

## How to Use the Reference Check Tool

This job aid provides guidance on using the Reference Check tool within TalentLink.

The TalentLink Reference Check tool is enabled through the recruitment process. We have created forms with specific questions for various roles that you can deploy to a candidate's references concurrent with other steps of the recruitment process. While this is an optional tool, it is highly recommended, as we are mandated to have completed reference checks for all finalists.

- You can check references for your finalist concurrently with the Education and Employment Verification.
- You can also request references for multiple candidates simultaneously.

**All references must be completed and reviewed before extending a verbal or written offer of employment**

### Initiating reference checks for one applicant

1. Log in to [my.columbia.edu](https://my.columbia.edu); under the HR Manager Resources tab, select "TalentLink."
2. From your dashboard, select the requisition.
3. Click on the applicant process board to view all applicant tiles.
4. You can initiate a reference check for one or multiple applicants.
5. Select the green button on one, or more applicant cards.
6. In the Bulk actions bar at the bottom of the page, select "Bulk Reference Check".

The screenshot displays the TalentLink interface for a requisition titled "520005 - TEST CASUAL". The interface includes a top navigation bar with "Requisitions", "People", "Reports", "Settings", and "Recent items". Below the navigation bar, the requisition details show "Job status: Interviewing" and "Owner: Brendan Feifer".

The main content area displays a grid of applicant tiles. On the left, there are "Quick filters" and "Application status" sections. The "Quick filters" section includes checkboxes for "Statuses with Applications", "Shortlisted Applicants", "Current Application Statuses", "Internal Applications", and "Flags". The "Application status" section includes checkboxes for "Unsorted applications (0)", "Application Incomplete (0)", "Application Submitted (0)", "New (1)", and "Does Not Meet Minimum Requireme... (0)".

The applicant tiles are organized into two columns: "New (1)" and "Interview (2)". Each tile shows the applicant's name, location, and application details. Red arrows point to the green "Progress" button on the "Test Test" tile in the "New (1)" column and the "Test-DW Test" tile in the "Interview (2)" column.

A bulk actions menu is open, showing options such as "Bulk export", "Bulk invite to apply", "Bulk move and send", "Bulk reference check" (circled in red), "Bulk send", and "Bulk task/reminder". A red arrow points to the "Bulk reference check" option.

At the bottom of the interface, the "Bulk Actions" bar shows "3 selected" and "1 selected". A red arrow points to the "3 selected" status.

7. Enter the due date you expect the references to be complete by.
8. Select the appropriate reference form.


**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\*  

Please select the form you would like the reference to complete:

Reference check form:\* 

Select

Select

Academic Affairs

Administrative Dean

Administrative Professionals

Communications / PR

Event Management

Executive Assistant

Finance Professionals (Sr. Level/People Manager)

Finance Roles (Jr. Level / Individual Contributor)

Fundraising / Development

General form: Open-ended questions

Grant Management

Human Resources

IT Professionals

Letter of Recommendation

Project Management

Support Staff Roles (Admin)

9. The reference template will be generated.

**Request reference check**

Bulk action status: 1 Applicant Complete

You are able to request reference checks from 3 references, on behalf of 1 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:\*

**B** **I** **U** **S**                                 

## Viewing the status of requested references

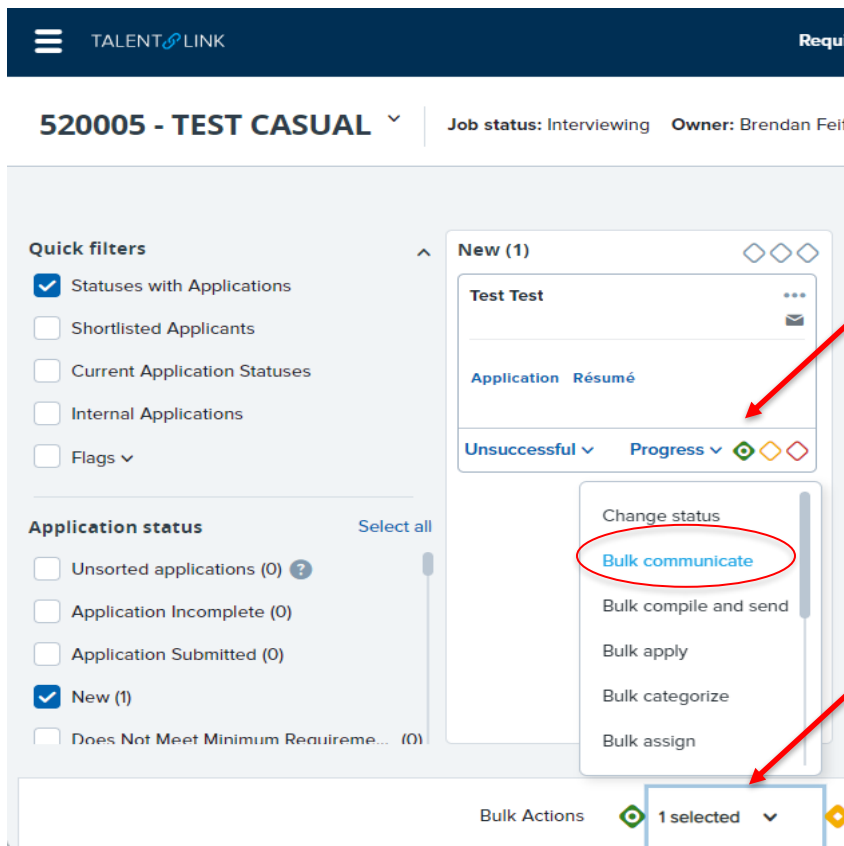
11. Navigate to the applicant card, and click on the ellipsis (...) to the right of the requisition details.
12. Scroll down, and click on "View References".

13. From the Manage References dashboard you can view, resend and check the status of the references.
  - a. The status and expiration date of the link is under "Status" and "Expiry" respectively.
  - b. To resend an invitation, click on "Resend"
  - c. To view the responses, click on "View Answers"

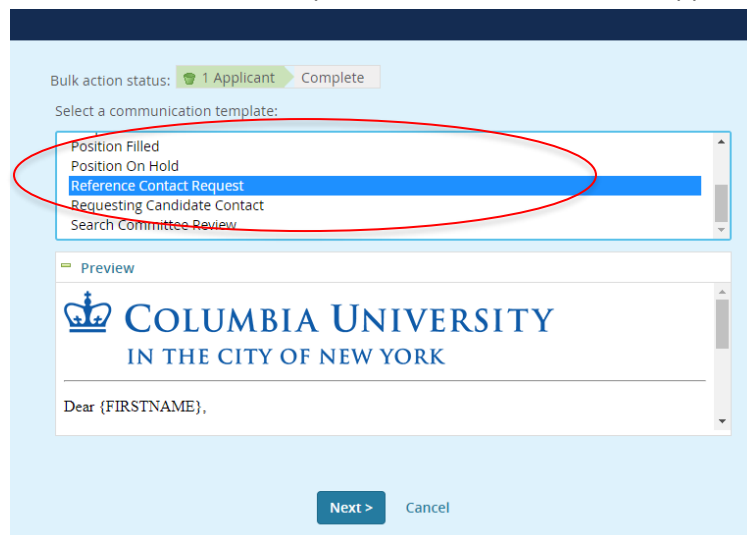
First name	Last name	Type of reference	Status	Expiry	Score	Organization	Reference Title	Phone Number	E-mail	Length of Tenure	View answers	Edit	Control	Resend	Archive
Liz	Braden	Professional	Invitation Expired	Jul 10, 2022		Columbia			emb2004@columbia.edu		View answers	Edit	Control	Resend	Archive
Test	Test		Invitation Expired	Jul 13, 2022					dw2486@columbia.edu		View answers	Edit	Control	Resend	Archive
Gina	D'Alessio		Invitation Expired	Jul 10, 2022					gd2597@columbia.edu		View answers	Edit	Control	Resend	Archive
Chris	Lee	Professional	Invitation Expired	Jul 11, 2022		Columbia University	Sr. HR Business Partner		cl48@columbia.edu		View answers	Edit	Control	Resend	Archive
Harold	Rodriguez		Invitation Expired	Jul 10, 2022					hr2338@columbia.edu		View answers	Edit	Control	Resend	Archive
Brandon	Feifer		Invitation Expired	Jul 10, 2022					bf2272@columbia.edu		View answers	Edit	Control	Resend	Archive
Ursula	Bollini	Personal	Invitation Expired	Jul 11, 2022		Columbia University Human Resources	Director, Human Resources		ub2@columbia.edu		View answers	Edit	Control	Resend	Archive

## Send applicants a request to submit the contact information of their professional references.

14. You can confirm that an applicant has entered the contact information of their references by reviewing their application. If they are incomplete, you can send a request directly from Talentlink.
15. Select the green button on one, or more applicant cards.
16. In the Bulk actions bar at the bottom of the page, select "Bulk Communicate".



17. Select "Reference Check Request", and click next.
18. A request will be sent to the candidate to complete the references on their application form.




19. You can export and save the completed reference forms and share them with members of the hiring committee.
20. Navigate to the applicant card, and click on the ellipsis (...) to the right of the requisition details.
21. Scroll down, and click on “Compile and Send”.

The screenshot shows the Talent Link interface for an applicant named 'Test-DW Test (Test DW)'. The applicant's profile is displayed with fields for Address, E-mail, Employment Status, Original source, Phone, Number, Applicant ID, and Linked Employee. Below the profile, there are tabs for Applications, History, Scheduled emails, CRM, and Resume. The Applications tab is selected, showing a list of applications. One application, '520005 - TEST CASUAL', is highlighted. To the right of this application, a dropdown menu is open, showing various actions: Communicate, Compile and send, New booking to an existing event, New booking to a new event, New task/reminder, New form, New referral, Send application, Send application and change status, and View reference. Red arrows point to the ellipsis (...) button and the 'Compile and send' option in the dropdown menu.

22. On the bulk action Status menu select “completed online reference check form” and click on “create PDF”.

The screenshot shows the 'Bulk compile' interface. At the top, it says 'Bulk action status: 1 Applicant Complete'. Below this, it says 'You have selected one applicant to compile documents for, please select the documents you would like to include.' There is a section titled 'Job Summary' with a list of checkboxes for documents to include: Applicant personal details, Application form, Additional form, New hire form, Application notes, Onboarding Form, Completed internal reference check forms, Completed phone screening forms, and Completed online reference check form. The 'Completed online reference check form' checkbox is checked. A red arrow points to this checkbox.

23. You can either download and save the .pdf, or send them via email.



**Download or send document**

Bulk action status: 1 Applicant Complete

**i** To download the document, right click on the link below and select 'Save Target As'.  
Note: To send the document it is not necessary to download the document below.  
The document will be sent as an attachment with the communication below.

Your document is ready to download:  
[Download document \(34.5 kb\)](#)

**Send document:** ☒ Yes ☐ No

User:     
No user selected.

Other e-mail: