How-To Guide

Manage unplanned recruitment events

University HUMAN RESOURCES · UNIVERSITY OF OXFORD

Occasionally, recruitment events do not go to plan, and changes need to be made in CoreHR to reflect this. This guide covers the most common scenarios, with a system steps summary/overview for each of these events. The **Scenarios** matrices (pages 2-6) also cover:

- High-level instructions on what steps needs to be taken (overall process).
- References to guidance in other HRIS materials, where needed.

There are links throughout this guide, to sections within it or to the relevant guidance on the University web pages. We recommend that you:
- review the scenario examples;
- locate your scenario; and
- read the details carefully to ensure that you then follow the correct guidance.

This guide covers the following process steps:

1. Scenarios

Vacancy and applicant offer

Scenario	System steps

Extend advertising duration *Where a vacancy is currently being advertised (on the University's website, or the Internal Jobs board, and possibly other locations) and you want to extend the deadline.* ⚠️	1. Notify the Adverts team – adverts@admin.ox.ac.uk
	2. For the University website: update the **Closing Date** field under **External** with the new date
	   For the Internal Jobs board: update the **Closing Date** field under **Internal** with the new date
	3. Update the **Closing Date** field under **Recruitment** to match the new date
	4. Add the following text to the top of the advert text in capital letters:
	   PLEASE NOTE THAT THE CLOSING DATE FOR THIS VACANCY HAS BEEN EXTENDED TO XXXXX
	5. Notify applicants who have already submitted their applications
	6. Update any external adverts (eg Jobs.ac.uk), as required
	Note Any changes made to vacancies already approved by the Adverts team must be communicated to the Adverts team.

Remove live advert *Where a vacancy is currently being advertised and you want to remove it.* ⚠️	1. Notify the Adverts team – adverts@admin.ox.ac.uk 2. For the University website: update the **Closing Date** field under **External** with **yesterday's date** For the Internal Jobs board: update the **Closing Date** field under **Internal** with **yesterday's date** 3. Update the **Closing Date** field under **Recruitment** to match, ie **yesterday's date** 4. Notify applicants who have already submitted their applications 5. Update any external adverts (eg Jobs.ac.uk) **Note** Any changes made to vacancies approved by the Adverts team must be communicated to the Adverts team.
Applicant is unable to apply online *There are many reasons why someone may be unable to apply online, for example, technical issues, missed the deadline etc.*	The system steps will depend upon the individual circumstances. You should contact HRIS Support for guidance. One option would be for the applicant to complete a paper application, which is then recorded in CoreHR. See: **Add a manual application** guide.
Withdraw before deadline *Applicant wishes to withdraw their application.*	The system steps will depend upon the individual circumstances. You should contact HRIS Support for guidance.

Scenario	System steps
Withdraw after deadline *Applicant wishes to withdraw their application.*	Change their applicant status to 'Withdrawn' - follow the **Manage Recruitment statuses and events** guide to see how to update the applicant status.
Add document to submitted application *If you wish to add a new document (eg CV) to a submitted application.* ⚠️	To attach a new document to a submitted application, follow the **Add attachments to applications** section in the **Generate shortlisting packs and screen applicants** guide. **Note** All documents manually attached to an application will be visible to the applicant through the applicant portal. Therefore, **do not upload confidential documents** that you do not wish to share with applicants, such as references. If you require further advice and support, contact HRIS Support.
Document is causing an error when generating an application *(ie merge application and attached documents)*	In all cases contact HRIS Support.
Re-advertise for same post *When a recruitment exercise fails to lead to an appointment, and you want to re-advertise with the same attributes.*	1. Ensure all applicant statuses are correctly recorded in CoreHR - follow the **Manage Recruitment statuses and events** guide to see how to update the applicant statuses. 2. Unlink appointment from vacancy. 3. Change Vacancy Status to 'No appointment made' and close the vacancy - follow the **Close a vacancy** guide. 4. Create a new manual vacancy for advertising. 5. Link original appointment to new vacancy. 6. Forward original 'Post/Appointment now authorised' email to the Adverts Team (adverts@admin.ox.ac.uk), confirming the new vacancy number and that it is ready to advertise.
Re-advertise at a different grade *When a recruitment exercise fails to lead to an appointment, the decision is made to adjust the duties of the position and advertise at a different grade.*	1. Ensure all applicant statuses are correctly recorded in CoreHR - follow the **Manage Recruitment statuses and events** guide to see how to update the applicant statuses. 2. Unlink appointment from vacancy. 3. Change Vacancy Status to 'No appointment made' and close the vacancy - follow the **Close a vacancy** guide. 4. Email Reward team to confirm that the original post should be made dormant (reward@admin.ox.ac.uk) 5. Raise a new staff request and start the recruitment process anew - use **Create and approve staff requests** guide.
Failed recruitment – advertising not being repeated *When a recruitment exercise fails to lead to an appointment and the decision is made not to re-advertise.*	1. Ensure all applicant statuses are correctly recorded in CoreHR - follow the **Manage Recruitment statuses and events** guide to see how to update the applicant statuses. 2. Change Vacancy Status to 'No appointment made' and close the vacancy, follow the **Close a vacancy** guide.

Scenario	System steps
Offer rejected by preferred candidate, now want to offer to standby candidate *When your preferred candidate rejects your offer (which you have recorded) and the decision is made to make an offer to your standby candidate.*	1. Update the applicant status against the original preferred applicant to 'Offer Refused' - follow the **Manage Recruitment statuses and events** guide. 2. Record new offer against the standby applicant. Follow the **Manage a successful applicant** guide in full to ensure all steps are covered for this new successful applicant.
Appoint applicant from a different vacancy *When a recruitment exercise fails to lead to an appointment and the decision is made to appoint someone who applied for a different vacancy (to which you have access).*	1. Ensure all applicant statuses are correctly recorded in CoreHR - follow the **Manage Recruitment statuses and events** guide to see how to update the applicant statuses. 2. [Attach applicant from alternative vacancy](#). 3. Record new offer against the standby applicant. Follow the **Manage a successful applicant** guide in full to ensure all steps are covered for this new successful applicant.
Make a direct appointment *When a recruitment exercise fails to lead to an appointment and the decision is made to make a direct appointment (ie the new starter did not apply via the applicant portal).*	1. [Unlink the planned appointment from the vacancy](#). 2. Change Vacancy Status to 'No appointment made' and close the vacancy - follow the **Close a vacancy** guide. 3. Check the guidance and identify the correct appointing route by following the **Appointing: where to start in CoreHR and background information** guide.

New Starter did not show

Scenario	System steps
New starter did not show and plan to re-advertise to the same appointment *This is where the new starter's record has been created in People Management, they have declined the job and the decision has been made to re-advertise with the same attributes.*	Follow the steps listed but note some of the steps take place in People Management. 1. End the appointment against the employee's record and update leaving fields accordingly. 2. Raise a new staff request and start the recruitment process anew, use **Create and approve staff requests** guide.
New starter did not show, so wish to make offer to standby candidate *This is where the new starter's record has been created in People Management, they have declined the job and the decision has been made to make an offer to the standby candidate.*	Follow the steps listed but note some of the steps take place in People Management. 1. End the appointment against the employee's record and update leaving fields accordingly. 2. Raise a staff request for a replacement / refill (to request a new planned appointment) use **Create and approve staff requests** guide. 3. Update the applicant status against the original preferred applicant to 'Offer Refused', follow the **Manage Recruitment statuses and events** guide. 4. Link new planned appointment to original vacancy. 5. Record new offer against the standby applicant. Follow the **Manage a successful applicant** guide in full to ensure all steps are covered for this new successful applicant.

Corrections

Scenario	System steps
Recorded offer against wrong applicant (not appointed) *Where the offer has been recorded against the wrong applicant and the incorrect new starter's record has not been created in People Management.*	1. Update the applicant status against the incorrect applicant to 'Offer Refused', follow the **Manage Recruitment statuses and events** guide. 2. Record new offer against the correct applicant. Follow the **Manage a successful applicant** guide in full to ensure all steps are covered for this new successful applicant.
Recorded offer against wrong applicant (appointed) *Where the offer has been recorded against the wrong applicant and the incorrect new starter's record has been created in People Management.*	Follow the steps listed but note some of the steps take place in People Management. 1. End the appointment against the employee's record and update leaving fields accordingly. 2. Request new planned appointment from the Reward team (reward@admin.ox.ac.uk) 3. Update the applicant status against the incorrect applicant to 'Offer Refused', follow the **Manage Recruitment statuses and events** guide. 4. Link new planned appointment to the vacancy. 5. Record new offer against the correct applicant using new planned appointment. Follow the **Manage a successful applicant** guide in full to ensure all steps are covered for this new successful applicant.
Recorded offer using the wrong post (not appointed) *Where the wrong appointment was used, and the offer has been recorded and the incorrect new starter's record has not been created in People Management.*	1. Update the applicant status to 'Offer Refused' - follow the **Manage Recruitment statuses and events** guide. 2. Unlink the planned appointment from the vacancy. 3. Link the correct appointment to the vacancy. 4. Record new offer against the successful applicant. Follow the **Manage a successful applicant** guide in full to ensure all steps are covered for this new successful applicant.
Recorded offer using the wrong post (appointed) *Where the wrong appointment was used, and the offer has been recorded and the incorrect new starter's record has been created in People Management.*	The system steps will depend upon the individual circumstances. Contact HRIS Support for guidance.
Change a recorded offer (not appointed) *If you have recorded an offer (made or accepted) and you need to change something on the appointing wizard. For example, you need to update the salary point.*	Follow the **Offer changes or corrections** section in the **Manage a successful applicant** guide.

Scenario	System steps
Applicant is linked to the wrong employee *During the appointment process if an applicant is accidently linked to the wrong employee.*	The system steps will depend upon the individual circumstances, contact HRIS Support for guidance.
Direct appointment, but appointment has been linked to a vacancy *When a new starter is a direct appointment, but the planned appointment has been linked to the vacancy (which was never advertised). You will not be able to appoint until it has been unlinked from the vacancy.*	1. Unlink the planned appointment from the vacancy. 2. Change Vacancy Status to 'No appointment made' and close the vacancy, follow the **Close a vacancy** guide. 3. Follow the New Starter route of **Appoint successful applicants and new starters** guide.
Assigned wrong planned appointment to a vacancy *Where an incorrect planned appointment has been linked to a vacancy and needs to be unlinked.*	1. Unlink the incorrect planned appointment from the vacancy. 2. Link the correct appointment to the vacancy.

2. CoreHR process steps

Unlink planned appointment from vacancy

> Core Portal > Employee Dashboard > Recruitment > Vacancies > Search for your Vacancy > Actions > Edit Vacancy

1. From **Vacancy Details – 1** select the **ACTIONS** button top right corner.
2. Select **Linked Appointments**. The Linked Appointments screen will open.
3. Click **REMOVE** next to the listed appointment.
4. Click **YES** to the warning message.
5. A success message appears - wait for the dark green line to fill.
6. To exit, click on the white back arrow, next to the title **Recruitment**.

Link planned appointment to vacancy

> Core Portal > Employee Dashboard > Recruitment > Vacancies > Search for your Vacancy > Actions > Edit Vacancy

1. From **Vacancy Details – 1** select the **ACTIONS** button top right corner.
2. Select **Linked Appointments**. The Linked Appointments screen will open.
3. Start to type the post number into the **Post** field, select the correct post from the options listed.
4. Select the correct sequence number from the drop-down in the **Sequence** field.

> ⚠️ **Note** If you are not able to find your post contact HRIS Support.

5. Click the blue **ADD** button.
6. A green success message appears - wait for the dark green line to fill.
7. The post will be listed as linked.

8. To exit, click on the white back arrow, next to the title **Recruitment**.

Create new manual vacancy

Core Portal > Employee Dashboard > Recruitment > Vacancies

1. Click on the **ADD VACANCY** button.
2. Fields marked with an asterisk are mandatory.
3. In the **Description** enter the actual job title (in title case), which will be used on the vacancy.
4. Select the appropriate **department** to match the post.
5. Enter **today's date** in the **Opening Date** field. You can use the calendar for this or type the date as seen.
6. Click **OK**.
7. The new vacancy will open. Update the fields ready for advertising; refer to the **Prepare a vacancy for advertising** guide.

Add Vacancy

Description *
HR Assistant

Department
Mathematical Institute

Opening Date *
02-Sep-2020

Closing Date

CANCEL   OK

⚠ **Note** As you are creating a new vacancy, details will not transfer from an existing staff request. You must select values in all the necessary fields to match the post.

8. Note the vacancy number displayed in the title for future reference.

Vacancy Details 145904 - HR Assistant
Recruitment ＞ Vacancy Details: 145904 - HR Assistant

Manually attach applicant to a vacancy

Where an applicant has applied for one vacancy and you want to attach them to a different vacancy as well.

Core Portal > Employee Dashboard > Recruitment > Applicant Detail

1. Click **VIEW ALL**.
2. Search for your applicant using their name.
3. Once you have located your applicant, click the ellipsis (three dots).
4. Select **View Details** to open the **Applicant Details** screen.
5. Select **Vacancy Detail** in the left-side menu.
6. Click **ADD TO VACANCY -** this opens a small window.
7. Enter the vacancy ID for the vacancy to which you want to add the applicant. Be sure this is the correct vacancy before proceeding.
8. Click **OK**.
9. A green success message appears - wait for the dark green line to fill.
10. To exit, click on the white back arrow, next to the title **Recruitment**.

End appointment on employee's record

The following needs to be recorded on the employee's record in People Management of CoreHR. Refer to the **End appointment(s)** guide, entering the details as shown below:

Field Name (* mandatory)	Description
Leaving Date *	If the new starter did not show: **Same as start date** If the new starter stayed less than 6 months: **Last paid/working day**
End all Contracts	If the new starter is leaving all appointments within **your** department, slide the toggle across.
Leaving Code *	If the new starter did not show: **Other** If the new starter stayed less than 6 months: **Probation: Dismissal/Resignation, as relevant**
Leaving Destination *	If the new starter did not show: **Select Not Applicable** If the new starter stayed less than 6 months: **Select relevant code**
Location after Leaving *	If the new starter did not show: **Select Information Refused** If the new starter stayed less than 6 months: **Select relevant code**
Comments *	If the new starter did not show enter **Did not show** If the new starter stayed less than 6 months: **Enter appropriate details**