

Reference Letter Tool

Purpose: The purpose of this User Manual is to help you understand how to configure the PeopleAdmin 7 **Reference Letter Tool**. This tool is useful if you have multiple applicants in the review stage and need to contact their references efficiently. A **Reference** is a person the candidate indicated on an application to provide a **Recommendation**, which is the response form to be submit to Iowa State University.

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Configuration and Process

The steps below outline the process of the Reference Letter Tool. This automated process does not replace, but can be used concurrently with telephone reference checks, to gather recommendations for the applicant.

1. Click the Accept References box when creating a new faculty posting. This will be located on the first page you view when you begin the process of creating a new posting.
2. Once the Accept References box is checked, you will see that some optional choices are made available to you. These include Reference Notification, Recommendation Workflow, and Recommendation Document Type. Use the table below to better understand these options:

Reference Options on Posting Settings	
Reference Notification (optional)	This option will determine when the candidate reference(s) will be contacted to provide recommendations for the candidate. This is decided by selecting an appropriate workflow state. If left blank the notifications can be manually sent at any time.
Recommendation Workflow (optional)	This option will likely not be used at the University of Arkansas. The option will determine which workflow state the candidate will be moved to once the recommendations from the reference(s) have been provided.
Recommendation Document Type	This option will determine whether or not the candidate reference(s) will be required to upload a document when a Reference submits a recommendation.

- Complete the required sections of the posting (Position Details, Supplemental Questions, etc.); you will see a section titled Reference Letters. Here, you can provide specifications regarding references. Further detailed explanations of all these options can be found in the table below:

Reference Letter Section within Posting	
Accept References	By selecting Yes, the posting's application form will have a reference section to be completed by the candidate.
Minimum/Maximum Requests	This will determine how many references the candidate is required to submit with the application. Set the minimum to one, and the maximum to a number of your choice.
Cutoff Date	The date indicated will determine when the system will disable the link for the Reference to respond.
Provider Special Instructions	Use this option to provide any extra information you want to receive from a reference. This will be sent alongside the email.
Confirmation Message To Provider	

- Continue the workflow process and route the posting for approval based on your organizational structure. When the posting is on the University of Arkansas Career Site, the application will ask the **applicant for references** (optional/required and minimum/maximum based on the settings configured in step 3).
- When the applicant reaches the specified **Workflow State** (configured in step 2), an email will be sent out to the candidate's references. The references will fill out a

recommendation form and/or attach a recommendation letter within the noted time frame (*configured in step 3*). See **Providing a Recommendation Process** for more details.

6. The **applicant tab** will be updated with the information and is available for review. See **Viewing Reference's Recommendation** for more details.

Providing a Recommendation Process

Once the reference receives the email, they will give recommendations about the candidate and will be prompted to send the response back to you.

1. At the designated applicant workflow state or when manually sent, an email will be generated to the reference. In the email, the reference will be provided with a link to follow. There is also information about the position including the job title, posting number and the job summary.
2. On the website, the **Applicant Information** will be located on the top of the page. Next, there are required fields for the References to complete, such as name and contact information.
3. Next, the Recommendation section must be completed. Questions to be answered by the reference include:
 - a. *Do you decline to provide a referral for this candidate?*
 - b. *How do you know this candidate?*
 - c. *How long have you known this candidate?*
 - d. *Additional Comments*
4. If required, the reference will upload a **Recommendation Letter**. This document will automatically be converted to PDF form and attached to the applicant's information within the posting.

Viewing Reference's Recommendation

After the applicants recommendations have been sent back, you are able to review the provided information. To do this:

1. Navigate to the **posting** in PA 7 and click on the **Applicants** tab. Click the appropriate applicant's first name.
2. While viewing the **Applicant** information will you see three tabs: **Summary**, **Recommendations** followed by 2 numbers (example 1 of 1), and **History**. Click the **Recommendations** tab.
3. You will see **Reference Requests** showing if an email has been sent out to a reference.

Manual Notifications: *If notifications were not set up to auto send, they can be sent manually from this area.*

Reminder Emails: *Reminder emails can also be sent from this page by clicking resend.*

Index of Reference Emails

In this section you will see the different emails that can be sent out to the References. The email to the reference provider can be sent manually or when a candidate reaches a certain workflow state. Reference Reminders can be sent if a response has not been received and confirmation emails are automatically sent once the reference has been provided.

- Email to reference provider
- Reference Reminder
- Reference Confirmation to Applicant
- Reference Confirmation to Reference

Email to Reference Provider This email can be sent manually or automatically when an applicant reaches a certain workflow state.

Subject: An applicant with the University of Arkansas requests your recommendation



Dear {{reference_request__name}},

An applicant has applied to a position at the University of Arkansas. The applicant has requested a recommendation from you for the position for which they applied.

The applicant has applied to the following position:

Working Title: {{posting__job_title}}
Posting Number: {{posting__posting_number}}
Summary of Job Duties: {{posting__job_description_summary}}

Please click on the link below and follow the provided instructions.

Provide a reference here: {{reference_request__url}}

Thank you.

Human Resources
222 Administration
Phone: 479-575-5351
Fax: 479-575-6971
<https://askhr.uark.edu>

Reference Reminder This email can be sent manually from the recommendations tab if a response has not been received yet.

Subject: An applicant with the University of Arkansas requests your recommendation



Dear {{reference_request__name}},

An applicant has applied to a position at University of Arkansas. The applicant has requested a recommendation from you for the position for which they applied.

This is the last chance to provide the recommendation for this candidate. Please click on the link below and fill out the information and/or upload the documents requested.

The applicant has applied to the following position:

Working Title: {{posting__job_title}}
Posting Number: {{posting__posting_number}}
Summary of Job Duties: {{posting__job_description_summary}}

Please click on the link below and follow the provided instructions.
Provide a reference here: {{reference_request__url}}

Thank you.

Human Resources
222 Administration
Phone: 479-575-5351
Fax: 479-575-6971
<https://askhr.uark.edu>

Reference Confirmation to Applicant This email will be sent automatically to the applicant when a reference has been received.

Subject: Your Recommendation has been Received



Dear {{user__first_name}},

This is to inform you that we have received a response from one of your references for your application to the {{posting__job_detail__job_title}} position with University of Arkansas. The search committee is in the process of reviewing applicants and you will be notified if selected for further consideration.

Thank You.

Human Resources
222 Administration
Phone: 479-575-5351
Fax: 479-575-6971
<https://askhr.uark.edu>

Reference Confirmation to Applicant This email will be sent automatically to the applicant when a reference has been received.

Subject: Thank you for submitting a recommendation



Dear {{reference_request__reference_requests__name}},

We have received your reference for a candidate who has applied for the {{posting__job_detail__job_title}} position at University of Arkansas. Thank you for completing this information. We can now continue with the review of this candidate, incorporating the valuable information provided!

Thank you.

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