



HOW TO ADMINISTER REFERENCE CHECKS

WorkPro's enhanced reference check technology allows you to seamlessly request and manage candidate references within the platform, offering a faster and more streamlined experience.

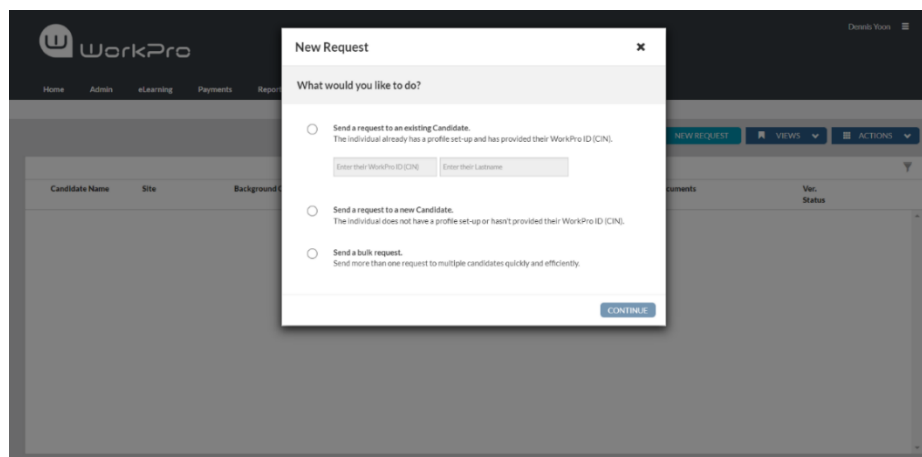
There are two options to send a reference request:

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

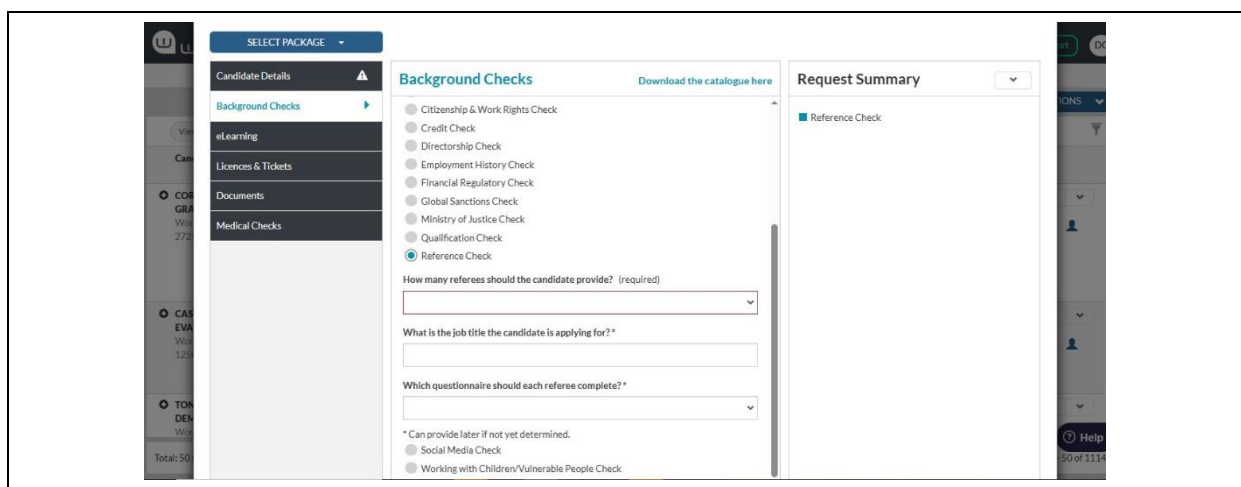
OPTION 1: Sending a request to one candidate

Step 1: Log in to WorkPro as an Administrator and select 'New Request' from the Home dashboard.

Step 2: Choose the most suitable option, and 'Continue'



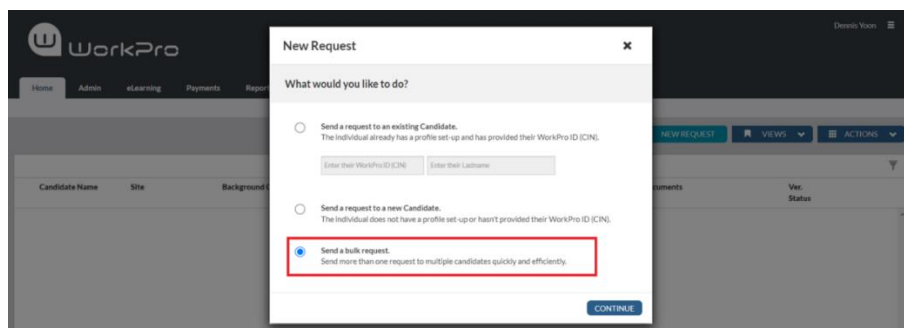
Step 3: Select 'Background Checks' and 'Reference Check' from the list and answer the questions regarding the number of referees the candidate should provide, the relevant job role and select the questionnaire template:



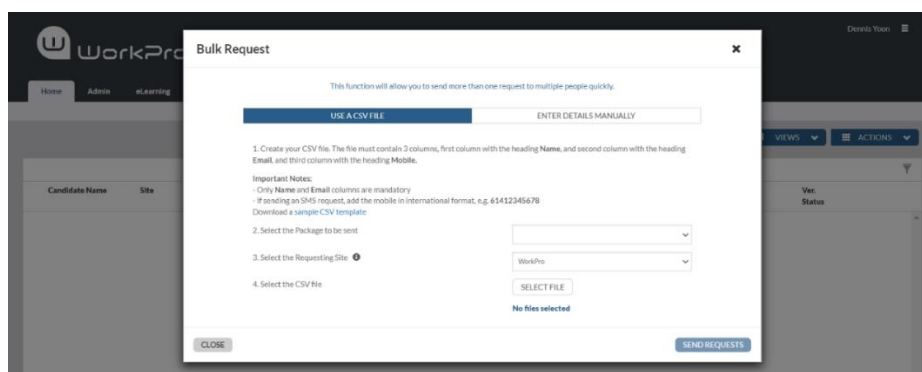
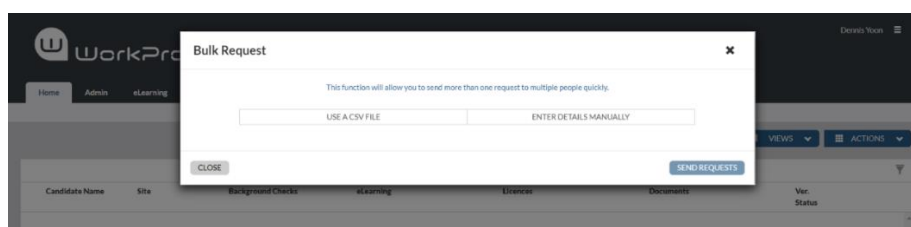
OPTION 2: Sending a Bulk Request

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.

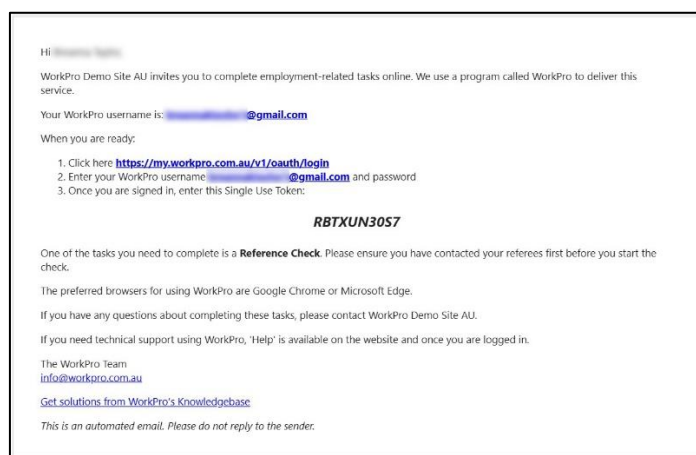
Step 2: Once a package is established, select 'New Request', and 'Send a bulk request'.



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



The candidate will receive a request to submit the reference check application:



They will then either 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

Submitting the Reference Checks to a Referee

Once the candidate has completed their task, depending on your account configuration, you will either receive an email alert advising that the referee/s information is ready to be viewed by you and sent to the referees, or you will receive an email advising that the candidate has sent their invitation to the referee/s, and the dashboard status will update to 'In Progress'.

Reference Check

- The candidate has provided details for 2 referees/s.
- The referees will receive a request via email to complete the questionnaire selected below.
- Review the details of each referee carefully before submitting the check.
- If you need the candidate to make changes to any these referees please contact them directly.

Candidate's Job Title:

Referee Questionnaire:

Type	Referee Name	Company	Relationship	Email	Phone	Status
Work	Jill's REF 1	Test Company 1	Manager	rkelly@workpro.com.au	0400000001	Not Sent
Personal	Jill's REF 2	N/A	Best Friend	workpro.test@outlook.com	0400000002	Not Sent

The referee/s will receive an email invitation to complete the reference, as per the below:

WorkPro

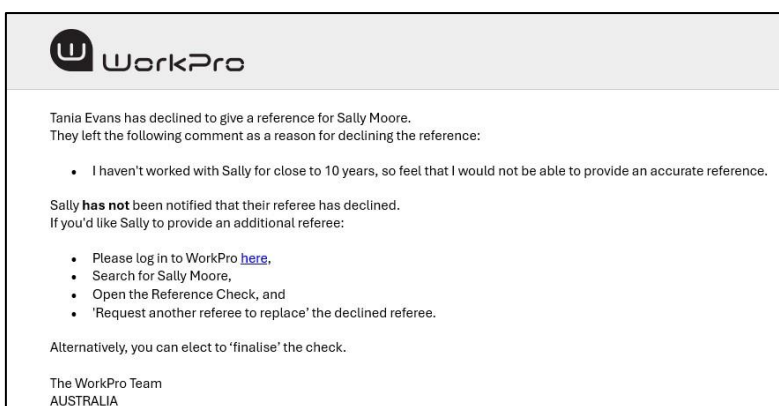
Hi Tania Evans,
Sally Moore has given your name to complete a reference as part of their engagement with WorkPro Demo Site AU.
WorkPro Demo Site AU uses WorkPro to complete this request.
To start the reference, click on the link below.
You can decline to complete the reference by clicking on the link below, and providing a reason. The candidate will not see the decline reason, and WorkPro Demo Site AU can request the candidate to provide an alternative referee.
https://reference.workpro.com.au/referee?num=1377&unique_id=8cf910fa-694d-4fc9-a54b-8ac565bf98da
If you have any questions about completing the reference, please contact WorkPro, using the details included in this email.

The WorkPro Team
AUSTRALIA

Auto-reminders are sent to the referee/s at 48 and 72 hours if the reference remains outstanding.

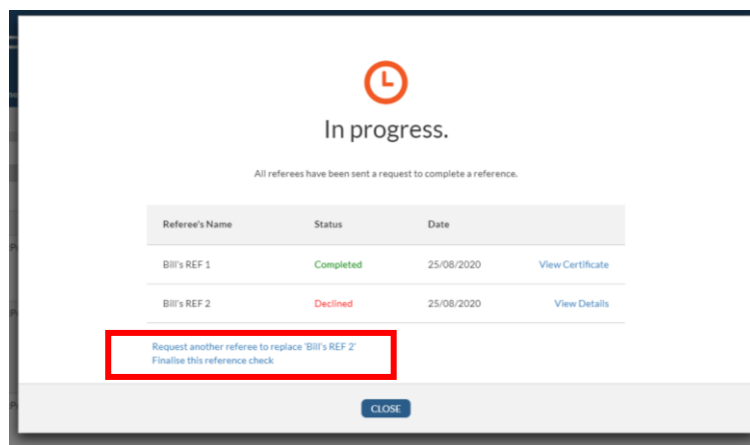
Once a referee has completed their reference, you will receive an automated email advising that a reference has been completed.

Please note that referees do have the option to decline the reference check. Below is an example of the notification you will receive if they do decide to decline:



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 report/s are able to be viewed and/or downloaded.