# Reference Check Form

Use one form per reference. Confirm the candidate has authorized the check before you call. Ask the same questions for every candidate for this role, in order, and write down what the reference says as closely as you can. Do not ask about age, health, family, religion, national origin or other protected characteristics.

## CANDIDATE AND REFERENCE DETAILS

**Candidate name**

**Position applied for**

**Candidate signed reference authorization on file**

☐ Yes ☐ No: do not call

**Reference name**

**Reference job title**

**Reference organization**

**Reference phone**

**Reference email**

**Relationship to candidate**

☐ Direct manager ☐ Skip-level manager ☐ Peer / coworker ☐ Direct report
☐ Client / customer ☐ Instructor / supervisor (student or intern) ☐ Other

**Reference provided by**

☐ Candidate ☐ Found independently with candidate consent

**Checked by**

**Date of call**

## OPENING SCRIPT

"Hi [Reference Name], this is [Your Name], [Your Title] at [Company]. [Candidate Name] has applied for a [Job Title] role with us and gave your name as a reference. Do you have about 15 minutes? Everything you share will be used only for this hiring decision and kept confidential within our hiring team."

## VERIFICATION

**Dates the reference worked with the candidate: from / to**

**Candidate's job title(s) during that time**

**Matches what the candidate told us**

☐ Yes ☐ Minor difference ☐ Significant difference: see notes

**Verification notes**

## REFERENCE QUESTIONS

**1. How did you work with [Candidate Name], and how often did you see their work directly?**

**2. What were their main responsibilities?**

**3. What were they best at? Can you give me an example?**

**4. What is one area where they needed the most support or coaching? What did that look like?**

**5. How did they handle a stressful period, such as a deadline, peak volume or a difficult customer?**

**6. How reliable were they with attendance, schedules and following through on commitments?**

**7. How did they respond to feedback or correction from you?**

**8. How did they get along with coworkers and other teams? Any example?**

**9. [Role-specific question, e.g. How did they handle cash accuracy / patient documentation / quality scores?]**

**10. This role involves [one or two core demands of the new job]. How well do you think they would do with that, and why?**

**11. Why did they leave, as far as you know?**

**12. If you had the right role open, would you hire or work with them again?**

☐ Yes, without hesitation ☐ Yes, with some reservations ☐ No

☐ Declined to answer / policy prevents answering

**Explanation for answer to question 12**

**Is there anything else I should know that would help them succeed here?**

## RATINGS (COMPLETE AFTER THE CALL)

**Job performance in relevant areas**

☐ 4 - Clearly strong ☐ 3 - Solid ☐ 2 - Mixed ☐ 1 - Concern
☐ N/A - Reference could not speak to it

**Reliability and dependability**

☐ 4 - Clearly strong ☐ 3 - Solid ☐ 2 - Mixed ☐ 1 - Concern
☐ N/A - Reference could not speak to it

**Working with others**

☐ 4 - Clearly strong ☐ 3 - Solid ☐ 2 - Mixed ☐ 1 - Concern
☐ N/A - Reference could not speak to it

**Response to feedback**

☐ 4 - Clearly strong ☐ 3 - Solid ☐ 2 - Mixed ☐ 1 - Concern
☐ N/A - Reference could not speak to it

## SUMMARY

**Themes that confirm what we saw in interviews**

**Themes that contradict or add to what we saw**

**Hesitations, long pauses or carefully worded answers worth noting**

**Overall reference result**

☐ Positive ☐ Mixed: discuss with hiring manager ☐ Negative: discuss with hiring manager
☐ Inconclusive (dates and title only)

Checker signature

Date

**Date**