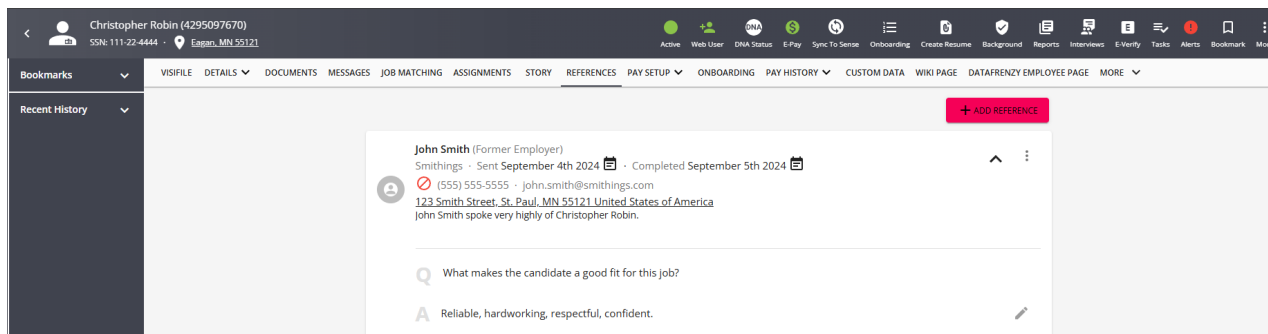


# Beyond - References

Last Modified on 09/04/2024 1:15 pm CDT

## Overview

References are able to be documented on the employee record to refer back to when you are ready to assign the employee.



**\*Note\*** References created within Enterprise after September 6th, 2024, will **not** be automatically migrated to Beyond.

Please contact your TempWorks Account Manager if you have any questions or concerns.

This article covers the following:

1. [Managing Reference Questions](#)
2. [Managing References](#)

## Managing Reference Questions

Reference questions are managed by navigating to B Menu > System Settings > Reference Questions:

Question	Status	CLEAR FILTERS X					
	Active						
Reference Questions							+
Position ↑	Question	Hierarchy	Active	Created By	Created	Last Modified	
20	Can you comment on the reliability of the candidate?	System - 1	✓	Default	Default	Default	⋮
21	What is your favorite Colour?	System - 1	✓	Matthew Mathieson	8/22/2024	8/27/2024 by Derek Sandkamp	⋮
30	Can you comment on the attitude of the candidate?	System - 1	✓	Default	Default	Default	⋮
40	Can you comment on the ability of the candidate?	System - 1	✓	Default	Default	Default	⋮
42	How would you rate their work?	High Tech Staffing - 2	✓	Emiliano Carnicero	8/21/2024	8/22/2024 by Emiliano Carnicero	⋮
42	What is your relationship with the candidate? When did you work together and for how long?	High Tech Staffing - 2	✓	Emiliano Carnicero	8/22/2024	8/22/2024 by Emiliano Carnicero	⋮
42	Could you confirm starting and ending employment dates	High Tech Staffing - 2	✓	Emiliano Carnicero	8/22/2024	8/22/2024 by Emiliano Carnicero	⋮

Rows per page: 20 1-7 of 7 < 1 >

**\*Note\*** If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Reference Questions" page and "addEditReferenceQuestion" form within Settings > System Settings to the Security Groups that require the functionality:

BY PAGE BY FIELD Selecting a parent selects children

🔍 reference questions X

^ Settings

- ^ System Settings  Access
- ^ Reference Questions Page  Access
- addEditReferenceQuestion Form  Access

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

## Adding Questions

To add a reference question, select the "+" at the top right of the "Reference Questions" page:

Question	Status	CLEAR FILTERS X					
	Active						
Reference Questions							+
Position ↑	Question	Hierarchy	Active	Created By	Created	Last Modified	
20	Can you comment on the reliability of the candidate?	System - 1	✓	Default	Default	Default	⋮
21	What is your favorite Colour?	System - 1	✓	Matthew Mathieson	8/22/2024	8/27/2024 by Derek Sandkamp	⋮
30	Can you comment on the attitude of the candidate?	System - 1	✓	Default	Default	Default	⋮
40	Can you comment on the ability of the candidate?	System - 1	✓	Default	Default	Default	⋮
42	How would you rate their work?	High Tech Staffing - 2	✓	Emiliano Carnicero	8/21/2024	8/22/2024 by Emiliano Carnicero	⋮
42	What is your relationship with the candidate? When did you work together and for how long?	High Tech Staffing - 2	✓	Emiliano Carnicero	8/22/2024	8/22/2024 by Emiliano Carnicero	⋮
42	Could you confirm starting and ending employment dates	High Tech Staffing - 2	✓	Emiliano Carnicero	8/22/2024	8/22/2024 by Emiliano Carnicero	⋮

Rows per page: 20 1-7 of 7 < 1 >

Within the "Add Reference Question" window, enter a question and select the appropriate position the question should appear when completing the reference form on the employee record:

### Add Reference Question

\* Question

What makes the candidate a good fit for this job?

---

Position

1

---

CANCEL SUBMIT

Once complete, select "Submit" to create the question:

### Add Reference Question

\* Question

What makes the candidate a good fit for this job?

---

Position

1

---

CANCEL **SUBMIT**

## Editing Questions

To edit a reference question, select the  icon to the right of the question and select "Edit":

Position ↑	Question	Hierarchy	Active	Created By	Created	Last Modified	
1	What makes the candidate a good fit for this job?	High Tech Staffing - 2		joshua.kramer	9/4/2024	9/4/2024 by joshua.kramer	
20	Can you comment on the reliability of the candidate?	System - 1		Default	Default	Default	Edit
21	What is your favorite Colour?	System - 1		Matthew Mathieson	8/22/2024	8/27/2024 by Derek Sandkamp	Deactivate

Update the question and/or position and, once complete, select "Submit":

### Edit Reference Question

\* Question

What makes the candidate a good fit for this job?

---

Position

5

---

CANCEL **SUBMIT**

**\*Note\*** In the event you are editing a reference question that has already been added and answered within employee records, you will see a prompt that states that historical answers will be updated with the new question text:

**Edit Reference Question**

\* Question

Can you comment on the reliability of the candidate?

Position

20

This question has been answered by 38 references. If you change the question text, the new text will appear with those historical answers.

CANCEL SUBMIT

## Deactivating & Reactivating Questions

To deactivate a reference question, select the icon to the right of the question and select "Deactivate":

Position ↑	Question	Hierarchy	Active	Created By	Created	Last Modified	
1	What makes the candidate a good fit for this job?	High Tech Staffing - 2		joshua.kramer	9/4/2024	9/4/2024 by joshua.kramer	
20	Can you comment on the reliability of the candidate?	System - 1		Default	Default	Default	Edit Deactivate
21	What is your favorite Colour?	System - 1		Matthew Mathieson	8/22/2024	8/27/2024 by Derek Sandkamp	

Within the prompt, select "Confirm" to deactivate the reference question:

Are you sure you want to deactivate this question?


It will no longer be displayed on the employee reference page


CANCEL CONFIRM

**\*Note\*** Reference questions cannot be **deleted**, they can only be **deactivated**.

Deactivated reference questions are able to be found by selecting "Inactive" or "Any" within the "Status" dropdown:

Question Status: Inactive

To reactivate a deactivated reference question, select the  icon to the right of the question and select "Reactivate":

Position ↑	Question	Hierarchy	Active	Created By	Created	Last Modified	
1	What is your favorite color?	System - 1		Derek Sandkamp	8/27/2024	9/4/2024 by Max Corcoran1	<input type="button" value="Edit"/> <input checked="" type="button" value="Reactivate"/>

Rows per page: 20 1 of 1

Within the prompt, select "Confirm" to reactivate the reference question:

Are you sure you want to reactivate this question?

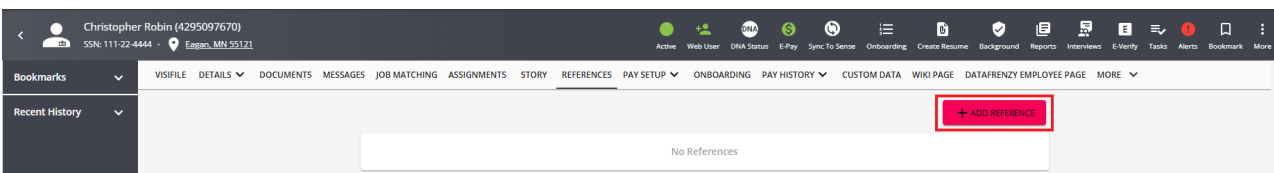
It will be displayed on the employee reference page

## Managing References

References are managed via the employee records, within the "References" tab.

### Adding References

References can be added to the employee by navigating to Beyond > Employee > "References" tab > "+ Add Reference":



**\*Note\*** If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "References" page along with all other applicable Read/Write access within Employee > References to the Security Groups that require the functionality:

BY PAGE BY FIELD Selecting a parent selects children

🔍 references ✕

Employee	<input checked="" type="checkbox"/> Access
References Page	<input checked="" type="checkbox"/> Access
Add or Edit Employee Reference Form	<input checked="" type="checkbox"/> Access
Last Name Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Reference Type Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Include In Background Checks? Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Permission to Contact? Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Company Name Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Reference Completed Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

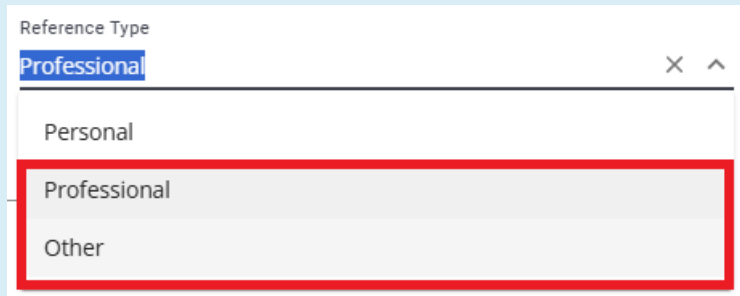
Within the "Add Reference" window, enter the appropriate information:

### Add Reference

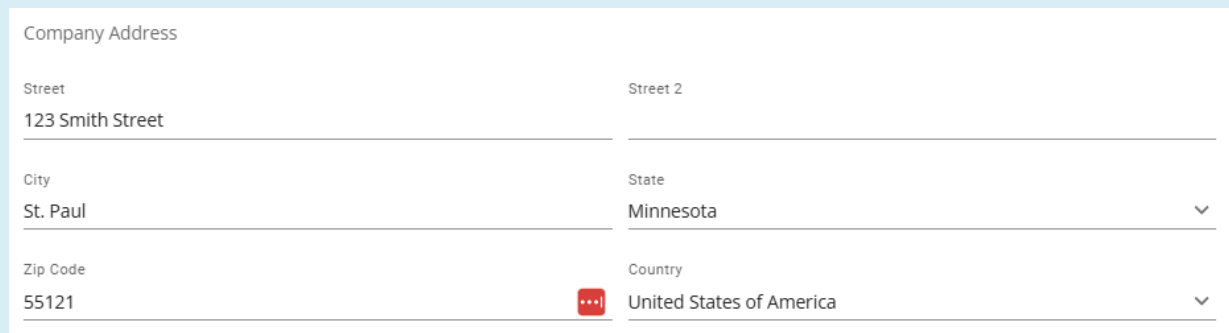
First Name John	Last Name Smith
Relationship to Christopher Robin Former Employer	Reference Type Professional <span style="float: right;">▼</span>
Company Name Smithings	
<input checked="" type="checkbox"/> Permission to Contact?	
* Phone Format U.S./CA +1 <span style="float: right;">▼</span>	Phone Number (555) 555-5555
Email Address john.smith@smithings.com	
Reference Sent 9/4/2024 <span style="float: right;">✕</span>	Reference Completed
Notes John Smith spoke very highly of Christopher Robin.	
<input checked="" type="checkbox"/> Include In Background Checks?	
Company Address	

SAVE AS DRAFT
CANCEL
SUBMIT

**\*Note\*** Selecting "Professional" or "Other" within the "Reference Type" dropdown will show the "Company Address" information at the bottom of the reference window:



A screenshot of a "Reference Type" dropdown menu. The menu is open, showing three options: "Personal", "Professional", and "Other". The "Professional" option is highlighted with a red rectangular border. The dropdown has a title bar with "Reference Type" and a close button (X) and an up arrow (^).



A screenshot of a "Company Address" form. The form is divided into two columns. The left column contains fields for "Street" (123 Smith Street), "City" (St. Paul), and "Zip Code" (55121). The right column contains fields for "Street 2" (empty), "State" (Minnesota), and "Country" (United States of America). The "State" and "Country" fields are dropdown menus with downward arrows.

Once complete, select "Submit":

### Add Reference

First Name:  Last Name:

Relationship to Christopher Robin:  Reference Type:  ▼

Company Name:

Permission to Contact?

\* Phone Format:  Phone Number:  Email Address:

Reference Sent:  ✕ Reference Completed:

Notes: 

John Smith spoke very highly of Christopher Robin.

Include In Background Checks?

Company Address:

SAVE AS DRAFT
CANCEL
SUBMIT

Once added, the reference questions are able to be answered by selecting the icon to the right of the reference and then selecting the pencil icon to the right of the individual questions:

**John Smith** (Former Employer)  
 Smithings · Sent September 4th 2024 · No Completed Date

(555) 555-5555 · john.smith@smithings.com  
123 Smith Street, St. Paul, MN 55121 United States of America  
 John Smith spoke very highly of Christopher Robin.

---


**Q** What makes the candidate a good fit for this job?

**A** --

Once the answer has been entered, select "Save":



**John Smith** (Former Employer)  
Smithings · Sent September 4th 2024 📅 · No Completed Date 📅

 (555) 555-5555 · john.smith@smithings.com  
123 Smith Street, St. Paul, MN 55121 United States of America  
John Smith spoke very highly of Christopher Robin.


---

**Q** What makes the candidate a good fit for this job?


**A** Reliable, hardworking, respectful, confident.



CANCEL **SAVE**



## Editing References

To edit a reference, select the  icon to the right of the reference and select "Edit":

**John Smith** (Former Employer)  
Smithings · Sent September 4th 2024 📅 · No Completed Date 📅

 (555) 555-5555 · john.smith@smithings.com  
123 Smith Street, St. Paul, MN 55121 United States of America  
John Smith spoke very highly of Christopher Robin.

-  Edit
-  Delete

Within the "Edit Reference" window, update any of the information and select "Submit" once complete:

### Edit Reference

First Name: John

Last Name: Smith

Relationship to Christopher Robin: Former Employer

Reference Type: Professional

Company Name: Smithings

Permission to Contact?

\* Phone Format: U.S./CA +1

Phone Number: (555) 555-5555

Email Address: john.smith@smithings.com

Reference Sent: 9/4/2024

Reference Completed: 9/5/2024


Notes: John Smith spoke very highly of Christopher Robin.

Include In Background Checks?


Company Address: \_\_\_\_\_



SAVE AS DRAFT CANCEL **SUBMIT**



### Deleting References

To delete a reference, select the  icon to the right of the reference and select "Delete":

**John Smith** (Former Employer)  
 Smithings · Sent September 4th 2024 · No Completed Date

 (555) 555-5555 · john.smith@smithings.com  
 123 Smith Street, St. Paul, MN 55121 United States of America  
 John Smith spoke very highly of Christopher Robin.

-  Edit
-  **Delete**

Within the prompt, select "Yes" to confirm the deletion of the reference:

**Confirm Delete**

Are you sure you would like to delete **John Smith**?

NO **YES**

## Related Articles