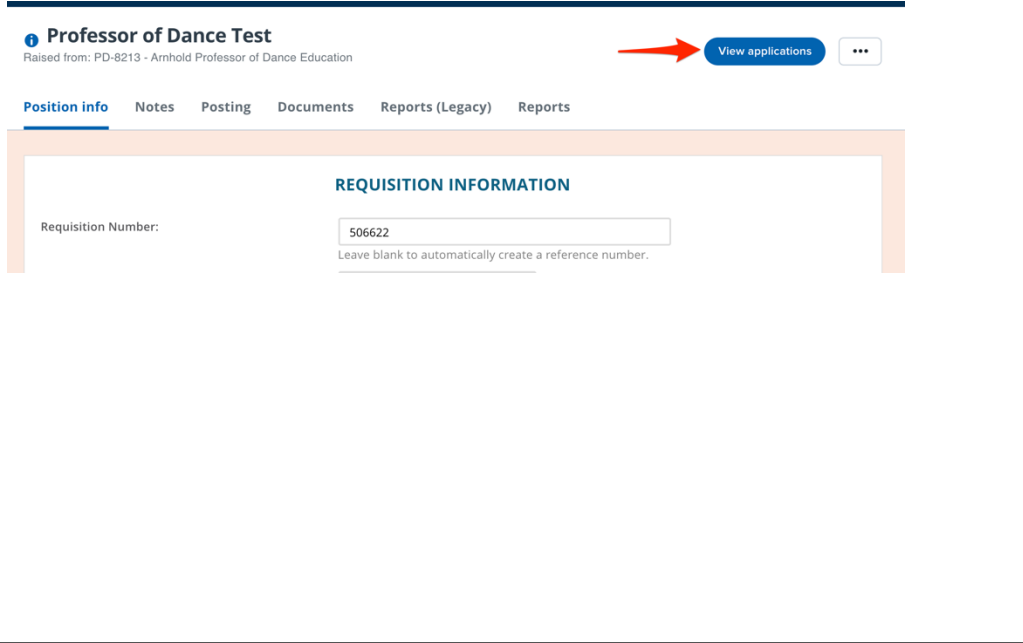
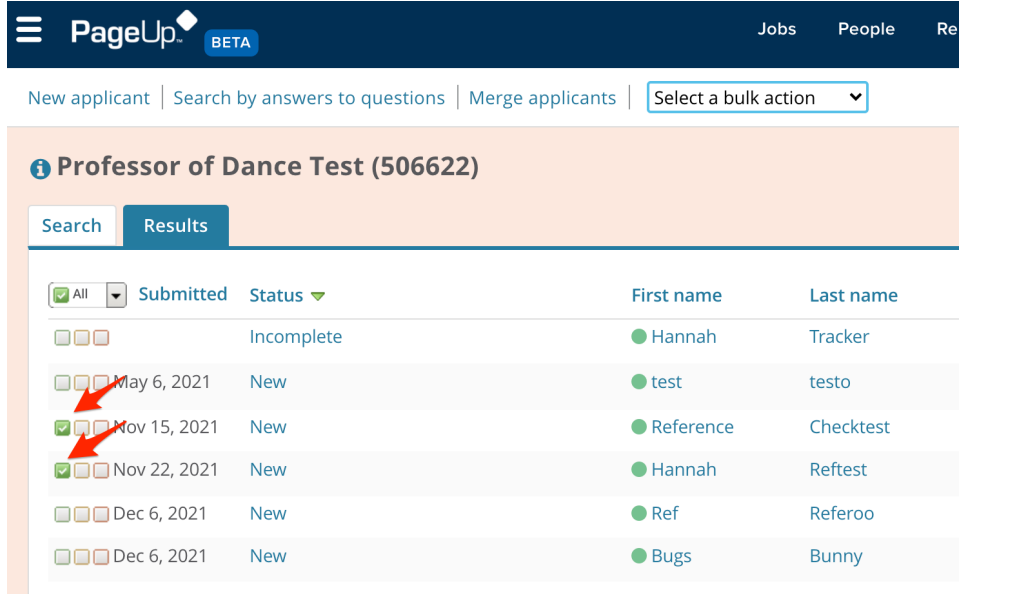


Sending Reference Check Requests

What you need to do	What you will see																																			
<p>STEP 1: Go to applicable requisition and click View applications. You are able to request reference checks in two ways:</p> <ul style="list-style-type: none"> ❖ Send reference check requests for multiple applicants at once (Step 2) ❖ Send reference check requests for one applicant at a time (Step 3) 	 <p>Professor of Dance Test Raised from: PD-8213 - Arnhold Professor of Dance Education</p> <p>View applications ⋮</p> <p>Position info Notes Posting Documents Reports (Legacy) Reports</p> <p>REQUISITION INFORMATION</p> <p>Requisition Number: <input type="text" value="506622"/> Leave blank to automatically create a reference number.</p>																																			
<p>STEP 2: Send reference check requests for multiple applicants.</p> <p>From the applicant listing, click on the checkbox of the applicants you wish to conduct a reference check request for.</p>	 <p>PageUp BETA Jobs People Re</p> <p>New applicant Search by answers to questions Merge applicants Select a bulk action ▼</p> <p>Professor of Dance Test (506622)</p> <p>Search Results</p> <table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/> All ▼</th> <th>Submitted</th> <th>Status ▼</th> <th>First name</th> <th>Last name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>Incomplete</td> <td>Hannah</td> <td>Tracker</td> </tr> <tr> <td><input type="checkbox"/></td> <td>May 6, 2021</td> <td>New</td> <td>test</td> <td>testo</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Nov 15, 2021</td> <td>New</td> <td>Reference</td> <td>Checktest</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Nov 22, 2021</td> <td>New</td> <td>Hannah</td> <td>Reftest</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Dec 6, 2021</td> <td>New</td> <td>Ref</td> <td>Referoo</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Dec 6, 2021</td> <td>New</td> <td>Bugs</td> <td>Bunny</td> </tr> </tbody> </table>	<input checked="" type="checkbox"/> All ▼	Submitted	Status ▼	First name	Last name	<input type="checkbox"/>		Incomplete	Hannah	Tracker	<input type="checkbox"/>	May 6, 2021	New	test	testo	<input checked="" type="checkbox"/>	Nov 15, 2021	New	Reference	Checktest	<input checked="" type="checkbox"/>	Nov 22, 2021	New	Hannah	Reftest	<input type="checkbox"/>	Dec 6, 2021	New	Ref	Referoo	<input type="checkbox"/>	Dec 6, 2021	New	Bugs	Bunny
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STEP 2.1:

Go to **Select a bulk action** drop down menu in the top menu.

From the listing, scroll down to **Bulk reference Check**.

Search by answers to questions | **✓ Select a bulk action**

- Bulk apply
- Bulk categorize
- Bulk assign
- Bulk communicate
- Bulk compile and send
- Bulk document merge
- Bulk export
- Bulk invite to apply
- Bulk move
- Bulk move and send
- Bulk reference check**
- Bulk send
- Bulk task/reminder

Professor of Dance T

Search Results

All Submitted Status Pre

<input type="checkbox"/>	<input type="checkbox"/>	May 6, 2021	New	test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Nov 15, 2021	New	
<input type="checkbox"/>	<input type="checkbox"/>	Nov 22, 2021	New	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Dec 6, 2021	New	

STEP 2.2:

A **Request reference check** pop up box will appear.

Input the applicable reference check invitation expiry date.
**The listed reference will have until this date to complete the reference check request.

Click Next.

Request reference check

Please fill in all mandatory fields marked with an asterisk (*).

Bulk action status: 2 Applicants Complete

You have requested to perform reference checks for 2 applicants.

Please select the expiry date for the reference check invitation:

Invitation expiry date:*

Next Cancel

STEP 2.3:

You will be taken to the communication template that will be sent to the referees.

The template will be auto populated with:

- the referee’s name
- the applicant’s name
- link to the website to complete the reference check form
- expiration date
- your name

You are able to change the From field, Subject line and add any additional instructions to the body of the email.

Click **Finish**.

Emails are sent to all references listed by each applicant.

Request reference check

Bulk action status: 1 Applicant Complete

You are able to request reference checks from 3 references, on behalf of 1 applicants.

[Preview the references who will be invited to provide reference checks](#)

Emails will only be sent to references with a valid email address.

You can communicate using the methods below:

E-mail: References: Yes No

From:*

Subject:*

Message:*

B *I* U

Dear {REFEREEFIRSTNAME},

Recently {FIRSTNAME} {LASTNAME} applied for a position and has listed you as one of their references. We require you {REFERENCECHECKURL}

Kindly complete this online reference check by 16 December 2021. If you're unable to participate or have other question:

Thank you,
Johanna Masbad
Sr. HRIS Analyst

STEP 3: Send reference check requests for an individual applicant.

From the manage applicants page, click the name of the applicant you are requesting the reference check for.

Professor of Dance Test (506622)

Search		Results		
<input checked="" type="checkbox"/> All	Submitted	Status	First name	Last name
<input type="checkbox"/>		Incomplete	Hannah	Tracker
<input type="checkbox"/>	May 6, 2021	New	test	testo
<input checked="" type="checkbox"/>	Nov 15, 2021	New	Reference	Checktest
<input type="checkbox"/>	Nov 22, 2021	New	Hannah	Reftest

STEP 3.1:

The applicant card will appear. Go to your requisition. (If the applicant has applied to multiple jobs, all of them will be displayed here.)

On the right side of the row, click the "..."

Ref Referee View profile Add flags Actions

Address: New Jersey, United States | Phone: -

E-mail: reference@test.com | Number: 43231

Original source: [Applicant applied via Email](#) | Linked Employee: [Modify](#)

e-Zines comms hold: Yes

Applications | History | Scheduled emails | CRM | Resume

506622 - Professor of Dance Test ⋮

Date submitted	Applied via	Status changed Dec 6, 2021	Offer
Dec 6, 2021	Applicant applied via Email	New	No offer
Resume	Form	Add flags	
View	View		

STEP 3.2:

You will see a list of action items. Scroll to the **view references** link and click it.

Communicate

- Compile and send
- New booking to an existing event
- New booking to a new event
- New task/reminder
- New form
- Send application
- Send application and change status
- [View references](#)

STEP 3.3:

You will be taken to the Manage references page.

Click **Send** for each referee you would like to send a reference check request to.

Manage references New | [Send invitations](#)

Job: Professor of Dance Test (506622)

Status: Active Clear Search

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Reference position	Phone	E-mail	Length of Tenure	
Daffy	Duck	-	-	-	-	-	-	-	daffy@duck.com	-	Edit Send Archive
Tweety	Bird	-	-	-	-	-	-	-	tweety@bird.com	-	Edit Send Archive
Elmer	Fudd	-	-	-	-	-	-	-	elmer@fudd.com	-	Edit Send Archive

STEP 3.4:

You will be taken to the communication template that will be sent to the referee.

In the Expiry Days field, input the # of days the reference check request will be available for them to complete.

You are also able to change the From field, subject line and add any additional instructions to the body of the email.

Click **Finish**.

Send

Expiry Days:*

E-mail from:*

E-mail subject:*

E-mail body:*

Merge fields

B *I* U

Dear {REFEREEFIRSTNAME},

Recently {FIRSTNAME} {LASTNAME} applied for a position and has listed you as one of their references. We require your assistance in completing a reference on their behalf. To begin the reference check, please click the link below:

{REFERENCECHECKURL}

Kindly complete this online reference check by {REFERENCECHECKEXPIRY}. If you're unable to participate or have other questions, please email me at: {USEREMAIL}.

Thank you,

This will also be auto populated with:

- the referee's name
- the applicant's name
- link to the website to complete the reference check form
- your name

STEP 4:

Review status of references

A listing of all Active reference check requests are shown by default.

- Complete = reference check was completed;
- Invitation expired = reference check was not completed.

You should be able to view answers, resend invitations, edit, or archive a reference check request.

Manage references

New | Send invitations

Job: Professor of Dance Test (506622)

Status:

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Reference position	Phone	E-mail	Length of Tenure
Hannah	Masbad	Professional	Completed	Nov 20, 2021		TC				
Barack	Obama	Professional	Invitation Expired	Nov 20, 2021		US Govt				