

## Introduction

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.

**What's changed?**  
Scenarios related to late applicants added. **May 2020**

The Scenario matrix on page two provides a list of scenarios, it also:

- Gives high level instructions on what steps needs to be taken
- Refers you to guidance in other HRIS materials where needed
- Includes some system guidance (for certain scenarios)

We recommend that you read through the scenario examples thoroughly to ensure you are following the correct guidance.

The CoreHR system steps outlined in the guide should be completed in the Portal unless it instructs you to navigate to the Back Office.

This guide has been split into following areas:

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## A. Scenario matrix

Scenario	System steps
<b>Vacancy and applicant offers</b>	
<p><b>1. Extend advertising duration</b>  <i>Where a vacancy is currently being advertised (on the University's website and possibly other locations) and you want to extend the deadline.</i></p>	<p>a. Notify the Adverts team – <a href="mailto:adverts@admin.ox.ac.uk">adverts@admin.ox.ac.uk</a></p> <p>b. Update the <b>Publish to External Website Close on</b> field with the new date (as well as the Recruitment Closes on field)</p> <p>c. Add the following text to the top of the advert text in capitals:            PLEASE NOTE THAT THE CLOSING DATE FOR THIS VACANCY HAS BEEN EXTENDED TO XXXXX</p> <p>d. Update the text at the bottom of the advert with the revised closing date</p> <p>e. Notify applicants who have already submitted their applications</p> <p>f. Update any external adverts (e.g. Jobs.ac.uk) as required</p> <p>Note: <u>Any</u> changes made to vacancies approved by the Adverts team must be communicated to the Adverts team.</p>
<p><b>2. Remove live advert</b>  <i>Where a vacancy is currently being advertised (on the University's website and possibly other locations) and you want to remove it.</i></p>	<p>a. Notify the Adverts team – <a href="mailto:adverts@admin.ox.ac.uk">adverts@admin.ox.ac.uk</a></p> <p>a. Update the <b>Publish to External Website on</b> field with the <b>yesterday's date</b> (as well as the Recruitment Closes on field)</p> <p>b. Notify applicants who have already submitted their applications</p> <p>c. Update any external adverts (e.g. Jobs.ac.uk)</p> <p>Note: <u>Any</u> changes made to vacancies approved by the Adverts team must be communicated to the Adverts team.</p>

Scenario	System steps
<p><b>3. Applicant is unable to apply online</b>  <i>There are many reasons why someone may be unable to apply online, for example technical issues, missed the deadline etc.</i></p>	<p>The system steps will depend upon the individual circumstances, we therefore advise that you contact the HRIS Support Centre for guidance.</p> <p>One option would be for the applicant to complete a paper application, which is then recorded in CoreHR. Guidance can be found in the <a href="#">Managing Paper Applications</a> QRG.</p>
<p><b>4. Late application (on the day of the deadline)</b></p>	<p>a. Re-open the advert on the University’s website at agreed time with the applicant by updating the <b>Publish to External Website Close on time</b> field accordingly (as well as the <b>Recruitment Closes on time</b>).</p> <p>b. If you have already created the application pack, refer to step b onwards from scenario 5 for next steps.</p>
<p><b>5. Late application (any day after the deadline)</b></p>	<p>a. Ask applicant to complete manual application, see <a href="#">Managing Paper Applications</a> QRG.</p> <p>Once manual application has been received, and if application pack has been created, see steps below to include application in the application pack.</p> <p>b. Deleted merged pack.  c. Generate application for late applicant.  d. Merge all applications.</p>
<p><b>6. Withdraw application (before deadline)</b>  <i>Before the vacancy deadline, an applicant wishes to withdraw their application.</i></p>	<p>The system steps will depend upon the individual circumstances, contact the <a href="#">HRIS Support Centre</a> for guidance.</p>
<p><b>7. Withdraw application (after deadline)</b>  <i>Following the vacancy deadline, an applicant wishes to withdraw their application.</i></p>	<p>a. Change their applicant statuses to ‘Withdrawn’ (<b><a href="#">Section B6</a></b>)</p>
<p><b>8. Add document to submitted application</b></p>	<p>a. Attach applicant’s new document (<b><a href="#">Section B9</a></b>)</p>

Scenario	System steps
<p><i>If you wish to add a new document (eg CV) to a submitted application.</i></p>	<p>Note that when the document has been uploaded the applicant will be able to see it.</p> <p>If you are not comfortable and would like support, contact the <a href="#">HRIS Support Centre</a>.</p>
<p><b>9. Document is causing an error</b>  <i>If you are trying to generate an application (ie merge application and attached documents) and a document is causing an error.</i></p>	<p>a. In all cases contact the <a href="#">HRIS Support Centre</a>.</p>
<p><b>10.Re-advertise for same post</b>  <i>When a recruitment exercise fails to lead to an appointment and you want to re-advertise with the same attributes.</i></p>	<p>a. Ensure all applicant statuses are correct <b>(Section B6)</b></p> <p>b. Unlink appointment from vacancy <b>(Section B1)</b></p> <p>c. Change Vacancy Status to 'No appointment made' <b>(Section B3)</b></p> <p>d. Close vacancy <b>(Section B3)</b></p> <p>e. Create new manual vacancy for advertising <b>(Section B4)</b></p> <p>f. Link original appointment to new vacancy <b>(Section B2)</b></p> <p>g. Submit original 'Post/Appointment now authorised' email onto the Advert Team (<a href="mailto:advert@admin.ox.ac.uk">advert@admin.ox.ac.uk</a>) confirming the new vacancy number and that it is ready to advertise.</p>
<p><b>11.Re-advertise at a different grade</b>  <i>When a recruitment exercise fails to lead to an appointment and the decision is made to adjust the duties of the position and advertise at a different grade.</i></p>	<p>a. Ensure all applicant statuses are correct <b>(Section B6)</b></p> <p>b. Unlink appointment from vacancy <b>(Section B1)</b></p> <p>c. Change Vacancy Status to 'No appointment made' <b>(Section B3)</b></p> <p>d. Close vacancy <b>(Section B3)</b></p>

Scenario	System steps
	<ul style="list-style-type: none"> <li>e. Email Reward team to confirm that the original post should be made dormant – <a href="mailto:reward@admin.ox.ac.uk">reward@admin.ox.ac.uk</a></li> <li>f. Raise a new staff request and start the recruitment process from scratch follow <b><u>RQ1 Creating and approving a staff request</u></b></li> </ul>
<p><b>12. Failed recruitment – advertising not being repeated</b>  <i>When a recruitment exercise fails to lead to an appointment and the decision is made not re-advertise.</i></p>	<ul style="list-style-type: none"> <li>a. Ensure all applicant statuses are correct (<b><u>Section B6</u></b>)</li> <li>b. Change Vacancy Status to 'No appointment made' (<b><u>Section B3</u></b>)</li> <li>c. Close vacancy (<b><u>Section B3</u></b>)</li> </ul>
<p><b>13. Offer rejected by preferred candidate, now want to offer to standby candidate</b>  <i>When your preferred candidate rejects your offer (which you have recorded) and the decision is made to make an offer to your standby candidate.</i></p>	<ul style="list-style-type: none"> <li>a. In the <b>Back Office</b> update the applicant status against the original preferred applicant to 'Offer Refused' (<b><u>Section B7</u></b>)</li> <li>b. (Return to the Portal) Record new offer against the standby applicant (<b><u>Section B6</u></b>)</li> </ul>
<p><b>14. Appoint applicant from a different vacancy</b>  <i>When a recruitment exercise fails to lead to an appointment and the decision is made to appoint someone who applied for a different vacancy (that you have access to).</i></p>	<ul style="list-style-type: none"> <li>a. Ensure all applicant statuses are correct on the original vacancy (<b><u>Section B6</u></b>)</li> <li>b. Attach applicant from alternative vacancy (<b><u>Section B5</u></b>)</li> <li>c. Record the offer (<b><u>Section B6</u></b>)</li> </ul>
<p><b>15. Make a direct appointment</b>  <i>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).</i></p>	<ul style="list-style-type: none"> <li>a. Unlink the planned appointment from the vacancy (<b><u>Section B1</u></b>)</li> <li>b. Change Vacancy Status to 'No appointment made' (<b><u>Section B3</u></b>)</li> <li>c. Close vacancy (<b><u>Section B3</u></b>)</li> <li>d. Follow the <b><u>PA2g Direct Appoint QRG</u></b></li> </ul>
<b>New starter didn't show</b>	

Scenario	System steps
<p><b>16. New starter didn't show and plan to re-advertise to the same appointment</b>  <i>This is where the new starter's record has been created in the Personnel module, they have declined the job and the decision has been made to re-advertise with exactly the same attributes.</i></p>	<p>Follow the steps listed, but note some of the steps take place in the Personnel module.</p> <ol style="list-style-type: none"> <li>End the appointment against the employee's record and update leaving fields according <b>(Section B8)</b></li> <li>Raise a new staff request and start recruitment exercise from scratch (follow <b>RQ1 Creating and approving a staff request</b>)</li> </ol>
<p><b>17. New starter didn't show, so wish to make offer to standby candidate</b>  <i>This is where the new starter's record has been created in the Personnel module, they have declined the job and the decision has been made to make an offer to the standby candidate.</i></p>	<p>Follow the steps listed, but note some of the steps take place in the Personnel module.</p> <ol style="list-style-type: none"> <li>End the appointment against the employee's record and update leaving fields according <b>(Section B8)</b></li> <li>Raise a staff request for a replacement / refill (to request a new planned appointment) (follow <b>RQ1 Creating and approving a staff request</b>)</li> <li>In the <b>Back Office</b> update the applicant status against the original applicant to 'Offer Refused' <b>(Section B7)</b></li> <li>(Return to Portal) Link new planned appointment to original vacancy <b>(Section B2)</b></li> <li>Record offer using new planned appointment against the standby applicant <b>(Section B6)</b></li> </ol>
<b>Corrections</b>	
<p><b>18. Recorded offer against wrong applicant (not appointed)</b></p>	<ol style="list-style-type: none"> <li>In the <b>Back Office</b> update the applicant status against the original applicant to 'Offer Refused' <b>(Section B7)</b></li> </ol>

Scenario	System steps
<p><i>Where the offer has been recorded against the wrong applicant and the incorrect new starter's record has not been created in the Personnel module.</i></p>	<p>b. (Return to the Portal) Record offer against the correct applicant <b>(Section B6)</b></p>
<p><b>19. Recorded offer against wrong applicant (appointed)</b>  <i>Where the offer has been recorded against the wrong applicant and the incorrect new starter's record has been created in the Personnel module.</i></p>	<p>Follow the steps listed, but note some of the steps take place in the Personnel module.</p> <p>a. End the appointment against the employee's record and update leaving fields according <b>(Section B8)</b></p> <p>b. Request new planned appointment from the Reward team - <a href="mailto:reward@admin.ox.ac.uk">reward@admin.ox.ac.uk</a></p> <p>c. In the <b>Back Office</b> update the applicant status against the incorrect applicant to 'Offer Refused' <b>(Section B7)</b></p> <p>d. (Return to the Portal) Link new planned appointment to vacancy <b>(Section B2)</b></p> <p>e. Record offer against the correct applicant using new planned appointment <b>(Section B6)</b></p>
<p><b>20. Recorded offer using the wrong post (not appointed)</b>  <i>Where the wrong appointment was used and the offer has been recorded and the incorrect new starter's record has not been created in the Personnel module.</i></p>	<p>a. In the <b>Back Office</b> update the applicant status to 'Offer refused' <b>(Section B7)</b></p> <p>b. (Return to the Portal) Unlink the planned appointment from the vacancy <b>(Section B1)</b>.</p> <p>c. Link the correct appointment to the vacancy <b>(Section B2)</b></p> <p>d. Record offer against the successful applicant <b>(Section B6)</b></p>

Scenario	System steps
<p><b>21. Recorded offer using the wrong post (appointed)</b>  <i>Where the wrong appointment was used and the offer has been recorded and the incorrect new starter's record has been created in the Personnel module.</i></p>	<p>The system steps will depend upon the individual circumstances, contact the HRIS Support Centre for guidance.</p>
<p><b>22. Change a recorded offer (not appointed)</b>  <i>If you have recorded an offer (made or accepted) and you need to change something on the appointing wizard.</i></p> <p><i>For example, you need to update the salary point.</i></p>	<ol style="list-style-type: none"> <li>Update applicant status to 'Offer Refused'</li> <li>Update applicant status to 'Offer Made - Personnel'</li> <li>Record new point (or other detail) on the appointing wizard</li> <li>Update applicant status to 'Offer Accepted - Personnel' <b>(Section B6)</b></li> </ol>
<p><b>23. Applicant is linked to the wrong employee</b>  <i>During the appointment process if an applicant is accidentally linked to the wrong employee.</i></p>	<p>The system steps will depend upon the individual circumstances, contact the HRIS Support Centre for guidance.</p>
<p><b>24. Direct appointment, but appointment has been linked to a vacancy</b>  <i>When you are recording a new starter as a direct appointment, but the planned appointment has been linked to the vacancy (which was never advertised). You won't be able to appoint until it has been unlinked from the vacancy.</i></p>	<ol style="list-style-type: none"> <li>Unlink the planned appointment from the vacancy <b>(Section B1)</b></li> <li>Change Vacancy Status to 'No appointment made' <b>(Section B3)</b></li> <li>Close vacancy <b>(Section B3)</b></li> <li>Follow the <b>PA2g Direct Appoint QRG</b></li> </ol>
<p><b>25. Assigned wrong planned appointment to a vacancy</b>  <i>Where an incorrect planned appointment has been linked to a vacancy and needs to be unlinked.</i></p>	<ol style="list-style-type: none"> <li>Unlink incorrect planned appointment from the vacancy <b>(Section B1)</b></li> <li>Link correct planned appointment to the vacancy <b>(Section B2)</b></li> </ol>



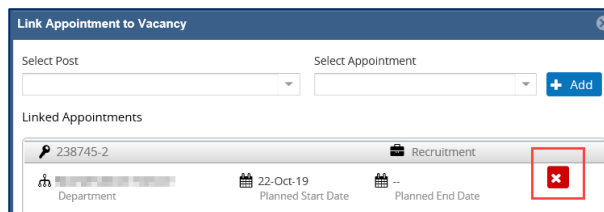
## B. Process steps

### 1. Unlink planned appointment from vacancy

Core Portal > corehr > Recruitment Dashboard > Vacancies

1. Search for your vacancy.
2. From the **Actions** option, select **Edit Vacancy**.
3. From the Vacancy Details – 1 tab, click **Linked Appointments**.

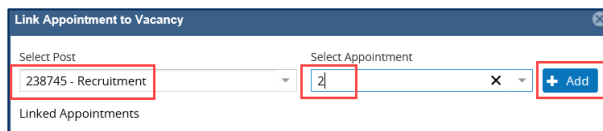
4. Click the 'X' next to the appointment.
5. Close the window.



### 2. Link planned appointment to vacancy

Core Portal > corehr > Recruitment Dashboard > Vacancies

1. Search for your vacancy.
2. From the **Actions** option, select **Edit Vacancy**.
3. From the Vacancy Details – 1 tab, click **Linked Appointments**.



4. Enter post number (6 digits to the left of the '/' in the planned appointment) in the **Select Post** field.
5. Enter the sequence number (number after the '/' in the planned appointment) in the **Select Appointment** field.
6. Click **Add**.
7. Close the window.

### 3. Close vacancy (including vacancy status)

Core Portal > corehr > Recruitment Dashboard > Vacancies

1. Search for your vacancy.
2. From the **Actions** option, select **Edit Vacancy**.
3. From the Vacancy Details – 1 tab, update the following fields:

1. **Status** field, eg to 'No Appointment Made'.
2. **Currently** field, to 'Closed'.
3. **Closing Date** field, to today's date.
4. Click **Save** (scroll to the bottom of the screen).

#### 4. Create new manual vacancy

Core Portal > corehr > Recruitment Dashboard > Vacancies

1. Click the **Add Vacancy** button.
2. Enter the **job title** which will be used on the vacancy (this will appear in the Description field).
3. Select the **department** related to the vacancy.
4. Enter **today's date** in the Enter Open Dates field.
5. Click **Create Vacancy**.

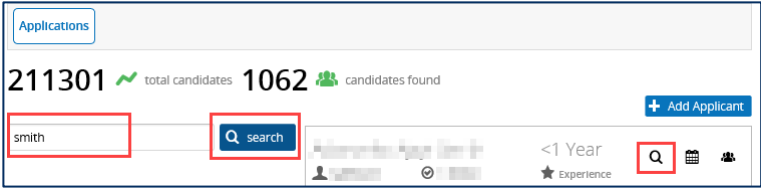
6. The new vacancy will open, update the fields ready for advertising, refer to the Prepare a vacancy for advertising – field definitions document.
7. Note the vacancy number for future reference.

#### 5. 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.

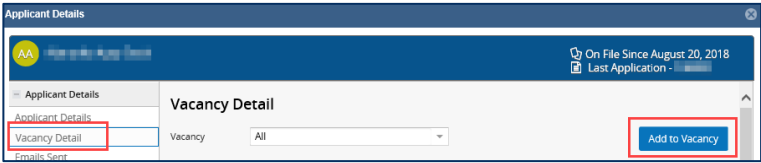
**Core Portal > corehr > Recruitment Dashboard > Applicant Detail**

1. Locate your applicant by entering their name and clicking **Search**.



2. Once you have located your applicant, click  to view the applicant's details.

3. The *Applicant Details* window opens.



4. Select the **Vacancy Detail** menu.

5. Click **Add to Vacancy**.

6. The *Add To Vacancy* window opens.




7. Enter the vacancy ID for the vacancy you want to add the applicant to. Be sure this is the correct vacancy before proceeding.

8. Click **Add**.

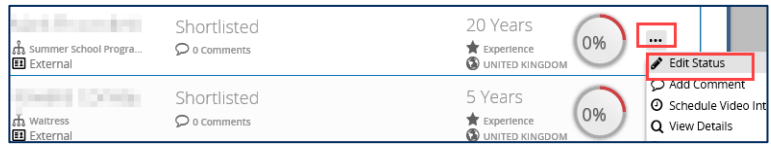
**6. Update applicant status and record offers**

For full guidance relating to applicant statuses refer to the [REC00 – Recruitment basics ORG.](#)

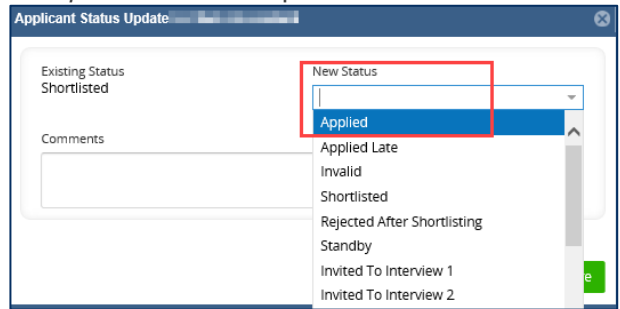
**Core Portal > corehr > Recruitment Dashboard > Vacancies**

1. Search for your vacancy.
2. From the **Actions** option, select **View Applicants**.
3. Click  against the relevant applicant.

4. Select **Edit Status**.



5. The *Applicant Status Update* window opens.

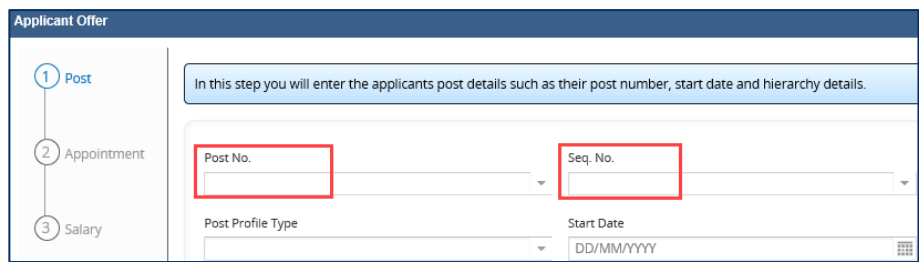


6. Select the relevant status from the New Status drop down menu. If you are recording an offer, select 'Offer Made Personnel'.

7. Click **Save**.

If you are not recording an offer, don't follow the remaining steps.

8. If you have selected 'Offer Made - Personnel', the *appointing wizard* opens.



9. Enter the planned appointment linked to the vacancy in the Post No. and Seq No. fields (step 1 Post), by clicking on the drop down arrows.

10. Update the **salary point** (Applicant Offer Part 3 Salary) if necessary.


11. Click **Save** on Applicant Offer Part 3 (Salary).

12. Repeat steps 3 – 7 and enter 'Offer Accepted – Personnel' as the applicant status. They will now appear on the applicants tab in the personnel module ready to be appointed.

**7. Record offer refused (Back Office)**

**Core Portal > Quick Jump > Back Office > Core Personnel > Recruitment > Recruitment Maintenance > Vacancy Detail**

1. Complete search criteria and click **Search** to find the relevant vacancy.
2. Double click to open the vacancy.

3. From the **Select Detail** menu select **Applicant Status**.
4. Click on the relevant Applicant ID to select the applicant, then select 'Offer Refused' from the Applicant Status drop down list.
5. Click **Save** and **OK**.
6. Use the  icon repeatedly to exit out of the Back Office.

## 8. End appointment on employee's record

The following needs to be recorded on the employee's record in the Personnel module of CoreHR. Refer to **QRG EA1 Ending appointment(s)** entering the details as shown below:

1. Complete details as relevant:

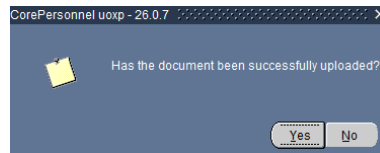
Field Name (* mandatory)	Description
<b>Effective Date *</b>	If the new starter did not show: <b>Same as start date.</b> If the new starter stayed less than 6 months: <b>Last paid/working day</b>
<b>Leaving Code *</b>	If the new starter did not show: <b>Other</b> If the new starter stayed less than 6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

## 9. Add document to a submitted application in the Back Office

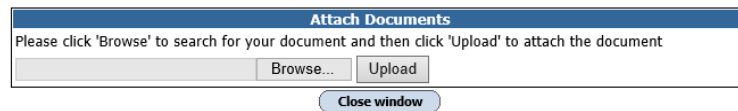
**Core Portal > Quick Jump > Back Office > Core Personnel > Recruitment > Recruitment Maintenance > Vacancy Detail**


1. Complete search criteria and click **Search** to find the relevant vacancy.
2. Double click to open the vacancy.
3. From the **Select Detail** menu select **Applicant Status**.
4. Click on the relevant Applicant ID to select the applicant, then select the **Applicant Detail** button from the bottom of the screen.

5. From the **Select Detail** menu select **Vacancy Detail**.
6. Click on the relevant Vacancy ID so that it is highlighted blue.
7. Right click on the vacancy ID and select **View Documents**.
8. Click the **Load Document** button
9. The following will appear, ignore it.



10. Navigate to your web browser and browse and select the applicant's document (this will be need to be saved already to your PC in a secure location).



11. Click Yes to the message (see step 9).
12. If there was a document that no longer needs to be included in the application, e.g. a previous version of the CV, you can tick **Ignore** next to the relevant document.
13. Use the  icon repeatedly to exit out of the Back Office.