Managers Guide

Online Short-listing and Interview
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1. WELCOME

This guide has been designed to help you, as a manager of The Organisation, to implement the enhanced short-listing facilities made available on the NHS Jobs recruitment system. These enhanced facilities have been designed to benefit applicants, recruiting managers and recruitment staff.

If you do come across any problems during the recruitment process please do not hesitate to contact Employment Services by email or by phone.

This guide is designed to help you begin to use the service and for future reference.

Employment Services very much value your feedback about all aspects of the service they provide. Please feel free to contact us to give us your views.

NHS Jobs provides exciting opportunities to improve and streamline recruitment services – we look forward to working with you to achieve these benefits.

Kind regards

Employment Services
2. ONLINE SHORTLISTING AND TOP TIPS

There are six steps to undertake before your Interview event takes place:

1. Review of Applications
2. Finalise Shortlist
3. Create Interview Event
4. Invite Candidates to Interview
5. Print Interview Pack

Use these Top Tips to ensure all steps of the process are completed:

1. It is considered best practice for the interview panel to short list the applications. The panel should consist of a minimum of two people. Please contact Recruitment if you would like the panel to have access to the application forms via NHS Jobs to short list.
2. After you have completed the Review, remember to follow the remaining four steps listed above.
3. You can check at any time before the Interview date to see who has confirmed or declined.
4. Print application forms the day before the interview or when all candidates have confirmed/declined.

Please do not hesitate to contact the Recruitment Team should you have any queries.

VERY IMPORTANT

If due to unforeseen circumstances the vacancy is withdrawn at any stage during the process please do not contact the candidates directly yourself. Please send an email to the Recruitment Team (Please provide the Vacancy Reference Number).
3. LOGGING INTO YOUR NHS JOBS ACCOUNT

In order to view your vacancies you will need an NHS Jobs account. This consists of a registered email address, a secure password and security code. If you do not have an account, or no longer have access to the email account for your registered email address, please contact a system administrator for further assistance. The system administrator is a member of staff in your organisation, usually a member of the Recruitment Team.

To log into NHS Jobs as a recruiter, you need to visit www.jobs.nhs.uk/employers.

You will be required to enter your registered email address, account password, and your four digit security code.

If you have forgotten either your account password or your security code you will be able to request a reset using the relevant links on the login page. Please note – if you forget both your account password and your security code, you must contact a system administrator from your recruitment team who will be able to reset your login for you.

Once logged into your account you will be presented with the NHS Jobs home page. From the home page you are able to access all the functions associated with your role. This is done primarily via the navigation menu buttons located down the left hand side of the pages. Wherever you are on the site, you will be able to get back to the home page by clicking the ‘house’ image at the top of the navigation menu.

4. THE ‘MY TASKS’ AREA

The ‘My tasks’ area will provide you with a list of any vacancies or applications where you have tasks to take action on. Once you have completed your task it will be removed from your tasks list. However, you can use the other navigation tools to access these vacancies and applications and associated actions.

For ease of use, the tasks are identified with a colour coded icon based on a traffic light system as follows:

- Tasks that are within the locally defined KPI deadline will be green
- Those that are approaching the KPI deadline will be amber
- Those that have passed the KPI deadline will be red

Click on ‘My Tasks’ which will list the vacancies requiring action, e.g. short listing, interviews, etc.
5. REVIEWING APPLICATIONS

This user guide will take you through the process step by step on how to review your applications; alternatively you can access this video walk through at:

http://www.jobs.nhs.uk/nhsjobs2/training/RM_review_applications_03.html

Reviewing applications involves reading the relevant information on the forms and providing a recommendation.

Please note, the applicants personal information will not be visible. Applicants are only identifiable by their unique reference number. This is to ensure that the short-listing process is as fair as possible.

Additional Reviewers
If Additional Reviewers were entered on the Advert Request Form, they will receive a notification to submit their comments on NHS Jobs for each application. The Recruiting Manager can view the reviewers’ comments on NHS Jobs when they are short listing.

The Disability (Two Ticks) Scheme
When reviewing applications please be aware of the Disability Symbol (Two Ticks) Scheme. The purpose of the scheme is to ensure that disabled people have access to the same opportunities as others.

The Organisation has been awarded the Disability Symbol and this means that we have agreed to interview all applicants with a disability who meet the minimum essential criteria as listed in the Person Specification for a job vacancy and to consider them on their abilities.

Therefore if a disabled applicant meets the essential criteria for your post, then you must offer them an interview.

You can easily identify disabled applicants as they appear with this logo next to their application form.
GETTING STARTED
In ‘My Tasks’ list, click on the ‘Review applications’ link beside the relevant vacancy.

If you cannot see the vacancy required, try resetting the filters on the right of the screen.

The ‘Review Applications’ page identifies the state of any reviews for each application, including your own reviews. In this case two reviews are required with one ‘complete’ on every application and one ‘awaiting’. The one ‘awaiting’ is for the recruiting manager logged in.

Click on the application reference number link to view the application.

From here there are two options for reviewing applications

Option 1: Review each application one at a time

Option 2: Review the Scoring Section, e.g. Qualifications, moving between the applications

OPTION 1
- The application form will be displayed, with links to the Job Description and Person Specification included at the top of the page.
- The scoring card is presented to the right of the screen.
- Scroll down to view the whole application form. Each section can be hidden or collapsed by clicking on the section heading.
- Applications can be scored one application at a time, scrolling through the sections and recording scores.
- Click on the relevant star icon for the score required. There are four categories of criteria.
- Having recorded the appropriate scores, you then need to select your preliminary ‘Recommendation’ for this application.
- The ‘Recommendation’ options available are ‘Shortlist’ or ‘Reject’.
- When ‘Reject’ is selected, you must tick the reason for rejection.
- Before pressing ‘Submit’ have you taking into account applicants meeting the Two Tick criteria.
- Select the ‘Submit’ button to complete the review for this application.
Please DO NOT USE the ‘Reserve’ option as this is not best practice due to the candidates challenging your decision, as they either meet the criteria to be shortlisted or don’t meet the criteria to be shortlisted.

- After reviewing each application, you see confirmation that your review was successful. If you have more applications to review, click on next application.

- Once all applications have been reviewed, click on ‘Return to your Reviews’ and proceed to the next step, Finalising the Short List.

OPTION 2
- Alternatively, applications can be scored by considering one section at a time and moving between the applications.

  - Click on the relevant star icon for the score required

  - Then click on ‘Save as draft’ to save the score as you work

  - Links to the ‘Next Application’ and ‘Previous Application’ are visible above each section in the application form, enabling you to move between the applications easily.

  - When you come to score the last criteria you will need to complete your preliminary ‘Recommendation’ for each applicant.

  - The ‘Recommendation’ options available are ‘Shortlist’ or ‘Reject’.

  - When ‘Reject’ is selected, you must tick the reason for rejection.

  - Before pressing ‘Submit’ have you taking into account applicants meeting the Two Tick criteria.

  - Select the ‘Submit’ button to complete the review for this application.

Please DO NOT USE the ‘Reserve’ option as this is not best practice due to the candidates challenging your decision, as they either meet the criteria to be shortlisted or don’t meet the criteria to be shortlisted.

- Upon completing your reviews, you will see confirmation that your review was successful.

- Next, click on ‘Return to your Reviews’ and proceed to the next step, Finalising the Short List.
6. FINALISING THE SHORT LIST

You can access the video walk through via:

http://www.jobs.nhs.uk/nhsjobs2/training/RM_Shortlisting_Applications_02.html

When you are sure that all reviews are complete... Click on ‘Finalise shortlist’

This page shows you a summary of the recommendations from each reviewer, with a □ for shortlist and an X for reject and the average total scores from the reviewers.

You can use the ‘Sort by’ selection on the right to change the order the list is presented in.

For your assistance, you can download a CSV file (Excel spreadsheet) containing the score detail and recommendation for all applications from all reviews, by clicking ‘Download Info’ in the top right corner.

The scores and recommendations for each application can be viewed by clicking on ‘Expand All’.

You now need to review the Recommendation for each applicant and decide whether you wish to short list.

The recommendation and score from each reviewer is listed. The identity of the reviewer can be seen by hovering over the icon. The rank number identifies where in the list of applications this particular application came for the reviewer.

The score for each category in the score card is presented in the grid. In the example above the standard score card had been used, therefore the four default categories are listed (Qualifications, Experience, Skills and Knowledge and Desirable). The score shown in each category is the value selected on the score card multiplied by 10.

There are now two options to record your decision for the applications

Option 1: Record your decision individually for each application

Option 2: Select a number of applications and submit a ‘group action’

Note: When selecting ‘Reject’ the system will combine and store the rejection reasons recorded during the reviews, so it is not necessary to enter a reason at this stage.
Option 1 – Individual Application

• Click on ‘Actions’

• Next, select the action you wish to take for this application from the options listed and click ‘Action’

• Repeat this procedure for every application.

Option 2 – Group Action

• With this option, you can shortlist the required application in one action and reject applications in another action.

• Sort the applications in your preferred order using the options in ‘Sort by’

• Select the applications you wish to shortlist or reject by clicking here

• Then click on ‘Group Actions’

• Select the required action and click ‘Action’. Please do not use ‘Reserve’.

• After submitting your ‘Action’, you will now need to check that all applications have either been shortlisted or rejected as appropriate.

• If you wish to change a shortlisted or rejected applicant, it must be undertaken before selecting ‘Shortlist Complete’, by clicking on ‘Actions’ for the application concerned. Then selecting ‘Revert application to ‘In Review’ then ‘Action’.

• This will allow you to select the correct option for this application.

• Once all the applications have been identified as ‘shortlisted’ or ‘rejected’ (rejected applications will show as ‘Rejection Pending’) and you are satisfied with the outcome, click on the ‘Shortlisting complete’ button in the top right corner to indicate that the activity is completed.

• You will then receive this notice, click on ‘Shortlisting complete’

• Click on ‘Return to Application and proceed to the next section, Creating an Interview’
7. CREATING AN INTERVIEW

This guide will lead you through the steps; however there is also a video walk through available at:

http://www.jobs.nhs.uk/nhsjobs2/training/RM_Create_Interview_03.html

From this stage onwards, you will be able to view certain Personal Information of your shortlisted applicants, i.e. name and address by clicking on the Application Reference.

To return to your list of Applications, click on ‘Return to Applications’ in the top right corner.

Before proceeding to the next step, you will need to make a note of the number of applications you have shortlisted as a reminder for you to schedule the right number of interview slots in the next section of the system.

- To create an interview, click on ‘Actions’ for the first applicant
- Then select ‘Create interview/assessment’ and then ‘Action’.
- Select ‘Interview’ (If you require a multiple interviews to take place at the same time, please contact Recruitment for further information).
- Enter a name for the event, e.g. ‘NMR134 18/07/14’, ‘HCSW Day1 Interviews’ or ‘HCSW Day 2 Interviews’.
- Select the ‘Scheduling mode’ from the options listed.
- ‘Location’ – please give full address and post code (no abbreviations)
- ‘Report to’ – e.g. Reception, contact name
- ‘Lead Interviewer’ – Name of Recruiting Manager
- ‘Interview panel’ – Full names and job titles
- Identify if a test or presentation is required. If either are required, enter the title of test or the presentation required.
- If there are extra requirements they can be included in ‘Further information.’
- Next, confirm the date of interview.
- The date can either by typed in (DD/MM/YYYY) or use the date picker
Now enter the start and finish time for each interview (in 24 hour clock format HH:MM).

**Please Note:** Unless you are holding an assessment event, you should only enter 1 space available per slot, i.e. if you have shortlisted 3 applications, you should enter ‘1’ in spaces available then add an additional 2 slots.

- Click on ‘Add slot’ and repeat until you have the required amount of interview slots.
- Remember to factor in breaks where required, as shown above.
- Now select ‘Create’ to save and set up the event.

**Editing Interview Details**
If you need to edit the Interview event after you’ve clicked on ‘Create’;

- Go to ‘Interviews’
- Select Actions for the Vacancy you wish to edit
- Select ‘Edit interview details’ and click on ‘Action’ which will take you back into the ‘Edit Interview’ screen.

**8. INVITING APPLICANTS TO INTERVIEW**

To invite applicants to an interview:

- Select ‘Interviews’ on the navigation on the left
- Find the job reference number with the interview information in the list, select the ‘Actions’ button beside the interview.
- Click on: Invite to interview & manage schedule and then press ‘Action’
- Next click on ‘Select All’ then ‘Group Actions’
- Click on ‘Invite to Interview xxxx’ and then click ‘Action’

The selected applicants are displayed for confirmation. You should select the type of invitation, as required, then ‘Continue’.

The options are: an email from the NHS Jobs service; a letter produced for opening and printing in Word; or a CSV file to download and use in a mail-merge locally.
Additional information can be included in the email at this stage, by entering it in the ‘Additional text’ area, if it had not been added when the interview event was set up. The ‘Additional text’ appears as the last paragraph(s) in the invitation email or letter and is limited to 400 characters.

It is also possible to attach a document or file to the email sent out to the selected applicants. To do so, select the file from your local computer or network and select ‘Attach’ in the ‘Upload a new document’ section. The maximum file size is 1MB.

Having selected the email invitation, you must now preview the email by clicking on the ‘Preview’ button. You will be presented with a preview of the invitation similar to below.

When ready click on the ‘Invite’ button at the bottom of the screen to send the invitations. The system will confirm the applicants invited to interview.

Email invitations are sent out from the system immediately.

An interview invitation notification will also be presented at the top of the screen in the applicants’ account and the interview invitation listed in their ‘My Interviews’ list.

If the applicants have provided UK mobile phone numbers and indicated that they wish to receive SMS notifications, NHS Jobs will automatically send an SMS message to the applicants to notify them of an interview invitation. The wording of the SMS message will be like this example:

‘You have been invited to an interview event on 30th September at 14.30. Please log into your NHS Jobs account for details.’

NHS Jobs will also send an automated reminder SMS message the day before the event, like this example:

‘REMINDER: you have an interview event on 30th September at 14.30. Please log into your NHS Jobs account for details.’

9. VIEWING INTERVIEW DETAILS

You can view the details of the interview schedule along with any applicants shortlisted, invited to or booked into any of the time slots.

Where to start
To view the details and the schedule for an interview:

- Select ‘Interviews’ on the navigation on the left, find the interview in the list, select the ‘Actions’ button beside the interview.
• Select ‘Invite to interview & manage schedule’ and select the ‘Action’ button.

Overview
You will be able to see the applicants that have been shortlisted but not yet invited to the interview/event, the applicants that have been invited to interview but have not yet confirmed their attendance and the applicants that are booked into the slots available.

10. CONFIRMING OR DECLINING AN INTERVIEW INVITE

You can enter an applicant’s acceptance or declination of the interview invitation, should the applicant contact you directly rather than responding to the invitation on their NHS Jobs account.

Where to start
To manage the details or schedule for an interview:

• Select ‘Interviews’ on the navigation on the left, find the interview in the list, select the ‘Actions’ button beside the interview.

• Select ‘Invite to interview & manage schedule’ and select the ‘Action’ button.

Overview
You will see the interview schedule, including the applicants that have been invited and have not yet accepted their invitations. From here you can accept or decline the invitation on their behalf.

How to confirm an applicant’s acceptance for an interview

• The applicants that are invited but have not yet accepted their invitations are displayed on the Manage schedule form. Select the ‘Actions’ button beside the relevant applicant.

• Select the ‘Confirm applicant will attend interview xxxxxxxxxx’ (where xxxxxxxxxx is the appointment name) and select the ‘Action’ button.

• Where the scheduling mode for the interview required the applicant to choose a slot (either the next available slot or any slot), then you will need to select a slot for the applicant to complete the confirmation or booking. Select ‘Book’ when a slot has been selected.

• The interview schedule now updates to show this applicant as confirmed into the selected slot.

How to record an applicant declining an interview

• The applicants that are invited but have not yet accepted or declined their invitations are displayed on the Manage schedule form.
• Select the ‘Actions’ button beside the relevant applicant

• Select the ‘Applicant has declined the invitation’ option and select the ‘Action’ button.

How to resend an invitation to an applicant
• The applicants that are invited but have not yet accepted or declined their invitations are displayed on the Manage schedule form.

• Select the ‘Actions’ button beside the relevant applicant

• Select the ‘Re-send invitation’ option and select the ‘Action’ button.

• Select the invitation type, then preview and send the invitation following the same steps as the original invitation.

11. VIEWING INTERVIEW SLOTS AND NOTES

You can view a summary of the interview slots available, with any applicants invited to or booked into any of the slots.

Where to start
To view a summary of an interview:

• Select ‘Interviews’ on the navigation on the left, find the interview in the list, select the ‘Show Interview Slots and Notes’ below the interview.

Overview
You will be able to see the interview dates and times, application references and names of those booked into the slots, and whether they’ve confirmed attendance.

To add an interview note, select the green ‘Actions’ button and complete the ‘Add a note to this interview’ section.

Reasonable Adjustments
When your applicant confirms attendance they can request reasonable adjustments.

If a candidate requests reasonable adjustments the symbol below will appear after their name.

Clicking on the symbol will display the requirements.
12. PRINTING APPLICATIONS AND INTERVIEW SCHEDULE

- Log into your NHS Jobs account and go to ‘Interviews’
- Select ‘Actions’ for the relevant Vacancy
- Select ‘Download/print documents’ and then ‘Action’
- Place a tick in all five boxes
- Then click on ‘Download Interview Pack’
- You will now see the following notice:
  - ‘Download Interview Pack PDF’
- When this or a similar notice appears, click ‘Open’

Your Interview Pack will then open in Adobe pdf format, which can then be printed and saved if required. If saved, they should only be retained for 12 months, then permanently deleted.

The Interview Pack will contain the following:

- Interview Schedule
- Application forms for all confirmed candidates
- Shortlisting information (if applicable)
- Interview Notes (if applicable)
- Reviewers Notes (if applicable)

13. INTERVIEW GUIDANCE AND CHECKLIST

When you have set up your interviews, NHS Jobs will send an automated email to Recruitment. Recruitment will then email you the web link to the Recruiting Managers Pack, where you will find the Interview Guidance and Checklist.