

Reference Letter Tool Job Aid (Faculty)

Purpose: The purpose of this Job Aid 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	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.
Recommendation Workflow	Nothing should be selected here as we do not want applicants to be moved to a different status once the referee has responded.
Recommendation Document Type	The Reference Letter option should always be selected if you are using references for your position

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- When updating the Position Details, please remember to update your Application Instructions so the applicant knows when their referee will be notified. Here is an example of how those instructions should be written:

Additionally as part of our application process, we are requesting a minimum of X but not more than X letters of reference. Please provide the names and email addresses for your references in the Reference Letter section of the employment application. Upon submission of your application, an automated email will be generated and sent to your references with instructions on how to attach the reference letter to your application through a confidential on-line portal.

- 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 Letters Section within Posting	
Accept References	By selecting Yes, the posting's application form will have a reference letter 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 choices.
Cutoff Date	This feature is not currently used by ISU
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.

- Continue the workflow process and route the posting for approval based on your organizational structure. When the posting is on the ISU Jobs website, 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 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.
- The **applicant tab** will be updated with the information and is available for review. See **Viewing Reference's Recommendation** for more details.

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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 designed applicant workflow state, an automated email will be generated to the reference. In the email, the reference will be provided with a link to follow. There is also a link to the posting, which is only accessible if the posting is not closed/filled. If the posting is closed, be sure to include information on the posting's Reference Letter section titled **Provider Instructions**.
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. 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** on People Admin and click on **Applicants**. Click the appropriate **Applicant's** last name.
2. While viewing the **Applicant** information you will see three tabs: **Summary**, **Recommendations** followed by 2 numbers (for example 1 of 1), and **History**. Click the **Recommendations** tab.

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3. You will see **Reference Requests** if an email has been sent out to a reference but either they have not yet responded or there was an issue sending an email. Below **Reference Requests** is where you will see completed **Recommendations**.

Please Note: *If a user is logged in as a Guest User will not have access to the Recommendations tab, instead, they will view the Reference Letter by scrolling all the way to the end of the applicant's application.*

INDEX: Automated Emails

In this section you will see the different emails that can be sent out to the Reference. These can be sent when the candidate reaches a certain workflow state, if a Reference hasn't responded with recommendations, etc.

Request to Reference for Recommendation

This email is sent to the reference requesting them to submit a recommendation for the applicant:

Dear {{reference_request__name}},

{{application__applicant_detail-user__first_name}} {{application__applicant_detail-user__last_name}} has applied for the position of {{posting__job_detail_job_title}} with {{posting__organizational_unit}} at Iowa State University. The candidate has listed you as a provider of a letter of recommendation.

To learn about this position, please visit: {{posting__applicant_site_quick_link_url}}.
Special Instructions from hiring department: {{posting__provider_special_instructions}} Thank you in advance for your assistance in this process.

Instructions for submitting your letter of recommendation:

- 1) Please visit the {{reference_request__url}} reference portal. If you are unable to select this link, please copy and paste the following link, with no spaces, into your browser address bar: {{reference_request__url}}
- 2) On the recommendation submission webpage, enter your name, organization, email and how you know the candidate.
- 3) Select Next at the bottom of the page.
- 4) On the following page, select Add Recommendation Letter (red text) and upload your document. The system will then automatically convert your document to PDF. This may take a few minutes.
- 5) Select Next and finalize.

If you have any questions regarding this reference request or the electronic process for submitting

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the reference, please contact University Human Resources at 515-294-4800 or employment@iastate.edu.

Sincerely,
University Human Resources
Iowa State University

Reference Confirmation (Applicant)

Once the reference has completed the recommendation, the following email will be sent out to the candidate:

Dear (Applicant First Name/Last Name)

This is to inform you that we have received a response from one of your references for your application to the (position title/Dept.) position with Iowa State University. The search committee is in the process of reviewing applicants and you will be notified if selected for further consideration.

Thank you,
University Human Resources
Iowa State University

Reference Confirmation (Reference)

Dear {{application__applicant_detail-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 Iowa State University. The search committee is in the process of reviewing all application materials, and you will be notified if selected for further consideration.

Thank you,
University Human Resources
Iowa State University