



## HRIS: Offering Employment- successful and non-successful candidates



Some of the final systems steps to be completed at the end of the selection process, including offering to the successful applicant and managing unsuccessful candidates.

- Post interview steps
- Offer made
- Referees, events, and documents

# Post interview steps

## Unsuccessful candidates

### Status update

There are three rejected statuses for unsuccessful candidates. Update the statuses of the rejected applicants that represent the stage at which they were rejected:

- *Rejected after Shortlisting*
- *Rejected after Interview 1*
- *Rejected after Interview 2*

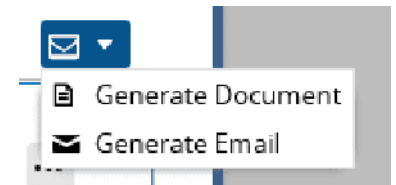
The [Recruitment Types, Statures and Events](#) guide explains how to update the applicant status either individually or in bulk.

### Status update – standby

Record *Applicant Status* as *Standby* for your second choice applicant should the preferred candidate decline their offer.

### Rejection communication

Send a rejection letter or email (with optional feedback), via the **envelope icon** on the *View Applicants* screen.



## Successful candidate

Find your preferred candidate from the *View Applicants* screen, and update their status to *Preferred Candidate*. See: REC\_00 Recruitment Basics guide.

### Applicant events

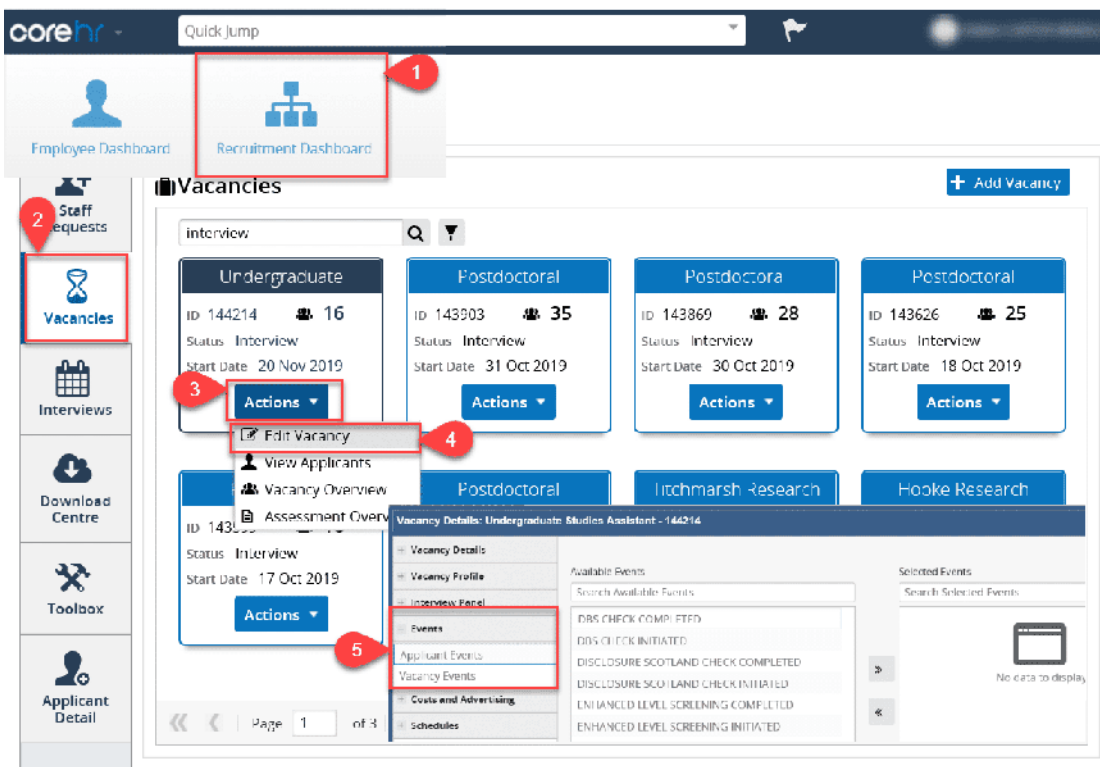
*Cascade events* to the applicant.

### Pre-employment checklist

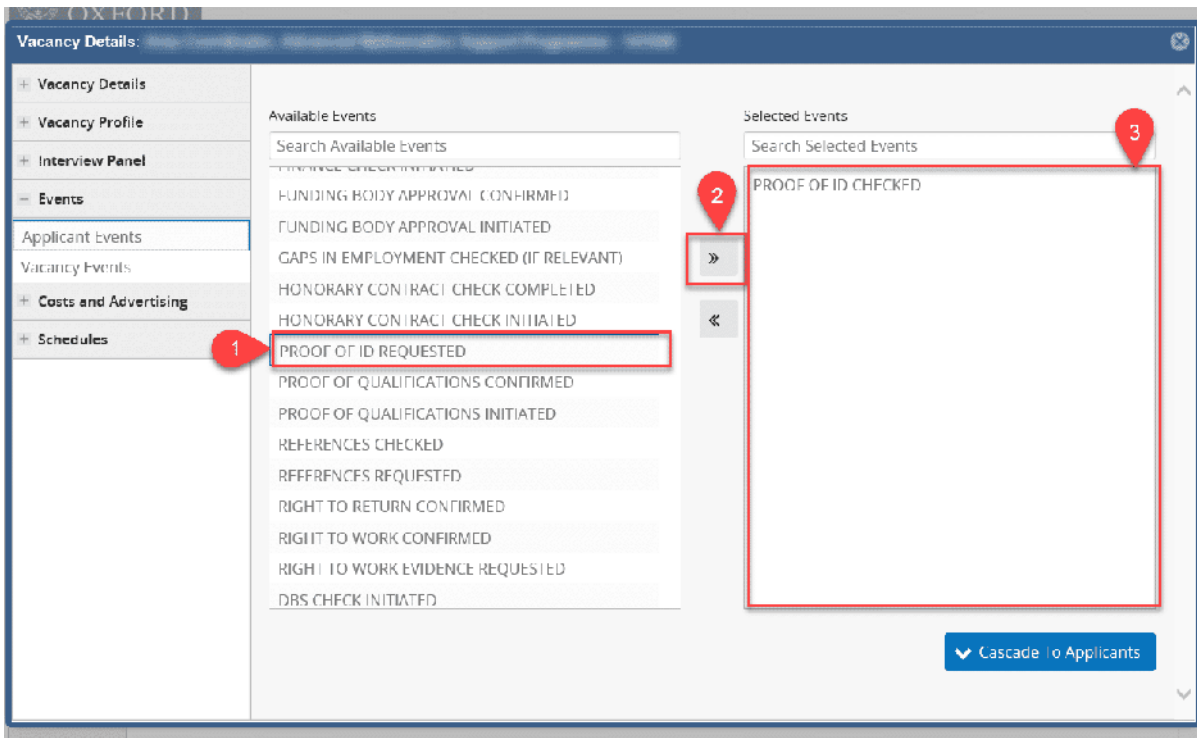
These events make a pre-employment checklist in CoreHR. This gives you a record that the pre-employment checks have taken place.

## Step 1

1. Recruitment Dashboard → Vacancies → Find your vacancy
2. Once located click on **Actions** → **Edit Vacancy**
3. Click on **Events** → **Applicant Events** 2



## Step 2 Options



Select the applicable pre-employment checks and create your own checklist for each occasion. For example, a Clinical position will require Professional Registration checks but a Receptionist position would not. To select the relevant options:

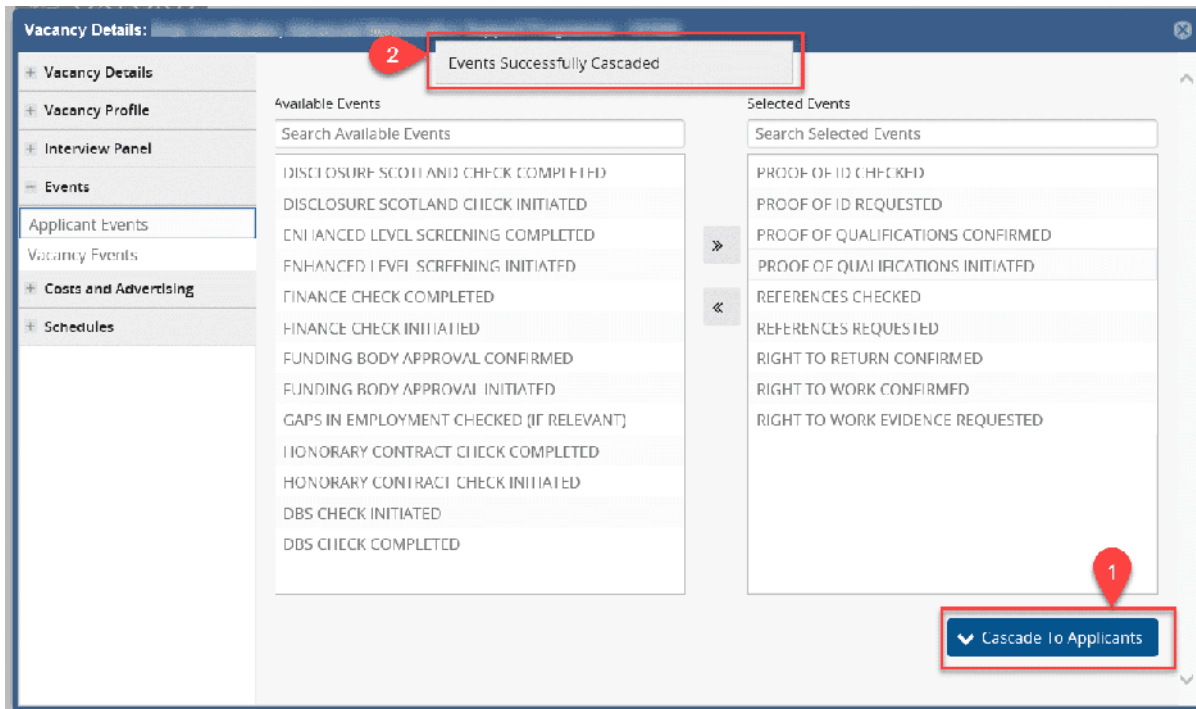
1. click on the option in the left column
2. select the arrows facing right and the option will appear in the right-hand column.

### Step 3 Confirm your checklist

Once all items are selected in the right-hand column, check they are correct.

Be sure to have both applicable checks where necessary, eg *Right to Work Evidence Requested* and *Right to Work Confirmed*.

### Step 4 Cascade

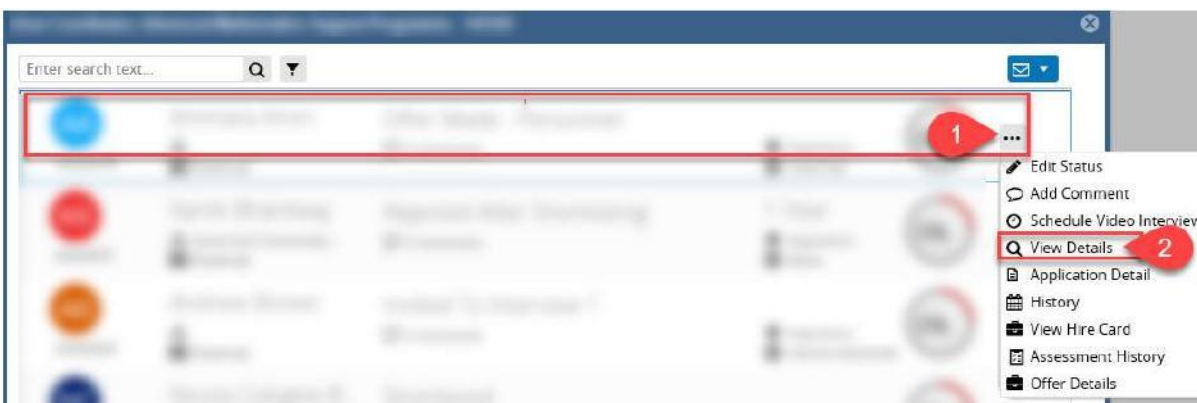


Select the **Cascade to Applicants** button to ensure the checklist of events appears in their *Applicant Details* screen. Confirmation will appear at the top of your screen.

### Step 5 View applicants

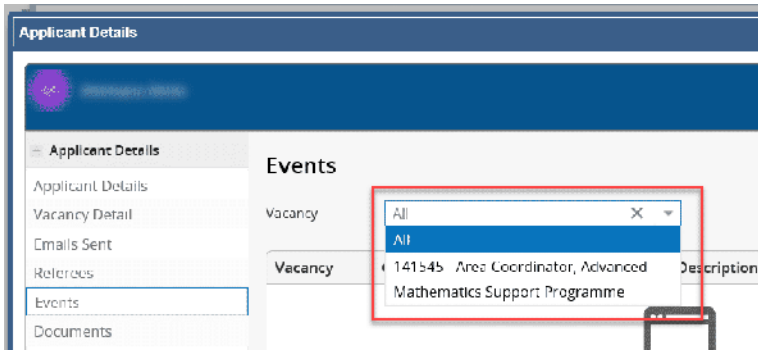
Close the window of *Vacancy Details* to return to the *Vacancy* tile. Select **Actions** and then **View Applicants**.

### Step 6 View applicant details



In the *View Applicants* screen, locate your successful candidate, select the **three dots** menu and click on **View Details**.

## Step 7 Navigate to the applicant events



Select **Events** in the left hand menu, and click on your **vacancy ID** from the drop down menu.

## Step 8 View applicant's events

View the list of applicant events that make up your checklist. Click **Edit** to record an event as complete.

## Step 9 Record as completed

Move the **toggle slider** to the right to show the event is complete. Select from the **calendar** the date you completed that task.

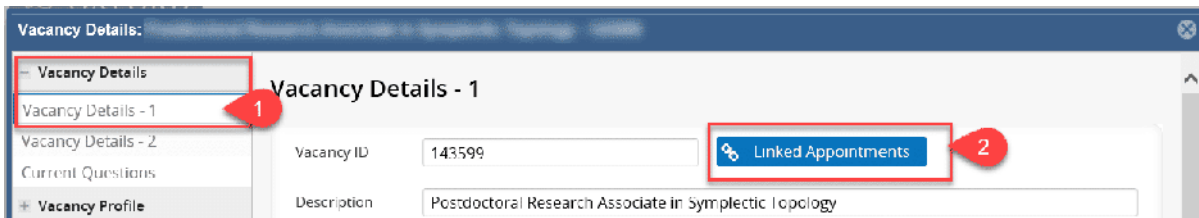
Update all tasks that you have completed with the date of completion.

## Offer made

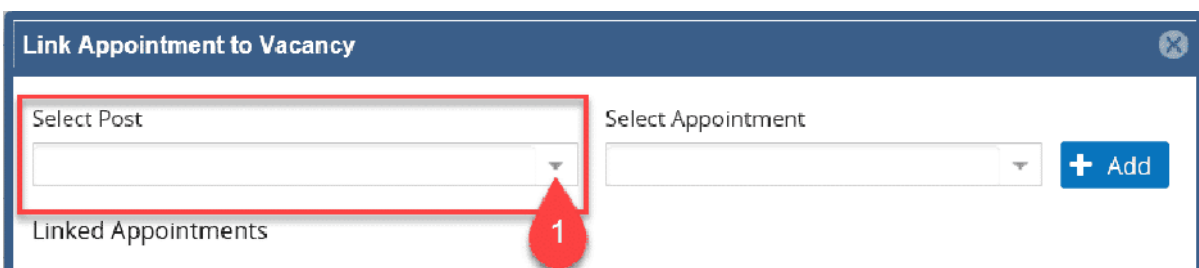
Linking appointment to vacancy: Next you need to link the appointment to the vacancy. Navigate to your vacancy and select **Edit Vacancy** from the *Actions* button.

## Step 1 Vacancy details

*Vacancy Details - 1* → *Linked Appointments*.



## Step 2



Search for the planned appointment. Find the post in the first field, and select its sequence number in the second field, *Select Appointment*.

### Step 3 Job title

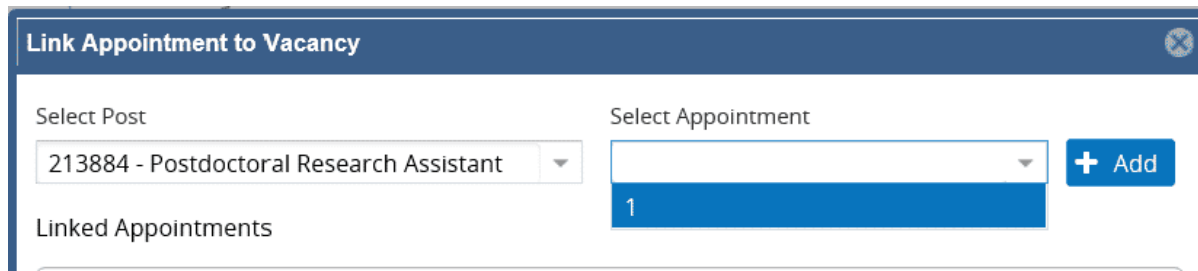
Using the drop down you can search using the job title description or enter part of the job title into the search box.

### Step 4 Post number

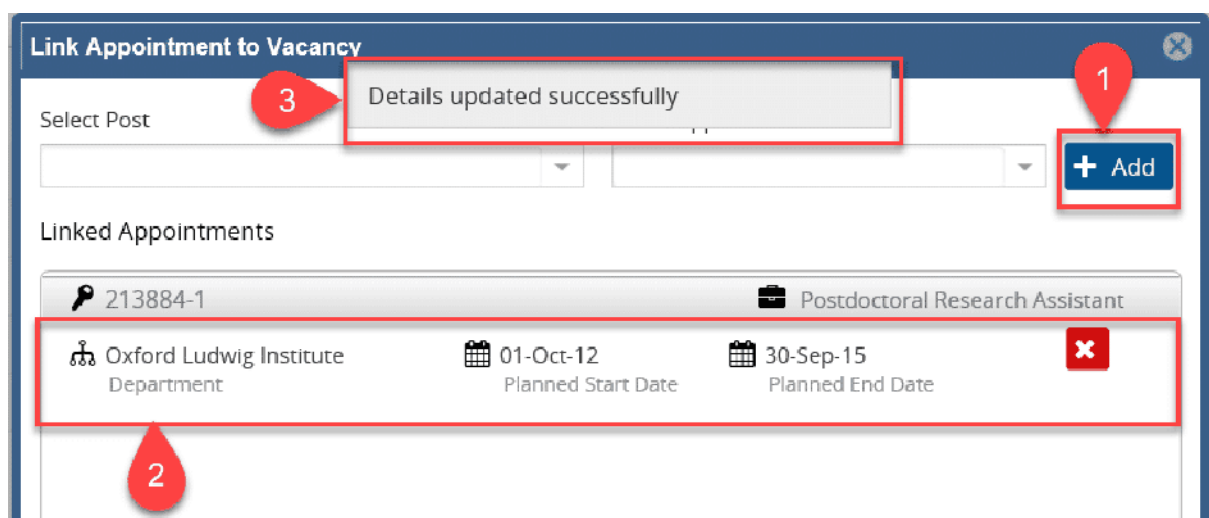
Alternatively, you can search by typing in the post number (see the email from Reward Team).

### Step 5 Sequence

Once you have found your post select the sequence number from the drop down list.



Click **Add**. The appointment will be linked, and a confirmation will pop up.

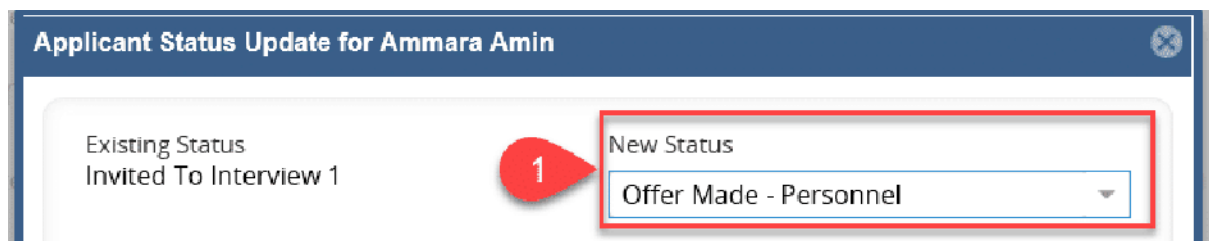


## Recording offers in CoreHR

First, update the successful candidate's status. Go to *View Applicants* screen, select the **three dots** at the end of the row of the successful candidate. Click **Edit Status**.

### Step 1 Status update

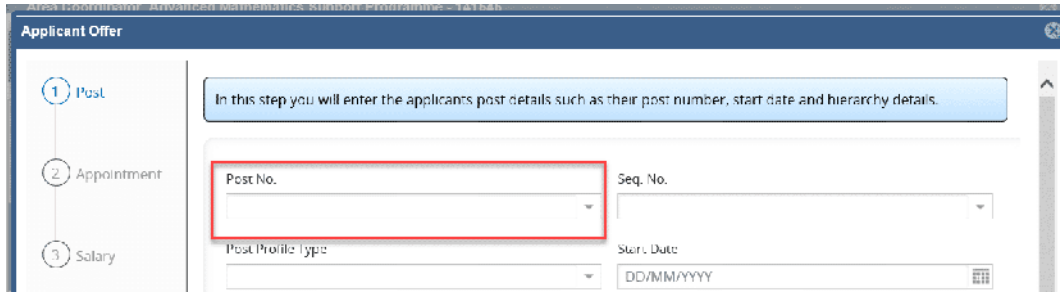
From the drop down menu select the status *Offer Made - Personnel*. If you have not linked the planned appointment to the vacancy this will not work. Click **Save**.





## Step 2 Offer details

In the *Applicant Offer* window, in Post, select the post number from the drop down list. Then select the sequence number.



The screenshot shows the 'Applicant Offer' window with a sidebar on the left containing three steps: 1. Post, 2. Appointment, and 3. Salary. The main area contains a blue instruction box: 'In this step you will enter the applicants post details such as their post number, start date and hierarchy details.' Below this are four input fields: 'Post No.' (highlighted with a red box), 'Seq. No.', 'Post Profile Type', and 'Start Date' (with a date picker set to DD/MM/YYYY).

## Step 3 Post

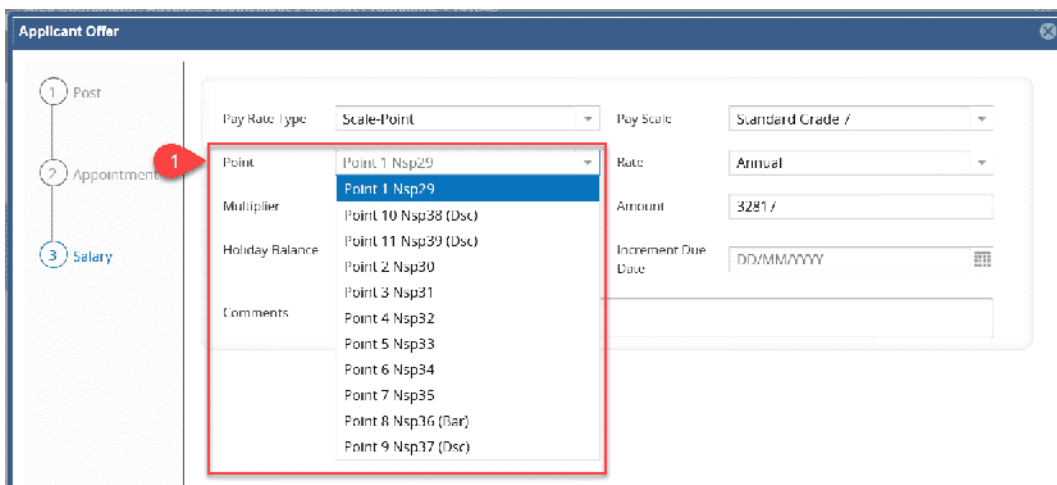
Some details are now populated from the staff request, which was created at the beginning of the process. You do not need to update any other details here - click **Next**.

## Step 4 Appointment

Details of the appointment will be displayed here, from the staff request. Simply click **Next**.

## Step 5 Salary

Update the *Salary Point* only, to match the offer made to the applicant. Select the appropriate point from the drop down list. Click **Save**.



The screenshot shows the 'Applicant Offer' window with the sidebar step 3 'Salary' highlighted. A red circle with the number '1' points to the 'Point' dropdown menu. The dropdown is open, showing a list of points from 'Point 1 Nsp29' to 'Point 9 Nsp37 (Dsc)'. Other fields visible include 'Pay Rate Type' (Scale-Point), 'Pay Scale' (Standard Grade 7), 'Rate' (Annual), 'Amount' (32817), and 'Increment Due Date' (DD/MM/YYYY).

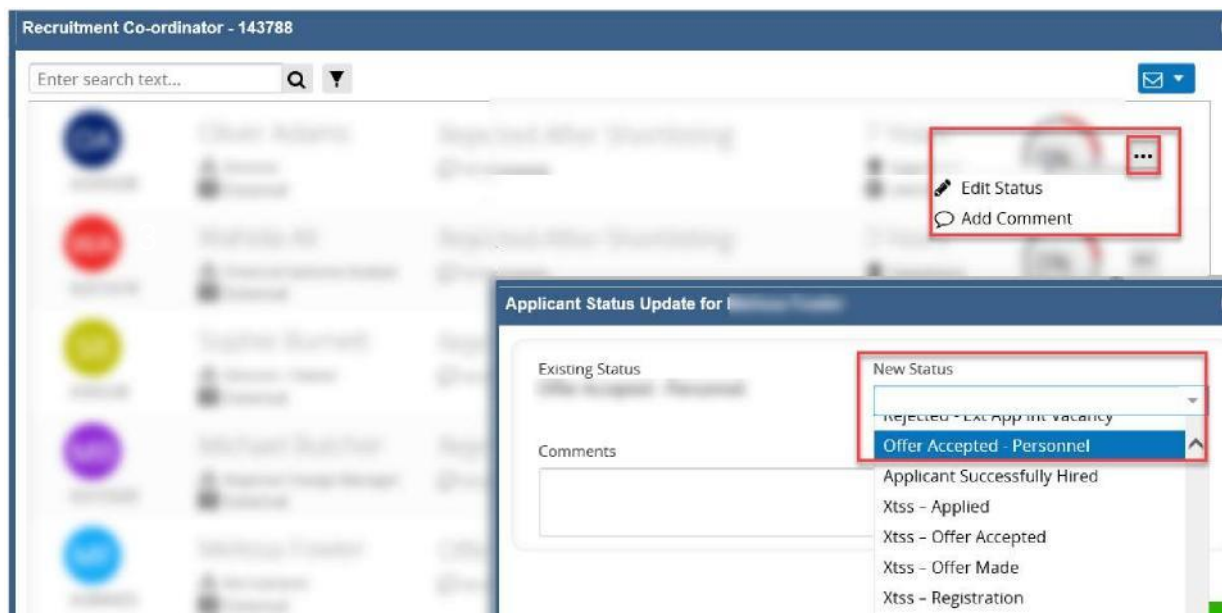
## Summary

Once saved, you will return to the *View Applicants* screen. You will see that the applicant's status has updated to *Offer Made - Personnel*. View the offer details by selecting the three dots on the relevant row, and clicking *Offer Details*.

## Offer under consideration

The successful applicant will consider the offer made and either:

1. accept the offer with no changes, a simple process to record in CoreHR; or
2. negotiate over the offer, requiring a decline to be recorded in the system; or
3. reject the offer, requiring their offer to be declined in the system and potentially a new offer being made to another candidate.



## Accepting the offer

When an applicant accepts the offer, in CoreHR, update their status to *Offer Accepted- Personnel*. Find your applicant in *View Applicants screen*, select the **three dots** menu at the end of their row and select **Edit Status**. Select the status and **Save**.

## Negotiate a new offer

If the applicant has negotiated different terms and conditions to their original offer, you need to reflect this in CoreHR.

### 1. Refuse the Offer

Update the applicant's status to *Offer Refused* and **Save**.

### 2. Offer Made - Personnel

Change their status again to *Offer Made - Personnel* and **Save**. This will launch the *Applicant Offer* screen.

### 3. Record the new offer

Record the new agreed *Salary Point* under the Salary section. **Save**.

### 4. Offer Accepted- Personnel

Update the applicant's status again to *Offer Accepted -Personnel* and **Save**.



## Offer declined

If your applicant declines the offer and no longer wishes to pursue the role you could:

- choose to offer the role to a standby; or
- you may wish to consider other options relating to this recruitment campaign.

See system guidance on this and other situations when recruiting doesn't quite go to plan: REC04\_Managing Vacancies and Appointments.

## Referees, events, and documents

**Position filled:** The applicant has accepted the position and the offer has been recorded as accepted. Now there are a few more details to finish in CoreHR before closing the vacancy.

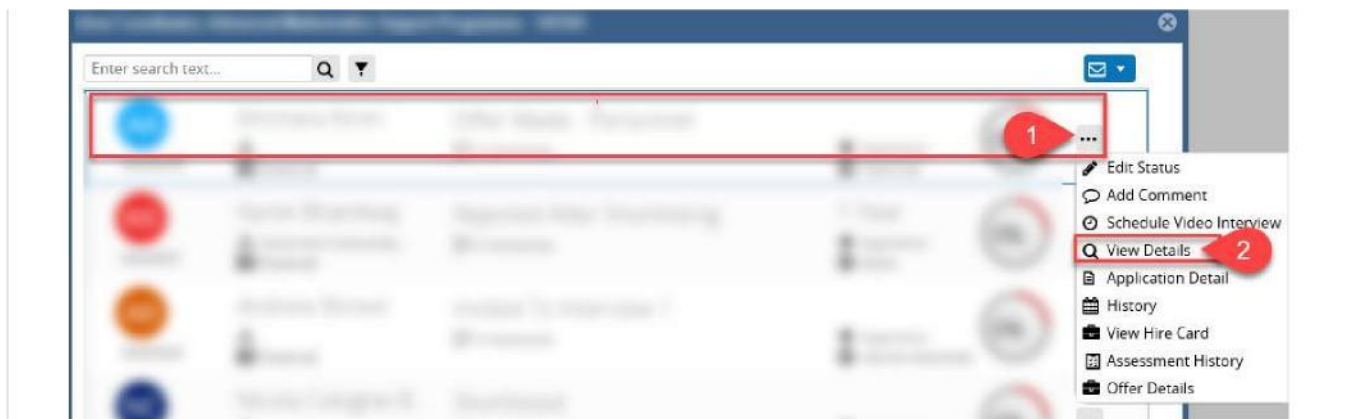
### View, edit and add referee details

At this stage you may wish to review the applicant's referee information:

## NAVIGATE

To view the applicant's referee details, open the Applicant Details screen.

1. Click **View Applicants** from the **Actions** button
2. Find the successful applicant and click on the **three dots**
3. Select **View Details** from the menu

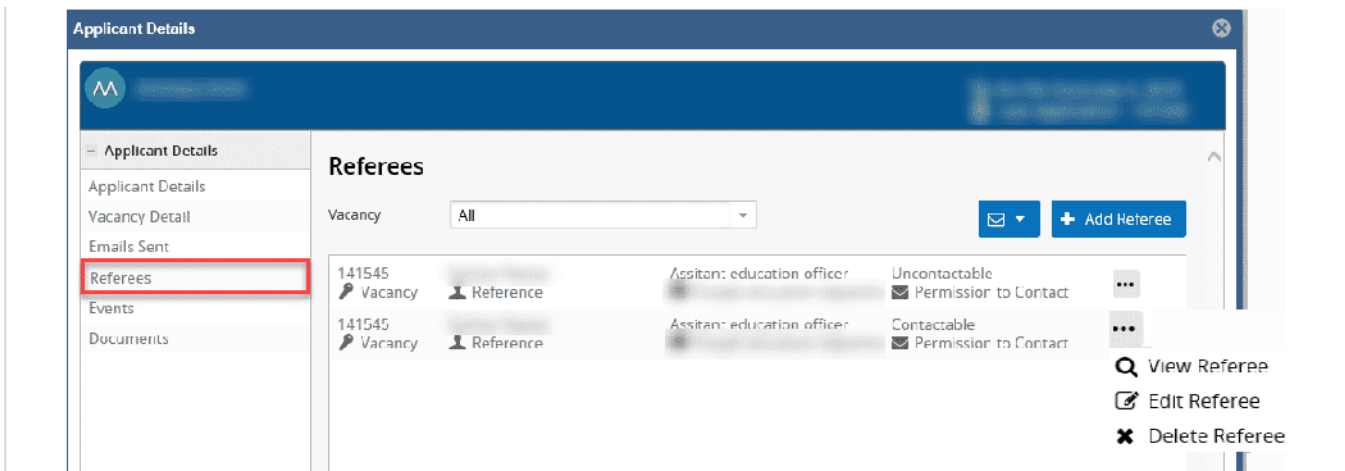


## REFEREES

Select **Referees** from the left menu. Here you will see details of the referees including:

- the vacancy they are referees for,
- their name and company name, including position held,
- and whether or not you have permission to contact them.

The three dots at the end of each row opens a menu.



## VIEW, EDIT OR DELETE

From the three dot menu you can:

- **View** information about that referee, such as their contact information.
- **Edit** the personal information and contact details for that referee.
- **Delete** the referee removing all of their information from this applicant.

## Document production

You can produce letters and forms to send out to the successful applicant such as:

- RF Conditional Offer
- RF Congregation form
- RF Data Collection form
- RF Equality and Diversity form
- RF Pre-emp Health Questionnaire
- RF University Card form

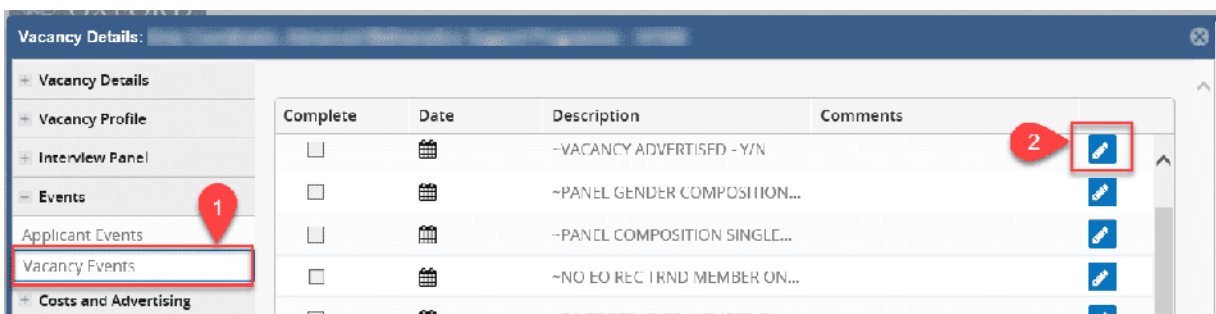
For system training steps on generating these documents open the relevant guide.

## Vacancy events

Record recruitment events at the end of the recruitment process. These are indicated in *Events* with the prefix ~

Navigate to the vacancy and select **Edit Vacancy**.

Select **Vacancy Events** under *Events*. Select the pen icon to edit.



Move the toggle slider to show complete, add the date that the task was completed and select Save.

You may wish to add comments to clarify what has been completed or to indicate 'Yes' or 'No' in relation to a task.

At the end of the Recruitment Process all of the tasks with the ~ prefix must be completed.

Complete	Date	Description	Comments
<input checked="" type="checkbox"/>	09/01/20	~VACANCY NOT ADVERTISED - R...	NA
<input checked="" type="checkbox"/>	09/01/20	~VACANCY ADVERTISED - Y/N	Yes
<input checked="" type="checkbox"/>	09/01/20	~PANEL GENDER COMPOSITION...	Yes
<input checked="" type="checkbox"/>	09/01/20	~PANEL COMPOSITION SINGLE...	N/A
<input checked="" type="checkbox"/>	09/01/20	~NO FOREIGN MEMBER ON...	N/A
<input checked="" type="checkbox"/>	09/01/20	~EO RECRUITED MEMBER ON...	Yes
<input checked="" type="checkbox"/>	09/01/20	~APPOINTEE WAS UNIVERSITY E...	No
<input checked="" type="checkbox"/>	09/01/20	~APPOINTEE WAS EXTERNAL AP...	Yes

Check the remaining tasks and update as required.

## Closing the vacancy

You must close the vacancy. Leaving the vacancy open will impact reporting and affect the speed and performance of CoreHR. See: [Closing the Vacancy how to guide](#)