



People and Money system

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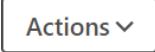
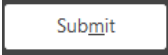
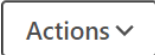
Employee Guide- How to Refer A Candidate for A Job

Employee

Estimated time to complete: 3 minutes

In Brief...

This is a simple overview of the process.

1. From the Home page, click the **Navigator**  menu on the top left icon.
1. Expand the **My Client Groups** section and click **Hiring** .
2. Then click **search**  icon to view the list of job adverts.
3. Select and view the job advert.
4. To refer an internal candidate, click **Action**  and select **Refer an Employee**.
5. In **Refer an Employee** page, find and select the employee name. Then, click **Continue**.
6. Fill in the **Referral Info** section. Then click **Submit** . The internal candidate will receive an invitation to apply notification/email.
7. To refer an external candidate, view the job advert. Click **Action**  then select **Refer a Candidate**.
8. In **Refer a Candidate** page, enter the email address. Then click **Continue**

Continue

9. In **Resume** area, use the “**Drag files here or click to add attachment**” hyperlink to upload the CV if available.

10. Fill in the referral information then click **Continue**

Continue

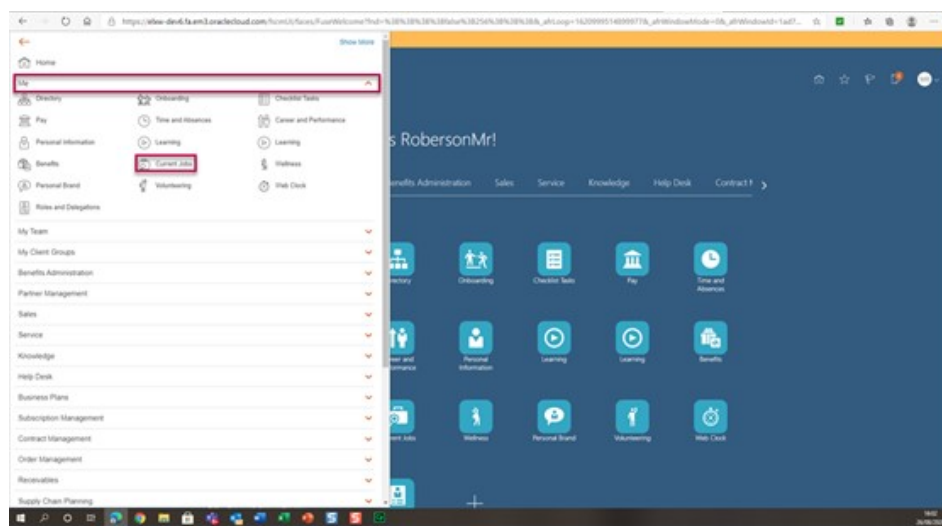
11. The external candidate will receive an invitation to apply notification/email.

For detailed guidance, see the next section.

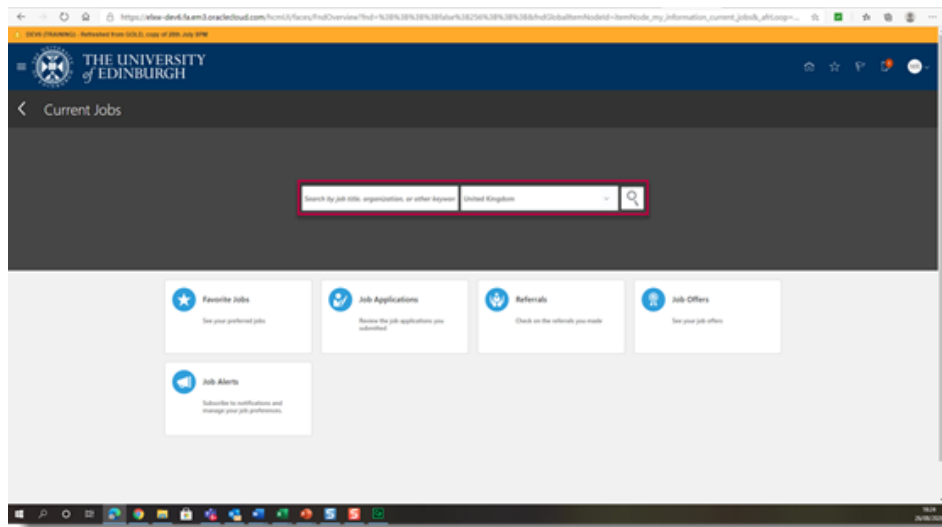
In Detail...

View Job Advert

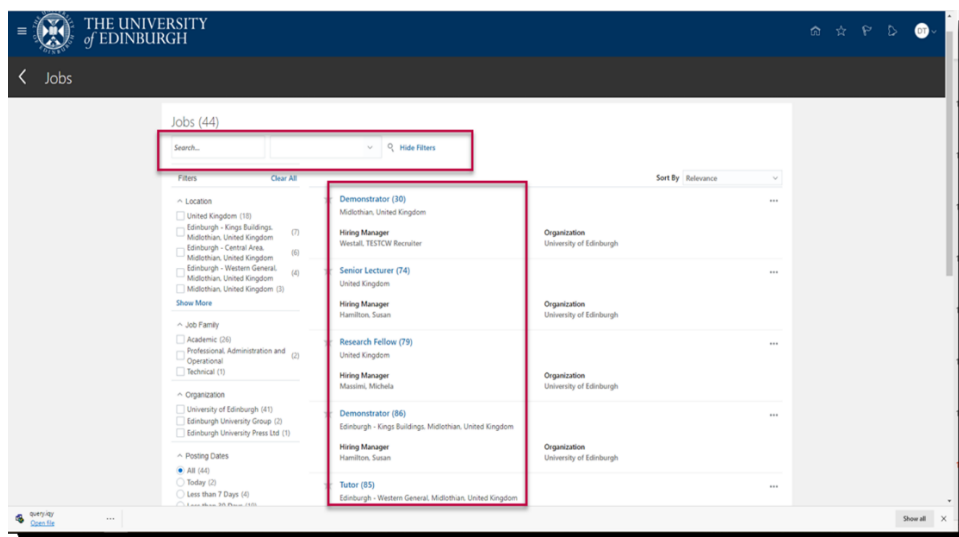
1. From the Home page, click the **Navigator** menu on the top left icon.
2. Expand the **Me** section and click **Current Jobs**.



3. Set the Search Filters to view the list of **Job Adverts**.

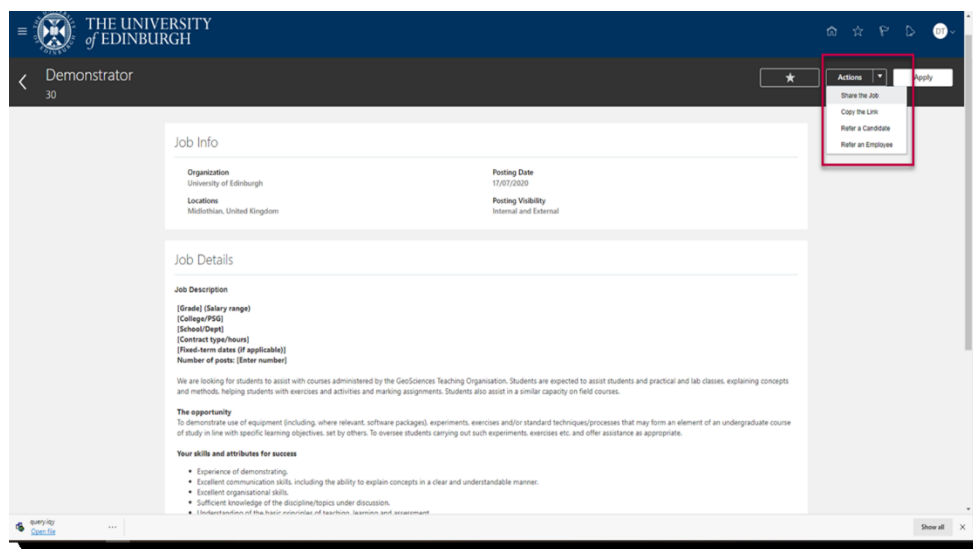


4. Select and view the **Job Advert**.

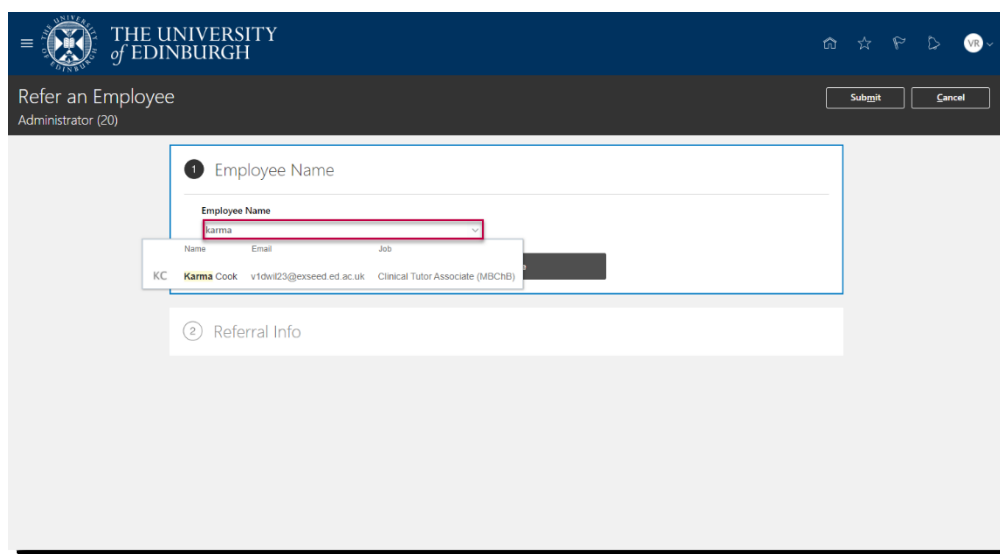


Refer Internal Candidate

1. Click **Action** and select **Refer an Employee**.



2. In **Refer an Employee** page, search for and select the employee name.



Begin typing the employee's name into the **Employee Name** field then select the correct employee from the dropdown list which appears

3. Click **Continue**.

The screenshot shows the 'Refer an Employee' form for Administrator (20) at The University of Edinburgh. The form has two main sections: 'Employee Name' and 'Referral Info'. The 'Employee Name' section is highlighted with a blue border and contains a dropdown menu with 'Karma Cook' selected. Below the dropdown is a 'Continue' button, which is highlighted with a red border. The 'Referral Info' section is currently empty and highlighted with a light blue background.

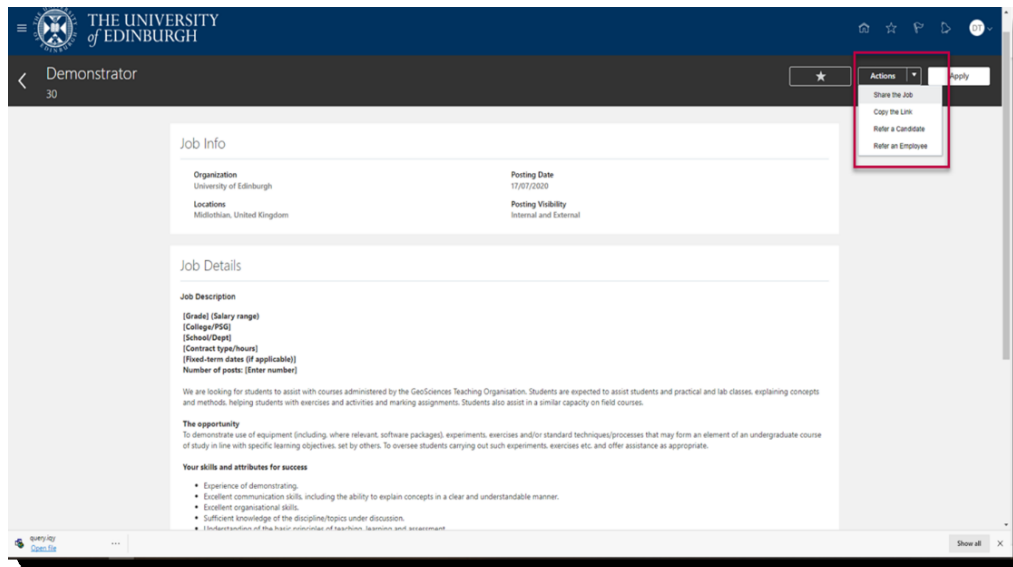
4. Fill in the **Referral Info** section then click **Submit**.

The screenshot shows the 'Refer an Employee' form for Demonstrator (30) at The University of Edinburgh. The form has two main sections: 'Employee Name' and 'Referral Info'. The 'Employee Name' section is highlighted with a light blue background and contains a dropdown menu with 'Nicola Jane Ramsey' selected. Below the dropdown is a 'Message to Candidate' text area, which is highlighted with a red border. The 'Referral Info' section is currently empty and highlighted with a light blue background. The 'Submit' button is highlighted with a red border.

5. The internal candidate will receive an invitation to apply notification/email.

Refer External Candidate

1. Click **Action** then select **Refer a Candidate**.



2. In **Refer a Candidate** page, enter the candidate's email address and click **Continue**.

A screenshot of the 'Refer a Candidate' page. The page title is 'Refer a Candidate' and the subtitle is 'Demonstrator (30)'. There are 'Submit' and 'Cancel' buttons at the top right. The page is divided into three sections: 1. 'Candidate Email', 2. 'Referral Info', and 3. 'Resume'. In the 'Candidate Email' section, there is an 'Email Address' input field and a 'Continue' button. The input field and the 'Continue' button are highlighted with red boxes. The 'Referral Info' and 'Resume' sections are currently empty.

3. In Referral Info area, enter details required:
 - a. **Last Name** – this is a mandatory field.
 - b. **First Name** – this is a mandatory field.
 - c. **Title** is a dropdown option – Select as appropriate. This is a mandatory field
 - d. **Middle Name** – as appropriate.
 - e. **Mobile Phone** – as appropriate.
 - f. **Candidate Preferred Language** is a dropdown option – Select as appropriate.

- g. **Message to Candidate** – any information added will be sent in the referral email.
- h. Click **Continue**.

4. Use the “**Drag files here or click to add attachment**” hyperlink to upload the CV if available then click **Submit**.

The external candidate will receive an invitation to apply via email.

Glossary

Please refer to the Glossary