The reference collection tool in the TMS is a valuable resource for search committees. It is possible for the system to:

- Collect names and contact information of references
- Automatically solicit letters of recommendation at predetermined workflow states
- Update an applicant’s workflow state to indicate that all of their letters of recommendation have been submitted.

The following slides will demonstrate how to use this resource when creating new Posting requests.
1. Select the Hire module by clicking the three dots in the top-left corner of the screen.

2. Select Initiator from the User Group drop-down menu.
1. Hover your cursor over the ‘Postings’ menu. Select ‘Admin Professional/Research Professional’ or ‘Faculty’ depending on the position type.
1. Once on the Postings page, click the + Create New Posting button and the 'Create New' box will appear.
1. Select Create from Position Description.

Note: Create from Position Type is only used when creating NEW Open Pools. See the Open Pools training guide for details.

Note: Create from Posting is only used when creating Open Pools from a PREVIOUSLY POSTED Open Pool. Selecting this option will clone and pull over all the information entered from a preexisting Open Pool posting. See the Open Pools training guide for details.
1. Choose your approved position description by selecting it from the list below, or click the More Search Options button then type in the first 6 numbers of the position number into the Position Number field to search for the position description you wish to create the posting from.

Note: You may or may not choose to include the .Version number after the position number (012345.0001) If you choose to exclude it, all versions of the position description will appear in the search. Be sure to select the correct, most up-to-date version.

2. To start the posting, click on the working title of the position description.

Shortcut: Hover over the Actions dropdown and select Create From to start the posting from the selected position description.
1. Review the approved position description to ensure that it is the correct version then click the Create Posting from this Position Description button in the top right corner of the screen.
Setting up References in TMS – Settings Page

1. Navigate to the ‘References’ section on this page.

Note: Most of these fields will pull over from the position description.
Note: If you will be soliciting *letters of recommendation*, you will need to update the three fields below. Otherwise, if the committee only wishes to use the reference tool to *collect names and contact information* of applicant references, please proceed to page 16 and leave this section unaltered.

The following slides will go over fields 1, 2, and 3.

### References

**Reference Notification**

1. Request References to submit Recommendations when candidate reaches selected workflow state?

**Recommendation Workflow**

2. When all Recommendations have been provided, move to selected workflow state?

**Recommendation Document Type**

3. Allow a document upload when a reference provider submits a Recommendation?

### Online Applications

- Accept online applications?
- Special offline application instructions: References will not be contacted without prior notification of candidates.
1. The ‘Reference Notification’ drop-down menu allows the committee to select which applicant workflow state the system will automatically send out emails to references, requesting them to submit their letters of recommendation.

In this example, the ‘Reference Notification’ workflow state is set to ‘Under Review by Dept/Committee’, meaning that as soon as an applicant ‘certifies and submits’ their application (applies), an email from the system will automatically be sent out to all of their references asking them to upload a letter of recommendation. An example of the email that is sent out to references can be found on page 23.

If the committee would like more control over when reference request emails are sent out, OEO suggests selecting the ‘Check References’ applicant workflow state. Once an Applicant Manager moves an applicant into this selected workflow state, the system will automatically notify references. This is a good solution if the committee anticipates a large applicant pool and doesn’t wish to solicit letters or recommendation for every applicant, this allows the committee to control when emails are sent from the system.

The committee may also decide to leave this field blank (if you choose to leave this field blank, please proceed to page 21 for instructions on how to send out reference request emails manually). Leaving this field blank ensures that reference request emails will never be sent by an accidental workflow transition in the system.
Setting up References in TMS – Settings Page, Field 2

2. The ‘Recommendation Workflow’ drop-down menu allows the committee to select the desired workflow state applicants will automatically transition into once all their letters of recommendation have been received.

In this example, the ‘Recommendation Workflow’ workflow state is set to ‘All Reference Letters Submitted’, meaning that as soon as an applicant receives all of their letters of recommendation from their references, the system will automatically update their workflow state to ‘All Reference Letters Submitted’.

There are pros and cons to using this field.

**Pro**: If a committee is considering a complete application to contain all letters of recommendation, selecting ‘All Reference Letters Submitted’ makes it easier to determine who has all their letters and who doesn’t, without having to go into each individual job application. Please see page 14 for instructions on how to fill out the Special Instructions Summary if a committee is requiring all letters of recommendation for a complete application.

**Cons**: The system will automatically update workflow states for all applicants once they receive all of their letters, even for Inactive applicants. If an applicant was already placed in the ‘Determined did not meet minimum qualifications’ and they were to receive all their letters of recommendation, the system would automatically move them back into the active workflow state ‘All Reference Letters Submitted’.

Unless letters of recommendation are required for a complete application, OEO recommends leaving the ‘Recommendation Workflow’ drop-down blank. This will ensure that applicants remain in the same workflow state once all their letters have been received.
3. The ‘Recommendation Document Type’ drop-down allows the committee to select which document, if any, references will be able to upload through the reference portal. If ‘No Document’ is selected, a reference will only be able to provide their name, and how they know the individual in the reference portal. If ‘Reference Letter’ is selected, references will be required to upload a letter of recommendation through the reference portal. If the committee is soliciting letters of recommendation, ‘Reference Letter’ must be selected.
Note: The ‘Special offline application instruction’ field allows the committee to enter in explicate directions to applicants which will be displayed at the top of the job posting when applicants apply. These ‘directions’ should address what’s needed to apply e.g. Resume, Cover Letter, References etc.

If the committee is choosing to solicit letters of recommendation from references, this will need to be communicated to applicants in this field. If a committee is also requiring all letters of recommendation to be uploaded for a application to be considered complete, this will need to be stated here as well.

A good example of language to use in this field if a committee is requiring all letters of recommendation for a complete application is:

“A complete application includes: Cover Letter which addressed the minimum and preferred qualifications, resume, and the names and contact information for three professional references. References will be contacted immediately upon submission of application and will receive an email with a link to submit their letter. For an application to be considered complete, all three letters of recommendation must be submitted prior to (one week after full consideration date). No mail in applications or letters will be accepted.”

Note: This field also shows up on the ‘Posting Details’ page of a posting. Whatever is entered in this field on the ‘Settings’ page will pull over to the posting details page. You may edit the content of this field in either location.
Next steps: Reference Tab

The following page skips straight to the ‘Reference’ tab of a Posting.

For continued directions on how to fill out the posting request in it’s entirety please see our AP Posting guide, starting on page 9 located here:

https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-an-Admin-Pro-Job-Posting.pdf

For continued help with Faculty Postings, please see our guide, starting on page 10 located here:

https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-a-Faculty-Job-Posting.pdf
Note: From the Posting Details page, select the ‘References’ tab from the left side menu.
Note: The ‘References’ tab allows the committee to select the amount of references they want an applicant to enter when applying (go to page 19 to view how the reference section appears to applicants when applying). If you are going to be soliciting letters of recommendation from references, the ‘Minimum and Maximum Number of References’ fields will need to match.

Note: The ‘Last Day a Reference Provider Can Submit a Reference Letter’ field allows the committee to select a “cutoff” date for references. If a reference were to try and access the reference portal past this date, the link would no longer work and the reference would not be able to supply information. **OEO does not recommend utilizing this feature**, meaning the reference link will remain ‘active’ until the reference uploads their information. If the committee does wish to select a date, this date must be at least **one week after the Close Posting Date** to allow for reference letters to be uploaded for late applicants. By leaving this field blank, it in no way extends the posting as this date only applies to references.

Note: Select ‘Yes’ from the ‘Accept Reference Letters’ drop-down menu if you are soliciting letters of recommendation from applicant references, otherwise select ‘No’. 
Applicant and Reference Views/Emails examples

The following slides show examples of:

- Applicant’s view when applying.................................................................19
- Examples of the results from selections made on pages 11 & 12................20, 21, 22
- Email sent to references.................................................................................23
- References views when accessing the reference portal..............................24, 25
- Email sent to references letting them know that their letters have been received......26
- Email sent to applicants letting them know that their references have responded......27
- View of Job Application page in TMS once all letters have been received..................28
Note: This is the ‘Professional Reference’ section of a job application. Everyone that applies to a position through the CSU Jobs website will be taken to this page.

Note: The ‘Add Professional References Entry’ button will disappear once the maximum number of references have been entered by the applicant.
Note: After an applicant certifies and submits their application (applies), a ‘Job application’ page will be created for them in TMS. This page is only visible to Applicant Managers and Committee Members and can be found by clicking on the applicants first name from the ‘Applicant’ tab within the posting.

Note: In the example from page 11, we set up ‘field 1’ on the settings page to solicit letters of recommendation from references as soon as the applicant applied and transitioned into the workflow state ‘Under Review by Dept/Committee’. As you can see, the system has already notified (sent out reference request emails) Harry Potter’s references automatically.
Note: In the example, applicant Hermione Granger has applied and is currently in the workflow state ‘Under Review by Dept/Committee’. The system has not notified her references.

To send out the system emails manually, the Applicant Manager must navigate to the Recommendations tab in an applicant’s job application. From here, they will be able to click the ‘Send’ button next to each of the listed references.

Note: If the committee decides to leave ‘field 1’ blank on the settings page, they will need to send out reference request emails manually.
Job Application – How to send out reference request emails manually (cont.)

Note: Once the emails have been sent, the ‘Send’ button will display as ‘Resend’. You can click on the ‘Resend’ button if a reference or applicant requests that the email be sent out again.

Notice how the ‘Notified’ column time stamps when the emails were sent out to references.

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Notified?</th>
<th>Responded?</th>
</tr>
</thead>
<tbody>
<tr>
<td>test</td>
<td><a href="mailto:test@gmail.com">test@gmail.com</a></td>
<td>05/29/2019 01:06 PM</td>
<td>No</td>
</tr>
<tr>
<td>test</td>
<td><a href="mailto:test@gmail.com">test@gmail.com</a></td>
<td>05/29/2019 01:06 PM</td>
<td>No</td>
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<tr>
<td>test</td>
<td><a href="mailto:test@gmail.com">test@gmail.com</a></td>
<td>05/29/2019 01:06 PM</td>
<td>No</td>
</tr>
</tbody>
</table>

No recommendations have been submitted for this application.
Hello,

Hermione Granger has applied for the position of Instructors - Open Pool, at Colorado State University. You were listed in the application as a reference.

For more information about this position, please refer to the position information below or visit: http://colostate-sb.peopleadmin.com/postings/65755

**Position Information:**

**Title:** Instructors - Open Pool

**Position Summary:**

Temporary, part-time instructor positions may become available throughout the year in any of the five academic departments listed below. Areas include: Defense Against the Dark Arts, Divination, Muggle Studies, Charms and Herbology.

**Instructions for completing and submitting the reference:**

1. Please visit the reference portal at http://colostate-sb.peopleadmin.com/ref/new/1050092/636e5e0111e8880a-c0104bf553e6
   
   If you are unable to click this link, please copy and paste the link, with no spaces, into your browser address bar.

2. On the reference submission web page, please fill in the various fields and upload your letter of recommendation.

3. Click "Submit" at the bottom of the page.

Please upload your letter of recommendation as soon as possible upon receipt of this email. See the Applicant Special Instructions below for information regarding recommendation letter requirements.

**Applicant Special Instructions:**

To add your name to the applicant pool, please upload individually a letter of interest, Curriculum Vitae, sample syllabus, and contact information for three professional references that can speak to your teaching. Please indicate in your letter of interest courses you are qualified to teach and your experience teaching students. This pool expires on May 21, 2020. Individuals wishing to be considered beyond this date must reapply. References will not be contacted without prior notification of candidates.

You will receive a confirmation email upon the submission of your letter. If you do not receive a confirmation email, please check your spam folder before contacting the Search Contact listed below.

Thank you,
Office of Equal Opportunity

**If you have a concern or question please DO NOT reply to this email. Instead contact:** Becca McCarty, becca.e.mccarty@colostate.edu, (970) 491-5836.
Note: When a reference clicks on the unique link located in the system email, they will be taken to this page. Here they will enter information into various fields pertaining to how they know the applicant.
Note: If ‘Reference Letter’ was selected from the ‘Recommendation Document Type’ drop-down menu (field 3) found on the settings page, this bottom section will appear for the reference, allowing them to upload their letter of recommendation.
We have received your recommendation letter for Hermione Granger who has applied for the Instructors - Open Pool position at Colorado State University. Thank you for completing this information. We can now continue with the review of this candidate, incorporating the valuable information provided.

Thank you,

Office of Equal Opportunity
oeo@colostate.edu
970-491-5835

Note: Once the reference has submitted their recommendation through the reference portal, they will receive this automatic system email.
Dear Hermione,

This is to inform you that we have received a response from one of your references for your application to the Instructors - Open Pool position with Colorado State University. The search committee is in the process of reviewing applicants and you will be notified if selected for further consideration.

To check on the status of your references, please see the help guide located here: https://oeo.colostate.edu/media/sites/144/2017/05/CSU-How-to-check-the-status-of-your-recommendation-letters.pdf

If you have any questions or concerns regarding your references/application please contact the Search Contact: Benette Wallace, benette.wallace@colostate.edu.

Thank you,
Office of Equal Opportunity
eo@colostate.edu
970-491-5836

Note: Once the reference has submitted their recommendation through the reference portal, the applicant will receive this automatic notification email from the system.
Note: In this example from page 12, we set up ‘field 2’ on the settings page to update the applicants workflow state to ‘All Reference Letters Submitted’ once the system received all three letters of recommendation. As you can see, the system has logged all three of Hermione’s letters of recommendation, and her workflow state has automatically been updated. If ‘field 2’ had been left blank on the settings page, Hermione’s workflow state would have remained the same once the system received all of her letters of recommendation.
Need further help?

For additional help, contact the Office of Equal Opportunity at:
(970) 491-5836
Or
oeo@colostate.edu