

Introduction

This guide relates to stages **REC 6-8** of the recruitment process outlined in the [Recruitment Statuses and Events diagram](#).

What's changed?

This guidance has been created following the move of the Recruitment functionality from Back Office to Portal in February 2020.

For further guidance on recruiting staff, please see the [HR Systems webpages](#).

This guide covers the following process steps:

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Note: Any document templates with a prefix of 'BO' are templates for letters and forms which must be generated in the Back Office (not the Portal).

1. Forms

We can create forms in CoreHR that will merge key fields from the vacancy, eg the applicants' names, and the vacancy ID etc.

The most common form used in recruitment is the shortlisting form. These forms must be created in the back office of CoreHR in the e-Recruitment module.

Shortlist Form

You will create the merged application PDF pack for the shortlisting panel in the Core Portal.



Refer to **Selecting candidates – shortlisting packs and priority candidate screening** how to guide for guidance on creating shortlisting packs.

Once created, you will need to create the shortlisting decision form for the panel to complete.

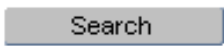
The shortlisting form is used to record whether each applicant has met the essential and desirable criteria listed in the Job Description document attached to the vacancy, this will determine who will be interviewed.

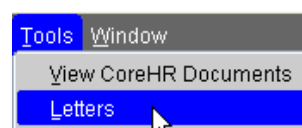
The shortlisting form is a Word document. There are two types:

- A. 'BO_Shortlist Form Standard' will allow you to score 7 essential and 7 desirable criteria
- B. 'BO_Shortlist Form Extended' is 14 essential and 14 desirable criteria

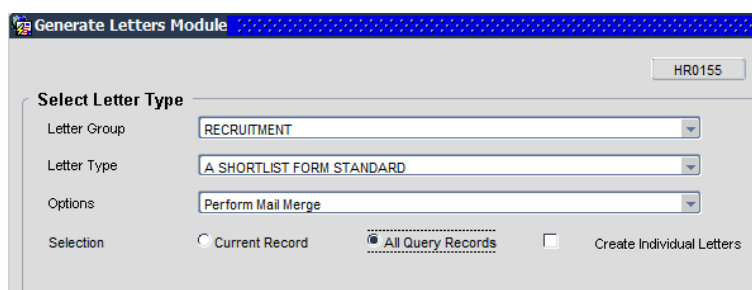
Generate the shortlist form

Core Portal > Quick jump > Back office > CorePersonnel > Recruitment > Recruitment Maintenance > Applicant Status

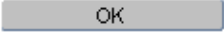
1. The *Vacancy* screen will open. In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant **Applicant Status** from the drop down eg. *Applied* to show the applicants you want included in the shortlisting form.
3. Click the  button. A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu.



5. The *Generate Letters Module* dialogue box will appear:

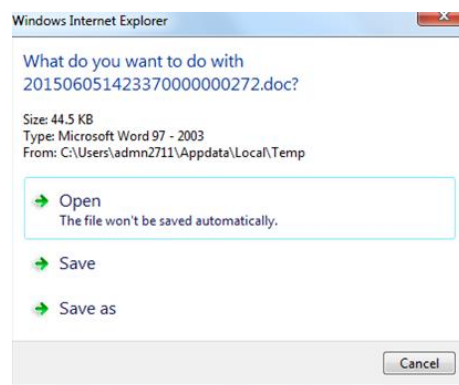


6. Select Letter Group: Recruitment
7. Select the *Letter Type* A Shortlist Form Standard or B Shortlist Form Extended.
8. Options will default to 'Perform Mail Merge' and must not be changed
9. Ensure the *Selection* option is set to **All Query Records**.

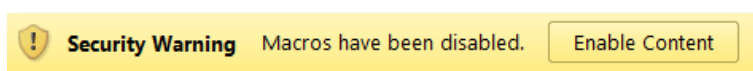
10. Click the  button.

11. Choose 'Open' for prompts to appear

12. If you can't see the prompt questions, minimise all screens to find prompt box



13. If the message below appears at the top of the page click on Enable Content



14. The shortlisting document should now contain the applicant information.

15. In the new document enter the selection criteria from the job description under the 'Essential' and 'Desirable' column headings.

16. Save and distribute the form as required.

17. Close Word and return to Core.



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

Note: At this stage you should change the status of the vacancy to *Shortlisting*.



Once shortlisting has been completed and the panel has reported back with their decisions you should change the status of the relevant applicants to *Shortlisted* or *Rejected after Shortlisting*.



See **Recruitment types, statuses and events** how to guide for further details on updating statuses.

2. Letters

Once you have scheduled your interviews, you now need to inform your applicants if they are progressing to interview or not. In CoreHR you can create letters or send emails to applicants.



See [Create and track applicant emails](#) how to guide for creating interview invitations and applicant rejection emails in Core Portal.



See [Selecting candidates – interview preparation](#) for guidance on how to schedule interviews in Core Portal.

Invite to Interview

The following guidance focuses on the system steps for generating letters to invite your shortlisted candidates to interview.


The system steps are the same should you wish to send a letter rejecting a candidate at this stage. There are several rejection letters to select from on those occasions two examples are:

- A. 'BO_Rejection After Shortlisting no feedback'
- B. 'BO_Rejection After Shortlisting feedback'

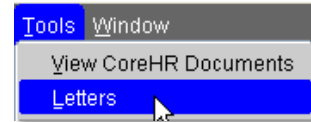
The letter including feedback has a line stating that if they wish to receive specific feedback on their application they need to contact the recruitment team.

Generate interview invite letters

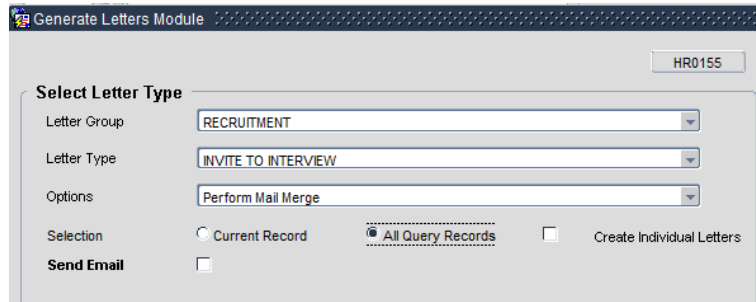
Core Portal > Quick jump > Back office > CorePersonnel > Recruitment > Recruitment Maintenance > Applicant Status

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  button. A list of relevant applicants will be displayed.

4. Select **Tools > Letters** from the menu.



5. The *Generate Letters Module* dialogue box will appear:



6. Update as follows:

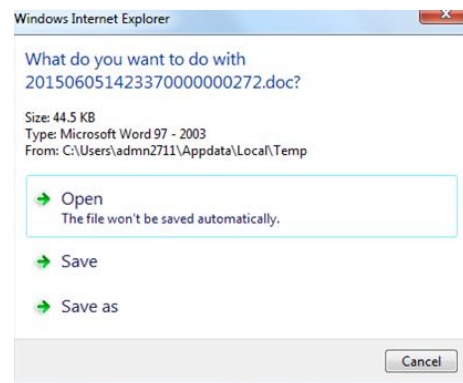
- a. Letter Group: Recruitment (default)
- b. Select the Letter Type: Invite to Interview
- c. Options will default to 'Perform Mail Merge' and must not be changed
- d. Ensure the Selection option is set to All Query Records.
- e. Ensure the Send Email field is unchecked.

7. Click the  button.

8. A new pop up window will open.

9. Choose 'Open' for prompts to appear

10. If you can't see the prompt questions, minimise all screens to find prompt box

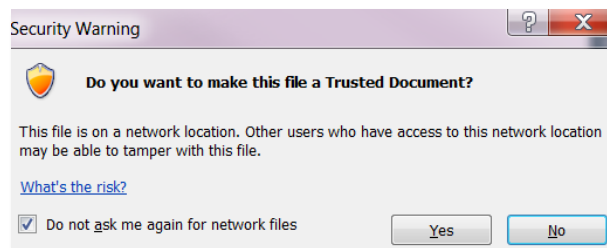


11. If the message below appears at the top of the page click on **Enable Content**.



Note: The message will also appear if you re-open the document. Either click on '**Enable Content**' or the 'x' on the right-hand side which will ensure that the macro will not re-run as it has now been disabled.

12. If you receive the message below, select 'No'.



13. Enter the relevant details for each prompt. **NB:** some prompts are repeated for each applicant. You will need to answer each of these in turn for each applicant you are generating a letter for.

14. If required amend the text.

15. Save, print and post the letter as required.

16. Save the document in a secure location as a .doc or .docx file and Exit to return to CoreHR.

17. Close the window in your browser.

18. If the document is saved as a .docx you will not see the above Security Warning when reopening a saved document.

19. Click **Yes** to the confirmation message. This will generate a record in the letter history screen.



Note: 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 **Recruitment types, statuses and events** for further details).

If you are holding 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*.