HRIS PROGRAMME
UAS

UNIVERSITY OF OXFORD

# HRIS Recruitment Training

# REC03

**For use by all departments whether live with e-Recruitment only or e-Recruitment and Personnel**

***Quick Reference Guide to***

# *Manage Online Applications*

## *in Core HR*

V1.10

**What's Changed?**

1. p7: Generate Applications – updated to reflect the decision to switch off the overnight process for PDF generation.

# Contents

# 1. Manage Applications & Shortlisting

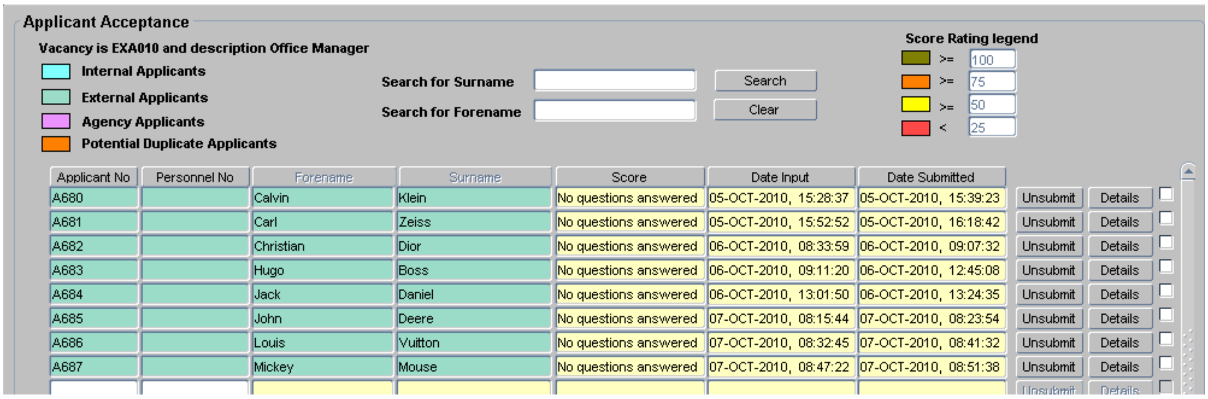
This section relates to process REC 6 Manage Applications and Shortlisting, (and should be read in conjunction with), the recruitment process outlined on the Personnel Services website at http://www.admin.ox.ac.uk/personnel/recruit/recruitproc.

## 1.1 Review and Submit Web Applicants

This will allow you to import all web applications.

**Personnel > Recruitment > Maintenance > Submit Web Applicants**

1. The *Submit Web Applicants* form will open. Enter your search criteria and click the Search button.
2. Click once into the correct row before double clicking on the relevant vacancy to open it.
3. The *Applicant Acceptance* screen will be displayed and show a list of applicants who have submitted an application.



Applicant Acceptance

Vacancy is EXA010 and description Office Manager

Internal Applicants
External Applicants
Agency Applicants
Potential Duplicate Applicants

Search for Surname | Search
Search for Forename | Clear

Score Rating legend
>= 100
>= 75
>= 50
< 25

| Applicant No | Personnel No | Forename | Surname | Score | Date Input | Date Submitted | | |
|---|---|---|---|---|---|---|---|---|
| A680 | | Calvin | Klein | No questions answered | 05-OCT-2010, 15:28:37 | 05-OCT-2010, 15:39:23 | Unsubmit | Details |
| A681 | | Carl | Zeiss | No questions answered | 05-OCT-2010, 15:52:52 | 05-OCT-2010, 16:18:42 | Unsubmit | Details |
| A682 | | Christian | Dior | No questions answered | 06-OCT-2010, 08:33:59 | 06-OCT-2010, 09:07:32 | Unsubmit | Details |
| A683 | | Hugo | Boss | No questions answered | 06-OCT-2010, 09:11:20 | 06-OCT-2010, 12:45:08 | Unsubmit | Details |
| A684 | | Jack | Daniel | No questions answered | 06-OCT-2010, 13:01:50 | 06-OCT-2010, 13:24:35 | Unsubmit | Details |
| A685 | | John | Deere | No questions answered | 07-OCT-2010, 08:15:44 | 07-OCT-2010, 08:23:54 | Unsubmit | Details |
| A686 | | Louis | Vuitton | No questions answered | 07-OCT-2010, 08:32:45 | 07-OCT-2010, 08:41:32 | Unsubmit | Details |
| A687 | | Mickey | Mouse | No questions answered | 07-OCT-2010, 08:47:22 | 07-OCT-2010, 08:51:38 | Unsubmit | Details |

4. The system will have given each applicant a unique applicant number which will be displayed in the first column

> If an applicant has requested to unsubmit an application (possibly to make a change or addition), click the Unsubmit button.

**After the closing date:**

5. Select the applications to be submitted by clicking on the tick box to the right of the relevant applications (or click the Select All button).
6. Click the Update button; this will import the applicants into Core.
7. Click the Update button.

8. A confirmation message will appear, click **OK**. The selected applications will no longer be shown in the applicant acceptance screen. Their status will show as **Applied** against the vacancy in the Core back office.

After the vacancy closing date for priority candidates, you are required to review each application received to ensure that the letter of redeployment has been attached.

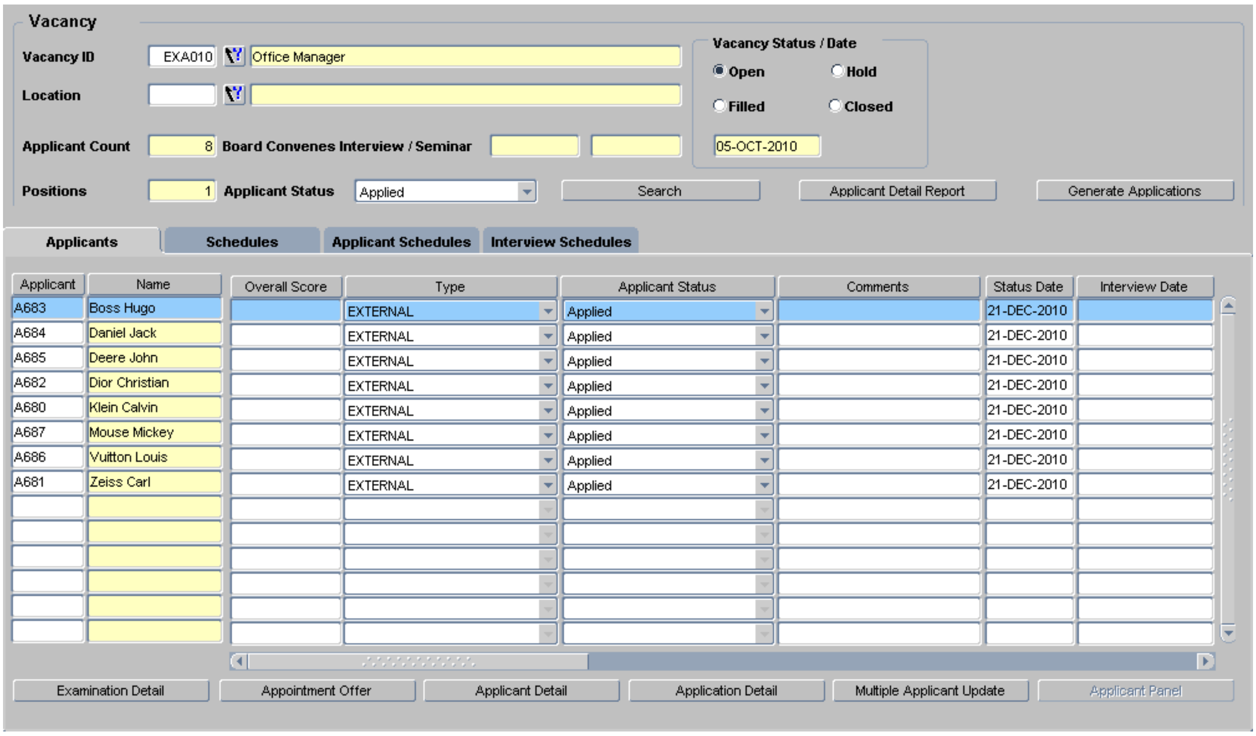
For any Priority Candidate applications received after the first closing date, the status of **Applied Late** can be chosen instead. This status may also be chosen if a vacancy has been re-opened to allow a late application to be submitted.

9. Click the button to exit the form.

## 1.2 Screen Applicants

**Personnel > Recruitment > Maintenance > Applicant Status**

1. The *Search Criteria* form will open. Enter your selection criteria (normally the **Vacancy Id** and **Applicant Status** e.g. *Applied*) and click the Search button.
2. The applicants that match the search criteria will be displayed.




After the vacancy closing date for priority candidates, you are required to review each application to check that the letter of redeployment has been attached. Where the redeployment letter has been attached you should add 'Priority Candidate' into the Comments field against the relevant applicant(s), and generate and merge their applications and forward to the selection panel for consideration ahead of the final closing date.

a. To view an applicant's application, click once in the relevant row and click the Application Detail button. The application will display in a new window.

b. To view the applications of all applicants, click on the Applicant Detail Report button. The applications will display in a new window.

It is very important to review applicants and their applications to ensure all are valid applicants e.g. check previous employees have the right to return.

In the above example, update the Vacancy Events screen to show that *Right to Return* has been checked. Refer to REC00: Recruitment Basics for further details.

3. To review the answers to questions about disciplinary matters, criminal convictions and University connections you will need to run the RECDEP_47 Private Questions report in Discoverer.

Note: These questions do not appear in the PDF application file that you go on to generate and send to the interview panel.

4. Where invalid applications are found, change the applicant status by clicking the *Status* drop-down and selecting **Invalid**. Enter the reason into the **Comments** field.
5. Click the button.

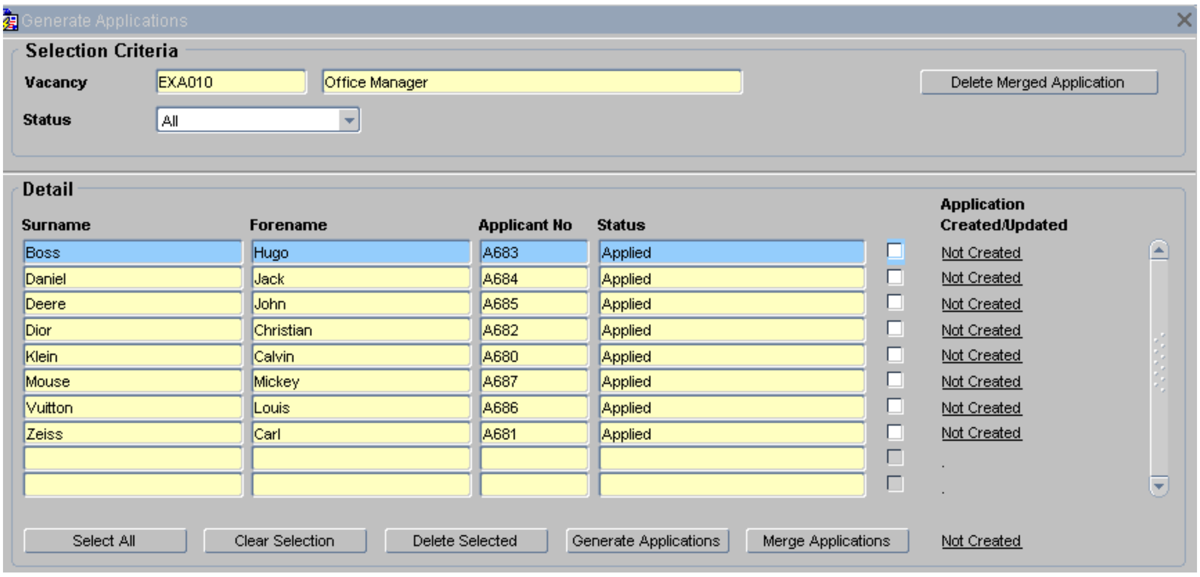
# 1.3 Generate Applications

The application submitted by each applicant is made up of a number of parts. There are the web forms completed by the applicant online, such as Referee Details and the Questionnaire and then there are attachments, such as Supporting Statements and CVs. Whilst the online parts of the application form one document, each applicant can submit up to 5 additional attachments, with each of these being held as a separate document.

The Generate Applications process combines these separate documents into a single PDF file per applicant.

## Personnel > Recruitment > Maintenance > Applicant Status

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Vacancy Id and Applicant Status e.g. Applied) and click the Search button.
2. The applicants that match the search criteria will be displayed.
3. Click the Generate Applications button. The Generate Applications screen will appear.


Generate Applications

Selection Criteria

Vacancy: EXA010 — Office Manager

Status: All

Delete Merged Application

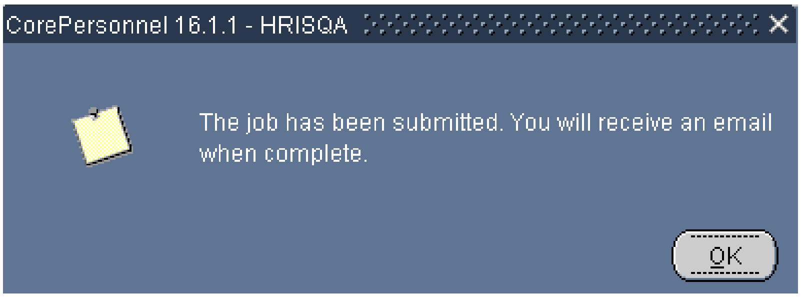
Detail

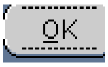
| Surname | Forename | Applicant No | Status | | Application Created/Updated |
|---|---|---|---|---|---|
| Boss | Hugo | A683 | Applied | | Not Created |
| Daniel | Jack | A684 | Applied | | Not Created |
| Deere | John | A685 | Applied | | Not Created |
| Dior | Christian | A682 | Applied | | Not Created |
| Klein | Calvin | A680 | Applied | | Not Created |
| Mouse | Mickey | A687 | Applied | | Not Created |
| Vuitton | Louis | A686 | Applied | | Not Created |
| Zeiss | Carl | A681 | Applied | | Not Created |

Select All | Clear Selection | Delete Selected | Generate Applications | Merge Applications | Not Created

4. Select all applicants for whom you wish to generate a PDF file by clicking the tick box to their right (or click the Select All button).
5. Click the Generate Applications button.

6. A pop-up message will appear;




7. Click on the  button. The pop-up window and the Generate Applications screen will close. As per the pop-up message, you will now receive an email to the email account linked to your personnel record once the job has been completed.

> In the event that there is an error when generating the PDF, you will receive an email containing a reference number. You should forward this error message to hr.systems@admin.ox.ac.uk who will resolve the issue with the application. You should **not** attempt to generate applications without first raising the error with the helpdesk.

8. Once you have received the email to confirm that your applications have been generated, return to the Applicant Status screen and click on the  button. The Generate Applications screen will appear and you will see a link to the right of each applicant. This link shows the date and time the PDF was created. You can click on this link to open and view the PDF file.
9. To merge the individual PDF files into a single PDF pack for distribution to the interview panel, proceed as follows:
   a. Select the relevant applicants by clicking the tick box to the right of each applicant (or click the  button).
   b. Click the  button.
   c. You will see a pop-up message explaining that your request has been submitted and you will be sent an email when the job has been completed.

d. Once you have received the email, return to the Generate Applications screen and open the merged application pack by clicking on the date/time stamp link in the bottom right corner of the Generate Applications screen.

e. Select **Save As** from the **File** menu to save the PDF pack to a secure location, or refer to the support website for suggested approaches to managing shortlisting packs.

OUCS offer a facility called OxFile which supports the simple and secure exchange of large files with people inside and outside the University. Refer to https://oxfile.ox.ac.uk/oxfile/ for further details.

Where there are applications for priority applicants, and the letter of redeployment has been attached, you should proceed to generate and merge these applications and forward to the selection panel for consideration as normal.

Follow steps 1.3 and 1.5 onwards contained within this quick reference guide.

To add an additional late application to the merged file, select **Delete Merged Application** and click **OK** to the warning message. Now create a new merged file following the instructions in section 1.3, but selecting only the late applicant in step 4, in order to generate their application.

**Note:** You will also create a new merged PDF when closing vacancies requiring a Work Permit, in order to keep a final record of all shortlisted applications. See section 6. Close the Vacancy

## 1.4 Manage Attachments

To view, add or ignore documents attached to the application by an online applicant:

**Personnel > Recruitment > Maintenance > Applicant Status**

10.The *Search Criteria* form will open. Enter your selection criteria (normally the Vacancy Id and Applicant Status e.g. Applied) and click the Search button.

11.Click once to highlight the row for the relevant applicant.

12.Click the Applicant Detail button.

13.Select **Vacancy Detail** in the *Select Detail* area.

14.Click once to highlight the row for the relevant vacancy.

15.Right click over the highlighted row.

16.Select **View Documents** from the shortcut menu. You will be taken to the *Document Details* tab.

**To Open a Document**

a. Click on the file name. The document will open in a new window.

**To Exclude a Document from the Selection Panel PDF File**

a. Click to place a tick in the **Ignore** column against the relevant attachment.

b. Click the button.

**To Attach an Additional Document**

a. If the additional document has been emailed to you by the applicant, save it to a secure network location.

b. Click the Load Document button. A new window will open.

c. Click the Browse... button.

d. Click the Open button.

e. Browse to select the relevant document.

f. Click the Upload button.

g. Once the upload has been successful click the Close window button to return to Core.

h. Click **Yes** to confirm the upload was successful.

i. Click the button.

If you had already generated the PDF’s for the shortlisting panel you will need to re-generate them at this point to exclude the incorrect attachment and/or include the new one.

# 1.5 Generate Shortlist Form

Use this option to generate the shortlist form for the Interview panel to complete.

**Personnel > Recruitment > Maintenance > Applicant Status**

1. The *Vacancy* screen will open.  In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant **Applicant Status** from the drop down e.g. *Applied*.
3. Click the [Search] button.  A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu.  The *Generate Letters Module* dialogue box will appear:
    a. Ensure the *Letter Group* shows **Recruitment**.
    b. Select the *Letter Type* **Shortlist Form A - Standard** or **Shortlist Form B – Extended.**
    c. Select the *Selection* option to send to **All Query Records**.
    a. Click the [OK] button.
5. Microsoft Word will open the template and merge applicant data to a new document.
6. In the new document enter the relevant criteria in the column headings.
7. Save, print and distribute the form as required.
8. Close Word and return to Core (note that after closing the document, you will also need to close the letter template).
9. Click **No** to the confirmation message.  This will stop the generation of a record in the letter history.

> If you have any priority candidates it is important to indicate these against their entry on the form.

At this stage you should:

1 Change the status of the vacancy to *Shortlisting.*

2. Update the vacancy events checklist e.g. Right to Return check.

Once shortlisting has been completed and the panel has reported back with their decisions you should:

3. Change the status of the relevant applicants to *Shortlisted* or *Rejected after Shortlisting*.

See QRG REC00 Recruitment Basics for further details on updating statuses.

# 2. Manage Interviews

This section of the guide relates to process REC 7 Manage Interviews, (and should be read in conjunction with), the recruitment process outlined on the Personnel Services website at http://www.admin.ox.ac.uk/personnel/recruit/recruitproc.

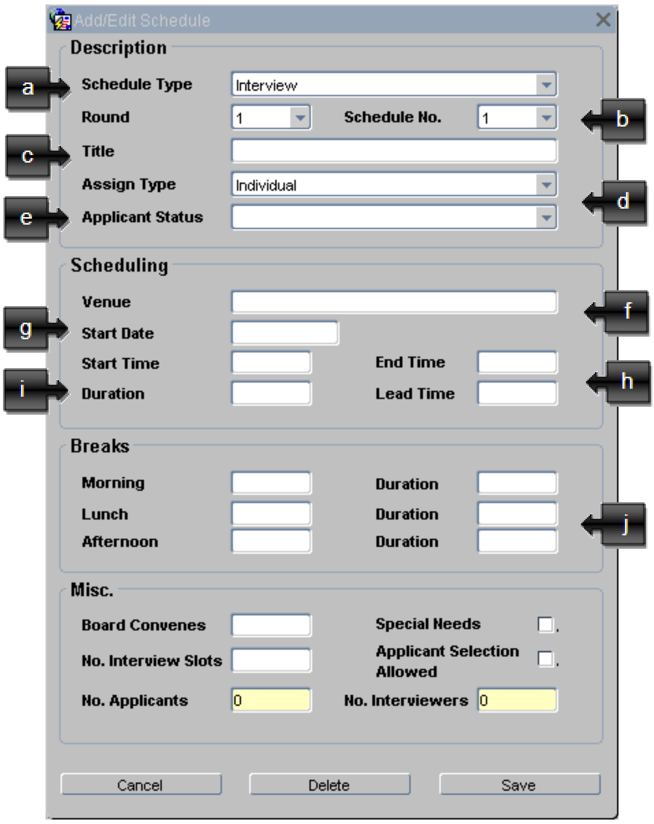
## 2.1 Schedule Interviews

**Personnel > Recruitment > Maintenance > Vacancy Detail**

1. The *Search Criteria* form will open. Enter your search criteria and click the Search button.
2. Double click the relevant vacancy to open it.
3. From the *Select Detail* area, select **Applicant Status**.
4. The *Applicant Status Maintenance* screen will be displayed. A list of applicants will be displayed.

> Ensure all applicants have the correct status, e.g. Shortlisted or Rejected after Shortlisting (see REC00 Recruitment Basics quick reference guide for further details).

5. To show only those applicants who you wish to invite to interview, select the relevant status (e.g. Shortlisted) from the **Applicant Status** drop-down in the search area at the top of the screen. Click the Search button.
6. Select the **Schedules** tab.
7. Click the Add Schedule button. The *Add/Edit Schedule* screen will be displayed.




a. Select the **Schedule Type** e.g. Interview.

b. Select the **Round** and **Schedule Number** (if required).

c. Enter a **Title** e.g. Interviews for [job title].

d. From the **Assign Type**, select whether you want to schedule the interviews on an individual basis or as a group.

e. Select the **Status** of the applicants that you wish to invite (e.g. Shortlisted).

f. Enter the name of the **Venue**. This can include the full address so that it can be merged into the interview invite letter.

g. Enter the **Start Date** for the interviews (remember to use the format dd-mmm-yyyy).

h. Enter the **Start Time** and **End Time** for the interviews (e.g. between 9:00 and 17:00).

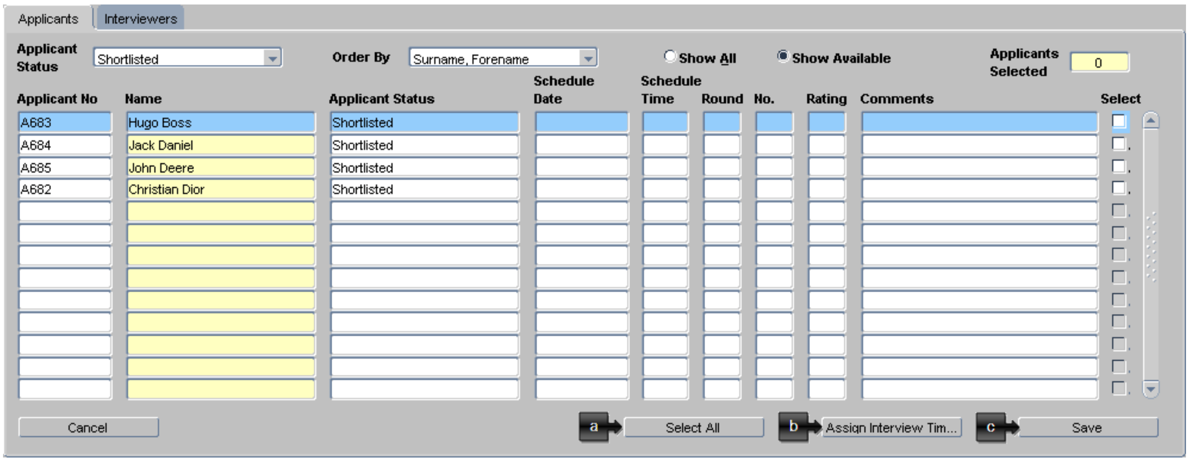
i. Enter the **Duration** and **Lead Time** (time after each interview) for each interview in minutes.

j. **Breaks** - enter the time and duration (in minutes) for each break required by the panel.

8. Click the 

button.

9. Click the Assign Schedule button. The *Assign Applicant / Interviewer* screen will be displayed.




a. Select the applicants you wish to invite for interview by selecting the tick box to the right of their row (or click the Select All button).

b. Click the Assign Interview Tim... button. A time will be entered into the schedule time column for each interviewee selected.

c. Click the Save button. A confirmation message will appear, click **OK**.

10. Select the **Interviewers** tab.

11. Select the interviewers you wish to use by selecting the tick box to the right of their row, (or click the Select All button).

In order to do this you must first have recorded who the interviewers are. See the section entitled ‘Add / Maintain Interview Panel’ in QRG REC01 Creating a Vacancy for further details.

12. Click the Save button.

13. Select the **Applicant Schedules** tab to see the scheduled date and time for each applicant.

14. Select the **Interview Schedules** tab to see the scheduled date and time for each interviewer.

# 2.2 Generate Interview Invites

For an example of how to send correspondence as email please see the 'Send Rejection Emails' section within this guide.

**Personnel > Recruitment > Maintenance > Applicant Status**

1. The *Vacancy* screen will open. In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant applicant status e.g. *Shortlisted.*
3. Click the Search button. A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu.
5. Ensure the **Letter Group** shows *Recruitment* and select the relevant letter type e.g. *Invite for first interview.*
6. Select the relevant option, either, **All Query Records** (to send to all the applicants returned from your search) or **Current Record** (to send to just the applicant currently selected).
7. Ensure the **Send Email** field is unchecked.
8. Click the OK button. The letter will be generated.
9. In Word, respond to any Fill In prompts as required.
10. If necessary, amend the text further.
11. Save, print and post the letter as required.
12. Close Word and return to Core (note that after closing the letter document, you will also need to close the letter template).
13. Click **Yes** to the confirmation message. This will generate a record in the letter history screen.

For help on how to customise your letter templates please contact the HRIS Support Centre.

> Once all the interview invitations have been sent you should change the status of the vacancy to *Interview* and the applicant status of invited applicants to *Invited to Interview 1* (see QRG REC00 Recruitment Basics for further details).
>
> N.B. If you are planning a second round of interviews, once the invitations have been sent for round 2, change the applicant status of these applicants to *Invited to Interview 2*.

## 2.3 Generate Rejection Emails

This example uses the Core email functionality to generate correspondence. For an example of how to send correspondence as a Word document please see previous section above.

**Personnel > Recruitment > Maintenance > Applicant Status**

1. The *Vacancy* screen will open. In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant applicant status e.g. *Rejected at Shortlisting* or *Rejected at Interview 1*.
3. Click the Search button. A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu.
5. Ensure the **Letter Group** shows *Recruitment* and select the relevant letter type e.g. **REJECTION AFTER SHORTLISTING** or **REJECT – PRIORITY CANDIDATE APPT.**
6. Select the relevant option, either, **All Query Records** (to send to all the applicants returned from your search) or **Current Record** (to send to just the applicant currently selected).
7. Click to select the **Send Email** field.
8. Click the OK button. The *Send Email* screen will be displayed.
9. Amend the email address shown in the **From** field to the email address you wish people to reply to.
10. Click the Apply to All button to apply the new email address to all emails in this batch.

11. Whilst this should not be required for rejection emails, you can amend the content of the email if necessary.

> If you have selected multiple recipients for the email, and wish to amend the email text, edit each in turn, navigating through the list of recipients by using the Next>> button.

## 2.4 Manage Attachments to Emails

If you wish to add an attachment to the email/s, follow section **2.3** above then:

1. Click the Attachments button.
2. Click the Browse button.
3. Browse to the document you wish to attach and click it once to select it.
4. Click the Open button.
5. To add further attachments, click into the next row down and repeat steps 13 – 15 above.
6. Click the Save button.
7. A confirmation message will display, click the OK button.
8. Click the Close button.
9. To add the same attachment to all emails, click the Apply to All button.
10. Click the Send All button. A confirmation message will appear, click **OK**.

> Note: If you use the email type 'GENERIC EMAIL TEMPLATE' you must add an attachment for all recipients of that email.
>
> The system can be used to administer different rounds of recruitment selection by repeating the steps outlined in sections 1.3 to 2.4 and selecting appropriately.
>
> You should be careful to ensure the correct Vacancy and Applicant statuses have been applied at each stage. Please see QRG REC00: Recruitment Basics for further details of the uses of this information.

## 2.5 Define Applicant Events

Having completed the interview exercise the selection panel will hopefully have selected a preferred candidate. Depending on the candidate and the post, specific checks will be required.

**Personnel > Recruitment > Maintenance > Vacancy Detail**

1. If necessary, search for and open the relevant vacancy.
2. Select **Events** from the *Select Details* area. The events tabs will be displayed.
3. Select the **Applicant Events** tab.
4. For each check that is required for the preferred candidate place tick in the checkbox to the right of the item.
5. Click the Cascade Events To Applicants button. A confirmation message will appear, click **OK**.

## 2.6 View Referees

It will be possible to view the referee details once an applicant has made an application for a vacancy.

**Personnel > Recruitment > Maintenance > Applicant Details**

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Applicant No., click the button and select the applicant from the list provided) and click the Search button.
2. Click once to highlight the row for the relevant applicant.
3. Double click on the highlighted row to open the Applicant Maintenance screen.
4. Select **Vacancy Detail** in the *Select Detail* area.
5. Click once to highlight the row for the relevant vacancy.
6. Right click over the highlighted row.
7. Select **View References** from the shortcut menu. You will be taken to the *Reference Details* tab.
8. To view the full details of a referee, click the Details button.
9. To close the referee details, click the Cancel button.

10.To exit the referee details screen, click the button.

> Where applicant details have been added via the manual route, the referee details can be edited and added to.
>
> If the applicant has applied online, the referee details can only be viewed.

## 2.7 Edit Referee Details – manual applicants only

Referee details may have changed since the time of application. Use this section to amend the referee details for any applications which have been entered via the manual application route.

**Personnel > Recruitment > Maintenance > Applicant Details**

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Applicant No., click on the button and select the applicant from the list provided) and click the Search button.
2. Click once to highlight the row for the relevant applicant.
3. Double click on the highlighted row to open the Applicant Maintenance screen.
4. Select **Vacancy Detail** in the *Select Detail* area.
5. Click once to highlight the row for the relevant vacancy.
6. Right click over the highlighted row.
7. Select **View References** from the shortcut menu. You will be taken to the *Reference Details* tab.
8. To access the full details of a referee, click the Details button.
9. Make the required changes.
10. Click the Save button.
11. To exit the referee details screen, click the button.

## 2.8 Add Referee Details

The applicant may be required to supply further referee details. Use this section to add details of further referees.

**Personnel > Recruitment > Maintenance > Applicant Details**

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Applicant No., click on the button and select the applicant from the list provided) and click the Search button.
2. Click once to highlight the row for the relevant applicant.
3. Double click on the highlighted row to open the Applicant Maintenance screen.
4. Select **Vacancy Detail** in the *Select Detail* area.
5. Click once to highlight the row for the relevant vacancy.
6. Right click over the highlighted row.
7. Select **View References** from the shortcut menu. You will be taken to the *Reference Details* tab.
8. To add a new referee, click the Add Reference Details button.
9. Complete the fields as required.
10. Click the Save button.
11. To exit the referee details screen, click the button.

# 3. Manage Repeat Recruitment

This section of the guide relates to process REC 7a Manage Interviews and should be read in conjunction with the recruitment process outlined on the Personnel Services website at:

http://www.admin.ox.ac.uk/personnel/recruit/recruitproc.

On occasions, having completed the shortlisting and interview process, it may not have been possible to choose a preferred candidate.

## 3.1 Recruitment Re-run Required - Advertising Not Being Repeated

**Personnel > Recruitment > Maintenance > Vacancy Details**

Where a preferred candidate has not been found and it is not planned for the advertising to be repeated then change the vacancy status to ‘No Appointment Made’ and close the vacancy.

Ensure all applicants are correctly updated with their final status before you do so.

Refer to **6 Close the Vacancy** at the end of this quick reference guide.

## 3.2 Recruitment Re-run Required - Advertising To Be Repeated

Where it is planned for the advertising to be repeated, as part of the recruitment re-run, it will need to be decided whether the vacancy will now be advertised externally. Approval is required from the Joint Group prior to the vacancy being advertised externally.

In order to seek approval, a case needs to be submitted to the Joint Group.

Use the Recruitment Protocol Form available on www.admin.ox.ac.uk/personnel/recruit/recruitproc/planapprove/protocol/

Notification will be sent from the Joint Group to advise whether the case for external advertising has been approved or rejected.

### 3.2 a Request for External Advertising Rejected

**Personnel > Recruitment > Maintenance > Vacancy Details**

After being notified that the Joint Group has rejected your request for external advertising, it will need to be decided whether to repeat the internal-only advertising.

Where it is decided not to repeat the internal-only advertising, then the vacancy should be closed with a status of ‘No Appointment Made’. All applicant statuses must be updated to reflect the final status before closing the vacancy.

Refer to **6 Close the Vacancy** at the end of this quick reference guide.

If it has been decided that internal-only advertising will be repeated, then start the process again by creating a new vacancy.

Please refer to REC01: Creating a Vacancy in CoreHR for further details.

The original vacancy needs to be closed; refer to **6 Close the Vacancy** at the end of this quick reference guide.

Remove the appointment from the old vacancy and add to the new one.

> To set up the vacancy and recruitment details, refer to REC01: Creating a Vacancy in CoreHR quick reference guide.
>
> To update the Vacancy Events; refer to REC00: Recruitment Basics in CoreHR quick reference guide.

### 3.2 b Request for External Advertising Approved

**Personnel > Recruitment > Maintenance > Vacancy Details**

Where external advertising has been approved by the Joint Group and confirmation has been received by the recruitment administrator, create a new vacancy, (refer to REC01: Creating a New Vacancy in CoreHR quick reference guide).

Update the old vacancy with a status of ‘No Appointment Made’ and ensure all applicant statuses have been updated to reflect the final status before closing the old vacancy.

Refer to **6. Close the Vacancy** at the end of this quick reference guide.

Remove the appointment from the old vacancy and add to the new one.

# 4. Appoint New Employee: Replan Appointment

This section of the guide relates to process REC 7b Appoint New Employee: Replan Appointment and should be read in conjunction with the recruitment process outlined on the Personnel Services website at http://www.admin.ox.ac.uk/personnel/recruit/recruitproc.

Where a preferred candidate has been appointed or a new starter has not started, i.e. not commenced, or has left shortly after commencement, this process enables you to review whether there is an alternative candidate who could be approached, or the vacancy needs to be re-advertised.

Where it is decided to refill the appointment, it should be checked whether the planned appointment is within 6 months of the original request. Where the planned appointment is within 6 months, then no protocol approval is required. The departmental approver or divisional approver, (depending on protocol required), can send an off-system request via email to the Reward Team to request a new a planned appointment.

Once received, the Reward Team will review the request for a new planned appointment and will notify you when the planned appointment has been authorised.

Contact the Reward Team: Reward@admin.ox.ac.uk

If required, seek approval for external advertising:

www.admin.ox.ac.uk/personnel/recruit/recruitproc/planapprove/protocol/.

## 4.1 Possible Alternative Candidate Interviewed?

### 4.1a Yes

1) Where a possible alternative candidate has been interviewed, contact them in the first instance to see if they are still interested in the role.

2) Where the alternative candidate is still interested, the new planned appointment will need to be linked to the original vacancy, refer to REC01: Creating a Vacancy within CoreHR quick reference guide.

Update the Applicant Status to Preferred Candidate and follow through the process contained within this guide, '5.1 Record Offer'.

**Personnel > Recruitment > Maintenance > Vacancy Details**

### 4.2 a No

1) Where a possible alternative candidate has been interviewed, but is not now interested in the role, or an alternative had not been interviewed, set up a new vacancy and add in the recruitment details as required. Refer to REC01: Creating a Vacancy in CoreHR quick reference guide.

2) Follow the steps contained in REC01: Creating a Vacancy in CoreHR quick reference guide, to link the new planned appointment to the new vacancy.

3) Update Vacancy Events to show that the vacancy is being re-advertised and follow the steps within REC00: Recruitment Basics and REC01: Creating a Vacancy in CoreHR quick reference guides and continue with the standard recruitment process.

# 5. Manage Offers & Manage Checks

This section of the guide relates to process REC 8 Manage Offers and 9 Manage Checks, (and should be read in conjunction with), the recruitment process outlined on the Personnel Services website at http://www.admin.ox.ac.uk/personnel/recruit/recruitproc.

Having made a verbal offer to your preferred candidate the checks linked to the applicant will need to be initiated off-system and then logged.

At this stage you should:

1 Change the status of the vacancy to *OFFER MADE.*

2. Update the applicant events checklist when checks are initiated.

3. Change the status of the applicant to *Offer Made (if pre-personnel 'live')*, or *Offer Made – Personnel (*if post-personnel 'live'). See 5.1 below for subsequent steps.

Note: The updating of these statuses at each stage is imperative for equal opportunities monitoring and reporting.

See QRG REC00: Recruitment Basics for further details on updating statuses.

## 5.1 Record Offer (post personnel go live)

**Personnel > Recruitment > Maintenance > Applicant Status**

If your preferred candidate applied via e-recruitment, having made a verbal offer to them the details should be captured in the Recruitment module. **(Section A1)**

When the candidate accepts the offer, the details should be updated against the relevant vacancy **(Section A2)** before the vacancy is closed.

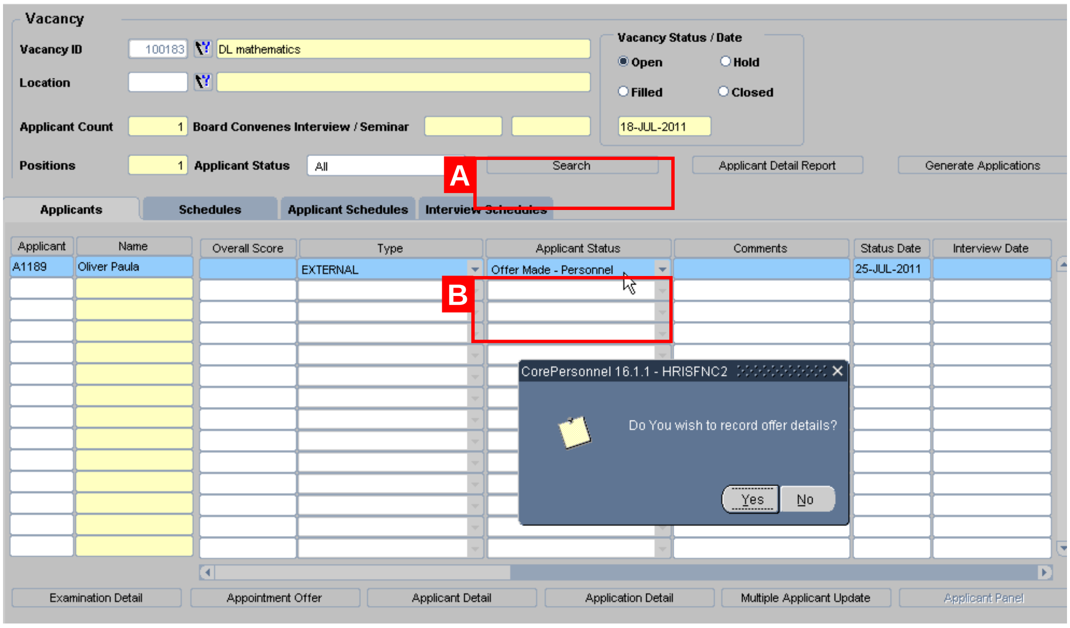
**Note**: ‘Recruitment Administrator’ access is required for this action.
**Both sections A1 and A2 must be completed.**

## Recruitment > Maintenance > Applicant Status

### A1. Record verbal offer

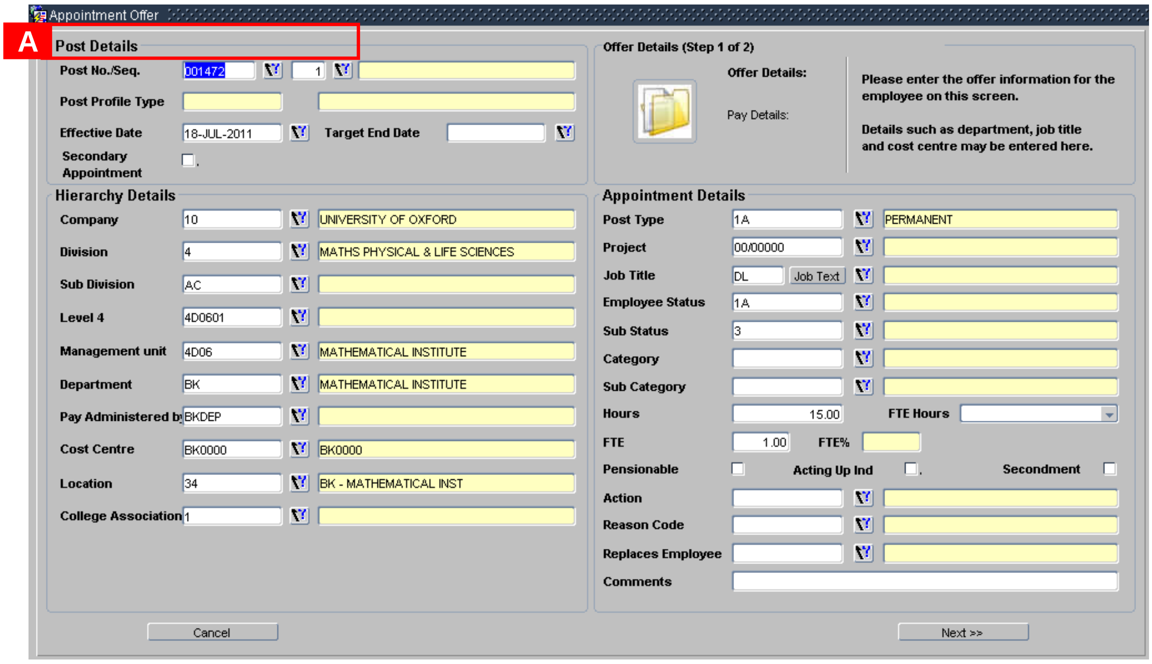
**1.** Enter the vacancy number into the **Vacancy ID** field and click Search **[A]**.

**2.** Update the status of the preferred candidate to **Offer Made – Personnel [B]**.




**3.** A message will be displayed ‘Do you wish to record offer details?’ click the Yes button.

In the *Appointment Offer* screen:




**4.** Select the **Post Number** **[A]** using the LoV icon then press the [**Tab**] key.

**5.** Select the **post number sequence** **[A]** using the LoV icon then press the [**Tab**] key.

> **Note**: If the post number or post number sequence you are expecting is not in the LoV list then contact HRIS Support.

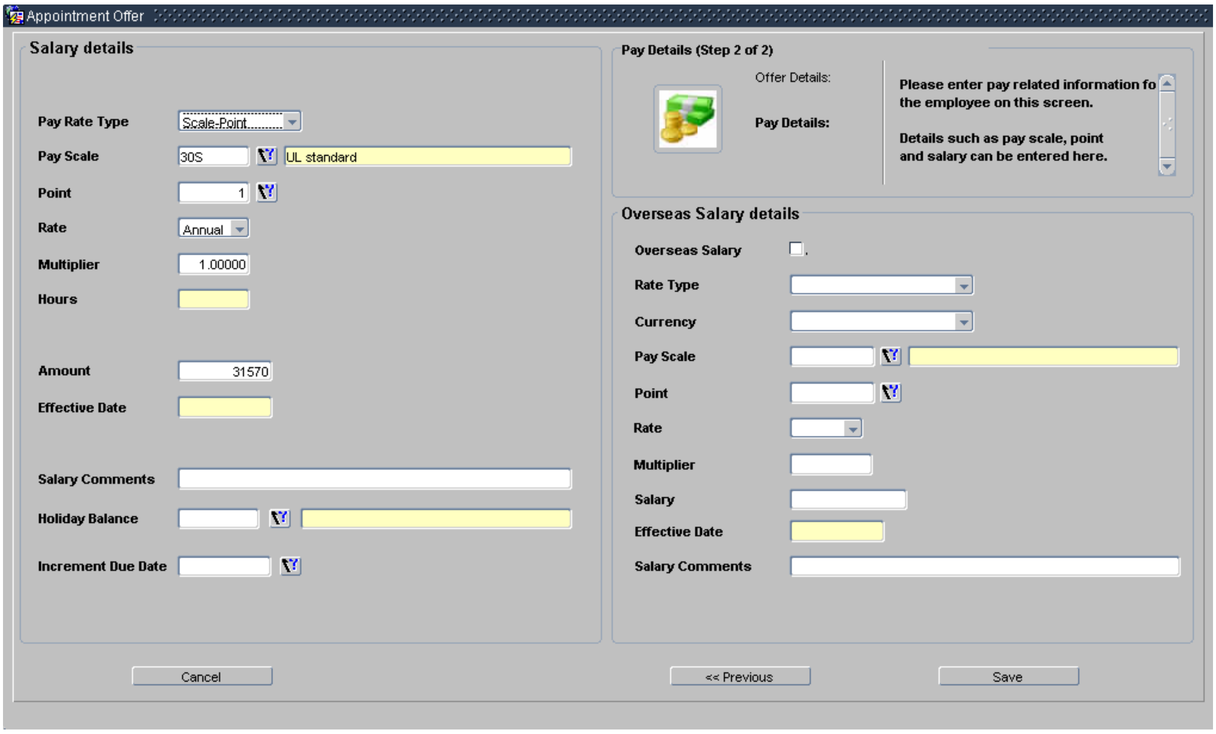
**6.** Enter/change any details relevant to the offer details e.g.

> **Note**: If preferred, this information can be left for now and completed at appointment stage.

| Field Name | Description |
|---|---|
| **Effective date** | Expected start date. |
| **Job Text** | This is the actual job title that will appear in the template documents, such as the conditional offer/contract letter. |
| **Employee status** | e.g. Permanent, Fixed term. |

| | |
|---|---|
| **Sub Status** | e.g. Full time, Part time. |
| **Hours** | Expected working hours per week, as agreed with the individual. |
| **FTE Hours** | Standard FTE hours for this role (depends on grade). |
| **Comments** | Record anything of interest about the offer made. |

**7.** Click the Next >> button:




**8.** If required change/check any details relevant to the pay details.

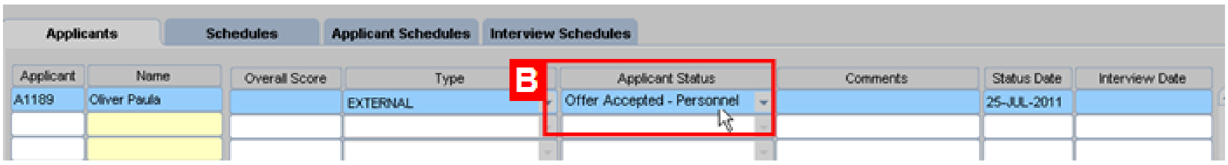
| Field Name | Description |
|---|---|
| **Point** | Grade point |
| **Multiplier** | Ensure this matches the FTE |

**9.** Click the Save button, then click the OK button. The *Applicant status* window is re-displayed.

**A2. Record accepted offer**

When the verbal offer has been accepted, the details must be captured in the recruitment module in order that they can be pulled through to personnel.

Follow steps 1-9 above but remember to update the status of the preferred candidate to **Offer Accepted – Personnel**.




## 5.2 Complete Applicant Events

**Personnel > Recruitment > Maintenance > Applicant Detail**

1. Search for and open the relevant applicant record.
2. Select **Events** from the *Select Details* area. The event tab will be displayed.
3. As each required event is initiated, click in the **Checklist** field to add a tick. The completion of each required event will be recorded within CoreHR personnel. (See QRG PA0: Pre Arrival for further details).
4. Click the button.

Ensure you also update the **Vacancy Events** screen to mark all the relevant Equal Opportunities monitoring events.

# 6. Close the Vacancy

**Personnel > Recruitment > Maintenance > Vacancy Detail**

These steps must be completed once the vacancy has been filled, or if it needs to be closed for any other reason.

## 6.1 Ensure pre-requisites have been met:

- The Applicant and Vacancy Events **MUST** be completed with all information relevant to the vacancy. This forms part of the review

of recruitment procedures and practices and ensures the 'Code of Practice on Staff Recruitment and Selection' is operating effectively.
- The Applicant and Vacancy Statuses **MUST** be updated before a vacancy to reflect the latest/final status for each. Where the vacancy is being closed due to a direct appointment, use the vacancy status 'Appointment Made'. Further information can be found in the Statuses and Events guidance which can be found here http://www.admin.ox.ac.uk/personnel/recruit/recruitproc/vacancysetup/

## 6.2 For vacancies requiring Work Permit:

For vacancies requiring a work permit, UKBA (the UK Border Agency) requires you to keep a copy of all applications, in their original format, relating to all applicants who were shortlisted for that vacancy.

The following steps have been confirmed to meet this requirement:

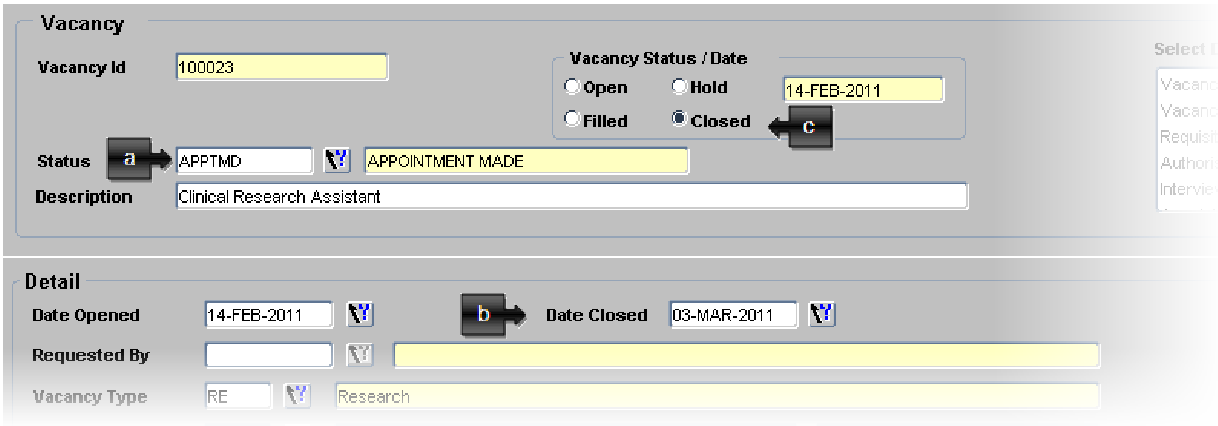
**Personnel > Recruitment > Maintenance > Applicant Status**

1. Repeat steps 1, 2 and 3 from section 1.3 Manage Applications in this guide in order to open the 'Generate Applications' window for the vacancy.
2. Click [Delete Merged Application]. This will remove the date and time link in the bottom right hand corner of the Generate Applications window and will therefore remove the full PDF application pack initially created for the Selection Panel.
3. Still within the same window, put a tick in the checkbox next to each candidate who had been shortlisted for interview.
4. Click [Merge Applications]. The system will merge the selected applicants into a combined PDF file of just the shortlisted applicants. Once complete, a link will appear to the right of the button showing the date and time the PDF was created. The file should open automatically.
5. If necessary, click the date and time link to open the PDF. Select **Save As** from the **File** menu to save this file to a secure location for reference in relation to UKBA queries.

## 6.3 Enter Closing Date and Final Status:

**Personnel > Recruitment > Maintenance > Vacancy Detail**

1. The *Search Criteria* form will open. Enter your selection criteria and click the Search button. The *Vacancy Detail* screen will be displayed.




   a. Select the appropriate vacancy status e.g. *Appointment Made* or *No Appointment Made.*

   b. Enter a date into the **Date Closed** field.

   c. Select the **Closed** radial in the *Vacancy Status/Date* section of the screen. Do not use the '*Filled'* or '*Hold'* radial.

2. Click the  button.