

Send out E-References

This guide outlines how to send out E-References. E-References allow for a much more streamlined process for requesting and receiving references for top candidates. Candidates are required to enter at least three references on the application. NeoEd then allows hiring managers to send out references requests via email. The references can then complete these electronically – no need for coordinating phone calls to gather this information!

20 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
HR Law	Nov 18, 2025	Nov 19, 2025

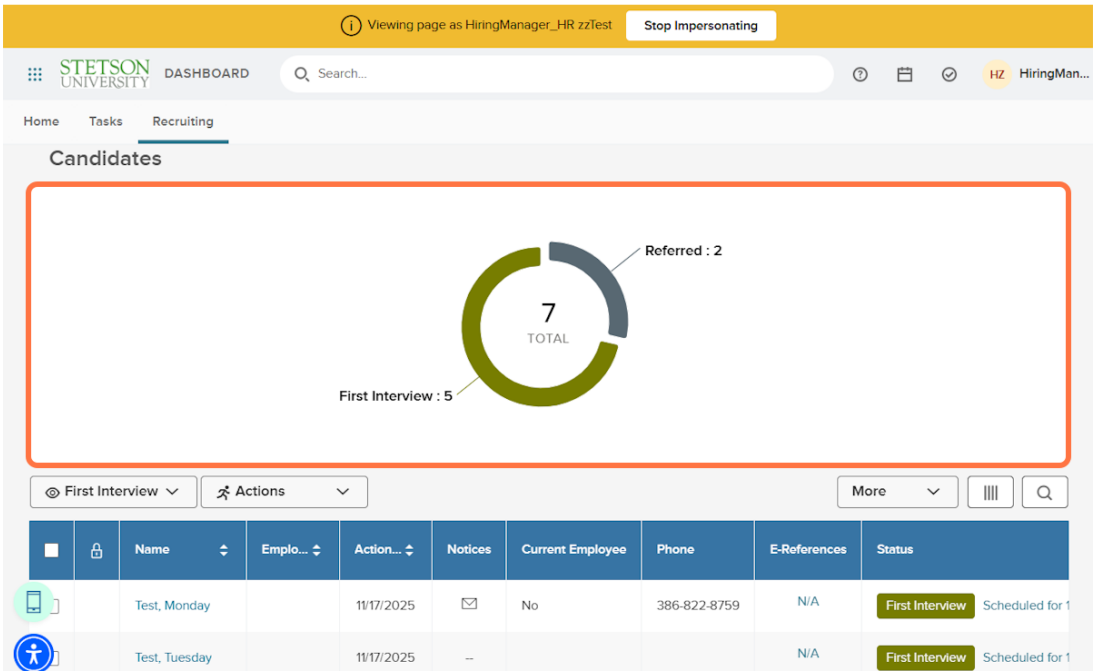
NeoEd Dashboard

20 Steps 

Access the NeoEd Dashboard at unified.neoed.com

STEP 1

Start by navigating to the Candidates page for your open position. Refer to the OHC Guide for more information on how to navigate to this page.



Viewing page as HiringManager_HR zzTest Stop Impersonating

STETSON UNIVERSITY DASHBOARD Search...

Home Tasks Recruiting

Candidates

7 TOTAL

First Interview : 5

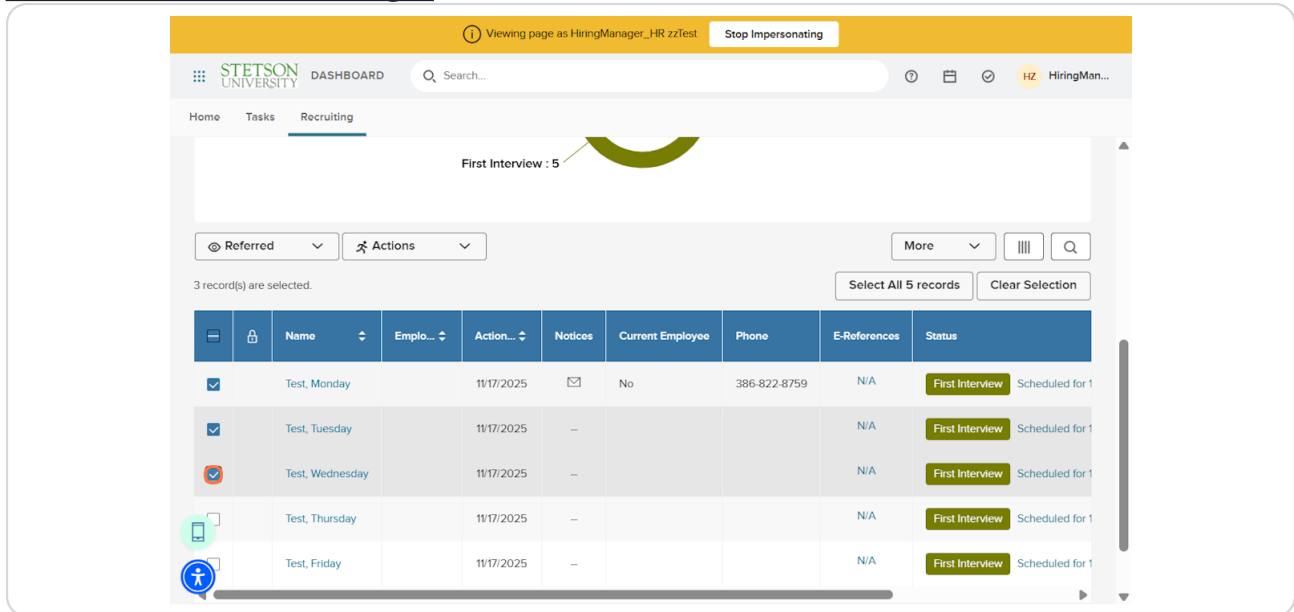
Referred : 2

First Interview Actions More

	Name	Emplo...	Action...	Notices	Current Employee	Phone	E-References	Status
	Test, Monday		11/17/2025		No	386-822-8759	N/A	First Interview Scheduled for 1
	Test, Tuesday		11/17/2025	—			N/A	First Interview Scheduled for 1

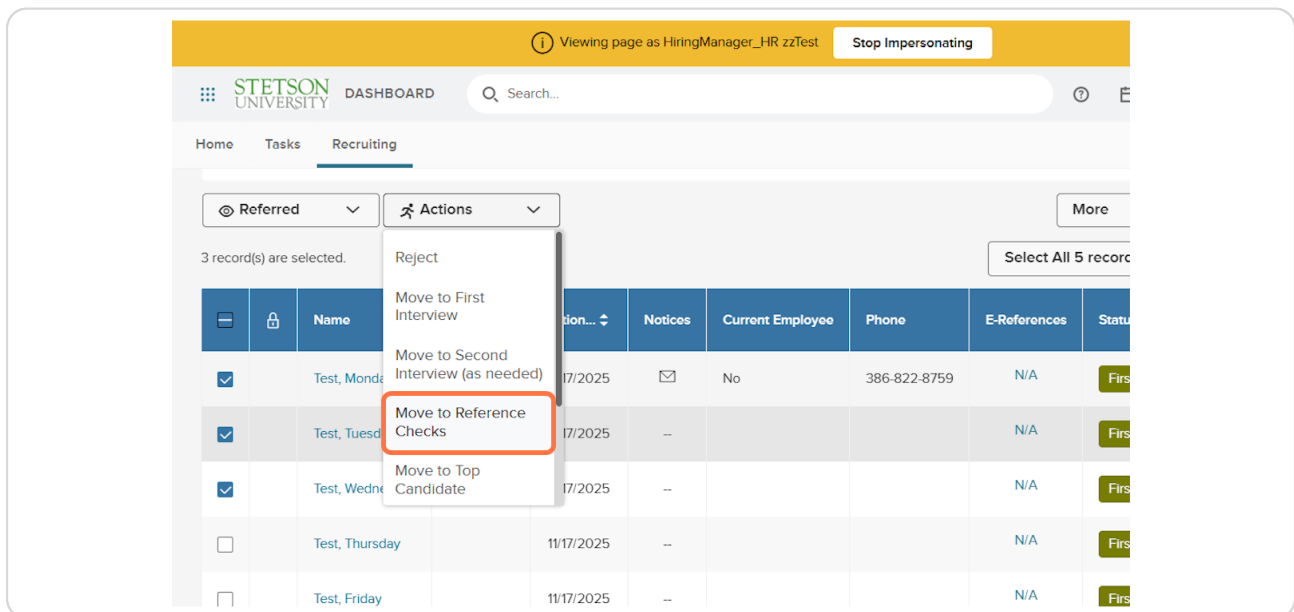
STEP 2

After interviews have been completed and ratings have been collected, you can now determine which candidates you would like to move to the Reference Checks stage. Check the box for each candidate from the list that you would like to move to this stage.



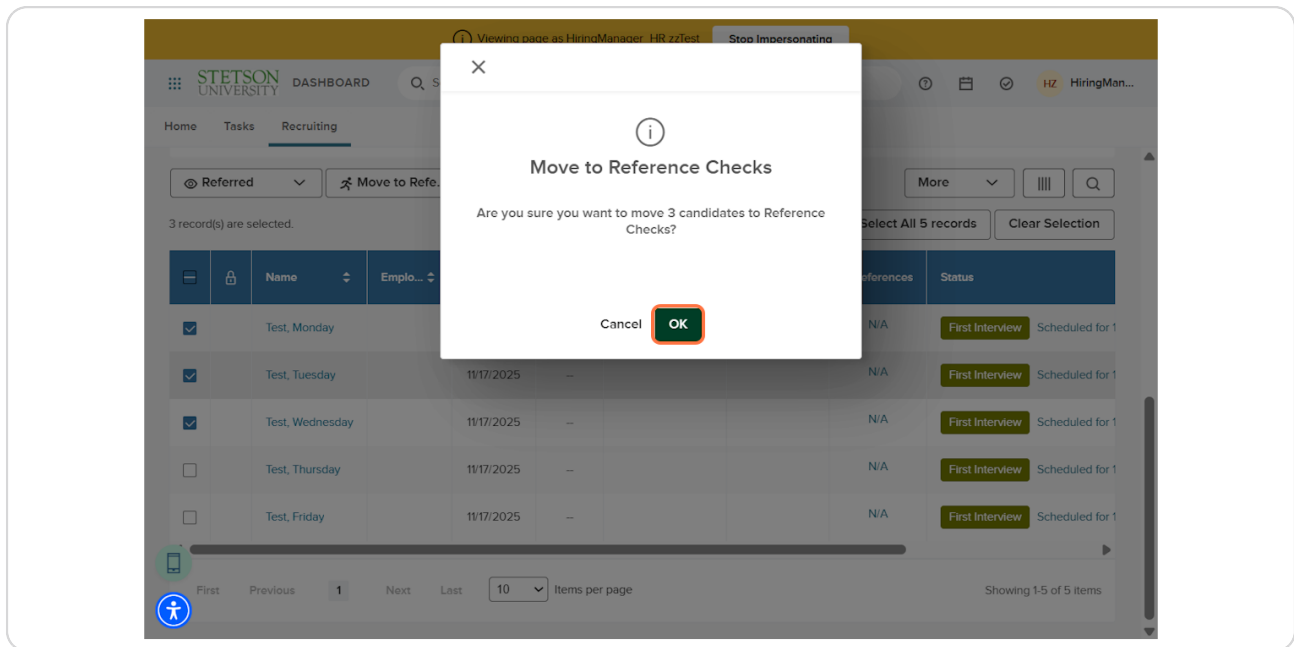
STEP 3

Click the Actions button, and then select Move to Reference Checks.



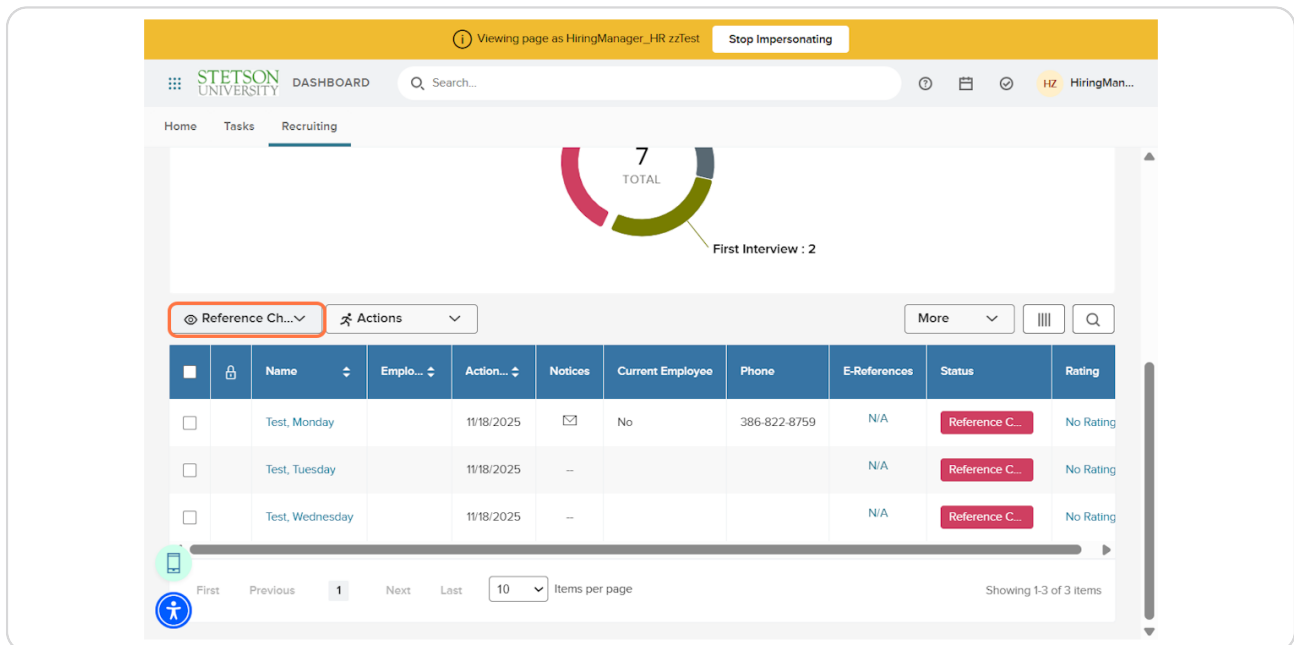
STEP 4

A pop-up will appear to confirm this Action. Click Ok.



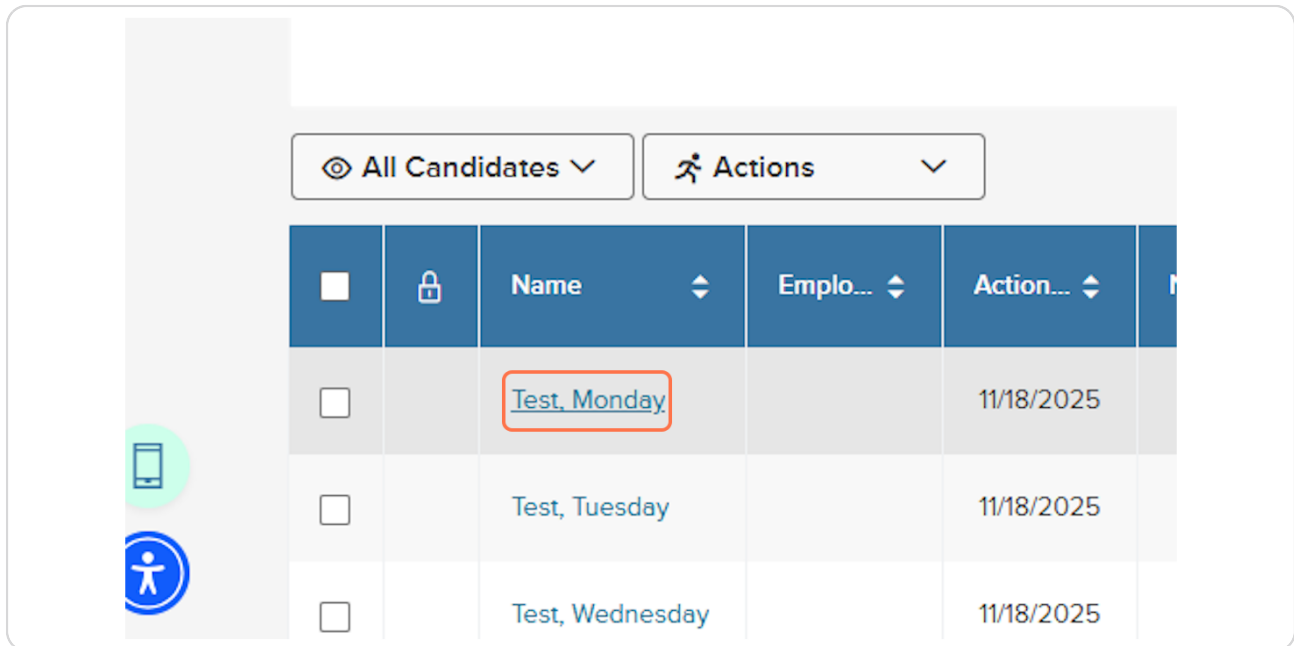
STEP 5

Navigate to the candidates moved to the Reference Checks stage by selecting that section of the pie chart or selecting it from the drop down.



STEP 6

To view the reference information submitted by each candidate, start by clicking on the candidate's name to go to their profile.

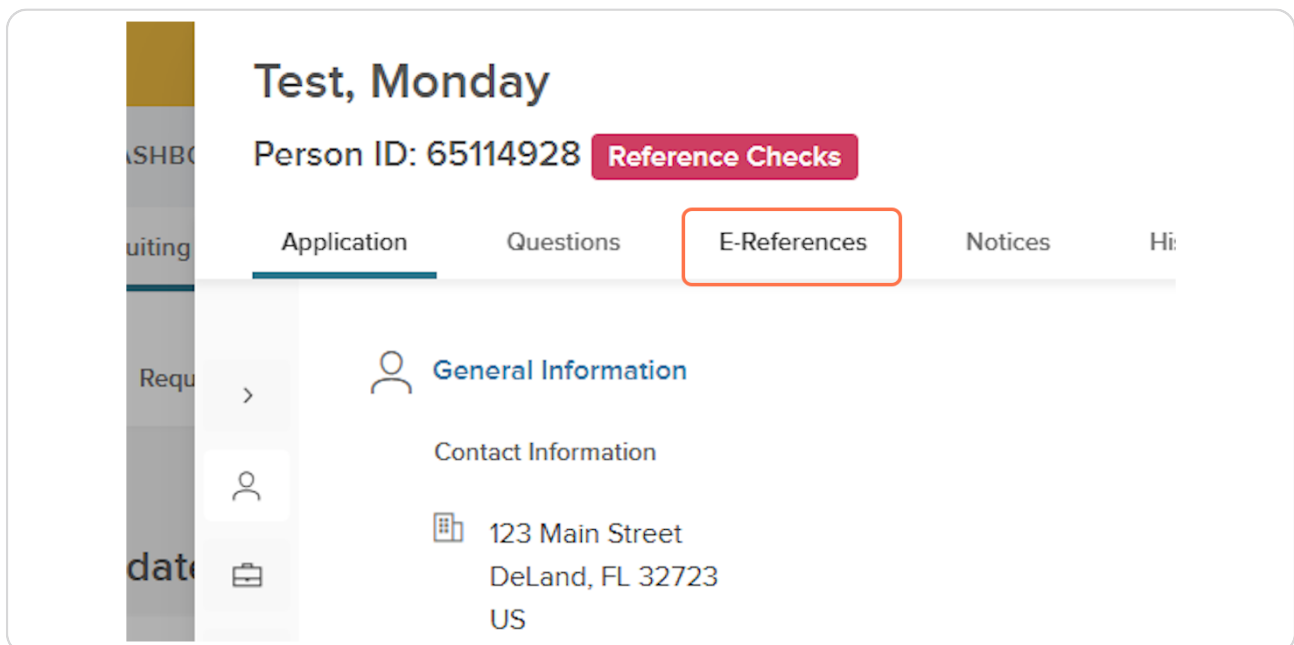


The screenshot shows a web interface with a table of candidates. At the top, there are two dropdown menus: 'All Candidates' and 'Actions'. The table has columns for a checkbox, a lock icon, 'Name', 'Emplo...', 'Action...', and a date. The first row is highlighted, and the name 'Test, Monday' is circled in red. To the left of the table, there are two circular icons: a green one with a smartphone and a blue one with a person.

☐		Name	Emplo...	Action...	
☐		Test, Monday		11/18/2025	
☐		Test, Tuesday		11/18/2025	
☐		Test, Wednesday		11/18/2025	

STEP 7

Click on the E-References tab



The screenshot shows a candidate profile for 'Test, Monday' with Person ID: 65114928. There is a 'Reference Checks' button. Below the header, there are tabs: 'Application', 'Questions', 'E-References' (highlighted with a red box), 'Notices', and 'Hi'. On the left, there is a sidebar with 'Requ' and 'date' visible. The main content area shows 'General Information' and 'Contact Information' with an address: '123 Main Street, DeLand, FL 32723, US'.

Test, Monday

Person ID: 65114928 Reference Checks

Application Questions **E-References** Notices Hi

Requ >

date

General Information

Contact Information

123 Main Street
DeLand, FL 32723
US

STEP 8

Here you will be able to see the References the candidate entered (on the application, they were required to submit a minimum of 3). This information includes their name, contact information, and whether this is a Professional or Personal reference.

The screenshot shows a user interface for a reference entry. At the top, the name 'Jane Smith' is displayed. Below it are two tabs: 'Details' (which is selected and underlined) and 'Notices'. The main content area is titled 'CONTACT INFORMATION' with a pencil icon to its right. Under this title, the email 'humres@stetson.edu' and the phone number '123-456-7890' are listed. Below the contact info is a section labeled 'Address'. At the bottom, there is a 'Reference Type' section with the value 'Professional'.

STEP 9

If you would not like to reach out to certain references, such as a Personal reference if you only want Professional references, click the toggle on the right to Off to Inactivate them. Then, when you send out the e-references, the notices will not be sent to them.

This screenshot is similar to the one in Step 8, but it includes an additional element in the top right corner. A toggle switch is present, currently set to 'OFF' (indicated by a blue circle). To the right of the switch are the labels 'ON' and 'ACTIVATE'. The rest of the interface, including the name 'Jane Smith', the 'Details' tab, the 'CONTACT INFORMATION' section with email and phone number, the 'Address' section, and the 'Reference Type' set to 'Professional', remains the same.

STEP 10

Now, you are ready to send out the E-References. Whether you are on the Candidates page or within the candidate's profile, you will make sure the correct candidate is selected, and then click the Actions button, then select Send E-Reference Notification.

The screenshot displays a web application interface for managing candidates. At the top, a donut chart shows a progress of 7 out of 7, with a label 'First Interview : 2'. Below the chart, there's a table with columns: Name, Notices, Current Employee, Phone, E-References, and Status. The first row is selected, and the 'Actions' dropdown menu is open, showing options: Move to Second Interview (as needed), Move to Top Candidate, Send Notices, Print Apps, and Send E-Reference Notification (highlighted with a red box). The bottom of the interface shows pagination controls: First, Previous, 1, Next, Last, and a dropdown for 10 items per page.

Name	Notices	Current Employee	Phone	E-References	Status
Test, Monday	18/2025	No	386-822-8759	N/A	Ref
Test, Tuesday	18/2025	--		N/A	Ref
Test, Wednesday	18/2025	--		N/A	Ref

STEP 11

The first tab shows who the candidate provided as references. You can check or unselect which references you would like to reach out to.

The ones you inactivated previously will be unchecked here.

STETSON UNIVERSITY DASHBOARD

Home Tasks Recruiting

< Back

Send E-References

Cancel Next

1. SELECT REFERENCE 2. PREVIEW QUESTIONNAIRE 3. EMAIL NOTIFICATION

Select Reference

Candidate	Reference Already Submitted	Reference Email Will Be Sent To
Monday Test	N/A	☒ cmclallen@stetson.edu ☒ cmclallen@stetson.edu ☒ kschroeder@stetson.edu

First Previous 1 Next Last

Showing 1-1 of 1 items

STEP 12

Click Next

Cancel Next

ONNAIRE 3. EMAIL NOTIFICATION

	Reference Email Will Be Sent To
	☒ cmclallen@stetson.edu ☒ cmclallen@stetson.edu ☒ kschroeder@stetson.edu

STEP 13

The second tab allows you to preview the questionnaire that is sent to the references. This is a standard questionnaire that cannot be edited.

STETSON UNIVERSITY DASHBOARD

Home Tasks Recruiting

Send E-References

Cancel < Previous Next

1. SELECT REFERENCE ✓ 2. PREVIEW QUESTIONNAIRE 3. EMAIL NOTIFICATION

Basic E-References Questionnaire Candidates Monday Test Preview Only

REFERENCE QUESTIONNAIRE

Basic E-References Questionnaire

STEP 14

Click Next

Cancel < Previous Next

2. PREVIEW QUESTIONNAIRE 3. EMAIL NOTIFICATION

Preview Only

STEP 15

The third tab shows the email notification that is sent to each reference along with the questionnaire. This is also standard and does not need to be edited.

Viewing page as HiringManager_HR zzTest Stop Impersonating

STETSON UNIVERSITY DASHBOARD Search...

Home Tasks Recruiting

< Back

Send E-References Cancel < Previous Send E-Reference

1. SELECT REFERENCE ✓ 2. PREVIEW QUESTIONNAIRE ✓ 3. EMAIL NOTIFICATION

Email Notification Preview

Template Sample Reference Override

Dear <EReference_FName> <EReference_LName>:

Your contact information has been provided to us as an employment reference for <Applicant_FirstName> <Applicant_LastName> who has applied for the position of <Position_Title> at <Agency_Name>.

We would greatly appreciate your feedback on this candidate within the next 7 days.

STEP 16

Click Send E-Reference

Cancel < Previous Send E-Reference

3. EMAIL NOTIFICATION

Reference Override

STEP 17

The references will now be getting the email and questionnaire to complete for the candidate. You can track the progress of these on the Candidates page.

For the example below, no references have been completed yet out of the three that were requested. As these are completed, the number will update. At least two references are required to be completed.

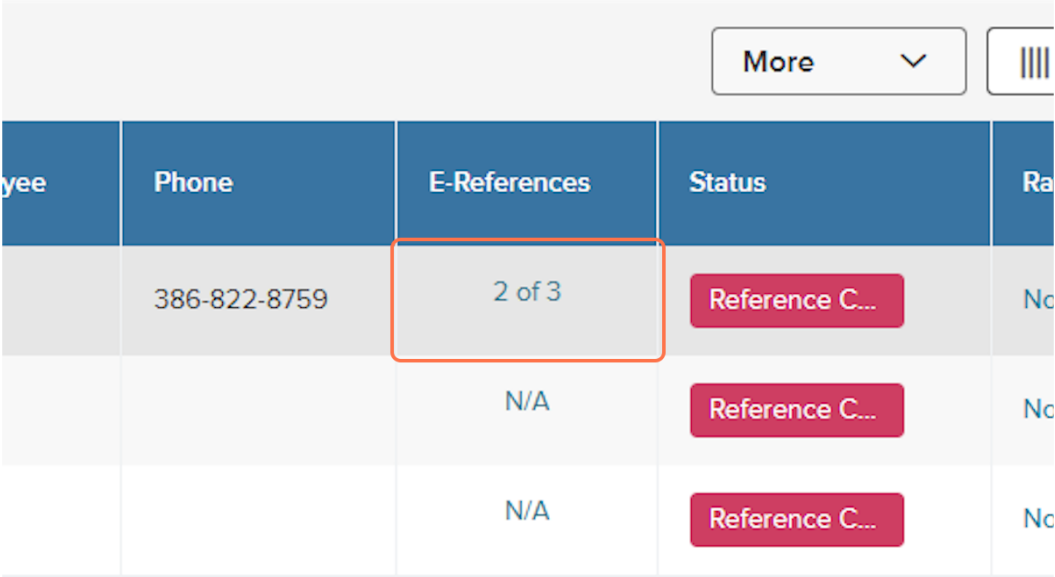
					More 	
Notices	Current Employee	Phone	E-References	Status		
	No	386-822-8759	0 of 3	Reference C...		
--			N/A	Reference C...		
--			N/A	Reference C...		

Items per page

Showing 1-3 of

STEP 18

Once the E-References have been completed, you can access these via the Candidates page by clicking on the number in the E-References column.

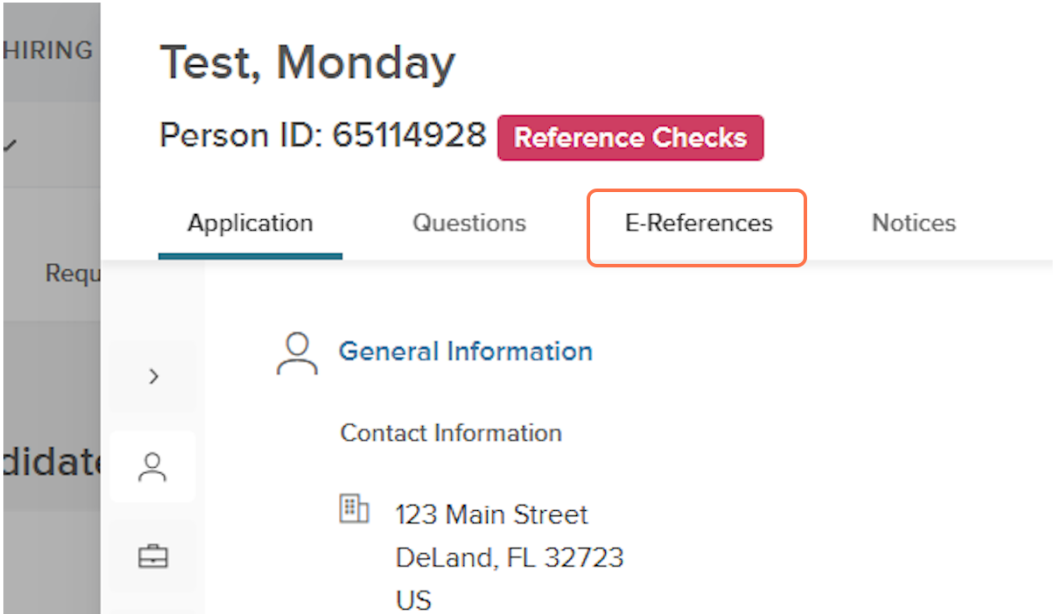


The screenshot shows a table with five columns: Employee, Phone, E-References, Status, and Rate. The 'E-References' column contains the values '2 of 3', 'N/A', and 'N/A'. The 'Status' column contains buttons labeled 'Reference C...'. The 'Rate' column contains the value 'No'.

Employee	Phone	E-References	Status	Rate
	386-822-8759	2 of 3	Reference C...	No
		N/A	Reference C...	No
		N/A	Reference C...	No

STEP 19

Or, if you are in the candidate's profile, you can go to the E-References tab.



The screenshot shows a candidate's profile for 'Test, Monday' with Person ID: 65114928. The 'Reference Checks' button is highlighted. The 'E-References' tab is selected and highlighted with an orange box. The 'General Information' section is visible, showing contact information: 123 Main Street, DeLand, FL 32723, US.

Test, Monday
Person ID: 65114928 **Reference Checks**

Application Questions **E-References** Notices

General Information

Contact Information

123 Main Street
DeLand, FL 32723
US

STEP 20

From here, you can review the information submitted by each reference.

Test, Monday Person ID: 65114928 Reference Checks

Application Questions **E-References** Notices History Notes

+ Add Reference

test1 test1 VIEW MORE

CONTACT INFORMATION

cmclallen@stetson.edu
test1

Address

Reference Type
Professional
✓ Submitted 11/18/2025
✓ Active Reference

REFERENCE QUESTIONNAIRE OFF ☒ ON ACTIVATE

1. In what capacity did you work with or know the candidate?
test
2. What was the candidate's job title, responsibilities, and approximate dates of employment?
test
3. Knowing the candidate's background and experience, what makes them well suited for this role?
test
4. Does the candidate conduct their dealings with others in a tactful and collegial manner? Can you share an example?
test
5. How does the candidate react in confrontational situations? Can you share an example?
test
6. What is one piece of advice you would give to help this individual be successful?
test
7. Was the candidate on time and consistently at work?
Yes
8. Would you hire this candidate again?
Yes
9. Is there anything else you would like to share about this candidate that has not been asked?
test