

The Referral Process

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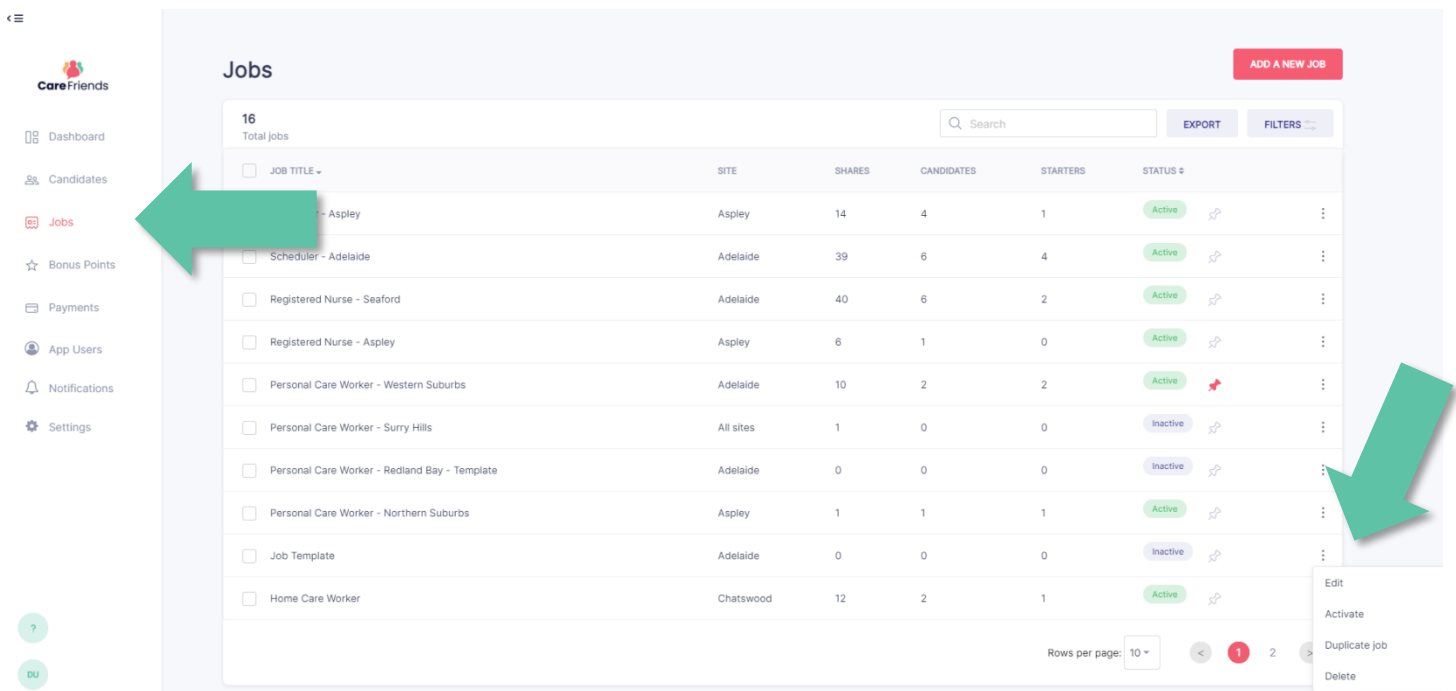
Creating Jobs

We have created a job template in your Care Friends Portal. The quickest way to create a **new** job is by **duplicating** the job template and changing a few parameters, such as job title, position description etc.

Click on **Jobs** in the menu on the left.

Click on the **3 dots** on the right-hand side of that job template




Choose **Duplicate**



JOB TITLE	SITE	SHARES	CANDIDATES	STARTERS	STATUS
Scheduler - Aspley	Aspley	14	4	1	Active
Scheduler - Adelaide	Adelaide	39	6	4	Active
Registered Nurse - Seaford	Adelaide	40	6	2	Active
Registered Nurse - Aspley	Aspley	6	1	0	Active
Personal Care Worker - Western Suburbs	Adelaide	10	2	2	Active
Personal Care Worker - Surry Hills	All sites	1	0	0	Inactive
Personal Care Worker - Redland Bay - Template	Adelaide	0	0	0	Inactive
Personal Care Worker - Northern Suburbs	Aspley	1	1	1	Active
Job Template	Adelaide	0	0	0	Inactive
Home Care Worker	Chatswood	12	2	1	Active

Please note the pink pin next to a job.

This feature pins that job to the app homescreen to highlight the job.

Active	
Active	
Inactive	

Now that you've duplicated the template, it's time to edit it!

Click on the **3 dots** on the right-hand side of that duplicated job template

Choose **Edit** and change all required fields to match your actual job

Although you've now created a new job, it is not yet active....

Activate a new job to send it out to all App Users

Once you have duplicated a job you need to

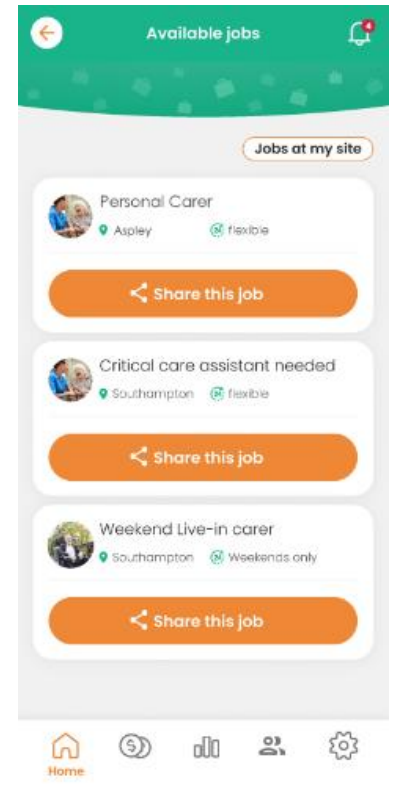
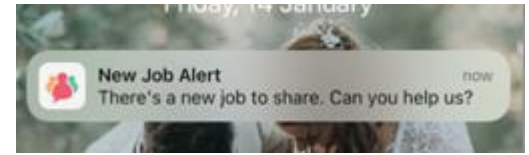
Activate the job for a notification to be sent to all app users.

Click on the 3 dots for the new job that you have created

Select **Activate**

This sends a notification to all app users that a new job is available to share.

⇒ Remember to **deactivate** when the job is no longer available.



Receiving EOIs

When someone expresses interest in a job, an email will be sent to the nominated person attached to that job (this is set up when creating a new job).

Best practice is to contact the referral as soon as possible (within the hour) by phone. Referrals are generally considered of “higher quality” than many other recruitment sources and a VIP treatment is recommended.

Call the referral to check eligibility

When calling the referral, we recommend you first check if they are an **eligible** referral before checking if they are **suitable** for the job. Your scheme rules dictate that the referral must be:

- Not an internal candidate
- Not previously referred in the last 6 months
- Qualified if necessary and lives within a reasonable distance to the job

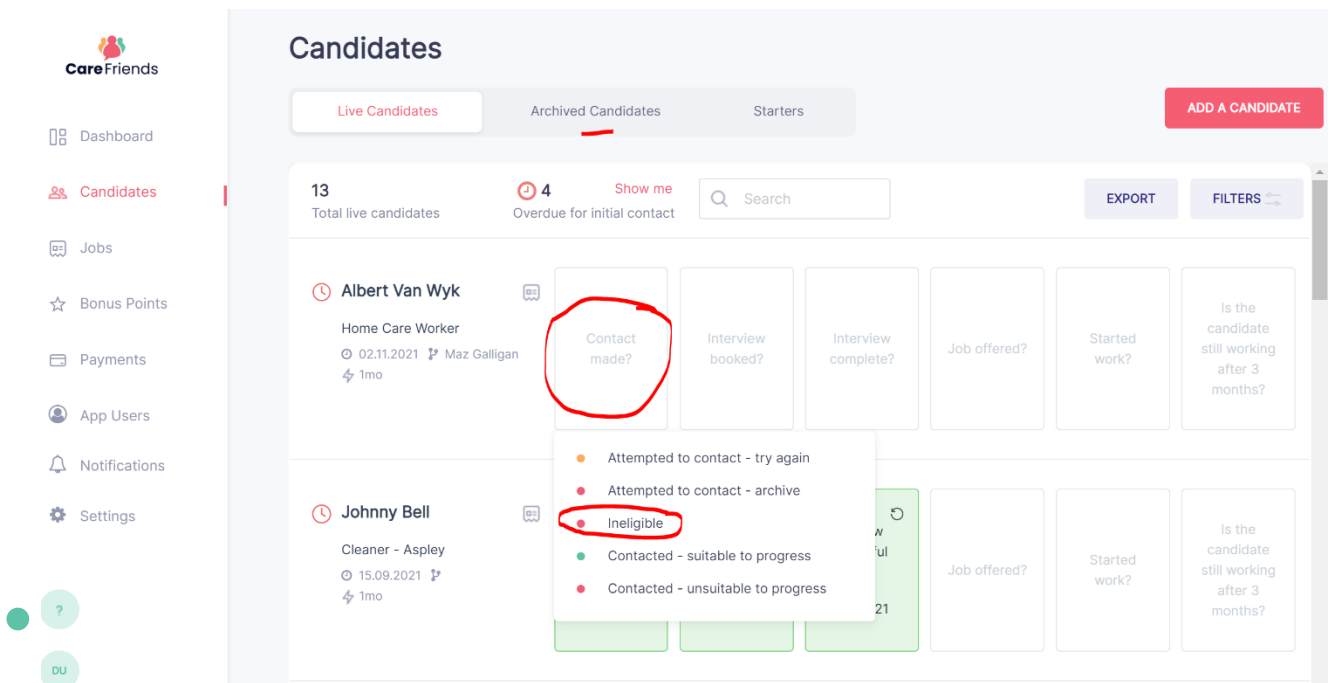
At the end of this call determine if this referral is **eligible** to proceed or is deemed **ineligible**.

Ineligible

Click on **Candidates** in the left-hand menu

Click on the **Contact Made** stage and choose **Ineligible** (please note the other options)

This will move the referral into the **Archived Candidates** tab and out of your way. The referring employee will automatically get a notification to advise their referral was unsuitable. Done!



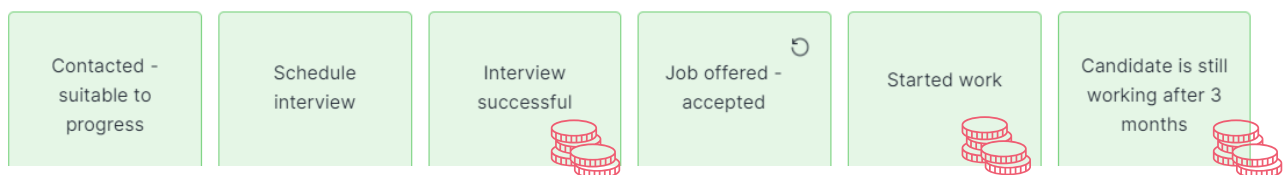
The screenshot shows the CareFriends web application interface. On the left is a sidebar menu with options: Dashboard, Candidates (highlighted), Jobs, Bonus Points, Payments, App Users, Notifications, and Settings. The main area is titled 'Candidates' and has three tabs: 'Live Candidates', 'Archived Candidates' (which is underlined with a red line), and 'Starters'. A red button 'ADD A CANDIDATE' is in the top right. Below the tabs, there are statistics: '13 Total live candidates' and '4 Overdue for initial contact' with a 'Show me' link. A search bar and 'EXPORT'/'FILTERS' buttons are also present. The candidate list shows two entries: 'Albert Van Wyk' (Home Care Worker, 02.11.2021, Maz Galligan, 1mo) and 'Johnny Bell' (Cleaner - Aspley, 15.09.2021, 1mo). For each candidate, there are status boxes: 'Contact made?', 'Interview booked?', 'Interview complete?', 'Job offered?', 'Started work?', and 'Is the candidate still working after 3 months?'. A red circle highlights the 'Contact made?' box for Albert Van Wyk. A dropdown menu is open for this box, showing options: 'Attempted to contact - try again', 'Attempted to contact - archive', 'Ineligible' (highlighted with a red circle), 'Contacted - suitable to progress', and 'Contacted - unsuitable to progress'.

😊 Eligible

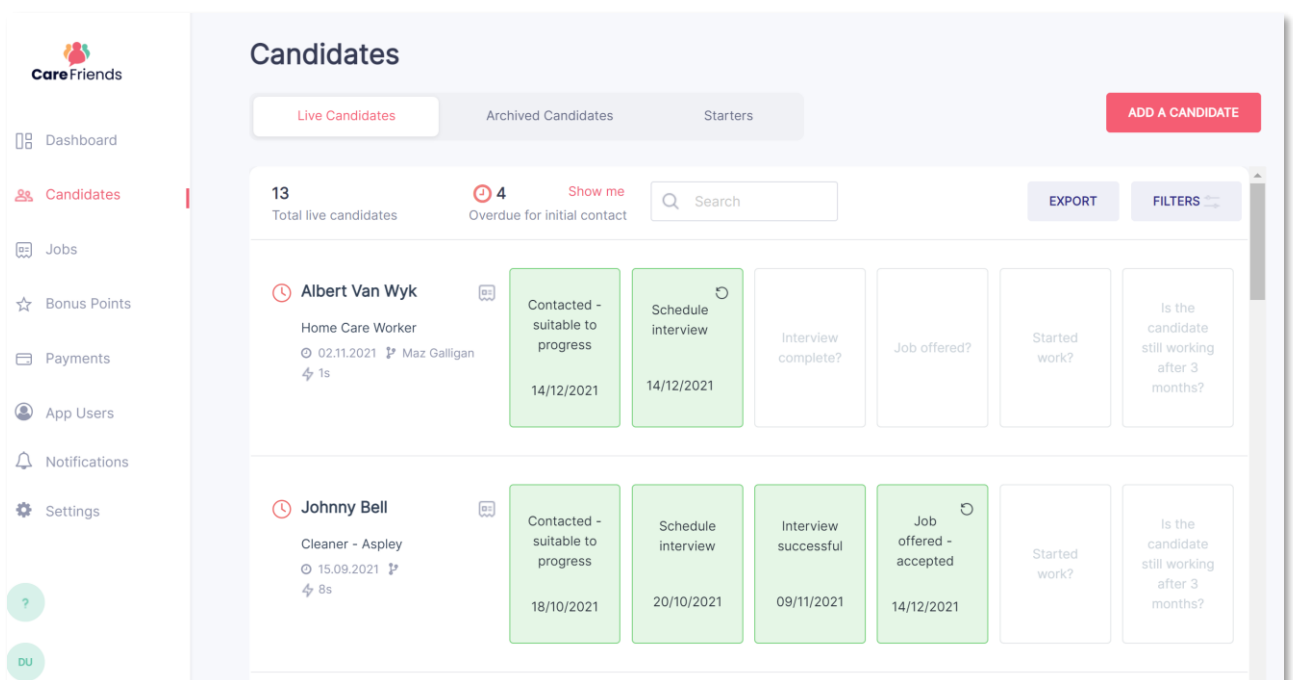
Excellent! Proceed with your recruitment screening process as normal.

Move the candidate through the referral screens

You can now move your referral through the candidate screen in the Care Friends portal. Best practice is to update these steps closely in line with the actual steps in the recruitment process. Be aware that many of these boxes automatically send notifications to the referee and three of them will incur referral points:



Continue following your normal recruitment process liaising closely with HR and the hiring manager. Be sure to keep your eye on the referral and continue ticking through the stages in the candidate screen.



Candidates

Live Candidates | Archived Candidates | Starters

13 Total live candidates | 4 Overdue for initial contact | Show me

Search | EXPORT | FILTERS

Candidate	Contacted - suitable to progress	Schedule interview	Interview complete?	Job offered?	Started work?	Is the candidate still working after 3 months?
Albert Van Wyk Home Care Worker 02.11.2021 Maz Galligan 1s	14/12/2021	14/12/2021				
Johnny Bell Cleaner - Aspley 15.09.2021 8s	18/10/2021	20/10/2021	09/11/2021	14/12/2021		

Once the candidate “started work” they will move into the **Starters** tab at the top of the screen.

The final box **Is the candidate still working after X months?** doesn’t need to be completed until that retention period is achieved. Don’t worry, you will automatically receive an email at that time to remind you! Please tick this box at that time which will then award more points and sends a notification to the referee. If they have left the job, you can select ‘no’.

Support

We have a substantial knowledge base/support tab within the portal. Here you will find all things Care Friends at an operational level, such as:

- [Manually adding a referral](#)
- [What to do with multiple expressions of interest from the same referral](#)
- [How to delete a referral](#)
- [How to move a referral out of the archive](#)
- [How to undo a candidate update](#)
- [What to do with payment requests](#)
- [How to remove points](#)

Or have a look at the complete [recruiter guide](#)

Click on the question mark in the bottom left-hand corner to reach our full knowledge base. Also feel free to reach out to us directly on support@carefriends.com.au

