

An option for faculty recruitments is to automatically have an email request for a Letter of Reference/Recommendation sent to each reference listed for every application upon submission.

## Steps for an AUTOMATED request for a letter of reference/recommendation:

- **WHAT YOU DO**

- When you set up the job posting you will choose **Yes** for **Use Reference Form in Application\***.

Use Reference Form in Application:\*  Yes  No

- Also on the job posting you will choose the **Recruitment Process -- Faculty W/Automated References**.

Recruitment process:\* Faculty No Reference Automation ▼  
Select  
Recruitment Type: Faculty No Reference Automation  
Faculty W/Automated References  
JEMS REPORTING INFO Staff

- **WHAT THIS MEANS TO THE APPLICANT**

- When a job seeker fills out the application, they will be required to enter the names, type and email addresses for three references.
- When the job seeker completes the application and **Submits** the application, an email is generated to each reference that gives instructions on how to upload a letter of reference/recommendation.
- The reference is given a **three-week deadline** to upload the letter.
- The applicant does not see the request and you will not need to take any action to ensure the request gets sent.

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If you **do not automate** the process (you select Faculty No Reference Automation or Staff), you can still request a letter of reference/recommendation.

## Steps for a MANUAL request for letters of reference/recommendation:

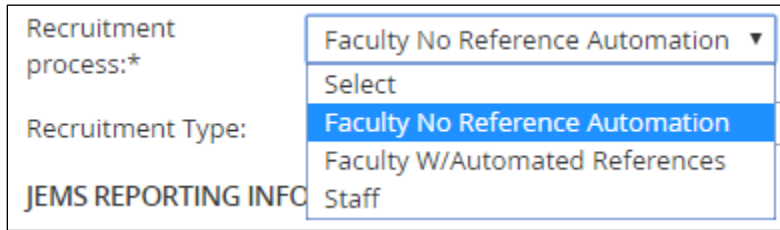
- **WHAT YOU DO**

- When you set up the job posting you will choose **Yes** for **Use Reference Form in Application\***.

Use Reference Form in Application:\*  Yes  No

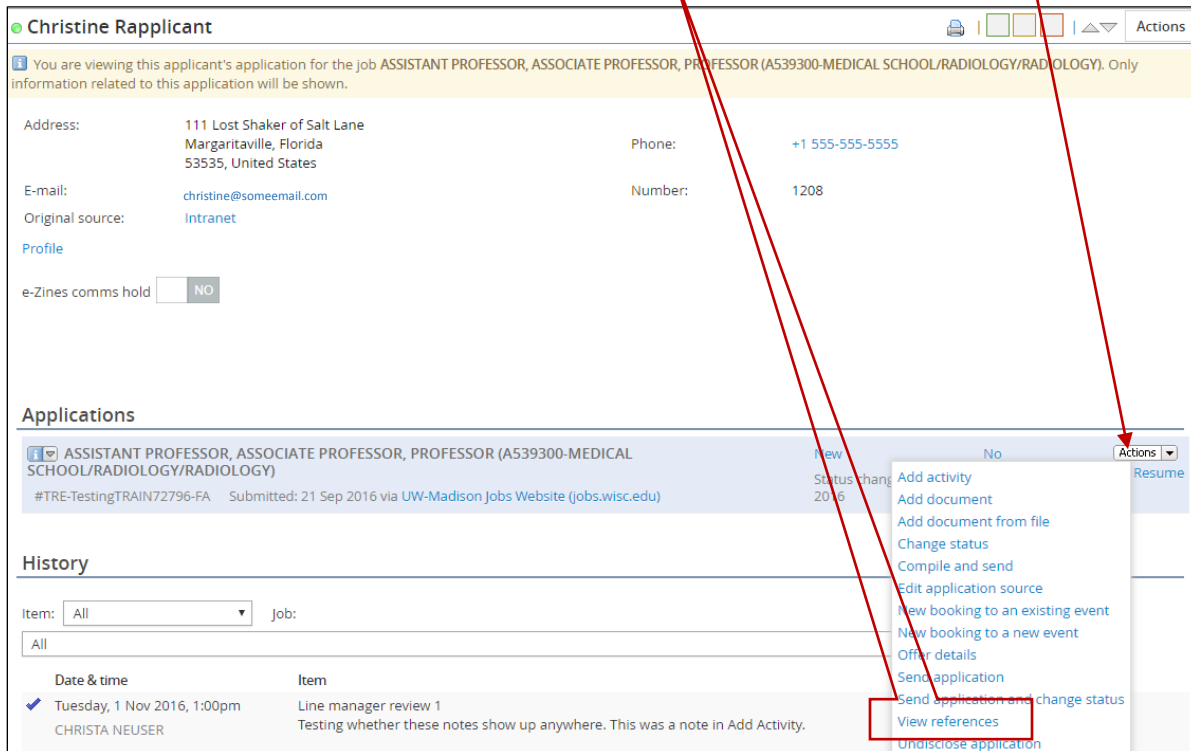
# Requesting Letters of Reference/Recommendation

- Also on the job posting you will choose the **Recruitment Process** of either **Faculty No Reference Automation** or **Staff**. (Letters of Reference/Recommendation are requested most often with a faculty recruitment, but may be used on a staff recruitment.)



A screenshot of a dropdown menu for 'Recruitment process:\*'. The menu is open, showing options: 'Faculty No Reference Automation' (selected), 'Select', 'Faculty No Reference Automation', 'Faculty W/Automated References', and 'Staff'. Below the menu, 'Recruitment Type:' is also set to 'Faculty No Reference Automation'. A label 'JEMS REPORTING INFO' is visible to the left.

- Once you have decided which applicants for whom you would like to request letters of reference, you can manually push out the email request for a single applicant or in bulk fashion for multiple applicants.
- **Individual:** On the applicant card, choose **View References** from the small actions menu.



A screenshot of the TREMS system showing an applicant profile for 'Christine Rappaport'. The profile includes contact information (Address: 111 Lost Shaker of Salt Lane, Margaritaville, Florida 53535, United States; Phone: +1 555-555-5555; E-mail: christine@someemail.com; Number: 1208) and a 'Profile' link. Below the profile is the 'Applications' section, showing a table with one application for 'ASSISTANT PROFESSOR, ASSOCIATE PROFESSOR, PROFESSOR (A539300-MEDICAL SCHOOL/RADIOLOGY/RADIOLOGY)'. The application was submitted on 21 Sep 2016. A dropdown menu is open for the application, showing options: 'Add activity', 'Add document', 'Add document from file', 'Change status', 'Compile and send', 'Edit application source', 'New booking to an existing event', 'New booking to a new event', 'Offer details', 'Send application', 'Send application and change status', 'View references' (highlighted with a red box), and 'Undisclose application'. A 'History' section is also visible, showing a 'Line manager review 1' on Tuesday, 1 Nov 2016, 1:00pm.

- Choose **Send invitations**. **\*\*Note: You can also edit the reference information from this screen.**

**Manage references**

New | **Send invitations**

Job: ASSISTANT PROFESSOR, ASSOCIATE PROFESSOR, PROFESSOR (A539300-MEDICAL SCHOOL/RADIOLOGY/RADIOLOGY) (TRE-TestingTRAIN72796-FA)

Status: Active Clear Search

| First name | Last name | Type of referee | Status | Expiry | Score | Organization | Reference position | Work phone number | E-mail            | Length of Test  |
|------------|-----------|-----------------|--------|--------|-------|--------------|--------------------|-------------------|-------------------|---|
| Bucky      | Badger    | Employer        | -      |        |       |              |                    |                   | bucky@bucky.com   | <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">Archive</a> |
| Becky      | Badger    | Manager         | -      |        |       |              |                    |                   | wi@wi.com         | <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">Archive</a> |
| Biffy      | Badger    | Professional    | -      |        |       |              |                    |                   | bascom@bascom.com | <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">Archive</a> |

Page 1 of 1 | Jump to page  | Done

Records 1 to 3 of 3

- Set the **Expiry Days** (number of days until due) and customize the email if needed. **\*\*Do not change any of the information in { brackets }.** Bracketed information is for merge fields and these will fill in as needed.
- Changing the “From” address to your own will ensure the recipient can reply to you if there are questions or concerns.

**Send invitations**

Expiry Days:\*

E-mail from:\* uwjobs@wisc.edu

E-mail subject:\* UW-Madison Reference Check Invitation for {FIRSTNAME} {LASTNAME}

E-mail body:\* Merge fields

**B I** Tools

Dear {REFEREEFIRSTNAME},

{FIRSTNAME} {LASTNAME} recently applied for a position with the University of Wisconsin-Madison and has listed you as a reference. In order to move forward in the next stage of the recruitment process, we need your assistance in completing a reference letter on {FIRSTNAME}'s behalf.

To upload the letter of recommendation, please click on the following link. Once the letter has been uploaded, click on 'Submit.'

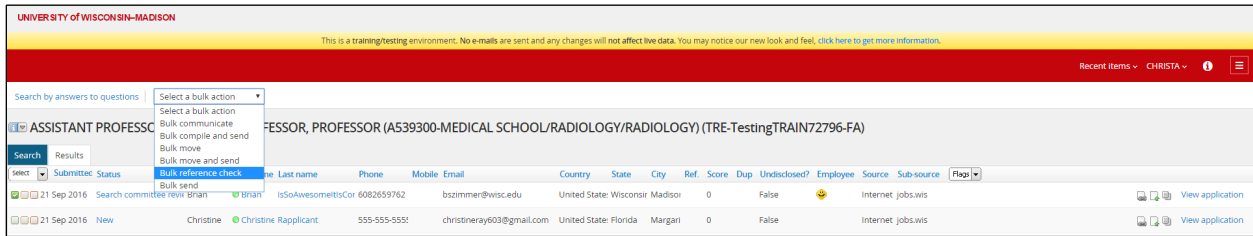
{REFERENCECHECKURL}

If you have any questions, please contact uwjobs@wisc.edu.

Please fulfill this reference letter request by {REFERENCECHECKEXPIRY}.

We appreciate your prompt attention to this matter,  
Talent Recruitment and Engagement  
Office of Human Resources  
University of Wisconsin-Madison

- **Bulk:**  
When viewing the entire list of applicants, select everyone for whom you want to collect letters of reference. **Select the Bulk Action – Bulk Reference Check**



- Set the deadline for when the letters are due (**Invitation expiry date**)

### Request reference check

Please fill in all mandatory fields marked with an asterisk (\*).

Bulk action status: ✔ 3 Applicants Complete

You have requested to perform reference checks for 3 applicants.

Please select the expiry date for the reference check invitation:

Invitation expiry date:\*

- Customize the email message as needed and finish. **\*\*Do not change any of the information in { brackets }.** Bracketed information is for merge fields and these will fill in as needed.
- Changing the “From” address to your own will ensure the recipient can reply to you if there are questions or concerns.

### Request reference check

Bulk action status: ✔ 3 Applicants Complete

You are able to request reference checks from 8 references, on behalf of 3 applicants.

[Preview the references who will be invited to provide reference checks.](#)

Emails will only be sent to references with a valid email address.

You can communicate using the methods below:

E-mail: References:  Yes  No

From:\*

Subject:\*

Message:\*

Format selection Tools

**B I**

Dear {REFEREEFIRSTNAME},

{FIRSTNAME} {LASTNAME} recently applied for a position with the University of Wisconsin-Madison and has listed you as a reference. In order to move forward in the next stage of the recruitment process, we need your assistance in completing a reference letter on {FIRSTNAME}'s behalf.

To upload the letter of recommendation, please click on the following link. Once the letter has been uploaded, click on 'Submit.'

{REFERENCECHECKURL}

If you have any questions, please contact uwjobs@wisc.edu.

Please fulfill this reference letter request by 14 November 2016.

We appreciate your prompt attention to this matter,  
Talent Recruitment and Engagement

## - WHAT EITHER PROCESS (Auto or Manual) MEANS FOR THE REFERENCE

- When a reference receives the email, the individual will click the URL listed in the message.
- At the URL, the reference will upload the letter.

**Reference check**




You are providing a reference for **Lauren Butters** for the position **ASSISTANT PROFESSOR, ASSOCIATE PROFESSOR, PROFESSOR**.


Please fill in all mandatory fields marked with an asterisk (\*).

Thank you for taking part in our reference letter upload process. Please upload your confidential reference letter. Your assistance on behalf of this applicant is greatly appreciated.

**Online reference check form**

Please Upload a Letter of Recommendation documentation:\*


  



- Upon Submit, the reference will see this confirmation screen.

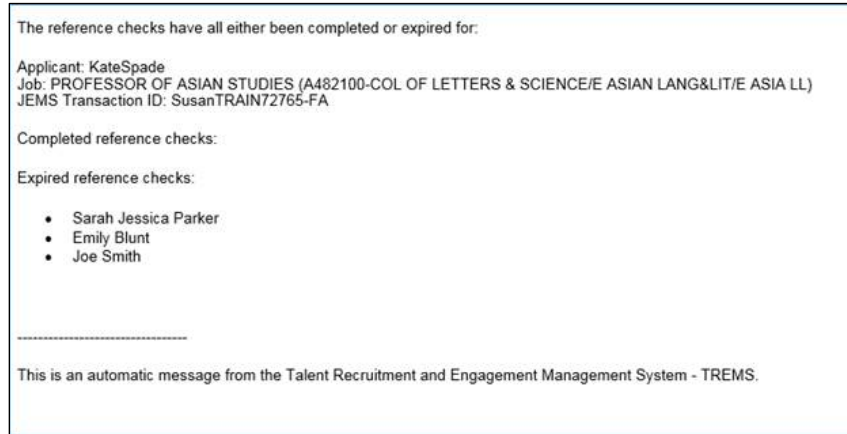
**Reference Check Complete**

The reference check has been successfully completed. Thank you for your time.



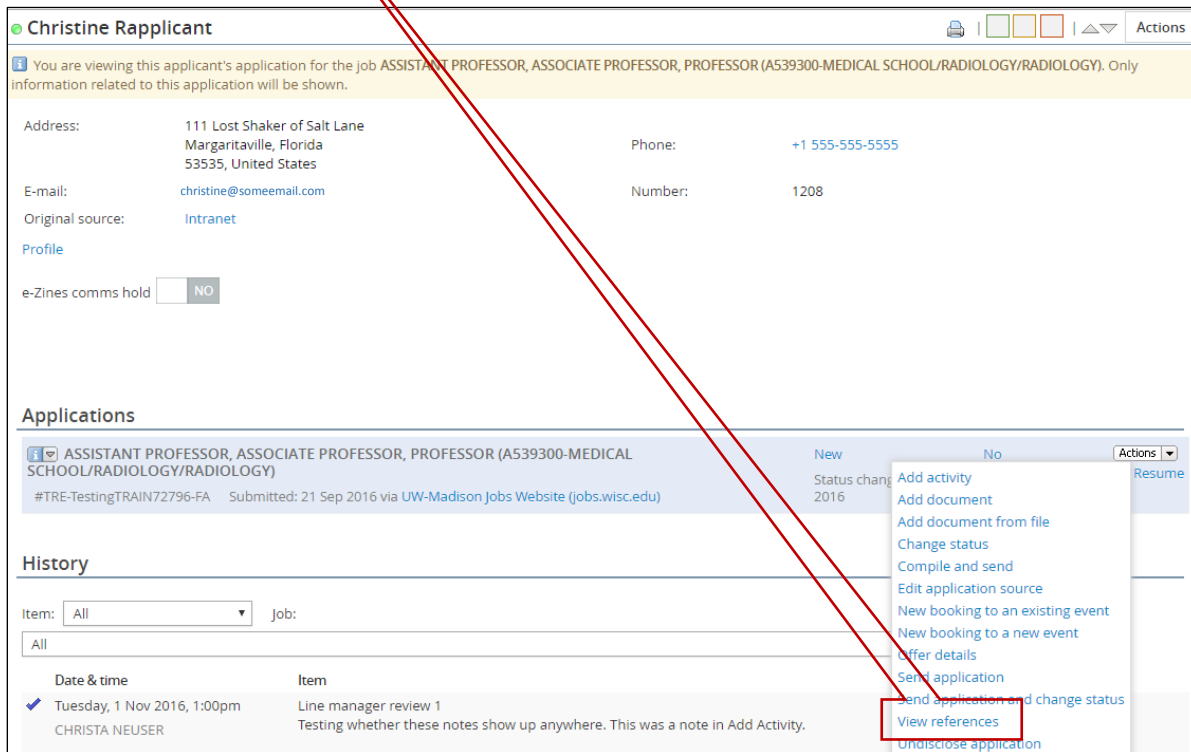
## - HOW YOU WORK WITH REFERENCES AND THE LETTERS

- When the due date for the letters passes, you will receive an email summary of which letters were completed and which requests expired.



- Anytime after the invitation has sent (either by the automated process, or a manual send), you can view the answer, resend the invitation, or control the reference and upload on their behalf, all from choosing **View References** from the applicant card.

*A Letter of Recommendation Status report is also available from the job posting card. This report includes invitations sent manually and automatically. The data includes reference contact information, invitation sent date, expiration date and date of completion. Instructions on how to access **Reports from the Job Posting Card** are available in the [TRE toolkit \(tre.ohr.wisc.edu\)](http://tre.ohr.wisc.edu).*



# Requesting Letters of Reference/Recommendation

- In the example below, only one of the three references has submitted a letter. Clicking **View answers** will open a window that has a link to the document.

| First name | Last name    | Type of referee | Status             | Expiry      | Score | Organization | Reference position | Work phone number | E-mail          | Length of Tenure | Actions  |
|------------|--------------|-----------------|--------------------|-------------|-------|--------------|--------------------|-------------------|-----------------|------------------|--|
| Jimmy      | Buffett      | Personal        | Completed          | 18 Nov 2016 |       |              |                    |                   | jimmy@jimmy.com |                  | <a href="#">View answers</a>   <a href="#">Edit</a>   <a href="#">Control</a>   <a href="#">Archive</a>                          |
| Fins       | TotheLeft    | Manager         | Invitation Expired | 23 Oct 2016 |       |              |                    |                   | fins@fins.com   |                  | <a href="#">View answers</a>   <a href="#">Edit</a>   <a href="#">Control</a>   <a href="#">Resend</a>   <a href="#">Archive</a> |
| Lost       | ShakerofSalt | Professional    | Invitation Expired | 23 Oct 2016 |       |              |                    |                   | lost@lost.com   |                  | <a href="#">View answers</a>   <a href="#">Edit</a>   <a href="#">Control</a>   <a href="#">Resend</a>   <a href="#">Archive</a> |

Reference check details - Christine Rappaport

Status: Check completed

Reference name: Jimmy Buffett

Relationship: Supplier

Reference position:

Organisation:

Candidate position:

Length of tenure:

Reference email: jimmy@jimmy.com

Referee telephone:

Referee secondary telephone:

Score: %

| Question   | Score  |
|--|--------|
| Please Upload a Letter of Recommendation documentation |        |
| Letter of recommendation cray1 (11kb)                  |        |
| Total Score  | / = 0% |

- Use the **Resend** link if you need to send a new invitation and/or extend the due date.
- Use the **Control** link if you need to submit the letter on behalf of someone.
- Use the **Edit** button to change the contact information.

- All documents will also show in the History section for the applicant on the applicant card.

Applications

ASSISTANT PROFESSOR, ASSOCIATE PROFESSOR, PROFESSOR (A539300-MEDICAL SCHOOL/RADIOLOGY/RADIOLOGY) #TRE-TestingTRAIN72796-FA Submitted: 21 Sep 2016 via UW-Madison Jobs Website (jobs.wisc.edu)

History

Item: All Job:

| Date & time                | Item  | Actions              |
|----------------------------|---|----------------------|
| Today, 8:59am              | Reference Letters: Letter of recommendation cray1.docx Size: 11kb | <a href="#">View</a> |
| Tuesday, 1 Nov 2016 1:00pm | Line manager: review 1  |                      |

# Requesting Letters of Reference/Recommendation

- You can add references beyond the original three, by using the **Add** command available in the **Manage references** screen. (Accessed by choosing **View references** from the small action menu on the applicant card.)

| First name | Last name    | Type of referee | Status             | Expiry      | Score | Organization | Reference position | Work phone number | E-mail          | Length of Tenure |
|------------|--------------|-----------------|--------------------|-------------|-------|--------------|--------------------|-------------------|-----------------|------------------|
| Jimmy      | Buffett      | Personal        | Completed          | 18 Nov 2016 |       |              |                    |                   | jimmy@jimmy.com |                  |
| Fins       | TotheLeft    | Manager         | Invitation Expired | 23 Oct 2016 |       |              |                    |                   | fins@fins.com   |                  |
| Lost       | ShakerofSalt | Professional    | Invitation Expired | 23 Oct 2016 |       |              |                    |                   | lost@lost.com   |                  |

**Add: Reference**

First name:\*

Last name:\*

Organization:

Type of referee:\*

Reference position:

Work phone number:

Preferred phone number:

E-mail:\*