClientID** |
| **labelName** |
| **labelValue** |

## getUsersByIntegrationValue

**Description:** Search by the integrationLabelName and integrationLabelValue, and return the related CTM record information (userID, integrationName and integrationValue)  based on those searches.

| Argument | Type | Description | Required |
|---|---|---|---|
| **integrationLabelName** | String | Filters based on valid user's user defined label name is passed | Yes |
| **integrationLabelValue** | String | Filters based on valid user's user defined label value is passed | Yes |

**Returned Fields:**

| Field Name |
|---|
| **userID** |
| **labelName** |
| **labelValue** |

# Section: Submissions

## getSubmissionsForLTOrder

**Description:** Returns all submissions associated with given LT Order ID.

| Argument | Type | Description | Required |
|---|---|---|---|
| **ltOrderID** | Numeric | The Long-Term Order ID from CTM | Yes |

**Returned Fields:**

| Field Name |
|---|
| **Success** |
| **submissionId** |
| **submissionStatus** |
| **createdDateTime** |
| **createdBy** |
| **modifiedDateTime** |
| **modifiedBy** |
| **Lt_orderID** |
| **tempID** |
| **manualSubmissionYN** |
| **submissionSentDate** |

## getSubmissionActivity

**Description:** Returns all submissions based on Optional Filters.

| Argument | Type | Description | Required |
|---|---|---|---|
| **submissionCreatedStart** | Date | Filter records where submission created date starts with this date. | No |
| **submissionCreatedEnd** | Date | Filter records where submission created date ends with this date. | No |
| **accountManagerID** | Numeric | User ID of the account manager | No |
| **recruiterID** | Numeric | User ID of the recruiter | No |
| **staffingSpecialistID** | Numeric | User ID of the staffing specialist | No |
| **complianceManagerID** | Numeric | User ID of the compliance manager | No |
| **limit** | Numeric | Control how many records to return.<br><br>A maximum of 100 records can be returned with a single request; limit values over 100 will default to 100 | No |
| **offset** | Numeric | Use for paging to retrieve more than 100 records.<br><br>For example,<br>use limit=100 and offset = 100 to get records 101-200 in a set of 300 records | No |

**Returned Fields:**

| Field Name |
|---|
| **submissionId** |
| **submissionStatus** |
| **createdDateTime** |
| **createdBy** |
| **modifiedDateTime** |

| |
|---|
| **modifiedBy** |
| **lt_orderId** |
| **tempId** |
| **manualSubmissionYN** |
| **submissionSentDate** |
| **accountManagerID** |
| **recruiterID** |
| **staffingSpecialistID** |
| **complianceManagerID** |