

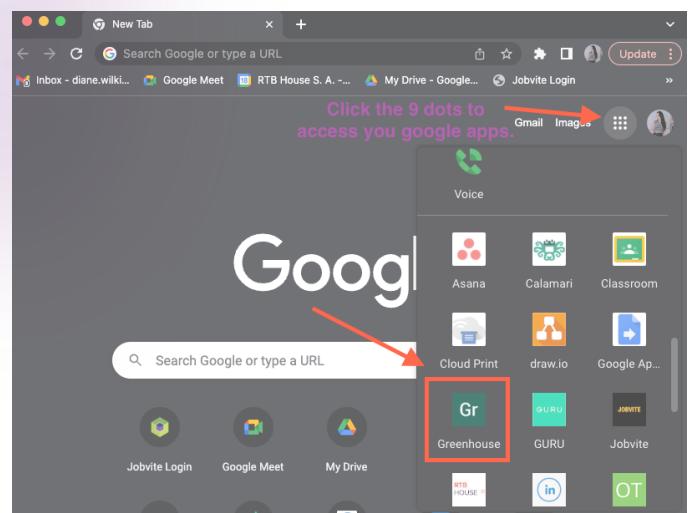
# Submitting Referrals with Greenhouse ATS

## ACCESS

### Log in to Greenhouse ATS

You may log in to Greenhouse through Google Apps by clicking on the 9 dots on the top right-hand side of the page in either your Gmail Inbox or by opening a new tab (as shown). Scroll down and select the Greenhouse icon.

This will automatically log you in and take you to your main dashboard.



## NAVIGATION

The screenshot shows the 'My Dashboard' page. In the top right corner, there's a search bar and some navigation icons. Below it, the 'Add a Referral' section has a note: 'Add a new referral for any open job. Not sure which job? Pick the closest option and make sure to leave a note for the hiring team!'. A red box highlights the blue '+ Add a referral' button. To the right of this section is a sidebar titled 'My Tasks' with sections like 'Needs Decision', 'Forms To Send', 'Candidates to Schedule', etc., each with a count (e.g., 1). Below the tasks is a 'Helpful Links' section with links to 'View Internal Jobs', 'Email Your In-House Contacts', and 'Visit Our Help Center'. At the bottom right of the dashboard is a green 'Personalize Dashboard' button.

## Adding a referral

Scroll down to the ‘Add a Referral’ section. Click on ‘+ Add a Referral’ button, then click ‘Choose File’ to upload your Referral’s resume or LinkedIn profile downloaded as a .pdf. Information from the uploaded document will be parsed into the system.

## SUBMISSION

### Select a Job

In the Select a Job section, click on the drop-down menu under ‘Job,’ scroll down and select the job you are referring the candidate for.

This screenshot shows the 'Select a Job' interface. It includes a note: 'Not sure which job? Pick the closest option and make sure to leave a note for the hiring team!' and a link to 'View Referral Program'. There are three dropdown menus: 'Office' (with a placeholder 'Filter jobs by office...'), 'Department' (with a placeholder 'Filter jobs by department...'), and 'Job' (which is highlighted with a red box and has a placeholder 'Select a job...').

This screenshot shows the 'Name & Company / Info' section. It includes fields for 'Name & Company' (First name, Last name, Current Company, Current Title), 'Info' (Email, Phone, Social media, Websites), and 'Education' (School Name, Degree, Discipline, Start Date, End Date). Each field has a red box highlighting its input area.

## SUBMISSION

### Name & Company / Info

In the Name & Company section and Info section, check that your Referral’s name, company, title, email and included information is correct.

## S U B M I S S I O N

**Details**

Resume \* [Attach, Dropbox, Google Drive, Paste](#)

Cover letter [Attach, Dropbox, Google Drive, Paste](#)

Relationship \* [How do you know this person?](#)

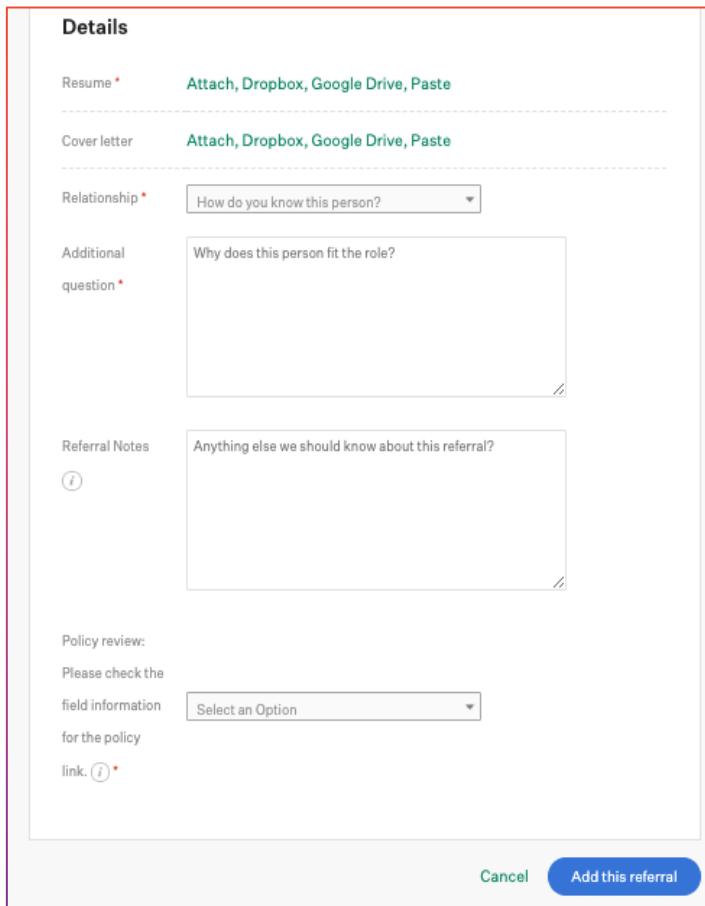
Additional question \* [Why does this person fit the role?](#)

Referral Notes [Anything else we should know about this referral?](#)

Policy review:  
Please check the field information for the policy link. [\(i\)](#) \*

Select an Option

[Cancel](#) [Add this referral](#)



## Details

In the Details section, under

- ‘Resume\*’ - Confirm the document uploaded is attached.
- ‘Relationship\*’ - Click on the drop-down menu and state how you know the person you are referring.
- ‘Additional question\*’ - State the reason you believe the person is a fit.
- ‘Policy review\*’ - You will be asked to acknowledge review of the referral policy by clicking on the drop-down menu and selecting ‘I acknowledge.’ The referral policy can be found [here](#).

Click on the button, ‘Add this referral.’

## S U C C E S S

### Confirmation

You will see a green confirmation at the top of your screen and receive a confirmation email. Your referral is now submitted and will be reviewed by the Talent Acquisition Team.

We have received your referral to Agency Sales Director, West [Inbox x](#)

12:32 (10 minutes ago) [Star](#) [Reply](#) [Forward](#)

c

Hi!

We would like to thank you for sending the recommendation.

has been submitted to Agency Sales Director, West position.

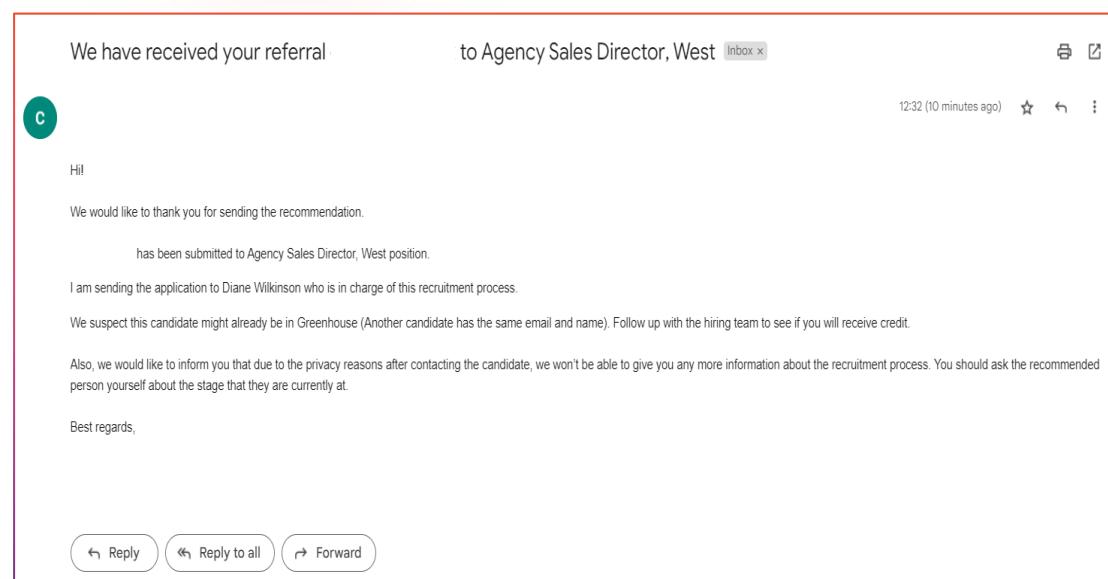
I am sending the application to Diane Wilkinson who is in charge of this recruitment process.

We suspect this candidate might already be in Greenhouse (Another candidate has the same email and name). Follow up with the hiring team to see if you will receive credit.

Also, we would like to inform you that due to the privacy reasons after contacting the candidate, we won't be able to give you any more information about the recruitment process. You should ask the recommended person yourself about the stage that they are currently at.

Best regards,

[Reply](#) [Reply to all](#) [Forward](#)



## POTENTIAL ISSUES

### Duplicates

If your Referral is suspected to be a duplicate (similar profile already in Greenhouse), you will be notified in the confirmation email. Please follow up with the person mentioned in the email to confirm if you get credit.



## POLICY

### Referral Bonus Requirements

As per the referral program policy, you won't be able to see the Referral's current stage or any progress in the recruitment process - this is confidential information.

If your Referral gets hired, you will be eligible for the Referral bonus (as stated in the Referral Program policy).



#### Eligibility requirements include:

- Referred hires must be employed for a minimum of three months.
- You must know the referral. See the policy document for details.
- Referrals must not be actively engaged in the recruitment process or already referred.

Detailed information about the referral program policy can be found at this [link](#).