

Crosschq 360 Reference Survey: End User Resource Guide

This resource document compiles key information from the Crosschq online knowledge base to serve as a quick reference and support tool. This guide provides a structured summary and workflow extracted from the knowledge base articles. Users are still encouraged to refer to the original articles for additional resources and to access the included links for the most current and detailed information to support further individual training. This document is designed as a supplemental resource, allowing you to quickly access key information without needing to navigate through each individual knowledge base article, while still providing the option to explore the full resources as needed.

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Additional References & Online Access For further details and real-time updates, visit the official Crosschq knowledge base:

- [How to Use the Crosschq 360 Module](#)
- [Using Crosschq as a Candidate](#)
- [Using Crosschq as a Reference](#)

Crosschq 360 Reference Surveys – Downloadable Library

[360 Reference Surveys](#)

Getting Started

Creating An Account

How to create an organization account

Follow these steps to create an organization account with Crosschq:

1. As the administrator for the organization, you'll receive an email message containing a link to create a new organization account with Crosschq.
2. Click that link to access the **Create your account** page (see the figure below). On that page, enter your first and last name, company name, phone number, email address, and password.

Create your Account

You will be the primary administrator for this account.

First Name	Last Name
Company Name	 ▼ (555) 555 5555
Email	••••••••
<input type="submit" value="Submit"/>	

3. Click the **Submit** button, and look for a Crosschq email message that confirms the creation of your account. Click the link in that email message to access the login page.

crosschq

Organization Login.

Please login here to access your **organization account**.

Email *

Password *

[Forgot your password?](#)

Login

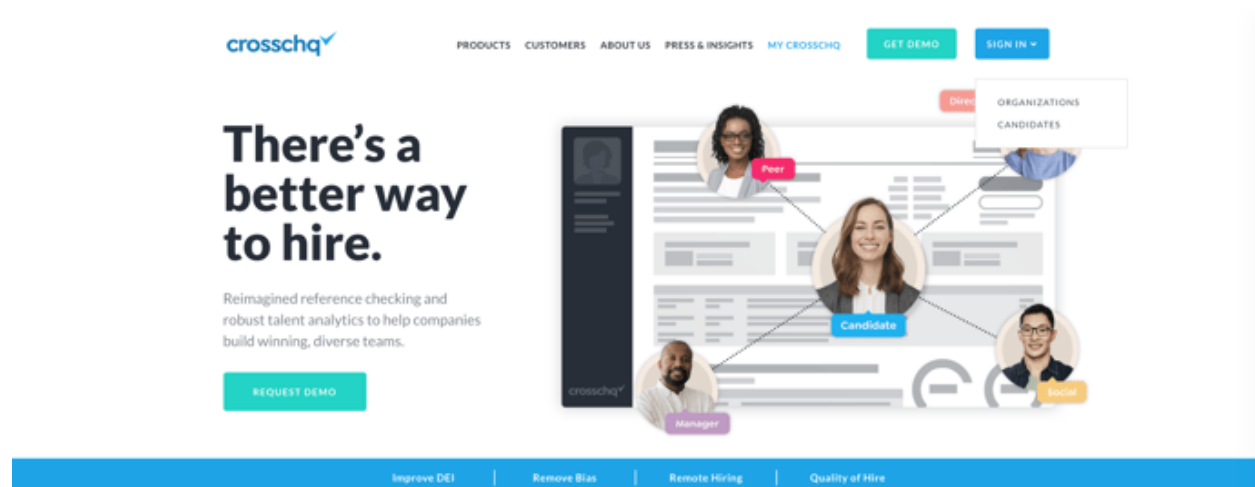
© 2020 Crosschq. All rights reserved. [Privacy](#) · [Terms of Service](#) · [Feedback](#)

4. Enter the **Email** address and **Password** for your account. If at any point you forget your password, click [here](#) for directions on how to recover.

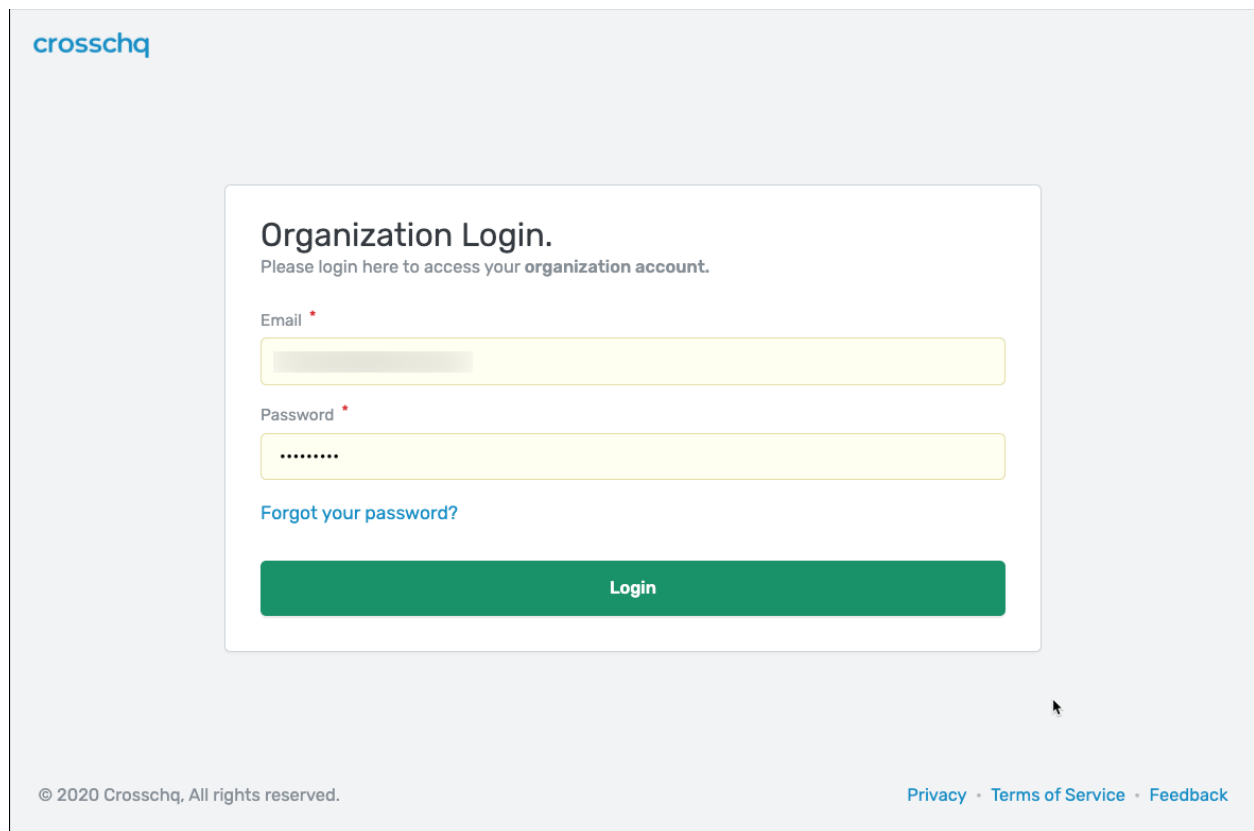
Log into Crosschq Organizations

How to log in to your Crosschq Organization

To log in, go to www.crosschq.com and click the **Sign in** button in the upper-right corner, as shown in the figure below. In the drop-down panel—beneath **Organizations**—click the **Log In** button. (If you don't already have an account, visit [this page](#) for directions on how to create an account.)



On the login page, enter your **Email** address and **Password**, then click the **Login** button.



The screenshot shows the Crosschq Organization Login page. At the top left is the Crosschq logo. The main heading is "Organization Login." followed by the instruction "Please login here to access your organization account." Below this are two input fields: "Email" and "Password", both marked with a red asterisk. The Email field contains a blurred placeholder. The Password field contains a series of dots. Below the Password field is a blue link "Forgot your password?". At the bottom of the form is a green "Login" button. The footer contains the copyright notice "© 2020 Crosschq. All rights reserved." and three links: "Privacy", "Terms of Service", and "Feedback".

crosschq

Organization Login.

Please login here to access your organization account.

Email *

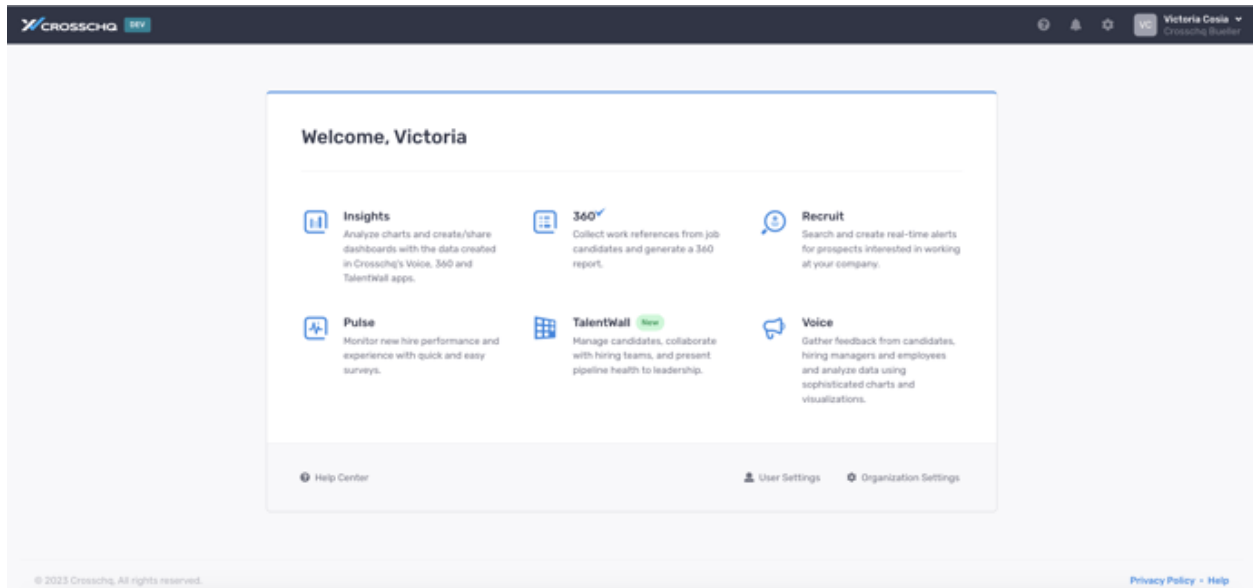
Password *

[Forgot your password?](#)

Login

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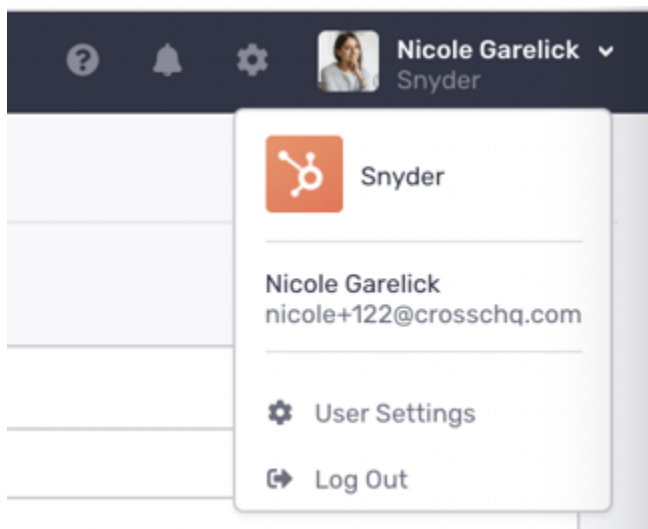
When you log in to Crosschq you will be taken to your organization's homepage. Here you will see the modules your organization has access to. If your organization has only one active module within Crosschq, you will be taken to that module upon login. (You can see modules that are coming soon in gray.) To access a module, select the module you want to access. You can access the main menu using the top menu.



User Settings

How to Manage User Settings

To access your user settings, click your name in the upper-left corner, then click **User Settings**.

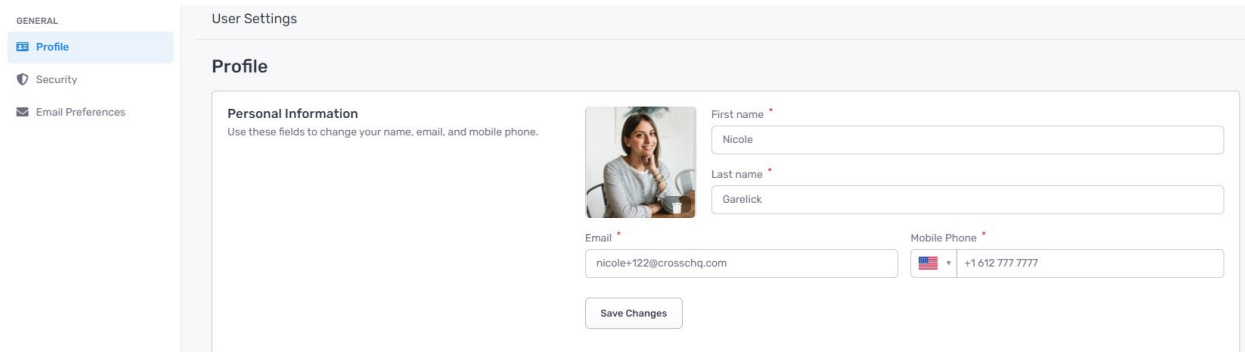


Your user settings include:

- [Profile](#)
- [Security — Change your password](#)
- [Email Preferences](#)

Profile

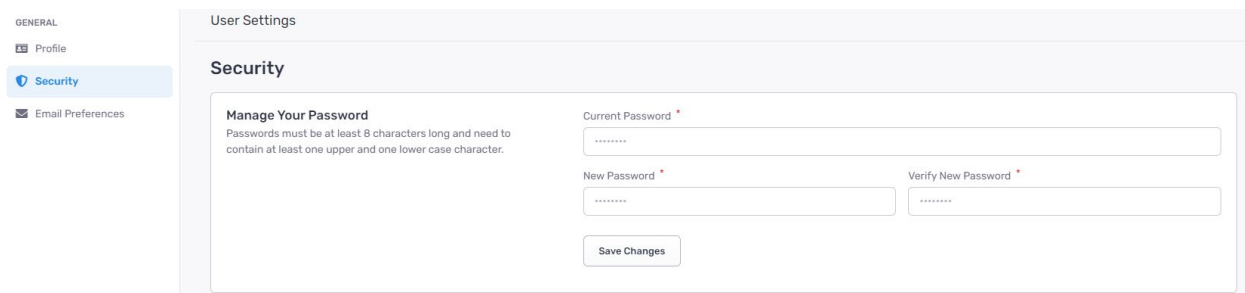
Click the **Profile** menu item to edit your name, email, and phone number. Remember to click to **Save Changes** button.



The screenshot shows the 'User Settings' page with the 'Profile' tab selected. On the left, a sidebar lists 'GENERAL', 'Profile' (active), 'Security', and 'Email Preferences'. The main content area is titled 'Profile' and contains a 'Personal Information' section. It includes a profile picture of a woman, a 'First name' field with 'Nicole', a 'Last name' field with 'Garelick', an 'Email' field with 'nicole+122@crosschq.com', and a 'Mobile Phone' field with a dropdown for the country (US) and the number '+1 612 777 7777'. A 'Save Changes' button is at the bottom.

Security — Change your password

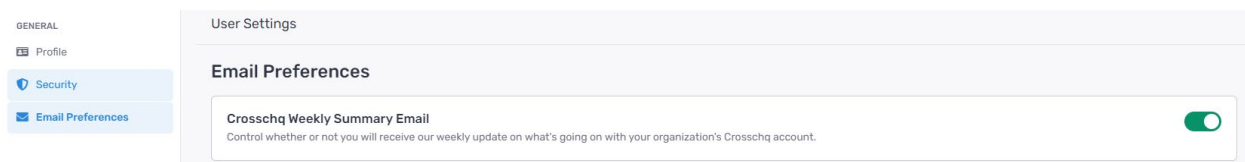
Click the Security menu item, then enter your New Password. Carefully enter the same password in the Verify Password field, and then click the Save Changes button.



The screenshot shows the 'User Settings' page with the 'Security' tab selected. The sidebar is the same as the previous page. The main content area is titled 'Security' and contains a 'Manage Your Password' section. It includes a note: 'Passwords must be at least 8 characters long and need to contain at least one upper and one lower case character.' There are three input fields: 'Current Password', 'New Password', and 'Verify New Password'. A 'Save Changes' button is at the bottom.

Email Preferences

To opt into the Crosschq Weekly Summary email distribution, click Preferences and enable the green slider. Click again to opt out.



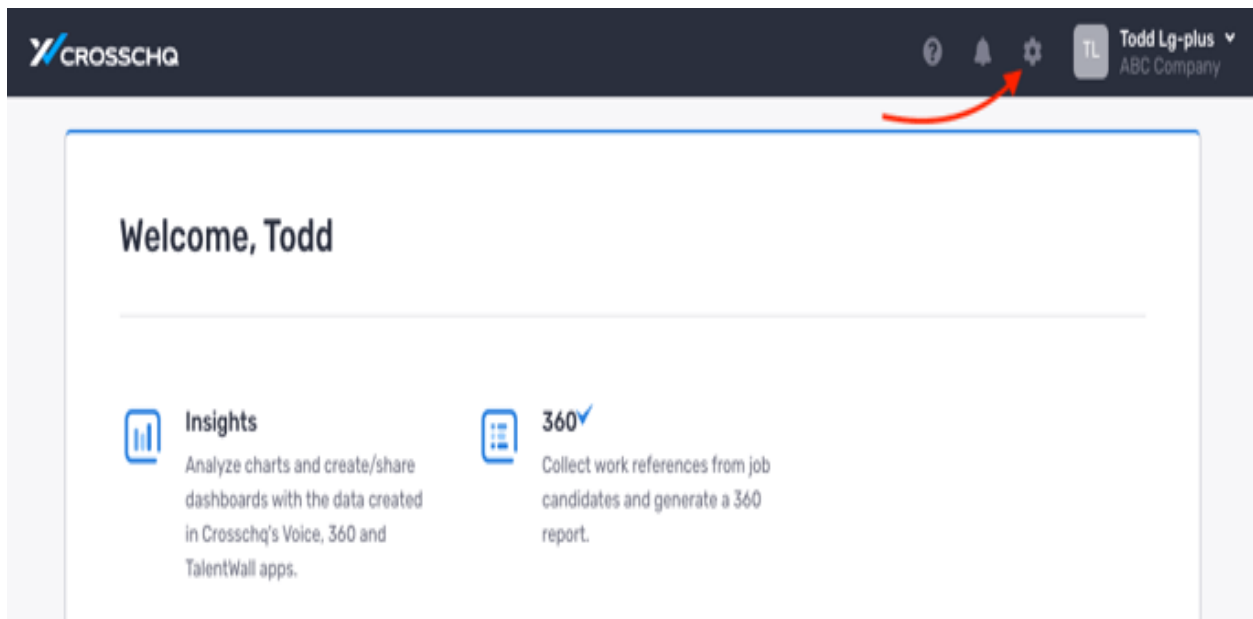
The screenshot shows the 'User Settings' page with the 'Email Preferences' tab selected. The sidebar is the same as the previous pages. The main content area is titled 'Email Preferences' and contains a 'Crosschq Weekly Summary Email' section. It includes a note: 'Control whether or not you will receive our weekly update on what's going on with your organization's Crosschq account.' There is a green toggle switch that is currently turned on.

Getting Started with Crossschq 360

Managing Crossschq 360 Settings

How to manage Crossschq 360 settings

Users with administrative permissions can edit Crossschq 360 settings. To edit these settings, click the Organization Settings item in the top-right menu using the settings wheel.



The Crossschq 360 Settings menu contains a number of items for you to explore and edit:

- [Request Settings](#)
 - [Notifications Sent to Candidate](#)
 - [Notification to Team Members](#)
 - [Request Conclusion](#)
 - [Request auto cancel](#)
 - [Private candidates](#)
- [Surveys](#)
 - [Survey Library](#)
 - [Diversity/Bias Modules](#)
 - [Custom Questions](#)
 - [Optional Questions](#)
 - [Language Settings](#)

- [Templates](#)
- [360 Report Settings](#)

Reference Request Settings

Notifications Sent to Candidate

Notifications Sent to Candidate

Notify Candidates via SMS
☒

Send text messages to the candidate for reference requests and reminders (in addition to emails that are always sent)

By enabling this slider you confirm that you will contact each candidate to obtain their consent to receive SMS messages from Crosschq.

Past Due Reminder Schedule

Use this setting to select when past due reminders are sent to candidates and references.

Mark all request past due after:
24 hours

How many reminders?
2

Reminder frequency:
Every 2 days

Notify Candidates via SMS - you can enable/disable Candidate SMS messages

Past Due Reminder Schedule - you can customize the cadence at which due date reminders are sent to candidates.

- Mark all requests past due after... : Select after how many hours the request will be considered past due (you can choose between 24h, 48h, and 72h);
- How many reminders: Select the number of times candidates will be reminded to complete their surveys;
- Frequency: Select how often candidates will be reminded;

Notifications to Team Members

Email notifications can be sent to team members when a reference request changes its status. In this section, you can check/uncheck the boxes to enable/disable team member notifications for the requestor and/or Hiring Manager.

If you have enabled the Slack integration with Crosschq, you can also assign specific Slack channels to receive these notifications. Read [this article](#) to learn more about the Slack integration.



Notifications to Team Members

Use these settings to manage notifications sent to users in your organization.

Request Status

Notifications can be sent to users when 1) a reference request changes status; 2) when we detect potential reference fraud; and/or 3) when a note gets added to a 360 report. Notifications can be sent directly to a user via email or Slack direct message (DM), or they can be sent to a public Slack channel. To set up the integration for Slack, go to [Organization Settings > Connectors > Slack](#).

Note: Only Slack users who have the same email address in their Crosschq account will receive DMs.

NOTIFICATION	REQUESTOR	HIRING MANAGER(S)	SLACK CHANNELS
Request Created	☐	☐	Channel name
Request Accepted/Rejected by Candidate	☐	☐	Channel name
Request Past Due	☐	☐	Channel name

Request Conclusion

Here you can enable the auto-conclude feature for Crosschq requests. Click [HERE](#) to learn more about this settings.



Request Conclusion and Cancellation

Use this setting to manage automatic request conclusion and cancellation.

Auto-conclude Requests

Use this setting to have Crosschq automatically conclude reference requests before all references have been collected. A request will be concluded and a Crosschq Report generated when all of the following conditions are reached.



Completed References

- 1 +	Self-reference	completed	?
- 1 +	Any Relationship	completed	🗑️

+ Add Relationship

- 7 +	day(s) have elapsed
-------	---------------------

Request auto cancel

Use this setting to have Crosschq automatically cancel unaccepted reference requests. A request is unaccepted when the candidate does not access the Crosschq system.

Enable the toggle switch and select the days that must have elapsed for the requests to auto-cancel. Check the box to notify candidates when the request is canceled.

Auto-cancel Requests

Use this setting to have Crosschq automatically cancel unaccepted reference requests. A request will be canceled when the following condition is reached.



4 days	▼
--------	---

☐ Notify candidates when requests are being canceled.

Private Candidates

Set candidates as "Private" by default. This setting will set candidates as "private" whenever a new request is created. Private candidates are only accessible to the requestor and hiring managers who are assigned to the request, and super admins.

Private Candidates

Set Candidates as "Private" by Default

Use this setting to set candidates as "private" whenever a new request is created. Note: private candidates and their 360 Reports can only be viewed by the requestor/recruiter/hiring manager on the request, or by Super Admins.



If another user wants to view a private candidate's report and does not meet one of these conditions, use the secure sharing feature to share the report. Click [HERE](#) to see how to share private candidate reports.

Surveys

Survey Library

We have 3 survey libraries: 1) Corporate, 2) Education, and 3) Healthcare Provider. We've automatically assigned each library the list of surveys that would most likely be used by a company in that industry sector (note: a survey can appear in multiple libraries or in a single library). The default library for new accounts is Corporate. You can change the libraries on an account by contacting support@crosschq.com.

To preview a survey click the reference or self buttons to preview each survey and review the questions. To mark a survey as inactive, click the trash can on the far right-hand side, this way it will not be available for team members to use when creating new reference requests. To re-add inactive surveys, click the add more surveys button. As Crosschq releases new surveys, you will be able to add them to your account by clicking the Add More Surveys button and selecting from there. You can search for relevant surveys by using the search feature within the Surveys section. NOTE: You must select at least one survey to be active.

Crosschq 360

Surveys

Job Competency Surveys

Custom Modules

Optional Modules

Diversity / Bias Modules

Language Settings

Job Competency Surveys

Select the job competency surveys that your team members can use when creating new reference requests. At least one survey must be selected.

Language

Search by name



Add Surveys (5)

JOB COMPETENCY SURVEY	LANGUAGES	ASSIGNED MODULES	PREVIEW
Adult Caregiver - Team Member	English Spanish	--	References Self
Biostatistician - Manager	English Spanish Chinese	--	References Self
Biostatistician - Team Member	English Spanish Chinese	--	References Self
Brand Marketer - Manager	English Spanish	--	References Self
Brand Marketer - Team Member	English Spanish	--	References Self
Business Development Representative - Manager	English Spanish Chinese	--	References Self

Custom Modules are also available to be built by our support team, to inquire reach out to support@crosschq.com.

Optional Modules include the Workplace safety module, the Remote Work module (which was designed for remote work environments during COVID), and the Culture module which can be enabled by selecting the slider within your settings and toggling on.

Surveys

[Job Competency Surveys](#) [Custom Modules](#) **[Optional Modules](#)** [Diversity / Bias Modules](#) [Language Settings](#)

Optional Modules

The modules below can be turned on/off for your account. Modules turned "on" will be used in all reference requests. To learn more about these modules please contact us at support@crosschq.com.

MODULE	LANGUAGES	PREVIEW
Workplace Safety These optional survey questions ask each reference potentially sensitive questions about the Candidate's behavior in the workplace.	English Spanish Chinese	References Self ☐
Remote Work These optional survey questions ask the candidate and reference about the candidate's ability to work remotely.	English Spanish Chinese	References Self ☒
Culture This optional survey question asks each reference about the impact the candidate had on company culture.	English Spanish Chinese	References Self ☐

Diversity/Bias Modules

Crosschq offers an optional diversity survey module that collects gender, age, and ethnicity from candidates and references. The responses received to these optional questions allow Crosschq to analyze whether bias has an impact on reference responses and proactively make changes to surveys and reports if needed. This information is then shared with Crosschq customers as it is available.

It is important to note that diversity responses received from candidates and references will not be included in the Crosschq 360 report and are not available to recruiting or hiring managers during the hiring decision process. Whether or not to include the diversity module in surveys is a setting that Crosschq users control within the organization settings tab.

To enable this feature click on the Diversity/Bias Modules and select the preferred setting for your organization. There are two options:

Full - Demographic information is collected and stored by name for candidates and anonymously from references. This option must be selected when using Crosschq's Insights Diversity & Inclusion product.

Anonymous - Demographic information collected anonymously from candidates and references.

The default setting for all accounts is FULL. Select the setting that is preferred for your organization and it will automatically be updated for your account.

Surveys

Job Competency Surveys Custom Modules Optional Modules **Diversity / Bias Modules** Language Settings

Diversity/Bias Modules



The questions in this module are used to 1) validate that Crosschq's referencing collection process does not introduce unintended bias into your hiring process; and 2) to provide Diversity and Inclusion reporting in Crosschq's New Hire Analytics product. The responses to these questions are not shared with your organization during the hiring process, and providing this information is optional for both the candidate and reference.

MODE	LANGUAGES	PREVIEW
☒ Full Demographic information is collected and stored by name for candidates and anonymously from references. This option must be selected when using Crosschq's New Hire Analytics Diversity & Inclusion product.	English Spanish Chinese	References Self
☐ Anonymous Demographic information collected anonymously from candidates and references.	English Spanish Chinese	References Self

Custom and Optional questions

Access the following articles to learn more about how to:

- Create your [Custom Questions](#) and add them to the Crosschq surveys;
- Enable Crosschq predefined [Optional Questions](#).

Language Settings

Crosschq offers English, Arabic, Mandarin, French, German, Italian, Japanese, Korean, Portuguese, and Spanish surveys within our reference-checking module, allowing candidates and references to choose their preferred language when completing their reference surveys.

Your reports will continue to be provided in English except for open-text answers, which can be automatically translated at the click of a button. You can control what languages to enable within your settings. Additional languages will be added to our survey library in 2022-2023.

To enable surveys in other languages, click Language Settings within the Survey section, and select the checkbox next to the language you want to enable.

[Crosschq 360](#) > Survey

Surveys

Survey Library Custom Questions **BETA** Optional Questions Diversity / Bias Questions **Language Settings**

Multi-Language Survey Support

Use this setting to select the languages that can (optionally) be used by candidates and references when completing their surveys. Note that English will always be available and cannot be unselected.

☒ English ☒ Arabic ☒ Chinese ☒ French ☒ German ☒ Italian ☒ Japanese ☒ Korean
☒ Portuguese (Português) ☒ Spanish

You will be able to view which surveys are available in that language in your survey library.

Crosschq 360 > Survey

Surveys

[Survey Library](#) [Custom Questions](#) [BETA](#) [Optional Questions](#) [Diversity / Bias Questions](#) [Language Settings](#)

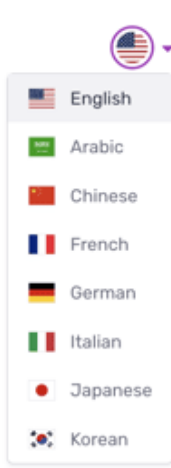
Survey Library

Select the job competency surveys that your team members can use when creating new reference requests. **At least one survey must be selected.**

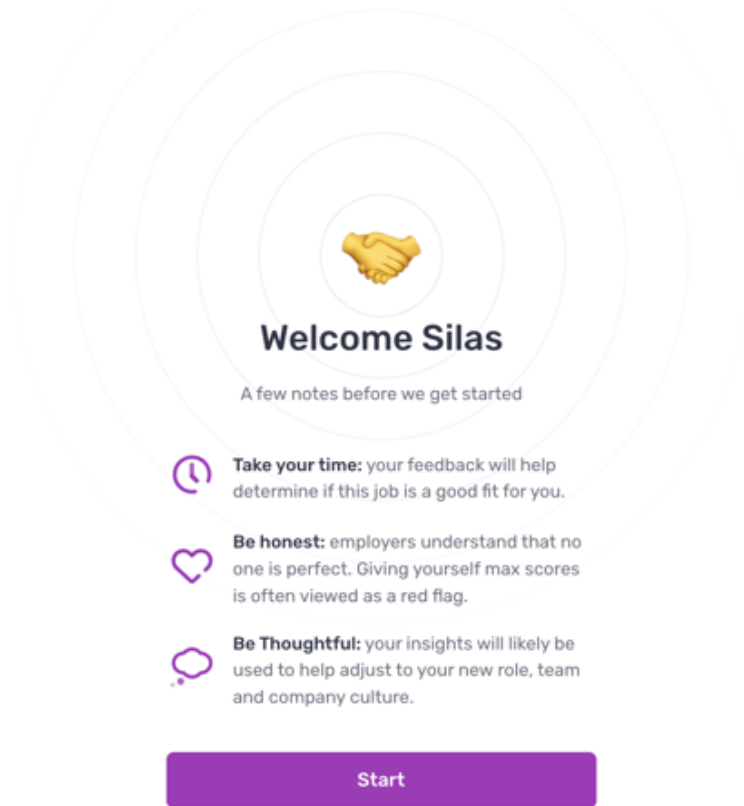
Filter by language Search by name [Add Surveys \(0\)](#)

JOB COMPETENCY SURVEY ▾	LANGUAGES	CUSTOM QUESTIONS	PREVIEW
Customer Success - Manager	Spanish German English Italian French Korean Japanese Chinese	--	References Self
Customer Success - Team Member	Spanish German English Italian French Korean Japanese Chinese	--	References Self
Data Scientist - Manager	English Spanish Chinese	--	References Self

Candidates and references will then be able to adjust the language within the survey.



- English
- Arabic
- Chinese
- French
- German
- Italian
- Japanese
- Korean



Welcome Silas

A few notes before we get started

- Take your time:** your feedback will help determine if this job is a good fit for you.
- Be honest:** employers understand that no one is perfect. Giving yourself max scores is often viewed as a red flag.
- Be Thoughtful:** your insights will likely be used to help adjust to your new role, team and company culture.

[Start](#)

If you access the report within the Crosschq app, you will see that the open-text answers show up in the language they were entered. However, you can translate the answers into English by simply clicking the *translate* button.

Templates

Templates are utilized to manage Crosschq within an ATS connector or when you want to quickly select a Crosschq template when creating a reference request in the platform. To create a Crosschq template, select Create New Template. Enter the required information such as template name, ATS Tag if required, and create a description of the template.

Within the Request Settings section, add in the position, select the appropriate survey, configure the number, and type of references you want to be associated with this request. Please note, the relationship type can either be specified or you can select any relationship type and let the candidate determine the type of reference.

From there, add in optional hiring manager information. Finally, you can create custom emails or text messages associated with each template by filling out the custom notifications section. When you are done, select Create Template and this will automatically be linked to your ATS.

Additionally, you can add customized notes to each specific reference-request i.e. "Please provide a manager reference from X company."

You can also enable auto-conclude for specific templates rather than setting an overall rule for all requests. Go to Organization Settings, Templates, and then select the template that you want to set up an auto-conclude rule for. From here, click edit. Then you can set the specific auto-conclude rule for this template.

Edit Template

Template Settings (required)

Template Name * General/Universal - Manager ATS Tag general/universal-manager

Description * A person that uses the General/Universal - Manager job role.

Request Settings (required)

Position * General/Universal - Manager Survey * General/Universal - Manager

References to Request

Number of References	Relationship Type	Add note
2	Managers	Add note
2	Direct Reports	Add note
2	Colleagues/Peers	Add note

[Add Reference](#)

Auto-conclude Reference Request Override (optional)

This template is currently set to use your account's Auto-conclude requests setting. You can override this rule with this slider. ☒

Completed References

Number of References	Relationship Type	Completed
7	Any Relationship	completed

[Add Relationship](#)

Add

Number of References	Add note
22	Should have stopped

Notifications (optional)

Include a custom email message for all candidates that apply with this template

Add a custom message

Include a custom SMS message for all candidates that apply with this template

Add a custom message

0 / 500

Save Changes

At any point, if you need to edit or delete a template select the three dots next to the template and you can manage from there. Here you will be able to review the list of active templates you have available for usage.

Templates

Templates are reference request configurations that are used by ATS integrations and/or to quickly create manual requests. [Create New Template](#)

TEMPLATE / SURVEY	POSITION	ATS TAG	RELATIONSHIPS
Marketing Managers (1) Product Marketing - Manager	Marketing Manager	MarketingManagerRefReqs	1 Managers 2 Direct Reports 1 Mentors
Marketing Manager (1) Brand Marketer - Manager	Marketing	X	1 Managers 1 Managers 1 Managers

Edit Template
Delete Template

360 Report Settings

On this settings page, you can enable or disable various alerts by clicking the toggle for each alert. Any alerts that you enable will appear in the Crosschq Candidate report.

For the Reference Average Threshold, enter a number in the field that represents the threshold for the number of candidate references. An alert will appear in the report if the calculated Reference Average from one or more of a candidate's references falls below this threshold.

Crosschq 360

Report Alerts

Use these settings to control the alerts that are displayed in the Candidate's Crosschq Report.

Reference Average Threshold Alert
The Candidate's Crosschq Report will display an alert if the calculated Reference Average from one or more of a Candidate's references falls below this threshold.

Threshold
2.9

Termination Alert
The Candidate's Crosschq Report will display an alert if one or more references indicate that a Candidate's employment was terminated.

Code of Ethics Alert
The Candidate's Crosschq Report will display an alert if one or more references do not select **Strongly Agree** when asked if the Candidate has a strong code of ethics.

Declined Request Alert
The Candidate's Crosschq Report will display an alert if one or more people declined the Candidate's request for a reference.

Rehire/Recruiting Alert
The Candidate's Crosschq Report will display an alert if one or more references state that they would not recommend the candidate if their company were recruiting.

Potential Fake Reference Alert
The Candidate's Crosschq Report will display an alert if the candidate and/or any reference either uses the same IP address OR if they are using the same PC or mobile device to complete a survey. NOTE: there are many valid reasons for the candidate/reference to share the same IP address (for example, if they are working in the same office). However, there are few legitimate reasons for a candidate/reference to be using the same PC or mobile device. If the hiring manager has concerns, we highly recommend they reach out to the reference in question to verify authenticity.

Potential Workplace Safety Issues Alert
The Candidate's Crosschq Report will display an alert if one or more references indicate that the Candidate has previously engaged in activities that could affect workplace safety.

360 Report Reference Anonymization

You can also choose to anonymize reference information, which you can adjust so only certain users see PII.

360 Report Reference Anonymization
Use this setting if you would like to remove the reference's name, email, and phone number from Crosschq 360 Reports.

Anonymize Reference's Name, Email, and Phone Number
This setting will remove reference PII (name, email, phone) from Crosschq 360 reports. Reference PII will also be removed from the Request Management and Candidate Profile screens.

All Users

Note: This will only affect PDF reports of those requests created after enabling this feature.

PDF Download

Enable this setting to allow completed/concluded 360 reports to be downloaded as a pdf.

PDF Download

Enable PDF Generation
Use this setting to enable the creation of a PDF Crosschq 360 report when requests are completed or concluded. PDF reports are convenient for sharing but are not secured with an account login.

AI Summary *{A feature soon to be added}*

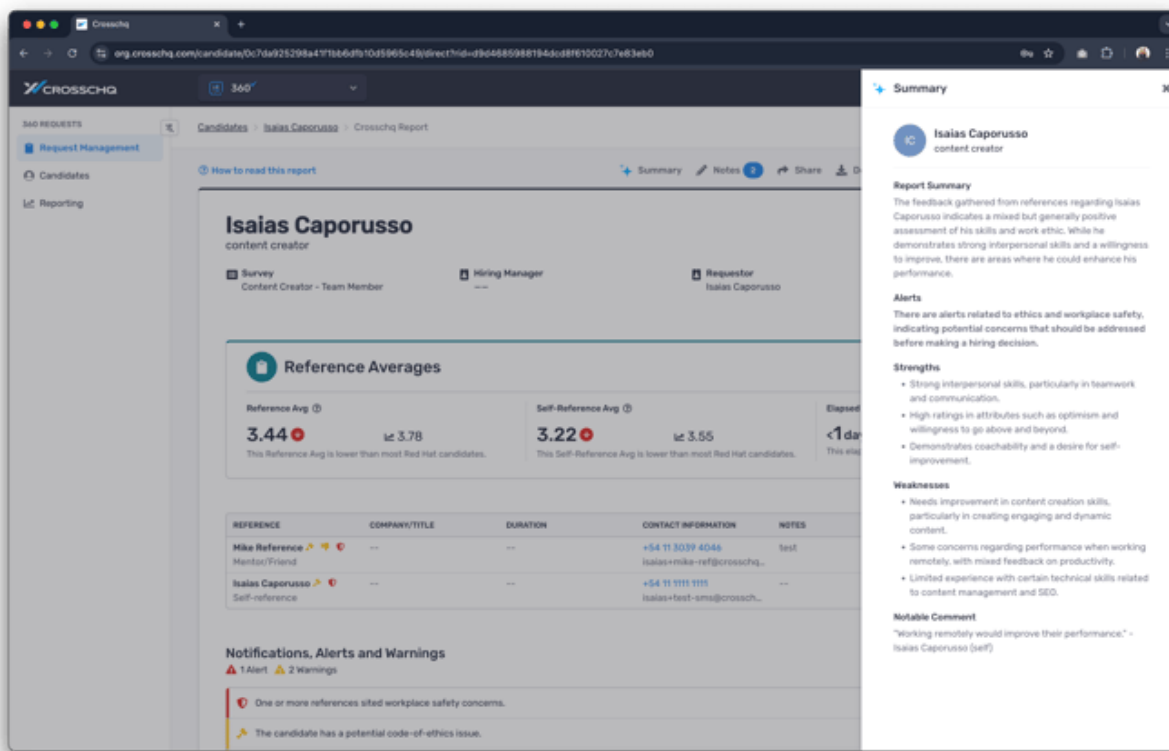
Enable this setting to enhance Crosschq 360 reports with an AI summary. This feature provides an easily digestible summary of a candidate's Crosschq report.



360 Report AI
Use this setting to allow your team to leverage AI in the report.

AI Summary
Use this setting to generate quick summaries of your 360 Reports using AI.

Below is a preview of the summary. This feature is off by default for all customers and needs to be enabled to be utilized.



PDF strategy and User Permissions

Overview on Report Sharing and User Permissions

Sharing Reports

Within Crosschq, there are two ways to share reports with others in your organization. The first is Securing Sharing.

Securing Sharing allows users to securely share Crosschq reports within the platform, while also allowing the ability to track who has accessed and reviewed the report. Additionally, users can add notes to a report in order to provide comments or additional information.

To share a report within Crosschq, users select the share button and enter the email address of the person they want to share the report with. If the person they are sharing the report with doesn't have a Crosschq account, they are invited to create a Viewer account upon receiving the report. When a report has been shared, they'll be able to see who the report has been shared with and who has viewed the report.

The screenshot shows the Crosschq 360 interface. The top navigation bar includes the Crosschq logo, a 360 icon, and a user profile for Nicole Garelick. The left sidebar contains links for Request Management, Candidates, and Reporting. The main content area is titled 'Candidates > Daniel Jones > Crosschq Report'. Below the title, there is a 'How to read this report' link and a row of action buttons: Notes, Share (highlighted with a red box), Download, Access Log, View Raw Data, and Request Add'l References. The report details for Daniel Jones, a Software Developer, are displayed, including his role as a Survey Software Developer - Team Member, his Hiring Manager Tobias Garcia Chiesa, his Requestor Tobias Chiesa, and the Request Date and Completion Date (both 01/17/2022).

Share 360



Crosschq Report for Daniel Jones

Enter names and/or email addresses of people you'd like to share this report with.

Include a note (optional)

Share Report

The second method of sharing is utilizing the download PDF feature. This feature is automatically enabled for your account and allows users to share reports with others by downloading the candidate's report and sharing via pdf.

To download a PDF report, select the candidate in question, click the View Report button, and select download report. There are two types of reports available, a summary report and a full report that includes all of the raw data.

crosschq

360

?

🔔

⚙️

Nicole Garelick

Ontra

Request Management

Candidates

Reporting

Request Management

Last Week

Last Month

Last Year

New Reference Requests

33

Completed Reference Requests

8

Average Reference

4.21 out of 5

Average Self Reference

3.89 out of 5

Avg Time from Request to Completion

43 days

All (1)

Open (0)

Completed (1)

Canceled (0)

Team Member

harris

Create Request

REQUESTED	COMPLETION DATE	CANDIDATE	SURVEY	REQUESTOR / HIRING MANAGE...	STATUS
Jan. 18, 2022	Jan. 19, 2022	Harris, Daniel Software developer	Software Developer - Team Member 4 Requested / 0 In Process / 4 Completed	Tobias Chiesa Tobias Garcia Chiesa	Completed

Harris, Daniel

tobias.chiesa@danielharris-

(612) 777-7777

Averages

Self 3.94 Ref. 4.38

Request Detail

Completion Time: < 1 day

Sent

Accepted

Assigning

Collecting

Completed

Position & Survey

Software developer

Software Developer - Team Member

Hiring Manager

Tobias Garcia Chiesa

tobias.chiesa@crosschq.com

Requestor

Tobias Chiesa

Jan. 18, 2022

View Report

Share

Archive Request

Request Addtl References

References Requested

Reference	Status	Avg
Daniel Harris (Candidate)	Completed	3.94
William Davis (Coworker/Peer)	Completed	4.72
John Rodriguez (Coworker/Peer)	Completed	4.06
Matthew Harris (Manager)	Completed	4.61
Sabrina Taylor (Manager)	Completed	4.11

crosschq

360

?

🔔

⚙️

Nicole Garelick

Ontra

Request Management

Candidates

Reporting

Candidates > Daniel Harris > Crosschq Report

How to read this report

Notes 1

Share

Download

Access Log

View Raw Data

Request Addtl References

Daniel Harris

Software Developer

Survey

Software Developer - Team Member

Hiring Manager

Tobias Garcia Chiesa

Requestor

Tobias Chiesa

Request Date

01/18/2022

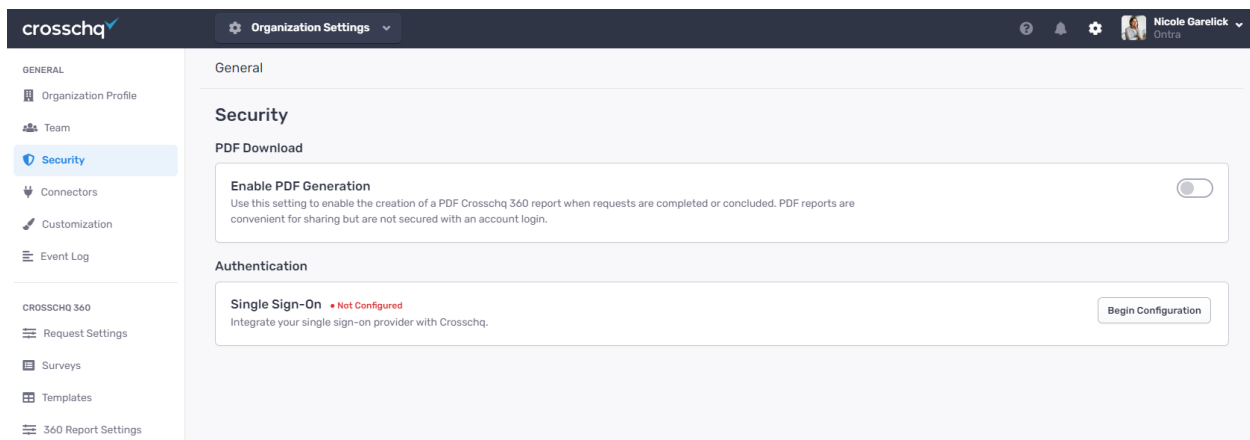
Completion Date

01/19/2022

This way of sharing reports does come with a security risk, as users are unable to track how PDFs are distributed. It is for this reason that we recommend organizations utilize our secure sharing feature.

If your organization does decide to use secure sharing, we recommend turning off the PDF generation feature to reduce security/sharing issues and security risks for your organization. In order to turn off PDF generation, select Security with the Organization Settings, then disable the toggle next to the PDF generation section.

20 | Page



User ID Permissions

Crosschq offers four different types of user permissions within the platform: Super Administrators, Administrators, Team Members, and Viewers.

- Super Administrators: complete access to all settings, reports, and modules.
- Administrators: can invite/manage other users, can grant users access to other modules, can manage account settings, can make requests to candidates, and can view reports that they have permission to view.
- Team Members: can invite Viewer users, can make requests to candidates, can view all non-private reports. Team members can also access all modules they have permission to access such as 360, NHA, and/or Recruit.
- Viewers: can view all reports that are shared with them. Viewers can only view reports that have their name associated with the request, meaning they are a hiring manager or the report has been shared with them.

To review how to invite team members to your organization, refer to this [article](#).

Making Candidates Private

For those organizations that want to ensure certain team members can only see reports they have access to, it is important to utilize the privacy setting on the candidate page.

By marking a candidate private, users make sure that only admins and the owner of the candidate and hiring manager can access the candidate's report. Additionally, when a report is marked as private the secure sharing feature is disabled to make sure the information is shared only with those who have access to the report.

To mark a candidate as private, select the candidate in question. Select the three vertical dots next to the candidate's name, and click Mark Private.

crosschq

360

Request Management

Candidates

Reporting

Candidates > Daniel Harris

Daniel Harris

tobias.chiesa+danielharris@crosschq.com

(612) 777-7777

Self 3.94 Ref. 4.38 ↑

Last Activity: 01/19/2022

Added by: Tobias Chiesa

Added on: 01/18/2022

Hire Status: Pending

Crosschq Report: [Report is available](#)

REFERENCE REQUESTS

Software Developer Completed

Software Developer - Team Member

Jan. 18, 2022 2 months elapsed

References Requested: 4 requested, 0 In Process / 4 Completed

Requestor: Tobias Chiesa, tobias.chiesa+122@crosschq.com

Hiring Manager: Tobias Garcia Chiesa, tobias.chiesa@crosschq.com

Edit Contact Information

Edit Hiring Status

Make Private

Candidate Access List

Call Candidate

Delete Candidate

Overview on what account types can access/view:

	Requestor	Super Admin	Admin/Team Members	Viewers
Private Candidates	Access to theirs*	Access to all	By invitation or if listed on request/requisition	By invitation or if listed on request/requisition
Non-private Candidates	Access to all	Access to all	Access to all	By invitation
Change Candidate Privacy	Non-private candidates or theirs	All candidates	Non-private candidates OR Private shared w/them	None
Revoke Candidate access	Non-private candidates or theirs	All candidates	Non-private candidates OR Private shared w/them	None
Archive (Request)	Non-private candidates or theirs	All candidates	Non-private candidates OR Private shared w/them	None
Share (Report)	Non-private candidates or theirs	All candidates	Non-private candidates OR Private shared w/them	None

22 | Page

Requesting References from a Candidate

Requesting References from a Candidate

How to Request References from a Candidate

- [Creating a request](#)
- [Requesting additional references](#)

There are a few different ways to request references from a candidate within Crosschq. You can do so from the Create Request button on the Reference Management screen, directly from the candidate profile, or via the Candidate Directory. Below we will overview the most common way users request references from the Reference Management screen. Follow these steps to Create a Request from the Request Management screen.

1. In the upper right corner of the Request Management page, click the Create Request button.

Request Management

Last WeekLast MonthLast Year

New Reference Requests252

Completed Reference Requests83

Average Reference3.22 out of 5

Average Self Reference3.35 out of 5

Avg Time from Request to Completion< 1 day

All (4)Open (4)Completed (0)Canceled (0)

Pete Goettner

Search by name, position, survey

Create Request

Requested	Candidate	Survey	Requestor / Hiring Manager	Status
May. 12. 2020 1 day elapsed	 Octavia, Sammy Senior Administrative Assistant	General/Universal - Team Member 4 Requested / 0 In Process / 0 Completed	Pete Goettner Larry Jackson	Accepted
Apr. 14. 2020 29 days elapsed	 Bandaras, Antonio Senior Rf Engineer	Engineer - Team Member 2 Requested / 0 In Process / 1 Completed	Pete Goettner Pete Goettner	Assigning



Bandaras, Antonio
pete+antonio@codefiant.c...
(415) 672-4305

Averages
Self 4.17 Ref. 3.94

Request Detail

29 days elapsed

Sent

Accepted

Assigning

Collecting

Completed

Position & Survey

Senior RF Engineer

Engineer - Team Member

Hiring Manager

Pete Goettner

pete@crosschq.com

Requestor

Pete Goettner

Apr. 14. 2020

Edit

Cancel

Remind

References Requested

Reference	Status	Avg
Prittal Paneer	Completed	3.94
Direct Report	Unassigned	---

2. In the popup window, enter the First name, Last Name, Email address, and Phone number for the candidate. Then click the Continue button.

New Reference Request

Candidate

Setup Request

Notifications

Summary

First name *

First Name

Last name *

Last Name

Email *

inbox@mail.com

Mobile Phone *

 (555) 555 5555

Continue

- Next in the Setup Request screen either select the preset reference template (To understand how to use templates click [here](#).) or enter the position the candidate is applying for. In the Survey drop-down, choose the job function survey that corresponds to the role for which the candidate is applying.

New Reference Request for Jhone Harris



Start With a Template (optional)

Selecting a template will override your current request and notification settings. To edit your account templates [click here](#).

Position (required)

This is the job title the candidate will likely receive if hired.

CEO

Account Manager & CEO

Acting CEO/ Chief Engineer

Acting CEO then DIRECTOR

Survey (required)

Select a survey that best matches the job opportunity.

ferences you'd like to receive from the candidate.

Start by selecting the **survey** to use for this request above.

Back

Continue

4. In the References to Request section, click the - and + buttons to specify how many references you want for this candidate, then utilize the drop-down menu to specify the type of relationship for that reference. Please note you can select any relationship or indicate a specific type of relationship. Via the Add note button, you can add an optional note to indicate an additional specification for that reference. Be sure that the total number of requests is at least 1. Select continue.

New Reference Request for Jhone Harris



Select a template

Position (required)

This is the job title the candidate will likely receive if hired.

Sales

Survey (required)

Select a survey that best matches the job opportunity.

Sales Account Executive - Manager

References to Request

Configure your request by selecting the number and type of references you'd like to receive from the candidate.

A minimum of 1 reference must be selected

- 1 +	Managers	Please add a manager from Acme.	X	🗑
- 1 +	Any Relationship	Add note		🗑
- 2 +	Coworkers/Peers	Add note		🗑

[+ Add Reference](#)

Total references requested: 4

Back

Continue

- On the notifications page, you can enter the name of the candidate's hiring manager, they will receive a notification when the report is complete. You can also customize the email/SMS messages that are sent to the candidate to provide additional information about the Crosschq process. Check to ensure that the notifications checkboxes are set correctly.

Click the Continue button.

New Reference Request for Jason Smith



Candidate

Setup Request

Notifications

Summary

Hiring Manager(s) (optional)

Provide the name and email of the hiring manager(s) responsible for this hire. Hiring managers can automatically be notified via email when this request is completed by the candidate.

[+ Add Hiring Manager](#)

Candidate Notifications

☒ Notify candidate via email

[X Remove note](#)

Hi Jhone,

Please complete this reference as soon as possible.



☒ Notify candidate via SMS

[Add note](#)

(By selecting this checkbox you confirm that you have spoken with the candidate and have their consent to receive SMS messages from Crosschq)

Notifications to Team Members

Email notifications can be sent to team members when this reference request changes its status. Use the table below to select who should receive these emails.

NOTIFICATION

REQUESTOR

HIRING MANAGER(S)



Back

Continue

See below the email message the candidate will receive once the request is sent.
Default message:



Request for References

Dear Manuel,

Crosschq Bueller is requesting your work references. They have partnered with Crosschq to help make the process of collecting your references faster and easier. Use the button below to get started.

[Begin Providing References](#)

POWERED BY **crosschq**✓

You are receiving this email because a company or individual is requesting references from you. If you do not want to receive requests like this going forward, you can [unsubscribe](#) at anytime.

[Privacy Policy](#)

Crosschq * 145 E Prospect Suite 200 * Danville, CA 94526

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Message with a note:



Request for References

Dear Manuel,

Crosschq Bueller is requesting your work references. They have partnered with Crosschq to help make the process of collecting your references faster and easier. Use the button below to get started.

Note from Crosschq Bueller:

This is the customized message

[Begin Providing References](#)

POWERED
BY crosschq✓

You are receiving this email because a company or individual is requesting references from you. If you do not want to receive requests like this going forward, you can [unsubscribe](#) at anytime.

[Privacy Policy](#)

Crosschq * 145 E Prospect Suite 200 * Danville, CA 94526

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6. Review the information, then click Confirm and Send Request. The candidate will receive an email message with information about the reference request process.

New Reference Request for **Jhone Harris**



Candidate

Jhone Harris
tobias.chiesa+JH@crosschq.com
(612) 777-7777

Setup Request

Position Sales	References 1 Manager 1 Any Relationship 2 Coworkers/Peers
Survey Sales Account Executive - Manager	

Auto-conclude Settings

Elapsed time 7 days	References Required 3 Any Relationship
-------------------------------	--

Hiring Manager(s)

--

Notifications

Candidate Notifications

- Notify candidate via email
- Notify candidate via SMS

[Back](#)

[Confirm and Send Request](#)

- The reference request will appear on the Requests page. Click the downward arrow to expand the request detail. Here you can further understand the status of the request, what references are completed or outstanding, and view information about the candidate, hiring manager, position, averages, and contact information. To learn more about what candidate statuses mean click [here](#).

Request Management

Last Week

Last Month

Last Year

New Reference Requests

252

Completed Reference Requests

83

Average Reference

3.22 out of 5

Average Self Reference

3.35 out of 5

Avg Time from Request to Completion

< 1 day

All (4)

Open (4)

Completed (0)

Canceled (0)

Pete Goettner

Search by name, position, survey

Create Request

Requested	Candidate	Survey	Requestor / Hiring Manager	Status
May. 12. 2020 1 day elapsed	Octavia, Sammy Senior Administrative Assistant	General/Universal - Team Member 4 Requested / 0 In Process / 0 Completed	Pete Goettner Larry Jackson	Accepted
Apr. 14. 2020 29 days elapsed	Banderas, Antonio Senior Rf Engineer	Engineer - Team Member 2 Requested / 0 In Process / 1 Completed	Pete Goettner Pete Goettner	Assigning

Banderas, Antonio

pete+antonio@codefiat.c...

(415) 672-4305

Averages

Self 4.17 Ref. 3.94

Request Detail

29 days elapsed

Sent

Accepted

Assigning

Collecting

Completed

Position & Survey

Senior RF Engineer

Engineer - Team Member

Hiring Manager

Pete Goettner

pete@crosschq.com

Requestor

Pete Goettner

Apr. 14. 2020

Edit

Cancel

Remind

References Requested

Reference	Status	Avg
Prittal Paneer	Completed	3.94
Direct Report	Unassigned	--

Requesting Additional References

If a request has been completed and you want to request additional references from the candidate:

- Select the Request Additional References button:

Jackson, Chris

ryan+chrisjackson@cross...

(925) 262-3505

Averages

Self 3.83 Ref. 4.28

Request Detail

Completion Time: 148 days

Sent

Accepted

Assigning

Concluded

Position & Survey

Account executive

Scientist - Team Member

Hiring Manager

Nicole Garelick

nicole+bark@crosschq.com

Requestor

Ryan Collins

Jul. 19. 2021

View Report

Share

Archive Request

Request Addtl References

References Requested

Reference	Status	Avg
Chris Jackson (Candidate)	Completed	3.83
Gina Collins (Coworker/Peer)	Completed	4.28
Erin Drake (Manager)	Canceled	--
Any Relationship	Unassigned	--
Any Relationship	Unassigned	--
Manager	Unassigned	--

2. Then confirm the number and type of references you want to select from the candidate.
Select confirm and send.

Request Additional References



B

I

Dear **Chris**,

We would like to add one or more references to your request. Please complete this as soon as possible. Thank you!

References to Request

Configure your request by selecting the number and type of references you'd like to receive from the candidate.

-

1

+

Any Relationship

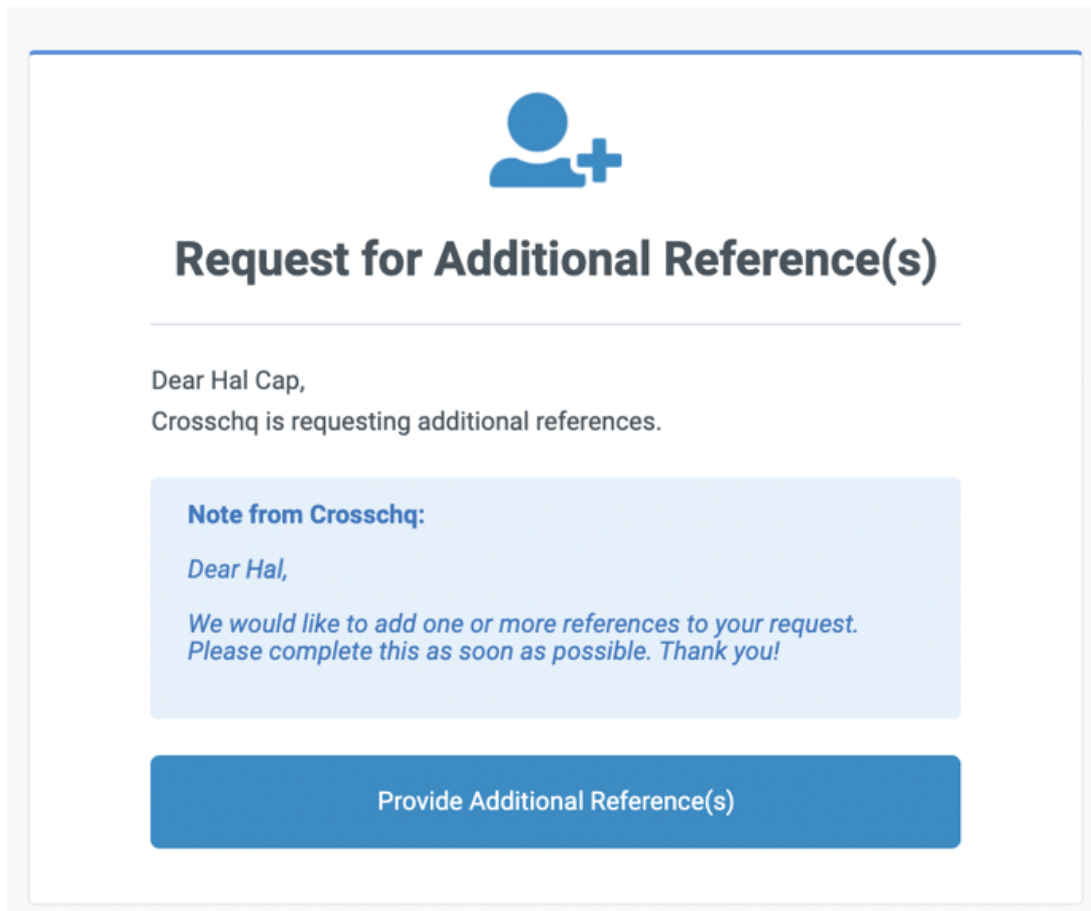
Add note

[+ Add Reference](#)

Total references requested: 1

Confirm and send

3. The candidate will receive an email asking for additional reference(s) and will be prompted to fill out the information within their account. The additional references will then be merged with their Crossschq report and will appear complete within the Crossschq account, no need to re-open the request all will be easily compiled together.



Candidate Did Not Receive Reference Request

If a Candidate Did Not Receive a Request/a Request is in Spam

We sporadically have spam issues with emails we send to Gmail accounts (we rarely see a spam issue with Yahoo, Outlook, or other email providers). Google uses AI for spam detection, and its algorithm constantly changes and is often wrong. This is frustrating, as Crossschq's emails are transactional in nature and are very important to the recipient. We never send spam. We're working on this issue with consultants and email experts to optimize our email server settings and email formats to reduce the Gmail spam issue, and we plan to keep investing in improving our deliverability. In the meantime, please note that we also send SMS notifications to every candidate and reference. Candidates/references will receive these messages 100% of the time, regardless of the spam issue. We recommend directing candidates/references to their SMS messages if they didn't receive the email from Crossschq.

Managing a Reference Request

Manage a Reference Request

How to Manage a Reference Request

1. To manage the request, click **request detail**. Here you can manage, edit, or cancel a request.

☐ Jan. 12, 2022
< 1 day elapsed

 Banderas, Antonio
Real estate

Sales Account Executive - Team Mem...
1 Requested / 0 In Process / 0 Completed

Nicole Garelick

Assigning


Banderas, Antonio
tobias.chiesa+antonio@cr...
+54 9 11 6762 5201
Averages
Self 4.00 Ref. ---

Request Detail

< 1 day elapsed

Sent

Accepted

Assigning

Collecting

Completed

Position & Survey
Real estate
Sales Account Executive
- Team Member

Hiring Manager

Requestor
Nicole Garelick
Jan. 12, 2022

EditCancel

References Requested

[View Completed Responses](#)

Reference	Status	Avg
Antonio Banderas (Candidate)	Completed	4.00
Manager	Unassigned	--

Candidates > Antonio Banderas > Reference Request

Reference requested by Antonio Banderas

Self Reference

Completed

References Requested

Manager (0/1)

Unassigned

Sales Account Executive - Team Member
Assigning

Request Status
50%

Requestor:
Nicole Garelick
Requested on 01/12/2022

Hiring Manager:

Job Position:
Real Estate

Auto-conclude:
1 Any Relationship complete(s) their survey(s) AND > 1 day(s) have elapsed.

Send Reminder

Edit Request

Cancel Request

Conclude Request

2. To edit the request, click the edit button. Here you can edit the request structure.

Edit Reference Request for Antonio Banderas



Position (required)

This is the job title the candidate will likely receive if hired.

Real Estate



Hiring Manager(s) (optional)

Provide the name and email of the hiring manager(s) responsible for this hire. Hiring managers can automatically be notified via email when this request is completed by the candidate.

[+ Add Hiring Manager](#)

References to Request

Configure your request by selecting the number and type of references you'd like to receive from the candidate.

A minimum of 1 reference must be selected

- 1 +

Managers

[Add note](#)

[+ Add Reference](#)

Total references requested: 1

Auto-conclude Reference Requests (optional)



This reference request will be auto-concluded when 1 Any Relationship complete(s) their survey(s) AND > 1 day(s) have elapsed. You can override this auto-conclude rule by [clicking here](#).

Cancel

Save

- Requests are automatically marked as "Past Due" after 72 hours at which point candidates will automatically get reminders to complete the request. Additionally, to send another reminder to the candidate, click the send reminder button.

Candidates > Antonio Banderas > Reference Request

Reference requested by Antonio Banderas

Self Reference Completed ✓

References Requested

Manager (0/1) @

Unassigned

Sales Account Executive - Team Member
Assigning

Request Status 50%

Requestor:
Nicole Garelick
Requested on 01/12/2022

Hiring Manager:

Job Position:
Real Estate

Auto-conclude:
1 Any Relationship complete(s) their survey(s) AND > 1 day(s) have elapsed.

Send Reminder

Edit Request

Cancel Request

Conclude Request

*note: the image shows the "send reminder" button which cannot be clicked within 24 hours because a reminder was sent recently

- To cancel the request, click the cancel button. The following alert will prompt:

Cancel this reference request

Candidate and references won't be able to add more information related to this request. This cannot be undone.

☐ Notify candidate that this request has been cancelled.

No, Go Back

Yes, I'm Sure

Within the candidate or reference details, we will expose an **Email Opened** label if the respective user opened the Crosschq request:

Reference requested Aaron Tarcen

Self Reference

In Progress

Email opened

It is possible that some browsers and mail servers prevent tracking of opened emails, though this will represent only a small fraction of instances.

Bulk Actions from the Request Management Screen

In addition to being able to remind, conclude and archive requests individually, users also have the option to conduct bulk actions.

To conduct a bulk action, select the candidates you would like to conduct an action on by selecting the checkmark. Then select the desired action from the toolbar underneath the search bar. Here you have four options for bulk actions, archive, send a reminder, conclude, and delete. Select the desired action and confirm you want to conduct via the confirmation screen. This will complete the bulk action.

The screenshot displays the 'Request Management' dashboard in the Crosschq system. The top navigation bar includes 'Request Management', 'Candidates', 'Reporting', and 'Prospects'. The dashboard features several summary cards: 'New Reference Requests' (74), 'Completed Reference Requests' (26), 'Average Reference' (4.19 out of 5), 'Average Self Reference' (4.20 out of 5), and 'Avg Time from Request to Completion' (33 days). Below these cards is a toolbar with filters for 'All (478)', 'Open (245)', 'Completed (54)', and 'Cancelled (33)', along with a search bar and a 'Create Request' button. The main table lists 12 selected requests, each with a checkbox, date, status, candidate name, role, and a dropdown menu for actions. The actions include 'Assigning', 'Cancelled', and 'Completed'.

Request ID	Date	Status	Candidate Name	Role	Action
1	Sep. 13, 2021	3 days elapsed	Garcia, Pedro	IT Operations - Manager	Assigning
2	Jul. 22, 2021	54 days elapsed	Chiesa, Tobias	Biostatistician - Manager	Assigning
3	Jul. 22, 2021		Chiesa, Tobias	General/Universal - Team Member	Cancelled
4	Jul. 19, 2021	Jul. 20, 2021	Chiesa, Tobias	General/Universal - Team Member	Completed
5	Jul. 06, 2021	Jul. 06, 2021	Margn, Marsh	Biostatistician - Manager	Completed
6	Jul. 02, 2021	Jul. 02, 2021	Ogg, Ogg	Sales Account Executive - Team Member	Completed
7	Jul. 02, 2021	Jul. 02, 2021	Santiago Morrone, Miguel	In Home Newborn Care Specialist	Completed
8	Jul. 01, 2021	Jul. 01, 2021	Ogg, Ogg	Adult Caregiver - Team Member	Completed
9	Jul. 01, 2021	Jul. 01, 2021	Ogg, Ogg	Intern	Completed
10	Jul. 01, 2021	Jul. 01, 2021	Frank, Sean	IT Security - Team Member	Completed

If a Candidate Did Not Receive a Request/a Request is in Spam — We sporadically have spam issues with emails we send to Gmail accounts (we rarely see a spam issue with Yahoo, Outlook, or other email providers). Google uses AI for spam detection, and its algorithm constantly changes and is often wrong. This is frustrating, as Crosschq's emails are transactional in nature and are very important to the recipient. We never send spam. We're working on this issue with consultants and

email experts to optimize our email server settings and email formats to reduce the Gmail spam issue, and we plan to keep investing in improving our deliverability. In the meantime, please note that we also send SMS notifications to every candidate and reference. Candidates/references will receive these messages 100% of the time, regardless of the spam issue. We recommend directing candidates/references to their SMS messages if they didn't receive the email from Crosschq. If candidates or references no longer want to receive SMS messages from Crosschq, they can reply STOP to the SMS and messages will no longer be sent. This process works for all numbers based in the US, however, if an international number replies STOP to the SMS this will not be processed. This is due to Twilio's (our SMS provider) policy. If you want to stop receiving SMS messages and have an international number, reach out to support@crosschq.com for assistance.

If a Candidate Request is Accidentally Canceled — if a Candidate request is accidentally canceled, Crosschq can't reverse the cancelation. However, the Candidate owner should create a new request for the candidate which will then allow the candidate to assign their old references to the new request without having to re-take the self-reference or have references re-take the reference surveys.

Candidate Communication Events

Within the Request Detail section, you can also review the "Candidate Communication Events" table. This feature provides a comprehensive overview of all communication channels utilized in candidate interactions.

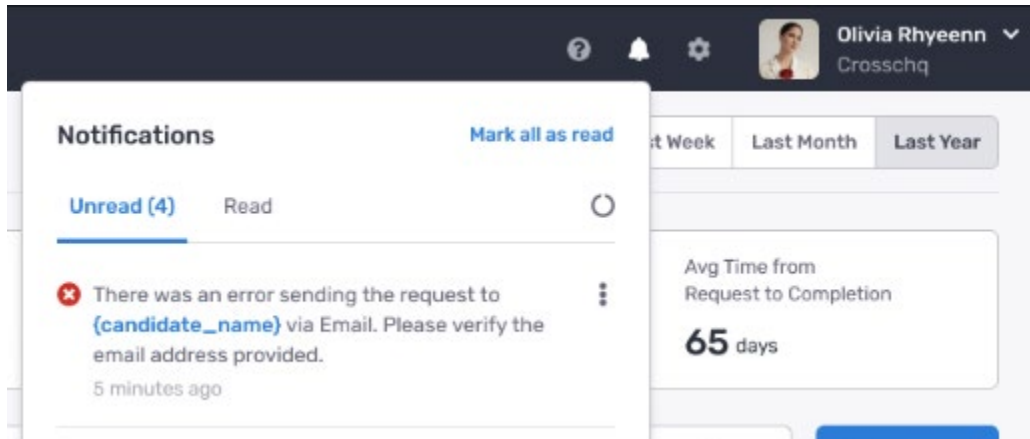
The "Candidate Communication Events" table tracks every email and SMS dispatched to candidates. It captures vital information such as whether the communication was successfully sent, opened, or encountered any failures. Additionally, it logs details regarding the sender and timestamps of each communication event.

Candidate Communication Events

DATE SENT ▲	COMMUNICATION TYPE	ACTION BY
Apr 10, 2024 • 09:23 PM	Email Sent	Juan Hidalgo
Apr 10, 2024 • 09:23 PM	Email Delivered	System
Apr 10, 2024 • 09:23 PM	SMS Sent	Juan Hidalgo
Apr 10, 2024 • 09:23 PM	SMS Delivered	System
Apr 10, 2024 • 10:58 PM	Email Opened	Constanza Quaglia

(1 2 3)

Should an email or SMS encounter an issue during transmission, we've implemented a proactive solution. Recruiters will now receive instant notifications via the notification bell, elucidating the precise reason behind any communication failure.



Edit Candidate Information

How to Edit Candidate Information

1. To edit the candidate's contact information. Navigate to the Request Management screen.

Requests					Last Week	Last Month	Last Year
New Reference Requests	Completed Reference Requests	Average Reference	Average Self Reference	Avg Time from Request to Completion			
252	83	3.22 out of 5	3.35 out of 5	< 1 day			
All (383) Open (221) Completed (128) Canceled (34) Team Member Search by name, position, survey Create Request							
Requested	Candidate	Survey	Requestor / Hiring Manager	Status			
May. 12. 2020	NP Pelosi, Nancy Asd	Brand Marketer - Manager 10 Requested / 0 In Process / 2 Completed	Nicole Garelick	Concluded			
May. 12. 2020 1 day elapsed	NP Octavia, Sammy Senior Administrative Assistant	General/Universal - Team Member 3 Requested / 0 In Process / 0 Completed	Pete Goettner Larry Jackson	Accepted			
May. 12. 2020	NP Pelosi, Nancy Chief Executive Officer (ceo)	Brand Marketer - Manager 5 Requested / 0 In Process / 0 Completed	Nicole Garelick Nicole Garelick	Canceled			
May. 11. 2020 2 days elapsed	NE Eve, Nicole Head Of Everything	Engineer - Manager 5 Requested / 0 In Process / 0 Completed	Nicole Garelick Nicole Garelick	Sent			

2. Select the candidate that you want to edit. Click on their name.

Request Detail 2 days elapsed

References Requested

Reference	Status	Avg
Manager	Unassigned	--
Manager	Unassigned	--
Direct Report	Unassigned	--
Coworker/Peer	Unassigned	--
Mentor	Unassigned	--

3. Select edit candidate information in the far right corner.

Candidates / Nicole Eve

Reference Requests

Request	References Requested	Request Date	Status	Manage
Engineer - Manager 2 days elapsed	5	05/11/2020	Sent	Manage

4. Enter the corrected information and click save. The candidate's information will automatically update.

Edit Candidate Contact Information

First name *
Nicole

Last name *
Eve

Email *
nicoleeve@gmail.com

Mobile Phone *
+1 612 777 7777

Save

Concluding a Crosschq Request

How to conclude a Crosschq Request

- [Manually Conclude request](#)
- [Request Auto-Conclude](#)

Manually Conclude request

When at least one reference has submitted their Crosschq reference survey, and the candidate has completed the self-reference survey, a button will appear allowing the request conclusion. This button will only be available after the requirements above have been met but does allow the company to control the completion time of a request.

To conclude a request, click into the candidate's profile by selecting the **downward arrow** on the request management screen and select the **Conclude** button. The completed report will be generated.

The screenshot displays the Crosschq Request Management interface. At the top, it shows the candidate's name 'McGuire, Elena', her title 'Software', and the request status 'General/Universal - Team Member' with a '13 days elapsed' timer. Below this, a progress bar indicates the stages: Sent, Accepted, Assigning, Collecting, and Completed. The 'Assigning' stage is currently active. To the right of the progress bar, there are buttons for 'Conclude', 'Edit', 'Remind', and 'Cancel'. The 'Conclude' button is highlighted with a red box. On the right side of the interface, there is a table titled 'References Requested' with columns for 'Reference', 'Status', and 'Avg'. The table lists several references, including 'Elena McGuire (Candidate)' with a status of 'Completed' and an average of 4.11, and 'Elen McGuire Ref1 (Manager)' with a status of 'Requested' and an average of --.

Once the request has been concluded, all outstanding references will be added to the Crosschq report along with the following note: *"Request concluded before reference was completed."*

REFERENCE	COMPANY/TITLE	DURATION	CONTACT INFORMATION	NOTES	AVERAGE
Martin Smith Mentor	--	--	(612) 777-7777 tobias.chiesa+msmith...	--	3.61
Martin Glass Mentor	--	--	--- tobias.chiesa+mglass...	Request concluded before reference was completed.	--
Samuel Nim Self	--	--	(612) 777-7777 tobias.chiesa+samlim2...	--	4.61

Outstanding references will remain open for one week to allow references to fill out their surveys after the request is manually concluded.

If, during this one week period, an outstanding reference is completed, Crosschq will update the candidate's report icon within the Request Management portal to request that you regenerate the candidate's reference report:

360

TC Tobias Chiesa

Isaias Company

Request Management

Last Week

Last Month

Last Year

Request Management

Candidates

Reporting

New Reference Requests

23

Completed Reference Requests

12

Average Reference

3.28 out of 5

Average Self Reference

3.29 out of 5

Avg Time from Request to Completion

< 1 day

All (8)

Open (3)

Completed (5)

Canceled (0)

Archived (0)

Team Member

Search by name, email, phone,...

Regenerate Report

REQUESTED	COMPLETION DATE	CANDIDATE	SURVEY	REQUESTOR / HIRING MANAGER	STATUS	ACTIONS
☐	Sep. 13, 2023	Sep. 13, 2023	Johansen, Mar... Software dev	General - Condensed 2 Requested / 0 In Process / 2 Co...	Tobias Chiesa	Concluded

Pending references have completed the survey. Regenerate the report to see their answers

You can regenerate the report by navigating to the candidate's report and clicking **Regenerate Report**.

360

TC Tobias Chiesa

Isaias Company

Request Management

Candidates

Reporting

Candidates > Martin Johansen > Crosschq Report

How to read this report

Notes

Share

Download

Access Log

View Raw Data

Request Add'l References

One or more pending references have completed the survey. Re-generate the report if you wish to see their responses.

Regenerate Report

Martin Johansen

Software Dev

Survey

General - Condensed

Hiring Manager

Requestor

Tobias Chiesa

Request Date

Sep 13, 2023

Completion Date

Sep 13, 2023

Reference Averages

View Crosschq's 1-5 scale

Reference Avg

Self-Reference Avg

Elapsed Time

After one week of manually concluding the request, the following message will be displayed to outstanding references while attempting to access the survey:



Request Concluded

This reference request was concluded by the employer. Your response is no longer needed.

Please [contact support](#) if you have any questions.

Request auto-conclude

[Read this article to learn more about request auto-conclude](#)

Viewing a Completed Crosschq Report

How to View a Completed Report

NOTE: To learn about all of the information in the report, see the extensive help article on [Reading a Crosschq Report](#).

Once a candidate profile is complete, you'll get an email message notifying you that the report is ready for viewing.

Follow these steps to view a completed report:

1. Click on a candidate listing that indicates **Completed** in the **Status** column. Click the downward arrow to expand the request view. Click on the **View Report** button or icon to access the completed report.

Jan. 17, 2022

Jan. 17, 2022



Jones, Dan...
Software dev...

Software Developer - Team...

4 Requested / 0 In Process / ...

Tobias Chiesa
Tobias García Ch...

Completed









Jones, Daniel
tobias.chiesa+danieljones...
(612) 777-7777

Averages
Self 3.94 Ref. 4.44 ↑

Request Detail

Completion Time: < 1 day

✓

✓

✓

✓

✓

SentAcceptedAssigningCollectingCompleted

Position & Survey
Software developer
Software Developer -
Team Member

Hiring Manager
Tobias García Chiesa
tobias.chiesa@cross...
Jan. 17, 2022

Requestor
Tobias Chiesa
Jan. 17, 2022

 View Report

 Share

 Archive Request

 Request Addt'l References

References Requested

Reference	Status	Avg
Daniel Jones (Candidate)	Completed	3.94
John Rodriguez (Coworker/Peer)	Completed	4.61
William Davis (Coworker/Peer)	Completed	4.56
Sabrina Taylor (Manager)	Completed	4.61
Matthew Harris (Manager)	Completed	4.00

2. Scroll down to see all the sections of the report.

If you have enabled the PDF generation feature, click the **Download** button to get a PDF edition of the report—or a PDF of both the report and all of the raw data.

Otherwise, see [HERE](#) how to utilize secure report sharing within Crosschq users.

[Candidates](#) > [Daniel Jones](#) > Crosschq Report

[How to read this report](#)[Notes](#)[Share](#)[Download](#)[Access Log](#)[View Raw Data](#)[Request Add'l References](#)

Daniel Jones
Software Developer

Survey
Software Developer - Team Member

Hiring Manager
Tobias García Chiesa

Requestor
Tobias Chiesa

Request Date
01/17/2022
Completion Date
01/17/2022

Reference Averages

Reference Avg [?]
4.44
(4.05) Ref Avg for all Fox Corporation candidates

Self-Reference Avg [?]
3.94
(4.20) Self-Assessment Avg for all Fox Corporation candidates

Elapsed Time [?]
< 1 day
(3.2 days) Avg completion time for all Fox Corporation candidates

Reference	Company/Title	Contact Information	Notes	Average
John Rodriguez Coworker/Peer	Delta Technology Software Developer	(612) 777-7777 tobias.chiesa+johnrodriguez@crosschq.com	John is one of my best colleagues at Delta Tech. We have worked together on every project since I started working here.	4.61
William Davis Coworker/Peer	Skill Distillery Student	(612) 777-7777 tobias.chiesa+williamdavis@crosschq.com	William and I worked together on a team for our final project.	4.56
Sabrina Taylor Manager	Skill Distillery Lead Instructor	(612) 777-7777 tobias.chiesa+sabrinataylor@crosschq.com	Sabrina was a lead instructor for the Full Stack boot camp I attended.Skill Distillery, and has a good understanding of my performance in the course and skills as a developer.	4.61

- Click the **View Raw Data** to see all of the answers to all of the survey questions. Note: the raw data is live as soon as any information is submitted by references or the candidate.

[Candidates](#) > [Daniel Jones](#) > Crosschq Report

[How to read this report](#)[Notes](#)[Share](#)[Download](#)[Access Log](#)[Crosschq Report](#)[Request Add'l References](#)

Daniel Jones
Software Developer

Survey
Software Developer - Team Member

Hiring Manager
Tobias García Chiesa

Requestor
Tobias Chiesa

Request Date
01/17/2022
Completion Date
01/17/2022

Reference Contact Information
The following table lists contact information for each of the references provided by the Candidate along with their average reference calculation.

Reference	Company/Title	Contact Information	Notes	Average	Select [?]
John Rodriguez Coworker/Peer	Delta Technology Software Developer	(612) 777-7777 tobias.chiesa+johnrodriguez@crosschq.com	John is one of my best colleagues at Delta Tech. We have worked together on every project since I started working here.	4.61	☐
William Davis Coworker/Peer	Skill Distillery Student	(612) 777-7777 tobias.chiesa+williamdavis@crosschq.com	William and I worked together on a team for our final project.	4.56	☐
Sabrina Taylor Manager	Skill Distillery Lead Instructor	(612) 777-7777 tobias.chiesa+sabrinataylor@crosschq.com	Sabrina was a lead instructor for the Full Stack boot camp I attended.Skill Distillery, and has a good understanding of my performance in the course and skills as a developer.	4.61	☐
Matthew Harris Manager	Best Buy Store Manager	(612) 777-7777 tobias.chiesa+matthewharris@crosschq.com	Matthew was the manager of the Best Buy Store I worked at. He has taught me many things.	4.00	☐
Daniel Jones Self	--	(612) 777-7777 tobias.chiesa+danieljones@crosschq.com	--	3.94	☐

Survey Responses

Collapse

Note: If for some reason an alert is enabled that you would like to disable, at any time your administrator can customize report alerts by enabling or disabling from the report alerts section in the organization settings. To enable turn the slider green, to disable turn the slider gray. Then click into the Crosschq report for the candidate in question and refresh.

Secure Report Sharing

How to Securely Share a Report within Crosschq

To share a completed report with someone who does not have a Crosschq account, you can do so by following the steps below.

Click on the **Share** button

Jan. 18, 2022

Jan. 19, 2022



Harris, Daniel
Software developer

Software Developer - Team Member
4 Requested / 0 In Process / 4 Completed

Tobias Chiesa
Tobias García Chiesa

Completed



Harris, Daniel
tobias.chiesa+danielharris...
(612) 777-7777

Averages
Self 3.94 Ref. 4.38 ↑

Request Detail

Completion Time: < 1 day

Sent

Accepted

Assigning

Collecting

Completed

Position & Survey

Hiring Manager

Requestor

Software developer

Tobias García Chiesa

Tobias Chiesa

Software Developer - Team Member

tobias.chiesa@crosschq.com

Jan. 18, 2022

View Report

Share

Archive Request

Request Addtl References

References Requested

Reference	Status	Avg
Daniel Harris (Candidate)	Completed	3.94
William Davis (Coworker/Peer)	Completed	4.72
John Rodriguez (Coworker/Peer)	Completed	4.06
Matthew Harris (Manager)	Completed	4.61
Sabrina Taylor (Manager)	Completed	4.11

Enter the email of the person with whom you would like to share the report and select the **Share** button. If the user shares a report with a person that does not have a Viewer account yet, they are automatically invited to join the team as a Viewer.

Share 360



Crosschq Report for Daniel Harris

Enter names and/or email addresses of people you'd like to share this report with.

nicole@crosschq.com

Invite New Team Member

nicole@crosschq.com

Add a custom note

Share Report

Already shared with

Email	Account Type	Status
tobias.chiesa+122share@crossch...	Viewer	Sent

The person you shared the report with will then receive an email to access the report, they will click the view button, create a password, and then will be able to access the Live and PDF versions of the report.



Nicole Garelick from Snyder is inviting you to view a Crosschq Report

Nicole Garelick is inviting you to view Lucas Di Mattia's completed Crosschq Report.

Click on the button below for secure access.

[View Lucas Di Mattia's Crosschq Report](#)

The report is now available for the user to view by clicking either the Live or PDF versions of the report.

crosschq 360						
Candidate Report Viewer						
Search by name, position						
REQUESTED	COMPLETION DATE	CANDIDATE	SURVEY	REQUESTOR / HIRING MANAGER	REPORTS AVAILABLE	
Jan. 18, 2022	Jan. 19, 2022	Harris, Daniel Software developer	Software Developer - Team Me... 4 Requested / Assigned / 4 Compl...	Tobias Chiesa Tobias Garcia Chiesa		
Jan. 17, 2022	Jan. 17, 2022	Jones, Daniel Software developer	Software Developer - Team Me... 4 Requested / Assigned / 4 Compl...	Tobias Chiesa Tobias Garcia Chiesa		

Archiving/Deleting a Candidate

How to Archive/Delete a Candidate

If you need to archive or delete a candidate for any reason, please take the following steps.

To **archive** a request select the **Archive Request** button.

The screenshot shows a candidate profile for Daniel Harris, a Software Developer. The profile includes a progress bar for the request status (Sent, Accepted, Assigning, Collecting, Completed) and a table of references requested. The 'Archive Request' button is highlighted with a red box.

Reference	Status	Avg
Daniel Harris (Candidate)	Completed	3.94
William Davis (Coworker/Peer)	Completed	4.72
John Rodriguez (Coworker/Peer)	Completed	4.06
Matthew Harris (Manager)	Completed	4.61
Sabrina Taylor (Manager)	Completed	4.11

If you need to search for them later their profile will be available within the Candidate's page.

The screenshot shows the Candidate Directory with a search bar containing 'harris'. The results show a profile for Daniel Harris, a Software Developer, with a 'View Report' button.

Additionally, if you need to unarchive them select the three dots on their profile and select **unarchive request**.

The screenshot shows a candidate profile for Daniel Harris, a Software Developer. The profile includes a progress bar for the request status (Sent, Accepted, Assigning, Collecting, Completed) and a table of references requested. The 'Unarchive Request' option is highlighted in the dropdown menu.

Reference	Status	Avg
Daniel Harris (Candidate)	Completed	3.94
William Davis (Coworker/Peer)	Completed	4.72
John Rodriguez (Coworker/Peer)	Completed	4.06
Matthew Harris (Manager)	Completed	4.61
Sabrina Taylor (Manager)	Completed	4.11

To **delete** a candidate select the three dots on their profile and select **delete candidate**.

Candidates > Daniel Harris



Daniel Harris
 tobias.chiesa+danielharris@crosschq.com
 (612) 777-7777
 Self 3.94 Ref. 4.38 ↑

Last Activity: 01/19/2022
 Added by: Tobias Chiesa
 Added on: 01/18/2022
 Hire Status: Pending
 Crosschq Report: [Report is available](#)

Edit Contact Information
 Edit Hiring Status
 Candidate Access List
 Call Candidate
 Delete Candidate

REFERENCE REQUESTS

Software Developer Completed
 Software Developer - Team Member
 Jan. 18, 2022 3 months elapsed
 References Requested: 4 requested, 0 In Process / 4 Completed
 Requestor: Tobias Chiesa, tobias.chiesa+122@crosschq.com
 Hiring Manager: Tobias García Chiesa, tobias.chiesa@crosschq.com

If the request is not completed yet you first have to cancel or conclude it and then you will be able to delete the candidate's profile.

Candidates > Jennifer Gooding



Jennifer Gooding
 ryan+jenn@crosschq.com
 (925) 262-3505
 Self -- Ref. --

Last Activity: 04/08/2020
 Added by: Ryan Collins
 Added on: 04/08/2020
 Hire Status: Pending

Edit Contact Information
 Candidate cannot be deleted when there is an active request for references. To delete this candidate, conclude or cancel all requests.
 Delete Candidate

REFERENCE REQUESTS

Sr. Product Engineer Assigning
 Software Developer - Manager
 Apr. 08, 2020 2 years elapsed
 References Requested: 6 requested, 0 In Process / 0 Completed
 Requestor: Ryan Collins, ryan+snyder@crosschq.com
 Hiring Manager: Ryan Drake, ryan+drake@crosschq.com

You can cancel a request by selecting the **Cancel** button.

☐ Apr. 08, 2020 729 days elapsed


 Gooding, Jennifer
 Sr. product engineer

Software Developer - Manager
 6 Requested / 0 In Process / 0 Completed

Ryan Collins
 Ryan Drake

Assigning


Gooding, Jennifer
 ryan+jenn@crosschq.com
 (925) 262-3505
 Averages
 Self -- Ref. --

Request Detail 729 days elapsed

Sent Accepted Assigning Collecting Completed

Position & Survey
 Sr. product engineer
 Software Developer - Manager

Hiring Manager
 Ryan Drake
 ryan+drake@crosschq.com

Requestor
 Ryan Collins
 Apr. 08, 2020

Edit Remind **Cancel**

References Requested

Reference	Status	Avg
Jennifer Gooding (Candidate)	Requested	--
Manager	Unassigned	--
Manager	Unassigned	--
Direct Report	Unassigned	--
Coworker/Peer	Unassigned	--
Coworker/Peer	Unassigned	--
Coworker/Peer	Unassigned	--

Reading a Crosschq Report and Updating Hiring Status

Reading a Crosschq Report

How to read a Crosschq report

To [access a report for a candidate](#), follow these steps:

1. In the menu on the left, click "Request management", and then click the name of the candidate. This will take you to the candidate's profile.
2. Click "Report is available", as shown in the figure below.

[Candidates](#) > Daniel Harris



Daniel Harris
tobias.chiesa+danielharris@crosschq.com
(612) 777-7777
Self 3.94 Ref. 4.38 ↑

Last Activity:
01/19/2022

Added by:
Tobias Chiesa

Added on:
01/18/2022

Hire Status:
Pending ▼

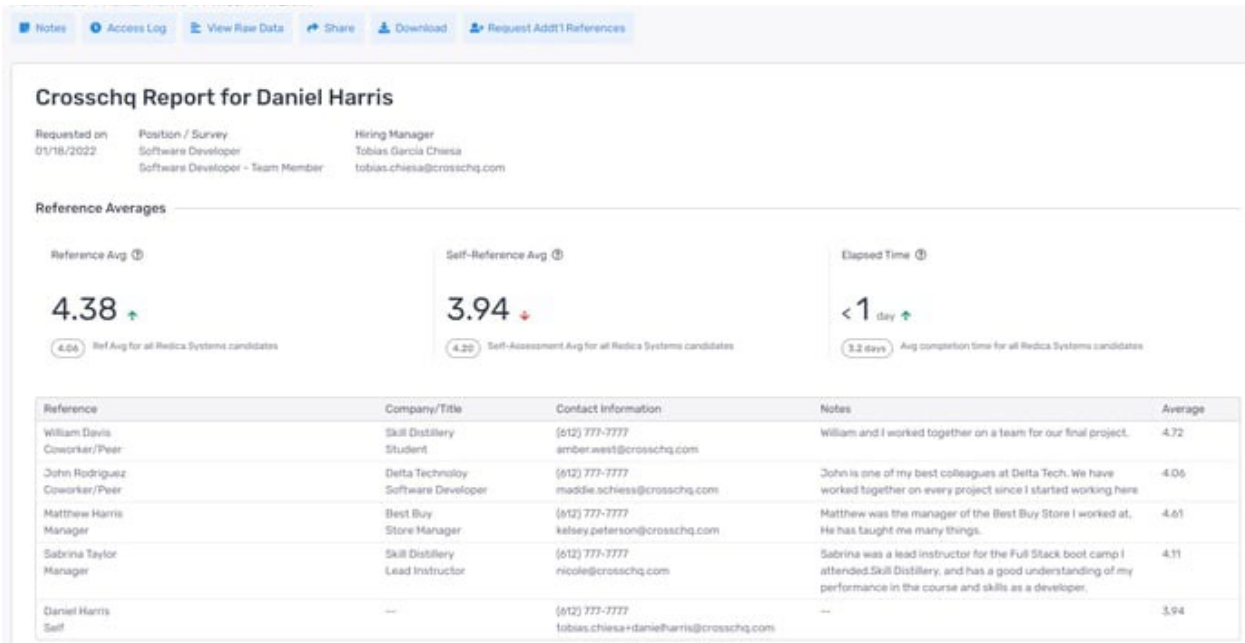
Crosschq Report:
[Report is available](#)

The contents of a Crosschq report

A Crosschq report contains:

- A summary of the scoring averages, a list of survey respondents, and answers to the keystone questions.
- Next, the report presents a set of ranked key attributes, strengths, weaknesses, and answers to the short answer questions.
- Lastly, you'll find all of the individual responses to all of the surveys—from the candidate and each of the references. This raw data is especially helpful when you want to dig a little deeper.

As you can see in the figure below, the report exhibits a format that is easy to review and navigate.



Read the sections below to learn more about the contents of a Crosschq report:

- [Candidate performance rating scale](#)
- [Reference averages](#)
- [Individual References](#)
- [Alerts](#)
- [Candidate Attributes](#)
- [Key Strengths and Areas for Improvement](#)
- [Job function assessment summary](#)
- [Other report sections](#)
- [The raw data report](#)
- [Report Notes](#)
- [Access Log](#)

Candidate performance rating scale

All candidates and references answer a series of scaling questions about overall performance — comparing the performance of the candidate to their coworkers and colleagues. Each question presents a range of values that correspond to the numbers 1 - 5. The survey also asks the references and the candidates to choose a number for the performance on each of the key attributes, and also for overall performance. This numerical scoring scheme provides a quantitative

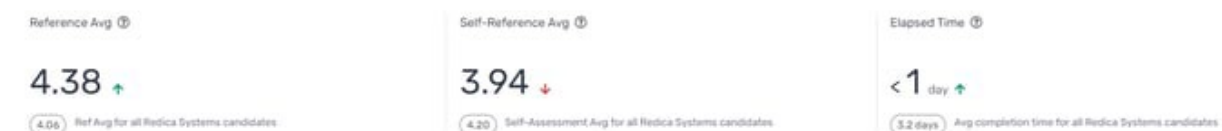
assessment in the form of a convenient, concise set of candidate performance indicators in specific areas.

Reference averages

These are the three metrics at the top of the report:

- **Reference Average** — the reference average is calculated from the first two keystone questions. The first keystone is a single 1-5 rating. The second keystone question are the nine attributes 1-5 ratings. We average these nine ratings into a single number and then calculate the average of keystones 1 and 2.
- **Self-Reference Average** — the self-reference average is calculated from the first two keystone questions. The first keystone is a single 1-5 rating. The second keystone question are the nine attributes 1-5 ratings. We average these nine ratings into a single number and then calculate the average of keystones 1 and 2.
- **Completion time** — given in minutes or hours, this is the time that has elapsed from the point of the initial request until the time at which the last reference completes their survey. Lower completion times may suggest more engagement and interest from the candidate.

Reference Averages



We can see that the scores from the references for this candidate average out to 4.38 and the candidate's self-reference score is 3.94.

Individual References

Look closely at each of the individual reference scores, especially any that are significantly lower than the others.

Reference Averages

Reference	Company/Title	Contact Information	Notes	Average
William Davis Coworker/Peer	Skill Distillery Student	(612) 777-7777 amber.west@crosschq.com	William and I worked together on a team for our final project.	4.72
John Rodriguez Coworker/Peer	Delta Technology Software Developer	(612) 777-7777 maddie.schiess@crosschq.com	John is one of my best colleagues at Delta Tech. We have worked together on every project since I started working here.	4.06
Matthew Harris Manager	Best Buy Store Manager	(612) 777-7777 kelsey.peterson@crosschq.com	Matthew was the manager of the Best Buy Store I worked at. He has taught me many things.	4.61
Sabrina Taylor Manager	Skill Distillery Lead Instructor	(612) 777-7777 nicole@crosschq.com	Sabrina was a lead instructor for the Full Stack boot camp I attended. Skill Distillery, and has a good understanding of my performance in the course and skills as a developer.	4.11
Daniel Harris Self	---	(612) 777-7777 tobias.chiesa+danielharris@crosschq.com	---	3.94

Alerts

Report alerts identify potential concerns that came through during the reference evaluation process. These alerts appear immediately below the reference name list, near the top of the report, because the alerts may contain very important information.

At any time, you can [adjust your notification settings](#) within the Organization settings of your Crosschq account to enable or disable specific notifications, and adjust your low-average threshold number. Crosschq provides these alerts to give you the opportunity to look more closely at the candidate.

Below are the alerts that may appear on a candidate's report:

Reference Average Threshold Alert

The candidate's Crosschq 360 Report will display an alert if the calculated Reference Average from one or more of a Candidate's references falls below this threshold.

Termination Alert

The candidate's Crosschq 360 Report will display an alert if one or more references indicate that a Candidate's employment was terminated.

Code of Ethics Alert

The candidate's Crosschq 360 Report will display an alert if one or more references do not select Strongly Agree when asked if the Candidate has a strong code of ethics.

Declined Request Alert

The candidate's Crosschq 360 Report will display an alert if one or more people declined the Candidate's request for a reference.

Rehire/Recruiting Alert

The candidate's Crosschq 360 Report will display an alert if one or more references state that they would not recommend the candidate if their company were recruiting.

Fraud Alert/Fraud Warning

The candidate's Crosschq 360 Report will display a warning if the candidate and/or any reference either uses the same IP address OR an alert if they are using the same PC or mobile device to complete a survey.

There are many valid reasons for the candidate/reference to share the same IP address (for example, if they are working in the same office) which is why we call it a warning. However, same PC or mobile device alerts are usually more concerning which is why we refer to it as an alert. If the hiring manager has concerns, we highly recommend they reach out to the reference in question to verify authenticity.

For these reasons, **same IP warnings are yellow** as they are less concerning and **same device alerts are red** as they are more concerning. Below is an example of what the same device alert would look like:

 Two or more surveys were completed by users that very likely used the same PC or mobile device. Details						
This alert was triggered because we detected (at a 99.5% confidence level) that two or more surveys were completed using the same PC or mobile device. This is often an indication that a candidate providing a fraudulent reference. The table below provides details on which who used the same device(s), the device type (if available), the date/time the survey was taken, and how long it took to complete each survey.						
Reference	Company	Relationship	Device Used	IP Address	Survey Date	Survey Duration
Jason Randall	Apple	Candidate	Mac OS X 10.15.7	73.247.4.158	07/15/2021, 05:34pm	4 minutes 5 seconds
Henry Dickson	Google	Manager	Mac OS X 10.15.7	73.247.4.158	07/15/2021, 06:14pm	6 minutes 41 seconds
Alana Sabin	Apple	Manager	Mac OS X 10.15.7	73.247.4.158	07/15/2021, 06:27pm	9 minutes 34 seconds
Maddie Henderson	Apple	Direct Report	Mac OS X 10.15.7	73.247.4.158	07/15/2021, 06:22pm	2 minutes 58 seconds
Show More						

Above you can see the device used, IP address, survey date, and duration. The items that are highlighted in red indicate information that is concerning such as the same device used, same IP used, consecutive dates completed, and short survey duration.

Additionally, Crossschq often receives emails and SMS messages directly from candidates and references. If Crossschq receives a message containing information that indicates the reference's relationship to the candidate is different from the requested reference, Crossschq will share this information with the customer so they can confirm the relationship.

Potential Workplace Safety Issues Alert

The candidate's Crossschq 360 Report will display an alert if one or more references indicate that the Candidate has previously engaged in activities that could affect workplace safety.

Recommendations

Below the alerts, you'll find a table that lists candidate responses to the question "If your company was recruiting, would you recommend [this candidate]?"

Candidate Attributes

Here, the key attributes of the candidate are ranked from highest to lowest, together with the self-reference scores. Click the link above the table to view specific survey responses.

Key Strengths and Areas for Improvement

This section lists both the most frequently selected strengths and areas for improvement. Click the link above the table to view specific survey responses.

Job function assessment summary

Here, you'll find a comparison of the candidate self-scoring with reference scoring on various attributes of the role for which the candidate is applying. This helps in evaluating the fit of the candidate for this role.

Other report sections

Near the bottom of the report, you'll find more details such as comments on candidate strengths and areas for improvement, personal feedback from references, and ratings that indicate how the candidate compares with coworkers and colleagues.

The raw data report

To look more closely at reference feedback or isolate specific data sets, have a look at the raw data report. The raw data includes the answer to every question from the references and the candidate.

Click the **View Raw Data** button to toggle the page to the Reference Raw Data Report.

Scroll down to view contact information and answers to each of the questions. Back at the top of the page, click the **Crosschq Report** button to toggle back to the main report.

Report Notes

To leave a note about a Candidate's report, you can do so easily by utilizing the Notes feature within Crosschq.

Select the Notes button.

Candidates > Daniel Harris > Crosschq Report

[How to read this report](#) **Notes 1** [Share](#) [Download](#) [Access Log](#) [View Raw Data](#) [Request Add'l References](#)

Daniel Harris

Software Developer

Survey
Software Developer - Team Member

Hiring Manager
Tobias Garcia Chiesa

Requestor
Tobias Chiesa

Request Date
01/18/2022
Completion Date
01/19/2022

Reference Averages

View Crosschq's 1-5 scale

Reference Avg
4.38 4.07
This Reference Avg is higher than most FINN partners candidates.

Self-Reference Avg
3.94 4.17
This Self-Reference Avg is lower than most FINN partners candidates.

Elapsed Time
<1 day 3.8 days
This elapsed time is lower than most FINN partners candidates.

REFERENCE	COMPANY/TITLE	DURATION	CONTACT INFORMATION	NOTES	AVERAGE/TIME
William Davis Coworker/Peer	Skill Distillery Student	From 2016-2020 4 years	(612) 777-7777 amber.west@crosschq.c...	William and I worked together on a team for our final project.	4.7 < 1 day
John Rodriguez	Delta Technology	Current	(612) 777-7777	John is one of my best colleagues at Delta Tech. We	4.1

Add in the desired note and select submit. If the **send notification** box is checked, the requestor and the hiring managers will receive an email notification.

360

Candidates > Daniel Harris > Crosschq Report

How to read this report

Notes 1

Share

Download

Ac

Daniel Harris

Software Developer

Survey

Software Developer - Team Member

Hiring Manager

Tobias Garcia Chiesa

Requestor

Tobias Chiesa

Reference Averages

Reference Avg

4.38

4.07

This Reference Avg is higher than most FINN partners candidates.

Self-Reference Avg

3.94

4.17

This Self-Reference Avg is lower than most FINN partners candidates.

Elaps

<1d

This e

REFERENCE	COMPANY/TITLE	DURATION	CONTACT INFORMATION	NOTES
William Davis Coworker/Peer	Skill Distillery Student	From 2016-2020 4 years	(612) 777-7777 amber.west@crosschq.c...	William and I wor project.

360 Notes

KP

Kelsey Peterson

03/18/2022

Particularly interested in his manager input here - flagging for team.

Add a note

@nicole take a look at Martin's reference from Mike Fitz. Interesting feedback especially around his strengths

Send notification

Submit

Your note will be saved for others to see and comment on.

360

Candidates > Daniel Harris > Crosschq Report

How to read this report

Notes 2

Share

Download

Ac

Daniel Harris

Software Developer

Survey

Software Developer - Team Member

Hiring Manager

Tobias Garcia Chiesa

Requestor

Tobias Chiesa

Reference Averages

Reference Avg

4.38

4.07

This Reference Avg is higher than most FINN partners candidates.

Self-Reference Avg

3.94

4.17

This Self-Reference Avg is lower than most FINN partners candidates.

Elaps

<1d

This e

REFERENCE	COMPANY/TITLE	DURATION	CONTACT INFORMATION	NOTES
William Davis Coworker/Peer	Skill Distillery Student	From 2016-2020 4 years	(612) 777-7777 amber.west@crosschq.c...	William and I wor project.

360 Notes

TC

You

Today at 2:22 PM

@nicole take a look at Martin's reference from Mike Fitz. Interesting feedback especially around his strengths

KP

Kelsey Peterson

03/18/2022

Particularly interested in his manager input here - flagging for team.

Add a note

Add your comment here

Send notification

Submit

57 | Page

Access Log

Additionally, you can see if others have accessed the report by viewing the access log. Select the Access Log button to review.

Candidates > Daniel Harris > Crosschq Report

[How to read this report](#)[Notes 2](#)[Share](#)[Download](#)[Access Log](#)[View Raw Data](#)[Request Add'l References](#)

Daniel Harris
Software Developer

Survey
Software Developer - Team Member

Hiring Manager
Tobias Garcia Chiesa

Requestor
Tobias Chiesa

Request Date
01/18/2022
Completion Date
01/19/2022

Reference Averages
View Crosschq's 1-5 scale

Reference Avg
4.38
This Reference Avg is higher than most FINN partners candidates.

Self-Reference Avg
3.94
This Self-Reference Avg is lower than most FINN partners candidates.

Elapsed Time
<1 day
This elapsed time is lower than most FINN partners candidates.

REFERENCE	COMPANY/TITLE	DURATION	CONTACT INFORMATION	NOTES	AVERAGE/TIME
William Davis Coworker/Peer	Skill Distillery Student	From 2016-2020 4 years	(612) 777-7777 amber.west@crosschq.co...	William and I worked together on a team for our final project.	4.7 < 1 day
John Rodriguez	Delta Technology	Current	(612) 777-7777	John is one of my best colleagues at Delta Tech. He	4.4

Report Access Log

Tobias Chiesa	11 Apr 2022, 2:17 PM	Live Report
Suzanne Aiello	10 Apr 2022, 9:58 PM	PDF
Suzanne Aiello	10 Apr 2022, 9:53 PM	Live Report
Madeline Schiess	8 Apr 2022, 1:19 PM	Live Report
Nicole G	8 Apr 2022, 10:55 AM	PDF
Nicole G	8 Apr 2022, 10:54 AM	Live Report
Nicole G	8 Apr 2022, 10:53 AM	Live Report
Nicole G	8 Apr 2022, 10:53 AM	PDF
Suzanne Aiello	7 Apr 2022, 4:57 PM	Live Report
Amber West	7 Apr 2022, 4:57 PM	Live Report
Suzanne Aiello	7 Apr 2022, 4:57 PM	Live Report
Ari Goodstein	7 Apr 2022, 3:25 PM	Live Report
Peter Sitov	7 Apr 2022, 2:18 PM	Live Report
Tobias 122share	7 Apr 2022, 1:36 PM	Live Report
Tobias 122share	7 Apr 2022, 1:35 PM	Live Report

Updating Hiring Status

How to Update the Hiring Status for a Candidate

Updating the Hiring Status of a Candidate

Once a [candidate has been completed within Crosschq](#), users can update the hiring status by taking the following steps.

1. Click on the candidate profile.

The screenshot shows the candidate profile for Antonio Banderas. At the top, there is a header with the candidate's name, profile picture, and contact information: tobias.chiesa+antonio@crosschq.com, +54 9 11 6762 5201, and Self 4.00 Ref. 5.00. Below this, there are fields for Last Activity (01/12/2022), Added by (Nicole Garelick), Added on (01/12/2022), Hire Status (Pending), and Crosschq Report (Report is available). The main section is titled 'REFERENCE REQUESTS' and contains a table with the following data:

Real Estate	Completed	Sales Account Executive - Team Member	References Requested	Requestor	Hiring Manager
Jan. 12, 2022	an hour elapsed	1 requested 0 In Process / 1 Completed	Nicole Garelick nicole+122@crosschq.com	---	

2. Select the drop-down menu on the far right-hand side next to the "Pending" status. Then select the correct option based on the candidate's hiring status.

This screenshot shows the same candidate profile as the previous one, but with the 'Hire Status' dropdown menu open. The menu options are 'Candidate was hired', 'Candidate was not hired', and 'Reset'. The 'Hire Status' field currently displays 'Pending'.

A close-up of the 'Hire Status' dropdown menu. The menu is open, showing three options: 'Candidate was hired', 'Candidate was not hired', and 'Reset'. The 'Hire Status' label and the current value 'Pending' are visible above the menu.

3. If the candidate was hired, the status will look like this in the candidate's profile:

[Candidates](#) > Antonio Banderas



Antonio Banderas

tobias.chiesa+antonio@crosschq.com

+54 9 11 6762 5201

Self 4.00 Ref. 5.00 ↑

Last Activity:

01/12/2022

Added by:

Nicole Garelick

Added on:

01/12/2022

Hire Status:

 Hired ▾

Crosschq Report:

[Report is available](#)

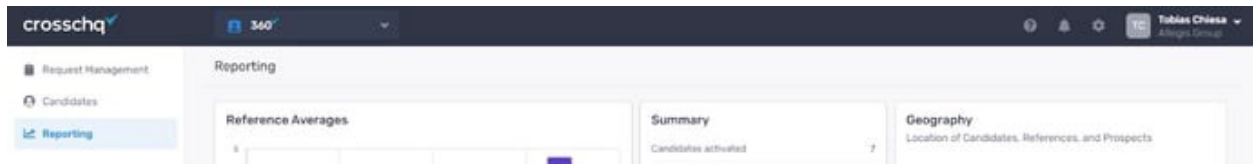
Reporting Screen

Reporting

How to Utilize Crosschq's Reporting Feature

The reporting screen allows users to view and interact with a range of graphs, including candidate averages, completion times, prospect opt-in rates, and more for deeper understand of Crosschq's data.

To access the reporting screen, click the Reporting tab within your Crosschq homepage.



Below, we explain the information in each graph and how to adjust the settings/information.

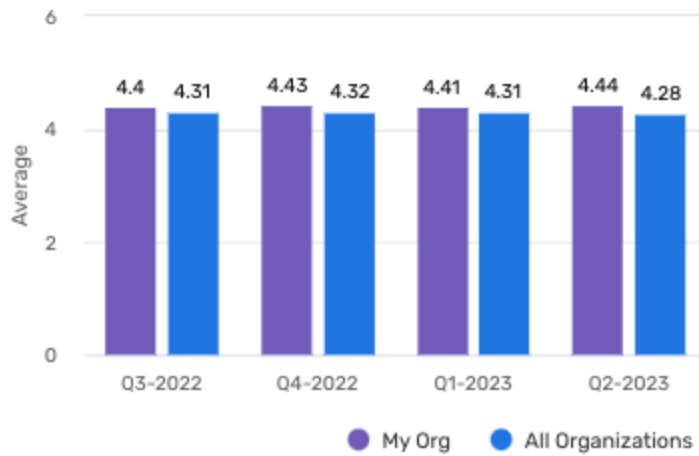
Reference Averages

The reference average graph displays the average reference data for your organization within a given time period and offers a comparison to other Crosschq organizations.

Additionally, you can sort the data by date range, survey type, and team member. The graph is dynamic so it will automatically update based on your selections from the drop-down menus.

If you would like to see only your organization's information, click My Org (the circle beside this label should turn purple). The same action can be repeated to see other organizations' data (in blue).

Reference Averages



Request KPIs

The Request KPIs snapshot provides users with an overview of total request activity within a specific time period. By clicking the calendar icon at the bottom of the page, users can adjust the time frame and the data will automatically update.

Request KPIs

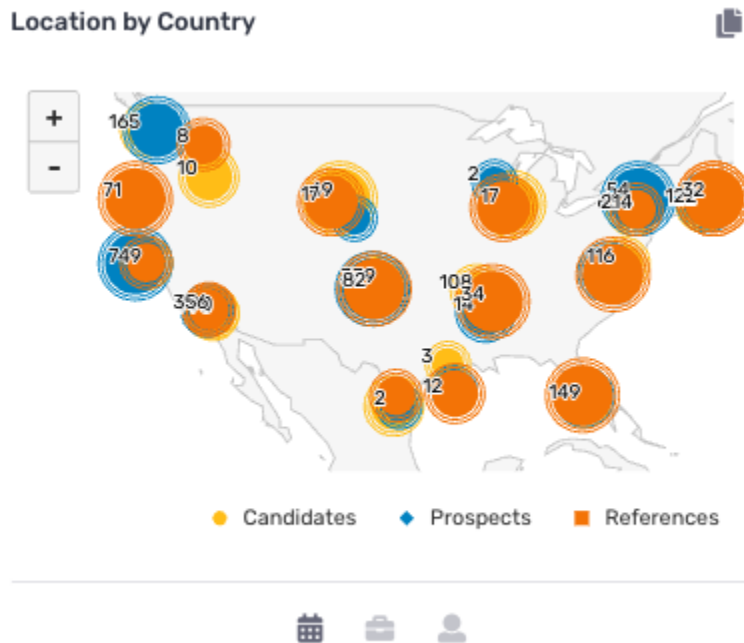


Requests sent (in period)	1464
Open	315
Completed	987
Canceled	153
Declined	9
Declined references	11
# of fraud alerts	59



Location by Country

This graph shows users where candidates, references, and prospects are based geographically. This information can be further sorted by adjusting the time frame, survey type, and team member via the filter icons.

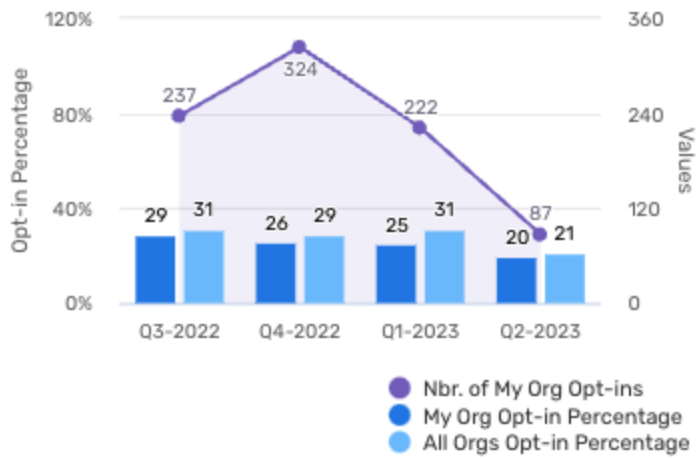


Prospect-Opt-in Rates

Within the Prospect Opt-in Rate graph, users can see opt-in information within a given time period and as compared to other organizations. To sort the data further, click on the specific percentages to view one organization at a time and use the drop-down menus to further filter by time and survey type.

To solely view your organization's information, click My Org Opt-In Percentage. The same action can be repeated to see other organizations' opt-in data.

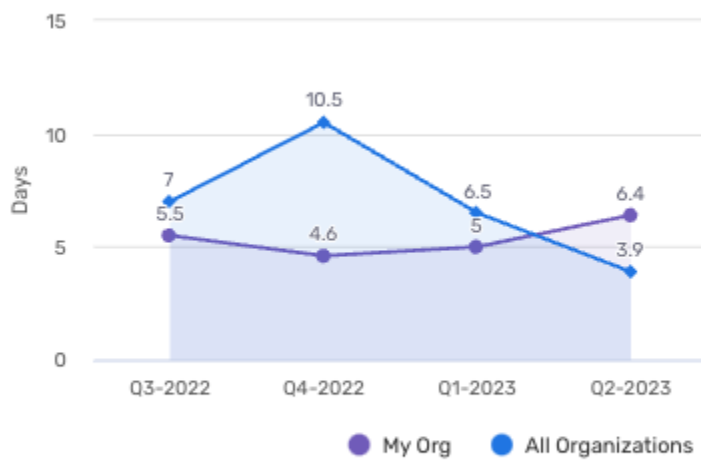
Prospect Opt-in Rate



Average Completion Times

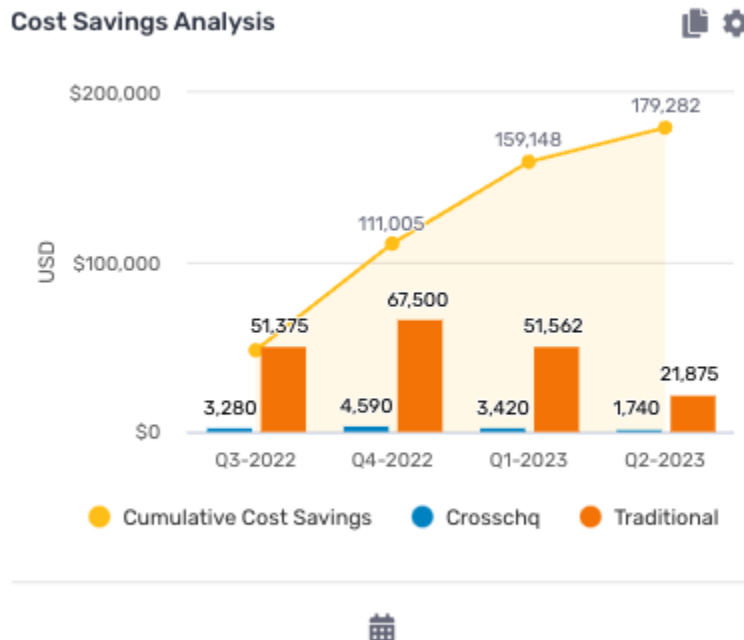
The Average Completion time graph allows users to get a sense of the average completion time for a Crosschq request as compared to other organizations. Users can filter via the icons at the bottom of the graph, or by clicking the legend to isolate the data sets.

Average Completion Time



Cost Savings Analysis

The cost savings analysis graph is designed to illustrate the cost of a Crosschq request versus the cost of a traditional reference check. To customize the settings, click on the settings wheel in the far right corner.



From there, enter the information in the form below to customize the analysis to your organization. Then you will be able to further sort by time period via the calendar icon at the bottom of the graph.

Cost Savings and Efficiency Settings



Crosschq uses the following formula to calculate the cost of collecting traditional references (all times are converted to hours):
of References Collected per Candidate x # of Candidates in the Period x ((Scheduling Time + Phone Interview Time + Documenting Results Time) x Employee Hourly Cost)

The following formula is used to calculate the cost of collecting references via Crosschq (all times are converted to hourly):
of Candidates in the Period x (Create Request Time + Manage Request Time) x Employee Hourly Cost

Traditional referencing inputs:

Scheduling (min)

Phone interview (min)

Documenting results

Crosschq referencing inputs:

Create request (min)

Manage request (min)

Employee cost:

Cost per hour \$

Value of generating job prospects:

Cost of sourcing a new hire \$

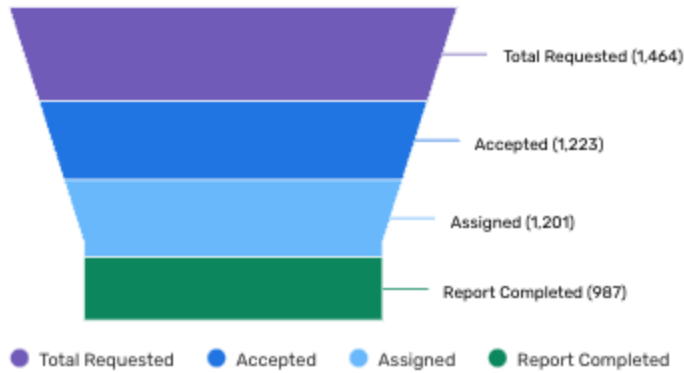
Conversion of prospects to hires %

Apply

Reference Requests

The Reference Request graph displays information as it relates to all reference requests in your organization and their various statuses. Here you can see the total number of requests requested, this is further segmented by request status so you can get a better sense of your internal progress. Finally, you can further sort the data via the icons at the bottom of the screen.

Reference Requests



Report KPIs

The Report KPIs snapshot provides users with an overview of completed reference report metrics within a specific time period. By clicking the calendar icon at the bottom of the page, users can adjust the time frame and the data will automatically update.

Report KPIs

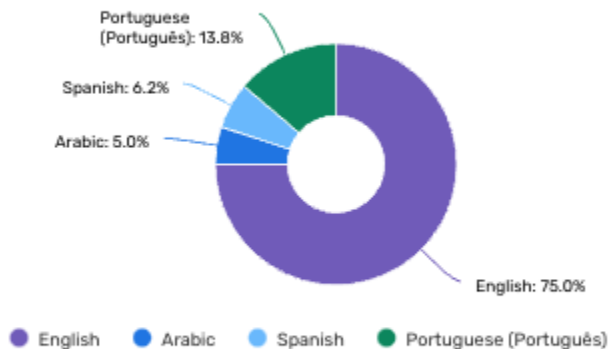
Self avg rating	4.1
Avg # of refs per candidate	3.6
Avg time to complete	5.3 days
Avg views per report	1.3
Avg notes per report	0
Avg PDF downloads per report	0
# of fraud alerts	59

Language Usage

This chart tracks the number of surveys that have been filled out by language. Click the legend labels to select and/or deselect which languages to include in the chart. Survey time frame

can be updated by clicking the calendar icon at the bottom.

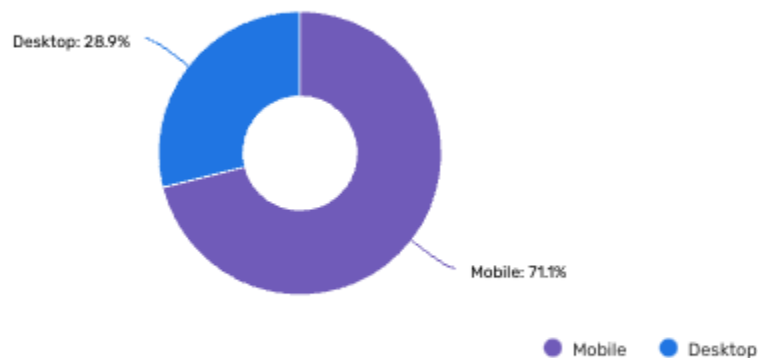
Language Usage



Device Usage

This chart tracks the percentage of surveys completed via desktop versus mobile device. Click the legend labels to select and/or deselect which device to include in the chart. Survey time frame can be updated by clicking the calendar icon at the bottom.

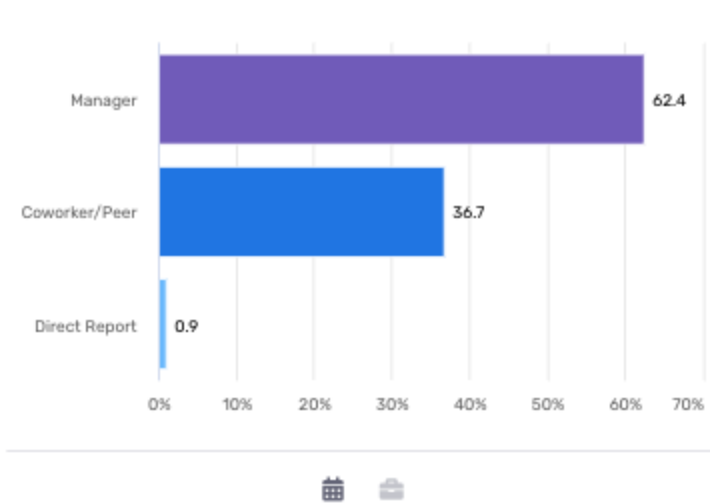
Device Usage



Reference Relationship to Candidate

This chart tracks the percentage of surveys created broken down by candidate relationship. Use the filter icons at the bottom to update the chart to a specific date range or survey.

Reference's Relationship to Candidate



Fraud Alerts

This chart allows organizations to keep track of their fraud alerts over time and compare them with the percentage of alerts across all Crosschq customers. Please note this chart only keeps track of same device alerts and doesn't include "Fraud Warnings" also known as same ip address alerts.



Hired Prospects (Estimated)

This chart tracks the candidates who opted in as a prospect and Crosschq has inferred have been hired by the organization. Users can choose what columns to appear in the chart by clicking the vertical ellipsis at the top right corner and selecting Customize Report. The ellipsis also provides an option to download the report as a CSV file. The calendar icon at the bottom allows users to filter by a specific date range.

Hired Prospects - Estimated 

OPT-IN DATE	DATE OF HIRE	PROSPECT NAME	SOURCE CANDIDATE	JOB POSITION	REQUESTOR	HIRING MANAGER	PROFILE	REPORT
Jan 01, 2023	Jun 12, 2023	Mark Johnson	Daniel Harris	Software Developer	Nicole Garelick	--	Link	Report
Jan 01, 2023	Jun 12, 2023	John Williams	Daniel Harris	Store Manager	Nicole Garelick	--	Link	Report
Jan 01, 2023	Jun 12, 2023	John Smit	Kelsey Peterson	Sales Manager	Nicole Garelick	--	Link	Report
Jan 01, 2023	Jun 12, 2023	Robert Smit	Kerry Candidate	AM	Nicole Garelick	--	Link	Report



360 Request Report

This chart tracks all reference requests that were created. Users can choose what columns to appear in the chart by clicking the vertical ellipsis at the top right corner and selecting Customize Report. The ellipsis also provides an option to download the report as a CSV file. The icons at the bottom allow users to filter by date range, job position, survey, requestor, and request status.

360 Request Report 

REQUESTED DATE	COMPLETION DATE	CANDIDATE	HIRING MANAGER	SELF AVG	REFS AVG	REPORT LINK
Mar 21, 2023	--	Todd Smith	--	0	0	Report
May 03, 2023	May 03, 2023	Ted Flanders	--	0	4.67	Report
May 25, 2023	May 25, 2023	Hannah Kim	Tobias Test	0	7	Report

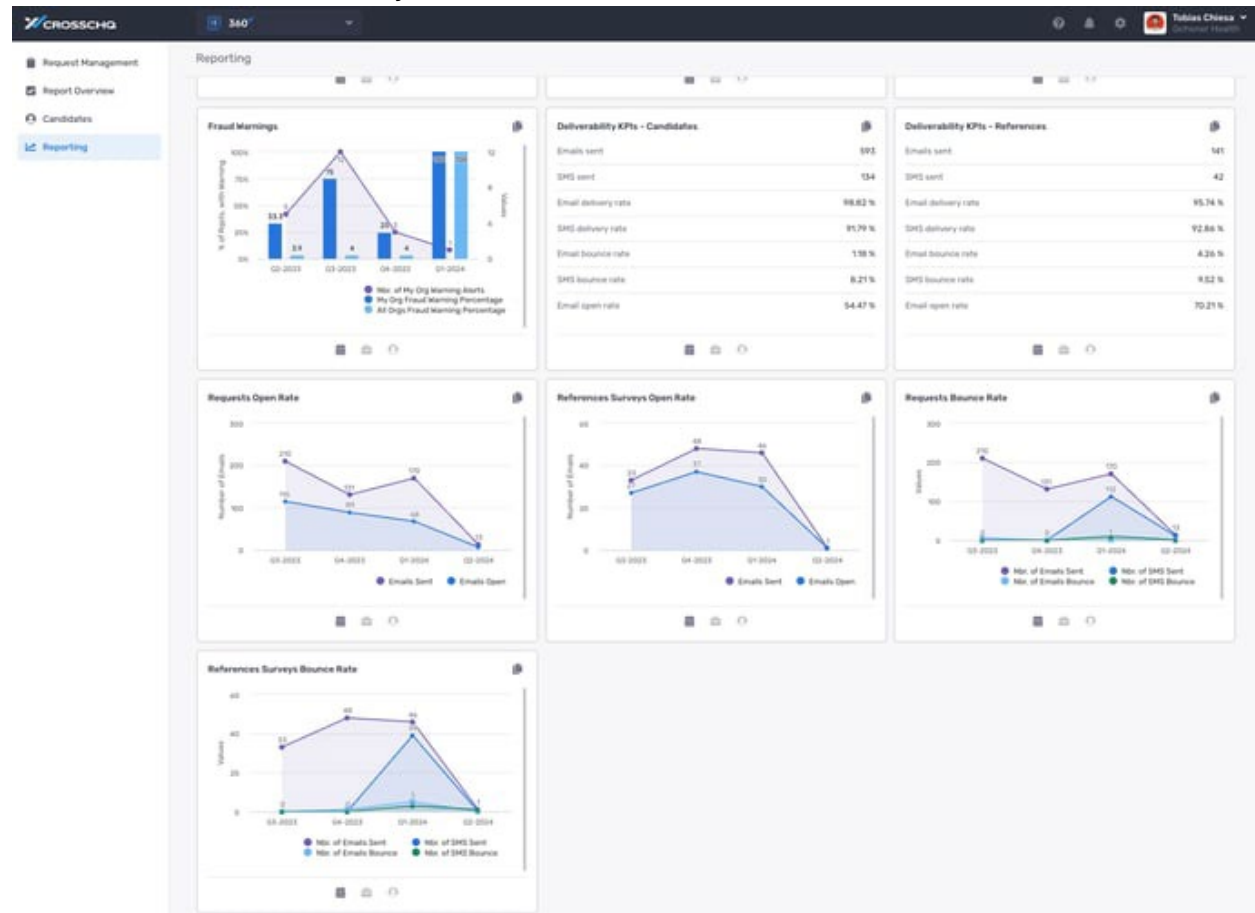
    

360 Reference Report

This chart tracks all references that have gone through a 360 request. Users can choose what columns to appear in the chart by clicking the vertical ellipsis at the top right corner and selecting Customize Report. The ellipsis also provides an option to download the report as a CSV file. The icons at the bottom allow users to filter by date range, job position, survey, and requestor.

360 Reference Report						
REFERENCE NAME	REFERENCE EMAIL	REFERENCE PHONE NUMBER	COMPLETION DATE	STATUS	TITLE	
Trevor Sullivan	tsullivan1175@gmail.com	+16154428068	---	Requested	HR	
Paisha Thomas	paisha.thomas@odysseybh...	+17656173932	---	Requested	HR	
Kandace Groher	kandaceg@odysseybh.com	+16155453041	2023-12-29	Completed	HR	
Stephanie Torres	stephanie.torres@penskem...	+16265806028	---	Requested	clerk	
Jasmine Zuniga	jasmine.zuniga@penskemot...	+16265801308	2024-01-03	Completed	Clerk	
Holly Lawson	hlawson@noblehousehotels...	+14256061111	---	Requested	Corp Director of TA	
Duncan Taylor	dht.pdx@gmail.com	+15134885649	2023-12-14	Completed	Manager	
Wendy Koc	wkoc@mymeridiantrust.com	+13076316508	2023-05-18	Completed	HR Coordinator	
Brandon Lang	blang@mymeridiantrust.com	+13037090401	2023-05-18	Completed	Loan Officer	
Kirk Samples	jace.talamantes+referencer...	+15074026092	2023-05-11	Completed	5th Grade Teacher	
						(1 2 3 4 5 ... 8)

Within the reporting section, you'll discover a comprehensive array of analytical tools comprising two tables and four graphs. These visualizations center around delivery, bounce, and open rates, for candidate and reference surveys.



To help you interpret these metrics effectively, here are some key definitions:

Email/SMS Delivered: Indicates a successful delivery when the recipient server accepts the message. Please note, that this doesn't guarantee the recipient has opened the message.

Email/SMS Bounced: This occurs when a message is rejected by the recipient server, often due to reasons like an invalid email address or a full inbox.

Email Opened: Recorded each time a recipient accesses the message.

Fraud Warnings

Presenting the "Fraud Warnings" chart, meticulously crafted to swiftly flag potential fraudulent activities for our users' attention. These alerts encompass instances such as when two or more references, or a candidate and a reference, share the same IP address while completing a reference survey. It's crucial to note that while these activities may raise suspicion, they don't inherently imply

fraudulent behavior. Nonetheless, we strongly advise recruiters to verify the authenticity of surveys, ensuring they originate from the intended reference or candidate themselves.

Finally, for those with Insights, these updates are readily available within the "Reporting 360" template.