How to SkillSurvey Reference™

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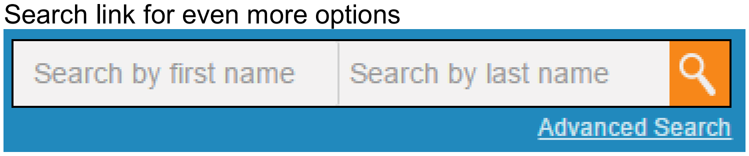
How to Navigate SkillSurvey Reference

Global Navigation

The global navigation header provides users with quick access to key functionality from all pages within SkillSurvey Reference. Scroll your mouse to view any additional menu items for each section.

- **Home** – Personalized recruiter dashboard
- **Candidates** – Opens a menu of options to manage Candidates
    1. **Manage Candidates** – The area to search for your own Candidates or all Candidates with multiple search features and filters
    2. **Create Candidate** – Launch the screens to enter a Candidate, select a survey and send an email to the Candidate to enter References.
    3. **File Candidates** – Update the filing status for multiple Candidates all at once or upload an Excel spreadsheet.
- **Help** – Access the following:
    1. Pre-Hire 360 Survey Library
    2. Customer Support
    3. FAQs

- Create a Candidate by clicking the **Create Candidate** icon 
- Search for Candidates within your organization by First and Last Names or use the Advanced Search link for even more options



System Icons

Click the **Create Candidate** icon to enter a new candidate.

SkillSurvey Reference™ is our automated reference assessment program.

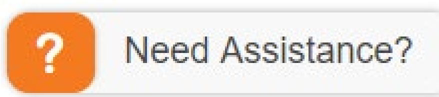
Click the **Compare Candidates** icon in the **My Open Positions** widget to compare Candidate for position.

SkillSurvey Credential OnDemand® is our automated reference assessment and privileging program for healthcare organizations.

Click on the **Information Bubbles** to learn more about that section.

SkillSurvey Source is our integrated passive candidate sourcing and management system.

Click this icon to **Edit** relevant information.



Click our **SkillSurvey Assistant** to learn more about SkillSurvey Reference.

Click this icon to **Resend Email** to Candidates or References.

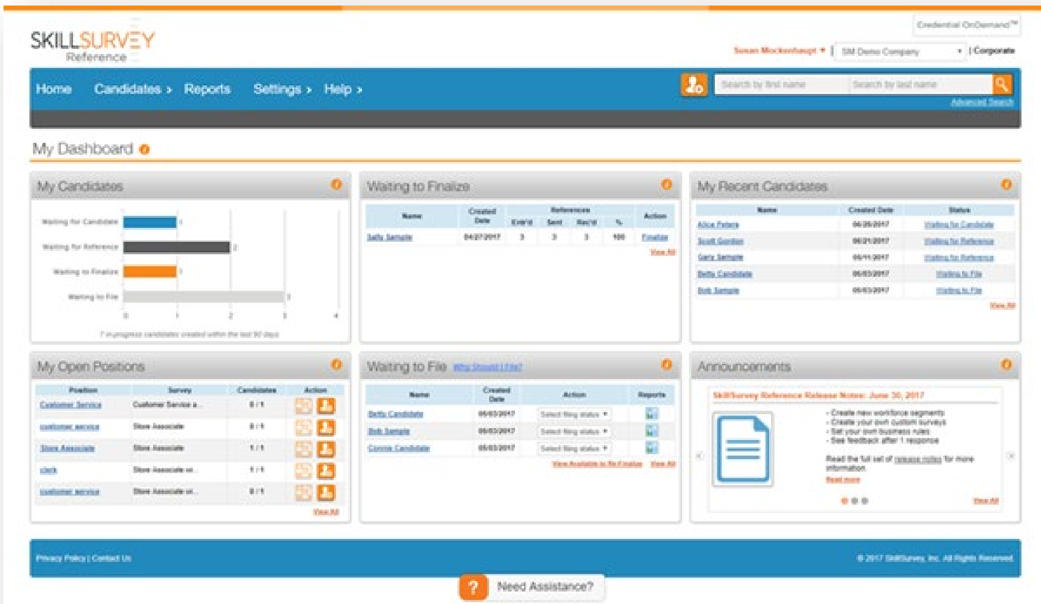
Click this icon to see instructions on how Candidate or Reference can receive another text.

Click this icon to view a report for a finalized Candidate.

How to Read the Home Page Dashboard

How to Read the Home Page Dashboard

The home page is a dashboard personalized for each Recruiter based on the Candidates they have entered into the system.



— **My Candidates** Widget

This widget features 4 candidate statuses that represent the status flow of the Candidate through SkillSurvey Reference and the number of Candidates within each status. The numbers shown are based on Candidates that are currently in progress and were created within the past 90 days.

1. **Waiting for Candidate** status – this means the Candidate has been entered into the system, a survey has been selected and the email has been sent to the Candidate.
2. **Waiting for Reference** status – this means the Candidate has entered their References and sent the email request to the References.
3. **Waiting to Finalize** status – this means the Candidate has received the minimum number of Reference responses needed to finalize the Candidate and run the SkillSurvey Reference Feedback Report.
4. **Waiting to File** status – this means the Candidate has been finalized and is now ready to file as hired, not hired, etc.

— **Waiting to Finalize** Widget

This widget features the 5 most recent candidates that are now available to finalize along with the created date, number of references entered, sent and received, percentage received to date and link to finalize the candidate.

— **My Recent Candidates** Widget

This widget features the candidates that have most recently been entered or changed status, along with the candidate's created date and status.

— **My Open Positions** Widget

This widget features a roll up of all your open positions for candidates that you have created based on position or job title entered and survey selected. The Candidates column represents the number of finalized candidates/total candidates that were created using the position and survey combination. Click the **Create Candidate** icon to create a candidate, automatically populate the position or job title and automatically select the survey. This not only saves you a few clicks, but ensures that you are evaluating candidates for an open position the same way.

— **Waiting to File** Widget

This widget features the 5 most recent candidates that are now available to file and displays the created date for each. Quickly file the candidate by selecting a file status from the dropdown box in the action column or run a SkillSurvey Reference Feedback Report by clicking the report icon.

 A blue triangle icon indicates that a candidate has had sufficient additional references respond after a finalization to meet the requirements and allow re-finalization so that the additional feedback can be incorporated into the SkillSurvey Reference Feedback Report. Click the blue triangle icon to open the Candidate Details page, re-finalize the candidate and run the SkillSurvey Reference Feedback Report. Click the **View Available to Re-Finalize** link to view all your candidates that are available to re-finalize.

— **Announcements** Widget

This widget features SkillSurvey announcements about enhancements to SkillSurvey Reference, best practices and more. Company administrators also have the ability to post internal announcements for their recruiters. See **How to Manage Settings** for more information.

How to Create a Candidate

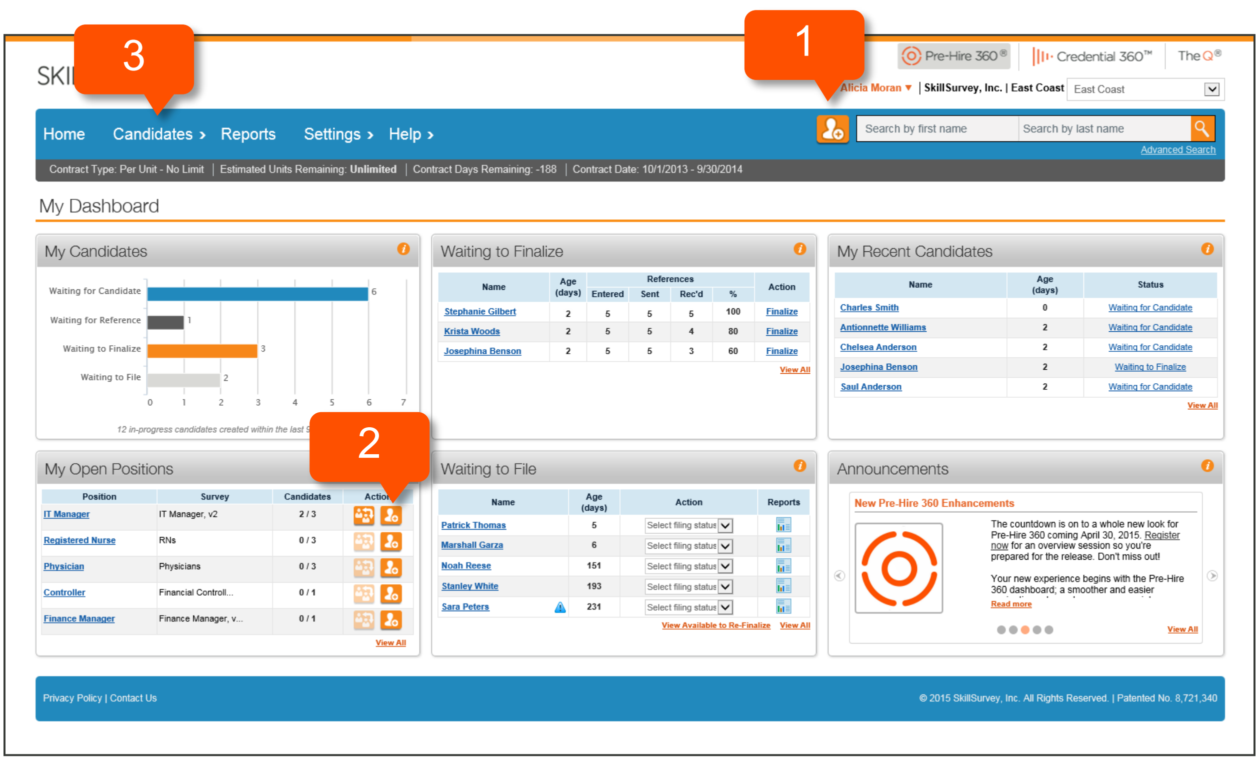
In this section, users will have the ability to:

- Create a new candidate
- Select a survey based on the best option for a job title
- Select a survey based on a previously used survey for a job title
- Initiate the reference assessment process

Step 1: Access the Create a Candidate Page

There are multiple ways to create a candidate in SkillSurvey Reference™ and any of these will take you to the next step:

- Click the **Create Candidate** icon at the top right of the page
- Click the **Create Candidate** icon in the **My Open Positions** section on the home page dashboard; this will automatically pull in the same job title and pre-select the same survey used for a previous candidate
- Click the **Create Candidate** option from the Candidates menu



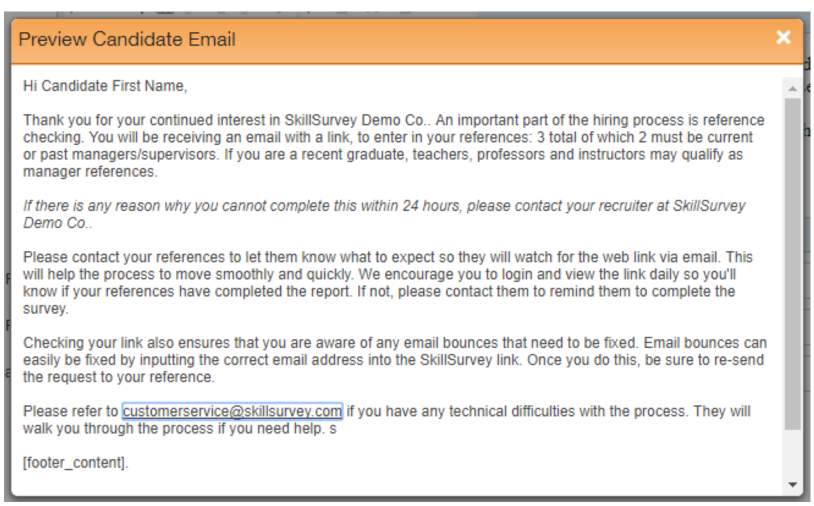
Step 2: Provide Candidate Information

Fill in the following candidate information in the Candidate and Position Information section, fields marked with a red asterisk are required:

- **First Name**
- **Last Name**
- **Select Contact Method:** Email
- **Email Address –**Click **Preview** to see a sample email.
- **Position Applying for**
  This is the job title of the position to which the candidate is applying. Surveys that best match the job title will be dynamically generated in the **Available Surveys** section on this page.
- **Assign Candidate to**
  The default name shown in the dropdown list is the recruiter that is logged into the system. A user may select another name from the list and that assignee will receive all email communications regarding the status of the candidate.
- **Candidate Type**
- The default is “Not current employee of State of Wisconsin”, a user may change the selection to “Current employee of State of Wisconsin” if applicable.
- **Cert Number**
  Enter the Cert Number that is associated with the applicant. An LTE where there is no cert number type “LTE”

The **Hiring Company Name** is automatically featured in the Candidate Email, Candidate Best Practice Email and Candidate Consent Form.

The **Hiring Company Name** will be automatically featured as the “From” name on emails and in the subject line. The contact verbiage will be shown as “…, please contact your recruiter or HR representative” when a Hiring Company Name is selected. The Candidate Best Practice Email will need to be updated as noted below to pull in the company name.


Preview Candidate Email

Hi Candidate First Name,

Thank you for your continued interest in SkillSurvey Demo Co.. An important part of the hiring process is reference checking. You will be receiving an email with a link, to enter in your references: 3 total of which 2 must be current or past managers/supervisors. If you are a recent graduate, teachers, professors and instructors may qualify as manager references.

If there is any reason why you cannot complete this within 24 hours, please contact your recruiter at SkillSurvey Demo Co..

Please contact your references to let them know what to expect so they will watch for the web link via email. This will help the process to move smoothly and quickly. We encourage you to login and view the link daily so you'll know if your references have completed the report. If not, please contact them to remind them to complete the survey.

Checking your link also ensures that you are aware of any email bounces that need to be fixed. Email bounces can easily be fixed by inputting the correct email address into the SkillSurvey link. Once you do this, be sure to re-send the request to your reference.

Please refer to customerservice@skillsurvey.com if you have any technical difficulties with the process. They will walk you through the process if you need help. s

[footer_content].

Step 3: Survey Selector

Now it's time to select a survey!

SkillSurvey's ever growing library of behavior-based, job-specific surveys is designed by on-staff Industrial/Organizational Psychologists to assess the competencies critical to success in each role. The Survey Selector feature was developed for all clients to make the process easier than ever to find the right survey for each job.

Survey Selector Features

- Ability to easily search our database of over 400 surveys by job title.
  We have thousands of job titles on file that have each been matched to an appropriate survey.
- Ability to view the surveys best designed to assess performance for a specific job along with an indication of how close of a match each survey is to the job title.
- Ability to access the surveys most recently used by your company for the same job title to promote consistency in evaluating candidates and take advantage of the Candidate Comparison Report.
- Ability to quickly and easily save surveys as a personal "Favorite".
- Take advantage of new surveys that are being added all the time.

Key Things to Note:

- Any custom surveys built for your organization will be shown and searchable.
- If you do not see a survey that meets your specific job requirements, please contact your account manager to discuss your needs.
- If you have any questions, please contact our customer support center at customerservice@skillsurvey.com or 1-855-842-5251.

There are two distinct survey libraries available for you to choose a survey

- **Pre-Hire 360®** job-specific survey library is embedded into the product and is available to all SkillSurvey Reference™ customers.
- **Customer Configured** survey library is created by your administrator after your organization opts to enable workforce segment and customer configured survey functionality.

Survey Selector: Pre-Hire 360 Surveys

There are two sections of available surveys:

- **Recommended Surveys** - Recommended surveys is a list of potential surveys that best match the position name entered. Surveys are presented with the best matches first as indicated by the number of stars in the Match column. Over 5,000 position names have been scientifically matched to our ever-growing database of surveys.
- **Previously Used Surveys** - Previously used surveys are those surveys selected in the past for the position name entered. The surveys shown in this section are based on an exact match of

the job title entered. This is especially helpful when trying to ensure the same survey is selected for candidates who are applying for the same position.

To select a survey in either section, click the radio button in the Select column beside the survey, and then click the **Send Candidate Email** button.

Survey Selector Column Features for Pre-Hire 360 Surveys

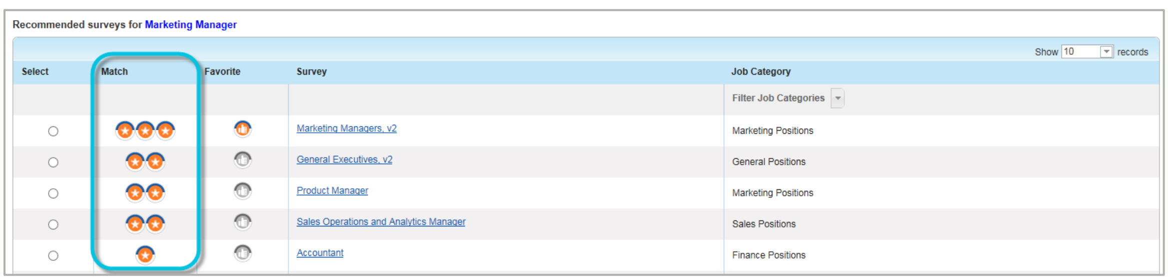
All columns are sortable by clicking on the column name.

Match Column:

The numbers of stars in this column indicate how well a survey matches the position name entered. The maximum number of stars is 3. Our system determines a match by comparing the job title entered with the survey name and associated job titles. The best matches are listed first.

3 = Best Match
2 = Good Match
1 = Okay Match

A survey that shows 3 stars in the Match column has a direct job title match to that survey. A 2-star match means that portions of the job title are matched to that survey. A 1-star match means one word of the job title is matched to that survey.

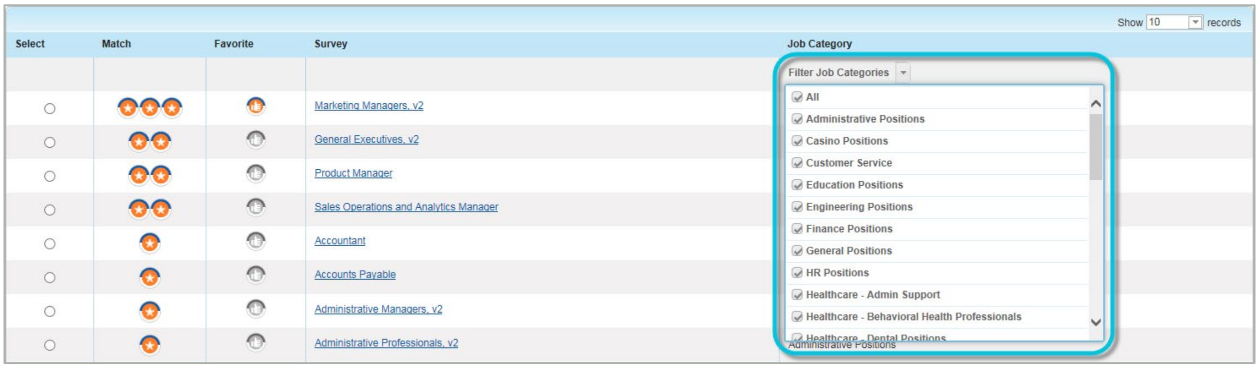


Favorite Column:

Each user can save a survey as a Favorite. To save a favorite, click the SkillSurvey “thumbs up” icon. Each time a list of surveys is presented, users can sort on this column to find their favorites.

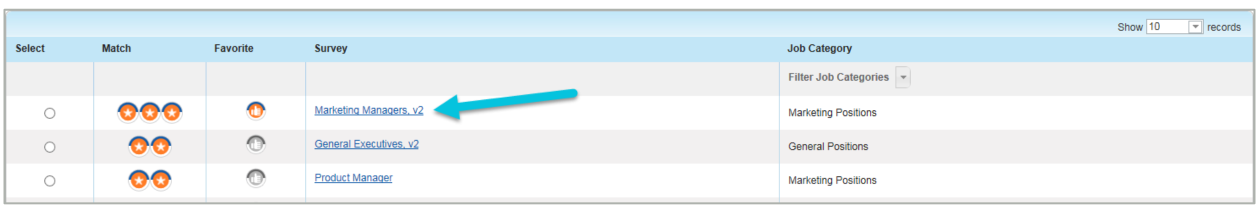
Job Category Column:

Each survey shown is related to a Job Category. The job categories can be sorted by clicking on the column header and filtered further by clicking the dropdown list. The dropdown list features all potential job categories provided by SkillSurvey. If created, custom job categories and surveys will also be shown.



Survey Details

To view the details about a survey, click the survey name link.



A new window will pop up and feature the following:

- Survey name and description.
- Relevant Job Titles that were matched to that survey. Job title names are highlighted in yellow.
- Available languages for the survey.
- Links to Samples including:
  - Survey
  - Sample Feedback Report
  - Candidate Snapshot Report
  - Hiring Manager Summary
  - Candidate Email
  - Reference Email

Marketing Managers, v2

Description
Marketing Managers plan, direct, and oversee the marketing functions of a department or company. They provide training and instruction to staff members as well as monitor performance and provide feedback and development opportunities when needed.

Relevant Job Titles

- Area Marketing Manager
- Associate Director Marketing
- Director of Marketing
- Field Sales Manager
- Group Marketing Manager
- Internal Communications Manager
- Manager Corporate Relations & Cause Marketing
- Manager Market Development
- Marketing
- Marketing Analytics Manager
- Marketing Director
- Marketing Manager
- Marketing Services Manager
- Online Analytics Manager
- Online Marketing Manager
- Product Manager
- Product Marketing Manager
- Senior Case Manager
- Senior Director of Marketing
- Senior Marketing Manager
- Senior Product Manager

Languages

- English
- Deutsch
- Español
- Français
- Português
- 簡体中文

Samples

- Survey
- Feedback Report
- Candidate Snapshot Report
- Hiring Manager Summary
- Candidate Email
- Reference Email

Survey Selector: Customer Configured Surveys
To view the details about a survey, click the survey name link.

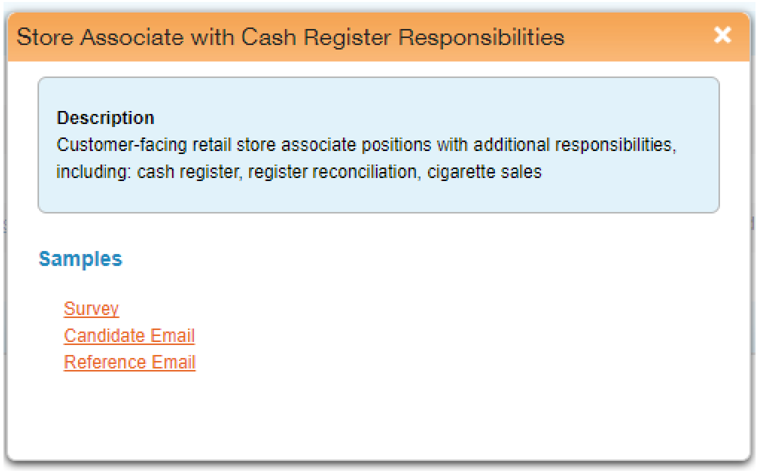
Show 10 records

Select	Survey	Description
○	New Grad	New graduates
○	Home Health Aide	Home Health Aide
○	Customer Service	Customer Service Associates
○	Store Associate with Cash Register Responsibilities	Customer-facing retail store associate positions with additional responsibilities, including: cash register, registe...
○	Store Associate	Customer-facing retail store associate positions

1 - 5 of 5 records   ‹ Prev 1 Next ›

A new window will pop up which will feature the survey name and description as well as links to samples, including:

- Survey
- Candidate Email
- Reference Email


Store Associate with Cash Register Responsibilities
Description
Customer-facing retail store associate positions with additional responsibilities, including: cash register, register reconciliation, cigarette sales
Samples
Survey
Candidate Email
Reference Email

How to Search for a Candidate

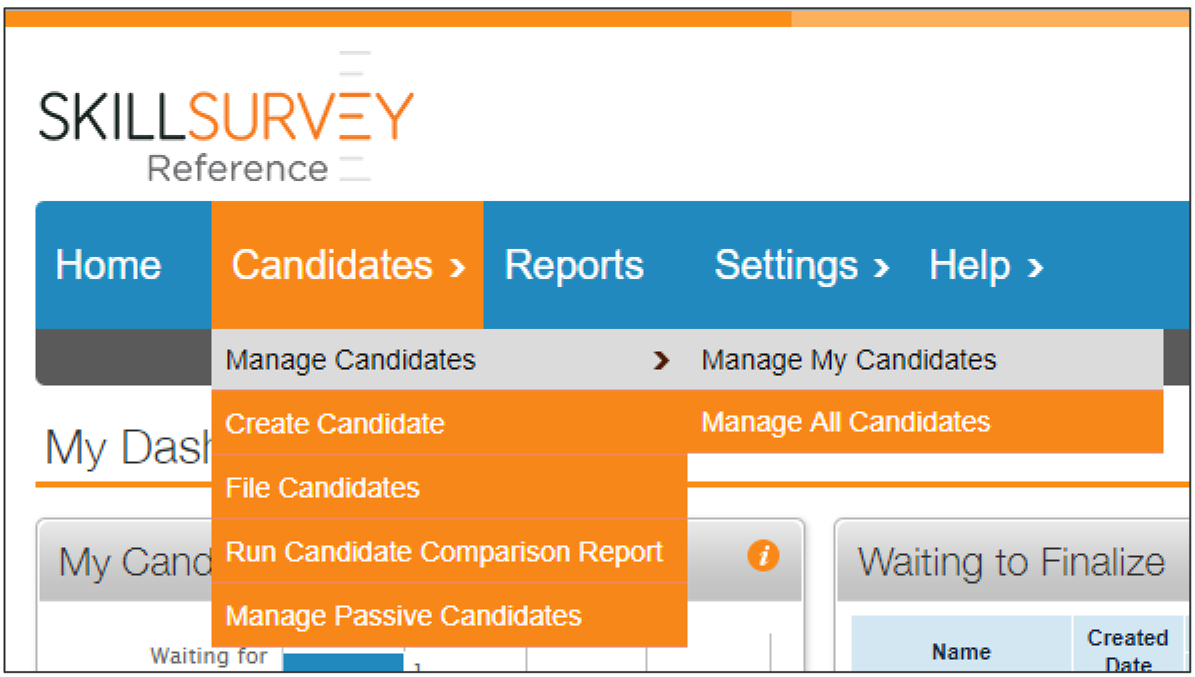
In this section, users will have the ability to:

- Search for their own candidates in the **My Candidates** tab
- Search for all candidates in the **All Candidates** tab
- Conduct a global **search** from the top navigation bar

How to Search for My Candidates

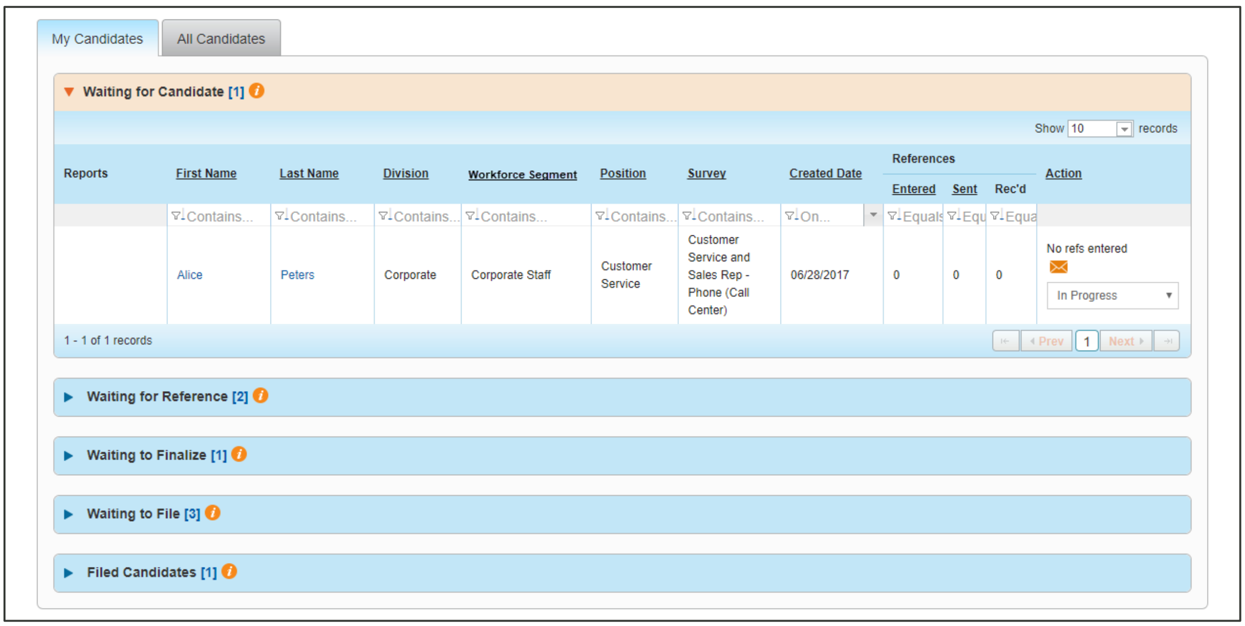
To search for your own candidates:

- Select the **Candidates Menu** from the top navigation bar
- Select **Manage Candidates**, then **Manage My Candidates**



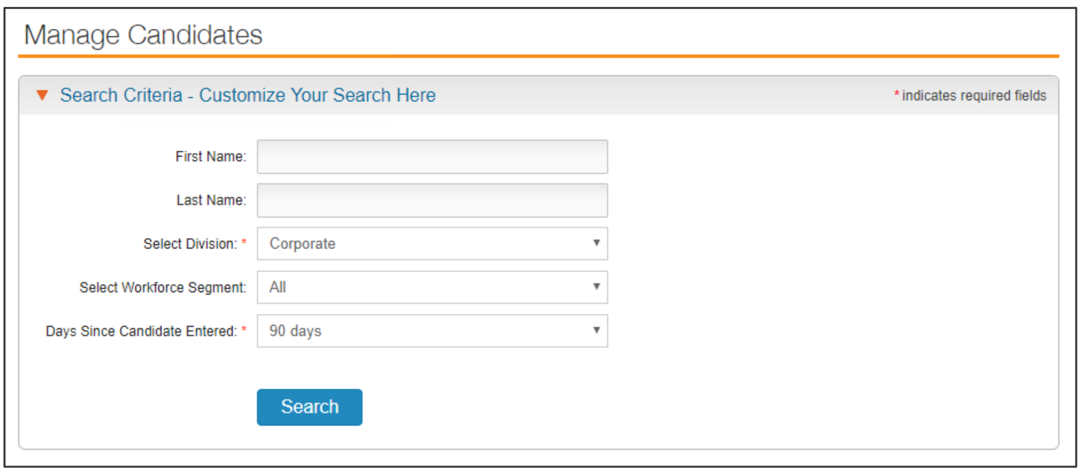
Key Things to Note:

- Resulting candidates list will be shown in the **My Candidates** tab
- Candidate list is based on your current division
- Candidate list includes candidates entered within the last 90 days
- Workforce segment is shown if that functionality is enabled for your organization
- Candidates are categorized based on their status
  (for Candidate status definitions see page 7)
    - **Waiting for Candidate**
    - **Waiting for Reference**
    - **Waiting to Finalize**
    - **Waiting to File**
    - **Filed Candidates**



To customize your search further, use the **Search Criteria** at the top of the page and enter:

- First Name
- Last Name
- Select Division
  - Required field
  - Select All to include candidates in all divisions where you have permissions
- Select Workforce Segment
  - Select All to include candidates in all workforce segments associated with divisions in which you have permissions
- **Days Since Candidate Entered**
  - Required field
  - Options Include: 7, 30, 90, 365 days, All, Custom date range
  - Defaults to 90 days

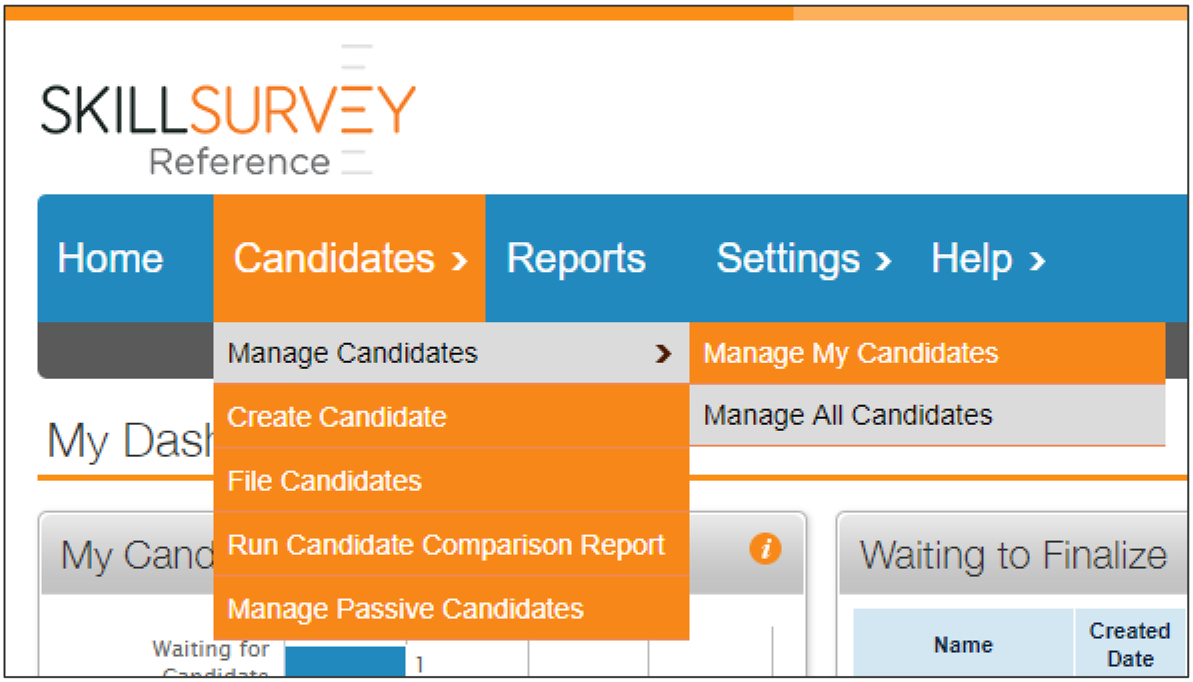


- Select **Search** to view results

How to Search for All Candidates

To search for All candidates:

- Select the **Candidates** menu from the top navigation bar,
- Select **Manage Candidates,** then **Manage All Candidates**



Key Things to Note:

- You can view candidate information only in divisions which your permissions allow
- The resulting list will be presented in the **All Candidates** tab

Use the **Search Criteria** at the top of the page to customize your list:

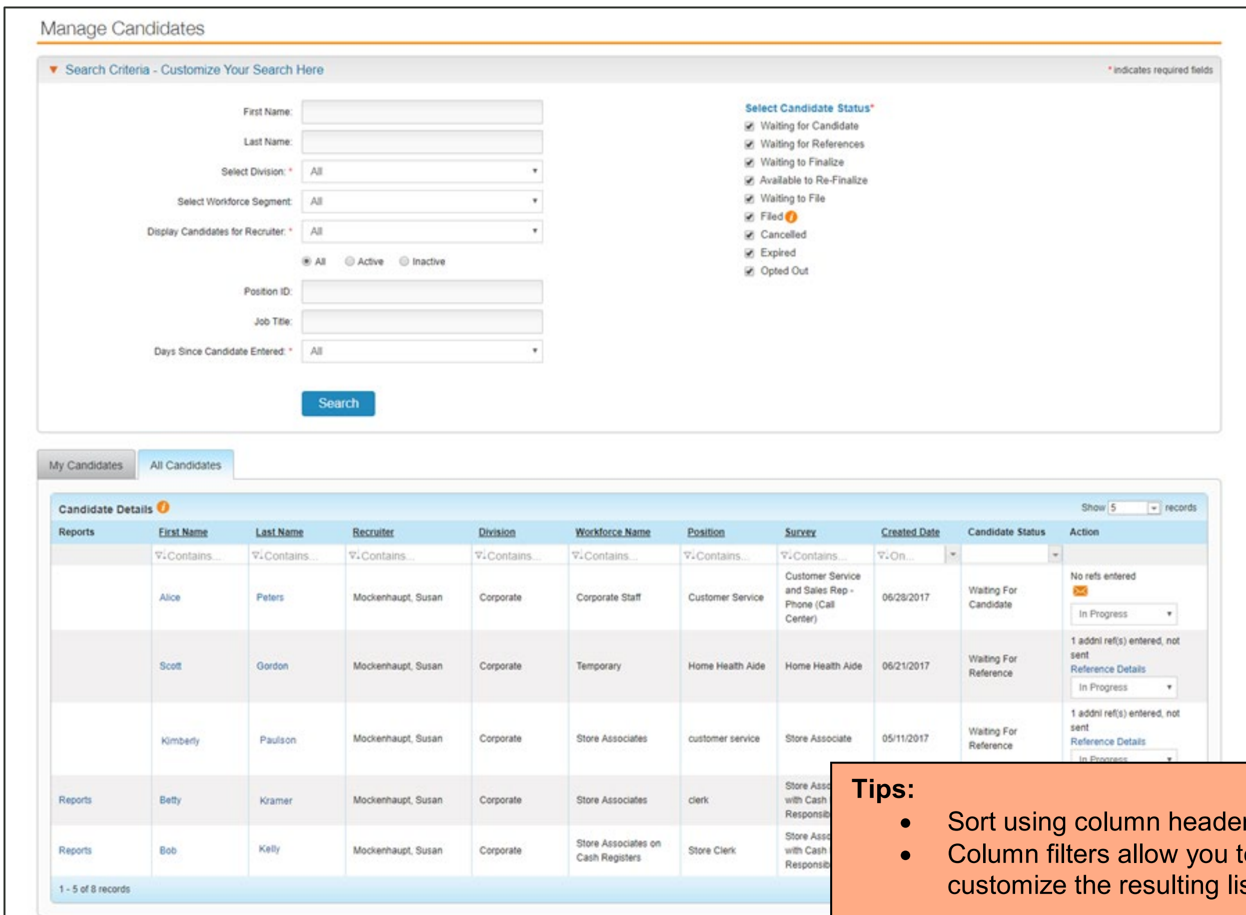
- **First Name**
- **Last Name**
- **Display Candidates for Recruiter**
  - Select a recruiter to filter by a specific recruiter's candidates
  - Recruiters will be available if they are associated with divisions to which you have permissions
- **All**, **Active**, or **Inactive** status radio buttons
- **Cert Number**
- **Job Title**
- **Days Since Candidate Entered**

– Required field
– Options Include: 7, 30, 90, 365 days, All, Custom date range

— **Select Candidate Status**

– Allows you to filter the candidates list
– Options include:

- Waiting for Candidate
- Waiting for References
- Waiting to Finalize
- Available to Re-Finalize
- Waiting to File
- Filed
- Cancelled
- Expired
- Opted Out



Tips:

- Sort using column headers
- Column filters allow you to customize the resulting list

Search results are populated as a straight list of candidates, not broken down into categories by status as they are in the **My Candidates** tab.

Global Search

Key Things to Note:

- Global Search displays results in the **All Candidates** tab in **Manage Candidates**
- Results include candidates in the divisions to which you have access

To search All Candidates, or for your own candidate:

- Enter the candidate's name and click the Search button 
- The **Advanced Search** link is a shortcut to open the All Candidates tab on the Manage Candidates page, where you have all the search options described above.

How to Override Reference Requirements

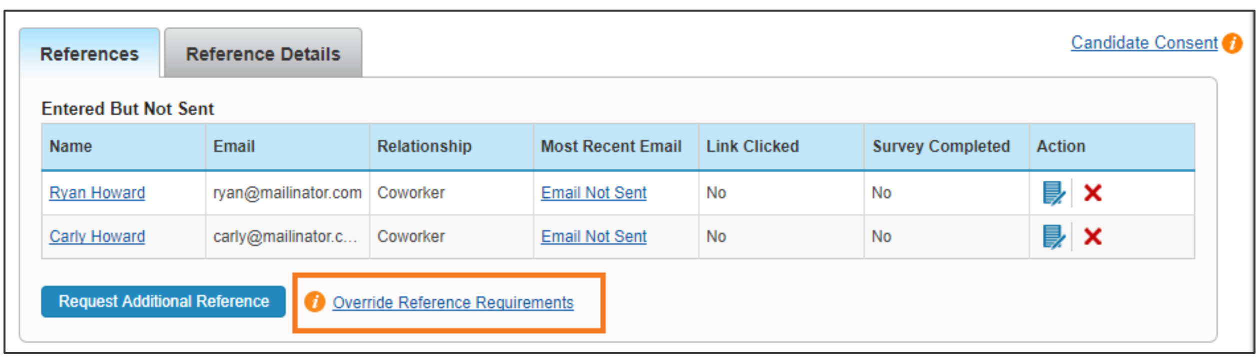
In this section, learn to override the business rule that dictates the total number of References required from a Candidate before sending the reference request emails.

Key Things to Note:

- The Candidate must enter at least two References before this feature is available
- Overriding the business rules for minimum reference requirements should be used only in extenuating circumstances

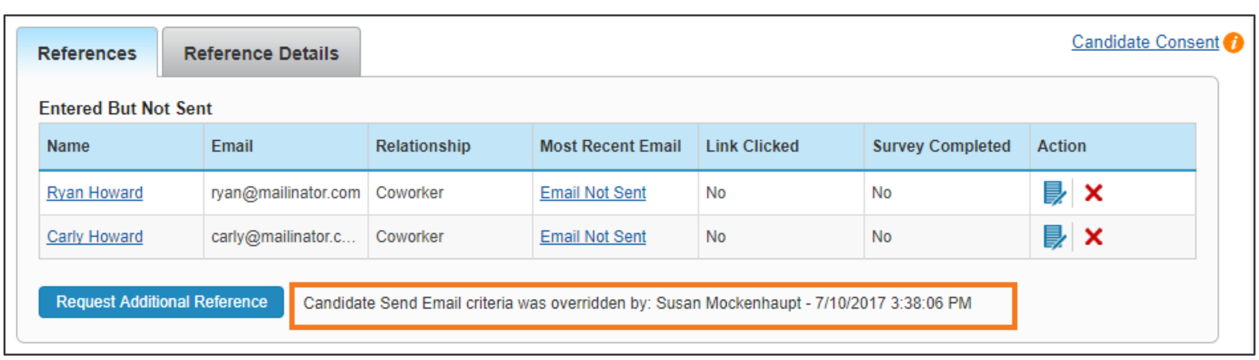
To override reference requirements:

- Access the **Candidate Details** page for the Candidate
- In the References, click the **Override Reference Requirements** link
- You will be prompted to confirm the reference override
- The name of the recruiter, date and time the override was enabled will be listed



If the override is used, the link will change to note:

- Recruiter name who overrode the requirements
- Date of the override



How to Finalize a Candidate

In this section, you will learn to:

- Finalize a Candidate using the recruiter status email notification
- Finalize a Candidate from within the SkillSurvey Reference product

Once the minimum numbers of References have submitted surveys for a Candidate, the Candidate will automatically move to the **Waiting to Finalize** status, at which time the Candidate can be finalized, and the SkillSurvey Reference Feedback Report can be run.

There are several ways you can find Candidates in the **Waiting to Finalize** status**:**

- Via SkillSurvey Reference email notification
- Via the Home page dashboard
- Via the Manage **Candidates** page

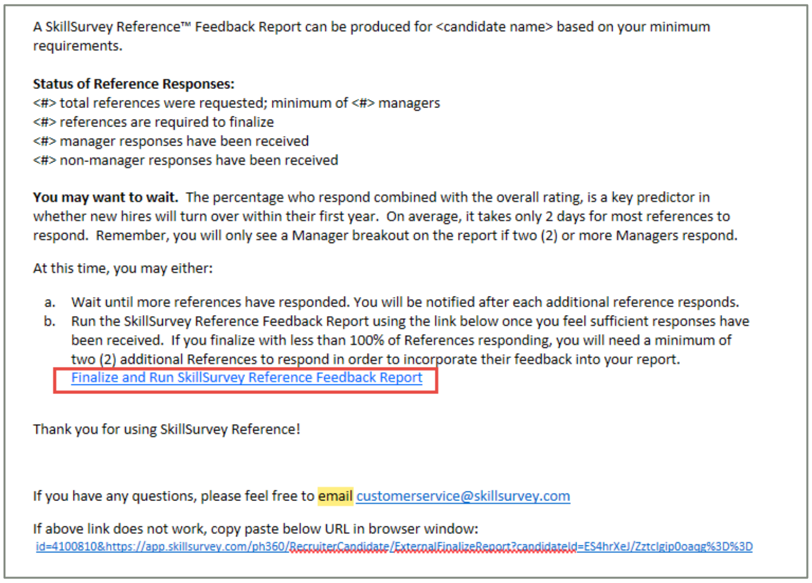
Key Thing to Note:

- You can only finalize Candidates within divisions allowed by your permissions

Finalize a Candidate via Email Notification

Once the minimum numbers of References have submitted their surveys and the Candidate is in the **Waiting to Finalize** status, you will receive an automated email message from SkillSurvey Reference that contains a link, which you can click to go to the **Candidate Details** page, finalize the Candidate, and run the SkillSurvey Reference Feedback Report.

1. Click the link in the email notification to log in to SkillSurvey Reference, finalize the Candidate, and run the SkillSurvey Reference Feedback Report.



A SkillSurvey Reference™ Feedback Report can be produced for <candidate name> based on your minimum requirements.

Status of Reference Responses:
<#> total references were requested; minimum of <#> managers
<#> references are required to finalize
<#> manager responses have been received
<#> non-manager responses have been received

You may want to wait. The percentage who respond combined with the overall rating, is a key predictor in whether new hires will turn over within their first year. On average, it takes only 2 days for most references to respond. Remember, you will only see a Manager breakout on the report if two (2) or more Managers respond.

At this time, you may either:

a. Wait until more references have responded. You will be notified after each additional reference responds.
b. Run the SkillSurvey Reference Feedback Report using the link below once you feel sufficient responses have been received. If you finalize with less than 100% of References responding, you will need a minimum of two (2) additional References to respond in order to incorporate their feedback into your report.
Finalize and Run SkillSurvey Reference Feedback Report

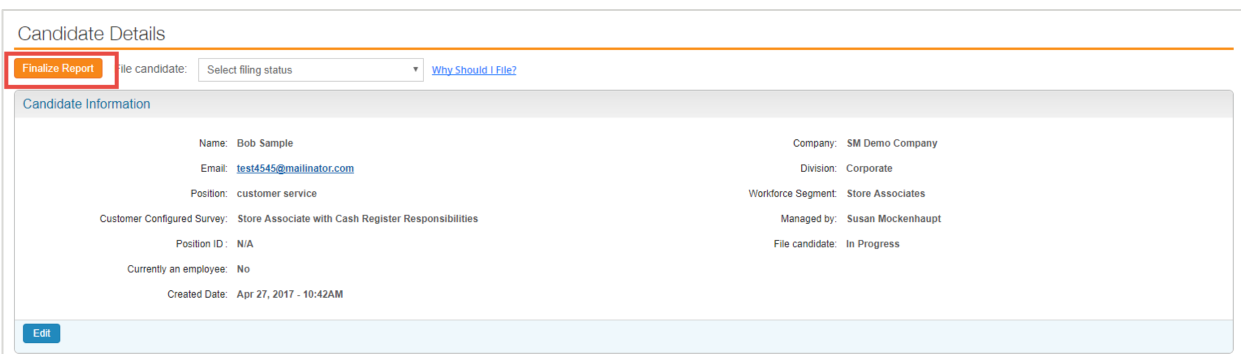
Thank you for using SkillSurvey Reference!

If you have any questions, please feel free to email customerservice@skillsurvey.com

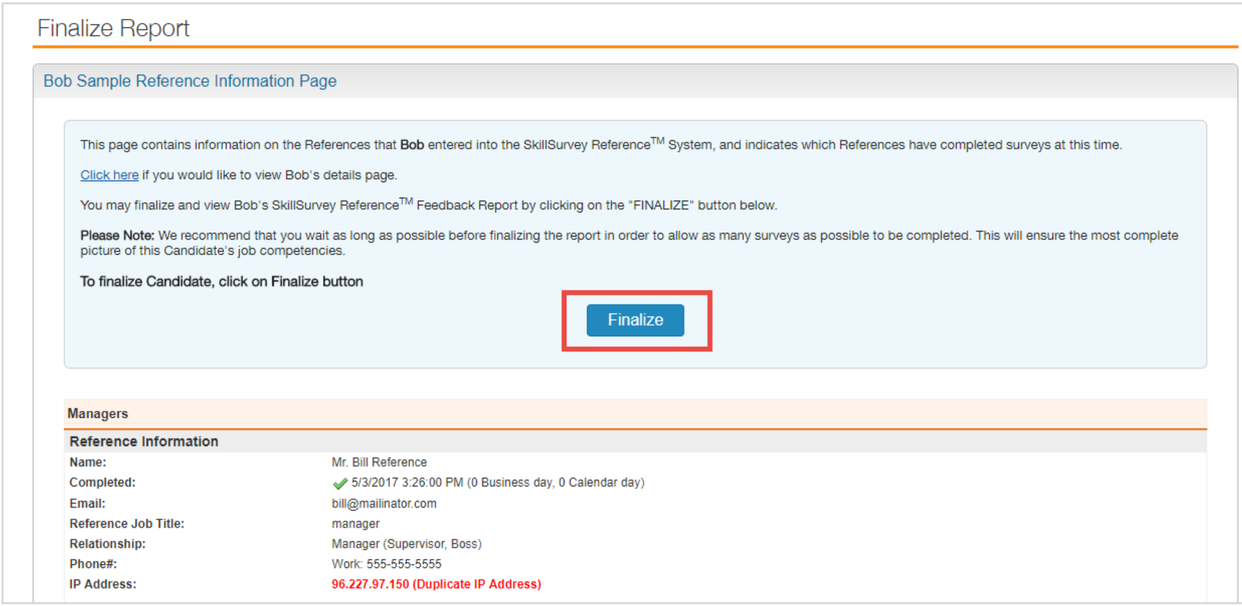
If above link does not work, copy paste below URL in browser window:
id=4100810&https://app.skillsurvey.com/ph360/RecruiterCandidate/ExternalFinalizeReport?candidateId=ES4hrXeJ/ZztcIgip0oagg%3D%3D

2. Clicking the link the email will take the Recruiter to the login page where they will log into the SkillSurvey Reference system. Once logged in, the Recruiter will land on the **Candidate Details** page for that Candidate.

   Click the enabled **Finalize Report** button and launch the **Finalize Report** page.



3. This page includes Reference information for Recruiter review. Click the **Finalize** button to finalize the Candidate and run the SkillSurvey Reference Feedback Report.



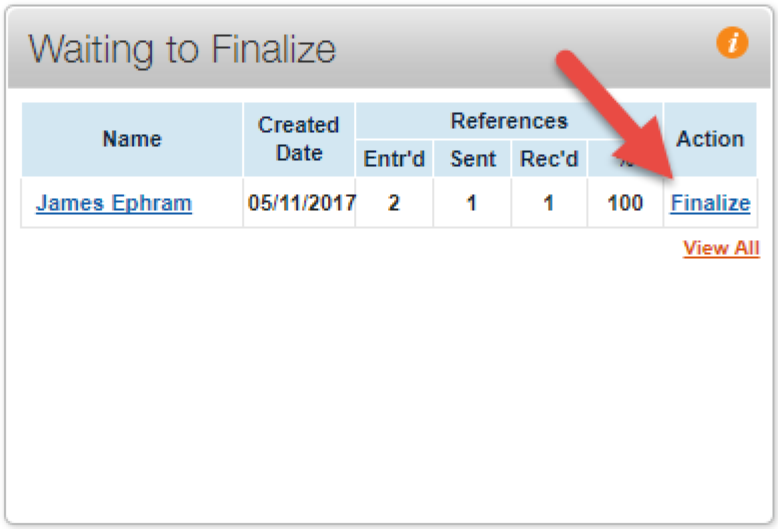
4. The SkillSurvey Reference Feedback Report is automatically launched in another window.

— The report offers the option to print, download, and email

Finalize a Candidate via the Home Page Dashboard

1. Go to the **Waiting to Finalize** widget.
2. Click the **Finalize** link and follow steps 3 & 4 in Finalize a Candidate via Email Notification section.

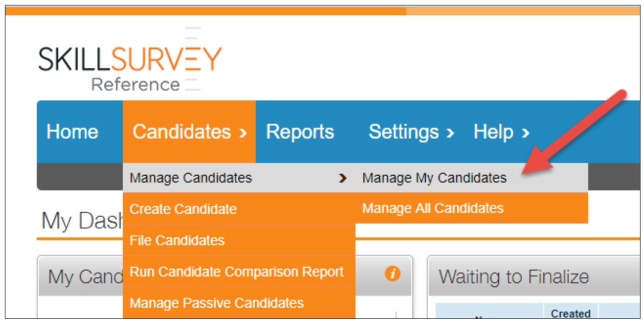
    a. If the candidate is not listed in the display window, select the **View All** link to see a full list of candidates waiting to be finalized on the **Manage Candidates** page.



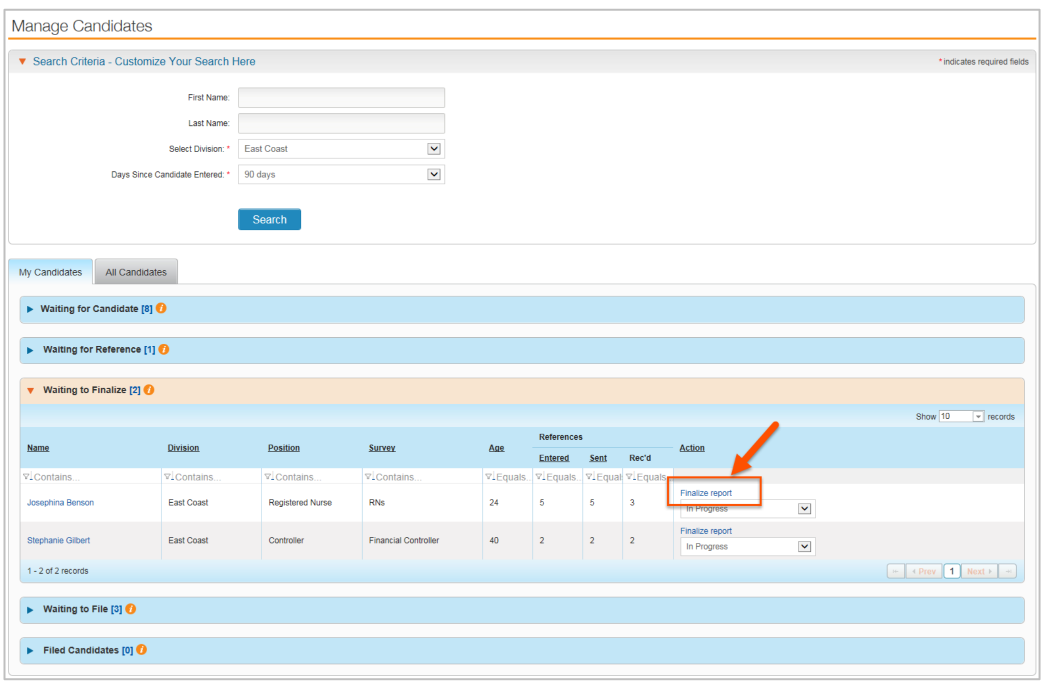
3. Follow steps 3 & 4 in the **Finalize a Candidate via Email Notification** section.

Finalize a Candidate via the Manage Candidates Pages

1. Select **Candidates** from the top navigation bar and then **Manage Candidates** and **Manage My Candidates** from the sub-menu.



2. Using the **My Candidates** tab, scroll to the **Waiting to Finalize** section and expand.
3. Locate the Candidate.
4. Select the **Finalize report** link in the **Action** column for the selected candidate.



5. Follow steps 3 & 4 in the **Finalize a Candidate via Email Notification** section.

How to File Candidates

In this section, users will learn how to file candidates that have been finalized in the system to note if they were hired or not hired. A Candidate can be filed at any time. Following are the benefits to filing a candidate:

- Ability to track hired Candidates and compare their actual performance to the reference feedback results
- Ability to track not hired Candidates and the reasons for doing so

There are several ways to file a Candidate:

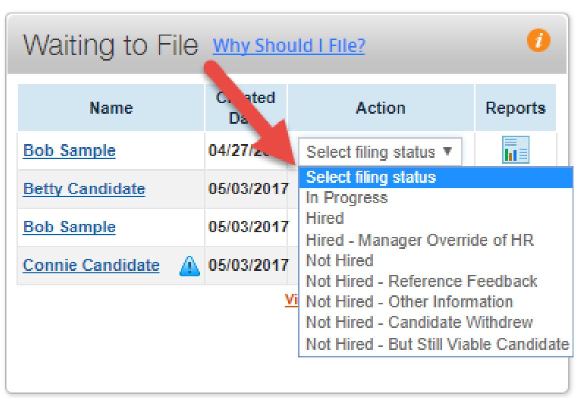
- On a Candidate by Candidate basis
- Batch updates
- File uploads

Following are the filing options for each finalized Candidate:

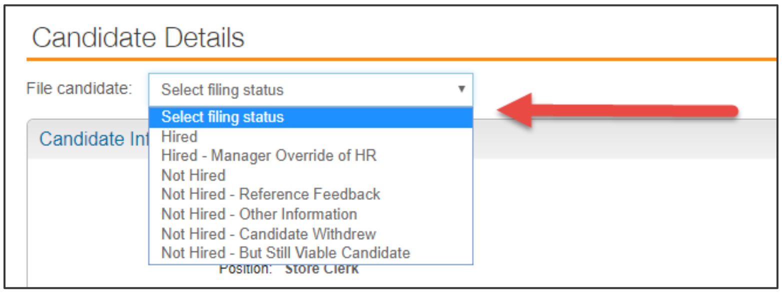
- Hired
- Hired – Manager Override of HR
- Not Hired
- Not Hired – Reference Feedback
- Not Hired – Other Information
- Not Hired – Candidate Withdrew
- Not Hired – But Still Viable Candidate

Filing on a Candidate by Candidate Basis

1. Via the **Home** page dashboard in the **Waiting to File** widget, select the **Filing Status** from the dropdown box next to the candidate name that is ready to file.



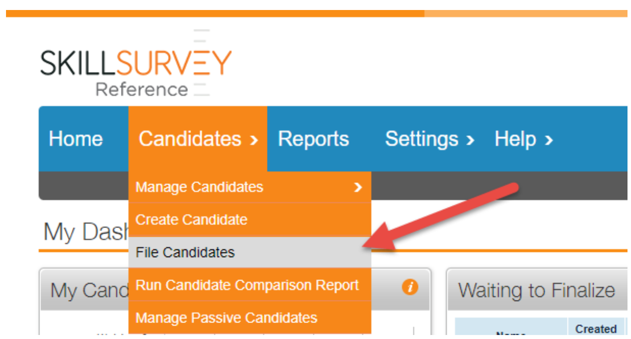
2. Access the **Candidate Details** page for the Candidate to be filed and select the filing status from the dropdown at the top of the page.



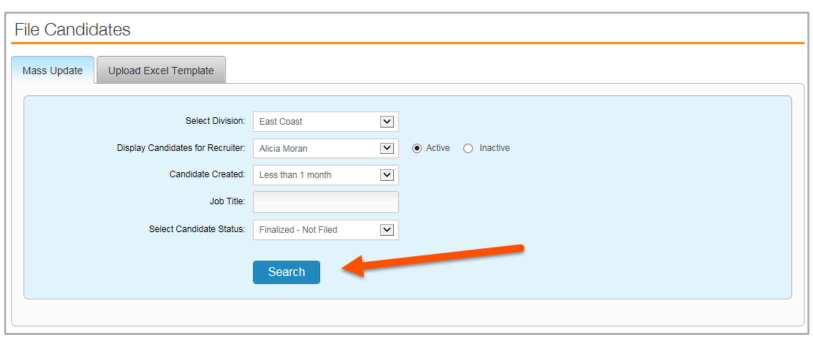
Batch Updates

Users may update multiple candidates at a time via the **Candidates** menu.

1. Select **Candidates** from the top navigation bar and select **File Candidates**.

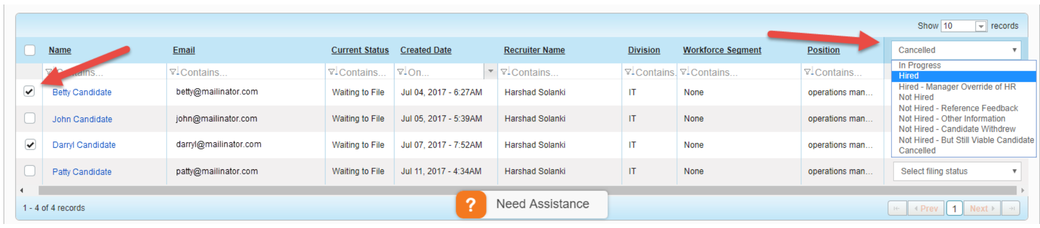


2. The default tab is the **Mass Update** tab with search criteria.



3. View the list of Candidates that meet your search criteria, select Candidates to file.

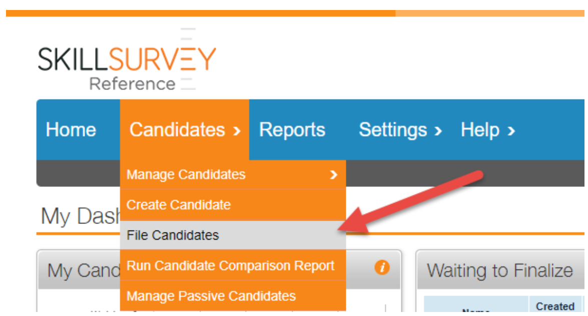
4. Select the filing status from the dropdown box in the column header to assign that filing status to all selected Candidates and click the **Save** button to apply.



File Uploads

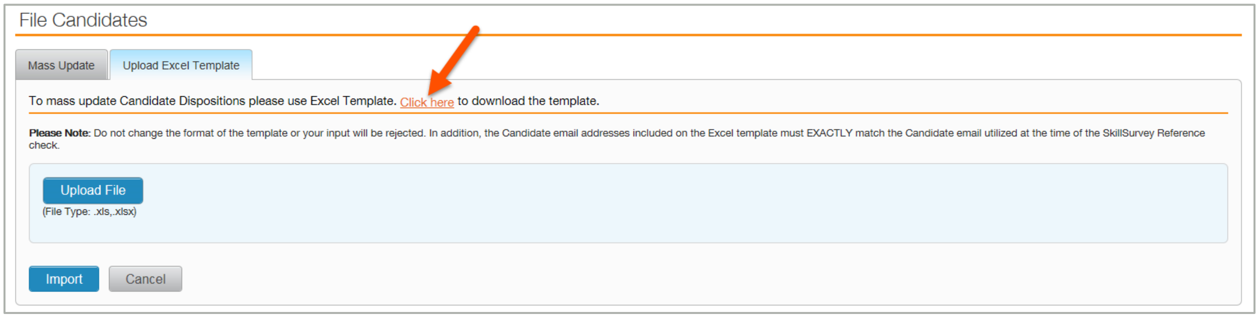
Users may export a list of Candidates and their disposition status from their ATS and upload into SkillSurvey Reference to update the filing status of all candidates on the list.

1. Select **Candidates** from the top navigation bar and select **File Candidates**



2. The default tab is the **Mass Update** tab. Select the **Upload Excel Template** tab. The correct Excel format includes the following columns with the headers in the following formats:
   - FirstName
   - LastName
   - Email
   - Status – this must be one of the SkillSurvey Reference Filing Statuses in the exact format.

An Excel template is also available for download in this tab.

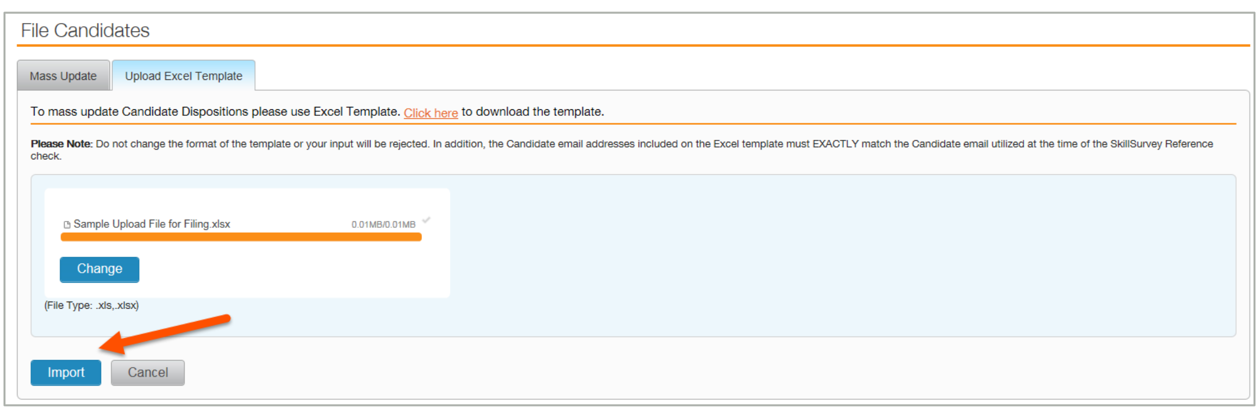


The Excel spreadsheet features a dropdown box in the **Status** column. Copy the list of Candidates from the ATS into this spreadsheet. Select the filing status for each candidate, delete any extraneous columns and data, and save the file locally on your computer.

FirstName	LastName	Email	Status
Louie	Reir	louie@mailinator.com	Not Hired
Gladwyn	Paget	gladwyn@mailinator.com	Hired
Sam	Miller	sam@mailinator.com	

In Progress
Hired
Hired - Manager Override of HR
Not Hired
Not Hired - SkillSurvey Feedback
Not Hired - Other Information
Not Hired - Candidate Withdrew
Not Hired - But Still Viable Candid

3. Once a file is ready for upload, click the **Upload File** button and select the file to upload. Once uploaded, click the **Import** button.



How to View Candidate Details

In this section, users will have the ability to view and manage candidate details. All Candidate information is located on the **Candidate Details** page. To access **Candidate Details**:

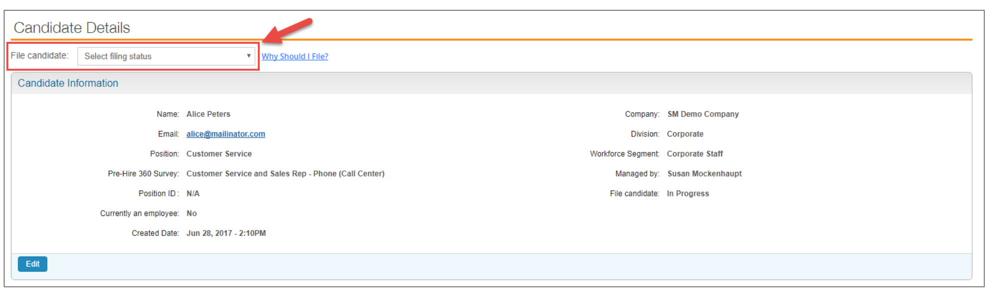
- Click the Candidate name on the **Home** page dashboard
- Search for the Candidate and click the Candidate name in the **My Candidates** or **All Candidates** tabs

On the **Candidate Details** page, view the following information about a Candidate:

- File Candidate
- Candidate Information
- Reports
- Candidate Email Events or Candidate Communication Events (if Texting is enabled)
- References
- Notes

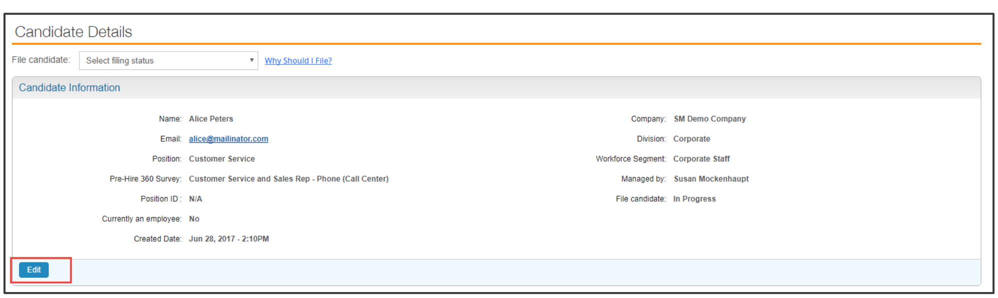
File Candidate

If the Candidate is Waiting to File, the File Candidate option will be available.



Candidate Information

Candidate Information can be modified by using the Edit button.



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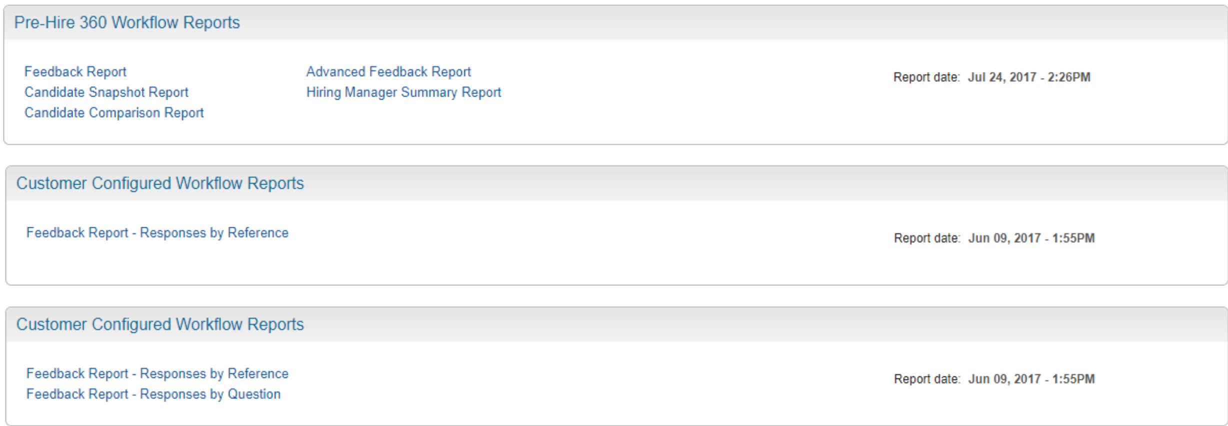
Reports

Different reports may be available for different Candidates based upon the workflow and confidentiality option applied to the Candidate.



Candidate Communication Events

Communication events show you when the initial email or text request was sent to the Candidate and when the Candidate clicked the link provided in the email or text to begin the referencing process.

If you need to resend the Candidate email, you can use the **Resend Candidate Email** button and that will be listed as an email event.

If you use the **Request Additional Reference** feature to email the link with a new message to a Candidate, this will be listed as another email event.


Candidate Communication Events — Communication link clicked on: Jan 29, 2018 - 8:41AM

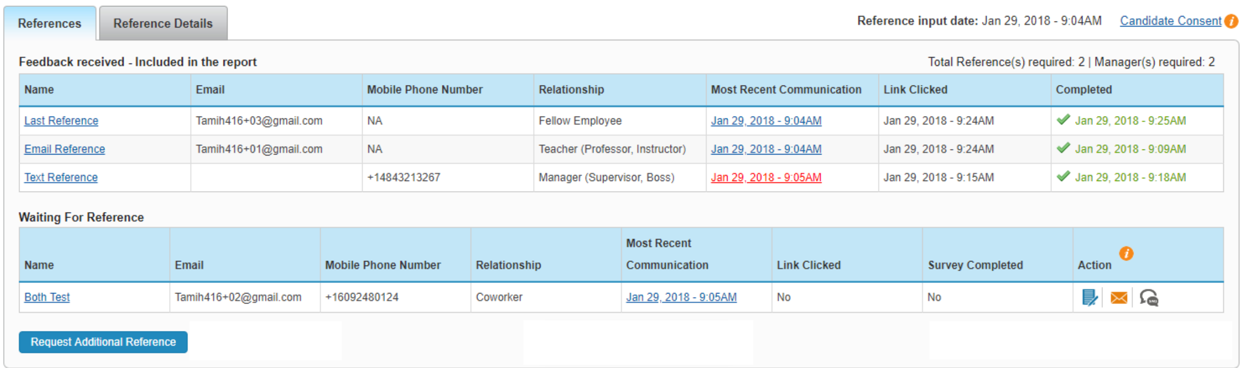
Date Sent	Sent By	Communication Type
Jan 29, 2018 - 8:39AM	Tami Henderson	Consent Text Sent to Candidate
Jan 29, 2018 - 8:40AM	System	Text Sent
May 14, 2018 - 2:13PM	Alicia Moran	Email Resent

Resend Candidate Email

References & Reference Details

References

The **References** tab lists the References grouped by status, shows basic information and provides links and icons to access more detail and actions.


References | Reference Details

Reference input date: Jan 29, 2018 - 9:04AM Candidate Consent

Feedback received - Included in the report

Total Reference(s) required: 2 | Manager(s) required: 2

Name	Email	Mobile Phone Number	Relationship	Most Recent Communication	Link Clicked	Completed
Last Reference	Tamih416+03@gmail.com	NA	Fellow Employee	Jan 29, 2018 - 9:04AM	Jan 29, 2018 - 9:24AM	Jan 29, 2018 - 9:25AM
Email Reference	Tamih416+01@gmail.com	NA	Teacher (Professor, Instructor)	Jan 29, 2018 - 9:04AM	Jan 29, 2018 - 9:24AM	Jan 29, 2018 - 9:09AM
Text Reference		+14843213267	Manager (Supervisor, Boss)	Jan 29, 2018 - 9:05AM	Jan 29, 2018 - 9:15AM	Jan 29, 2018 - 9:18AM

Waiting For Reference

Name	Email	Mobile Phone Number	Relationship	Most Recent Communication	Link Clicked	Survey Completed	Action
Both Test	Tamih416+02@gmail.com	+16092480124	Coworker	Jan 29, 2018 - 9:05AM	No	No	

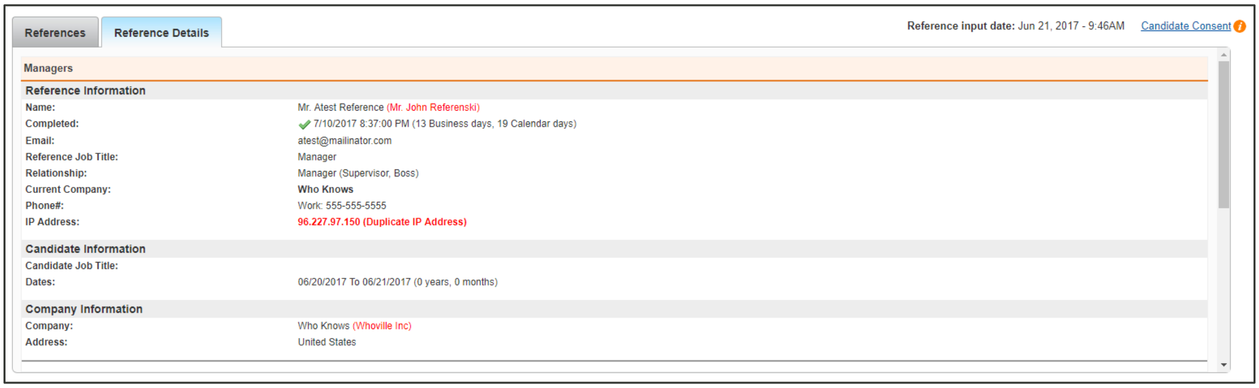
Request Additional Reference

Links and action icons in this section include:

- **Candidate Consent** link provides the ability to read and print the consent that the Candidate agrees to when inputting References
- **Reference Name** link provides detailed contact and relationship information
- **Most Recent Communication** column timestamp link opens a popup that shows the Reference's email and text history
- **Reference Email** icon provides the ability to edit the Reference's email address and send the Reference email to the new email address. If this link is in red font, this means the Reference mobile phone number is invalid.
- **Edit** icon provides the ability to edit Reference email or mobile phone number information only
- **Envelope** icon provides the ability to resend the Reference Email
- **Text** icon provides instructions for the Reference to initiate the request to resend their text by texting the word **Resend** to 57655.

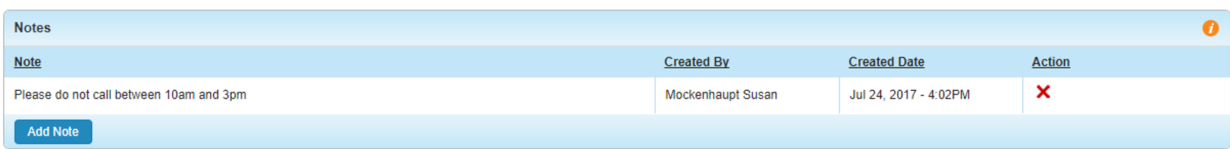
Reference Details

The **Reference Details** tab provides a summary list containing detailed information on all the Candidate's References.



Notes

The **Notes** section provides the ability to add notes about the Candidate, which will be available to all Recruiters with access to the Candidate, and will be included on the **SkillSurvey Reference Feedback Report**.



Notes will also be included in the **SkillSurvey Reference Advanced Feedback Report** if enabled by an Administrator within the configuration settings.

Notes can be deleted.

How to Run Candidate Reports

In this section, users will learn how to launch SkillSurvey Reference reports for Candidates who have already been finalized and are in the **Waiting to File** status, **Available to Re-Finalize** status and **Filed** status. (Learn how to finalize a Candidate in the How to Finalize a Candidate section.)

- How to launch Candidate Reports from the home page dashboard
  - SkillSurvey Reference™ Feedback Report
  - SkillSurvey Reference™ Advanced Feedback Report
  - SkillSurvey Reference™ Hiring Manager Summary Report
  - SkillSurvey Reference™ Candidate Comparison Report
- How to create a Candidate Comparison Report from the main menu

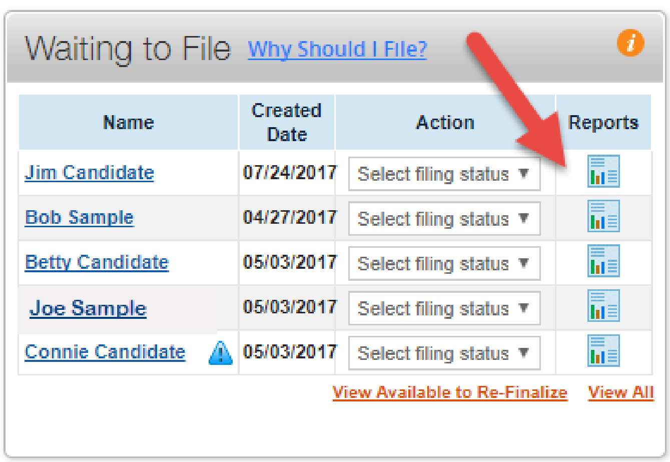
Note: different reports are available to different Candidates based on the workforce segment, workflow and confidentiality option applied to each Candidate.

Launch Candidate Reports from the Home Page Dashboard

Note that different reports are available to different Candidates based on the workforce segment, workflow and confidentiality option applied to the Candidate.

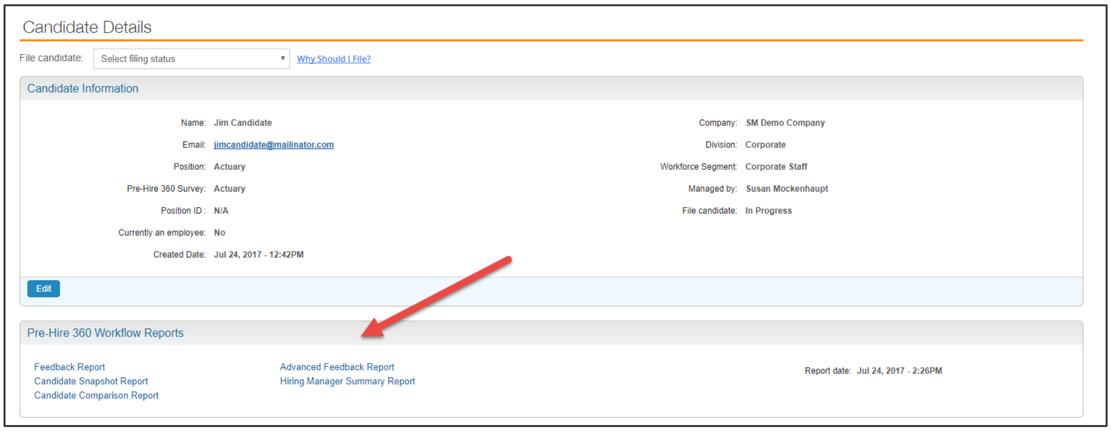
Waiting to File widget – Report icon

Click the **Report** icon to launch the **SkillSurvey Reference Feedback Report** for a Candidate shown in this widget.

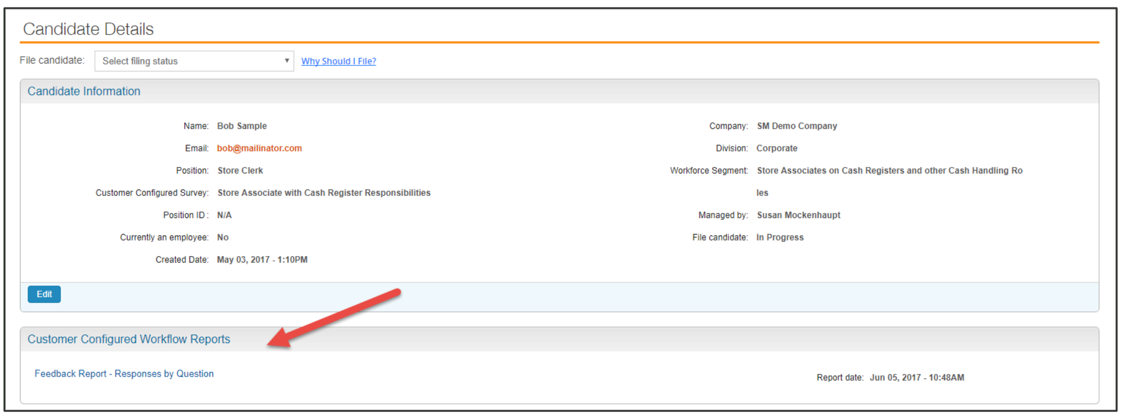


Waiting to File widget – Candidate Name

Click the **Candidate Name** link to launch the **Candidate Details** page and look for report links in the **Reports** section. The timestamp to the right shows you when the Candidate was finalized.



The report links available are dependent upon the workflow and confidentiality options applied to the Candidate.

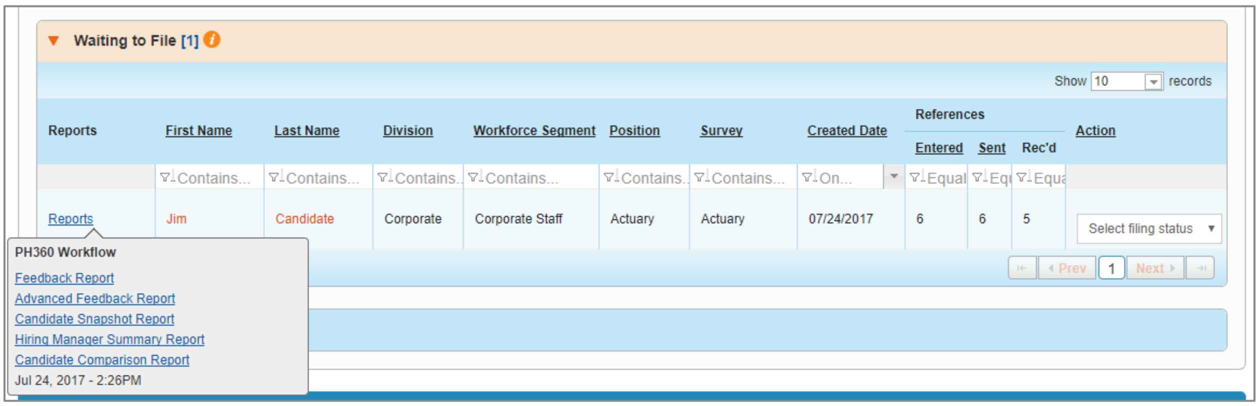


Launch Candidate Reports from the Manage Candidates Page

Note that different reports are available to different Candidates based on the workforce segment, workflow and confidentiality option applied to the Candidate.

My Candidates

Select **My Candidates** from the **Candidates** menu under **Manage Candidates**. The **Waiting to File, Filed Candidates,** and **Available to Re-Finalize** sections will contain a link in the **Reports** column, which provides a list of report links available for the Candidate.

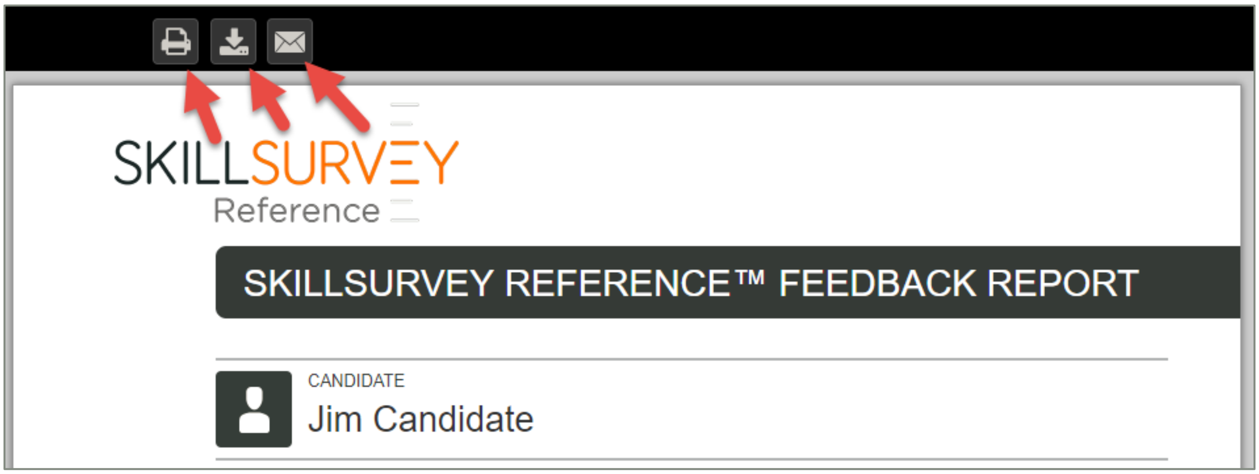


All Candidates

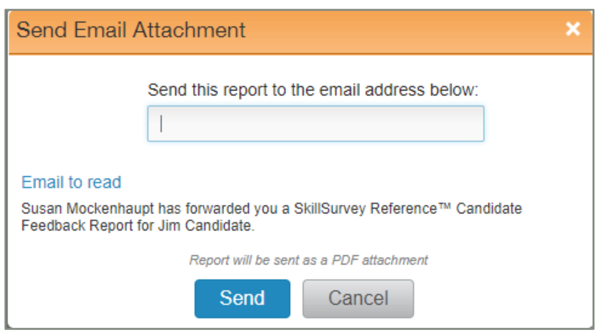
Select **All Candidates** from the **Candidates** menu under **Manage Candidates**. Candidates with a status of **Waiting to File, Filed, or Available to Re-Finalize** will contain a link in the **Reports** column, which provides a list of report links available for the Candidate.

Share a Candidate Report

Once the report is launched, you have the option to print, download, and email it using the buttons at the top.



To email the report, you will have a pop-up window to enter an email address and send the report as a PDF attachment.



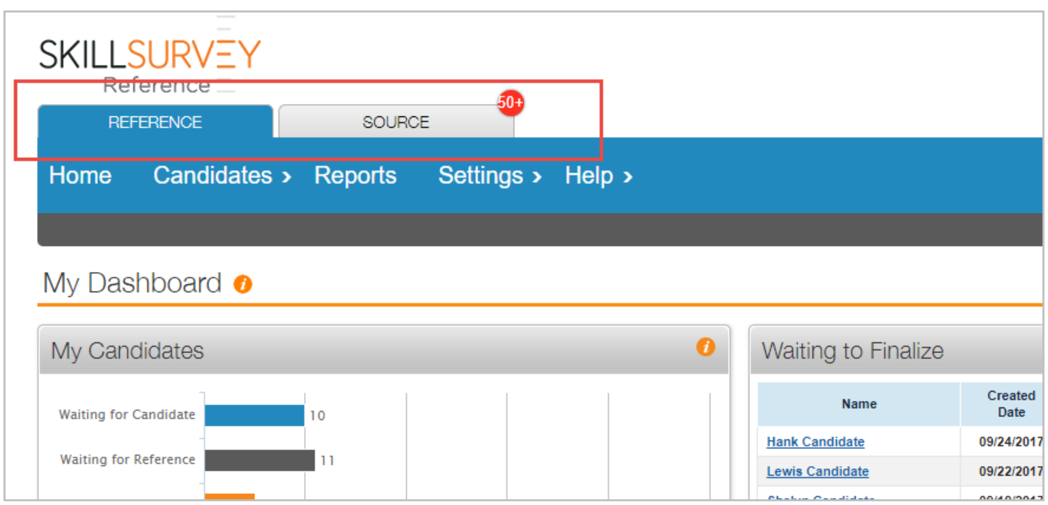
How to Manage Passive Candidates & New Employee Referrals in Source

In this section, learn how to manage Passive Candidates and Candidate Referrals in SkillSurvey Source. This is an optional feature.

There are several types of Passive Candidates in Source:

- **References:** References opt-in to a company's passive candidate network by indicating their interest after they submit their survey for a Candidate.
- **Referrals:** As Candidates are filed as "Hired" or finalized, they will receive an automated email asking them to refer others who might be a good fit for the organization. Candidates will enter their Referrals and invite them to opt-in to your talent network. If they opt-in, they are listed as **Referrals**.
- **Silver Medalists:** When a Candidate is filed as "Not Hired – But Still Viable Candidate" in SkillSurvey Reference, that Candidate is automatically added to your Source database as a **Silver Medalist.** When you see a Silver Medalist, you'll know you already have a SkillSurvey Reference feedback report and this will help reduce the time to fill for your open positions.
- **Entered by Recruiter:** Recruiters can enter Passive Candidates into the system and upload a resume. These Passive Candidates are called "Entered by Recruiter".
- **Entered on Own:** In Source, you may publish and post a link to allow Passive Candidates to opt-in on their own.

When Source is enabled, there will be two tabs at the top of the screen. One for SkillSurvey Reference and one for SkillSurvey Source.



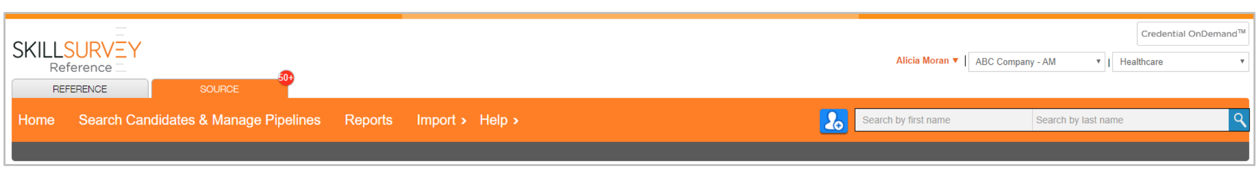
The number in the red bubble shown on the top right of the Source tab indicates the number of Passive Candidates that have opted in that you have not viewed yet. This is individual to each Recruiter.

Click on the Source tab to open your Source Dashboard.

Source Navigation

In Source, the orange global navigation bar features the following:

- **Home:** The home page is your Source Dashboard.
- **Search Candidates & Manage Pipelines:** Click this to open the search page.
- **Reports (Admins Only):** Business Analytics reports related to Source.
- **Import:** Recruiters can import an Excel file of Passive Candidates into Source.
- **Help:** Contact customer support or access our online FAQs.
- **Create a Passive Candidate:** This blue icon button launches a screen so Recruiters can enter Passive Candidates into the system along with uploading a resume.
- **Search:** Search for Passive Candidates by their first and last names.



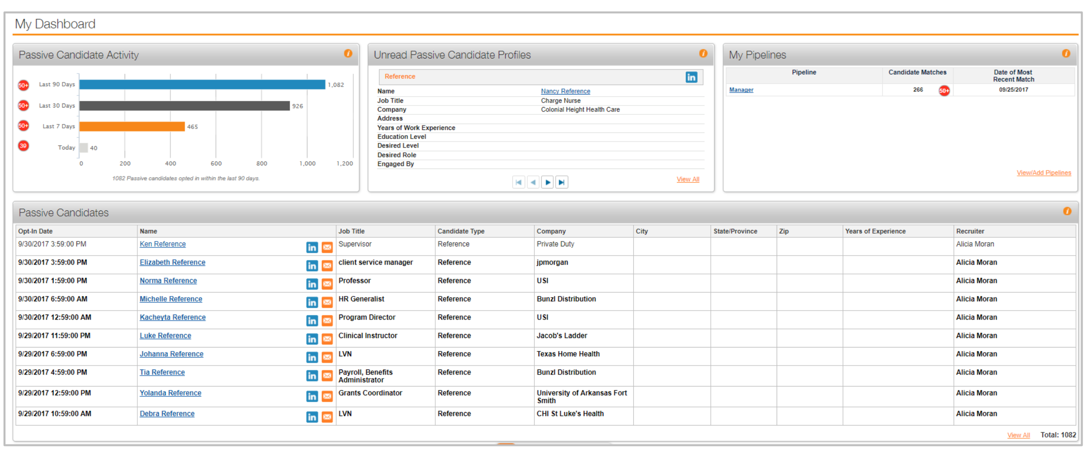
Source Dashboard

The Dashboard is comprised of 5 widgets:

- **Passive Candidate Activity:** Features the number of Passive Candidates that have opted in to your talent network with the last 90 days and broken down by 90, 30, 7 and today. The number in the red bubble to the left of the chart indicates the number of Passive Candidates the individual Recruiter has not viewed yet.
- **Unread Passive Candidate Profiles:** Each Recruiter's unread Passive Candidate profiles will be shown here and the Recruiter can scroll through a quick overview of each person. Once the Recruiter scrolls through the overviews, this will be considered "read".
- **My Pipelines:** This widget features an individual Recruiters saved searches and identifies the number of Passive Candidates that have opted in within the last 90 days that meet the saved search criteria. The number in the red bubble indicates the number of Passive Candidates that the Recruiter has not viewed yet.
- **Passive Candidates:** This widget features the last 10 Passive Candidates that opted in shown in a linear format. The number in the bottom right hand corner of the widget shows the total number of Passive Candidates in your network.

Key things to note:

- Each Passive Candidate name is a link. Click on it and it will open that Passive Candidate's profile.
- Click on the bars in the **Passive Candidate Activity** widget and it will launch the list of those matching Candidates.
- Recruiters will see all Passive Candidates in divisions to which they are associated. This differs from the "Reference" dashboard which only shows Candidates in the division selected in the top right.



The Candidate Process

This section explains the Candidate Process

- Candidate Best Practice Email (optional)
- Candidate Email with link to Enter References
- Candidate Texts (optional)
- Candidate Enters References
- Candidate Consent

Key Things to Note:

- The process for the Candidate begins after the Candidate is entered into the system by a SkillSurvey Reference user or is created via integration from an Applicant Tracking System (ATS)
- Emails are sent immediately upon creation
- Email reminders are sent to Candidates at 24 and 48 hours after being created if they have not entered and sent the email to their References
- Texting is available for US-based phone numbers only
- The Recruiter must check off they have consent from the Candidate to send them a text
- Candidates who receive a text will click a link to enter their References via the SkillSurvey Reference mobile website

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Candidate Emails & Texts

1. Once a Candidate is created successfully, an email is sent to the Candidate in order to begin the reference process.

    a. The Candidate is offered options to continue in a preferred language.
    English | Deutsch | Español | Français | Português | 繁體中文
    (English, German, Spanish, French, Portuguese, Simplified Chinese)

2. The Candidate will then receive the **Candidate Best Practice Email**, if enabled.

English | Deutsch | Español | Français | Português | 繁體中文

From: Organization Name Recruiting
To: Patrick Thomas
Subject: Organization Name Reference Checking Process

Hello Patrick,

Thank you for your continued interest in **Organization Name**. An important part of the hiring process is reference checking. You will be receiving an email with a link to enter in your references: 5 total of which 2 must be current or past managers/supervisors . If you are a recent graduate, teachers, professors and instructors may qualify as manager references.

If there is any reason why you cannot complete this within 24 hours, please contact your recruiter at Organization Name.

Please contact your references to let them know what to expect so they will watch for the web link via email. This will help the process to move smoothly and quickly. We encourage you to log in and view the link daily so you'll know if your references have completed the report. If not, please contact them to remind them to complete the survey.

Checking your link also ensures that you are aware of any email bounces that need to be fixed. Email bounces can easily be fixed by inputting the correct email address into the SkillSurvey link. Once you do this, be sure to re-send the request to your reference.

Please refer to customerservice@skillsurvey.com if you have any technical difficulties with the process. They will walk you through the process if you need help.

For questions about the reference checking process, please contact [Recruiters_Name] at [recruiters_email].

Thank you.
[Recruiters_Name]

Tip: Candidate Best Practice Emails are managed by Administrators in Settings and can be customized by "division".

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3. The Candidate will then receive the **Candidate Email** that includes a link to the Pre-Hire 360 web page to input references.

English | Deutsch | Español | Français | Português | 繁體中文

From: Organization Name Recruiting
Sent: Tuesday, May 4, 2014
To: Patrick Thomas
Subject: Organization Name Reference Steps

Dear Patrick,

Thank you for your continued interest in the **IT Manager** position with **Organization Name**. As already explained to you, a critical step in the selection process is reference checking. **Organization Name** uses web-based reference checking for this purpose.

Please click on the link below. It will open a web page where you will input your references. You will also be able to review a sample of the questions being asked and the email that will be sent to your references. Your references will be emailed a reference survey and their responses will be submitted directly back to SkillSurvey, Inc. No one will see your references' individual responses because all responses are averaged and made available in one confidential summary report.

Note that all references will be responding as individuals, not as representatives of any company or organization.

Please click or paste this link into your browser:
http://uat-eref.skillsurvey.com/?k=i7323118

Need help?

Frequently Asked Questions: http://uat-eref.skillsurvey.com//SS.WebUI.FAQ/Candidate_FAQ.aspx?PrtID=1
Technical support: customerservice@skillsurvey.com

Tip: The Candidate will automatically receive system generated email reminders if they have not clicked the link to enter References.

From: Alicia Moran [mailto:amoran608@yahoo.com]
Sent: Sunday, April 05, 2015 4:23 PM
To: Charles Smith
Subject: Fw: REMINDER: SkillSurvey, Inc. Selection Process Information

Important Notice

Please complete Pre-Hire reference assessment as soon as possible by following the instructions below. Contact me with any questions at amoran@skillsurvey.com.

Alicia Moran

-----Original Message-----
From: Alicia Moran [donotreply@skillsurvey.com]
Sent: 4/3/2015 11:04:14 AM
To: cmsmith@email.com
Subject: ABC Company Reference Steps

Dear Patrick,

Thank you for your continued interest in the Marketing Manager position with SkillSurvey, Inc.. As already explained to you, a critical step in the selection process is reference checking. ABC Company uses web-based reference checking for this purpose.

Please click on the link below. It will open a web page where you will input your references. You will also be able to review a sample of the questions being asked and the email that will be sent to your references. Your references will be emailed a reference survey and their responses will be submitted directly back to ABC Company. No one will see your references' individual responses because all responses are averaged and made available in one confidential summary report.

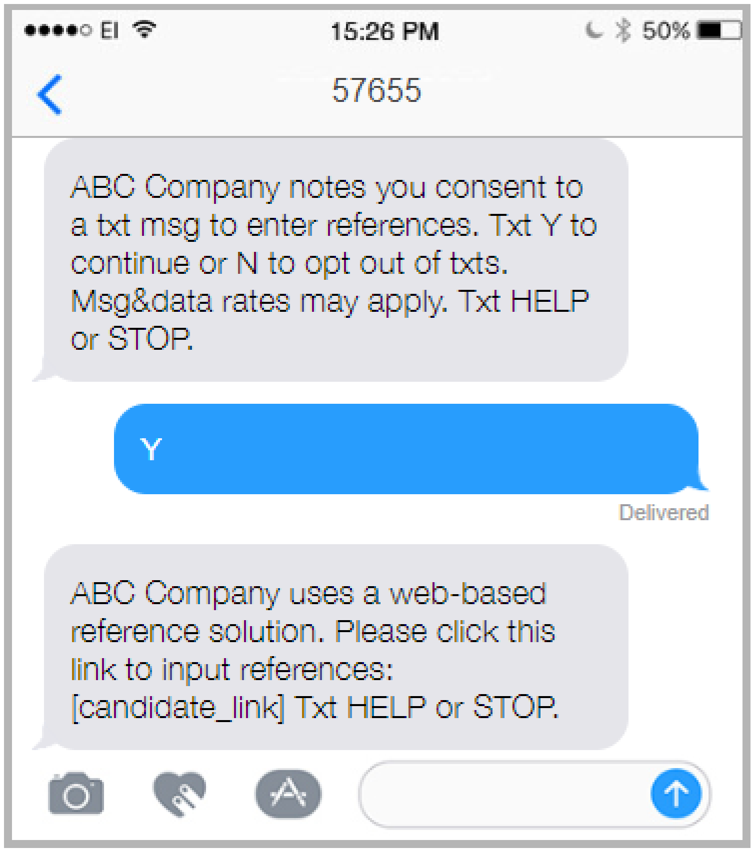
Note that all references will be responding as individuals, not as representatives of any company or organization.

Please click or paste this link into your browser:
https://app.skillsurvey.com/ph360/Candidate/Instruction?candidateId=oPzbpJ22I2tzJmDSbx8XDQ==

Need help?
Technical support: customerservice@skillsurvey.com
Process questions, please contact Alicia Moran at amoran@skillsurvey.com.

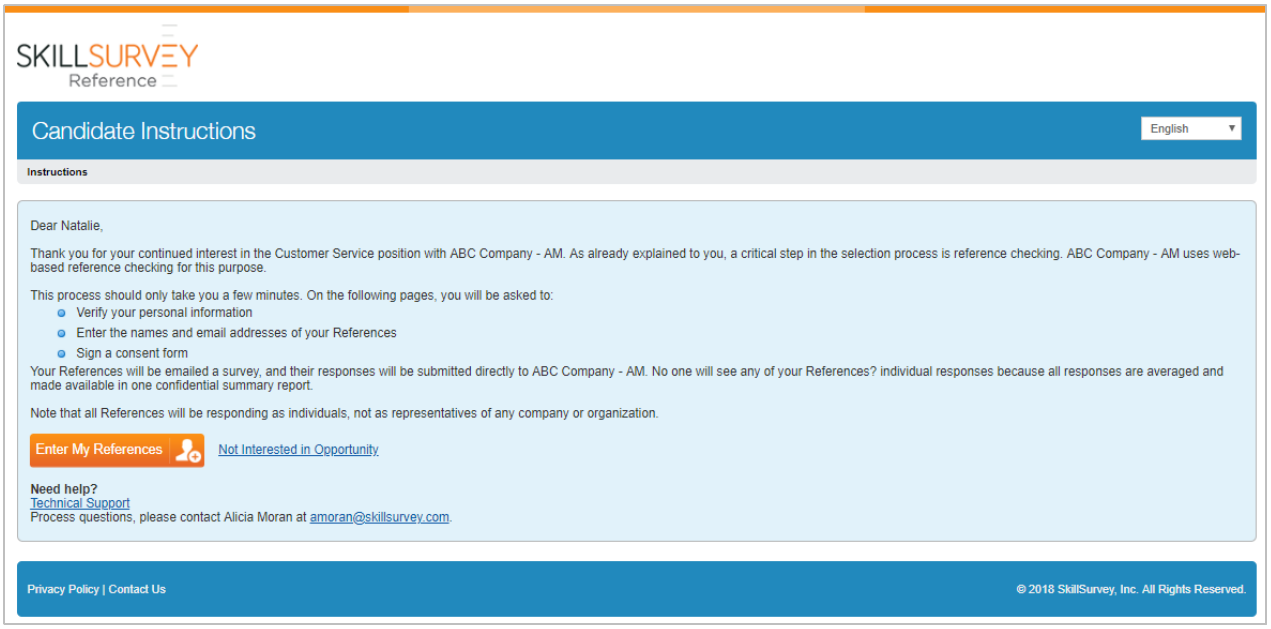
If you are no longer interested in this job, please click here:
https://app.skillsurvey.com/ph360/Candidate/OptOut?candidateId=oPzbpJ22I2tzJmDSbx8XDQ==

4. If the Recruiter enters the mobile phone number and has consent from the Candidate, the Candidate will receive two texts. The first text gives the Candidate the choice to opt-in to receiving texts or not. If they respond with "Y", they will receive a second text with a link to input References via the SkillSurvey mobile website.



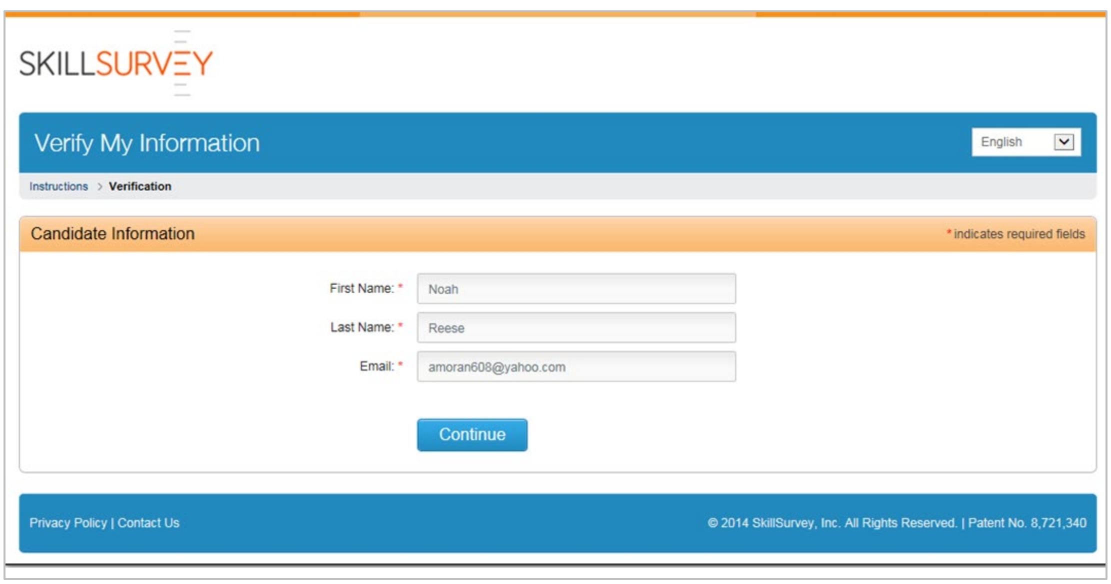
Candidate Enters References

1. The Candidate selects the link provided in the **Candidate Email** or pastes the link into their browser.

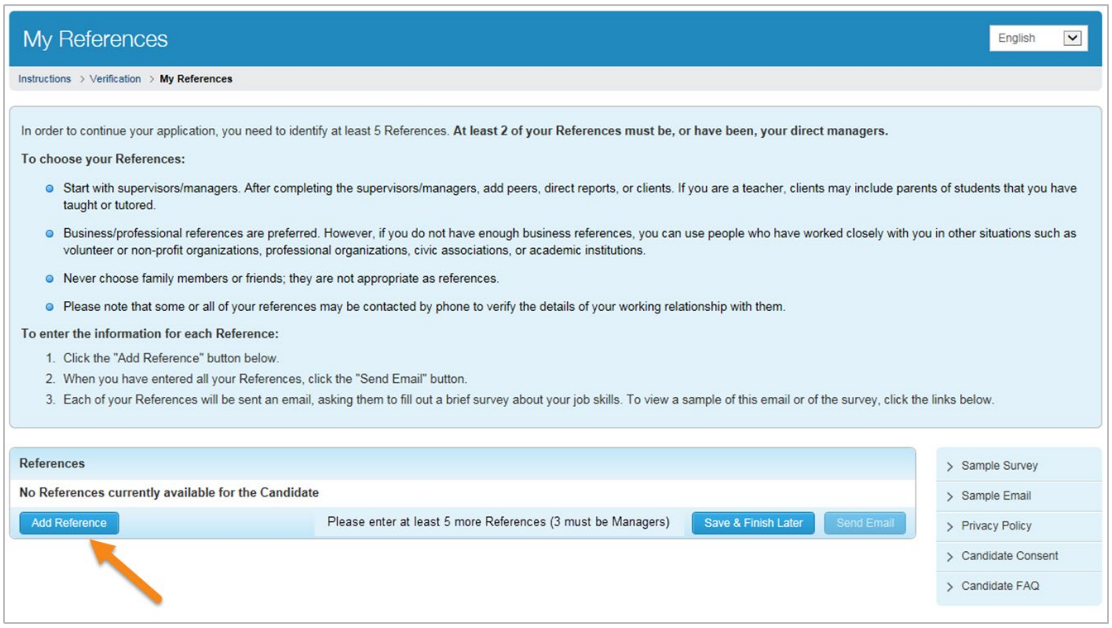


2. The Candidate selects the **Enter My References** button

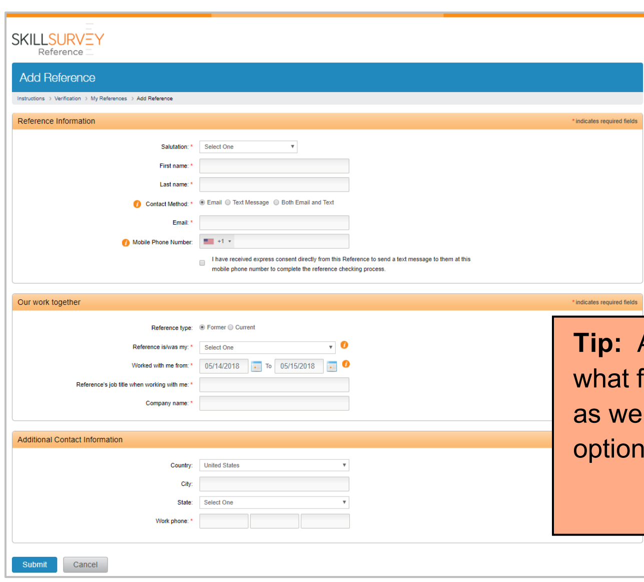
3. The Candidate verifies their first name, last name and email address and clicks **Continue**.



4. The Candidate then enters the names and email addresses of their References and selects the **Add Reference** button.
    a. Requirements for number of References and Managers (manager, co-worker, etc.) are set in **Settings→Administrative→Settings→Pre-Hire 360.**

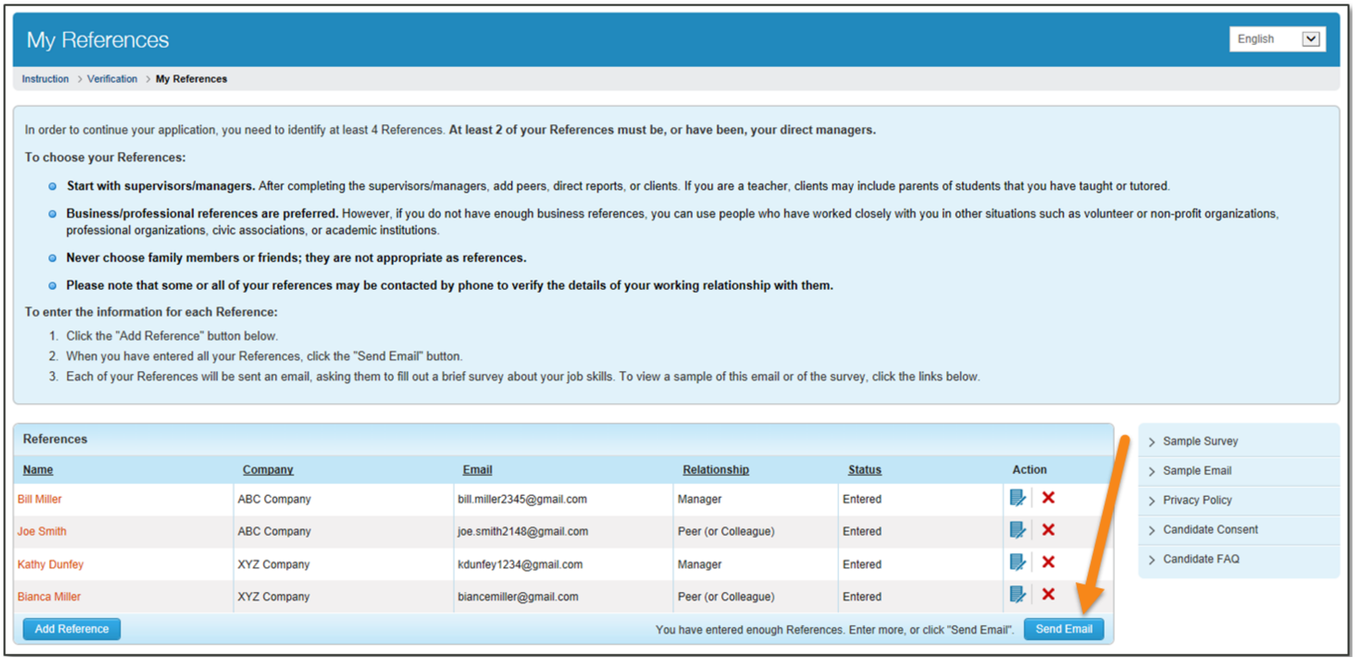


    b. For each Reference, the Candidate will enter:
        i. Reference Information
        ii. Work History with Reference
        iii. Company Information

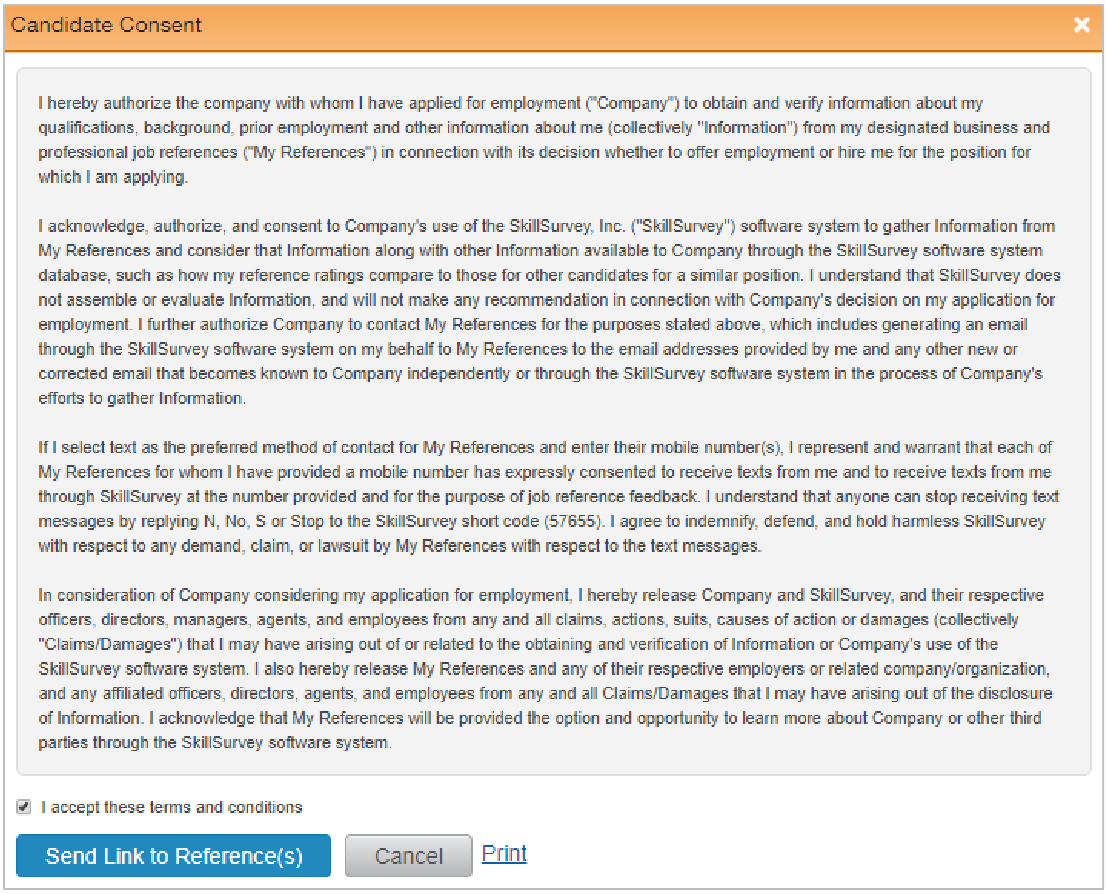


Tip: Administrators can determine what fields to collect from References as well as set fields as required, optional or hidden.

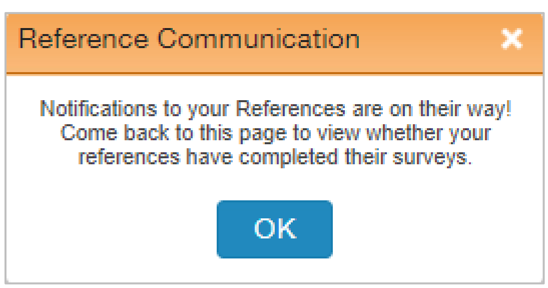
c. Once the required numbers of References have been entered, the Candidate may send the email to References by selecting the **Send Email** button.



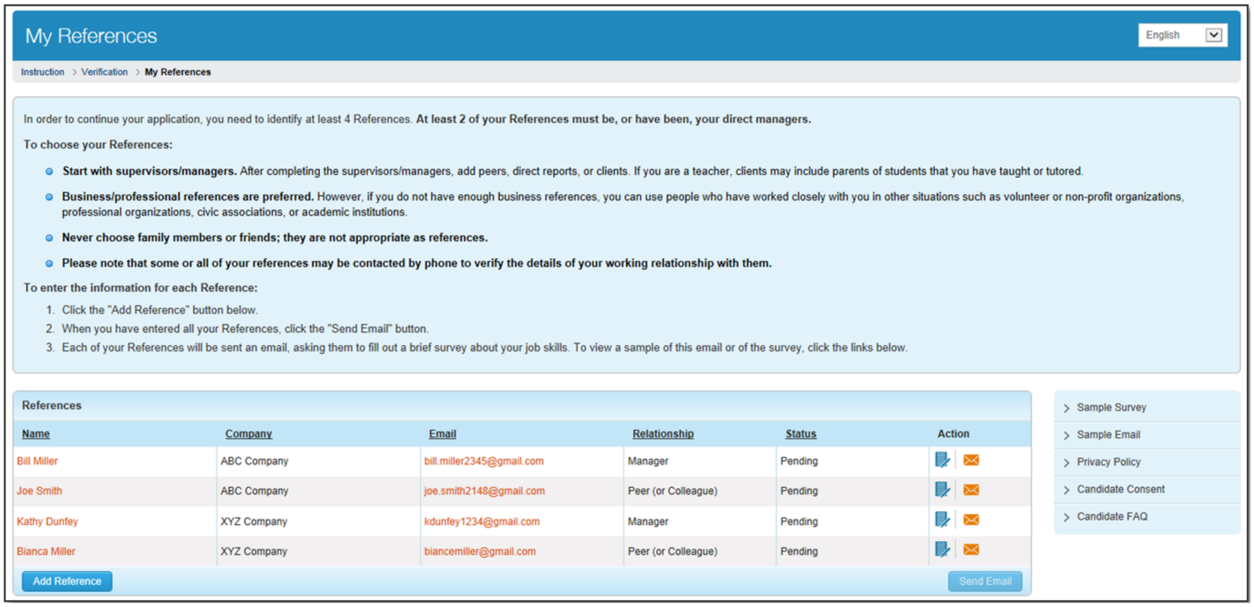
5. Once the Candidate clicks the **Send Email** button, the Candidate is required to agree to the Candidate Consent form by clicking the checkbox "I accept these terms and conditions", then the **Send Email** button.



The Candidate will see a pop-up window that confirms the sending of the Reference emails and information on accessing the page to view the status of the References' responses or resend the email if needed.



6. The Candidate may go back to the email link to check progress, add/edit reference information or resend emails.



The Reference Process

This section explains the process the Reference goes through when submitting a survey.

Key Things to Note:

- The process for the Reference begins after the Candidate enters the required number of References and executes the Candidate Consent
- If texting is enabled, Candidates may enter a US-based mobile phone number for their References
- Candidates must check off they have consent from their References in order to send a text

Reference Email & Texts

1. Once a Candidate enters their required References and sends the Reference email, an automated email sent "From" the Candidate to their References.

2. The Reference is offered option to continue in preferred language.
    a. English | Deutsch | Español | Français | Português | 繁體中文
    (English, German, Spanish, French, Portuguese, Simplified Chinese)

From: Patrick Thomas
Sent: Thursday, February 2, 2014
To: Scott Davies
Subject: Patrick Thomas Reference Request

English | Deutsch | Español | Français | Português | 繁體中文

Dear Scott Davies,

I am pursuing a career opportunity and I'm asking you, as well as several other individuals, to complete this request as a professional reference. Please complete this short (less than 30 questions), confidential, web-based survey regarding my skills. When completing the survey, if you cannot answer a question based upon your experiences when working with me, please make sure to click the "Not Observed" (N/O) button instead of selecting a number on the 1-7 rating scale.

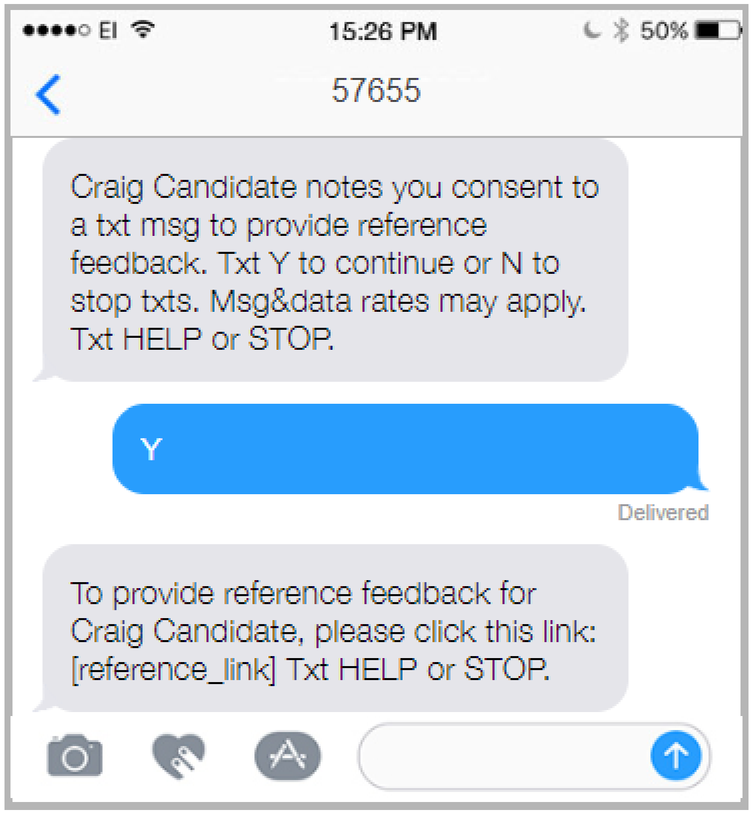
No one will see your individual responses because the system averages the responses from all of my references together to produce one summary report.

Please note that you will be responding as an individual, not as a representative of any company or organization. Also, I have executed a legally binding agreement that releases you, as well as any organization with which you are now affiliated or have been affiliated in the past, from any potential liability for providing this information. A copy of the Consent Agreement is available upon request. Please email me to advise that you would like to receive a copy.

The process is quick and easy. Please click on paste this link into your browser:
http://eref.skillsurvey.com/SS.WebUI/RefSurveyDetails.aspx?

Thank you for your time,
Patrick Thomas

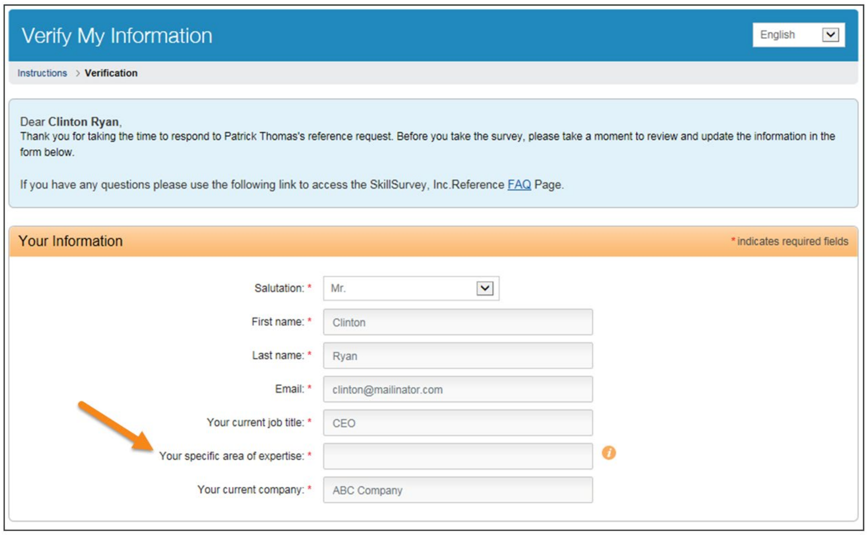
3. If texting is enabled and the Candidate enters the Reference's US-based mobile phone number, the Reference will receive two texts. The first text gives the Reference the choice to opt-in to receiving texts or not. If they respond with "Y", they will receive a second text with a link to complete a survey via the SkillSurvey mobile website.


15:26 PM
50%
57655
Craig Candidate notes you consent to a txt msg to provide reference feedback. Txt Y to continue or N to stop txts. Msg&data rates may apply. Txt HELP or STOP.
Y
Delivered
To provide reference feedback for Craig Candidate, please click this link: [reference_link] Txt HELP or STOP.

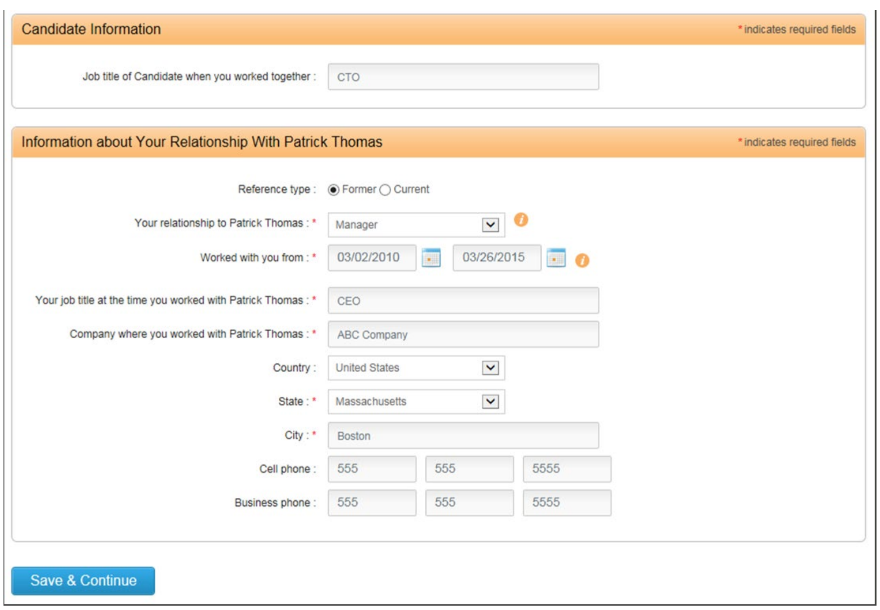
Reference Verification and Survey Completion

1. The Reference clicks the link in their email or text which launches the SkillSurvey Reference application.

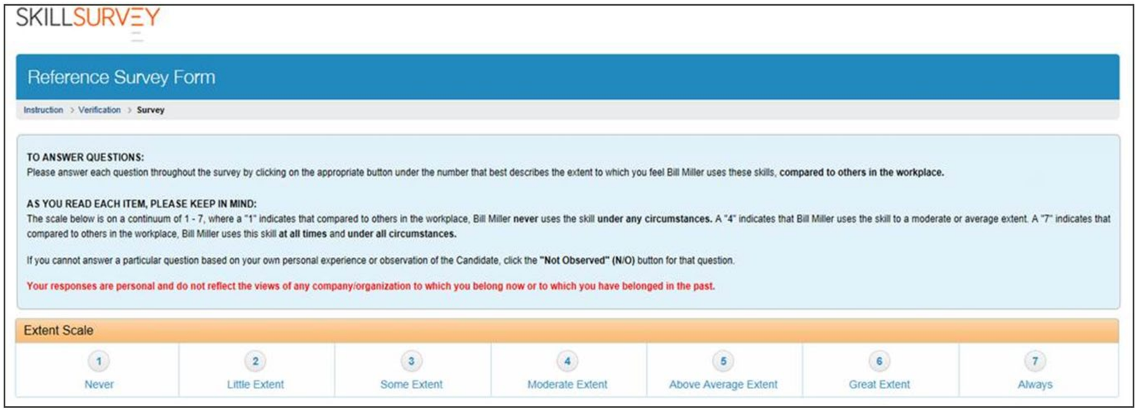
2. The Reference verifies their information and enters their **specific area of expertise.**



3. The Reference verifies Candidate information and Information about the relationship with the Candidate, selects **Save & Continue**



4. The Reference is taken to the **Reference Survey Form** where they are required to complete each of the job-specific, behaviorally-based questions.



SKILLSURVEY

Reference Survey Form

Instruction > Verification > Survey

TO ANSWER QUESTIONS:
Please answer each question throughout the survey by clicking on the appropriate button under the number that best describes the extent to which you feel Bill Miller uses these skills, **compared to others in the workplace.**

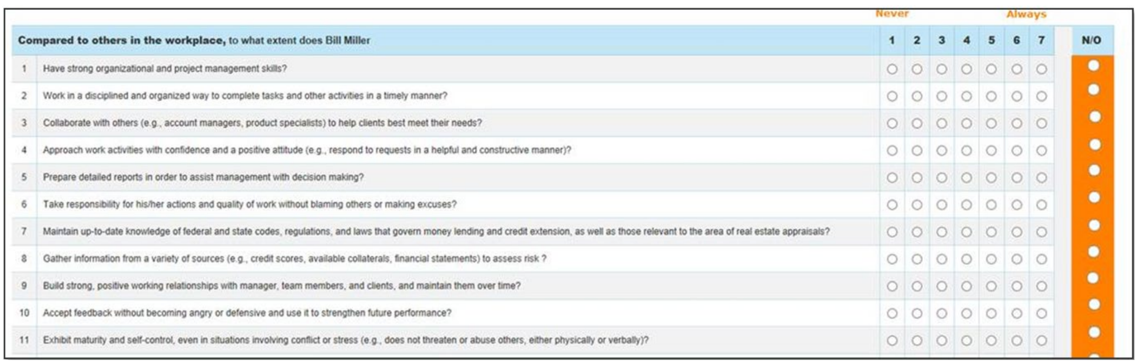
AS YOU READ EACH ITEM, PLEASE KEEP IN MIND:
The scale below is on a continuum of 1 - 7, where a "1" indicates that compared to others in the workplace, Bill Miller **never** uses the skill **under any circumstances.** A "4" indicates that Bill Miller uses the skill to a moderate or average extent. A "7" indicates that compared to others in the workplace, Bill Miller uses this skill **at all times** and **under all circumstances.**

If you cannot answer a particular question based on your own personal experience or observation of the Candidate, click the **"Not Observed" (N/O)** button for that question.

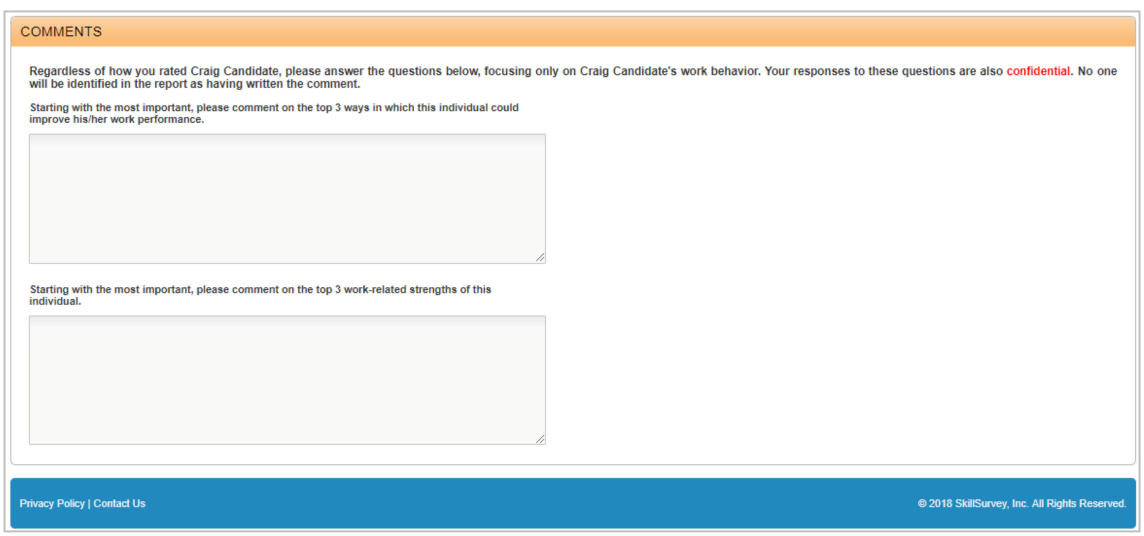
Your responses are personal and do not reflect the views of any company/organization to which you belong now or to which you have belonged in the past.

Extent Scale

1	2	3	4	5	6	7
Never	Little Extent	Some Extent	Moderate Extent	Above Average Extent	Great Extent	Always



	Compared to others in the workplace, to what extent does Bill Miller	1 (Never)	2	3	4	5	6	7 (Always)	N/O
1	Have strong organizational and project management skills?								
2	Work in a disciplined and organized way to complete tasks and other activities in a timely manner?								
3	Collaborate with others (e.g., account managers, product specialists) to help clients best meet their needs?								
4	Approach work activities with confidence and a positive attitude (e.g., respond to requests in a helpful and constructive manner)?								
5	Prepare detailed reports in order to assist management with decision making?								
6	Take responsibility for his/her actions and quality of work without blaming others or making excuses?								
7	Maintain up-to-date knowledge of federal and state codes, regulations, and laws that govern money lending and credit extension, as well as those relevant to the area of real estate appraisals?								
8	Gather information from a variety of sources (e.g., credit scores, available collaterals, financial statements) to assess risk ?								
9	Build strong, positive working relationships with manager, team members, and clients, and maintain them over time?								
10	Accept feedback without becoming angry or defensive and use it to strengthen future performance?								
11	Exhibit maturity and self-control, even in situations involving conflict or stress (e.g., does not threaten or abuse others, either physically or verbally)?								



COMMENTS

Regardless of how you rated Craig Candidate, please answer the questions below, focusing only on Craig Candidate's work behavior. Your responses to these questions are also confidential. No one will be identified in the report as having written the comment.

Starting with the most important, please comment on the top 3 ways in which this individual could improve his/her work performance.

Starting with the most important, please comment on the top 3 work-related strengths of this individual.

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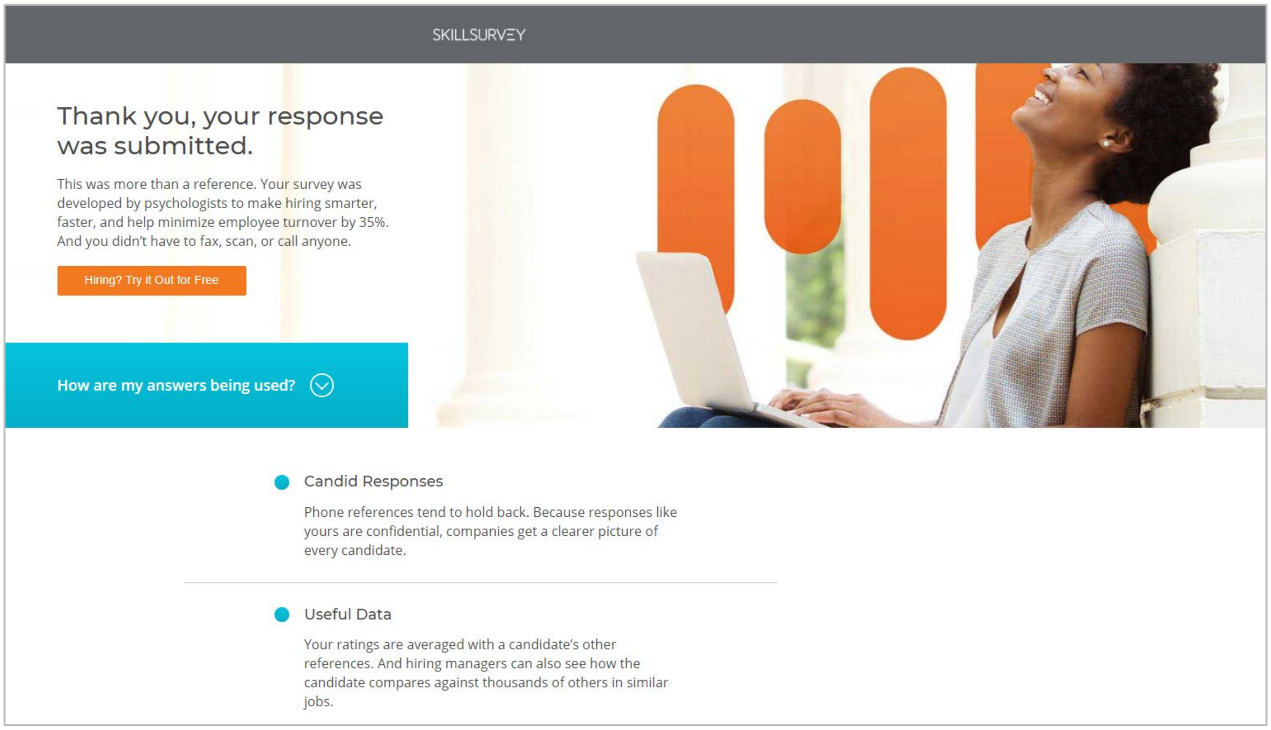
5. Once completed, the Reference receives an on-screen confirmation of survey submission.



6. Optional feature: If SkillSurvey Source is enabled, the Reference has the option to opt-in to the company's Passive Candidate network.
    a. This allows a company to source Candidates by introducing their References to job openings and capturing their information for future opportunities.