

# SkillSurvey - Recruiter Reference Requirements Guide

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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 ⓘ

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

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

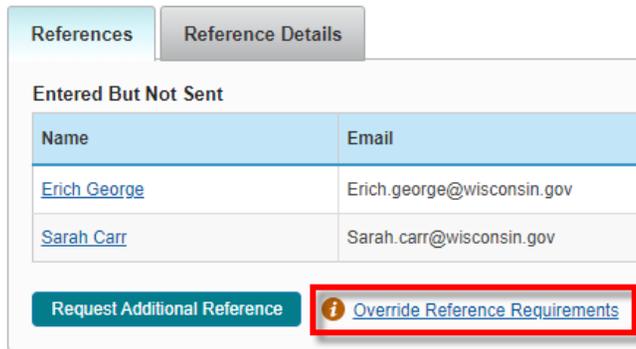
## Override Reference Requirements

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.

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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



## Force Finalizing Candidate Reports

By default, SkillSurvey will not allow a candidate report to be finalized until the reference requirements are met. Agency site administrators can force finalize the report on behalf of the recruiter, in situations where only 2 references are received. This does not change the minimum reference requirement - to Force Finalize a candidate's record, there still must be at least 2 references responding to the survey. As a reminder, the Force Finalize Request is meant for situations when a report must be generated and no further references will respond.

Follow the process below to request a force finalization from your agency site administrator:

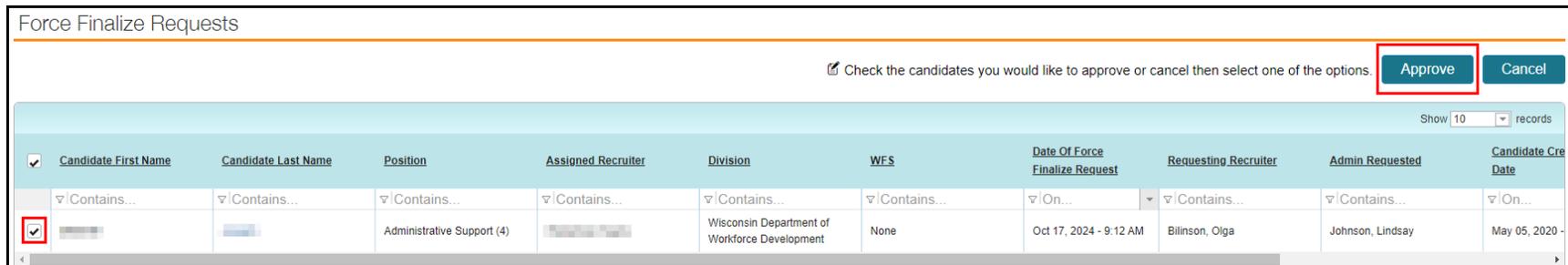
1. Find the candidate you wish to file by navigating to the Candidate Details page (Candidates → Manage Candidates → Manage My Candidates)
2. Click on the candidate's name

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3. Click on Force Finalize, in the upper right corner of the Candidate Details page
  - a. Click Continue to confirm that you understand that best practice is to wait as long as possible before finalizing
  - b. Complete the Force Finalize Request by selecting the appropriate Admin Recipient, i.e. your agency site administrator
  - c. Click Send; an email with candidate details will be sent to that site administrator requesting their review and approval

Follow the process below to review and approve force finalization requests as an agency site administrator:

1. Use the link in the Force Finalize Request email or go to the Force Finalize Requests page (Candidates → Force Finalize Requests)
2. Check the checkbox next to the candidate’s name and click Approve
  - a. Click on the candidate’s name to review Candidate Details
  - b. If you do not want to approve the request, click Cancel
3. Click OK to confirm – it may take a few minutes for the report to finalize



**NOTE:** In situations warranting 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 \(3\)](#).

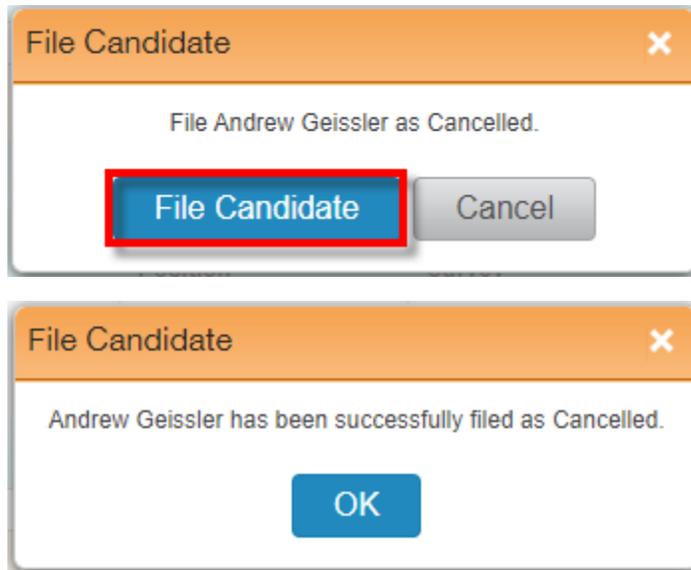
## Filing Candidate Reports as Cancelled

SkillsSurvey 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 SkillsSurvey and in the recruitment file to document the situation.

Follow the process below to file a candidate as cancelled:

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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



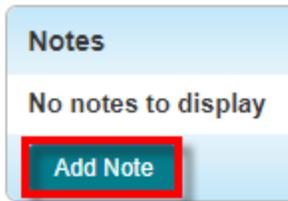
The candidate has now been filed as cancelled. Note the candidate will appear under the Filed Candidates section with a status of Cancelled by Recruiter.

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

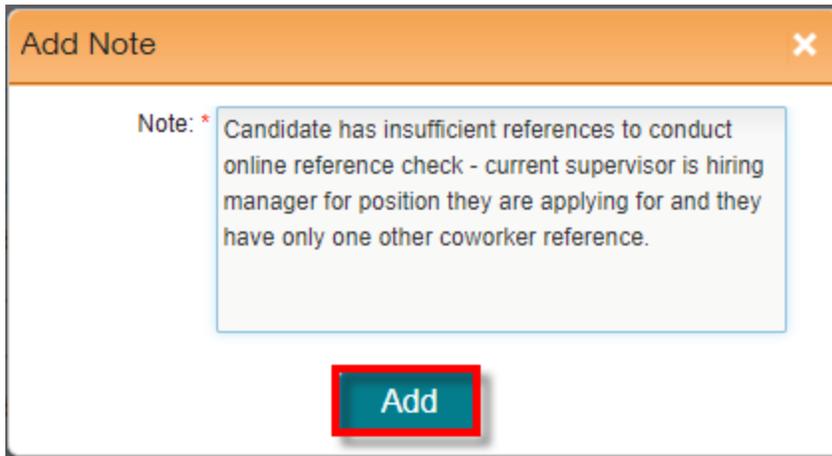
In addition, follow the steps below to add a note to the candidate's record:

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

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- 4. Type in a brief note that summarizes the situation sufficiently and click **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	First Name	Last Name
	▽  Contains...	▽  Contains...
	Andrew 	Geissler 

1 - 1 of 1 records

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