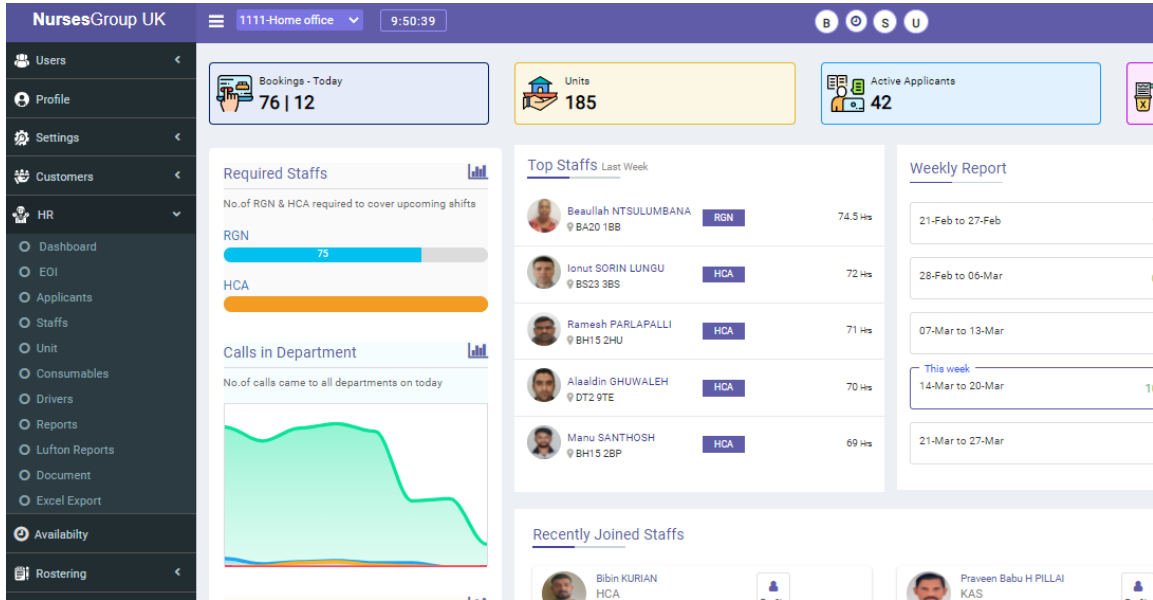


## REFERENCE PORTAL

Reference for a job application are professional and personal contacts who can verify your character, skills, and experience. And this part of **NSG CRM** software is used to add the reference details of the job applicant. User can access the **Reference** page using following steps.

1. First click on the menu button seen on the top left of the page. This will expand and user can see a set of items listed in the menu.



2. Then click on the **HR** tab, this will slide down and appear sub menu items. Here you need to click on the **Applicant** tab, this will redirect user to **Applicants** page.

The screenshot shows the Applicants page with a table of 14 applicants. Each row includes columns for No, Forname, Code, Priority, Category, Email, Mobile, Log Book, Branch, Created At, and Actions. The Actions column contains buttons for Log Book, RTW, OBS, RFR, and C. The RFR buttons are color-coded: green for fully filled, orange for partially filled, and red for not filled.

No	Forname	Code	Priority	Category	Email	Mobile	Log Book	Branch	Created At	Actions
1	Ambrose YENDEMU	NSG1642	Low	RGN	demaumbrose@gmail.com	07752340062	Log Book	Poole	15-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
2	Ayodeji ORIMOLADE	NSG1616	Low	HCA	ayodejiorimolade@gmail.com	07943636105	Log Book		01-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
3	Carla Sofia CARDOSO	NSG1624	Low	HCA	carlasofagomescardoso@gmail.com	07719848615	Log Book		05-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
4	Destiny OSADEBAMWEN	NSG1622	Low	RGN	desydebs@gmail.com	07869995595	Log Book	Yeovil - O	09-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
5	Donna KEATES	NSG1598	Low	HCA	donnakeates07@gmail.com	07917355490	Log Book		08-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
6	Gbolahan AKINLOSOTU	NSG1640	Low	HCA	gbolahanakinlosotu@gmail.com	07785291493	Log Book		14-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
7	Ioana Cristina BALAC	NSG1605	Low	HCA	ioana.balac17@icloud.com	07546821124	Log Book	Yeovil - O	30-Aug-2021	[Log Book] [RTW] [OBS] [RFR] [C]
8	Jaimba NDURE	NSG1639	Low	HCA	jaimbandure@gmail.com	07957383552	Log Book		13-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
9	Jean TAYLOR	NSG1644	Low	HCA	cleaverjean20@gmail.com	07561368833	Log Book		17-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
10	Jeremiah THOMAS	NSG1501	Low	HCA	jeremiahthomas002@gmail.com	07780353834	Log Book	Yeovil - O	13-Jul-2021	[Log Book] [RTW] [OBS] [RFR] [C]
11	Mitchell WILLS	NSG1627	Low	HCA	Mitchellwills26@gmail.com	07399767115	Log Book	Poole	17-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
12	Rozika STANESCU	NSG1577	Low	HCA	stanescu.rozica@gmail.com	07459665420	Log Book		17-Aug-2021	[Log Book] [RTW] [OBS] [RFR] [C]
13	Shanice WRIGHT	NSG1631	Low	HCA	Shanicewright1999@gmail.com	07737603844	Log Book	Yeovil - O	15-Sep-2021	[Log Book] [RTW] [OBS] [RFR] [C]
14	Yetunde Adefila	NSG1576	Low	HCA	adefila_ey@gmail.com	07856004598	Log Book		18-Aug-2021	[Log Book] [RTW] [OBS] [RFR] [C]

3. Now click the **RFR** button for manage the reference details of the applicant. This will redirect user to **Reference** page. And **RFR** button seen in **Applicants** page was colour coded according to the amount of data entered.



If the reference details are fully filled, then the button will be appeared in **green** colour.



If the reference details are partially filled, then the button will be appeared in **orange** colour.



If the reference details are not filled, then the button will be appeared in **red** colour.

Sl.No	Name of Referee	Relation/Designation	Reference Type	Draft Preview	Log	Edit	Delete	Status	Download
1	Mr. Paul HEYDON	Your relation	Character reference	<a href="#">Draft preview</a>	<a href="#">Log details</a>				
1	Mr. Paul HEYDON	Your relation	Work reference	<a href="#">Draft preview</a>	<a href="#">Log details</a>			<a href="#">Email Sent</a> <a href="#">Response</a>	<a href="#">Download</a>
1	Mr. Paul HEYDON	Your relation	Character reference	<a href="#">Draft preview</a>	<a href="#">Log details</a>			<a href="#">Email Sent</a> <a href="#">Response</a>	<a href="#">Download</a>
1	Mr. Paul HEYDON	Your relation	Work reference	<a href="#">Draft preview</a>	<a href="#">Log details</a>			<a href="#">Email Sent</a> <a href="#">Response</a>	<a href="#">Download</a>

4. In this page you have options to add, edit, delete the reference, and can view the details of reference added.
5. Click on the **Add Reference** button seen on the top right corner of the page. A pop-up screen appears which contains options to add both work & character reference of the applicant.
  - a) Work Reference

- Default pop-up screen will be for Work Reference.

- Here user can add the details of work reference of the applicant in the following fields,
  - Name of the Referee : Field to enter the name of the referred person.
  - Designation : Field to enter the designation of the referred person.
  - Work Address : Field to enter the office address of the referred person.
  - Telephone Number : Field to enter the telephone number of the referred person.
  - Email : Field to enter the email id of the referred person.
  - Fax : Field to enter the fax number of the referred person.
  - Mobile No. : Field to enter the mobile number of the referred person.
  - Website : Field to enter the company website address.
  - Position of Applicant in the company : Field to enter the position of applicant in the company.
  - Start/End Date : User can select the start and end date of employment using the available date pickers
  - Reason for leaving : Field is used to mention the reason for leaving the company.
- Fill the above explained fields the click on the **Save** button, this will save the entered details and redirect us to **Reference** page. Where user can view the details of reference added.
- You can close the pop-up screen by click on the **Close** button.

b) Character Reference

- Click on the **Character Reference** tab in the pop-up screen to add the reference details of the person who can explain the character of the applicant.

ADD REFERENCE

Work Reference | **Character Reference**

Name of Referee:

Relation to Applicant:

Referees Address:

Telephone Number:

Email:

Fax:

Mobile:

How long have you known the referee:

Save Close

- User can enter the details in the available fields.
  - Then click on the **Save** button, will save the details and redirect user to **Reference** page.
6. In **Reference** page user can view list of both character and work reference already added with options to send emails and to download the email response.
7. Details include the following,
- a) Name of referee.
  - b) Relation/designation of referee with the applicant.
  - c) Reference type – Character/Work reference.
  - d) Log – details of who added the reference details.
8. Functions in this page are explained below,
- a) Draft Preview button **Draft preview**
    - Click the **Draft Preview** button, a pop-up screen appears where user can send the email regarding reference of the applicant to referred person for verification of reference details given by the applicant.

Draft Preview

Dear Manager\_Name,

ELENA CHITESCU (Mid=836541) has applied to work for Nurses Group in our Yeovil branch and has given your name as a referee. Please complete the reference online by visiting our secure referencing site here: [LINK](#)

We have been providing exceptional healthcare services since 1996 and we pride ourselves on our track record for recruiting, training and supporting the very best nurses and healthcare staff.

Our staff are all carefully selected, permanent employees who are placed on a temporary basis in a wide range of care environments. Nurses Group help to make a positive difference in the nursing homes, residential homes, surgeries, clinics and within the homes of service users.

ELENA CHITESCU will be asked to work on various assignments. They will be providing care appropriate to thier grade and experience. They will be expected to behave in a professional manner at all times, be able to work as a member of a team and be adaptable in different environments.

Alternatively, we can accept verbal references on 0117 446 0151.


We would appreciate it if you could respond at your earliest convenience.

Thank you for your input on this matter.

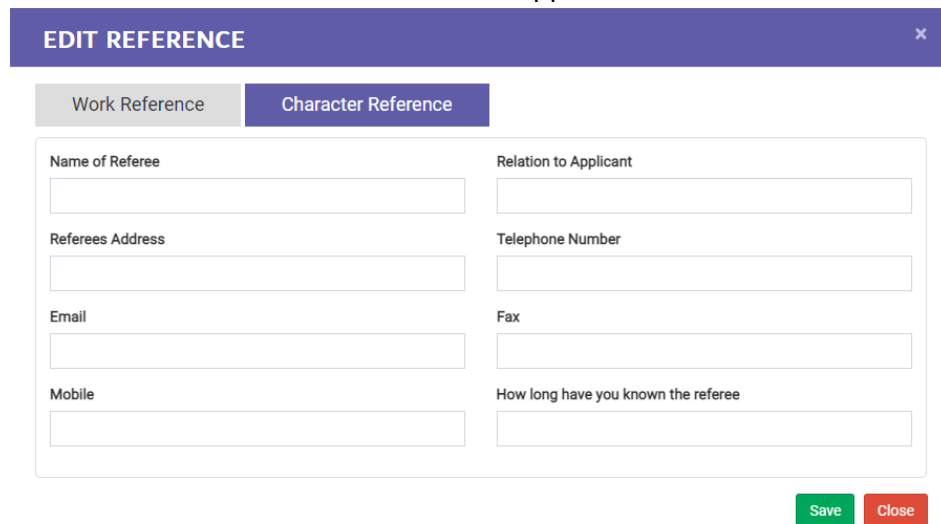
Kind regards,  
HR  
Nurses Group

Send Edit


- In this pop-up screen user can view a predefined message which is editable. And you can edit the message by click on the **Edit** button seen on the bottom of the pop-up screen.
- Email content include a **link** which helps to connect with the **reference portal** of Nurses Group to fill the form regarding applicant's reference verification.
- Click on the **Send** button which will send the email content to the referred person's email and close the pop-up screen and direct user back to **Reference** page. This will reflect the colour of the **Email Sent** icon to **green**.

b) Edit button 

- Click on the Edit button, a pop-up screen appears which is editable. Here user can edit all the previously entered reference details related to the applicant.



- Then click on the Save button to store the details.

c) Delete button 

- This button helps user to delete the created/added reference. Click on this button, a pop-up screen appears.

Are you sure want to delete it ?



- Click on **Yes** button to delete else click **Cancel** button.

d) Status

- Here user can view two statuses.
- Email Sent icon  
If you sent email to the referred person, then the icon colour changes from **grey** to **green** colour with a **tick** mark on the icon.
- Respond icon  
If you get the response back from the referred person, this will automatically reflect on the NSG CRM software by changing with colour of icon from **grey** to **green** colour with a **tick** mark on the icon.

e) Download button

- Click this button to download the response about the applicant given by the referred person.