Processing Shortlisting Outcomes on the Online Recruitment System

Rejecting a candidate

You will not want to progress candidates who have not met all essential criteria or any applicable desirable criteria.

Moving candidates through the **candidate selection workflow** will also allow candidates to track the progress of their submission when they log in to their candidate portal.

You can choose to process shortlisting outcomes either:

- **One by one** by selecting only one candidate at a time.
- **In bulk** by selecting multiple candidates that you are progressing to the same step.

You can reject a candidate from the main candidate list of the requisition or from their job submission page. The steps remain the same but are completed from different screens.

If you are selecting to reject a candidate from the requisition, select the **check box** in the first column beside the candidate's name.

Click **More Actions** at the top of the page, from the drop down menu, click **Change Step/status.**

Alternatively, you can reject a candidate from their job submission page; click **More Actions** at the top of the job submission**,** from the drop down menu click on **Change Step/status.**

No matter which screen you use to change the step and status, the resulting pop up displayed will be the same.

Under the **Change to** heading click to display the drop down and Select the **Rejected** status.

You will notice that there is a status called **DO NOT USE: Rejected – not eligible to work in the UK**. This status **must not** be selected, it relates solely to those candidates that have indicated on their submission that they are not eligible to work in the UK. This status has been set up to generate an automated rejection correspondence to those candidates.

An **additional Details or Dispositions** box will appear. Select the reason for rejection. These reasons will vary depending on what stage of the process the candidate is at.

Under the **Select Other Action** sub heading, Select to **Send Correspondence.**

Add comments as necessary. It is important to note that these comments will be tracked in the candidate's submission history. Click the **Apply and Proceed to next action** button.

This '**Send Correspondence'** pop up will display.

You can choose to send correspondence by 'Email' or by 'Printed Letter'. It is recommended that you send correspondence by **Email** as the details will then be stored in the candidate history for that role and can be accessed at a later date. You will notice that the radio button next to the EMAIL option is selected by default.

You can select to write a message from scratch or use a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at:

To use a template, select the **From Template** button and then click **Next.**

The send correspondence pop up is displayed with a selection of template letters. Click on the template you wish to use. You will notice that this will be then be highlighted in a dark shade of blue.

You will be now able to review the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

Click the **Select template** button at the bottom of the pop up.

Enter a relevant email address in the missing information section to populate on the letter should the candidate require any further assistance. Click apply.

When the missing information has been resolved, Click Apply to continue. You will now be able to preview your letter.

If you need to edit a template correspondence, you can do so by clicking on the **Edit Message** at the top of the screen.

You may wish to add attachments, insert a school logo or edit the email address the correspondence is being issued from.

In the event that you wish to add your school logo, please refer to the associated system user guides where more detail on this process has been provided.

Please note that the default email address is the **EA Resourcing Team**.

To issue this correspondence, click **Apply and Close.**

A pop up will now appear to confirm that this correspondence has been issued.

<u>Rejecting candidates in bulk</u>

Alternatively, you can choose to reject multiple candidates. To perform this action, you will need to do this from the submissions list and the candidate that you have selected must be in the same step and status, for example, **shortlisting step and status - new**. Select the **check box** in the first column for those candidates that you are rejecting.

Click **More Actions** at the top of the page, from the drop down menu, click on **Change Step/status.**

Select the reason for rejection. An **additional Details or Dispositions** box will appear. Select the reason for rejection. These reasons will vary depending on what stage of the process the candidate is at.

Under the **Select Other Action** sub heading, Select to **Send Correspondence.**

Click **Apply and Proceed to Next Action.**

You can choose to send correspondence by 'Email' or by 'Printed Letter'.

You can select to write a message from scratch or use a template.

The send correspondence pop up is displayed with a selection of template letters. Click on the template you wish to use.

You will be now able to preview to the template paragraphs to ensure that you are selecting the correct template.

Click on the **Select Template** button at the bottom of the page.

Review the template and should you wish to make any amendments, these will need to be done at this point.

Click **apply and close.**

A send correspondence pop up will be displayed and this will highlight any errors or missing information which need to be completed on your template letters. Click **Review All.**

The names of the candidates that you have selected to send correspondence to in bulk will now appear on the left side of the screen.

You will notice that there are a number of errors against each candidate that need to be resolved. These errors can be resolved by completing the missing information tab. Complete with the required information and click the **Apply** button.

This information has now been populated on the first candidate correspondence; you will notice that there is now a tick beside the candidate name to confirm that all errors have been resolved.

To resolve the errors on the remaining candidates, click on their name, they will now highlighted in a dark shade of blue. Click **Apply** to complete the required information. You will need to continue with this process for all candidate that you have selected.

To preview each correspondence you can do this by clicking on the candidate's name.

Click the **Apply and Close** button to issue the correspondence.

You will return to the requisition candidate list were you will notice that the candidates Status has been updated to **Shortlisting – Rejected.**

To view the correspondence that you have just sent, click on the candidate name to access their profile and select the **History** tab.

The candidate history has been logged. Click on the blue hyperlink to view correspondence received by the candidate.

You will notice that the fields previously in curly brackets were populated in the correspondence received by the candidate.

When you are finished, click the **Close** button.

<u>Progressing a candidate</u>

You will want to progress candidates who have met all essential criteria and any desirable criteria that you have set and applied.

You can progress a candidate from the main candidate list of the requisition or from within their job submission page. The steps remain the same but are completed from different screens.

You can choose to schedule interviews or assessments:

- **<u>One by one</u>** by selecting only one candidate at a time,
- **<u>In bulk</u>** by selecting all candidates you are inviting to interview <u>per interview date</u>
- OR In bulk by selecting all candidates you are inviting to interview **<u>in total</u>**

If you select more than one candidate at a time to schedule an interview for, you **<u>must</u>** edit the invite letter for each candidate to update the date or time.

To progress a candidate from the main candidate list select the **check box** in the first column.

Click **More Actions,** from the drop down menu, click on **Change Step/status:**

To progress a candidate from the job submission page, click **More Actions** at the top of the job submission**,** from the drop down, click on **Change Step/status.**

Should you progress a candidate from their job submission page, you can only progress one candidate at a time as opposed to completing this task for several candidates at once.

Regardless of which screen you choose to do this from the '**Change Step and Status'** pop up is the same.

Click to display the drop down on the **change to** Status heading

Select **Progress to 1st Stage*** and click **Apply and Continue**. This will move the candidate to the next step of the workflow **– Stage 1 Interview/Assessment.**

Moving candidates through the candidate selection workflow will also allow candidates to track the progress of their submission when they log in to their candidate portal.

The pop up will reflect this new step and will have options for the New Status

To schedule your interviews at a later time, select **To be Scheduled** and click **Apply and Close**.

Alternatively, if you wish to proceed to schedule your interviews select **Scheduled** on the New Status list.

Under the **Select Other Action** sub heading, tick the checkbox to **Send Correspondence**:

Click **Apply and Proceed to Next Action** button.

The '**Send Correspondence**' pop up is displayed. You can choose to send correspondence by Email or by Printed Letter. **It is recommended that you send correspondence by Email.** Candidates have been advised that on completion of their application, all correspondence relating to their application will be sent via the email address they provided.

You can create an Invite to **Interview or Assessment** from scratch or from a template. Templates have been created in the system library for your ease; it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To access the library templates, click on the **templates** button and then click **next.**

The 'Template Selector' pop up will appear. Click on the template you wish to use, you will notice that this will be highlighted in a dark shade of blue.

You will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

You can use the filters to assist you with your search.

Click the **select template** button to continue.

A warning message will now be displayed to advise that there is missing information that needs to be completed on the interview letters. This missing information will be the actual interview details. Enter this information on the missing information pane and click **Apply.**

Should you wish to edit the template, click on the **Edit Message** button at the top of the screen.

You may wish to add attachments, insert a school logo or edit the email address the correspondence is being issued from.

Please note that the default email address is **"EA Resourcing Team"**

Click **Apply and Close** to issue the correspondence.

Sending Interview correspondence to more than one candidate at a time to interview/assessment stage

If you are selecting several candidates to invite to interview at one time. From the submission list, Select the **check box** in the first column for those candidates that you are inviting to interview.

Click **More Actions,** from the drop down, click on **Change Step/status:**

Click to display the drop down on the **change to** Status heading

Select **Progress to 1st Stage*** and click **Apply and Continue**. This will move the candidate to the next step of the workflow – Stage 1 Interview/Assessment.

The pop up will reflect this new step and will have options for the New Status

To schedule your interviews later, select **To be Scheduled** and click **Apply and Close**.

Alternatively, if you wish to proceed to schedule your interviews select **Scheduled** on the New Status list.

Under the **Select Other Action** sub heading, tick the checkbox to **Send Correspondence**:

Click **Apply and Proceed to Next Action** button.

The '**Send Correspondence'** pop up is displayed. You can choose to send correspondence by Email or by Printed Letter. **It is recommended that you send correspondence by Email.** Candidates have been advised that on completion of their application, all correspondence relating to their application will be sent via the email address they provided.

You can create an Invite to **Interview or Assessment** from scratch or from a template. Templates have been created in the system library for your ease; it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To access the library templates, click on the **templates** button and then click **next.**

The ‘Template Selector’ pop up will appear. Click on the template you wish to use, you will notice that this will be highlighted in a dark shade of blue.

You will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

You can use the filters to assist you with your search.

Click the **select template** button to continue.

The template will now open in an editable format. Make amendments as necessary and then click on the **Apply and Continue** button to continue.

A warning pop up will now be displayed to advise that there is missing information which needs to be completed on the interview letters. This missing information will be the actual interview details. To input this information, click **Review all.**

The next page within the pop up enables you to complete the missing information and tailor the correspondence for each candidate. These missing information fields may vary depending on the correspondence template you have selected to use.

Enter the interview details within the **missing information** pane.

If you initially selected multiple candidates to **invite to interview**, enter the interview details for the first candidate, only leaving out the **interview time** field. You can update each candidate’s interview time before sending the invite. This action will populate the information on all candidate invites and ensure you do not invite candidates to attend for interview at the same time.

When you have completed the missing information fields, click **Apply**. The missing information that you have entered will now be displayed in the correspondence for your review. .

Click on the next candidate and you will notice that the missing information fields will be populated with the information that you entered for the 1st candidate. To apply this information to the template, click the **apply** button. Continue this action for all candidate in your list.

You will now notice that each candidate will have one error on their template. This will be the **interview time.** To populate this information for each candidate, click on the candidate name and enter the interview time that corresponds with your interview schedule. Click **Apply** to add this missing information to each of your candidates invite to interview letter.

If you need to edit a candidates correspondence, click on candidate name and then click the **Edit Message** button on the top right of the pop up. The correspondence will then open in an editable format. You will now be able to make amendments. However, **please note** that this will only edit individual letters and if amendments are applicable to each candidate, this action will need to be repeated for all candidate correspondence.

Ensure that there are no errors on the correspondence as this may prevent your correspondence from saving or sending.

To preview each candidate correspondence before sending, click on each candidate's name

Click **Apply and Close.** If you are sending more than one invite to interview correspondence, you will notice that there will be a number identifying the total correspondence you are about to issue in brackets on this button.

You will return to the requisition candidate list were you will notice that the **candidates Step and Status** has been updated to **Stage 1 interview/Assessment – Scheduled:**

To view the correspondence that you have just sent, click on the candidate name to access their profile:

From this screen, select the **History** tab. This will display all system history for this candidate. Links in blue are hyperlinks which, when clicked, enable you to view correspondences as received by the candidate:

When you are finished with this pop up. Click the **Close** button.

Inviting a candidate to a further interview/assessment

The action taken to progress a candidate to another **interview or assessment** is mostly the same as previously detailed. The main difference is the different **step and status** you will use.

Select the relevant candidates, click **More Actions**, from the drop down, click **Change Step/status**.

The **'Change Step and Status'** pop up will be displayed. Ensure that the **Change To** Status is updated to **Progress to 2nd Stage** and click **Apply and Continue**:

You will now land on a new step, **'Stage 2 Interview or Assessment'**. Ensure that the new status is updated to **Scheduled** and tick the check box to **Send Correspondence.**

Repeat the same steps outlined as before to issue the invite to **interview or assessment** to your selected candidates.

Copy the steps as before to schedule **a third interview or assessment**. This can only be completed if the '**Detailed Candidate Selection Workflow'** was selected on the initial requisition prior to advertisement.

Again, the main difference is the step and status you will use. You will need to select **Progress to 3rd stage** to land on the **'Stage 3 Interview or Assessment'** step and from there you can schedule a further interview, issuing correspondence as outline before.

Reverting a step

If you have accidentally moved a candidate to the wrong Step or Status, you will want to revert this action. To do this, select the candidate that has been moved in error, click **More Actions** and select the **Revert latest change to step/status** from the drop down menu:

The '**Revert the latest change of step/status'** pop up appears

Provide a reason for reverting the action in the comments box and click **Revert and Close.** If you need to revert a candidate by more than one Step/Status at a time, click **Revert and Continue** instead.

If you click **Revert and Continue** and there is a further Step/Status to revert, the system will now display this in the pop up. Follow the same process of providing relevant details in the comments box and click either of the Revert buttons.

If you have clicked **Revert and Continue** in error instead of **Revert and Close**, simply click the **Cancel** button to leave the pop up and no further action will be taken.

Tip: If you have reverted a step/status that originally issued correspondence to a candidate, you may need to take corrective action.

For example, If you moved a candidate to '**Rejected**' in error and have issued correspondence to the candidate informing them of this, you will need to follow up with the candidate and advise them of the error.

Re-issuing correspondence

In the event that you need to re-issue correspondence to a candidate, you can do this by accessing the candidate's submission and clicking on the History Tab.

Links in blue are hyperlinks which, when clicked, enable you to view the correspondences issued and resend if necessary.

Key point

It is recommended that all candidate correspondence is issued via the online recruitment system and not from users work or personal email address so that it can be tracked in the History tab and can be accessed or relied on at a later date if necessary