

# REC04 - Managing vacancies and appointments

There are various situations where events don't go as planned and changes need to be made. This guide covers the most common scenarios and simple steps to correct them. Where more complex actions are required you are referred to the relevant QRG.

**What's changed?**  
Clarification added on appointing an applicant from a different vacancy.  
**Feb 19**



**Note:** When you attach a post/appointment to a vacancy, the *status* of the appointment changes to Recruiting. This stops it from appearing in the New Appointments Post tab and ensures that you can only offer it to someone who applies for the vacancy it is attached to. For this reason it is often necessary to unlink the appointment and vacancy to resolve an issue.

This guide covers the following process steps:

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## A. Failed recruitment

### Scenarios

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#### Scenario 1: Re-advertise for same post

When a recruitment exercise fails to lead to an appointment the post and planned appointment can be re-used, but a new vacancy is required. To re-advertise the post:

- Unlink the original appointment from the vacancy Section B:1
- Close the failed vacancy Section B:2
- Create a new vacancy manually Section B:3

You can now proceed with preparing the vacancy for advertising following **QRG: REC01 Managing a vacancy**

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#### Scenario 2: Re-advertise at a different grade

When a recruitment exercise fails to lead to an appointment the decision may be made to adjust the duties of the post and advertise at a different grade. The original post must be made dormant. In this scenario follow the steps below:

- Unlink the original appointment from the vacancy Section B:1
- Close the failed vacancy Section B:2
- Email the Reward Team to request that the original unused post is made dormant

You can now proceed with raising a new staff request for the new post following **QRG: RQ1 Raising and approving a staff request.**

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#### Scenario 3: Failed Recruitment - Advertising Not Being Repeated

Where a preferred candidate has not been found and it is not planned for the advertising to be repeated, follow the steps below:

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- Ensure all applicants are correctly updated with their final status Section B:6
- Change the vacancy status to 'No Appointment Made' and close the vacancy Section B:2

## Scenario 4: Make a direct appointment

When a recruitment exercise fails to lead to an appointment the decision may be made to make a direct appointment. Follow the steps below:

- Unlink the original appointment from the vacancy Section B:1
- Close the failed vacancy Section B:2

You can now proceed with the direct appointment following **QRG: PA2g Direct Appoint**

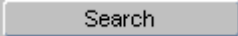
## Scenario 5: Appoint an applicant who applied for a different vacancy

When a recruitment exercise fails to lead to an appointment there may be an applicant from a different vacancy who is ideal for the post and so the decision is made to appoint them. You can attach the applicant to the vacancy you wish to appoint them to, only where the vacancy has been advertised, to do this follow the steps below:

### CorePersonnel > Recruitment > Recruitment Maintenance > Applicant Detail

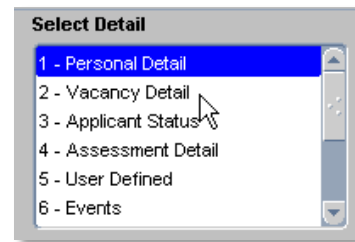
The screenshot shows a web application window titled "Applicant Maintenance". It features a "Selection Criteria" section with input fields for Applicant No (A163649), Personnel No, NI number, Name, and Address. A dropdown menu is open for the Name field, showing "Beaumont Giles". There are "Search", "New", and "Clear" buttons. Below this is an "Applicant Detail" table with columns for Applicant No, Name, Personnel No, Applicant Type, Address, Home Phone, Mobile Phone, and Email Address. The table contains one row with the following data:

| Applicant No | Name           | Personnel No | Applicant Type | Address            | Home Phone   | Mobile Phone | Email Address |
|--------------|----------------|--------------|----------------|--------------------|--------------|--------------|---------------|
| A163649      | Beaumont Giles |              | EXTERNAL       | High Street Oxford | 01865 123456 |              |               |

1. Complete search criteria as required and click  to find the relevant applicant.


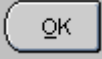



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2. Double click to select the applicant.
3. Go to Select Detail > Vacancy Detail.



The *Applicant Maintenance* window opens:

| Application | Vacancy ID | Location   | Applicant Status |
|-------------|------------|------------|------------------|
| Detail      | 118933     | Technician | SHL Shortlisted  |
| Detail      |            |            |                  |
| Detail      |            |            |                  |

4. Click the  icon on the toolbar to add a new row.
5. Select the relevant advertised vacancy from the list of values in the Vacancy ID field (scroll across to the right to see the Vacancy ID) and click .
6. Click  to link the applicant to the vacancy and . Then  out of the record as required.
7. Record the offer following **QRG: REC03 Managing online applications section C**

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## Scenario 6: Manage Repeat Recruitment

### 6.1 Request for External Advertising **Rejected**

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

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6.1.1. Where it is decided not to repeat the internal-only advertising follow the steps below:

- Close the original vacancy with the status '**No Appointment Made**'. Section B:2



**Note:** All applicant statuses must be updated to reflect the final status before closing the vacancy.

6.1.2. If it has been decided that internal-only advertising will be repeated follow the steps below:

- Remove the appointment from the old vacancy Section B:1
- Close the original vacancy with the status '**No Appointment Made**'. Section B:2
- Create a new vacancy manually Section B:3
- Link the original post/appointment to the new vacancy. Section B:4



**Note:** All applicant statuses must be updated to reflect the final status before closing the vacancy.

## 6.2 Request for External Advertising **Approved**

Where external advertising has been approved by the Joint Group and confirmation has been received by the recruitment administrator, follow the steps below:

- Unlink the appointment from the original vacancy Section B:1
- Close the original vacancy with the status '**No Appointment Made**'. Section B:2
- Create a new vacancy manually following the guidance in **QRG REC06 Creating a manual vacancy**. Section B:3
- Link the original appointment to the new vacancy Section B:4

You can now proceed with preparing the vacancy for advertising following **QRG: REC01 Managing a vacancy**

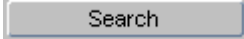


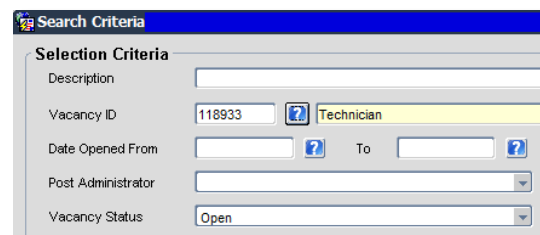
**Note:** All applicant statuses must be updated to reflect the final status before closing the original vacancy.

## B. Process steps

### 1. Unlink the appointment from the original vacancy

CorePersonnel > Recruitment > Recruitment Maintenance > Vacancy Detail

- 1.1. Complete search criteria as required and click  to find relevant vacancy.

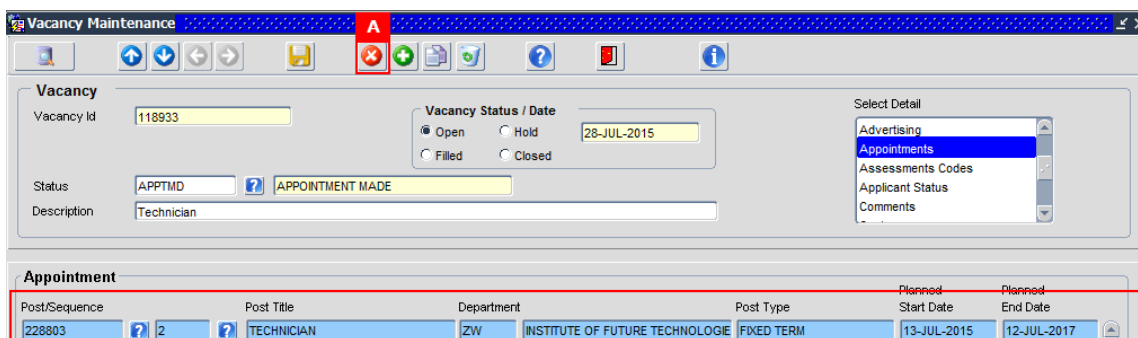


The screenshot shows a 'Search Criteria' dialog box with the following fields:

- Description: [Empty]
- Vacancy ID: 118933
- Post Title: Technician
- Date Opened From: [Empty] To: [Empty]
- Post Administrator: [Empty]
- Vacancy Status: Open

- 1.2. Double click to open the vacancy.

- 1.3. Go to **Select Detail > Appointments**, the Vacancy Maintenance window opens:



The screenshot shows the 'Vacancy Maintenance' window with the following details:

- Vacancy ID: 118933
- Vacancy Status / Date: Open, 28-JUL-2015
- Status: APPTMD, APPOINTMENT MADE
- Description: Technician
- Select Detail: Advertising, **Appointments**, Assessments Codes, Applicant Status, Comments




| Post/Sequence | Post Title | Department | Post Type                       | Planned Start Date | Planned End Date        |
|---------------|------------|------------|---------------------------------|--------------------|-------------------------|
| 228803        | TECHNICIAN | ZW         | INSTITUTE OF FUTURE TECHNOLOGIE | FIXED TERM         | 13-JUL-2015 12-JUL-2017 |

- 1.4. Highlight the appointment and Click the delete button [A] to unlink the appointment.

- 1.5. Click  and .


### 2. Close the original vacancy

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- 2.1. Select the appropriate vacancy status e.g. **No Appointment Made**.
- 2.2. Enter current date in the **Date Closed** field.
- 2.3. Select the **Closed** radial in the Vacancy Status/Date section of the screen.
- 2.4. Click  and   out of the record as required.

## 3. Create new vacancy manually and complete setup

**CorePersonnel > Recruitment > Recruitment Maintenance > Vacancy Detail**

1. The *Search Criteria* form will open. To create a new vacancy, click the  button.
2. The *Vacancy Maintenance (Vacancy Detail)* screen will open. The **Vacancy ID** will have been automatically created. Make a note of this number.

The *Vacancy Maintenance (Vacancy Detail)* screen will open:

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### 3.1. Check/update as applicable:


| Field                | Description   |
|----------------------|---|
| <b>Status</b>        | Select the <b>Status</b> as DRAFT   |
| <b>Description</b>   | Enter the actual Job Title into the <b>Description</b> field (in upper & lower case). |
| <b>Date Opened</b>   | Select the <b>Date Opened</b> to be todays date                                       |
| <b>Requested By</b>  | Select the <b>Requested By</b> to be your name  |
| <b>Vacancy Type</b>  | Select the appropriate <b>Vacancy Type</b>  |
| <b>Job Title</b>     | Select the appropriate <b>Job Title</b> to match the Post                             |
| <b>Company</b>       | Select the appropriate <b>Company</b> to match the Post                               |
| <b>Department</b>    | Select the appropriate <b>Department</b> to match the Post                            |
| <b>Location</b>      | Select the appropriate <b>Location</b> to match the Post                              |
| <b>Pay Scale</b>     | Select the appropriate <b>Pay Scale</b>   |
| <b>Position Type</b> | Select the appropriate <b>Position Type</b>   |

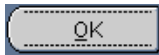
3.2. Click . The **Vacancy ID** will have been automatically created. Make a note of this number.

3.3. Select the **Recruitment Opens** date from the List of Values, and the opening time from the drop down list.



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3.4. Select the **Recruitment Closes** date from the List of Values, and the closing time **(mid-day)** in the next field from the drop down list. Click the save  and



## 4. Link the post/planned appointment

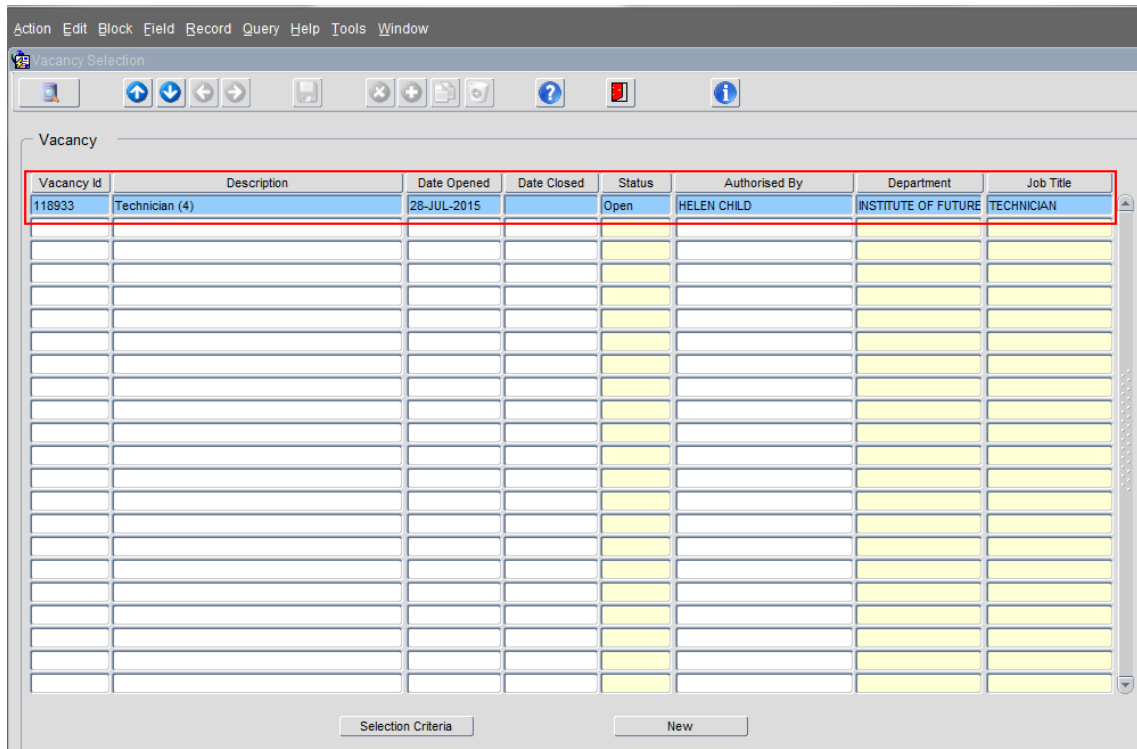
**Core Personnel > Recruitment > Recruitment Maintenance > Vacancy Detail**

The *Search Criteria* screen will open:

4.1. To search for vacancy, enter the Vacancy ID and click the  button.

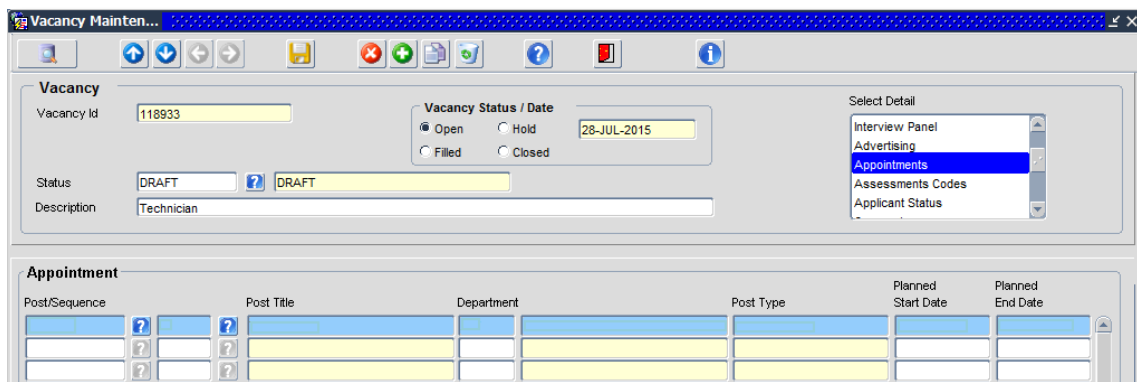
4.2. The Vacancy Selection screen will display:

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4.3. To open the vacancy, double-click onto the record. The *Vacancy Maintenance* screen will open.

4.4. From Select Detail click on to **Appointments**. The lower part of the screen will be as shown below:



4.5. Enter the Post Number, as supplied in the email notification, into the **Post/Sequence** field and press either the [Tab] or [Enter] key.

4.6. Enter the Sequence number into the next field and again press the [Tab] or [Enter] key.

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4.7. Continue to press either the [Tab] or [Enter] key until all the fields have been populated across the screen:

| Post/Sequence | Post Title | Department | Post Type  | Planned Start Date | Planned End Date |
|---------------|------------|------------|------------|--------------------|------------------|
| 228803        | TECHNICIAN | ZW         | FIXED TERM | 13-JUL-2015        | 12-JUL-2017      |

4.8. Check that all the details are correct and click . A confirmation message will appear, click OK to confirm.

## 5. Manually attach an applicant

### CorePersonnel > Recruitment > Recruitment Maintenance > Applicant Detail

| Applicant No | Name            | Personnel No | Applicant Type | Address            | Home Phone   | Mobile Phone | Email Address |
|--------------|-----------------|--------------|----------------|--------------------|--------------|--------------|---------------|
| A163649      | Beaumonte Giles |              | EXTERNAL       | High Street Oxford | 01865 123456 |              |               |

5.1. Complete search criteria as required and click to find the relevant applicant.

5.2. Double click to select the applicant.

5.3. Go to Select Detail > Vacancy Detail.

- 1 - Personal Detail
- 2 - Vacancy Detail
- 3 - Applicant Status
- 4 - Assessment Detail
- 5 - User Defined
- 6 - Events

The *Applicant Maintenance* window opens:

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| Application | Vacancy ID | Location   | Applicant Status |
|-------------|------------|------------|------------------|
| Detail      | 118933     | Technician | SHL Shortlisted  |
| Detail      |            |            |                  |
| Detail      |            |            |                  |

5.4. Click the icon on the toolbar to add a new row.

5.5. Select the relevant vacancy from the list of values in the Vacancy ID field (scroll across to the right to see the Vacancy ID) and click

5.6. Click to link the applicant to the vacancy and out of the record as required.

## 6. Update applicant status

### CorePersonnel > Recruitment > Recruitment Maintenance > Applicant Status

| Applicant | Name               | Overall Score | Type     | Applicant Status           | Comments | Status Date | Interview Date |
|-----------|--------------------|---------------|----------|----------------------------|----------|-------------|----------------|
| A163649   | Beaumont Giles     |               | EXTERNAL | Shortlisted                |          | 03-AUG-2015 |                |
| A163636   | CLARENDON JAMIE    |               | EXTERNAL | Offer Accepted - Personnel |          | 31-JUL-2015 |                |
| A163650   | Cornmarket Melanie |               | EXTERNAL | Shortlisted                |          | 03-AUG-2015 |                |
| A163648   | Wallton Louise     |               | EXTERNAL | Offer Made - Personnel     |          | 07-AUG-2015 |                |

6.1. Enter the relevant **Vacancy ID** and click to show the applicants.

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6.2. Click on the relevant Applicant ID to select the applicant, then select the correct applicant status e.g. **Rejected at Shortlisting** from the drop down list.

6.3. Click  and .  out of the record as required.

## 7. End appointment

7.1. Refer to ORG EA1 Ending appointment(s) entering the details as shown below:

7.2. Complete details as relevant:

| Field Name (* mandatory)   | Description  |
|----------------------------|--|
| Effective Date *           | If the new starter did not show: <b>Same as start date.</b><br>If the new starter stayed less than 6 months: <b>Last paid/working day</b>          |
| Leaving Code *             | If the new starter did not show: <b>Other</b><br>If the new starter stayed less than 6 months: <b>Probation: Dismissal/Resignation</b> as relevant |
| Leaving Destination Code * | If the new starter did not show: Select <b>Not Applicable</b><br>If the new starter stayed less than 6 months: <b>Select relevant code</b>         |
| Location after leaving*    | If the new starter did not show: Select <b>Information Refused</b><br>If the new starter stayed less than 6 months: <b>Select relevant code</b>    |
| Ending Reason *            | If the new starter did not show enter <b>Didn't show</b><br>If the new starter stayed less than 6 months: <b>Enter appropriate details</b>         |

## C. Correcting vacancy errors

### Scenarios

## Scenario 7: Direct appointment, but post/appointment has been linked to a vacancy

A direct appointment does not need the vacancy created by the Reward Team to be used, so it can be closed. However, if it is wrongly linked it is important to unlink the appointment and vacancy before proceeding:

- Unlink the post/planned appointment from the vacancy Section B:1
- Close the vacancy Section B:2

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## Scenario 8: Assigned wrong post/planned appointment to a vacancy

Occasionally a post/planned appointment can be linked to the wrong vacancy. To address this you must:

- Unlink the incorrect post/planned appointment from the vacancy Section B:1
- Link the correct post/planned appointment to the vacancy Section B:4

## D. Offer issues

### Scenarios

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#### Scenario 9: Recorded offer against wrong applicant or for wrong post (not appointed yet)

Where an offer has been recorded for the wrong applicant, or against the wrong post, the status must be updated for the incorrect applicant or post before the offer can be recorded for the correct applicant.

Following the guidance in **section B:6** complete the steps below:

- Update the applicant status against the wrong applicant/post
- Update the applicant status for the correct applicant/post

You are now able to proceed with the usual steps to record the offer and appoint the correct applicant following **QRG: REC03 Managing online applicants**

## Scenario 10: Offer rejected by preferred candidate, now want to offer to second choice

Where an applicant rejects an offer (before appointment has been made) their status must be updated, and the status of the second choice similarly updated. Follow the steps below:

- Update the applicant status to "Offer rejected" Section B:6

You are now able to proceed with the usual steps to record the offer and appoint the second choice applicant following **QRG: REC03 Managing online applicants**

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## E. Appointment issues

### Scenarios

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#### Scenario 11: Appointed wrong applicant to a post

Where a wrong (unsuccessful) applicant has been appointed to a post the following steps should be taken:

- End the original appointment Section B:7
- Contact the Reward Team for a new planned appointment
- Link the new post/planned appointment to the vacancy Section B:4
- Update the status of 'wrong' applicant (if possible) Section B:6

You are now able to proceed with the usual steps to record the offer and appoint the correct applicant following **QRG: REC03 Managing online applicants**

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#### Scenario 12: Applicant Appointed to wrong Post/Appointment

Where the correct, successful, applicant has been appointed in Personnel but to the wrong post, the steps required to correct it will be dependent upon the individual circumstances.

Contact the HRIS Support Centre for guidance.

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## **Scenario 13: Applicant is linked to the wrong employee**

During the appointment process if an applicant is accidentally linked to the wrong employee the steps required to correct it will be dependent upon the individual circumstances.

Contact the HRIS Support Centre for guidance.

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## **Scenario 14: New starter didn't show and plan to re-advertise for same post**

This is managed as follows:

- End the used appointment following the steps in Section B:7
  - Raise a staff request for a replacement/refill following **QRG: RQ1 Creating and approving a staff request**
  - Follow the standard recruitment steps in **QRG: REC03 Managing online applications**
- 

## **Scenario 15: New starter didn't show, so wish to make offer to second choice**

This is managed as follows:

- End the used appointment following the steps in Section B:7
- Raise a staff request for a replacement/refill following **QRG: RQ1 Creating and approving a staff request**
- Follow the standard recruitment steps in **QRG: REC03 Managing online applications**