

Notes – Employment Reference Request

1. Query requesting an employment reference comes into the HR Advice queue and an Advisor picks it up
2. Advisor will find ex/employee in PFP by searching for their name and clicking the 'Include terminated work relationships' box
3. Once ex/employee has been found, Advisor will open the '[Reference Template](#)' and start populating the information
 - I. 'Period of employment' can be found at the top of the employment page in PFP.
 - II. 'Hire Date' is the day they joined.
 - III. 'Termination Date' is the day they left the business
4. When the template has been populated with the correct information, the Advisor will save as a PDF and respond back to the query closing it down ensuring they have put the ex/employee as the 'Contact About' in Service Cloud and selecting the correct product 'Reference Requests'.

Notes – Mortgage/Rental Reference Request

1. Query requesting a mortgage/rental reference comes into the HR Advice queue and Advisor picks it up
2. Advisor will check that the employee's consent is attached. If not, they will contact employee to ensure they are aware of this reference being requested and give their consent for it to be released.
3. Once the employee's consent has been given, Advisor will find employee in PFP and open the '[Mortgage Reference Template](#)' and start populating the information
 - I. Employee start date is 'Hire Date' in PFP
 - II. 'Person Type' will tell you if the employee is Perm/FTC

- III. Their salary and any other allowances can be found by going to 'Navigator' and 'Element Entries'
4. Once all fields on the template have been populated, Advisor will save as a PDF and respond back to the query closing it down ensuring they have put the employee as the 'Contact About' in Service Cloud and selecting the correct product 'Reference Requests'.