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## Standard Reference Requirements

- 3 references are required to be entered by candidates in total
- Of the 3 total references required, 2 manager (supervisor) references are required to be entered by candidates
- At least 2 references are required to finalize a candidate report
  - SkillSurvey will never allow candidate reports to be finalized if only one reference has responded per SkillSurvey’s reference confidentiality policies

Number of References ⓘ

\* Total References required to be entered by candidate:  ▾

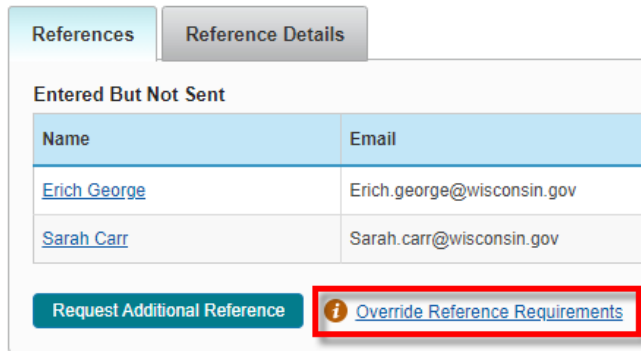
\* Manager(s) required to be entered by candidate:  ▾

## Override Reference Requirements

By default, SkillSurvey will not allow candidates to send the link to references asking them to complete the reference check until the reference requirements are met. In situations where a candidate does not have 3 references in total, or 2 supervisory references, recruiters can override the reference requirements **provided at least 2 references are entered by the candidate in total**. For example, recruiters can override the reference requirement if the candidate has entered one supervisor reference and one coworker reference. The sole purpose of this mechanism is to allow the candidate to send the link to references. All SkillSurvey recruiters have access to this functionality.

Follow the process below to override reference requirements:

1. Instruct the candidate to enter as many references as they can provide (including teachers or other community leaders) and save their progress
2. Confirm the candidate cannot provide any additional references
3. Log into SkillSurvey
4. Find the candidate you wish to apply the override to by navigating to the Candidate Details page (Candidates → Manage Candidates → Manage My Candidates)
5. Click on the candidate's name
6. Scroll to the bottom of the Candidate Details page and click on the **Override Reference Requirements** button
7. Note, you may still need to [force finalize the candidate report](#) once references have completed the reference check



The screenshot shows a web interface with two tabs: 'References' and 'Reference Details'. Under 'Reference Details', there is a section titled 'Entered But Not Sent' containing a table with two columns: 'Name' and 'Email'. The table lists two entries: 'Erich George' with email 'Erich.george@wisconsin.gov' and 'Sarah Carr' with email 'Sarah.carr@wisconsin.gov'. Below the table are two buttons: 'Request Additional Reference' and 'Override Reference Requirements'. The 'Override Reference Requirements' button is highlighted with a red rectangular border.

Name	Email
<a href="#">Erich George</a>	Erich.george@wisconsin.gov
<a href="#">Sarah Carr</a>	Sarah.carr@wisconsin.gov

[Request Additional Reference](#) [Override Reference Requirements](#)

## Force Finalizing Candidate Reports

By default, SkillSurvey will not allow a candidate report to be finalized until the reference requirements are met. SkillSurvey customer service can force finalize the report on behalf of the recruiter, in situations where only 2 references are received.

Follow the process below to request a force finalization from SkillSurvey customer service:

1. The recruiter who initiated the reference check in SkillSurvey should email [customerservice@skillsurvey.com](mailto:customerservice@skillsurvey.com) requesting the force finalization
  - a. If the email is sent by another HR professional, the recruiters who initiated the reference check in SkillSurvey and the agency SkillSurvey admin should be Cc'd

2. Include the following information in the request:
  - a. SkillSurvey Company = State of Wisconsin
  - b. SkillSurvey Division = [insert name of agency]
  - c. Candidate's First and Last Name

SkillSurvey customer service will then force finalize the candidate report for you. This is typically completed within 24 hours, if not sooner.

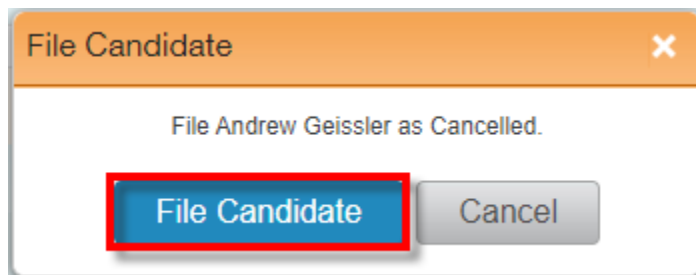
**NOTE:** In situations warranting a force finalization where 3 references cannot be obtained, HR staff should consult with the hiring manager for the vacancy to assess efforts and determine whether there are sufficient references to move forward, per [WHRH Ch. 244, Sec. 244.050 \(3\)](#).

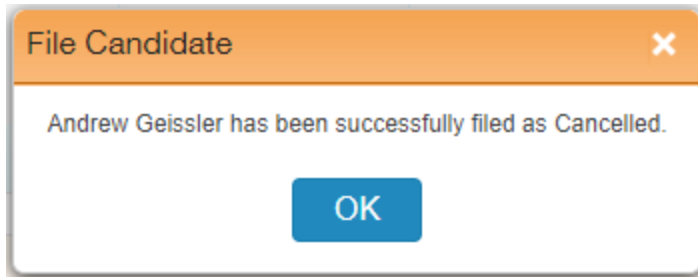
## Filing Candidate Reports as Cancelled

SkillSurvey cannot allow a reference to be conducted if the candidate has only provided one reference. Likewise, a candidate report cannot be produced if only one reference has responded. Recruiters should file the candidate as cancelled in situations where only one reference is obtained. In addition, a note should be added to the candidate's record in SkillSurvey and in the recruitment file to document the situation.

Follow the process below to file a candidate as cancelled:

1. Find the candidate you wish to file by navigating to the Candidate Details page (Candidates → Manage Candidates → Manage My Candidates)
2. Click on the **Action** dropdown to the far right of the candidate's name and select **Cancelled**
3. A pop-up window will appear – click File Candidate



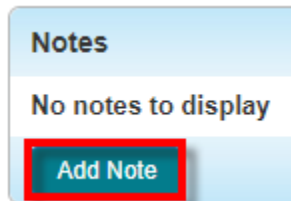


The candidate has now been filed as cancelled. Note the candidate will appear under the Filed Candidates section with a status of Cancelled by Recruiter.

### Adding a Note to the Candidate's Record

In addition, follow the steps below to add a note to the candidate's record:

1. Find the candidate you wish to add a note to by navigating to the Candidate Details page (Candidates → Manage Candidates → Manage My Candidates)
2. Click on the candidate's name
3. Scroll to the bottom of the Candidate Details page and click on the **Add Note** button



4. Type in a brief note that summarizes the situation sufficiently and click **Add**

Add Note ✕

Note: \* Candidate has insufficient references to conduct online reference check - current supervisor is hiring manager for position they are applying for and they have only one other coworker reference.

**Add**

The note will now be applied to the candidate's record in SkillsSurvey. Note icons will appear next to the candidate's name.

▼ Filed Candidates 1 ⓘ		
Reports	<u>F</u> irst Name	<u>L</u> ast Name
	▽ Contains...	▽ Contains...
	Andrew 	Geissler 

1 - 1 of 1 records

The same note should be added to the recruitment file for recordkeeping.