

**Candidate Referral from Third-Party**

- 1) Open referral email to determine what information is available on the Candidate
- 2) Reach out to the referring person/party, if further information is needed in order to establish relationship (contact information, etc.)
- 3) Upload the full resume with contact information into Crelate
  - a. See “INSTR Add a Candidate to Crelate”
  - b. Update any contact information in the Candidate profile
  - c. Insert any notes regarding best means of contact, referring person/party’s name, etc.
  - d. Enter Referral information in the correct field when entering the Candidate profile, connecting the Referrer’s profile to the Referral
- 4) Contact referring person/party for exploratory call to gather more information
  - a. Via email or phone call: Introduce yourself and how you obtained their information. Explore career/job opportunities.