Enhancements to reference request templates

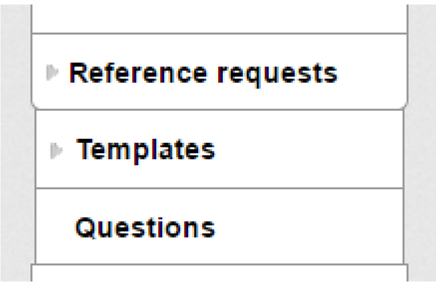
Summary

Following feedback, we have made a number of enhancements to the way reference templates work and the options available.

What is changing?

For System Administrators

Under the **Admin** tab, the **References** section now has two sub-menus: **Templates** and **Questions**.



Questions are now created independently of templates and can be used in one or more templates. You can have up to 200 questions and 12 templates.

The **Templates** sub menu now enables you to create up to 12 templates to be used by your organisation. These templates are built up using questions created in the **Questions** sub-menu which can then be used in one or more templates.

Adding questions

There are now six different types of question that can be created (see below):

- Short free text (128 characters)
- Long free text (1000 characters)
- Single select
- Multiple select
- Short date (mm/yyyy)
- Long date (dd/mm/yyyy)

You are able to create up to 200 questions for your organisation.

When creating a new question, you will have to add it to a question group. The advice is to use **General** if none of the others apply.

There are five question groups:

- General
- Academic
- Employer
- Professional
- Personal referee

Note: the question groups just help to organise your questions, you can use a question from any group in any of your templates and you can use the same question in multiple templates.

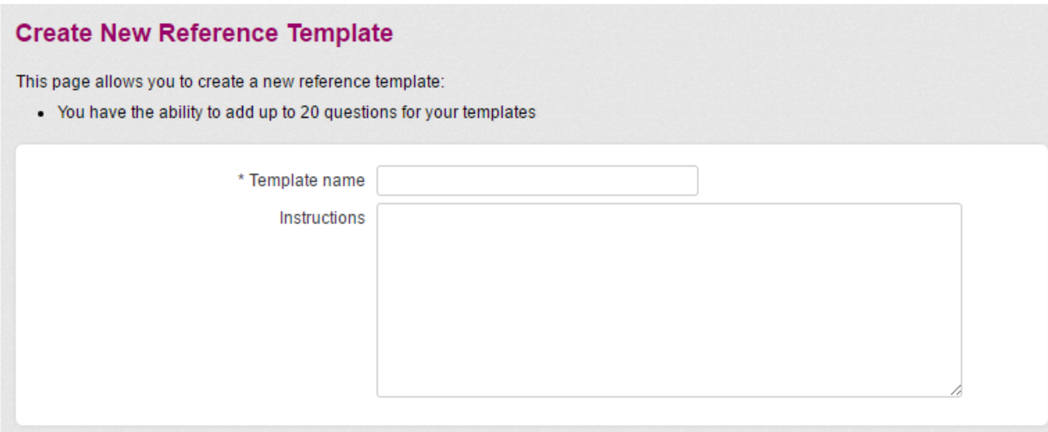
Example questions might include:

[Short text]	What was the candidate's position in your organisation?
[Long text]	Please give details of any concerns or areas for development in their area of work?
[Single select]	What is your relationship to the candidate? Line manager / colleague / personal
[Short date]	When did the candidate start work with you?
[Single select]	Would you recommend the candidate? Yes / Yes with reservation/ No / No comment
[Multiple select]	What were the candidate's responsibilities? Financial management / project management / team management / incident management / problem management

Creating new templates

You can create up to 10 templates per organisation. These templates can use any of the questions available in the 'Questions' section.

After you select 'Create a new template' you will get presented with a screen (see below) which will ask you for a template name and instructions for the referee.



Below this you can then select the questions you wish to include in the template (see below).

General

Question	Answer type	Select Question
General Comments	Long free text	
What is your relationship to the candidate?	Single select	
What was the candidate's position?	Short free text (128 characters)	

Academic

Question	Answer type	Select Question
What is your position?	Short free text	
Would you recommend the candidate for this role?	Long free text	
When did the candidate start their course?	Date (DD/MM/YYYY)	
When did/are they expected to qualify?	Date (MM/YYYY)	

Employer

Question	Answer type	Select Question
Employer Long Free Text	Long free text	
Employer Long Free Text #2	Long free text	

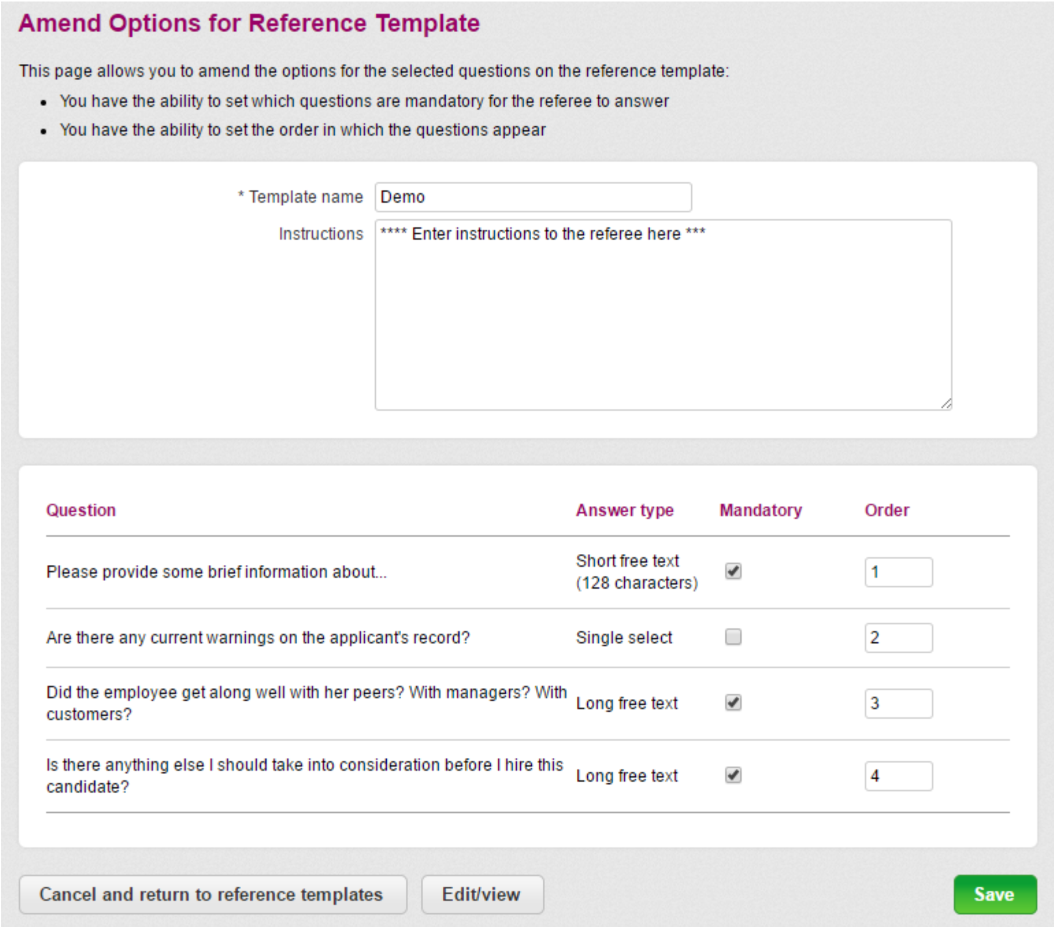
Once you have entered a template name and selected the questions you wish to include; you will then need to click:

Save and amend options

This will give you the option to decide:

1. Which questions are mandatory i.e. the referee will have to provide an answer or they will not be able to submit a reference, and
2. The order of the questions chosen.

See below:



Amend Options for Reference Template

This page allows you to amend the options for the selected questions on the reference template:

- You have the ability to set which questions are mandatory for the referee to answer
- You have the ability to set the order in which the questions appear

* Template name: Demo

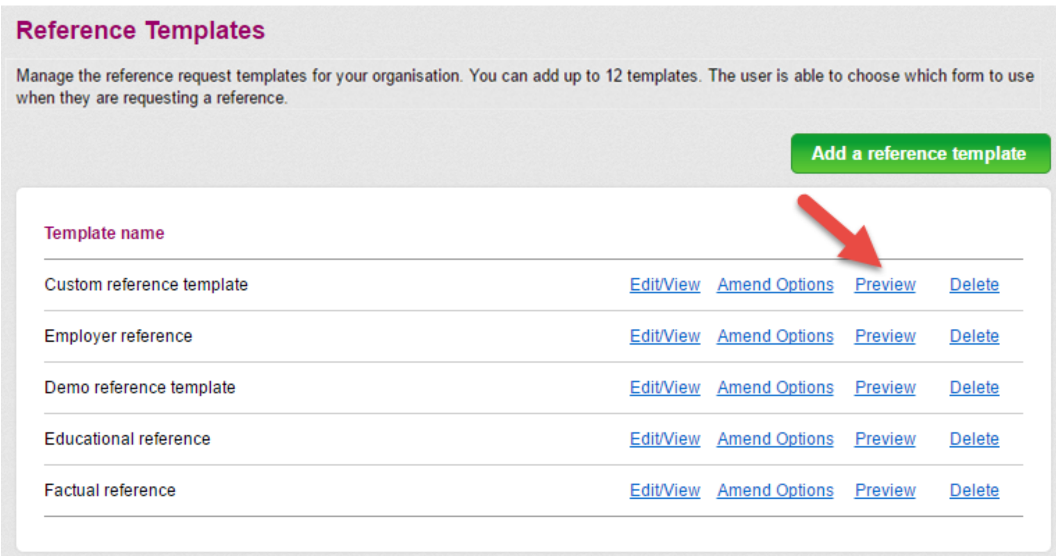
Instructions: **** Enter instructions to the referee here ***

Question	Answer type	Mandatory	Order
Please provide some brief information about...	Short free text (128 characters)	✔	1
Are there any current warnings on the applicant's record?	Single select	☐	2
Did the employee get along well with her peers? With managers? With customers?	Long free text	✔	3
Is there anything else I should take into consideration before I hire this candidate?	Long free text	✔	4

Cancel and return to reference templates | Edit/view | Save

Once this is done clicking ‘Save’ will mean that the template is ready for use or you can ‘Edit/View’ to make further amendments if required.

It is recommended that you use ‘Preview’ to check the reference to make sure that you have included all the questions required and that they make sense (see below).



Reference Templates

Manage the reference request templates for your organisation. You can add up to 12 templates. The user is able to choose which form to use when they are requesting a reference.

Add a reference template

Template name				
Custom reference template	Edit/View	Amend Options	Preview	Delete
Employer reference	Edit/View	Amend Options	Preview	Delete
Demo reference template	Edit/View	Amend Options	Preview	Delete
Educational reference	Edit/View	Amend Options	Preview	Delete
Factual reference	Edit/View	Amend Options	Preview	Delete

The **Preview** will display the questions selected for that template so that you can check everything is satisfactory.

Questions For Template: Educational reference

Questions in red with an asterisk at the end will be mandatory for the referee to answer.

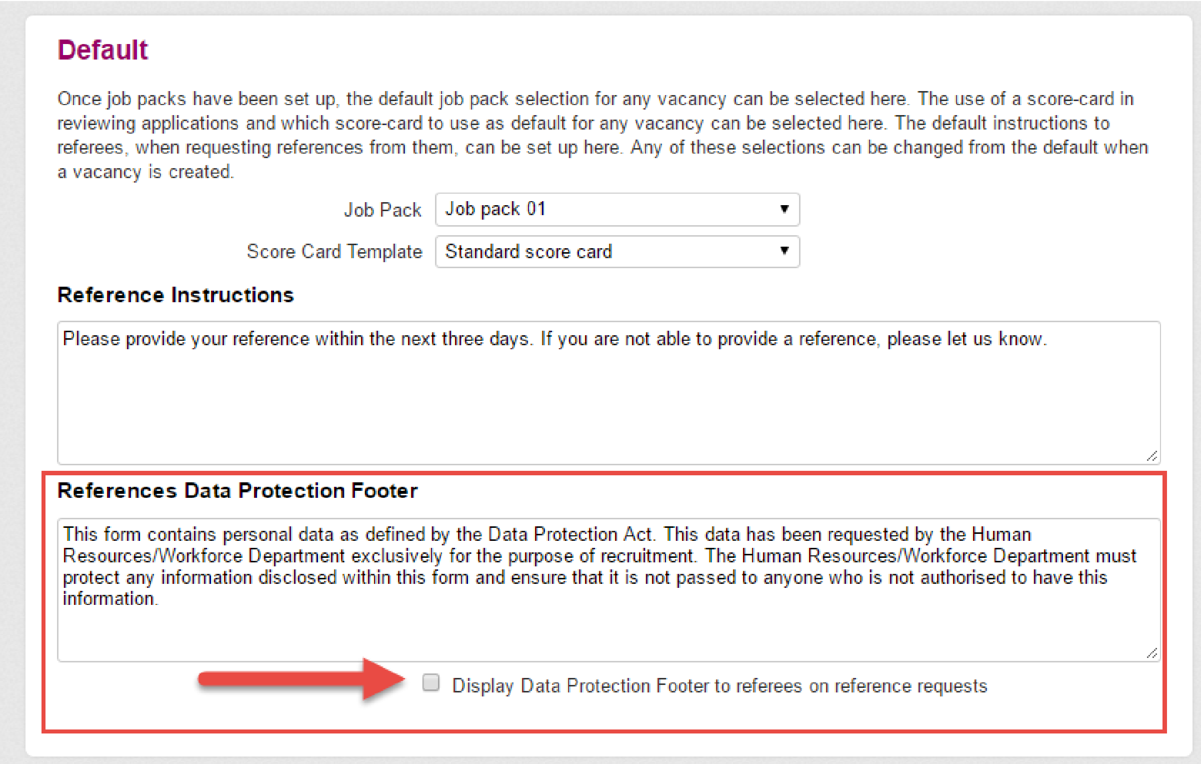
Order	Question Text	Answer Type
1	Please provide some brief information about... *	Short free text (128 characters)
2	Please provide some detailed information about.... *	Long free text
3	Would you recommend this employee for this post? * • Yes, without reservation • Yes, but would require development in some areas • No • Would prefer not to comment	Single select

A red asterisk (*) next to a question indicates that that question has been marked as mandatory.

Once these steps are completed the reference template will be available to use.

New Data Protection Footer

As well as the features above, there is now the ability to add a data protection footer to reference requests (see below). This is accessed in the **Default** section on the **Admin** tab.



Default

Once job packs have been set up, the default job pack selection for any vacancy can be selected here. The use of a score-card in reviewing applications and which score-card to use as default for any vacancy can be selected here. The default instructions to referees, when requesting references from them, can be set up here. Any of these selections can be changed from the default when a vacancy is created.

Job Pack: Job pack 01

Score Card Template: Standard score card

Reference Instructions

Please provide your reference within the next three days. If you are not able to provide a reference, please let us know.

References Data Protection Footer

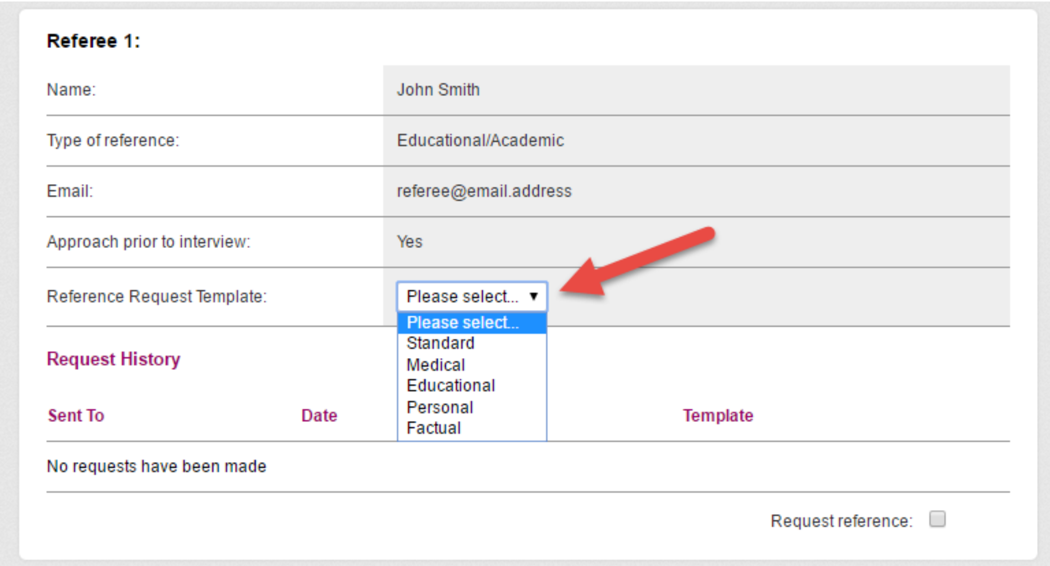
This form contains personal data as defined by the Data Protection Act. This data has been requested by the Human Resources/Workforce Department exclusively for the purpose of recruitment. The Human Resources/Workforce Department must protect any information disclosed within this form and ensure that it is not passed to anyone who is not authorised to have this information.

Display Data Protection Footer to referees on reference requests

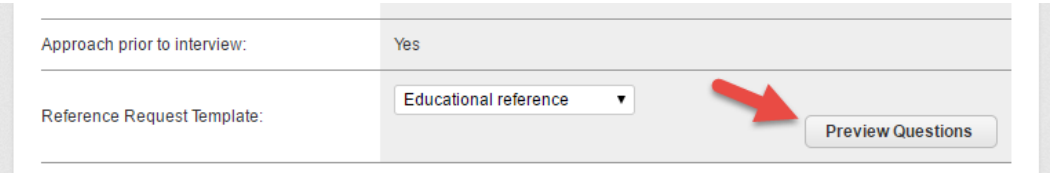
Note: default text is included, but this can be amended as required to suit your organisational requirements. You will need to check the box underneath (indicated by the red arrow above) to enable this feature.

For the Vacancy Team

When requesting a reference you will get the option to select which of the current reference templates is appropriate for that vacancy and referee (see below).



If you wish to check the questions that have been used before requesting the reference, then there is the ability to preview the questions on the template before they are sent (see below).



FAQs

What differences will referees see?

The new features will be transparent to referees and they will continue to fill in references as they do now.

What will happen to my existing templates?

Existing templates will be migrated: an organisation's standard template and the medical template will both be created as templates in the new systems and can continue to be used.

Note: both templates will be available in all types of vacancy, so it will be important to make sure that the correct template is selected.

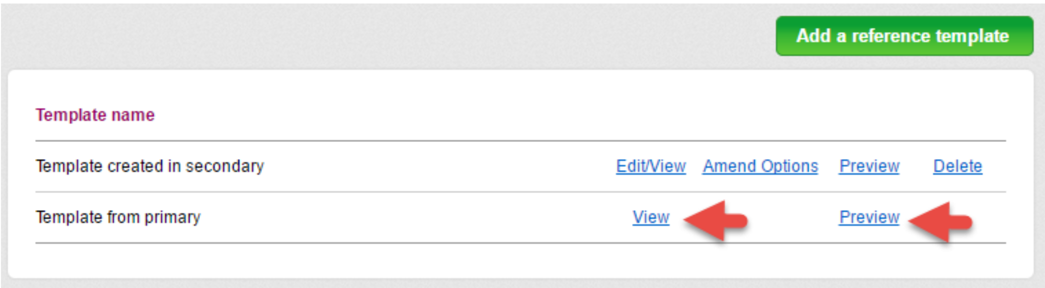
What will happen to requests that are currently pending?

Requests that have been sent to referees will continue to work as they do now.

How will this work if I have secondary accounts?

The secondary agency can use the questions and templates that are available to the primary organisation and, in addition, it can create its own questions and templates.

In the screenshot from a secondary agency, (see below), you can see that the secondary agency can amend/delete its own templates (and questions) but can only view those inherited from the primary.



When will this happen?

This change will be implemented on the 6th of June 2017.