

This guide covers the steps to complete in CoreHR once a preferred candidate has been identified. This includes linking the planned appointment to the vacancy, updating applicant and vacancy statuses and events, and recording an offer to the successful candidate. There are links throughout this guide linking you to sections within it.

This guide covers the following process steps:

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## 1. Preferred candidate and standby

Following interviews, a preferred candidate will have been chosen by the selection panel, and possibly a standby candidate too (ie second choice). The **Manage Recruitment statuses and events** guide explains how to update their applicant statuses. Before recording offer details, link the appointment to the vacancy and update the vacancy status.

## 2. Link planned appointment to the 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. If the incorrect post is linked, you can remove it.

Appointment	Description	Department	Planned Start Date	Planned End Date	
251350-2	Administrative Support	Mathematical Institute	25-Feb-20	--	REMOVE

8. Click the white back arrow once (found next to the **Vacancy Details** title) to return you to the **Vacancy Details -1** screen.
9. Select the drop-down under **Status**.
10. Select **Offer Made** status.
11. Click the **SAVE** button bottom right.
12. A success message appears, wait for the dark green line to fill.
13. To exit, click the white back arrow once next to the title **Recruitment**.

## 3. Applicant Events

Depending on the candidate and the post, specific checks will be required. These are called Applicant Events. These events make a pre-employment checklist in CoreHR for you to follow and record the checks, once completed (off system). The appropriate events need to be selected from the vacancy and cascaded to the applicant.

## Define the applicant events

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

1. Click on **Events** in the left-side menu.
2. Select **Applicant Events**.
3. Select the events that are appropriate for this hire from the **Available** list. There are several ways to locate and select the relevant events:
  - 3.1. Search for events using the event name and click once on the event, then search again and select until all required events are found and selected.
  - 3.2. Scroll up and down the list and click once on each required event.
  - 3.3. Click on **Select All** at the bottom of the list to select all events.



**Note\*** You must select both applicable checks where necessary, eg **Right to Work Evidence Requested** and **Right to Work Confirmed**.

4. Click the small right-facing arrow to move the selected events from the **Available** list to the **Selected** list.



5. The selected events will present in the **Selected** list and will be highlighted.



**Note\*** If you incorrectly selected an event, click the **Deselect All** button at the bottom of the **Selected** list. Click once on the incorrect event. Click the small left-facing arrow. This will move the incorrect event back to the **Available** list. Click **Select All** in the **Selected** list before continuing to step 6.

6. Click the green **SAVE** button bottom right of the screen to cascade the events to the applicants.
7. A green success message will appear - wait for the dark green line to fill.
8. Click **Recruitment** in the breadcrumbs to exit. If a **Changes Detected** message appears, ignore this, and click **Yes**.



**Note\*** The events will cascade to all applicants, except an applicant with the status 'Offer Accepted – Personnel'.

## Complete applicant events

Core Portal > Employee Dashboard > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants

1. Search for the preferred candidate, either using their name or status.
2. Click the ellipsis (three dots).
3. Select **Applicant Details**.
4. Click **Events** in the left-side menu.
5. The selected list of events will appear here. As will events selected for all vacancies they have applied for.
6. Select your vacancy from the drop-down under the title **Events**.
7. Click on the **Edit** button to record an event as complete. The Edit Applicant Event window opens.

Edit Applicant Event

Complete

Date

CANCEL OK

8. Slide the toggle to mark the event as complete.
9. Enter the date the event was completed.
10. Click **OK**.
11. A success message appears - wait for the dark green line to fill. The status of the event will change to **Complete**.
12. Follow steps 7-11 for each event that can be marked as completed.

The completion of each required event will automatically be recorded within People Management.

## 4. Record offer

The verbal offer details must be captured in Recruitment in CoreHR. When the candidate accepts the offer, update the details against the relevant vacancy before the vacancy is closed. These details are captured by updating the applicant status.




**Note\*** The updating of these statuses at each stage is imperative for equal opportunities monitoring and reporting.

## Record verbal offer

Core Portal > Employee Dashboard > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants

1. Search for the preferred candidate, either using their name or status.
2. Click the ellipsis (three dots).
3. Select **Edit Status**. The **Edit Status** window will open.

Edit Status: 

Current Status  
Preferred Candidate

Status\*  
Offer Made - Personnel

Comments

CANCEL

4. Click the drop-down under Status and select **Offer Made- Personnel**. **NB** Must not be **Offer Made**.
5. Click **OK**.
6. A success message appears - wait for the dark green line to fill.
7. The **Applicant Offer** screen will open. This has three stages: **Post**, **Appointment** and **Salary**.
8. Starting with **Post**, select the post ID from the drop-down under the title **Post Number**.
9. Select the Sequence from the drop-down.




**Note\*** If the post number or post number sequence you are expecting is not in either drop-down list, contact HRIS Support.

10. The post details will populate from the staff request.
11. Enter/ change the details shown below as relevant to the offer details known at this time. Do not change any fields not captured in the table. If preferred, this information can be completed at appointment stage.

Field Name (* mandatory)	Description
<b>Start Date *</b>	Enter expected start date, if known.
<b>Target End Date *</b>	If the post is permanent, leave blank. If the contract is fixed-term, enter the contract end date in both fields. Date format: DD-MM-YYYY

12. Click **NEXT**.

Field Name (* mandatory)	Description
<b>Employee Status *</b>	Refers to contract type. See <b>People Profile matrix</b> Check/select relevant eg Permanent, Fixed-term etc
<b>Sub Status *</b>	Refers to working pattern. See <b>People Profile matrix</b> Select relevant, eg Full-Time, Part-Time, Term-Time etc

<b>Hours *</b>	Enter the number of hours the individual is contracted to work each week – refer to <b>Overview of Working Hours</b> guide and relevant scenario factsheet.
<b>Standard Hours *</b>	Enter the hours the individual would work if they were full-time (ie not actual hours worked per week). When navigating away from this field, the FTE will update automatically.
<b>Weeks</b> (term-time employees only) 	Enter the number of weeks the employee works per year, including holiday entitlement. Eg if they work 38 weeks per year and are entitled to 4 weeks' holiday, enter 42 weeks. <b>NB</b> only applicable to term-time employees who are paid <b>the same amount each month</b> .
<b>Comments</b>	Record anything of interest about the offer made.

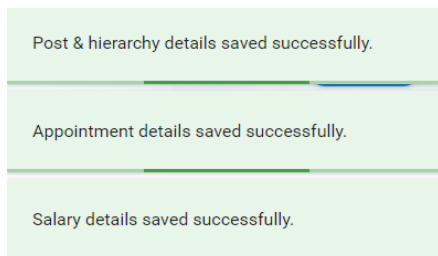
13. Click **NEXT**.

14. If required change/check any details relevant to pay, specifically the point to ensure it matches the verbal offer.

Field Name (* mandatory)	Description
<b>Point on Scale *</b>	Check/update the salary scale point, as required.
<b>Multiplier *</b>	Check as expected. If it is not, click <b>PREVIOUS</b> , and correct Hours. Refer to <b>Overview of working hours</b> guide. This should match the FTE.

15. Click **SAVE**, bottom right of the screen.

16. Three success messages appear. Wait for the dark green line to fill on all.



17. You are taken back to the Applicant Details screen. The offer details can be viewed by selecting the ellipsis (three dots) at the end of the successful applicant's row and selecting **Offer Details**. Do not make any changes here to the offer.

18. Click **Applicant Details** in the breadcrumbs to exit. Select **Yes** to the **Changes Detected** message.

19. Click the white back arrow next to the screen title to exit.

## Offer under consideration

The successful applicant will consider the offer made and either:

- accept the offer with no changes, (see Record accepted offer, below); or
- negotiate over the offer, (see Offer changes or corrections, below); or
- reject the offer (see 'Offer declined', below).

## Record accepted offer

When the verbal offer has been accepted, record the details in Recruitment, in order that they can be pulled through to **People Management**.

1. Follow steps [1-3 of Record verbal offer](#).
2. Click the drop-down under Status and select **Offer Accepted- Personnel**. **NB** Must not be **Offer Accepted**.
3. Click **OK**.
4. A success message appears, wait for the dark green line to fill.
5. The offer details can be viewed by selecting the ellipsis (three dots) at the end of the successful applicant's row and selecting **Offer Details**. Do not make any changes here to the offer.
6. Click **Applicant Details** in the breadcrumbs to exit. Select **Yes** to the **Changes Detected** message.
7. Click the white back arrow next to the screen title to exit.

## Offer changes or corrections

If the applicant has negotiated different terms and conditions to their original offer, or you need to make a change to the recorded offer, update this in CoreHR.

1. Follow steps [1-3 of Record verbal offer](#).
2. Click the drop-down under **Status** and select **Applied** (current system workaround).
3. Click **OK**.
4. A success message appears - wait for the dark green line to fill.
5. Follow steps [3- 17 of Record verbal offer](#), to update the status again, and this time amend the details in the **Applicant Offer** screen, to match the new agreed offer, or the change.
6. Follow steps [2-6 of Record accepted offer](#) to complete the offer process.

## Offer declined

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

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

System steps on managing such situations (and more), when recruiting does not go to plan, are covered in the **Manage unplanned recruitment events** guide.

## 5. References, documents etc

After recording the accepted offer, and before closing the vacancy, there are further system steps to complete. **Note:** Some of these may be completed before offering to the applicant.

## References

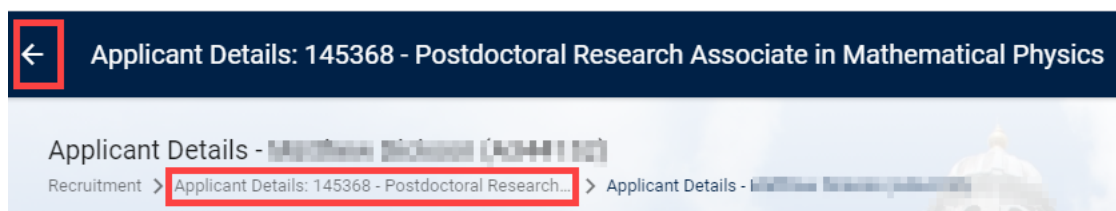
Core Portal > Employee Dashboard > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants

1. Search for the preferred candidate, either using their name or status.
2. Click the ellipsis (three dots).
3. Select **Applicant Details**.
4. Select **Referees** in the left-side menu.
5. Select your vacancy from the drop-down under the title **Referees**.

Applicant Name	Position	Address
Matthew Wilson	Postdoctoral Research Associate	University of Warwick
Matthew Wilson	Postdoctoral Research Associate	Institute of Mathematics
Matthew Wilson	Postdoctoral Research Associate	University of Münster

The **Referee** screen shows the following:

1. The name of the referee - under the column **Applicant Name**.
2. Whether the referee may be contacted - from the **Contactable** column.
3. The ellipsis allows further options, such as:
  - Viewing information about that referee, eg their contact information.
  - Editing personal information and contact details for that referee.
  - Deleting the referee (removing all their information from this applicant).
6. To exit, use either the white back arrow or the breadcrumbs.



## Document production

You may be required to produce letters and forms to send to the successful applicant, such as:

- Congregation form
- Data Collection form
- Pre-emp Health Questionnaire
- University Card form

The above list is not exhaustive. Check with your department which letters should be sent. Wherever possible, generate these documents through CoreHR.

Follow the **Generate and download letters and forms in CoreHR** guide or follow the **Create and track applicant emails** guide, if you wish to create and email these forms to the successful applicant.



## Vacancy events

Vacancy events must be reviewed and completed at the end of the recruitment process. These are indicated in **Events** with the prefix ~. Follow the **Manage Recruitment statuses and events** guide to update these, before closing the vacancy.

## 6. Next Steps

The vacancy **must** be closed at the end of the recruitment exercise. Leaving vacancies open will impact reporting and affect the speed and performance of CoreHR. Follow the **Close a vacancy** guide.