Recruitment Services

National Standard Operating Procedures for Jobtrain Recruitment System

Managing Applications to Interview Outcome

August 2019

See www.eess.nhs.scot for all latest SOPs, eLearning and further information
Table of Contents

Once the job is advertised 3

Managing applications 3
  Application symbols 4
  For information only – to be completed by the manager (shortlisting) 6

Notifications 7
  Post on hold 8
  Post withdrawn 8
  Shortlisting outcome – Unsuccessful at shortlisting 8

Arranging interviews 9
  Candidate self service 9
  Booking a slot on behalf of a candidate 11
  Allocating interview times – non self service 12

Preparing for interviews 13
  Interview schedule – candidate self-service 13
  Interview scheduled – candidate non self service 14

After interview 14
  Interview outcomes 15
  Offer form 16

Help and support 17

Appendices 18
Once the job is advertised

Once advertised, the job should be tagged as ‘my job’. When the advert closes, the vacancy status should be changed from ‘Live Advert’ to ‘Shortlisting’.

NB. There may be instances where a post is going to close early due to volume of applications. All candidates with incomplete applications should be emailed to inform them the post is closing/ has closed early. Select all emails and use the template Candidate - Post Closing/Closed Early (appendix 1)

Managing applications

Selecting ‘Jobs & Talent’ will allow you to see all vacancies in your Board.

Selecting the ‘My Jobs’ tile will show all vacancies you have tagged as your own.

<table>
<thead>
<tr>
<th>Job Reference</th>
<th>Job Title</th>
<th>Job Status</th>
<th>Location</th>
<th>Start Date</th>
<th>Closing Date</th>
<th>Is Live</th>
<th>Total</th>
<th>New</th>
<th>S/List</th>
<th>List</th>
</tr>
</thead>
<tbody>
<tr>
<td>00006</td>
<td>Recruitment Coordinator</td>
<td>Live</td>
<td>St John’s Hospital</td>
<td>30/01/2019</td>
<td>Yes</td>
<td>7</td>
<td>0</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>000047</td>
<td>Administrative Officer</td>
<td>Live</td>
<td>38/10 A Gyle Square</td>
<td>01/03/2019</td>
<td>Yes</td>
<td>26</td>
<td>6</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>000068</td>
<td>Generic Admin 2 Post</td>
<td>Live</td>
<td>St John’s Hospital</td>
<td>31/01/2019</td>
<td>Yes</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Job Status column can be sorted a-z which will group the vacancies by which stage of the recruitment process they are at.

The Total column displays the total number of applications received for the vacancy.

The New column displays the number of applications that are awaiting the Hiring Managers shortlisting decision. Managers should be encouraged to shortlist applications before the advert closes.

The S/List column displays the number of applications who have been shortlisted.

To view any job details, select the reference number/ job title.

To view the candidates, select List
### Application symbols

You may see certain symbols next to a candidate's name. The key below indicates what these mean. The symbols are visible to both the recruitment team and the Recruiting Manager.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="tick.png" alt="Tick" /> <img src="cross.png" alt="Cross" /></td>
<td>If you see a candidate with either a tick or cross against their record, this indicates whether they have passed or failed the pre-assessment/killer questions set against the job.</td>
</tr>
<tr>
<td>** **</td>
<td>A candidate with two asterisks against their record indicates that the candidate has made multiple applications to NHS Scotland.</td>
</tr>
<tr>
<td><img src="icon.png" alt="Icon" /></td>
<td>A candidate with an icon against their record indicates that it is an internal application.</td>
</tr>
<tr>
<td><img src="red-dot.png" alt="Red Dot" /></td>
<td>A candidate with a red dot against their record indicates that it is an agency candidate.</td>
</tr>
<tr>
<td><img src="gap.png" alt="Gap" /></td>
<td>A gap symbol indicates that the candidate has gaps in their employment history.</td>
</tr>
<tr>
<td><img src="paperclip.png" alt="Paperclip" /></td>
<td>A paperclip symbol indicates that the candidate has additional documents added against their record.</td>
</tr>
<tr>
<td><img src="plus.png" alt="Plus" /></td>
<td>A plus symbol indicates that the candidate has either been manually added or re-assigned to the jobs by a user.</td>
</tr>
<tr>
<td><img src="two-ticks.png" alt="Two-Ticks" /></td>
<td>A candidate with the two-ticks symbol indicates that the candidate has identified they have a disability.</td>
</tr>
</tbody>
</table>
Managing Applications Cont.

Candidates will have a number in brackets next to their name, this is their candidate number and will be how managers identify candidates.

To access a candidate’s application form, click on the candidate name within the candidate list page. A new window will then open up and you are able to view the candidate’s application.

At this stage, please check if the candidates require a Tier 2 visa (personal details), if yes, please refer to local process and if relevant email them (appendix 2) to advise their application will be placed on hold.

The tabs across the top of the page allow you to view each section of the candidate’s application form.

Navigation between applications

To view the next application, click on the next candidate name to open their application form contents.
The manager will review each application against the post criteria and select 'Application Assessment Form'.

The application assessment form will be displayed for the manager to complete and 'Save'. The content of the form may differ from one role to another.

The manager should ensure the number in brackets under Q3 is replicated in the Screening Score, this will generate a shortlisting score.
The manager will then change the status of the candidate to reflect the outcome of shortlisting.

The manager will change the status to either ‘Application review – recommend failed (shortlisting)’ or ‘Application review – recommend invite to interview’.

There is an additional status ‘Application review – recommend application shortlisted (optional for longlist)’ this should be used for longlisting.

Notifications

As the manager changes the status of the candidates, notifications will appear on your dashboard. Your notifications bar should be checked daily.

If you have any jobs which are going through the authorisation process, notifications of authorisations will also appear on this bar.

When all candidate applications have been reviewed, the New column will be 0 (see page 2) and all candidates should have a status of either ‘Application review – recommend failed (shortlisting)’ or ‘Application review – recommend invite to interview’.
Post On Hold

If a post is put on hold at any stage of the recruitment process, all candidates who have applied, and any with incomplete applications should be email to inform them. Select all candidates and send email titled Candidate- Post On Hold (Appendix 3).

Post Withdrawn

If the post is subsequently withdrawn, all candidates who have applied, and any with incomplete applications should be email to inform them. Follow the same instructions.

Shortlisting Outcome – Unsuccessful at shortlisting

To reject all candidates who have been unsuccessful at shortlisting select list by status and choose ‘application review – recommend failed (shortlisting)’. This will bring up all candidates who the manager has recommended unsuccessful at shortlisting stage.

Select all candidates and change status to ‘Application review – failed (shortlisting) (+ email) (appendix 5).
The following pop-up will then appear, check all details and select Confirm.

If the status contains (+email) there is an automatic email attached to the status which will send when the status is triggered.

Interview arrangements should be finalised before changing the status of those the manager wishes to attend interview.

**Arranging interviews**

**Candidate Self Service**

The interview calendar event will have been created previously (please see part 1 of SOP). The manager should log on and add in their availability to create the interview slots (please see Hiring Manager SOP for details).

Candidates should be invited to interview before their status is changed.

View the list of candidates and select each candidate who will be invited to interview and select **Send Email**.
In the select an email bar start typing invite to interview and select the correct email form the list: Candidate - Invite to Interview (SS Cal - Auto) (appendix 6).

You will see a series of merge fields, they will be look like {Jobs.Location}. These will pull through information from the calendar to the email. Please preview the email before sending to ensure all details have pulled through correctly.

When you are happy with the email press send. All emails will go into a 15 minute queue before being sent to the candidate.

The last step is to go back into the calendar entry and switch the Candidate Self Service and change this to YES (see page 17). This will allow candidates to log in and chose their own time.
Booking a Slot on behalf of a Candidate

2 days before interview, the candidate will no longer be able to select an interview slot. If they still wish to attend an interview, the recruiter should book the slot on their behalf.

Go into your list of candidates and select the Calendar icon in the Interview Column and select List available appointments.

Select the chosen slot and click confirm. This will end an email to the candidate confirming the date and time of their interview (appendix 7).

<table>
<thead>
<tr>
<th>Candidate:</th>
<th>Clare Ryder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job:</td>
<td>000288 / GC Payroll Officer</td>
</tr>
<tr>
<td>Subject:</td>
<td>000431 Payroll Officer Interviews</td>
</tr>
<tr>
<td>Location:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>08 May 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00</td>
</tr>
<tr>
<td>1 Appointments Available</td>
</tr>
</tbody>
</table>

| 09:30        |
| 1 Appointments Available |

| 10:00        |
| 1 Appointments Available |
Allocating Interview Times - Non self-service

To add an interview date, not using the self-service function, go into your list of candidates and select the Calendar icon in the Interview Column and select Create new appointment.

Enter the Interview Date and Interview Time, then Save.

Please note:
Date and time formats must be entered as follows:

- Date: dd/mm/yyyy format (e.g. 03/01/2017).
- Time: HH:MM (e.g. 10:00).

When the date and time has saved successfully, the calendar icon will change to display the date and time selected when you view your list of candidates. You may need to re-fresh your page to view this, press F5.

You can now trigger the invitations to your shortlisted candidates using the send email option and using the email Candidate - Invite to Interview (Standard/Non-Cal) (appendix 8).

The candidate status should then be changed to ‘Candidate Selection – Invited to Interview’.

Note: If you are using this method of inviting candidates to interview you are required to pull a report for your interview schedule.
Preparring for Interviews

Interview Schedule – Candidate Self-Service

Where candidates have selected their own interview date and time, interviewers will receive an email (appendix 9). This email will include a calendar file which can be saved into their Outlook diary.

The email will provide the names of the candidates attending. To print the interview schedule, the manager should click the Calendar tile on their homepage, click on the interview event within the calendar display:

Then select the 'Candidates' tab and click print appointments:
Interview Schedule – Candidate Non Self-Service

Select reports and then chose Interview Details from the available reports

Under Job Criteria, search for the job reference number on Specific job or group of jobs.

Under Job Criteria, search for the job reference number on Specific job or group of jobs and then Export to Excel.

Once in Excel format, ensure all details are completed and the schedule is in the correct time order before saving as a pdf.

This should then be uploaded to the Job Approval tab on the Job details for managers to download/print.

After interview

After interview, the manager will complete & upload an Interview Assessment Form (please see part 1 of SOP appendix) to each candidate record and complete an Offer Form for the preferred candidate. Please refer to the Hiring Manager SOP for further details.

This can be viewed by selecting the candidate and clicking documents. Select the Interview Assessment Form and select ‘Preview Document’.
Interview Outcomes

After interview, the manager will change the candidate’s status depending on the outcome of the interview. The manager will recommend: conditional offer to be made, candidate didn’t attend, candidate unsuccessful or reserve candidate.

The recruitment team must change the status to confirm the manager’s recommendation.

Select Change Status to drop down.

Select the status you would like to change the candidate to and select Confirm.

To reject a candidate following interview, update the status from ‘Interview selection complete – recommend unsuccessful after interview’ to: ‘Interview selection complete – unsuccessful after panel interview (+email)’ (appendix 10).

For any candidates who did not attend interview, the status should be changed from ‘Interview selection complete – candidate did not attend interview to ‘Interview selection complete – candidate did not attend interview (+email)’ (appendix 11).

Emails detailing the outcome of the interview will be automatically sent to the candidates.

For candidates who would be appointable but are not the preferred candidate, the manager will ‘recommend reserve list’, the conditional offer should be made and accepted by the preferred candidate before changing the status to ‘Interview selection complete- reserve list (+email)’ for any reserve candidates (appendix 12).

Please note, status of the preferred candidate should remain as ‘Conditional offer – recommend offer’ until the candidate has been contacted and conditional offer made, it should then be changed to ‘Conditional offer – offer made (+2nd stage application).
Offer Form

The manager will complete an offer form for the preferred candidate.

Whilst viewing the candidate record, select Offer Form.

Review the form and add in any details the manager has not completed.

Section 1 and section 4 must be completed for all posts, section 2 is for Medical & Dental posts and section 3 is for Executive posts.
Help & Support

For further support:

• See the NHS Scotland SOPs, guides and Frequently Asked Questions here - https://www.eess.nhs.scot/recruitment/

• See your local Recruitment System Manager

Within Jobtrain the Knowledge Hub also includes generic system downloadable user guides, FAQs, Jobtrain newsletters and booking details for weekly HOW sessions.
Email to Candidates
Post Closed/Closing Early

Re. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}

Dear {CANDIDATES.TITLE} {CANDIDATES.LASTNAME},

Thank you for your interest for the above post.

Due to the volume of applications, this post has closed prior to the closing date and as such, you will no longer be able to submit an application.

If you wish to sign up for job alerts, so you don’t miss a future post, please click here to log into your account.

OR

Due to the volume of applications we are receiving, the above post will now close on DATE.

Please click here to access the Website and to complete your application before the amended closing date if you still wish to apply.

Kind Regards
{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Candidates
Application On Hold – CoS Requirements

Dear {CANDIDATE.NAME} {CANDIDATES.LASTNAME},

RE. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}

Thank you for your recent Application Form for the above post.

In order to satisfy the requirements of the Home Office and to conduct and comply with the Resident Labour Market Test (RLMT), priority is given to UK, EEA and applicants with Entitlement to Work in the UK. As you require a Tier 2 Visa, your Application Form is currently being held by the Recruitment Team.

If we do not deem any of the UK, EEA or applicants with Entitlement to Work in the UK as suitable, your Application Form will go forward for consideration by the Hiring Manager.

If you do not hear anything further following this letter you can assume we have appointed to the post. This does not mean that your Application has been unsuccessful but is merely a result of the RLMT.

We wish you every success with future applications.

Yours sincerely

{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Dear {CANDIDATE.NAME} {CANDIDATES.LASTNAME},

RE. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}

Due to unforeseen circumstances, the recruitment process for this post has been put on hold until further notice. We will be in touch when we can provide an update on this post.

I would like to apologise for any inconvenience this may cause.

If you have any queries, please contact us directly.

Yours sincerely

{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Candidates
Post Withdrawn

Re. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}

Dear {CANDIDATES.TITLE} {CANDIDATES.LASTNAME},

Due to unforeseen circumstances, the above post has been withdrawn and therefore the recruitment process will not go any further.

I would like to apologise for any inconvenience this may cause and hope this will not deter you from applying for any future posts within our organisation.

If you would like to sign up for job alerts so you will be alerted to future, similar posts, please click here.

Yours sincerely,
{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Candidates
Unsuccessful at Shortlisting (Auto)

Re. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}

Dear {CANDIDATES.TITLE} {CANDIDATES.LASTNAME},

Thank you for your application for the above post.

Following consideration of your application by the Appointing Manager, we now write to advise that you have been unsuccessful on this occasion.

We thank you for your interest in this position and wish you every success in your search for suitable employment.

Yours sincerely
{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Candidates
 Invite to Interview - candidate self-service)

Dear {CANDIDATES.FIRSTNAME}

Thank you for your recent application for the post of {JOBS.JOBTITLEFORCANDIDATES} at {JOBS.LOCATIONNAME}.

We are very pleased to invite you to the next stage of the process.

Please log into your account here and select your preferred interview slot.

Documentation relating to the vacancy can be found here.

The interview venue will be {JOBSEXTRA.Field376}.

When you log in you may see different booking options. Please select only the one that you wish to attend.

If you wish to amend your booking please ensure that you cancel your original booking before making a new one. You will then receive a confirmation email of your interview time.

It is necessary that we check and retain photographic validation of your identity and eligibility to work in the UK. Please be advised that it is mandatory that you bring the original and one photocopy of your passport (picture page and cover page) with you to interview, along with the original and one photocopy of any two of the following documents:

- Birth Certificate
- Driving Licence (with or without photograph)
- Utility Bill (or similar document) confirming your current address

If you are unable to provide your passport, we will require your birth certificate and proof of your National Insurance number.

Where applicable for the post, please also provide the following:
- Vocational, academic or professional qualifications;
- Your relevant professional body membership document, with confirmation it has not expired;

Continued on next page...
Your relevant current professional revalidation status; National Insurance Card/Number; Most recent payslip (NHS candidates only); PVG scheme membership which includes the membership number; Current police checks from countries outwith the UK (Overseas candidates only); Confirmation of eligibility to work in the UK (Overseas candidates only)

As an employer who actively supports people with a disability, NHS Scotland is committed to providing a fully inclusive and accessible recruitment process. If you have a disability, please indicate, what adjustments you would need to allow you attend the interview in as much detail as possible, to allow arrangements to be put in place. NHS Scotland will endeavour to comply, and will always discuss any difficulties they have meeting your requirements with you.

If you are successful at interview, you will be asked at offer stage to disclose any unspent convictions and unspent cautions (from a police force in England, Wales or Northern Ireland) along with only those spent convictions relevant to the list of offences that must always be disclosed and offences that are to be disclosed according to rules.

Yours sincerely

{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Candidates 
Confirmation of Interview details

Re. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}
Dear {CANDIDATES.TITLE} {CANDIDATES.LASTNAME},

Thank you for booking your interview slot.

Your confirmed interview details are as follows:-
Date: {CalendarEntryCandidates.BookedDate}.
Time: {CalendarEntryCandidates.BookedTime}
Venue: {CalendarEntryAppointments.Location} {CalendarEntryAppointments.Instructions}

It is necessary that we check and retain photographic validation of your identity and eligibility to work in the UK. Please be advised that it is mandatory that you bring the original and one photocopy of your passport (picture page and cover page) with you to interview, along with the original and one photocopy of any two of the following documents
Birth Certificate
Driving Licence (with or without photograph)
Utility Bill (or similar document) confirming your current address

If you are unable to provide your passport, we will require your birth certificate and proof of your National Insurance number.

Where applicable for the post, please also provide the following:
Vocational, academic or professional qualifications;
Your relevant professional body membership document, with confirmation it has not expired;
Your relevant current professional revalidation status;
National Insurance Card/Number;
Most recent payslip (NHS candidates only);
PVG scheme membership which includes the membership number;
Current police checks from countries outwith the UK (Overseas candidates only);
Confirmation of eligibility to work in the UK (Overseas candidates only)

Continued on next page...
As an employer who actively supports people with a disability, NHS Scotland is committed to providing a fully inclusive and accessible recruitment process. If you have a disability, please indicate, what adjustments you would need to allow you attend the interview in as much detail as possible, to allow arrangements to be put in place. NHS Scotland will endeavour to comply, and will always discuss any difficulties they have meeting your requirements with you.

If you are successful at interview, you will be asked at offer stage to disclose any unspent convictions and unspent cautions (from a police force in England, Wales or Northern Ireland) along with only those spent convictions relevant to the list of offences that must always be disclosed and offences that are to be disclosed according to rules.

Yours sincerely
{SCHOOLLOCATIONS.SCHOOLLOCATION}
Email to Candidates
Invite to Interview - candidate non self-service

Re. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCандидатES}

Dear {CANDIDATES.TITLE} {CANDIDATES.LASTNAME},

Thank you for your recent application for the post of {JOBS.JOBTITLEFORCANDIDATES} at {JOBS.LOCATIONNAME}.

We are very pleased to invite you to the next stage of the process.

Your confirmed interview details are as follows:
Date: {CANDIDATEAPPLICATIONINTERVIEWS.InterviewDate}
Time: {CANDIDATEAPPLICATIONINTERVIEWS.InterviewTime}
Venue: {JOBSEXTRA.Field376}

Documentation relating to the vacancy can be found here.

If you have any special requirements to allow you to attend and/or participate fully in the interview, please ensure that we are notified of these as soon as possible in order that we can make the appropriate arrangements.

NB: Please reply to this email as soon as possible to accept or decline your interview quoting reference number, your full name, date and time of interview. If you do not contact us by 12 noon on the day before your interview, your interview may be cancelled.

Yours sincerely
{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Interviewers
Confirmation of interview booking

Reference: {JOBSJOBREFERENCE} 
Position: {JOBSJOBTITLE} 
Location: {CalendarEntryAppointmentsLocation} 

This email is to confirm that 
{CANDIDATESFIRSTNAME} {CANDIDATELASTNAME} (Candidate ID - 
{CANDIDATEAPPLICATIONSCANDIDATEID}) has booked the interview slot 
at {CalendarEntryCandidatesBookedTime} on 
{CalendarEntryCandidatesBookedDate}. 

Candidate contact details are as follows:- 
Mobile number: {CANDIDATESMOBILE} 
Home telephone number: {CANDIDATESHOMEPHONE} 
Email address: {CANDIDATESPRIMARYEMAIL} 

You can attach the VCS file into your Outlook calendar, however this system 
cannot remove or amend appointments within your Outlook calendar - to 
do this, please log in to view all candidates and their interview times.
Email to Candidates
Interview outcome – unsuccessful at interview

Re. {JOBSJOBREFERENCE} {JOBSJOBTITLEFORCANDIDATES}

Dear {CANDIDATESTITLE} {CANDIDATESLASTNAME},

Thank you for attending interview for the above post. Following the feedback provided by the Appointing Manager, we now write to advise that you have been unsuccessful on this occasion.

If you wish further details on the feedback received, please contact [insert hiring manager name & contact details] to arrange a suitable time to discuss.

We thank you for your interest in this position and wish you every success in your search for suitable employment. If you wish to register for vacancy alerts for any future posts that may meet your skill set please click here.

Yours sincerely
{SCHOOLLOCATIONSCHOOLLOCATION} Recruitment Team
Email to candidates
Interview outcome - did not attend interview (auto)

Re. {JOBS.JOBREFERENCE} {JOBS.JOBTITLEFORCANDIDATES}

Dear {CANDIDATES.TITLE} {CANDIDATES.LASTNAME},

As you did not attend your scheduled interview for the above post your application has been considered withdrawn.

We thank you for your original interest in our organisation and wish you every success in your search for suitable employment.

Yours sincerely
{SCHOOLLOCATIONS.SCHOOLLOCATION} Recruitment Team
Email to Candidates
Interview outcome – reserve list (auto)

Re. {JOBS JOBID} - {JOBS JOBTITLEFORCANDIDATES}

Dear {CANDIDATES TITLE} {CANDIDATES LASTNAME},

Thank you for attending the recent interview for the above post, however, I regret to advise you that after careful consideration you have not been successful on this occasion. However, due to the standard of your interview we are keen to retain your application on reserve (for a period of up to 6 months) should we be in a position to make an offer for this post at a later date.

If you would like some post interview feedback regarding your performance at interview, please contact a member of the recruitment team or the appointing manager.

I would like to thank you for the time and effort you have put into your application and wish you every success in the future.

Yours sincerely

{SCHOOLLOCATIONS SCHOOLLOCATION} Recruitment Team
Further information at http://www.eess.nhs.scot/