Onboarding - client user guide

What is Onboarding?

The Online Onboarding tool allows you to get all contracts, offer letters and any other required new starter documents available to your chosen candidate with just a few clicks.

Candidates can complete everything quickly and easily via the secure candidate portal, recruiters can track in real-time and the contract pack can be completed in a fraction of the time with no printing, postage or hassle.

We set up your initial onboarding documentation and create different onboarding packs within the system, then when it's all ready to go, you simply select the candidate you want to onboard, enter the offer details in their new starter form and choose which onboarding pack they should receive, which is instantly generated and made available to the candidate. A tailored, automatic email can also be sent to the candidate to ask them to complete the pack within their online profile.

After logging in, the candidate will see their personalised onboarding documents and can view, complete, print, accept and decline their documents as required - if a candidate declines a document, they are asked to provide reasons why.

Automated referencing functionality is also available as part of this module. You can ask a referee to log into a separate secure referencing portal and complete an online form - once completed, the system will display the information in the requester's client dashboard.
Onboarding - client user guide

Contents

What is Onboarding? .................................................................................................................. 1

Contents ........................................................................................................................................ 2

Enabling Access to Onboarding - Settings................................................................................... 3

Setting up Contracts ..................................................................................................................... 4

  Setting up Contract Sections .................................................................................................... 4
  Setting up Contracts .................................................................................................................. 6

Onboarding Set-Up ....................................................................................................................... 8

  Document Types ...................................................................................................................... 8
  Document Library ...................................................................................................................... 9
  Onboarding Settings ................................................................................................................ 10

Onboarding Forms ....................................................................................................................... 12

Onboarding Templates ................................................................................................................ 15

Automated Referencing .............................................................................................................. 18

Onboarding Process ..................................................................................................................... 19

  Completing the Starter Form ................................................................................................... 19
  Start Onboarding & References ............................................................................................... 21
  Start Onboarding ..................................................................................................................... 23
  Start References ...................................................................................................................... 25

Candidate Experience .................................................................................................................. 27

Managing a Candidate’s Onboarding ......................................................................................... 29

  New Starters ........................................................................................................................... 29
  My References ......................................................................................................................... 32
  Viewing Information within a Candidate Record ..................................................................... 34
  Viewing and Completing as a Referee ..................................................................................... 36

Example Email Template ............................................................................................................ 39

FAQs ............................................................................................................................................... 40
Enabling Access to Onboarding - Settings

Click on System Settings > Security Roles and click on the security role that needs access to onboarding.

On the Settings tab, tick next to all the Onboarding sections that the security role needs access to and click Save.

<table>
<thead>
<tr>
<th>Onboarding: Document Library</th>
<th>Access</th>
<th>Add</th>
<th>Update</th>
<th>Delete</th>
<th>Export</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding: Document Types</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onboarding: Settings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onboarding: Templates</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onboarding: Assessment Form</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For more information on Settings for other areas, please see the Settings HOW guide on the Jobtrain Info Hub.
Setting up Contracts

Setting up Contract Sections

The first step in creating new Onboarding contracts is to create the Contract sections. These are designed to allow you to either add the whole contract in one section or create separate sections for each clause or section of the contract.

- Click on User > Communications > Letter Options > Contract Sections and select New Contract Section.

- Give the contract section a title - If adding contracts in one section, give this the same title as the contract will have; if using to add a section or clause, give this section the name of the clause/section.

- Enter the information into the box and use the available tools in the formatting box to format the wording. As with any copied wording, it’s advisable to copy the wording into Notepad (or equivalent programme) before copying into the system to ensure all hidden formatting is removed.
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To enter merge fields, place the cursor in the correct part of the document, then click Insert/Update Data Field.

Select the required merge field from the list and click OK.

NB. – merge fields that have been added to the merge field list from the New Starter Form will appear under the Table Type of StarterForm, as below;
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- Once you are happy with all formatting and have added all required merge fields, click Save, then Close.

- Complete as many Contract sections as required before moving onto the next stage.

Setting up Contracts

Now you have created the contract sections, you can begin to create contracts.

- Click on User > Communications > Letter Options > Contracts and select Create New Contract.

- Enter the contract name in the Subject box (you don’t need to include Location or Department) and click Save.
Onboarding - client user guide

- Once saved, the **Insert Contract Sections** button will appear. Click on this and select all contract sections that should be included in this contract (you can select multiple sections at once) then click **Save** and **Close**.

- If the sections aren't in the correct order, simply click and drag them until they are in the correct order. If you need to delete a section, click the red cross on the left hand side.

- Once you are happy with the section order, click **Save**, then **Close**.
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Onboarding Set-Up

Before setting up the Onboarding Templates, there are a few sections to complete under Onboarding Setup.

These settings can be found by clicking on User > System Settings > Onboarding Setup.

Document Types

This section allows you to categorise the documents you add to the Onboarding document library. This is normally set up with one label of Onboarding, however you can add as many categories as you feel would be useful – e.g. Handbooks, Useful guidance, Policies, etc.
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Document Library

This is where you add any other documents you’d like to add to the Onboarding templates, in addition to the contracts. To add a new document to the library:

- Click on **New Document**

- Enter a document name under **Description** and a 'candidate-friendly' title under **For candidates**. Select the required **Document Category** from the drop down (these options are controlled by the Document Type section).

- Click **Choose File** to browse and select the required file from your computer, then click **Save** and **Close**

- Repeat steps until all required documents are uploaded.

*NB – there is an upload limit of 1MB per document*
Onboarding - client user guide

Onboarding Settings

This section allows you to customise the Onboarding process by confirming things like which emails are automatically triggered and which status starts the process.

<table>
<thead>
<tr>
<th>Onboarding Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding Status</td>
<td>the status that the candidate will sit at when the Onboarding process is started.</td>
</tr>
<tr>
<td>Onboarding Agreed email</td>
<td>this section is where you select the email to be sent once the candidate has agreed to an onboarding document such as offer letter or contract.</td>
</tr>
<tr>
<td>Onboarding Declined email</td>
<td>this section is where you select the email to be sent to candidates that have rejected one or more document in their onboarding template.</td>
</tr>
<tr>
<td>Onboarding Complete email</td>
<td>this section is where you select the email that should be triggered once the candidate's onboarding has been checked and marked as complete by the new starter admin.</td>
</tr>
<tr>
<td>Invalid Information email</td>
<td>this section is where you select the email to be sent if the candidate provides one or more piece of incorrect information or misses an important piece of information on a submitted document. To send this email, the recruiter marks the document as invalid, which triggers this email to the candidate.</td>
</tr>
</tbody>
</table>

Welcome to your 'Onboarding' pack.

There are several documents in the pack for you to review and accept, including your employment contract.

Please open each document in turn, read the information, close the document and then click Accept or Decline as appropriate.

If you need to decline a document for any reason please call the Recruitment Team on recruitmentteam@test.com to discuss the reasons.

To send this email, the recruiter marks the document as invalid, which triggers this email to the candidate.
Onboarding - client user guide

- **Onboarding Text** – this section allows you to add in some welcome/guidance wording for the candidates when they begin their onboarding.

The **Document(s) List** tab is where you describe each document section in the onboarding templates and add a short label for each corresponding section in the new starter Tile on the Homepage.

<table>
<thead>
<tr>
<th>No</th>
<th>Description</th>
<th>Short Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Welcome Pack</td>
<td>WP</td>
</tr>
<tr>
<td>2</td>
<td>Contract</td>
<td>T&amp;C</td>
</tr>
<tr>
<td>3</td>
<td>Personal Details Form</td>
<td>PD</td>
</tr>
<tr>
<td>4</td>
<td>Electronic Payslip form</td>
<td>BD</td>
</tr>
<tr>
<td>5</td>
<td>Starter Form</td>
<td>P46</td>
</tr>
<tr>
<td>6</td>
<td>Declaration of Interest</td>
<td>DI</td>
</tr>
<tr>
<td>7</td>
<td>Expenses Policy</td>
<td>ESP</td>
</tr>
<tr>
<td>8</td>
<td>Code of Conduct Policy</td>
<td>CC</td>
</tr>
<tr>
<td>9</td>
<td>Equality &amp; Diversity Policy</td>
<td>ED</td>
</tr>
<tr>
<td>10</td>
<td>Medical Questionnaire</td>
<td>Med</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NB** – each template can hold a maximum of 12 documents however documents can be combined to save space.

**Tip:**
Where possible, try to add more generic titles that will be relevant to all onboarding templates - for instance if some templates will have contracts and others will have offer letters and contracts combined, title the section as offer letter/contract. This will then save on using an additional section if a user has lots of documents to add to each template.
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Onboarding Forms

Online Onboarding Forms allow you to build forms that candidates can complete online, rather than downloading a copy, completing, and re-uploading to their onboarding pack.

To create a new Onboarding Form;

- Select New Form in the actions menu. Enter a form name and guidance instructions to help the candidate complete – these will appear at the top of the page for candidates. Once complete, click Save.

**NB - like other aspects of the candidate site, the colour, font, style etc. of the text will be determined by the branding of your candidate site, so if you are copying and pasting text from elsewhere, we recommended removing any formatting first to prevent any errors when displayed to candidates.**
Onboarding - client user guide

- An additional **Questions** tab will appear. As in standard assessment forms, there are a number of actions available to you;

  - **Reorder** - will sort the questions by their question numbers
  - **Matrix question** – lets you create a new matrix question e.g. to ask candidates their availability to work on different days of the week, or their uniform size.

<table>
<thead>
<tr>
<th>Quantity Required</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shirt (up to 9)</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Skirt or Dress (up to 2*)</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Trousers (up to 2*)</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Jacket (1 allowed)</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Tie (1 allowed)</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Soft Shell Jacket (1 allowed)</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
</tbody>
</table>

- **New Question** - creates a new question in one of the below formats;
  - **Multi-Choice (One Answer)** - Presents a radio button against each option, however the candidate is only able to choose one response.
  - **Multi-Choice (More than one answer)** - Presents the options with a checkbox against each. The candidate can select as many answers as they wish.
  - **Order of Preference** - Present the options with a small entry field against each option, where the candidate can enter a numerical value to rank the selections.
  - **Free Text** - A large free text field, with no word limit
  - **Short Text** - A smaller free text field, with a character limit of X
  - **Section-Header** - Inserts a heading.
Onboarding - client user guide

- **Instructions** - Inserts text instructions
- **Date** - A calendar dd/mm/yyyy field, with a calendar picker for the candidate to use.

- Enter the question text and choose if the question is mandatory or not and click Save.
- If the question is a multiple-choice question, add in the options on the **Options** tab then click *Save* again.

<table>
<thead>
<tr>
<th>No.</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>2</td>
<td>No</td>
</tr>
</tbody>
</table>

Add as many questions and text instructions as required then click *Save* and close your completed Onboarding Form.

**Tip:**
Remember to use the Preview button to see how the form will appear to candidates.
Onboarding Templates

The final step to set up Onboarding for a client is to create the onboarding templates.

- Select New Template from the left-hand menu.

- Give the template a name and click Save. Once the page loads, all onboarding sections will appear.
Onboarding - client user guide

- To add contracts, click Add on the Contract column, select the correct contract and click OK.

Lookup Contracts

<table>
<thead>
<tr>
<th>Contract</th>
<th>Location</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Starter Contract</td>
<td></td>
<td>03/05/2017</td>
</tr>
<tr>
<td>New Starter Contract</td>
<td></td>
<td>03/05/2017</td>
</tr>
<tr>
<td>Regular One Month Contract Template</td>
<td>Swansea</td>
<td>09/03/2015</td>
</tr>
<tr>
<td>Standard Contract - Manager</td>
<td></td>
<td>16/02/2015</td>
</tr>
</tbody>
</table>

- To add other onboarding documents, click Add on the Document column, select the correct document and click OK.

Lookup Values: Documents Library

<table>
<thead>
<tr>
<th>Description</th>
<th>Type</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declaration of Interests Policy</td>
<td>Declaration of Interests Policy</td>
<td>2017-05-08T09:45:50.12-01:00</td>
</tr>
<tr>
<td>Equality &amp; Diversity Policy</td>
<td>Equality &amp; Diversity Policy</td>
<td>2017-05-08T09:45:61.63-01:00</td>
</tr>
<tr>
<td>Guidance</td>
<td>Guidance</td>
<td>2014-03-13T14:20:19.84-00:00</td>
</tr>
<tr>
<td>Medical Questionnaire</td>
<td>Medical Questionnaire</td>
<td>2016-05-12T14:58:42.32-01:00</td>
</tr>
<tr>
<td>New Onboarding Document</td>
<td>Onboarding Document to Read</td>
<td>2017-05-04T11:01:34.733+01:00</td>
</tr>
<tr>
<td>Offer Letter</td>
<td>Offer Letter</td>
<td>2014-03-13T13:47:00.863+00:00</td>
</tr>
<tr>
<td>P46</td>
<td>P46</td>
<td>2014-03-13T13:53:04.057+00:00</td>
</tr>
<tr>
<td>Personal Details</td>
<td>Personal Details</td>
<td>2014-03-13T13:50:41.6+00:00</td>
</tr>
<tr>
<td>Welcome Note</td>
<td>Welcome Notes</td>
<td>2014-03-13T13:07:32.563+00:00</td>
</tr>
<tr>
<td>Welcome Pack</td>
<td>Welcome Pack</td>
<td>2017-05-08T09:45:15.723+01:00</td>
</tr>
</tbody>
</table>

- As you add a document to the template, the title of the document will appear in the second Document/Contract column. If the candidate needs to download/upload the document, tick the Upload box next to that document.

Onboarding template settings
Onboarding - client user guide

- To add an onboarding form, click **Add** on the **Onboarding Forms** column, select the correct document and click **OK**.

  ![Onboarding Form Lookup](image)

  **Select Form Name**
  - Emergency Contact Details

- Once you have added everything you need into your onboarding template, click **Save** and **Close**.

**NB:**
*You cannot delete a document once added – if this happens, either click 'Add' again and select the correct contract/document or (if nothing should be added in that section), delete the template and start again.*
Automated Referencing

The Online referencing feature comes as standard as part of the Onboarding module – it allows users to collect references via an online portal, either at the same time as or separate to the onboarding process.

When the process is started, a referee receives an email containing randomly-generated log-in details which asks them to log into a separate referencing portal and complete a bespoke online reference form for the chosen candidate. Once they have submitted this reference, the log-in details expire and can no longer be used.

Please speak to your Client Success Manager or Implementation Manager for further support or advice on implementing the referencing functionality.
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Onboarding Process
Completing the Starter Form

- Click on the candidate list.
- Tick the box next to the candidate that you would like to start onboarding for and click the New Starter Form button on the left-hand side.

- Complete all required information on the new starter form, then click Save and Close.
Onboarding - client user guide

- Keeping the box ticked against the candidate, click the Start Onboarding button on the left-hand side.

- You will be presented with these 3 options:
  - Start Onboarding & References
  - Start Onboarding
  - Start References

- Each option will be covered in turn on the following pages.
Onboarding - client user guide

Start Onboarding & References

- Click on Start Onboarding & References and a setup box will appear - complete the sections as below;

<table>
<thead>
<tr>
<th>To</th>
<th>Julie Dunning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding Template</td>
<td>Internal Offer</td>
</tr>
<tr>
<td>New Starter Admin</td>
<td>Demo Manager</td>
</tr>
</tbody>
</table>

Please select the Email and Reference templates below.

- Email for Referees: Reference Request / Reference Request
- Select References Form: Reference Form /
- New Reference Admin: Demo / Manager

- **Onboarding Template** - select the correct Template role from the drop down.

- **New starter Admin** – select a user from within the look up field. This will show the candidate's onboarding progress in that user's **New Starters tile**, so they can easily track their progress.

  *NB - Usually, superusers are set to see all new starters in the new starter tile*

- **Email for Referees** – choose the relevant template email from the lookup field.

  *NB – when creating email templates for this, is important to include the correct tags, as the referee login, username and password are generated using them – for guidance, please see the example email template at the end of the document.*

- **Select References Form** - this is where you choose the online form the referee will complete.

- **New Reference Admin** – as with the new starter admin, adding a user here will show the candidate's reference progress in their **My References tile** on the dashboard.
Onboarding - client user guide

- Once all fields are completed, click **Save & Continue**
- The next page will show a list of the reference contacts the candidate has provided – select which referees you would like to send references out to by ticking the box above the referee information.

- Once you have selected all required referees, click **Save & Continue**.

- The next page shows you the Onboarding template content - if required, it's possible to preview and replace documents/contracts, as well as edit the contract content using the buttons under each of the documents.

- Once you have made any changes required, tick the box next to **Start onboarding for this candidate**, then click **Save & Continue**.
Onboarding - client user guide

- The candidate’s status will automatically change to the one assigned in Onboarding settings.

Start Onboarding

- Click on Start Onboarding and a setup box will appear - complete the sections as below;

- **Onboarding Template** - select the correct Template role from the drop down.

- **New starter Admin** – select a user from within the look up field. This will show the candidate's onboarding progress in that user's New Starters tile, so they can easily track their progress.

  *NB: Superusers are usually set to see all new starters in the new starter tile, regardless of being added as new starter admin.*

- Once all fields are completed, click **Save & Continue**
Onboarding - client user guide

- The next page shows you the Onboarding template content - if required, it’s possible to preview and replace documents/contracts, as well as edit the contract content using the buttons under each of the documents.

Once you have made any changes required, click **Save & Continue** to start the onboarding process.

*NB: The candidate's status will automatically change to the one assigned in Onboarding settings*
Onboarding - client user guide

Start References

This option starts the references process without starting onboarding at the same time.

- Click Start References and a setup box will appear - complete the sections as below;

![References Setup](image)

- **Email for Referees** – choose the relevant template email from the lookup field.
  
  *NB – when creating email templates for this, is important to include the correct tags, as the referee login, username and password are generated using them – for guidance, please see the example email template at the end of the document.*

- **Select References Form** - this is where you choose the online form the referee will complete.

- **New Reference Admin** – as with the new starter admin, adding a user here will show the candidate's reference progress in their My References tile on the dashboard.

- Once all fields are completed, click **Save & Continue**.

- The next page will show a list of the reference contacts the candidate has provided – select which referees you would like to send references out to by ticking the box against **Send reference email to this Referee** above the referee information.
There is also a 'Do you give permission to take up this reference prior to an offer of employment being made?' question. If this question is asked in the application form, then the candidate's answer will be displayed here – please note, if you do not include this question in your application, then the Yes/No answer box will be blank.

NB – you can change the wording of this question to display differently to candidates however these changes will not be reflected on this screen.

Once you have selected all required referees, click Save & Continue.
Candidate Experience

- When the candidate receives notification to complete their onboarding, they log into the system as a returning candidate.

- When they log in, they will be able to see the link to access their onboarding documents against the job application.
Onboarding - client user guide

- Clicking on this link will take them through to their personalised documents, where they can view each document, then either download, complete and (if necessary) upload, or agree to or decline the document depending on what that document requires.

Onboarding documents

Congratulations on being offered a role with us!
You'll find your Offer Pack below, which includes your offer letter and contract.

What to do next...
Please click on each of the sections below and then read and review your offer letter and contract.
You don't need to print your contract and sign it - when you click on the 'Agree' button, this will record your acceptance electronically. You do have the option to 'Decline' any section.

If you need any help...
with questions about the offer details and forms please get in touch via CLIENT CONTACT
with technical questions about completing your offer pack, please give us a call on 01611 850 2004 or by email <br> nominee@pension.co.uk

Welcome to your 'Onboarding' pack.
There are xx documents in the pack for you to review and accept, including your employment contract.
Please open each document in turn, read the information, close the document and then click Accept or Decline as appropriate.
If you need to decline a document for any reason please call the Recruitment Team on 0161 xxx xxxxx to discuss the reasons.

If a candidate needs to agree to a document, clicking Agree will take them through to the Onboarding Agreed page where they will be able to either type in a stylised signature or sign free hand (NB – this works best on touch-screen devices)
NB: When a candidate accepts/declines, the system also adds a time/date stamp, which is visible from the client and candidate side.

Managing a Candidate’s Onboarding

For users with access to this functionality, the New Starters and My References tiles are a quick and easy way to track a candidate's onboarding progress.

**New Starters**

- The table will show all new starters you have been assigned to as new starter admin (superusers can typically see all new starters, regardless of whether they are assigned as admin) and their progress at each stage.
Onboarding - client user guide

- Within this page, you can also view the completed New Starter Form against each candidate and send them an email or text message.

<table>
<thead>
<tr>
<th>Offer Date</th>
<th>Start Date</th>
<th>Candidate</th>
<th>References</th>
<th>WP</th>
<th>TSC</th>
<th>PD</th>
<th>ES</th>
<th>DI</th>
<th>ESP</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/05/2017</td>
<td></td>
<td>Helen Teafuto</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29/05/2014</td>
<td>15/12/2014</td>
<td>Giese Hochstett-Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24/08/2015</td>
<td>28/09/2015</td>
<td>Clara Ryker</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17/02/2016</td>
<td>14/02/2016</td>
<td>Vicki Owens</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18/02/2016</td>
<td>23/02/2016</td>
<td>Laura Chambers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- There are several symbols in this section to highlight the progress of each candidate against each document - each symbol is explained below;

  - This symbol means that the candidate has agreed to the terms of this document (or all references have been returned).

  - This symbol shows that the candidate has declined this document.

  - This symbol shows that the candidate has downloaded the document.

  - This symbol shows that the candidate has re-uploaded the completed document.

  - This means that one or more reference has been returned but you are still awaiting the rest.

  - This means that you have sent references out but are still to receive them back from the referees.

- Clicking on the candidate’s name allows you will be able to see a more detailed view of the onboarding information sent to the candidate and what areas are still outstanding. Any documents that have been completed and re-uploaded can be viewed here.
Onboarding - client user guide

Onboarding Contracts / Documents

Bradley Smith

Candidate Application Details For [MAN-00082 / Customer Support Manager]

Onboarding Contracts / Documents

Reset Onboarding Template

<table>
<thead>
<tr>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aga Proofing</td>
<td></td>
</tr>
<tr>
<td>01/02/2019</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>File Name</td>
<td>Age Proofing Your Organisation.doc</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Age Proofing</td>
</tr>
<tr>
<td>01/02/2019</td>
<td>01/02/2019</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>File Name</td>
<td>Age Proofing Your Organisation.doc</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NB: if you need to reset the candidate’s onboarding (for instance if they have been sent the incorrect information), you can do this by clicking the Reset Onboarding Template – please note, all existing onboarding information will be lost if you do this.

- Once all onboarding has been completed and the recruiter has checked that they have everything they need from the candidate, they can tick next to the candidate’s name and click the Onboarding Complete button – this removes the candidate from the onboarding tile, and sends them the onboarding complete email (set in onboarding settings).
Within this tile it is possible to track the progress of references for each listed candidate, and to filter this list down by the System Users assigned to look after the monitoring of a candidate’s references.

Click View if you wish to view the candidate’s details within the original candidate listing against the job record. This is required if you wish to reset or send additional references.
Onboarding - client user guide

- Click a Candidate's name to see the specific reference details gathered.

### Onboarding References

<table>
<thead>
<tr>
<th>Email Sent</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Sent On</td>
<td>04/03/2019</td>
</tr>
<tr>
<td>Email Subject</td>
<td>Reference Request</td>
</tr>
<tr>
<td>Created On</td>
<td>04/03/2019</td>
</tr>
<tr>
<td>Last Accessed On</td>
<td>04/03/2019</td>
</tr>
<tr>
<td>Reference Completed/Decline</td>
<td>Agreed</td>
</tr>
<tr>
<td>Reference Completed/Decline On</td>
<td>04/03/2019</td>
</tr>
<tr>
<td>Signature</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment Referee</th>
<th>h</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer</td>
<td>Jobrain</td>
</tr>
<tr>
<td>Position</td>
<td>Tester</td>
</tr>
<tr>
<td>Address</td>
<td>h</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>h</td>
</tr>
<tr>
<td>City/Town</td>
<td>h</td>
</tr>
<tr>
<td>County</td>
<td>h</td>
</tr>
<tr>
<td>Country</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>Postcode</td>
<td>h</td>
</tr>
<tr>
<td>Telephone</td>
<td>07240072901</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:test@test.co.uk">test@test.co.uk</a></td>
</tr>
<tr>
<td>FAX</td>
<td></td>
</tr>
<tr>
<td>Relation</td>
<td></td>
</tr>
</tbody>
</table>
Onboarding - client user guide

Viewing Information within a Candidate Record

Within Onboarding/References tab there are two sub-tabs: Onboarding Contracts Documents and Onboarding Reference - click to display relevant data.

- The first sub-tab Onboarding Contracts / Documents displays all onboarding information.

- The second sub-tab Onboarding References displays referee information and status:
Onboarding - client user guide

- **Add Reference**: This will either allow you to add additional referees that may have been supplied at a later date, e.g. if a candidate has provided an alternative referee directly to you, you can add the referee to the candidate’s record providing you have permission to do so. Alternatively, you are able to email referees that have not previously been contacted.

- **Reset All References**: This will restart the reference process for all referees provided.

- **Send Reminder**: This allows you to send an email reminder to the referee (using either an email template or bespoke email).

  *N.B.: The reminder does not re-set or re-send password details – it’s simply a prompt to login and complete the reference.*
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Viewing and Completing as a Referee

The referee portal is branded in line with your own candidate site.

When the referee follows the link they are presented with they will initially be required to log-in with the details provided in their email.

Once logged in, they will be presented with a welcome message.

Please note: this request must be completed in one single session and the password is valid for a single use only.
Onboarding - client user guide

When the referee clicks on **Continue to Reference Form** the reference form selected will be displayed. Once all fields have been completed, the referee will be required to sign the declaration (text or free hand) and click **Save and Continue**.

**Signature Type (Text / Free hand)**

Signature

Should the referee click the **Decline** button, they will be asked to provide a reason for declining to provide a reference.

Please enter your reason for not providing a reference

**Candidate**
**Jobtrain Candidate**

**Role applied for**
**Jobtrain Go Live Checks client / CAX-000002**

Reason

[Back] [Save and exit]
Onboarding - client user guide

This will clearly be displayed when viewing the candidate's record/onboarding references.

<table>
<thead>
<tr>
<th>Reference</th>
<th>Date</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13/02/2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>30/11/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Jobtrain Candidate</td>
<td></td>
</tr>
</tbody>
</table>
Example Email Template

It is important to use the correct merge fields as the username and password are generated to the referees as highlighted in red below. Example wording is below:

```
Dear {CANDIDATEREFERENCES.REF_NAME} {CANDIDATEREFERENCES.REF_LASTNAME},

We are considering {CANDIDATES.FIRSTNAME} {CANDIDATES.LASTNAME} for the {JOBS.JOBTITLEFORCANDIDATES} position with us. They have given permission for us to contact you and request a reference.

Please follow the instructions below to complete a short online reference in support of this application. Please note - this request must be completed in one single session and the password is valid for a single use only

Step 1 – To open the online reference request form click here (TIP: URL behind the link is https://clienturl/ReferenceForm/Login.aspx)

Step 2 – Enter the email address and password provided below;

Email Address  <<<USERNAME>>>
Password  <<<PASSWORD>>>

Step 3 - complete and submit the request and close your internet browser.

If your session is interrupted, or your password expired, please contact us on the below details. If you are unable to complete this online form, please either email or post back to us at the below details. If sending via post, please stamp the reference or enclose a company compliment slip.

Thank you in advance for taking the time to complete this reference request.

Kind Regards,

CLIENT NAME/DETAILS
```
Onboarding - client user guide

FAQs

Is there a limit to how many references can be sent out?

You can send as many references out as you require (from the list that the candidate has provided).

Can I send out a reference reminder email to referees?

There is no functionality to send out reminders. You can either resend references, or you can use the manual reference request option found under ‘Send Email’ in the candidate listing or candidate record to send a reminder. You would need to make a reference reminder email using the correct merge fields.

What if I need to amend or add referee details?

You are able to edit or add new referee details (for example, if a candidate has supplied information or alternatives at a later date) to the original application form for the relevant candidate.

Have any further questions?

The Support Team or your Client Success Manager will be happy to help answer any further queries.

Tel: +44 (0) 161 850 2004