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**Introduction**

This is a step-by-step guide for Adding, Updating, Resending, & Archiving References within the CHRS Recruiting system.

## Adding, Updating, Resending, & Archiving References

This will show you how an applicant or an administrator can update or archive an applicant's referee. It will also show how to resend an invitation to a referee if using the "Letter of Recommendation Initiated (automatic)" status.

*Note: Applicants can only update references if they are in the "Incomplete" or "New Application" statuses. During any other status, only administrators can make updates.*

### Applicant Process to Update Referee List

#### Update References

1. Applicant logs into the Careers website ([Applicant Portal](#))
2. Applicant clicks the "Update references" button (A)
3. Applicant can update any reference information (B)
4. Applicant can click on "Add more" to add more referees (C)
5. Applicant clicks "Submit" to save their changes (D)

*Note: Applicants can only update references if they are in the "Incomplete" or "New Application" statuses.*

#### Incomplete applications

You have no incomplete applications.

#### Submitted applications

▶ TEST - Faculty PT Pool (Julia's Test Job) (497139)

San Jose

Application submitted 14 Sep 2020 at 1:57pm PST.

Current status: Application Received

View application

Update references

Update your application

Withdraw

You are controlling Baby Yoda's applicant account.

#### Update references

##### Referee 1

First name:\*

Last name:\*

Organization:\*

Type of reference:\*

Position Title:\*

Phone Number:\*

E-mail:\*

##### Referee 2

First name:\*

Last name:\*

Organization:\*

Type of reference:\*

Position Title:\*

Phone Number:\*

E-mail:\*

##### Referee 3

Add more

Submit

Cancel

Administrator Process to Update Referee List

**Adding a reference**

1. Open the applicant card and click the box with three dots (A) where the job information displays
2. Click "View references" (B)
3. Click "New" (C) when the page displays
4. The referee page displays (D). Add new referee details
5. Click "Submit" to save changes

**Baby Yoda** View profile Add flags Actions

Address: 123 Main St, Anytown, California 95123, United States | Phone: +1 1234567890

E-mail: sjsu.hrtest+BYo-test@gmail.com | Applicant No: 58663

Employment status: Never Employed at CSU | Original source: Radio

e-Zines comms hold:  No

**Applications** | History | Scheduled emails | CRM | Resume / CV

**497139 - TEST - Faculty PT Pool (Julia's Test job)**

Date submitted: Sep 14, 2020 | Applied via: Radio | Status changed Jun 28, 2021: New Application | Other: No o

Resume / CV: View | Form: View | Add flags

Communicate  
 Compile and send  
 New booking to an existing event  
 New booking to a new event  
 New task/reminder  
 New form  
 New referral  
 Send application  
 Send application and change  
**View references** (B)  
 Undiscover application

**Manage references**

New **C**

Job: TEST - Faculty PT Pool (Julia's Test job) (497139)

Status: Active Clear Search

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Position Title	Phone Number	E-mail	Length of Tenure
Luke	Skywalker	Employer	-			Test Place	Tester	408-111-0000	sjsu.hrtest+Lskyuat@gmail.com	
Han	Solo	Manager/Supervisor	-			Test Place	Tester	408-111-0001	sjsu.hrtest+HSolouat@gmail.com	
R2D2	Droid	Professional	-			Test Place	Tester	408-111-0002	sjsu.hrtest+R2D2uat@gmail.com	

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**Add: Referee** **D**

First name:\*

Last name:\*

Organization:\*

Type of reference:\*

Position Title:\*

Phone Number:\*

E-mail:\*

Submit Cancel

**Editing a reference**

1. Open applicant card and click the box with three dots (A) where the job information displays
2. Click "View references" (B)
3. Click "Edit" (C) when the page displays
4. The referee page displays (D)
5. Update referee details
6. Click "Submit" to save changes

**Baby Yoda** View profile Add flags

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E-mail: sjsu.hrtest+BYo-test@gmail.com | Applicant No: 58663

Employment status: Never Employed at CSU | Original source: Radio

e-Zines comms hold:  No

**Applications** | History | Scheduled emails | CRM | Resume / CV

**497139 - TEST - Faculty PT Pool (Julia's Test job)**

Date submitted: Sep 14, 2020 | Applied via: Radio | Status changed: Jun 28, 2021 | Offer: No offer

Resume / CV: View | Form: View | Add flags

- Communicate
- Compile and send
- New booking to an existing event
- New booking to a new event
- New task/reminder
- New form
- New referral
- Send application
- Send application and change
- View references**
- Undiscover application

**Manage references**

New | Send invitations

Job: TEST - Faculty PT Pool (Julia's Test job) (497139)

Status: Active

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Position Title	Phone Number	E-mail	Length of Tenure	
Luke	Skywalker	Employer	-			Test Place	Tester	408-111-0000	sjsu.hrtest+LSkyuat@gmail.com		Edit
Han	Solo	Manager/Supervisor	-			Test Place	Tester	408-111-0001	sjsu.hrtest+HSolouat@gmail.com		Edit   Send   Archive
R2D2	Droid	Professional	-			Test Place	Tester	408-111-0002	sjsu.hrtest+R2D2uat@gmail.com		Edit   Send   Archive

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**Edit: Referee**

First name:\* Luke

Last name:\* Skywalker

Organization:\* Test Place

Type of reference:\* Employer

Position Title:\* Tester

Phone Number:\* 408-111-0000

E-mail:\* sjsu.hrtest+LSkyuat@gmail.com

**Resending an invitation to a reference**

1. Open applicant card and click the box with three dots (A) where the job information displays
2. Click "View references" (B)
3. Click "Resend" (C) when the page displays
4. The send page displays. Select the Online reference check form titled "SJ-Faculty Letter of Recommendation Form" (D)
5. Enter the number of expiry days (E). This must be a number, not a date
6. Do not change the "E-mail from" value (F).
7. Do not change the body of the email (G). All details in the {} will automatically populate with information upon send.
8. Click "Send"

**Baby Yoda** View profile Add flags

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E-mail: sjsu.hrtest+BYo-test@gmail.com | Applicant No: 58663

Employment status: Never Employed at CSU | Original source: Radio

e-Zines comms hold:  No

**Applications** | History | Scheduled emails | CRM | Resume / CV

**497139 - TEST - Faculty PT Pool (Julia's Test job)**

Date submitted: Sep 14, 2020 | Applied via: Radio | Status changed: Jun 28, 2021 | Offer: No offer

Resume / CV: View | Form: View | Add flags

**Manage references**

Job: TEST - Faculty PT Pool (Julia's Test job) (497139)

Status: Active | Clear | Search

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Position Title	Phone Number	E-mail	Length of Tenure
Luke	Skywalker	Employer	Invited	Nov 23, 2021		Test Place	Tester	408-111-0000	sjsu.hrtest+LSkyuat@gmail.com	View answers   Edit   Control   Resend   Archive
Han	Solo	Manager/Supervisor	Invited	Nov 23, 2021		Test Place	Tester	408-111-0001	sjsu.hrtest+HSolouat@gmail.com	View answers   Edit   Control   Resend   Archive
R2D2	Droid	Professional	Invited	Nov 23, 2021		Test Place	Tester	408-111-0002	sjsu.hrtest+R2D2uat@gmail.com	View answers   Edit   Control   Resend   Archive

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**Send**

Online reference check form\*: SJ-Faculty Letter of Recommendation Form (D)

Expiry Days\*: 20 (E)

E-mail from\*: noreply@calstate.edu (F)

E-mail subject\*: Reference for (FIRSTNAME) (LASTNAME) (G)

E-mail body\*:   
 Merge fields  
 Hi (REFEREEFIRSTNAME) (REFEREELASTNAME),  
 (FIRSTNAME) (LASTNAME) is a candidate for the (JOBTITLE) position at the (BRAND) campus of our California State University system and has identified you as a reference. Please provide your reference as soon as possible so that we may give the candidate due consideration for this role.  
 Click the following link for specific instructions and to provide the reference:  
 (REFERENCECHECKURL)  
 Please be advised that the link above will expire on (REFERENCECHECKEXPIRY).  
 Please do not reference contacts that have been identified as references.

Drag & Drop files here  
 Or click to browse from local drive.  
 SMB file size limit

Send | Cancel (H)

**Administrator update to Archiving a reference**

1. Open applicant card and click on the box with three dots (A) where the job information displays
2. Click "View references" (B)
3. Click "Archive" (C) when the page displays. The archived referee will no longer be viewable on the page
4. To unarchive a referee, in the status box, select "Archived" (D) from dropdown list then "Search" (E)
5. Click "Unarchive" (F) if needed

**Baby Yoda** View profile Add flags

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**Applications** | History | Scheduled emails | CRM | Resume / CV

**497139 - TEST - Faculty PT Pool (Julia's Test job)**

Date submitted: Sep 14, 2020 | Applied via: Radio | Status changed: Jun 28, 2021 | Offer: No offer

Resume / CV: View | Form: View | Add flags

Communicate | Compile and send | New booking to an existing event | New booking to a new event | New task/reminder | New form | New referral | Send application | Send application and change | **View references** | Undisclose application

**Manage references**

New | Send invitations

Job: TEST - Faculty PT Pool (Julia's Test job) (497139)

Status: Active | Clear | Search

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Position Title	Phone Number	E-mail	Length of Tenure
Luke	Skywalker	Employer	-			Test Place	Tester	408-111-0000	sjsu.hrtest+LSkyuat@gmail.com	Edit   Send   Archive
Han	Solo	Manager/Supervisor	-			Test Place	Tester	408-111-0001	sjsu.hrtest+HSolouat@gmail.com	Edit   Send   Archive
R2D2	Droid	Professional	-			Test Place	Tester	408-111-0002	sjsu.hrtest+R2D2uat@gmail.com	Edit   Send   Archive

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**Manage references**

New | Send invitations

Job: TEST - Faculty PT Pool (Julia's Test job) (497139)

Status: Active | **Archived** | Clear | Search

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Position Title	Phone Number	E-mail	Length of Tenure
Luke	Skywalker	Employer	Invited	Nov 23, 2021		Test Place	Tester	408-111-0000	sjsu.hrtest+LSkyuat@gmail.com	View answers   Edit   Control   Resend   Archive
Han	Solo	Manager/Supervisor	Invited	Nov 23, 2021		Test Place	Tester	408-111-0001	sjsu.hrtest+HSolouat@gmail.com	View answers   Edit   Control   Resend   Archive

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**Manage references**

New | Send invitations

Job: TEST - Faculty PT Pool (Julia's Test job) (497139)

Status: Archived | Clear | Search

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Position Title	Phone Number	E-mail	Length of Tenure
R2D2	Droid	Professional	Invited	Nov 23, 2021		Test Place	Tester	408-111-0002	sjsu.hrtest+R2D2uat@gmail.com	View answers   Edit   Control   Resend   Unarchive

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## **Viewing References from the applicant card**

This will show you how to view references and letters of recommendation from the applicant card.

There are two ways to collect letters of recommendation:

1. Collecting references/letters of recommendation outside of CHRS Recruiting.
  - a. If you collect reference information or letters of recommendation outside of CHRS recruiting using the step "Letter of Recommendation Initiated (Manual)", you can use the reference list to contact your applicant's referees.
  
2. Collecting references/letters of recommendation within of CHRS Recruiting
  - a. If you use CHRS recruiting step "Letter of Recommendation Initiated (automatic)", you will be able to view referee answers to Reference Check details as well as an uploaded letters of recommendation. The Reference Check details can also be used in lieu of a missing signature for a letter of recommendation as long as it is selected during the bulk compile process.

**Viewing References:**

1. Open applicant card and click the box with three dots (A) where the job information displays
2. Click "View references" (B). A pop-up box will display with reference information. You use this reference if collecting references or letter outside of the system.
3. If using the "Letter of Recommendation status (automatic)" step, you will be able to view the status (C). If status shows "Completed", click "View answers" (D).
4. You will be able to see the Reference Check Details collected from the referees (E) along with their letters of recommendation (F).

*Note: During the bulk compile process, if you use the "Letter of Recommendation status (automatic)" step, you can bulk compile the Reference Check details and it will count as a signature if the signature on the letter of recommendation is missing. This is done by selecting the checkbox "Completed online reference check form" during the bulk compile process.*

The screenshot displays the system interface for managing references. At the top, the applicant's profile for 'Baby Yoda' is shown with contact information and application status. Below this, a list of references is provided for the job '497139 - TEST - Faculty PT Pool (Julia's Test job)'. The table lists three references: Luke Skywalker, Han Solo, and R2D2, with their respective status, expiry dates, and scores. The 'View answers' link for the first reference is highlighted with a callout 'D'. Below the table, the 'Reference check details' for the first reference are shown, including contact information and a section for the letter of recommendation, which is highlighted with a callout 'F'. A callout 'A' points to the three-dot menu on the applicant card, and a callout 'B' points to the 'View references' link in the pop-up menu. A callout 'C' points to the status dropdown menu in the reference table.