

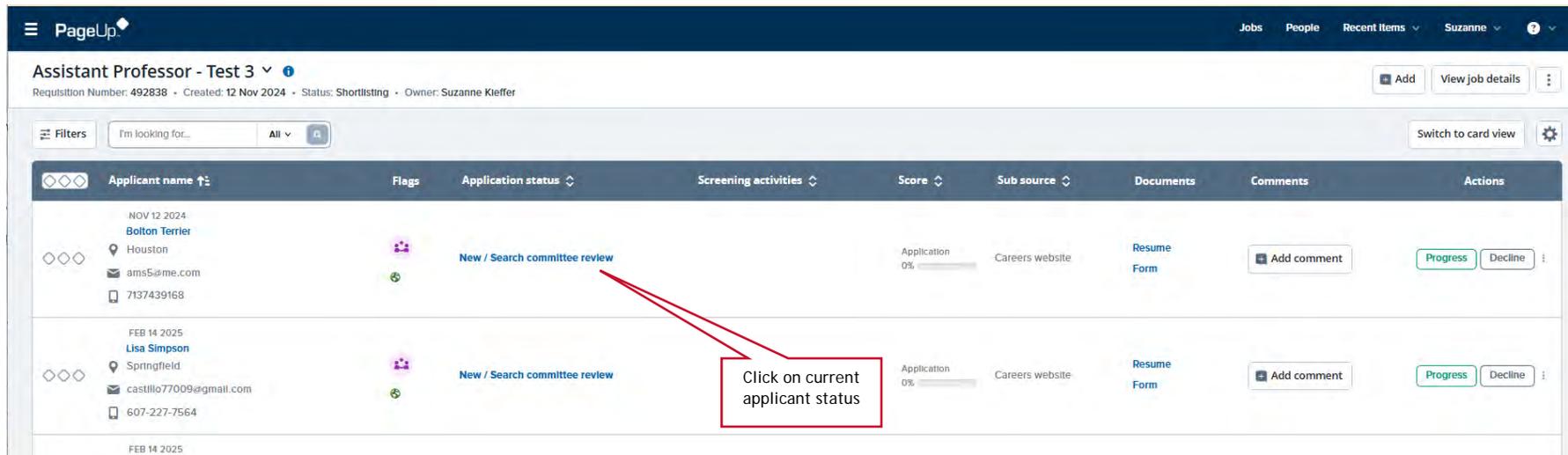
## Requesting Reference Letters

PageUp can automatically request and collect reference letters for faculty. Letters can be requested for one candidate or a group of candidates.

If the recruitment process for the posting is set to automatically request letters, this process is not needed.

### Individual requests

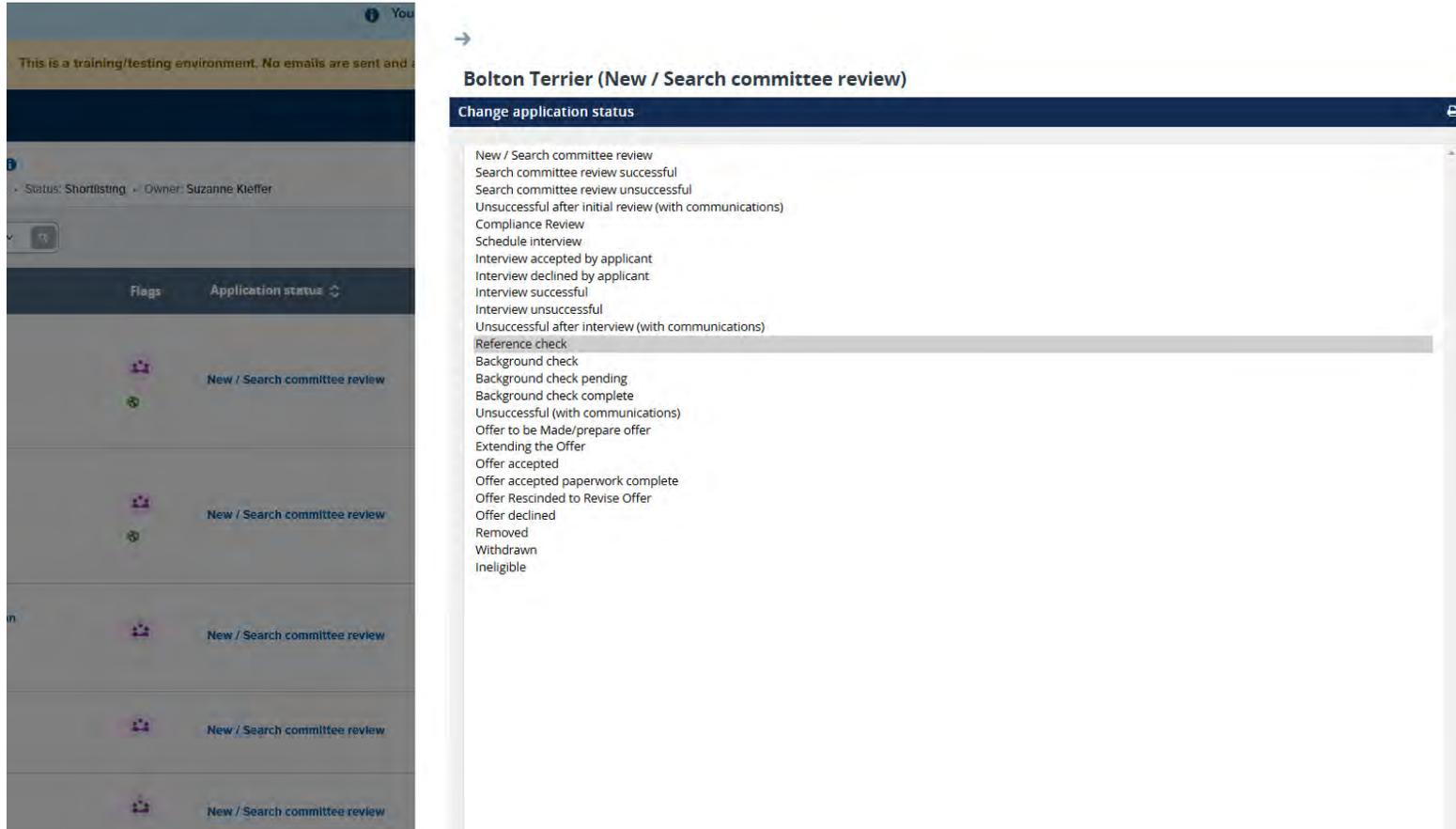
Open the Applicant List for the posting. From the applicant list, click on the application status.



If you have questions or need assistance navigating the system, please contact the Office of Faculty Affairs at [FacultyAffairs@uh.edu](mailto:FacultyAffairs@uh.edu) or 713-743-9168.

# PageUp

On the side screen pop up, select the status "Reference Check" to initiate the request.

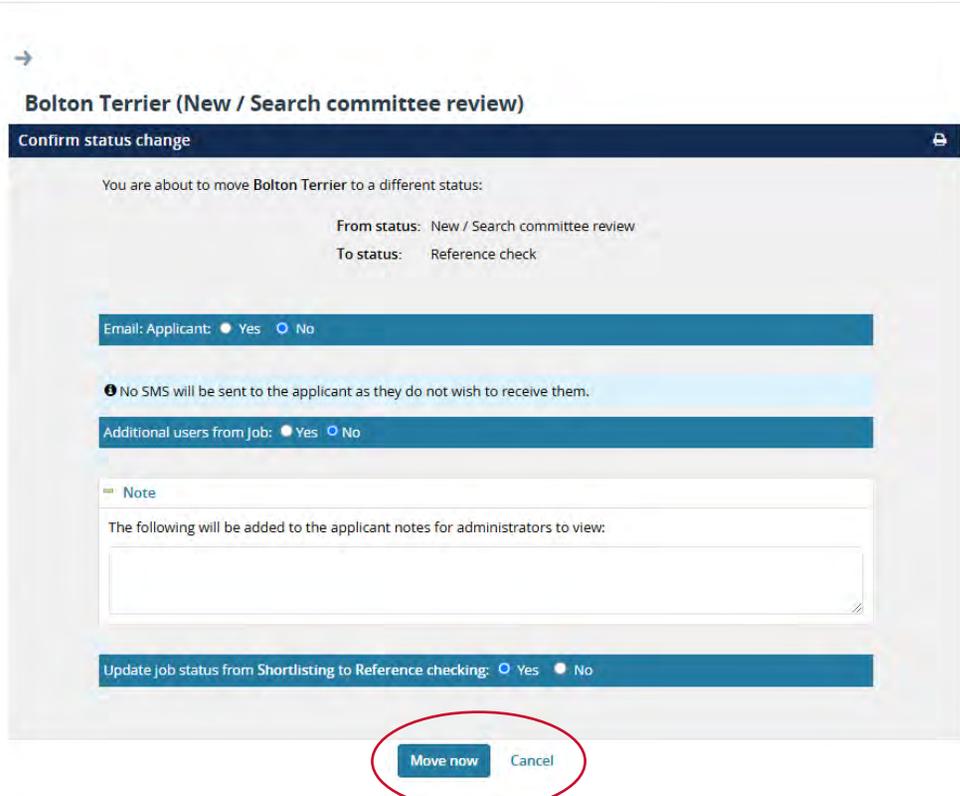
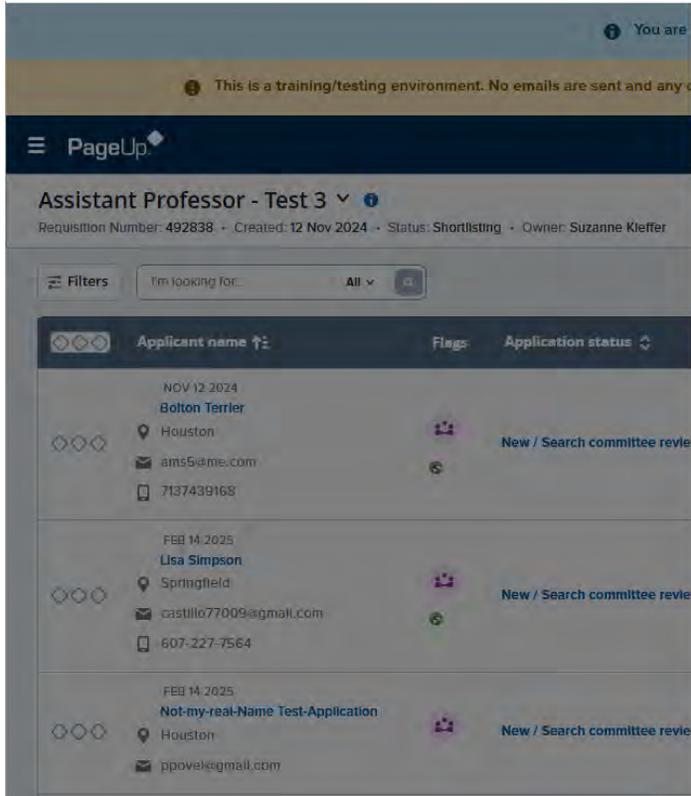


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# PageUp

On the next screen are the Communication options. You can select to notify the candidate that the reference letters are being requested. A notification can also be sent to the requisition users. The email notifications are set to "no." Change to "yes" if notifications should be sent.

Click Move Now button to update the status.



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# PageUp

The next screen will show the list of letter writers & the reference status. Click Done to return to the list of applicants.

The screenshot displays a web interface for managing references. At the top, it says "Bolton Terrier (New / Search committee review)". Below this is a "Manage references" header with a trash icon. Underneath, there are links for "New" and "Send invitations". The main content area shows "Job: Assistant Professor - Test 3 (492838)". A "Status:" dropdown menu is set to "All", with "Clear" and "Search" buttons. A table lists reference data with columns: First name, Last name, Type of reference, Status, Expiry, Score, Organization, Reference position, Phone Number, Email, and Length of Ter. The table contains one row: reference, one, Professional / Colleague, Invited, Feb 28, 2025, uh, 123, , , ashort@uh.edu. Below the table, it says "Page 1 of 1 Jump to page" and "Records 1 to 1 of 1". At the bottom center, a blue "Done" button is circled in red.

First name	Last name	Type of reference	Status	Expiry	Score	Organization	Reference position	Phone Number	Email	Length of Ter
reference	one	Professional / Colleague	Invited	Feb 28, 2025		uh	123		ashort@uh.edu	

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# PageUp

## Bulk Moving Applicants

To move multiple candidates, click on the green diamond to select the applicants. If only selected applicants need to be noticed, you can click on the green diamond next to their name.

The screenshot displays the PageUp interface for the position "Assistant Professor - Test 3". The interface includes a search bar, filters, and a list of applicants. A red box highlights the green diamond icon next to the first applicant, with a callout that says "Click Green diamond to select all".

Applicant name	Flags	Application status	Screening activities	Score	Sub source	Documents	Comments	Actions
FEB 14 2025 Lisa Simpson Springfield castilio77009@gmail.com 607-227-7564		New / Search committee review		Application 0%	Careers website	Resume Form	Add comment	Progress Decline
FEB 14 2025 Not-my-real-Name Test-Application Houston ppovele@gmail.com		New / Search committee review		Application 0%	Careers website	Resume Form	Add comment	Progress Decline
NOV 21 2024 Test Test facultyaffairs10@uh.edu		New / Search committee review			Careers website	Resume	Add comment	Progress Decline
FEB 14 2025 Truffle Fammy facultyaffairs01@uh.edu		New / Search committee review			Careers website		Add comment	Progress Decline

1 - 4 results out of 4

4 selected 0 selected 0 selected Bulk Actions Press ESC to deselect all

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# PageUp

At the bottom of the screen, click on Green Diamond to Change status on the selected applicants.

The screenshot displays the PageUp application management interface. At the top, there is a navigation bar with the PageUp logo and user information (Jobs, People, Recent Items, Suzanne). Below this, the page title is "Assistant Professor - Test 3" with a dropdown arrow and an information icon. A sub-header shows "Requisition Number: 492838", "Created: 12 Nov 2024", "Status: Reference checking", and "Owner: Suzanne Kieffer".

The main content area features a search bar with the text "I'm looking for..." and a search icon. Below the search bar, there are filter tabs: "Showing: Application status: New / Search committee review" and a "Clear all" button. A "Switch to card view" button is also present.

The central part of the interface is a table with columns: Applicant name, Flags, Application status, Screening activities, Score, Sub source, Documents, Comments, and Actions. Four applicants are listed:

- Lisa Simpson**: FEB 14 2025, Springfield, castillo77009@gmail.com, 607-227-7564. Application status: New / Search committee review. Application progress: 0%. Documents: Resume Form. Actions: Add comment, Progress, Decline.
- Not-my-real-Name Test-Application**: FEB 14 2025, Houston, ppovel@gmail.com. Application status: New / Search committee review. Application progress: 0%. Documents: Resume Form. Actions: Add comment, Progress, Decline.
- Test Test**: NOV 21 2024, facultyaffairs10@uh.edu. Application status: Search committee review. Application progress: 0%. Documents: Resume. Actions: Add comment, Progress, Decline.
- Truffle Fammy**: FEB 14 2025, facultyaffairs01@uh.edu. Application status: Search committee review. Application progress: 0%. Documents: Resume. Actions: Add comment, Progress, Decline.

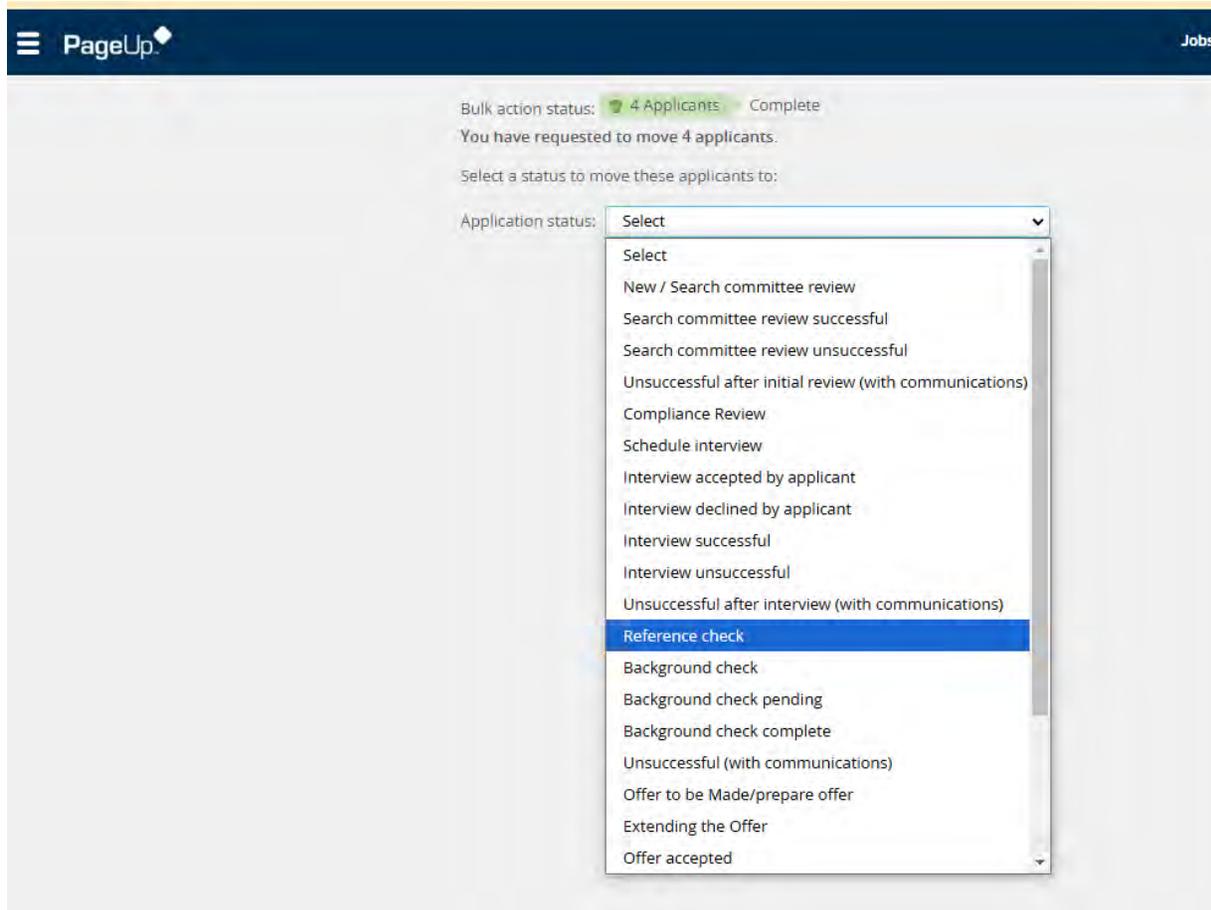
A context menu is open over the "Test Test" row, with the "Change status" option circled in red. The menu items are: Change status, Bulk communicate, Bulk complete and send, Bulk apply, Bulk categorise, Bulk assign, Bulk document merge, Bulk export, and Bulk invite to apply.

At the bottom of the table, there is a "Bulk Actions" section with "4 selected" and "0 selected" indicators. A red box with the text "Click Green diamond to Change status" has an arrow pointing to the green diamond icon in the "Bulk Actions" section.

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# PageUp

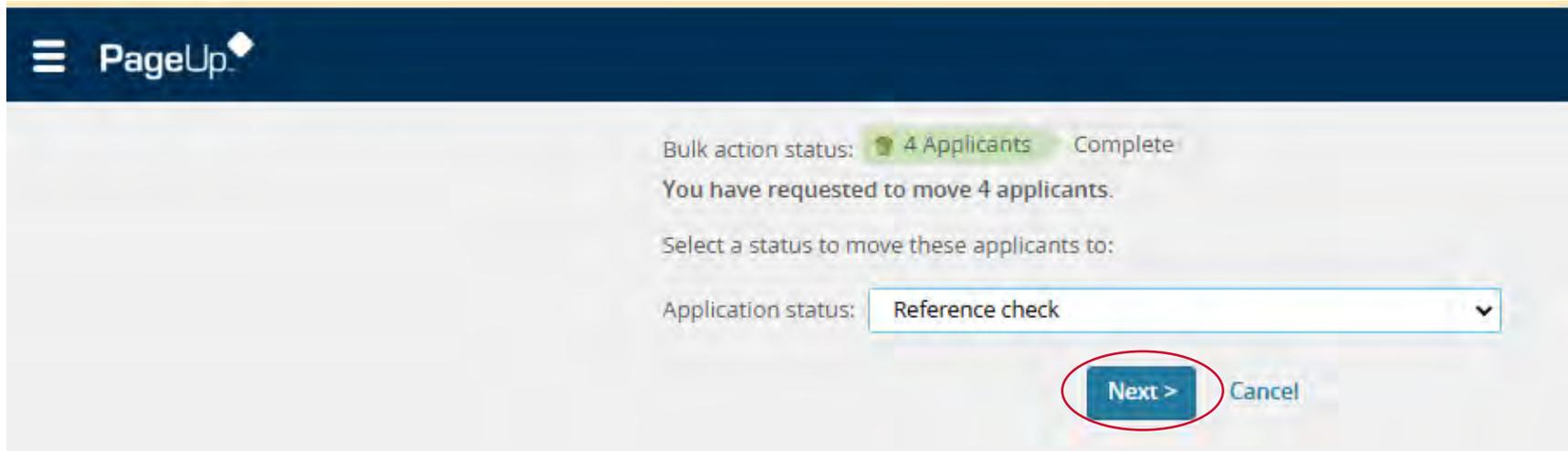
On the Change Status pop up screen, select Reference Check



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## PageUp

Click Next button to transition the selected applications to Reference Check & send the automated notices.



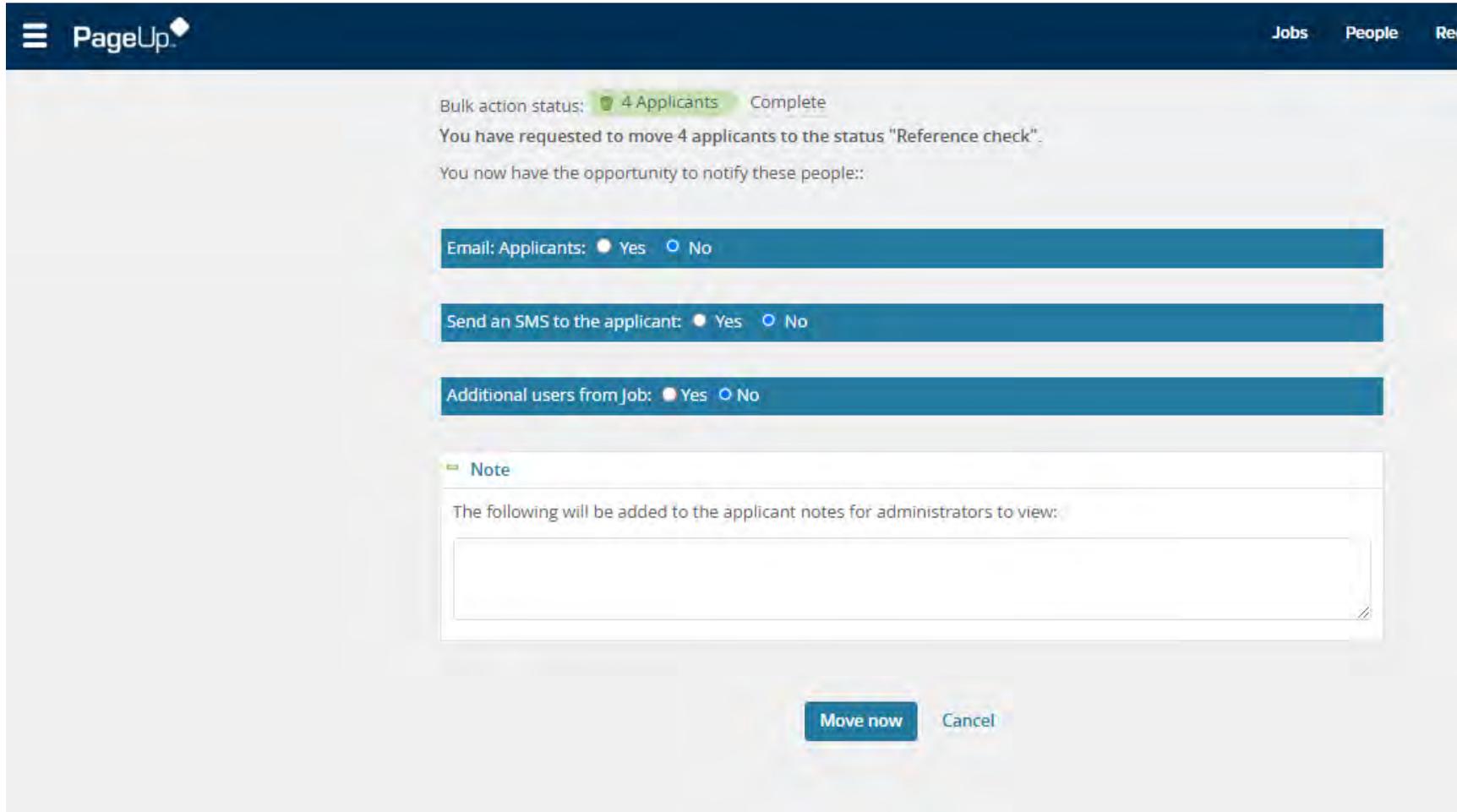
The screenshot shows the PageUp application interface. At the top left is the PageUp logo. The main content area displays the following information:

- Bulk action status: 4 Applicants Complete
- You have requested to move 4 applicants.
- Select a status to move these applicants to:
- Application status: Reference check (selected in a dropdown menu)
- Next > (button, circled in red)
- Cancel (button)

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## PageUp

On the next screen are the Communication options. You can select to notify the candidate that the reference letters are being requested. A notification can also be sent to the requisition users. The email notifications are set to "no." Change to "yes" if notifications should be sent.



The screenshot displays the PageUp system interface. At the top left is the PageUp logo, and at the top right are navigation links for "Jobs", "People", and "Re". The main content area shows a "Bulk action status" for "4 Applicants" which is "Complete". Below this, a message states: "You have requested to move 4 applicants to the status 'Reference check'." and "You now have the opportunity to notify these people:". There are three blue bars with white text and radio buttons for "Yes" and "No":  
1. "Email: Applicants:" with "Yes" selected.  
2. "Send an SMS to the applicant:" with "No" selected.  
3. "Additional users from Job:" with "No" selected.  
Below these is a "Note" section with a header "Note" and a sub-header "The following will be added to the applicant notes for administrators to view:". A large, empty text input field is provided for notes. At the bottom right of the form are two buttons: "Move now" and "Cancel".

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# PageUp

Once the reference has been requested, the Application Status will be updated to Reference Check. Submitted Reference letters can be viewed by clicking on Form and scrolling to the reference letter section on the application.

The screenshot displays the PageUp application management interface. At the top, the header shows 'PageUp' and navigation links for 'Jobs', 'People', 'Recent Items', and 'Suzanne'. Below the header, the page title is 'Assistant Professor - Test 3' with a dropdown arrow and an information icon. Subtext includes 'Requisition Number: 492838', 'Created: 12 Nov 2024', 'Status: Reference checking', and 'Owner: Suzanne Kieffer'. There are 'Add' and 'View job details' buttons.

A search bar with 'Filters' and 'I'm looking for...' is present. Below it, a table lists applicants. The table has columns for Applicant name, Flags, Application status, Screening activities, Score, Sub source, Documents, Comments, and Actions. The first applicant, Bolton Terrier (NOV 12 2024), has 'Reference check' circled in red in the Application status column and 'Form' circled in red in the Documents column. Other applicants listed include Lisa Simpson, Not-my-real-Name Test-Application, Test Test, and Truffle Fanny.

Applicant name	Flags	Application status	Screening activities	Score	Sub source	Documents	Comments	Actions
NOV 12 2024 Bolton Terrier Houston ams5@me.com 7137439168	👤	Reference check		Application 0%	Careers website	Resume Form	Add comment	Progress Decline
FEB 14 2025 Lisa Simpson Springfield castillo77009@gmail.com 607-227-7564	👤	Reference check		Application 0%	Careers website	Resume Form	Add comment	Progress Decline
FEB 14 2025 Not-my-real-Name Test-Application Houston ppovej@gmail.com	👤	Reference check		Application 0%	Careers website	Resume Form	Add comment	Progress Decline
NOV 21 2024 Test Test facultyaffairs10@uh.edu	👤	Reference check			Careers website	Resume	Add comment	Progress Decline
FEB 14 2025 Truffle Fanny facultyaffairs01@uh.edu	👤	Reference check			Careers website		Add comment	Progress Decline

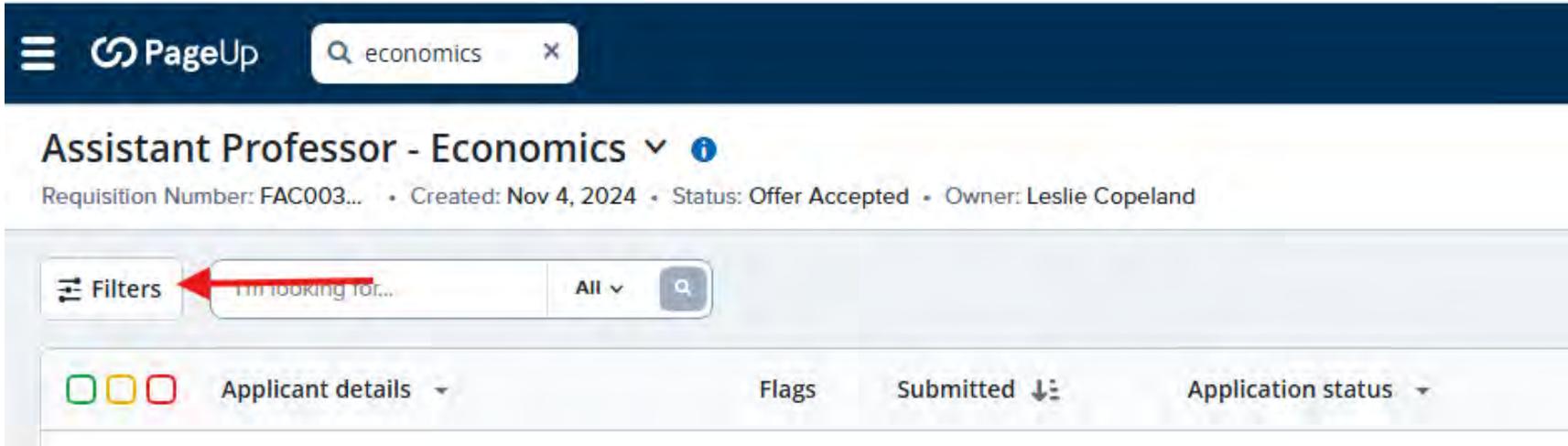
1 - 5 results out of 5

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# PageUp

## Review Reference Status

Open the Applicant List, click on the Filters button to expand filtering options to check on the reference status.



The screenshot shows the PageUp interface for a requisition titled "Assistant Professor - Economics". The page includes a search bar with "economics" entered, a requisition number "FAC003...", a creation date of "Nov 4, 2024", a status of "Offer Accepted", and an owner of "Leslie Copeland". A "Filters" button is highlighted with a red arrow, indicating the next step in the process. Below the filters, there are columns for "Applicant details", "Flags", "Submitted", and "Application status".

Scroll down to select Reference Check Status on the Filter menu.

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# PageUp

Assistant Professor - Economics ▼ 📘  
 Requisition Number: FAC003... • Created: Nov 4, 2024 • Status

Hide Filters | I'm looking for... | All ▼

**Filters** ✕

Quick filters ▼ ○○○

Application status ▼ ○○○

Assessment status ▼ ○○○

Flags ▼ ○○○

Pre-offer check status ▼ ○○○

Profile source ▼ ○○○

**Reference check status**

All completed

At least one completed

In progress / Invited

Incomplete checks

Expired checks

Checks not performed

Categories ▼ ○○○

Application score ▼ ○○○

Interaction score ▼ ○○○

Assessment score ▼ ○○○

**Apply** ←

## Reference Check Statuses

### At least one reference check complete

Applicant is returned from the search if the applicant's 1st or 2nd Referee has a reference check record with a completed status, an expiry date greater than or equal to the current date and a score.

### Reference checks invited or in progress

An applicant is returned from the search if the applicant's 1st or 2nd referee has a reference check record with an in progress or invited status.

### Incomplete reference checks

An applicant is returned from the search if the applicant's 1st or 2nd referee has a reference check record with an incomplete status.

### Reference checks expired

An applicant is returned from the search if the applicant's 1st or 2nd referee has a reference check record with a completed status and an expiry date less than the current date.

### Reference checks not performed

An applicant is returned from the search if the applicant doesn't have a 1st or 2nd referee or if the applicant's 1st or 2nd referee doesn't meet all the other reference check filter types above

Select the status to filter by reference check. If checks are expired & click Apply to filter

Click Apply. The applicant list will filter based on selected status

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# PageUp

## Reference Check Notes

1. Reference Request allow for 14 days to respond.
2. Resending a reference request before the invitation is expired will inactivate the first request and a new link will be sent. Do not resend unless expired or the reference writer requests a new link.
3. Reference Letters appear on the Application Form and also on the Offer grid under Applicant Documents. They are not viewable to the candidates.

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