ADMINISTERING REFERENCE CHECKS

In partnership with Referoo, WorkPro leverages the technological expertise of Referoo to deliver an integrated service within the WorkPro platform.

PART 1 - ESTABLISHING YOUR WORKPRO ACCOUNT WITH REFEROO

Once your account is established within Referoo, you are free to start using the service.

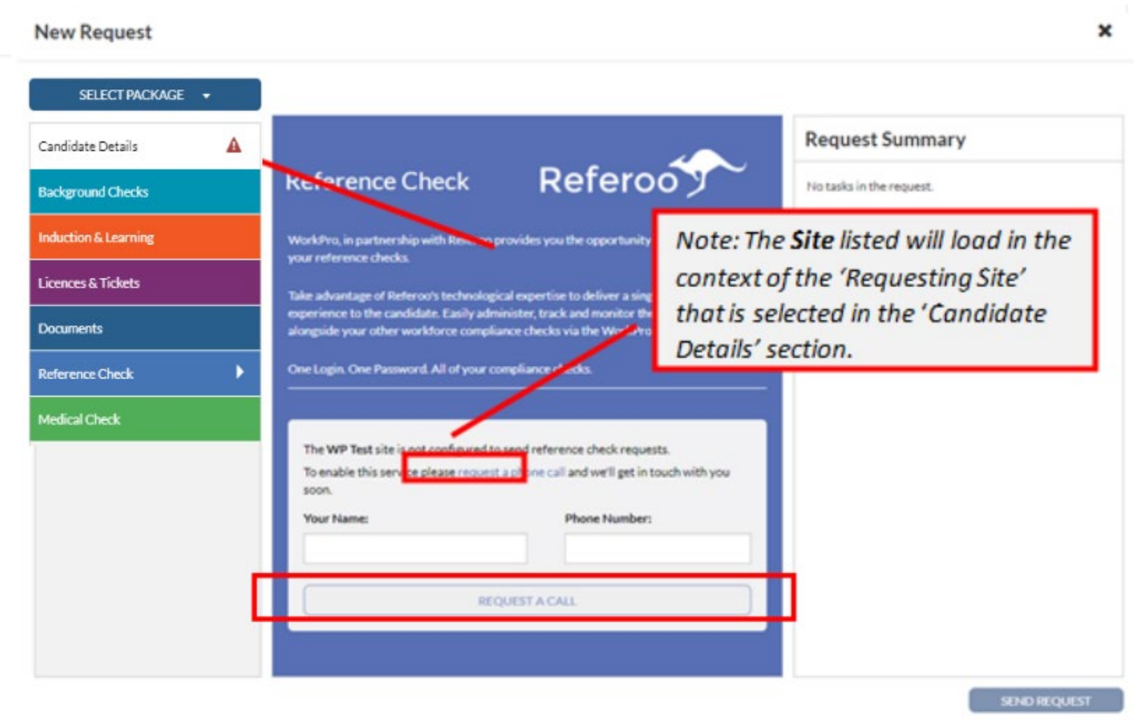
Note: If you have already done this, hop, skip and jump to Part 2 – Sending a Reference Check)

To enable the Reference Check service, you will require:

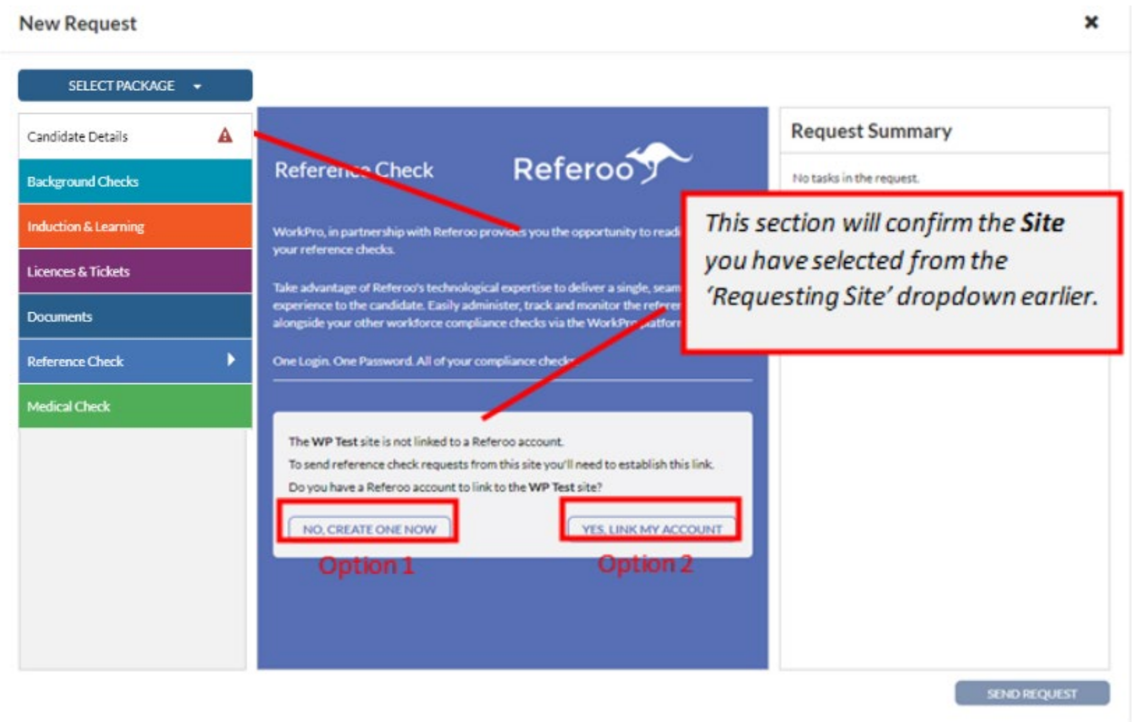
1) A Referoo account
    - can be a new account created specifically for the integration
    - can be an existing account
    - can be linked to exactly **one** WorkPro site.
2) A Usage Agreement within WorkPro for the Reference Check service

This is a simple one-time setup to ensure you can continue to enjoy your Reference Check service!

- Log in to WorkPro as an Administrator and select **'**+Request'
- Select 'Reference Check' from the **New Request** screen and 'request a phone call'. Once entered, a WorkPro representative who will coordinate a Usage Agreement within WorkPro for the Reference Check service.



- Once your Usage Agreement is active, log back in to WorkPro as an Administrator and select **'**Request'
- Select the site you want to link with a Referoo account from the 'Requesting Site' dropdown in 'Candidate Details' and click on the 'Reference Check' menu item.

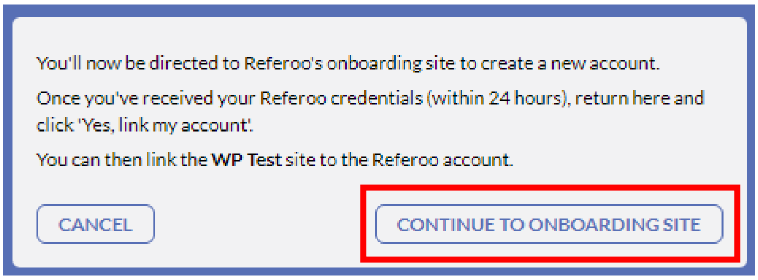


There are 2 different courses of action taken, depending on the status of your Referoo account:

<u>OPTION 1: You do not have a Referoo account</u>

- Select 'No, create one now' where you will be directed to Referoo's onboarding site to create an account upon clicking 'Continue to onboarding site'. Please return to **this step** once you have been provided with your Referoo credentials (this can take up to 24 hours).

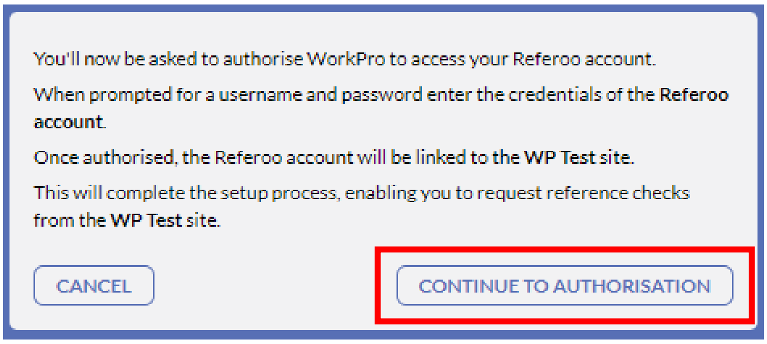
Reminder: this will need to be done for each WorkPro site against your WorkPro account



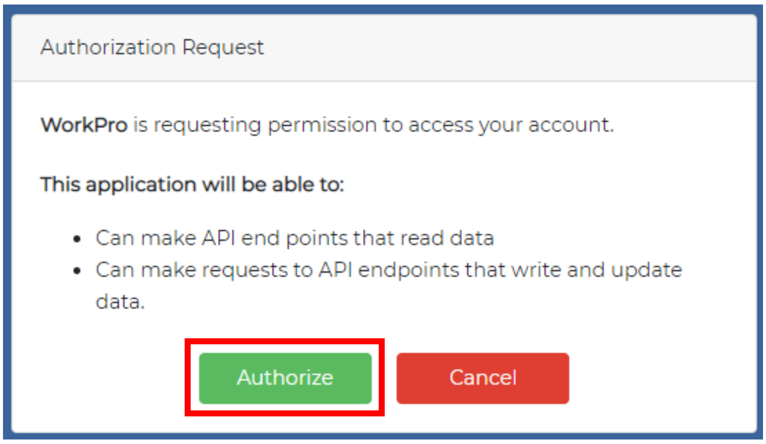
<u>OPTION 2: You have a Referoo account</u>

- Select 'Yes, link my account' if you are an existing Referoo customer, or have signed up through WorkPro and have since been provided with your Referoo credentials. You will be directed to authorise WorkPro to access your Referoo account in a new tab by clicking 'Continue to Authorisation'.

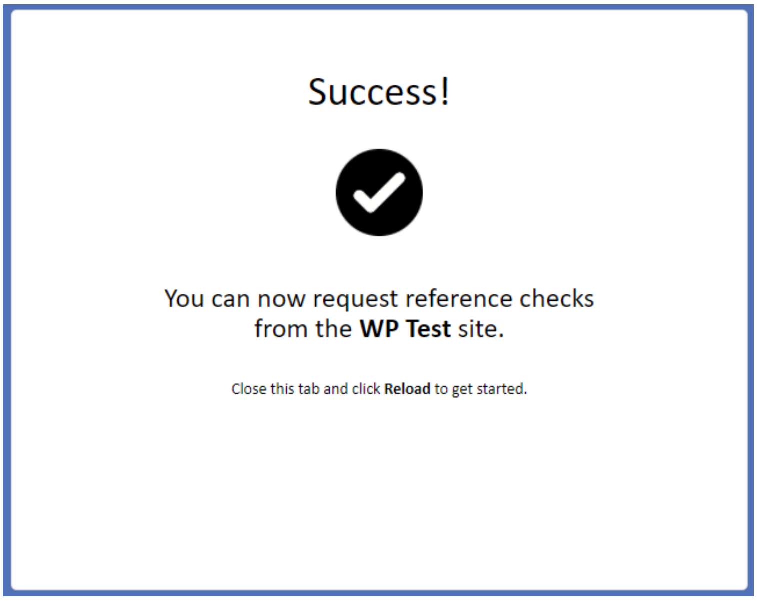
*Reminder: this will need to be done for each WorkPro site against your WorkPro account. This section with again confirm the **Site** you are about to configure.*

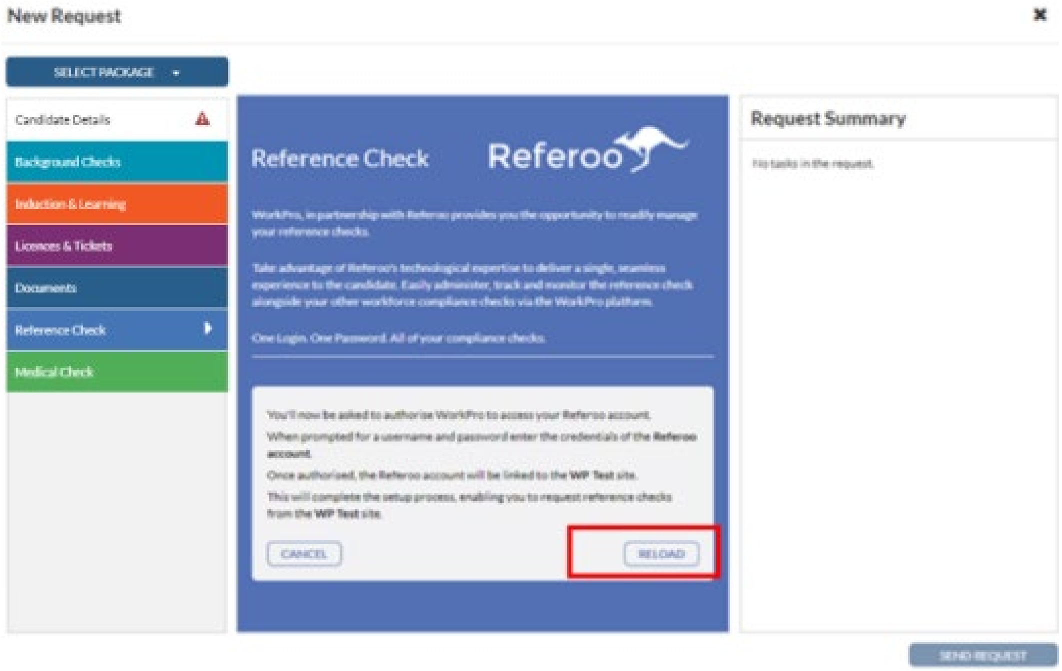


- When prompted, enter the Username and Password for your **Referoo account** and 'Login'
- 'Authorize' WorkPro to integrate with Referoo



- Congratulations! Your WorkPro site has now been linked to your Referoo account when you see the *Success* screen below. Close the Referoo tab and 'Reload' within WorkPro to commence using the service.





PART 2 - SENDING A REFERENCE REQUEST

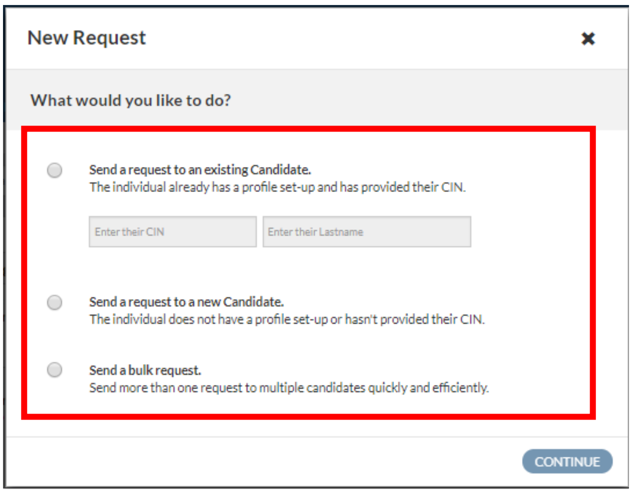
There are a few options to sending references:

1. Sending a single reference request
2. Sending a bulk reference request

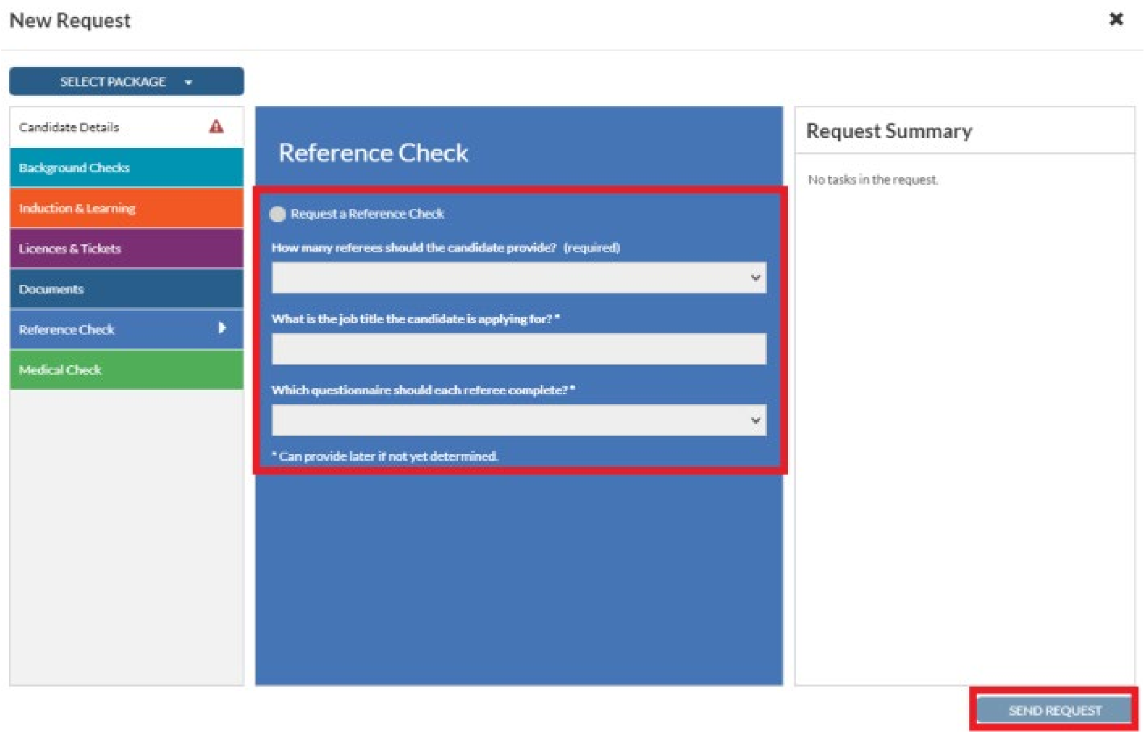
<u>OPTION 1: Sending a request to one candidate</u>

Step 1: Log in to WorkPro as an Administrator and select **‘**Request’

Step 2: Choose the most suitable option, and ‘Continue’



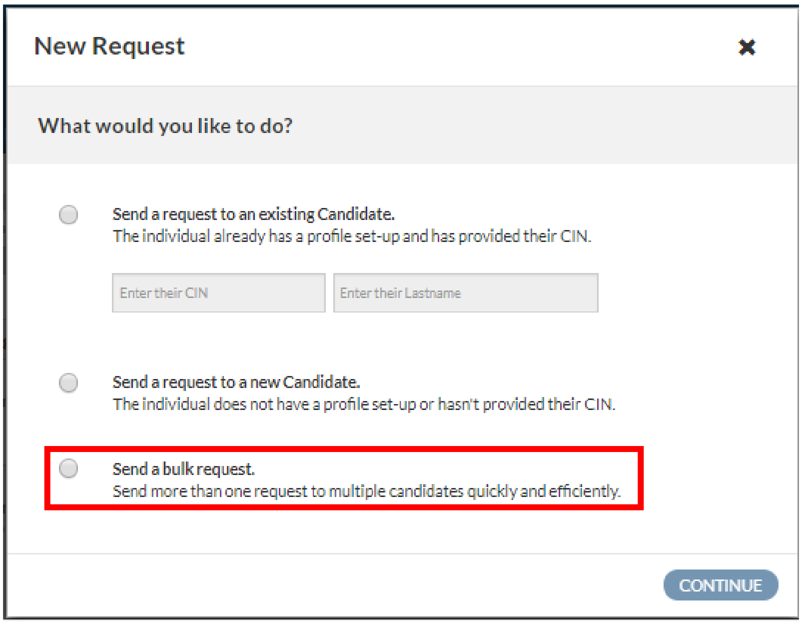
Step 3: Select 'Reference Checks', complete the candidate information and reference check option and 'Send Request'.



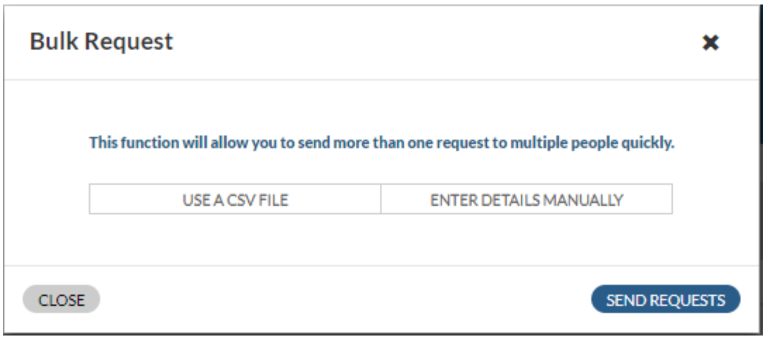
Option 2: Sending a Bulk Request

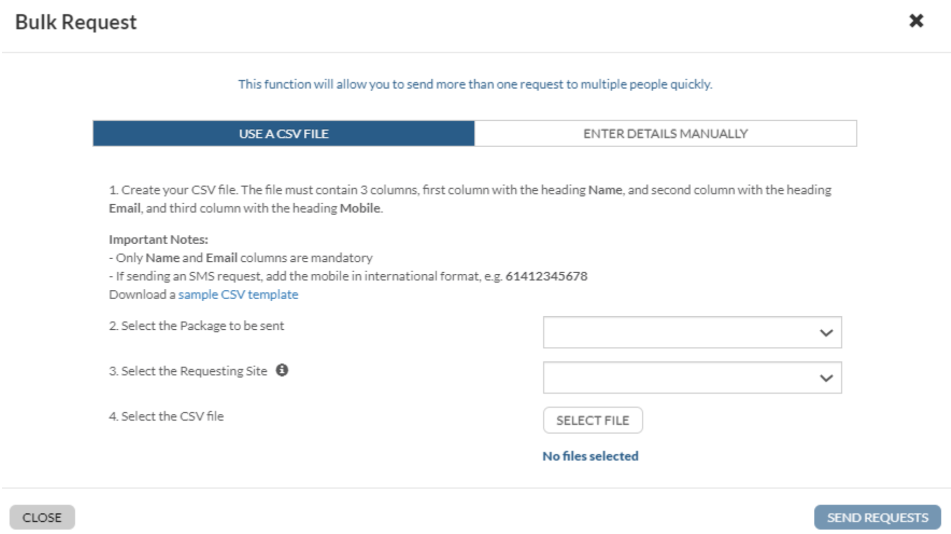
Step 1: To send a request in 'Bulk', a Package will need to be established. This can be done by selecting 'Actions' and 'Packages'. For information relating to Packages, refer to the 'Creating and Managing Packages' User Guide.

Step 2: Once a package is established, select 'Request', and 'Send a bulk request'.



Step 3: Choose whether to 'Use a CSV File' or to 'Enter Details Manually' and complete the action.



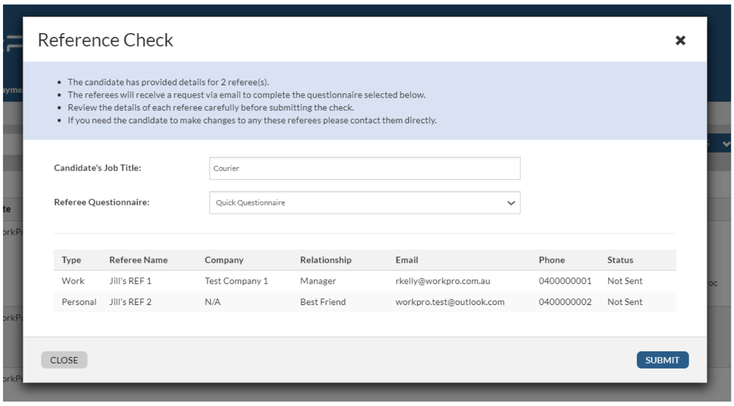


Once the request has been sent to the candidate, they will sign up or login to the platform and complete the requirements:

- Referee Name/s
- Referee Type (work/personal)
- If it is a work reference, Company Name is necessary
- Referee Email Address
- Phone Number

<u>Submitting the Reference Checks to a Referee</u>

Once the candidate has completed their task, the account Administrator will receive an email alert advising that the referee/s information is ready to be viewed/submitted to the referees.

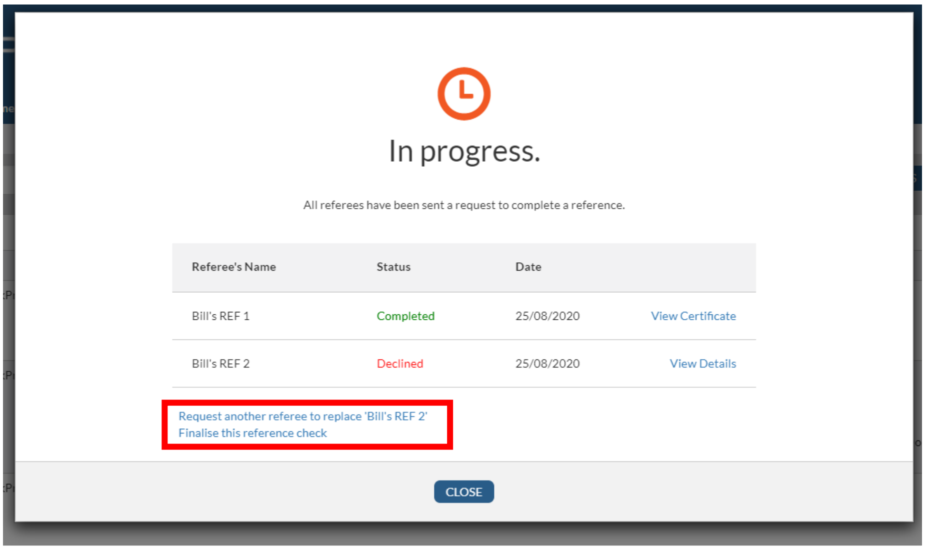


Once the reference is 'submitted', the status within WorkPro will be updated from 'Please Review' to 'In Progress' and the referee/s will receive an email invitation to complete the reference. Auto-alerts are sent to the referee/s at 48 and 72 hours if the reference remains outstanding.

Once a referee has completed their reference, the Account Administrator will receive an automated email advising that a reference has been completed.

If a Referee declines the reference, or the email address provided for the referee bounces, an email alert will be sent, and you can decide to send the candidate a request to upload an alternative referee's details.

Additionally, you have the option to 'Finalise this Reference Check'.



Once the reference is completed, the check status will be updated to 'Finalised' and the Certificate is able to be viewed and/or downloaded.