

PASS Online Referencing Quick Guide

TIMEGATE RECRUIT

Customer Name (as appropriate) / Version



COMMERCIAL STATEMENT

This document is subject to any terms as per teamssoftware.com/legal.

TABLE OF CONTENTS

PROCESS	4
Sending to online referencing	4
The referee gets an e-mail to complete the reference.....	4
Select the link to ask the referee to confirm their e-mail address	5
The referee is sent a second e-mail to complete the reference	5
The web page will ask whether the referee will complete the reference	6
The referee completes the online reference	6
Or the referee attaches their reference file	7
A legal statement is shown with sensitise information questions	7
The completed reference is sent to PASS. The referee receives a thankyou message and email	7
PASS shows the reference has been received and requires review	8
The To Do List shows “References To Review” count.....	9
Select “References to Review” to show the Reference List for Selection	9
The reference is reviewed with attached documents.....	9
Reference Is confirmed where there Is a difference	10
Document attached with a certificate that the information has been entered online	10
STANDARD TEMPLATES	11
Page_Welcome.html	11
Page_Landing.html.....	11
Email_Abort.html	11
Email_Chase.html	12
Email_Initial.html.....	12
Email_Password.html	13
Email_ThankYou.html.....	13
Page_Landing.html	13
Page_Legal.html	14
Page_Reference.html.....	14
Page_ThankYou.html.....	14
Page_UploadRef.html.....	14
Certificate.dotx.....	14

PROCESS

Sending to online referencing

Send Action
 Letter
 Fax
 Email
 Online

Document: None
Doc Note: [Text Area]
When: Now Later 13:32 Queue

Country: UNITED KINGDOM
Telephone: [Field]
Facsimile: [Field]
Mobile: [Field]
Email: dave.round@innovise.com

Next Action To Take
Next Action: [Field] Owner: Screening Team
0 Mins [Field] Hrs 2 Hrs 4 Hrs 1 Day 0 Days
Next Chase: 30-Jul-2018 21:32

Job History

From	To	Job Title

Add Notes: [Text Area]

The referee gets an e-mail to complete the reference

Fri 27/07/2018 12:53
PO PASS Online Referencing <PASSOnlineReferencing@innovise.com>
Request to Complete Online Reference

To: Dave Round

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear DAVE TESTING TESTING,

Re: Personal reference request for DAVE ROUND-TESTING.

DAVE has given us consent to approach you or your company for a reference. It would greatly help DAVE if you could [click here](#) and answer a few simple questions in order for us to verify the information provided by DAVE.

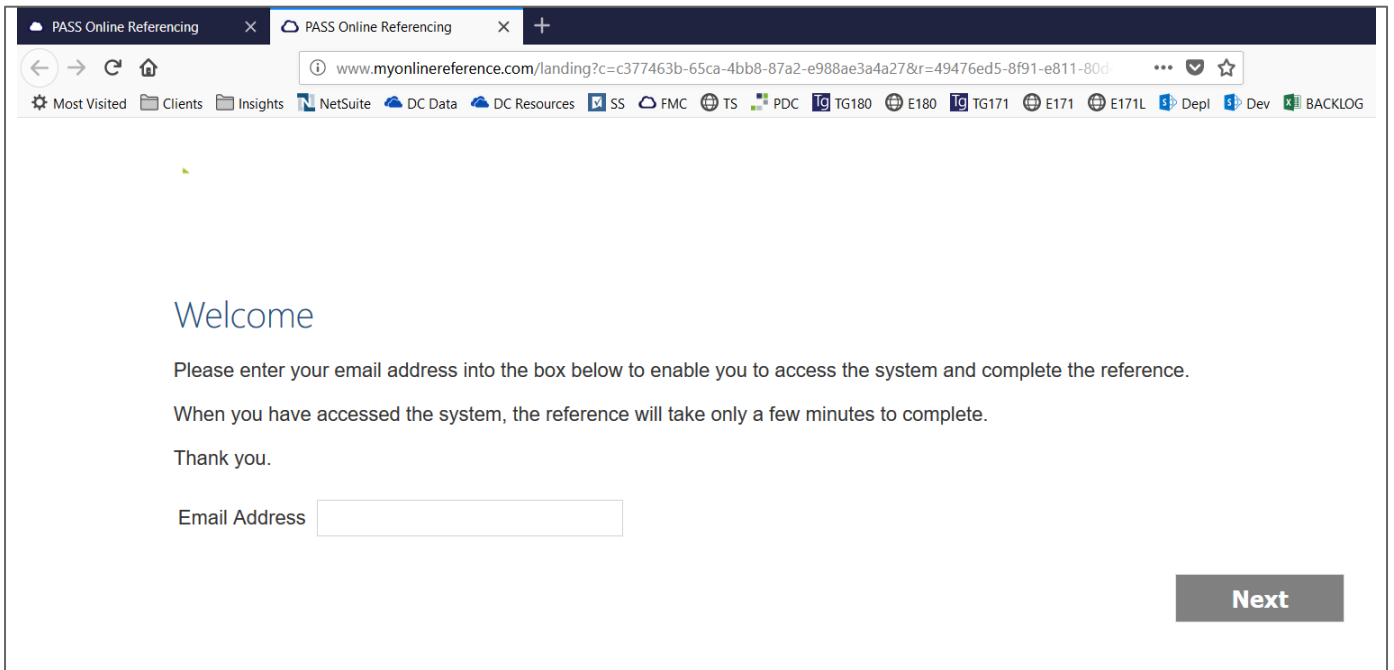
DAVE's signed consent form can be viewed by clicking the above link. You will also have the opportunity to upload your own template reference document after clicking the above link.

If you are unable to provide a reference for any reason please [click here](#) and follow the instructions to decline it.

We look forward to you reply but if you need to contact us our details are below.

Kind Regards,
The Screening Team

Select the link to ask the referee to confirm their e-mail address



PASS Online Referencing

www.myonlinereference.com/landing?c=c377463b-65ca-4bb8-87a2-e988ae3a4a27&r=49476ed5-8f91-e811-80d

Welcome

Please enter your email address into the box below to enable you to access the system and complete the reference.

When you have accessed the system, the reference will take only a few minutes to complete.

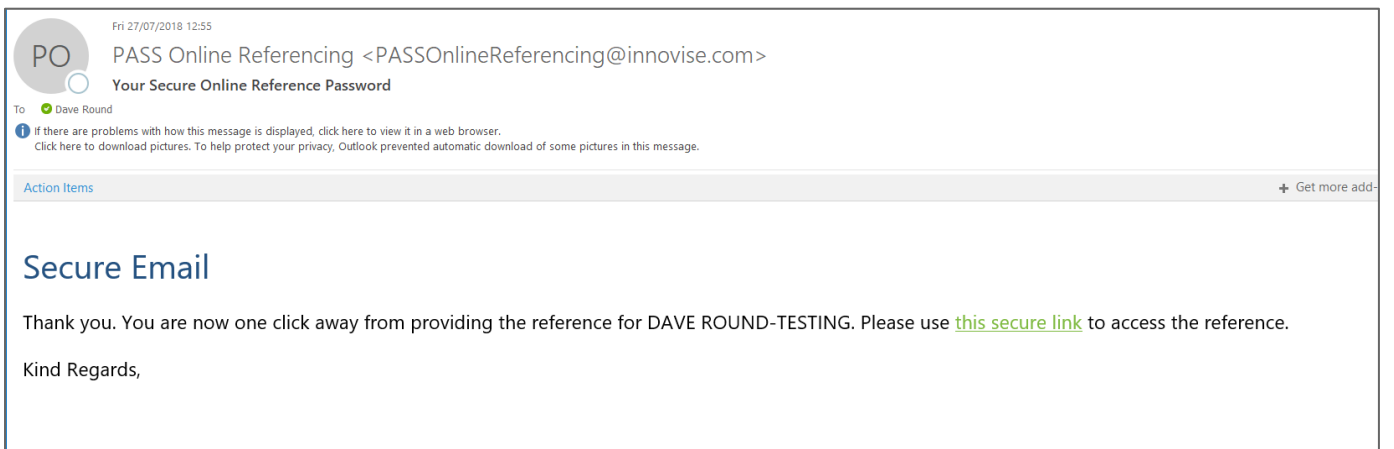
Thank you.

Email Address

Next

Thank you. We have just emailed you a secure link that you can use to complete the process. You can now safely close this window.

The referee is sent a second e-mail to complete the reference



Fri 27/07/2018 12:55

PO PASS Online Referencing <PASSOnlineReferencing@innovise.com>

Your Secure Online Reference Password

To: Dave Round

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Action Items Get more add-

Secure Email

Thank you. You are now one click away from providing the reference for DAVE ROUND-TESTING. Please use [this secure link](#) to access the reference.

Kind Regards,

The web page will ask whether the referee will complete the reference

Rejection will feedback to PASS that the Reference needs reviewing

Welcome Back!

This process will take only a few minutes of your time. Mandatory fields are marked with a * so please ensure these fields are completed fully. The information below has been provided to us by DAVE.

You are: DAVE TESTING TESTING.

You have been asked to confirm a Personal reference for:

- **First Name:** DAVE
- **Surname:** ROUND-TESTING
- **NI Number:** AA112233A

If this is correct and you are willing to confirm this reference then please select the appropriate option and press the 'Next' button to continue or click the 'Upload Ref.' button to upload your own template reference document.

If the information is not correct, or you are not willing to confirm this reference then please select the appropriate option and tell us why in the box below.

You can view DAVE's consent form which gives us permission to seek this reference by clicking the 'View Consent' button.

I am happy to confirm this reference
 I do not want to confirm this reference because:

Cancel**Upload Ref.****Next**

The referee completes the online reference

DAVE has provided us with the following information. Could you please check this is correct and amend anything that isn't by replacing the text in the appropriate box. Any fields marked with a * are mandatory so please ensure these are completed fully before continuing.

Reference Information

From *	<input type="text" value="01/03/2000"/>
To *	<input type="text" value="27/07/2018"/>
Relationship to you *	<input type="text" value="teacher"/>

Cancel**Back****Next**

Or the referee attaches their reference file

Please select the document you wish to upload then click next.

Reference CANDIDATE RETURNED REFERENCE.pdf

A legal statement is shown with sensitise information questions

Legal

Who we are

Myonlinereferencing is a 3rd party referencing service provided by PASS Software Ltd.

Your data

We store only the contact details we have been supplied by the candidate and a copy of the reference in accordance with the Data Protection Act 1998.

Sharing your data

We only use the information you provide for employment purposes and we will not disclose your information to anyone for any other purpose unless we have your express permission or we are required to do so by law.

Sensitive information

Some of the information we ask you to provide may be sensitive personal information, as defined by the Data Protection Act 1998. We will not use this sensitive personal data except for the specific purpose of ascertaining suitability for employment.

None

Would you like this reference to be treated as confidential?

Would you like your name withheld in accordance with the Data Protection Act 1998

I agree to the terms and conditions

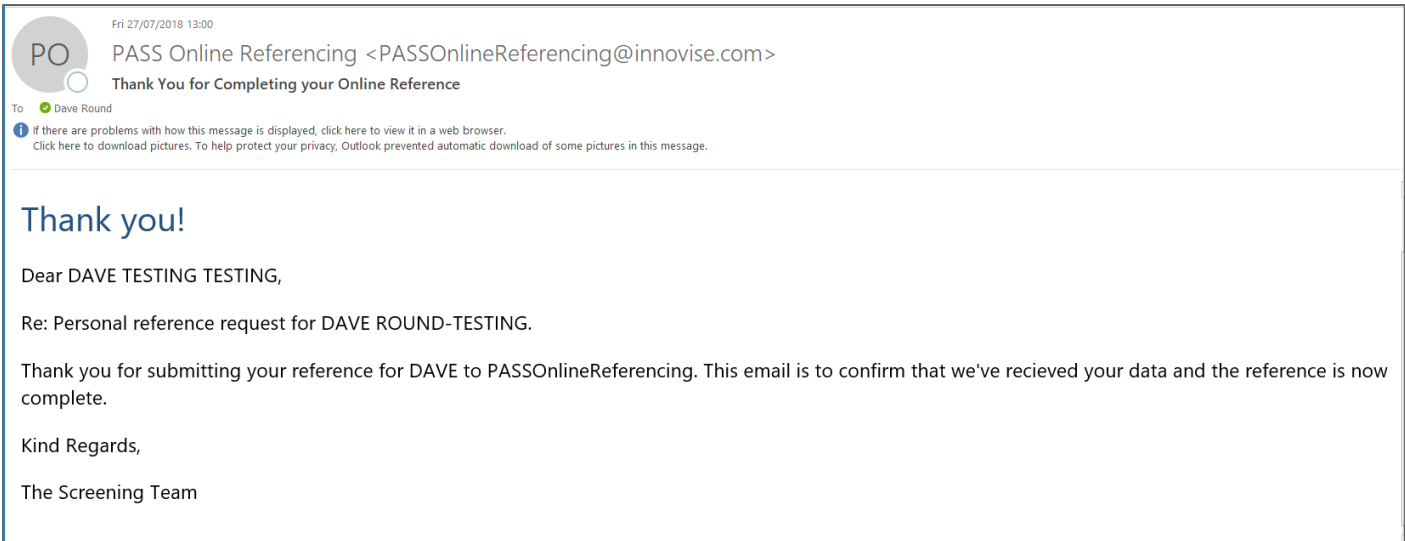
The completed reference is sent to PASS. The referee receives a thankyou message and email

Thank You!

Thank you for submitting your reference for DAVE to My Online References.

We have received your data and the reference is now complete.

Thank you.



PASS shows the reference has been received and requires review

Candidate - Mr DAVE TESTING TESTING ROUND-TESTING - AA112233A - KNIGHTSBRIDGE - BS7858 With SIA Licence - Permission

C18237 Screening has not started

PERMISSION In Progress

Stage SLA 0 Mins Candidate SLA 0 Mins

Details References Additional Data Checks Documents History Chart Qualifications Notes Integration UDFs

Progress

Pre	Personal	Provisional	Written	Other	Days
0	4	1	0	0	0

Outstanding References

Filter Type: [Dropdown] Stage: [Dropdown] Filter

From Date	To Date	Actual From	Actual To	Type	Company/Contact	Warnings	Privacy	Docs	Status	Guide
				LOA	DAVE TESTING TESTING ROUND-TE...			0	Entered	...
				ProofAddress				0	Entered	...
				ProofID				0	Entered	...
				Right To Work				0	Entered	...
				Credit Check				0	Entered	...
				SIA:Licence				0	Entered	...
				Final Employme...	DAVE TESTING TESTING ROUND-TE...			0	Entered	...
				Provisional Offer...	DAVE TESTING TESTING ROUND-TE...			0	Entered	...
				Additional Infor...	DAVE TESTING TESTING ROUND-TE...			0	Entered	...
01 Jan 2000	27 Jul 2018	01 Jan 2000	27 Jul 2018	Personal	DAVE TESTING TESTING			3	Written	...
01 Jan 2000	27 Jul 2018	01 Mar 2000	27 Jul 2018	Personal	James Brown			1	Requires Review	...
26 Jul 2013	27 Jul 2018	26 Jul 2013	27 Jul 2018	GAP				0	GAP	...

The To Do List shows “References To Review” count

Selected Team: All

Open Candidates	13466
Candidates Awaiting Sign Off	0
References To Chase	378
Candidate Actions	0
References To Review	1

Select “References to Review” to show the Reference List for Selection

References to Review

Client Name	First Name	Middle Name	Last Name	NI Number	Type	Screeener	Chase Type	Sent Date	Chase Started	Contact Name	Previous Action	Chase Count	Last Chased	Number
Knightsbridge G...	DAVE	TESTING	TESTING	ROUND-TESTING	AA112233A	BS7858 With S...	DRound1 (Dav...	Not Chased		James Brown		0		C18237

The reference is reviewed with attached documents

Details | User Fields

Contact Information

Reference Type: **Personal** | Screener Notes: ...

Referee Name: James Brown

Job Title:

Employer:

Gap Note

Reference Not Available

Candidate Information

From Date*: 01 Jan 2000 | Actual: 01 Mar 2000

To Date*: 27 Jul 2018 | Actual: 27 Jul 2018

Relationship to you*: teacher

Reference:

Dismissed: Yes No

Candidate Provided

Confirmation: None Provisional Written

Re-Employ*: Yes No No Policy

Reason:

Privacy: None Data Protection In Confidence

Multi Refs (1)

Document Upload

Document Date	Notes	Media Type	Action
ul 2018 13:10		PDF Document	View

Add | Delete

Add Notes

Comment

Make Public

Include In Candidate Report

OK | Cancel

Reference Is confirmed where there Is a difference

Candidate Information		Advised	Actual	Confirmation	Re-Employ*	Reason	Privacy
From Date*	01 Jan 2000	>	01 Mar 2000	<input type="radio"/> None	<input type="radio"/> Provisional	<input checked="" type="radio"/> Written	
To Date*	27 Jul 2018	>	27 Jul 2018	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> No Policy	
Relationship to you*	teacher	>	teacher				
Reference		>					
Dismissed	<input type="radio"/> Yes <input checked="" type="radio"/> No		<input type="radio"/> Yes <input checked="" type="radio"/> No				<input checked="" type="radio"/> None <input type="radio"/> Data Protection <input type="radio"/> In Confidence
<input type="checkbox"/> Candidate Provided			Multi Refs (1)				

Add Notes	Options
Knew from Mark not January but acceptable	<input checked="" type="checkbox"/> Comment
	<input type="checkbox"/> Make Public
	<input checked="" type="checkbox"/> Include In Candidate Report

Document attached with a certificate that the information has been entered online

Supplied by MyOnlineReferencing.com

Reference Information				
Reference Description:	<i>Personal</i>		Confidentiality Status:	<i>none</i>

Applicant Information			
Applicant Name:	<i>ROUND-TESTING</i>	<i>DAVE</i>	
NI Number:	<i>AA112233A</i>	Date of Birth:	<i>01-01-2000 00:00:00</i>
Position Applied for:	<i>N/A</i>		

Referee Contact Information			
Referee Name:	<i>James Brown</i>		
Email:	<i>dave.round@innovise.com</i>	Telephone:	<i>0123456</i>
Job Title:	<i>N/A</i>		
Company:	<i>N/A</i>		
Address:	<i>asdfsdf</i>		
	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
	<i>asdfsda</i>	<i>N/A</i>	<i>N/A</i>

Reference Details				
From:	To:	Job Title:	Reason for Leaving:	Dismissed?
<i>01/03/2000</i>	<i>27/07/2018</i>	<i>teacher</i>	<i>N/A</i>	<i>N/A</i>

Certification Details			
Client Email:	Client IP Address:	Completion Date/Time:	Referee Comments:
<i>dave.round@innovise.com</i>	<i>92.207.178.62</i>	<i>27-07-2018 12:09:12</i>	<i>N/A</i>
Reference Unique ID:	<i>4a476ed5-8f91-e811-80d4-00155d58700a</i>		

STANDARD TEMPLATES

Page_Welcome.html

This process will take only a few minutes of your time. Mandatory fields are marked with a * so please ensure these fields are completed fully. The information below has been provided to us by .

You are: .

You have been asked to confirm a reference for:

- **First Name:**
- **Surname:**
- **NI Number:**

If this is correct and you are willing to confirm this reference then please select the appropriate option and press the 'Next' button to continue or click the 'Upload Ref.' button to upload your own template reference document.

If the information is not correct, or you are not willing to confirm this reference then please select the appropriate option and tell us why in the box below.

You can view 's consent form which gives us permission to seek this reference by clicking the 'View Consent' button.

Page_Landing.html

Please enter your email address into the box below to enable you to access the system and complete the reference.

When you have accessed the system, the reference will take only a few minutes to complete.

Thank you.

Email_Abort.html

Dear ,

This is a courtesy email to let you know that the referee cancelled the validation process for , date of birth , national insurance number for a reference.

They may come back to complete the process later.

With many thanks,

Yours sincerely

Email_Chase.html

Dear ,

Re: reference request for .

has given us consent to approach you or your company for a reference. It would greatly help if you could [click here](#) and answer a few simple questions in order for us to verify the information provided by .

's signed consent form can be viewed by clicking the above link. You will also have the opportunity to upload your own template reference document after clicking the above link.

If you are unable to provide a reference for any reason please [click here](#) and follow the instructions to decline it.

We look forward to you reply but if you need to contact us our details are below.

Kind Regards,

The Screening Team

Email_Initial.html

Dear ,

Re: reference request for .

has given us consent to approach you or your company for a reference. It would greatly help if you could [click here](#) and answer a few simple questions in order for us to verify the information provided by .

's signed consent form can be viewed by clicking the above link. You will also have the opportunity to upload your own template reference document after clicking the above link.

If you are unable to provide a reference for any reason please [click here](#) and follow the instructions to decline it.

We look forward to you reply but if you need to contact us our details are below.

Kind Regards,

The Screening Team

Email_Password.html

Secure Email

Thank you. You are now one click away from providing the reference for . Please use [this secure link](#) to access the reference.

Kind Regards,

Compliance Team

Email_ThankYou.html

Thank you!

Dear ,

Re: reference request for .

Thank you for submitting your reference for to PASSOnlineReferencing. This email is to confirm that we've recieved your data and the reference is now complete.

Kind Regards,

The Screening Team

Page_Landing.html

Please enter your email address into the box below to enable you to access the system and complete the reference.

When you have accessed the system, the reference will take only a few minutes to complete.

Thank you.

Page_Legal.html

Who we are

Myonlinereferencing is a 3rd party referencing service provided by PASS Software Ltd.

Your data

We store only the contact details we have been supplied by the candidate and a copy of the reference in accordance with the Data Protection Act 1998.

Sharing your data

We only use the information you provide for employment purposes and we will not disclose your information to anyone for any other purpose unless we have your express permission or we are required to do so by law.

Sensitive information

Some of the information we ask you to provide may be sensitive personal information, as defined by the Data Protection Act 1998. We will not use this sensitive personal data except for the specific purpose of ascertaining suitability for employment.

Page_Reference.html

has provided us with the following information. Could you please check this is correct and amend anything that isn't by replacing the text in the appropriate box. Any fields marked with a * are mandatory so please ensure these are completed fully before continuing.

Page_ThankYou.html

Thank you for submitting your reference for to My Online References.
We have received your data and the reference is now complete.
Thank you.

Page_UploadRef.html

Please select the document you wish to upload then click next.

Certificate.dotx



Certificate.dotx

Supplied by MyOnlineReferencing.com

Reference Information

Reference Description:	Confidentiality Status:
<i>Personal</i>	<i>none</i>

Applicant Information

Applicant Name:	<i>ROUND-TESTING</i>	<i>DAVE</i>
NI Number:	<i>AA112233A</i>	Date of Birth: <i>01-01-2000 00:00:00</i>
Position Applied for:	<i>N/A</i>	

Referee Contact Information

Referee Name:	<i>James Brown</i>			
Email:	<i>dave.round@innovise.com</i>	Telephone:	<i>0123456</i>	
Job Title:	<i>N/A</i>			
Company:	<i>N/A</i>			
Address:	<i>asdf sdf</i>			
	<i>N/A</i>			
	<i>asdfda</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>

Reference Details

From:	To:	Job Title:	Reason for Leaving:	Dismissed?
<i>01/03/2000</i>	<i>27/07/2018</i>	<i>teacher</i>	<i>N/A</i>	<i>N/A</i>

Certification Details

Client Email:	Client IP Address:	Completion Date/Time:	Referee Comments:
<i>dave.round@innovise.com</i>	<i>92.207.178.62</i>	<i>27-07-2018 12:09:12</i>	<i>N/A</i>
Reference Unique ID:	<i>4a476ed5-8f91-e811-80d4-00155d58700a</i>		



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.