



Web Recruitment Release 4, January 2015

Managing Offers

HR Systems



Contents

1. INTRODUCTION.....	2
1.1 OVERVIEW OF RECRUITMENT-RELATED SYSTEMS AND WEB RECRUITMENT RELEASES 1 -3	2
1.2 RELEASE 4 OVERVIEW.....	3
1.3 HR SYSTEM LINKAGES.....	4
1.4 SYSTEM SUPPORT	4
2. WEB RECRUITMENT – AVAILABLE DOCUMENTATION	5
3. SELECTING A SUCCESSFUL CANDIDATE TO MOVE TO OFFER STAGE	6
4. STEP ONE - CONFIRMING THE OFFER POSITION	9
5. STEP TWO - RECORDING OFFER DETAILS.....	14
5.1 ENTERING KEY DATES FOR THE OFFER.....	15
5.2 ENTERING HOURS AND WORK PATTERNS	21
5.3 ENTERING PAY AND OTHER REMUNERATION DETAILS	25
5.4 RECORDING THE PRINCIPAL PLACE OF WORK	34
5.5 ENTERING/CONFIRMING SCREENING CHECKS.....	35
5.6 CONFIRMING OFFER DETAILS.....	38
6. STEP THREE - MANAGE OFFER LETTER.....	41
6.1 CHOOSING THE TYPE OF OFFER LETTER	41
6.2 CREATING A SYSTEM-GENERATED LETTER	41
6.2.1 ENTERING APPLICANT AND POSITION DETAILS.....	42
6.2.2 ENTERING UNIVERSITY CONTACT DETAILS.....	43
6.2.3 ENTERING EXTRA CLAUSES	45
6.2.4 SENDING THE SYSTEM-GENERATED OFFER LETTER	47
6.3 RECORDING THAT A MANUALLY CONSTRUCTED OFFER LETTER HAS BEEN SENT	52
7. STEP FOUR - RECORDING THE OUTCOME OF THE OFFER.....	55
8. STEP FIVE - CONFIRMING THE COS DETAILS	57
9. STEP SIX - APPOINTMENT REQUEST	59
9.1 ENTERING THE POSITION DETAILS.....	59
9.2 ENTERING CLINICAL ROLE DETAILS	62
9.3 ENTERING COSTING DETAILS	65
9.4 ADDING DETAILS OF SUPPORTING DOCUMENTS.....	68
9.5 SUBMITTING AN APPOINTMENT REQUEST	73
10. VIEWING OFFER HISTORY	81
11. SEARCHING FOR AN OFFER	82
12. EXCEPTIONS TO THE ‘STANDARD’ PROCESS	84
12.1 UNDER-APPOINTMENTS: RESEARCH ASSISTANT/RESEARCH ASSOCIATE.....	84
12.2 APPOINTMENTS STILL REQUIRING A CHRIS/10 OR CHRIS/10A APPOINTMENT FORM.....	85
12.3 SITUATIONS REQUIRING A MANUAL OFFER LETTER.....	85

1. Introduction

1.1 Overview of recruitment-related systems and Web Recruitment Releases 1 -3

The recruitment process begins with the identification and definition of a vacancy. This includes developing or updating the PD33 or role description and, for new academic-related and assistant staff vacancies, the grading of the post. Posts which are graded are set up in CHRIS (the HR and Payroll System) by the Grading team in the HR Division.

The new Recruitment Administration System (RAS) is then used to:

- Find the details of a vacancy which exists in CHRIS (posts which have been graded or are being refilled); or
- Enter the vacancy details for a new academic or research post (these are not individually graded so have not already been set up in CHRIS at this point).

Permission to fill a vacancy is then requested and granted in RAS.

In most cases, the vacancy should be advertised. Once all required permissions for a vacancy have been obtained, RAS can be used to place an advert on the University's Job Opportunities pages and to send to external media for publication.

In RAS, a department/institution records whether or not they will be inviting online job applications via the Web Recruitment System. Where the Web Recruitment System is to be used, RAS will:

- Insert an 'Apply online' button on the advert for the vacancy on the Job Opportunities pages;
- Insert a URL in external adverts for the vacancy, which routes to the relevant advert on Job Opportunities.

The Web Recruitment System can then be used to receive and process applications received.

The first release of the Web Recruitment System focused on:

- Allowing applicants to apply online via the University Job Opportunities pages;
- Automatically acknowledging applications;
- Allowing recruiters to view, email and print applications;
- Allowing recruiters/administrators to manage and record the results of the selection process; and
- Transferring the successful applicant(s) into the CHRIS Recruitment Module.

The second release of the Web Recruitment System focused on:

- Allowing applicants to copy personal details, qualifications and employment history from a previous application;
- Allowing recruiters to generate rejection emails and letters to applicants;
- Allowing recruiters to generate reference request emails and letters;
- Allowing referees to upload their reference into the system after a reference request email has been sent to them.

The third release of the Web Recruitment System focused on:

- Allowing recruiters to generate an email to the successful applicant where they need to provide information for a Tier 2 Certificate of Sponsorship;

- Allowing applicants to log back into their Web Recruitment account to enter the additional Tier 2 CoS information and upload supporting documents;
- Allowing recruiters to download the applicant details required for a Tier 2 CoS so that it can be attached to the rest of the CoS application for submission to HR;
- Automated marking of an application as eligible for purging 12 months after the vacancy closes (including extended deletion dates for those vacancies where CoS retention policies apply);
- Allowing super-users to mark a vacancy as a purging exception;
- Automated deletion of unsubmitted applications two months after the vacancy closing date;
- Retaining anonymised data for future trend analysis and management reporting;
- Allowing applicants to enter basic disclosure information when a vacancy has a basic disclosure check selected within new RAS;
- Generating reports of applicant information from within Web Recruitment and export results to Excel; and
- Adding bookmarks to the application pack PDF, allowing recruiters to navigate around more easily between applicants and documents.

1.2 Release 4 overview

Release 4 focuses on:

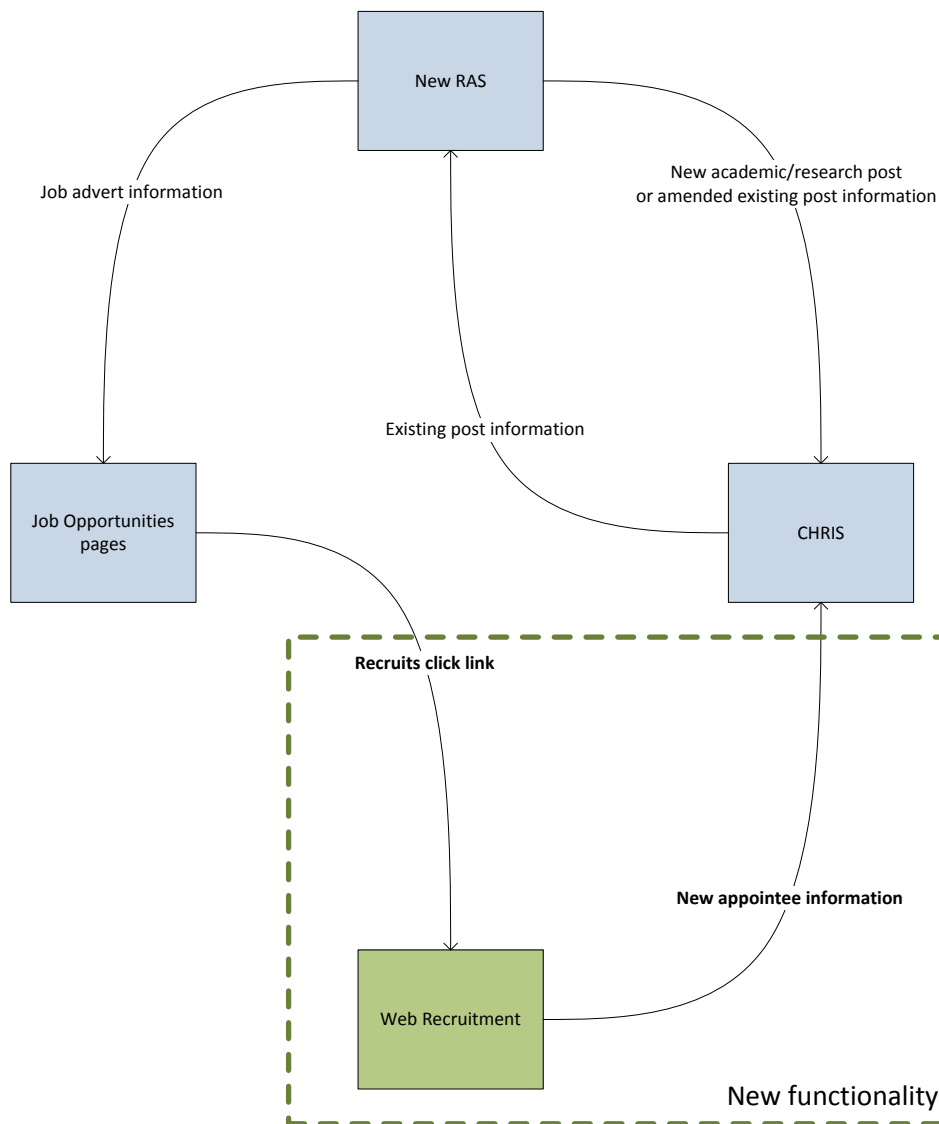
- Removing the need for vacancy administrators in departments/institutions to use the CHRIS Recruitment Module and CHRIS/10A form for the majority of appointments and replacing these with the following actions doing the following within Web Recruitment:
 - Recording details about the offer and appointment within a new Offers section;
 - Uploading supporting documents for an appointment (and Tier 2 Certificate of Sponsorship application, if required); and
 - Submitting an electronic Appointment Request to the HR New Appointment team.
- Pre-filling the Offers section with details about the applicant (from their online application form) and the position (from CHRIS);
- Allowing vacancy administrators to generate an offer letter to the successful candidate using details that they have entered into the system or upload an offer letter they have created outside of the system;
- Allowing vacancy administrators to download a cover sheet for any supporting documents being sent to the HR New Appointment Team outside of the system;
- Recording details of how and when offer letters were sent to the successful candidate;
- Storing and accessing offer letter history;
- Allowing the New Appointment Team to receive and view appointment requests online within a new HR Processing section of the system; and
- Allowing the New Appointments team to transfer details of the applicant and appointment into the CHRIS Recruitment Module.

Departments/institutions should request appointments via Web Recruitment wherever possible and the New Appointment team will transfer successful applicants to CHRIS using their screens within the system. The supporting documents cover sheet can then be downloaded and attached to supporting documents and returned to the HR New Appointment Team for processing.

1.3 HR system linkages

Diagram 1 below shows how the different HR systems link together in the recruitment process.

Diagram 1: HR systems linkages in the recruitment process



1.4 System support

Technical queries relating to the Web Recruitment System should be directed to the **CHRIS Helpdesk** by emailing chris.helpdesk@admin.cam.ac.uk. The New Appointment Team should be contacted for advice about making appointments via hnewappointmentteam@admin.cam.ac.uk.

2. Web Recruitment – Available Documentation

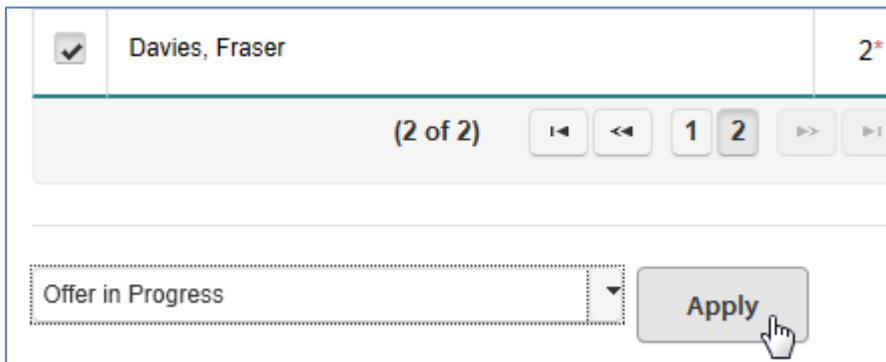
This manual (shaded in grey below) forms part of the wider set of documentation for Web Recruitment summarised in the table. These documents can be found on the HR Systems Web Pages (found at <http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/web-recruitment-system>), along with additional supporting information (including links to videos and release notifications).

Title	Document Type	Description
Guide for Selectors	User guide	A guide designed for selectors that describes the process of logging on to Web Recruitment, viewing and downloading application packs.
Managing Vacancies	User guide	This is the main user guide, which explains how to find vacancies in the system, grant other access, download application forms, record outcomes at each stage of selection and complete recruitment so that the appropriate retention policy is applied to the details of the vacancy.
Tier 2 Certificate of Sponsorship – Requesting Applicant Details	Quick reference	This is a two page pictorial overview of the end-to-end process for requesting information from a successful applicant for a Tier 2 Certificate of Sponsorship (CoS) application. It is intended for users who do not require the level of detail in the step-by-step instructions in the guide below.
Tier 2 Certificate of Sponsorship – Requesting Applicant Details	User guide	This guide provides detailed step-by-step instructions on how to request that a successful applicant logs back into their Web Recruitment account to provide information and supporting documents needed for a Tier 2 CoS application.
Generating Correspondence	User guide	This guide explains how to generate rejection emails/letters and reference request emails/letters within the system. It also details how to view references uploaded directly into the system by referees and how to upload references received by post/email.
Generating Reports	User guide	The Web Recruitment system provides standard vacancy reports for applicant and referee details (for example, for use in mail merges or for email lists). This document describes the standard reports and how to generate them. It also describes how to use the custom reporting tool built into the application.
Managing Offers	Quick reference	This is a two page pictorial overview of the end-to-end offer and appointment process. It is intended for users who do not require the level of detail provided by the step-by-step instructions in the user guide below.
Managing Offers	User guide	This guide describes the process of making an offer, generating an offer letter, recording offer outcomes and entering additional information so that an electronic appointment request can be made to the HR New Appointment team. This process replaces the need for departments/institutions to use the CHRIS Recruitment Module and CHRIS 10(A) form for most appointments. The guide also provides a summary of how to request Tier 2 CoS information; full details are in the CoS guide.
Overview of the Applicant Process	User guide	A guide for internal users of the Web Recruitment System that describes the process of making an online application from the applicant's perspective.
Applicant Frequently Asked Questions (FAQs)	FAQs	This document details common queries from applicants that have been reported through the CHRIS Helpdesk, in the applicant survey and to vacancy contacts within departments/institutions.
Administrator Frequently Asked Questions (FAQs)	FAQs	This document details common queries from recruiters, selectors and vacancy administrators reported through the CHRIS Helpdesk, in the department/institution benefits survey and system demonstrations.
Processing Appointment Requests	User guide	This guide is for the HR New Appointment team and describes how to find, check and process Appointment Requests from departments/institutions.

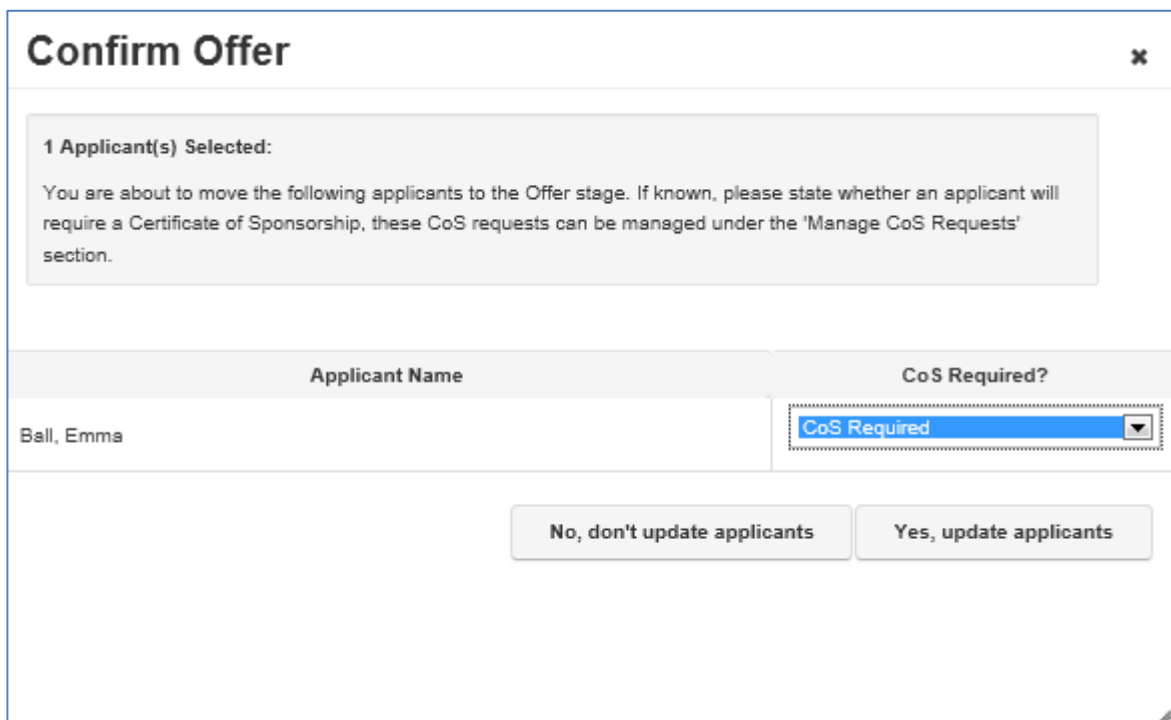
3. Selecting a Successful Candidate to Move to Offer Stage

When the selection process for the vacancy has been completed and a preferred candidate has been selected, you must move him/her (or them, if you have more than one preferred candidate) to the **Offer in Progress** stage.

1. Tick the successful candidate(s), select the **Offer in progress** status and click on the **Apply** button.



2. The following **Confirm Offer** dialog box will then appear:



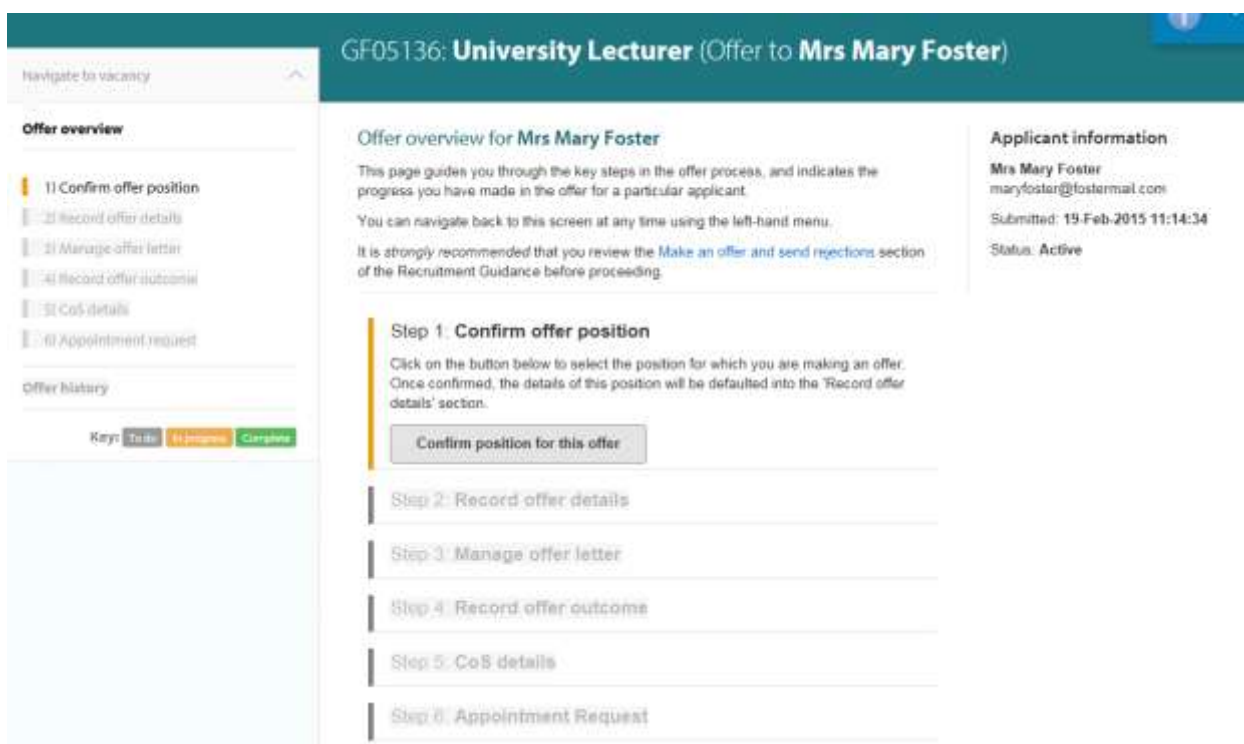
The confirmation window will indicate whether a CoS may be needed by the successful applicant based on his/her responses to right to work questions in his/her application form. However, you must double-check the successful applicant's right to work status with him/her once he/she has been selected and establish if he/she needs a Tier 2 CoS.

- As required, you can amend the default option by selecting from the drop-down list. Once you have made any changes and you wish to move the successful applicant to the Offer stage, click on the **Yes, update applicants** button.



Please note: you must state that a CoS is required even if you do not intend to use the Web Recruitment system to ask the applicant for additional information required for a Tier 2 CoS. When you select **CoS Required** the applicant will NOT be contacted unless you later confirm the request. You will have the opportunity to confirm or change your mind during Offers Step 5 which will take you through the CoS process.

- You will then be taken directly into the **Offer overview** screen for the applicant you selected.



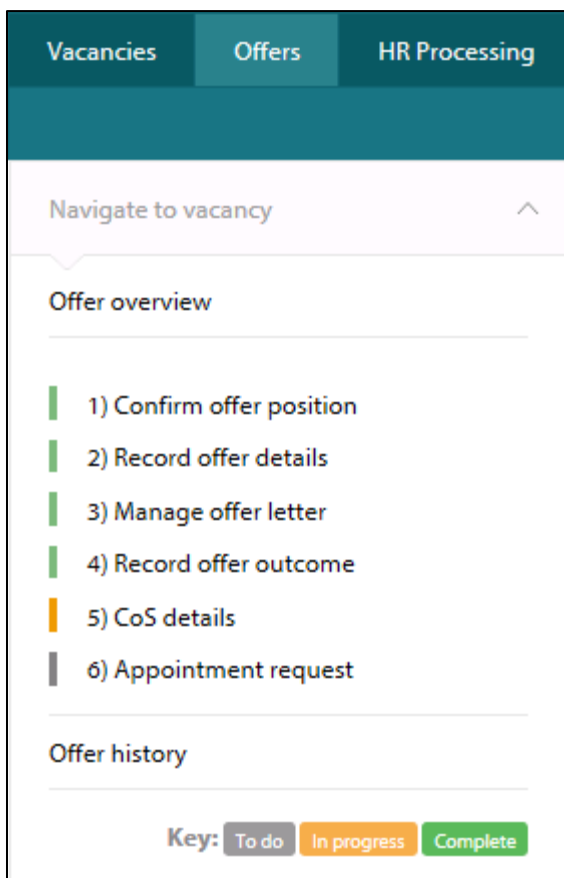
The screenshot shows the 'Offer overview' screen for 'GF05136: University Lecturer (Offer to Mrs Mary Foster)'. The interface includes a left-hand menu with six steps: 1) Confirm offer position (highlighted in orange), 2) Record offer details, 3) Manage offer letter, 4) Record offer outcome, 5) CoS details, and 6) Appointment request. A 'Key' at the bottom of the menu indicates 'Status' (orange), 'In progress' (yellow), and 'Complete' (green). The main content area shows 'Offer overview for Mrs Mary Foster' with a 'Confirm position for this offer' button. A progress bar below the main content shows the status of each step: Step 1 is active (orange), Step 2 is complete (green), and Steps 3-6 are left to do (grey).

This page guides you through the six main steps in the offer and appointment process. The steps are shown within the main section of the screen and in the left-hand menu. You can click on the step you need to work on in either place.

The colour key next to each step provides a quick summary of your progress, showing you which step you are on, which you have completed and which you have left to do.



You will be routed back to the Offer overview screen every time you complete a step to help you keep track of where you are in the process.



The screenshot shows a web interface with three tabs: 'Vacancies', 'Offers', and 'HR Processing'. The 'Offers' tab is active. Below the tabs is a search bar labeled 'Navigate to vacancy' with an upward arrow. The main content area is titled 'Offer overview' and contains a list of six steps:

- 1) Confirm offer position
- 2) Record offer details
- 3) Manage offer letter
- 4) Record offer outcome
- 5) CoS details
- 6) Appointment request

Each step is preceded by a vertical bar. Steps 1-4 have green bars, step 5 has an orange bar, and step 6 has a grey bar. Below the list is a section titled 'Offer history'. At the bottom, a 'Key:' section defines the bar colors: 'To do' (grey), 'In progress' (orange), and 'Complete' (green).

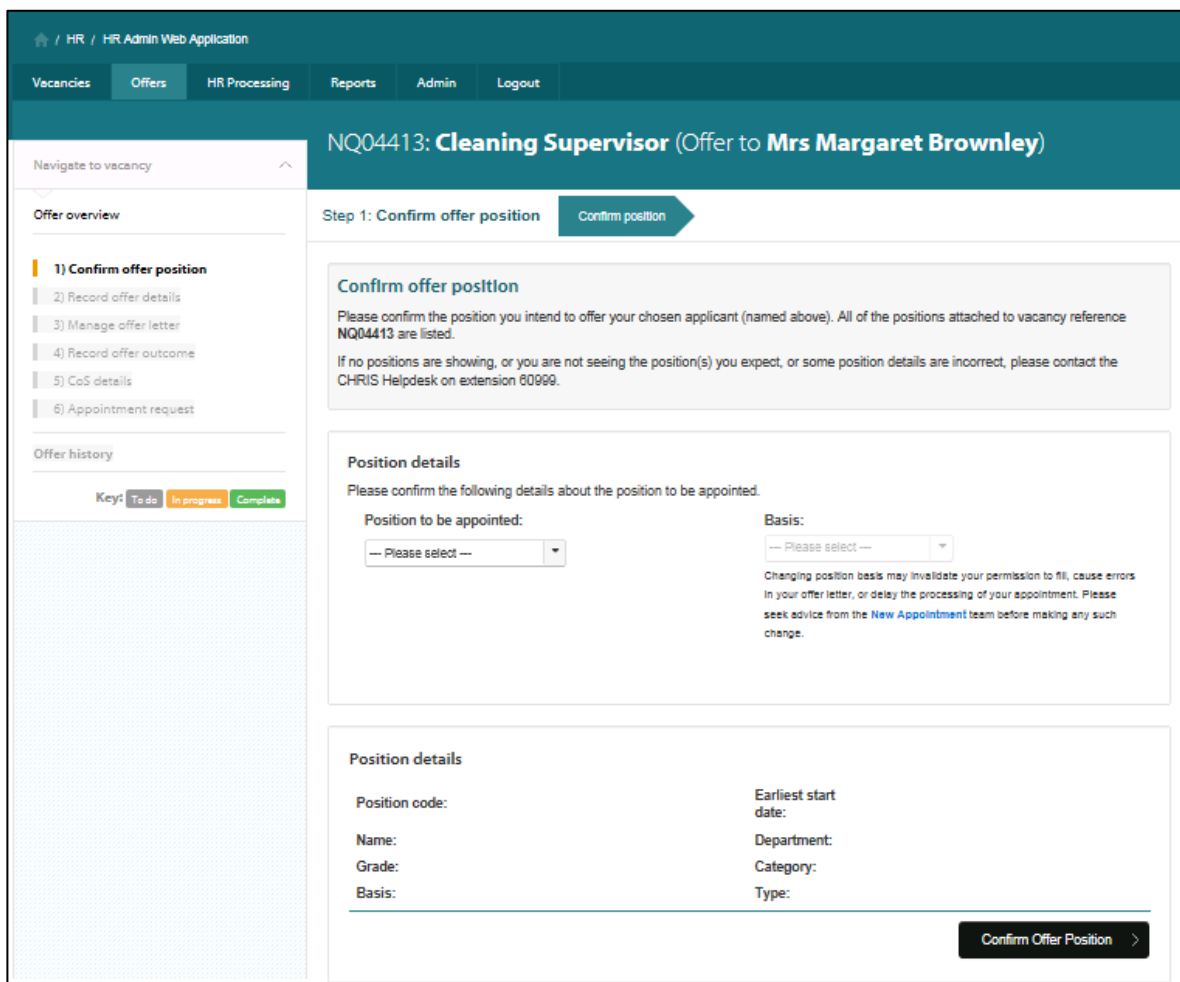
The following sections of this guide describe each of the six steps in the offers process in detail.

4. Step One - Confirming the Offer Position

1. Click on the **Confirm position for this offer** button on the Offer overview screen.



2. The following screen will be displayed:



The screenshot shows the 'HR Admin Web Application' interface. The main header displays 'NQ04413: Cleaning Supervisor (Offer to Mrs Margaret Brownley)'. The left sidebar contains a navigation menu with 'Offer overview' selected, showing a list of steps: 1) Confirm offer position (active), 2) Record offer details, 3) Manage offer letter, 4) Record offer outcome, 5) CoS details, and 6) Appointment request. Below the menu is an 'Offer history' section with a key for 'To do', 'In progress', and 'Complete'. The main content area is titled 'Step 1: Confirm offer position' and includes a 'Confirm position' button. The 'Confirm offer position' section contains instructions: 'Please confirm the position you intend to offer your chosen applicant (named above). All of the positions attached to vacancy reference NQ04413 are listed. If no positions are showing, or you are not seeing the position(s) you expect, or some position details are incorrect, please contact the CHRIS Helpdesk on extension 80999.' Below this is a 'Position details' section with the instruction 'Please confirm the following details about the position to be appointed.' It features two dropdown menus: 'Position to be appointed:' and 'Basis:'. A warning note states: 'Changing position basis may invalidate your permission to fill, cause errors in your offer letter, or delay the processing of your appointment. Please seek advice from the New Appointment team before making any such change.' At the bottom, there is a table of position details with fields for Position code, Name, Grade, Basis, Earliest start date, Department, Category, and Type. A 'Confirm Offer Position' button is located at the bottom right of the form.

In most cases there will only be one position associated with the vacancy. Where this is the case, this position will already be selected and shown on-screen.

In some cases, for example, if you were seeking permission to fill multiple identical vacancies and used the 'Number of vacancies' field on Step 1 in the Recruitment Administration System (RAS), there will be a corresponding number of positions for the vacancy in CHRIS and Web

Recruitment. In these situations, you will need to select the correct position from the drop down list.




4. The position details for the selected position will now be displayed on the screen.

Position details

Position code:	44113	Earliest start date:	26-Feb-2015
Name:	Cleaning Supervisor	Department:	Department of Chemical Engineering and Biotechnology
Grade:		Category:	Cleaner
Basis:	Assistant	Type:	Assistant M

Position **basis** will be defaulted based on information held in CHRIS.

Basis:



Valid options for basis are shown in the table below:

Staff Group(s)	Basis
Assistant	Assistant
Research	Unestablished
Unestablished academic and unestablished academic-related	Unestablished
Established academic and established academic-related	Established – one tenure OR Established permanent



Please note: You should not make **any** change to basis in Web Recruitment without seeking advice from the New Appointment Team first as a change may invalidate your permission to fill, cause errors in your offer letter, or delay the processing of your appointment.

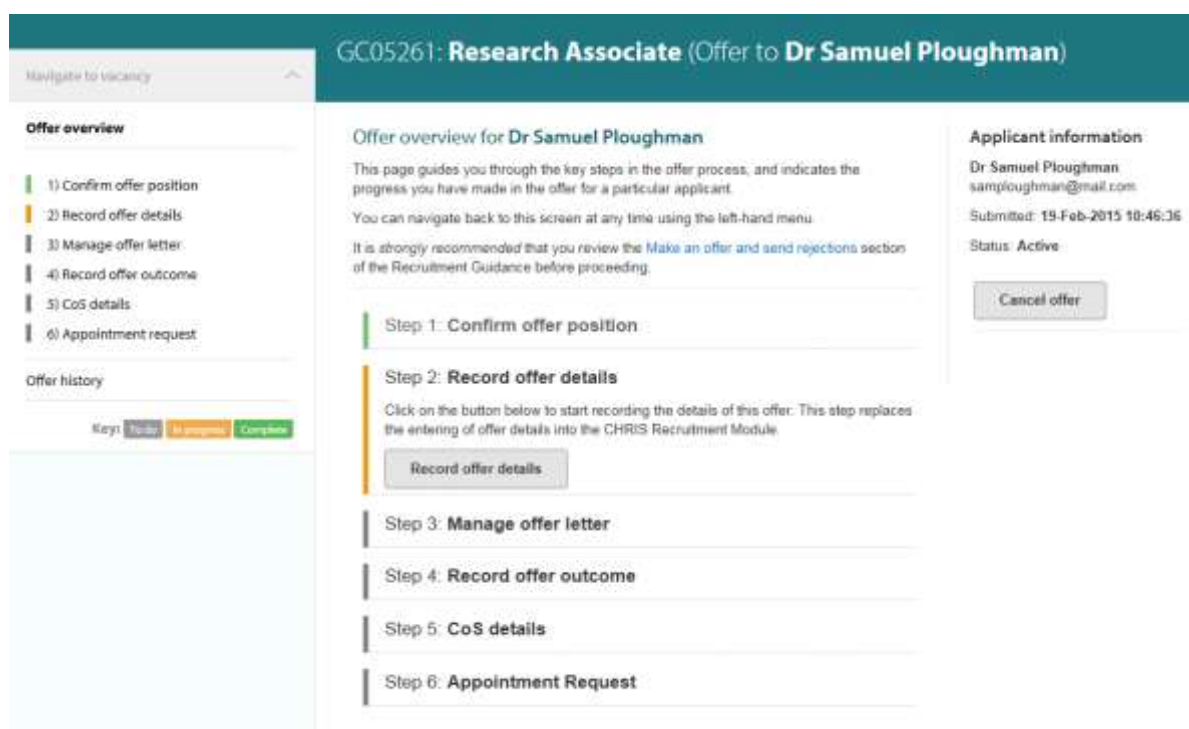
Where it is possible to under-appoint a person to a Research Assistant position pending award of their PhD and appointment to Research Associate, there will be an option on-screen for you to be able to confirm whether or not you will be making an under-appointment. Full details are found in section 12.1.

5. Once you have checked that you have selected the right position and you are satisfied that the details are correct, click on the **Confirm Offer Position** button.



Please note: speak with the New Appointment Team if you believe any of the position details are incorrect.

6. After confirming the position, you will be routed back to the **Offer overview** screen, ready for you to commence Step 2 (by clicking on the **Record offer details** button) when you are ready.



The screenshot displays the 'Offer overview' screen for a specific offer. The header shows the offer ID 'GC05261: Research Associate (Offer to Dr Samuel Ploughman)'. On the left, a navigation menu lists six steps: 1) Confirm offer position (active), 2) Record offer details, 3) Manage offer letter, 4) Record offer outcome, 5) CoS details, and 6) Appointment request. The main content area provides an overview of the offer process, including a 'Record offer details' button. The right sidebar shows applicant information for Dr Samuel Ploughman, including his email, submission date, and status (Active), along with a 'Cancel offer' button.

7. Before you have submitted an Appointment Request to the New Appointment Team, you can go back and modify the offer details, including switching to a different position.
 - a) You can change the position for the offer by going back to the **Offer overview** screen. Click on **Step 1 Confirm offer position**.

Step 1: Confirm offer position

- b) Click on the **Change Position Details** button and you will be asked to select a new position.

AH04398: Clerk (Offer to Miss Margaret Brownhurst)

Step 1: Confirm offer position
Confirm position

Confirm offer position

Please confirm the position you intend to offer your chosen applicant (named above). All of the positions attached to vacancy reference AH04398 are listed.

If no positions are showing, or you are not seeing the position(s) you expect, or some position details are incorrect, please contact the CHRIS Helpdesk on extension 60999.

Offer position

This offer is currently for position 70033370 (Clerk) with position basis Assistant. If this is incorrect then please change it below.

Please note: No other details of this offer will be changed; you must ensure that all details remain valid for the newly selected one.

Change Position Details

c) Select the position that you require and then click on **Confirm offer position**.

Position details

Please confirm the following details about the position to be appointed.

<p>Position to be appointed:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> -- Please select -- </div> <div style="border: 1px solid #ccc; padding: 2px;"> -- Please select -- 70033369: Clerk 70033370: Clerk 70033371: Clerk 70033374: Clerk 70033376: Clerk </div>	<p>Basis:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> -- Please select -- </div> <p><small>Changing position basis may invalidate your permission to fill, cause errors in your offer letter, or delay the processing of your appointment. Please seek advice from the New Appointment team before making any such change.</small></p>
--	--

Position details

Position code:	Earliest start date:
Name:	Department:
Grade:	Category:
Basis:	Type:

Confirm Offer Position >

d) The offer will be attached to the new position.

Offer position

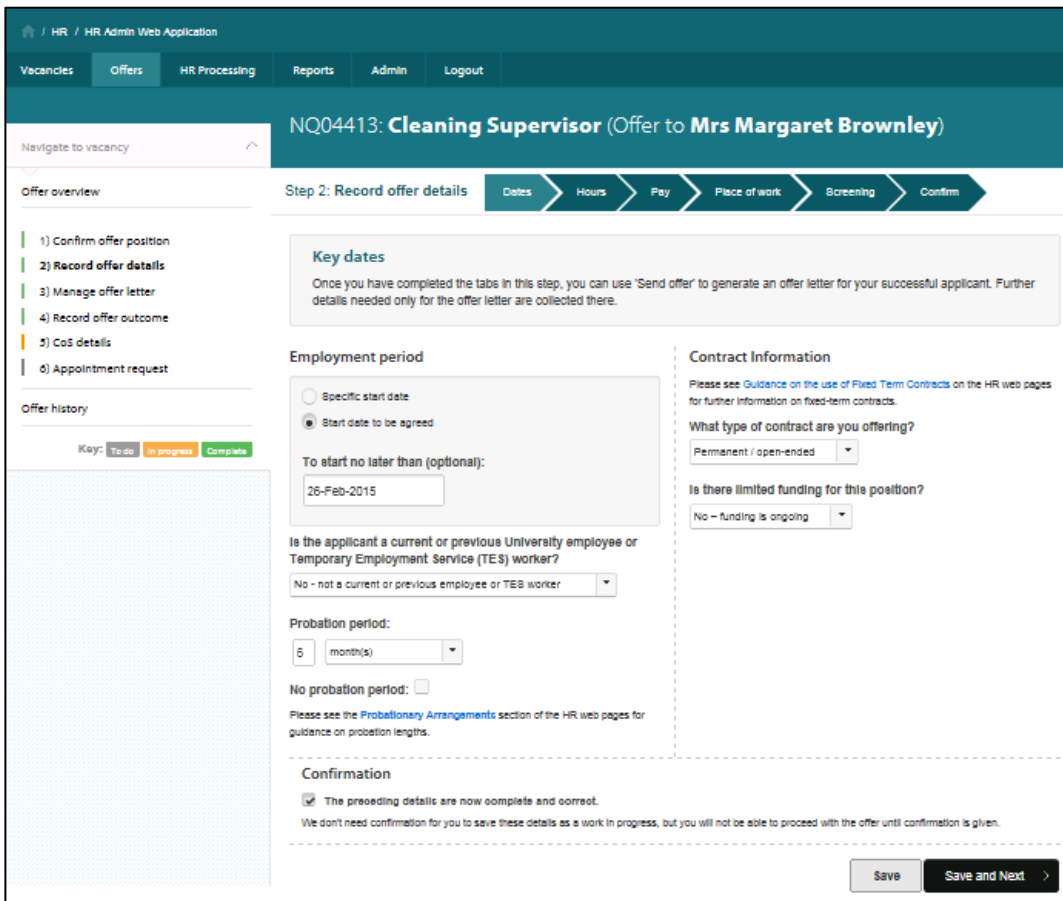
This offer is currently for position 70033376 (Clerk) with position basis Assistant. If this is incorrect then please change it below.

Please note: No other details of this offer will be changed; you must ensure that all details remain valid for the newly selected one.

The previous position will now be detached from the offer and will appear on the list of available positions for any future offers for the vacancy.

5. Step Two - Recording Offer Details

Once you have clicked on Step 2 **Record offer details**, you will see the below screen for the applicant and position that you have selected.



The screenshot shows the HR Admin Web Application interface. At the top, there is a navigation bar with tabs for Vacancies, Offers, HR Processing, Reports, Admin, and Logout. The main header displays the vacancy reference 'NQ04413: Cleaning Supervisor (Offer to Mrs Margaret Brownley)'. Below this is a progress bar with steps: Dates, Hours, Pay, Place of work, Screening, and Confirm. The current step is 'Step 2: Record offer details'. On the left, there is a sidebar with 'Offer overview' and 'Offer history'. The main content area contains several sections: 'Key dates' with a note about generating an offer letter; 'Employment period' with radio buttons for 'Specific start date' and 'Start date to be agreed', a date input field set to '26-Feb-2015', and a dropdown for 'To start no later than (optional)'; a question about whether the applicant is a current or previous University employee or Temporary Employment Service (TES) worker; a 'Probation period' dropdown set to '6 month(s)'; and a 'Confirmation' section with a checked checkbox 'The preceding details are now complete and correct'. At the bottom right, there are 'Save' and 'Save and Next' buttons.

The vacancy reference, description and applicant are displayed at the top of the tab.

NQ04413: **Cleaning Supervisor** (Offer to **Mrs Margaret Brownley**)

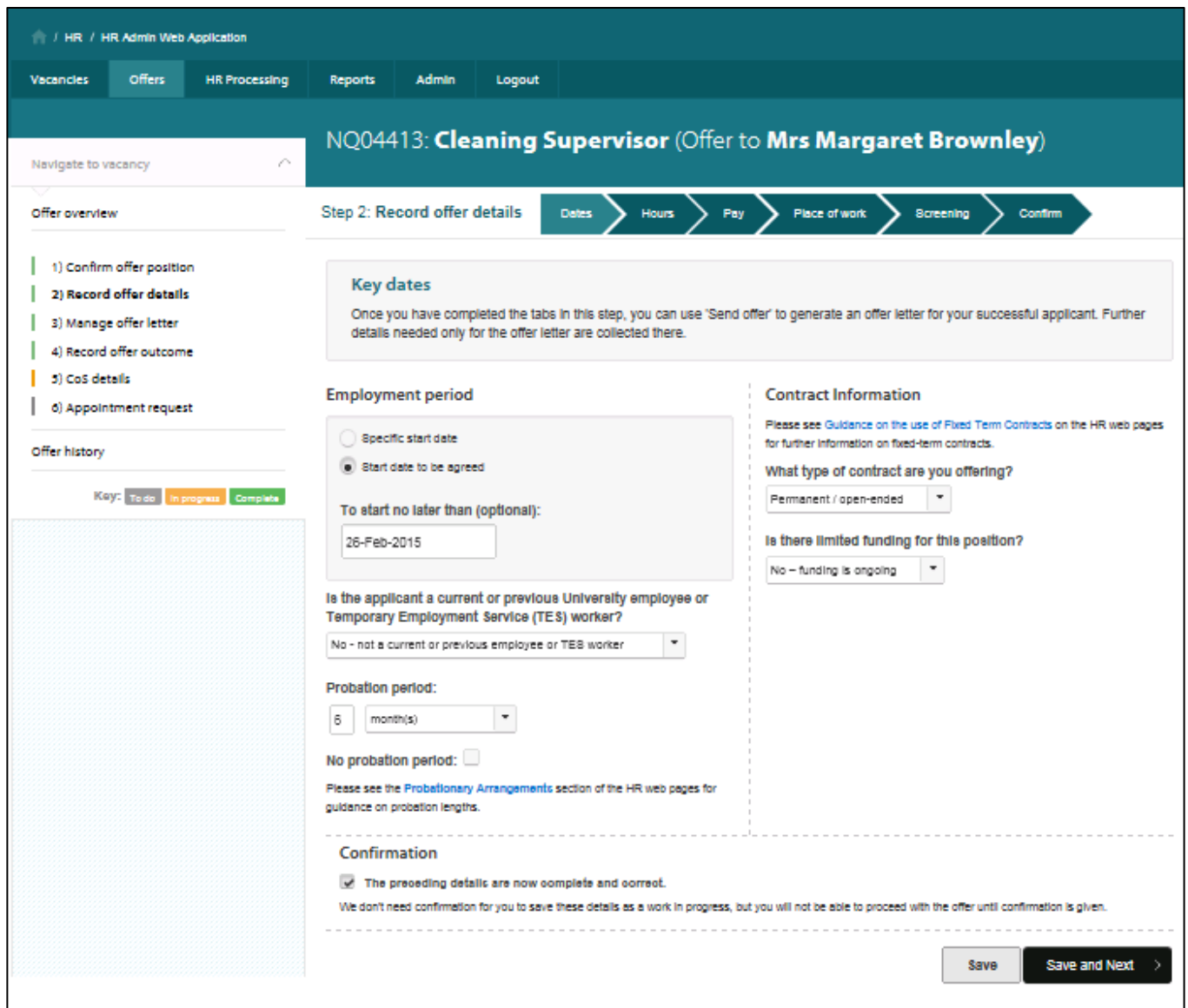
Underneath this is a 'breadcrumb' trail of the data that needs to be checked, entered or confirmed in this step of the process:



The breadcrumb trail consists of a series of chevron-shaped buttons. The first button is 'Step 2: Record offer details' and is highlighted. The subsequent buttons are 'Dates', 'Hours', 'Pay', 'Place of work', 'Screening', and 'Confirm', each pointing to the right.

5.1 Entering key dates for the offer

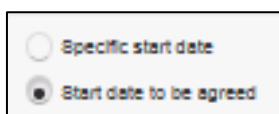
The first tab that will be displayed is the **Dates** tab:



The screenshot shows the 'Dates' tab in the 'Step 2: Record offer details' section. The 'Key dates' section contains the following information:

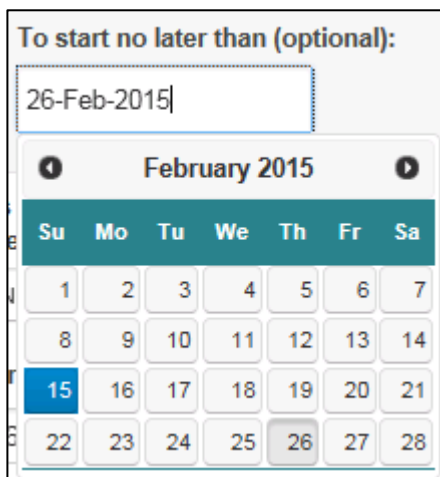
- Employment period:**
 - Specific start date
 - Start date to be agreed
 - To start no later than (optional): 26-Feb-2015
- Contract Information:**
 - What type of contract are you offering? Permanent / open-ended
 - Is there limited funding for this position? No - funding is ongoing
- Confirmation:**
 - The preceding details are now complete and correct.

1. Click on **'Specific start date'** if one has been agreed or **'Start date to be agreed'** if not.



Specific start date
 Start date to be agreed

- If a specific date has been agreed, or if you have a latest date by which you require the successful applicant to commence work, you can enter this in the **Start date** or **To start no later than** field using the date picker.



To start no later than (optional):
26-Feb-2015

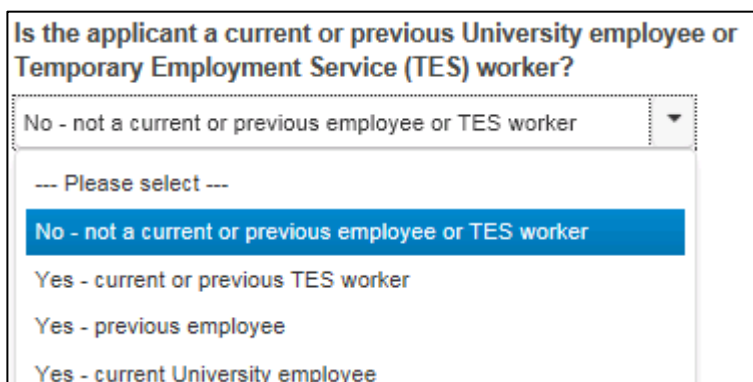
February 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28



Please note: if you do enter a select a date in the **To start no later than** field, this will be included in any system-generated offer letter that you create (it will say 'To be agreed, but no later than [date]' in the start date section).

- Provide information about the successful applicant's University employment/work history, using the drop-down provided.



Is the applicant a current or previous University employee or Temporary Employment Service (TES) worker?

No - not a current or previous employee or TES worker

--- Please select ---

No - not a current or previous employee or TES worker

Yes - current or previous TES worker

Yes - previous employee

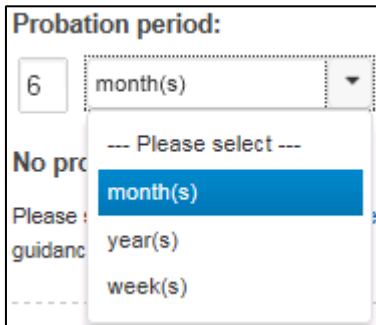
Yes - current University employee



Please note: it is important that you provide accurate information in response to this question and that you check the applicant's job application form or CV if you are not sure. If you answer incorrectly, other aspects of the offer process may not work correctly and the New Appointment team may inadvertently create a new person record in CHRIS where one already exists.

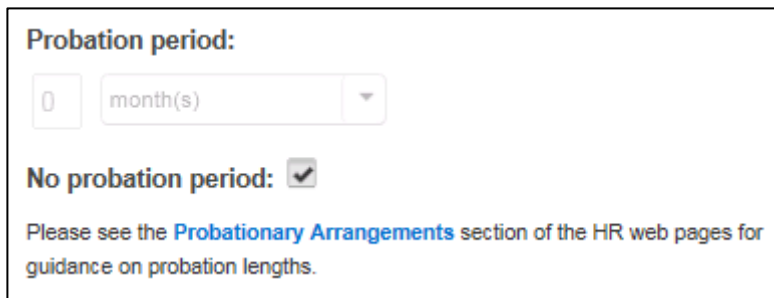
- The **probation period** will have been defaulted from the position in CHRIS (where this is available).

If you need to enter or change the value (in accordance with the University's [Probationary Arrangements](#)), type in a numeric value (e.g. '6') then select a period from the drop list.



Probation period:
 6 month(s)
 --- Please select ---
 month(s)
 year(s)
 week(s)

Alternatively, in exceptional cases where there is no probation period, you can indicate this by ticking the check box.



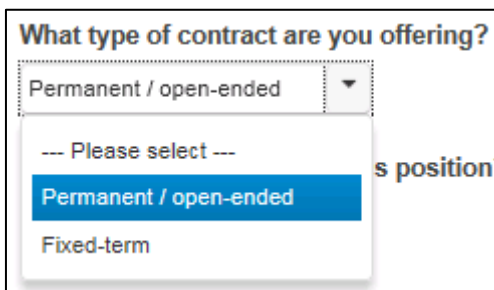
Probation period:
 0 month(s)
No probation period:
 Please see the [Probationary Arrangements](#) section of the HR web pages for guidance on probation lengths.



Please note that you can also click on the blue hyperlink on screen to open the University's Probationary Arrangements in a new window.

5. You will then need to provide details about the type of contract being offered.

First, indicate the type of contract in the drop down box:



What type of contract are you offering?
 Permanent / open-ended
 --- Please select ---
 Permanent / open-ended
 Fixed-term

1. If you select **Permanent/ open-ended**, you will then need to indicate whether the funding for the position is limited or not.

Is there limited funding for this position?

Yes – funding is limited

-- Please Select --

Yes – funding is limited

No – funding is ongoing

If you select that the funding is limited, you will then need to enter a funding end date or duration.

Will the funding end on a specific date or after a fixed time period?

Specific end date (e.g. 31-Dec-2015)

Fixed time period (e.g. 2 years)

Expected funding end date

22-Feb-2017

Will the funding end on a specific date or after a fixed time period?

Specific end date (e.g. 31-Dec-2015)

Fixed time period (e.g. 2 years)

Length of funding:

2 Year(s)

2. If you select **Fixed-term**, you will then need to indicate an expected end date or duration for the contract of employment.

Will the position end on a specific date or after a fixed time period?

Specific end date (e.g. 31-Dec-2015)

Fixed time period (e.g. 2 years)

Expected end date of fixed-term contract:

22-Feb-2017

Reason for fixed-term contract:

-- Please select --

Will the position end on a specific date or after a fixed time period?

Specific end date (e.g. 31-Dec-2015)

Fixed time period (e.g. 2 years)

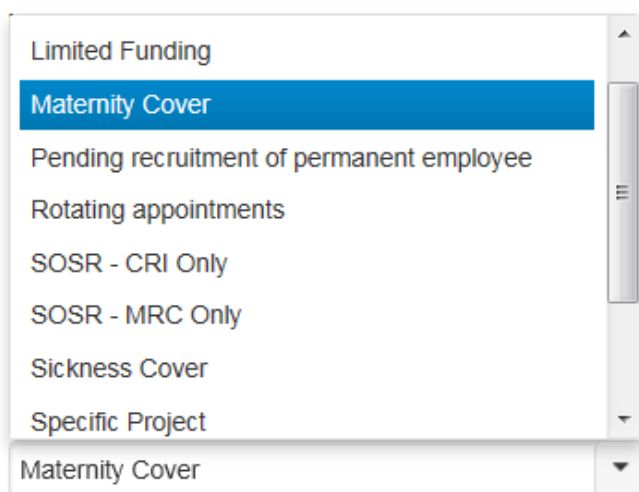
Length of contract:

2 year(s)

Reason for fixed-term contract:

-- Please select --

You will then also need to select a **Reason for fixed term contract** (this is your objective justification for offering the appointment on a fixed-term basis; please see the University’s Guidance on Fixed-Term Contracts at <http://www.admin.cam.ac.uk/offices/hr/policy/fixe/> for further details) from the drop-down list.



The value selected in this field will have a corresponding effect on the wording in any system-generated offer letter that you create:

Reason	Paragraph used in offer letter
All	Your employment will end on [end date], unless previously terminated in accordance with your contract of employment. This end date is because...[followed by the wording for the relevant reason below]
Limited funding for a specific purpose	...your employment relies on the availability of finite funds for a specific purpose that are not part of the University's general revenues.
Pending permanent appointment	...you have been appointed temporarily pending the recruitment of a permanent member of staff.
Rotating appointments	...this is a rotating appointment with a maximum duration defined by the University's Statutes and Ordinances.
Specific project with defined timeframe	...you have been appointed to undertake a specific project of finite duration.
Temporary cover (maternity)	...you have been appointed to provide temporary cover during the absence of another member of staff on maternity leave.
Temporary cover (sickness)	...you have been appointed to provide temporary cover during the absence of another member of staff.
Temporary cover (not sickness or maternity)	...you have been appointed to provide temporary cover during the absence of another member of staff.
Training	...you have been appointed to a traineeship.
Transitional duties pending a reorganisation	...you have been appointed to undertake transitional duties pending a reorganisation.
SOSR - MRC Only; SOSR - CRI	...you have been appointed to a three year training programme.



Please note that for secondments you should indicate the reason a secondment is taking place. The secondment itself is not a reason but rather a general term covering an appointment arrangement that can be used for a variety of reasons. For example, if you are offering a secondment to a current University employee in order to cover the Maternity Leave of the substantive role-holder, the reason you should use is Maternity Cover.

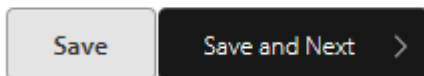
- Once you are satisfied that the values displayed on screen within the Dates tab accurately reflect the offer you intend to make, tick the check box to the left of **'The preceding details are now complete and correct'** to indicate that you have finished making changes.

Confirmation

The preceding details are now complete and correct.

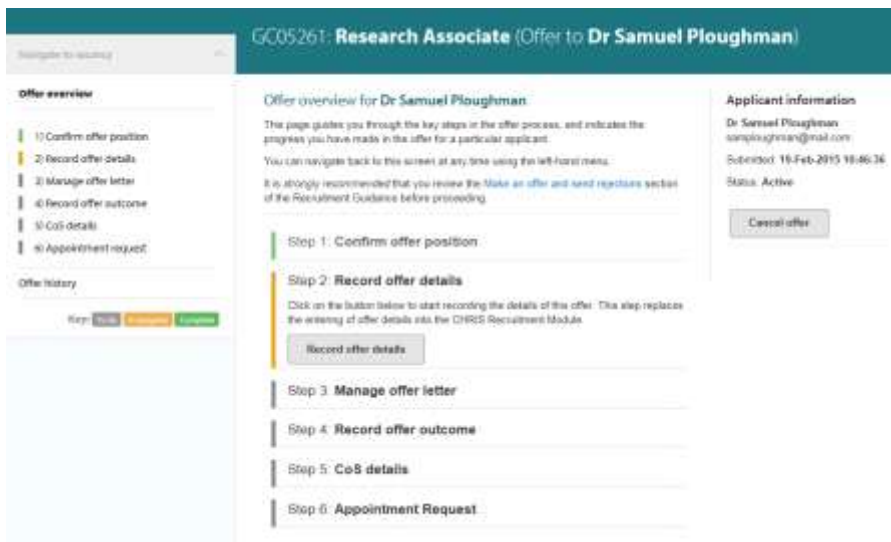
We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

- Click on **Save and next** when you are ready to move to the next tab in the process.



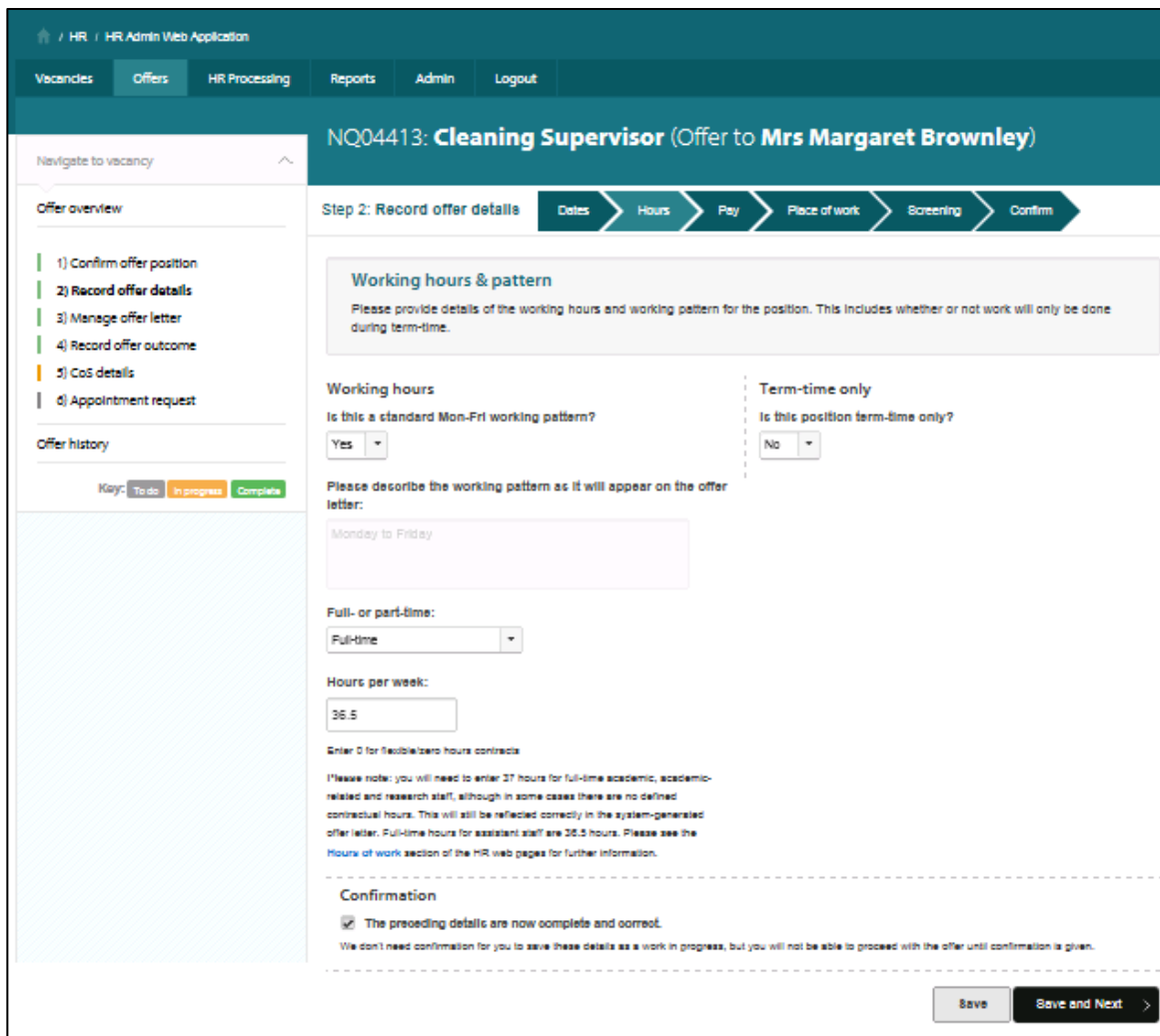
You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.



5.2 Entering hours and work patterns

The next tab in the **Record offer details** section is **Hours**. Here you will enter, update or confirm the required working hours and patterns for the position.



The screenshot shows the 'Hours' tab in the 'Record offer details' section for vacancy NQ04413: Cleaning Supervisor (Offer to Mrs Margaret Brownley). The interface includes a navigation menu with 'Offers' selected, a progress bar with steps: Dates, Hours, Pay, Place of work, Screening, and Confirm. The 'Hours' step is active.

Working hours & pattern
Please provide details of the working hours and working pattern for the position. This includes whether or not work will only be done during term-time.

Working hours
Is this a standard Mon-Fri working pattern?
Yes

Term-time only
Is this position term-time only?
No

Please describe the working pattern as it will appear on the offer letter:
Monday to Friday

Full- or part-time:
Full-time

Hours per week:
35.5

Enter 0 for flexible/zero hours contracts.

Please note: you will need to enter 27 hours for full-time academic, academic-related and research staff, although in some cases there are no defined contractual hours. This will still be reflected correctly in the system-generated offer letter. Full-time hours for assistant staff are 35.5 hours. Please see the [Hours of work](#) section of the HR web pages for further information.

Confirmation
 The preceding details are now complete and correct.
We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

Buttons: Save, Save and Next >

If there is a **standard working pattern** for the position held in CHRIS, this will be defaulted on screen. **Contractual hours** and whether the position is **term time only** will also be defaulted from CHRIS (reflecting any entries that were made for the vacancy in RAS when permission to fill was sought).

If you need to change any of the default values on the tab, you should (as applicable):

- Click on the drop-down list to the right of each field and select the correct value; or
- Overtyping the values shown with the correct ones.

Further details are provided below.

1. If the working pattern is NOT a standard Monday to Friday pattern, select **No** from the drop down list. You will then be able to use the text box to describe the working pattern.

Working hours

Is this a standard Mon-Fri working pattern?

No ▾

Please describe the working pattern as it will appear on the offer letter:

Tuesdays, Wednesdays and Thursdays



For assistant staff positions, the text entered here will be displayed as part of a sentence in the working hours section of any system-generated offer letter. See the assistant staff section of the table found at <http://www.hr.admin.cam.ac.uk/policies-procedures/hours-work> for an example.

2. Check the details regarding whether the position is full-time or part-time and the hours per week, amending these as required in accordance with the offer you plan to make.

Full- or part-time:

Full-time ▾

Hours per week:

36.5

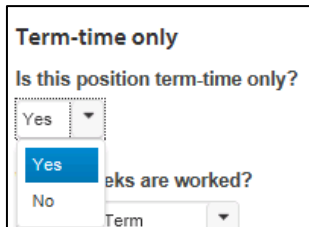
Enter 0 for flexible/zero hours contracts



Please note that in the **Hours per week** field you will need to enter 37 hours for full-time academic, academic-related and research staff, although in some cases there are no defined contractual hours. This will still be reflected correctly in the system-generated offer letter.

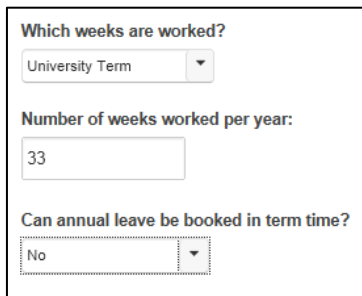
Full-time hours for assistant staff are 36.5 hours. You should enter 0 in **Hours per week** if there are no fixed hours of work and the employee will be paid by timesheet. A link to the HR pages is provided on screen for more guidance in this area.

3. Check the default response to '**Is this position term-time only?**'. If it is not correct then use the drop down list (selecting **Yes** or **No**) to modify it.



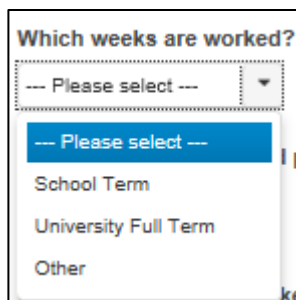
Term-time only
 Is this position term-time only?
 Yes [dropdown]
 Yes [button]
 No [dropdown]
 Term [dropdown]

4. If the position is term-time only then you will also need to check and update three more fields.




Which weeks are worked?
 University Term [dropdown]
 Number of weeks worked per year:
 33 [input]
 Can annual leave be booked in term time?
 No [dropdown]

a) For **'Which weeks are worked?'**, choose the required type of term from the drop-down list.

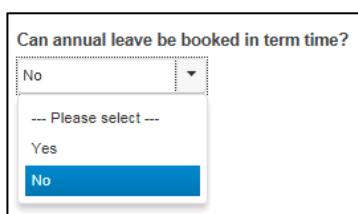


Which weeks are worked?
 -- Please select -- [dropdown]
 -- Please select -- [button]
 School Term
 University Full Term
 Other

b) For **Weeks worked per year**, enter the number of weeks that you will require the successful applicant to work.

 The school term is normally 39 weeks per year and the University full term is normally 26 weeks per year.

c) Select a response from the drop-down list after **'Can annual leave be booked in term time?'** field, based on whether the successful applicant will be permitted to take leave during the weeks that he/she works or if he/she will be expected to receive pay in lieu for accrued leave. Seek advice from the New Appointment Team if you are not sure.



Can annual leave be booked in term time?
 No [dropdown]
 -- Please select -- [dropdown]
 Yes
 No [button]



Please note that if you select **No** from the drop-down then the following wording will be inserted into holiday entitlement section of any system-generated offer letter that you create.

“As you will work only during term, you cannot book holiday within this time. However, you will receive payment in lieu for the holiday that you accrue. Further details will be provided in your contract of employment.”

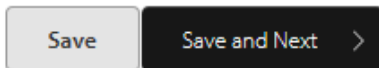
5. Once you are satisfied that the values displayed on screen within the Hours tab accurately reflect the offer that you intend to make, tick the check box to the left of **‘The preceding details are now complete and correct’**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

6. Click on **Save and Next**. You will be routed to the next tab in the Record offer details section.

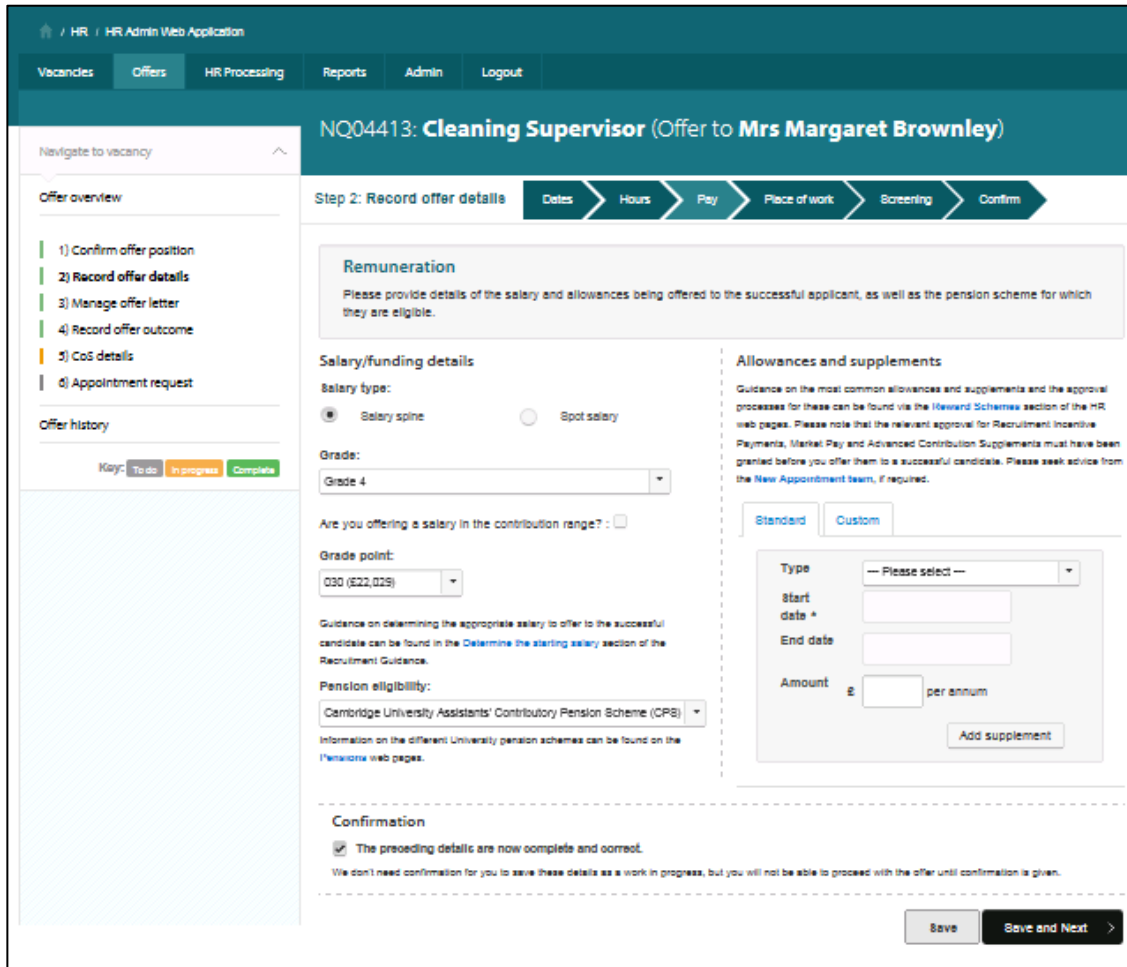


You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

5.3 Entering pay and other remuneration details

The next tab in the **Record offer details** section is **Pay**. Here you will enter, update or confirm the pay and other remuneration details for the position.



1. The **salary type** will be defaulted to **salary spine** or **spot salary** (normally the former), based on the position details held in CHRIS (and any entries made when requesting permission to fill in RAS).

If required, you can change the default. However, please note that University appointments should always be made to a point on the [single salary spine](#), unless there are exceptional circumstances which mean that this is not possible. Please see the [Determine the starting salary](#) section of the Recruitment Guidance for full details.

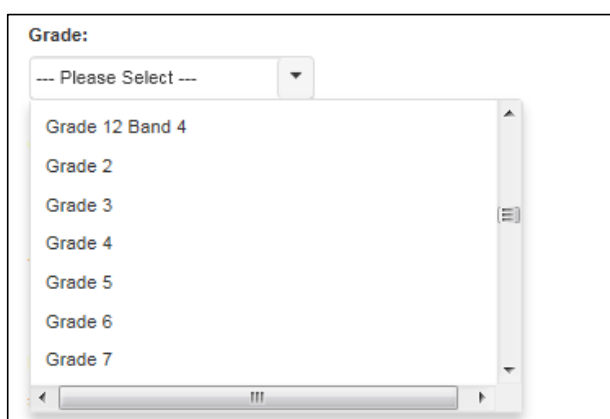
Salary/Funding Details


Salary Type:

Salary Spine
 Spot Salary

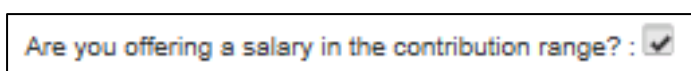
2. If **Salary Spine** is selected (as a default or by you), you will also need to check:


- a) **Grade** – a grade will normally already be selected, based on the position details held in CHRIS (and the details entered into RAS when permission to fill was requested). You should ensure that the correct grade is selected but note that making a change to the grade may invalidate your permission to fill and delay the appointment. Seek advice from the New Appointment Team if you are unsure what to do.



 Please note that if you select a clinical grade then you will be required to enter clinical-related HESA data in Step 6 of the offers process.

- b) If you intend to offer a salary in the contribution points for the grade, tick the check box to the left of '**Are you offering a salary in the contribution range?**'.



 Please note that you should not tick the box unless you have gained approval to offer a salary in the contribution range from your HR Business Manager/Adviser via the [HR4 Salary Case for Approval](#) process. You will be required to provide an approved HR4 later in the process when requesting an appointment. Please see the [Determine the starting salary](#) section of the Recruitment Guidance for full details.

- c) Select the **Grade point** from the drop down list of appropriate salary spine points/amounts for the relevant grade.

Grade point:

-- Please select --

-- Please select --

035 (£25,513)

036 (£26,274)

037 (£27,057)

038 (£27,864)

039 (£28,695)

040 (£29,552)

041 (£30,434)



Please note that the screen also includes a link to the [Determine the starting salary](#) section of the Recruitment Guidance, which opens in a new window when clicked.



If you are entering a grade point above the first three points within the salary scale for the grade, you will need to indicate how this was authorised by selecting a value from the drop down list. This may be because:

- Your HR Business Manager/Adviser has approved an [HR4 Salary Case for Approval](#); or
- The successful applicant is a current University employee already employed above the first three points for the same grade or is being promoted and is entitled to two increments; or
- You are appointing a Reader or Principal Research Associate at point 63, which is the required salary point for such appointments although it is in the contribution range for Grade 11.

Authorisation to offer above first 3 points or in contribution range:

-- Please select --

-- Please select --

HR4 approved by HR

Internal transfer/promotion

Appointment as Reader or as Principal Research Associate

Research Assistant/Associate under-appointment



Please note that when an [HR4](#) has been approved, you will be asked to provide a copy of this later in the process when requesting the appointment.

3. If **Spot salary** is selected (by default or by you) you will need to enter the **spot salary amount**.

Spot salary amount:

£

Guidance on the very limited circumstances when a spot salary should be used rather than a spine point is found in the Determine the starting salary section of the Recruitment Guidance.

Spot salaries are only approved in exceptional circumstances so you will also need to enter details of the approval for this. This will either be because the position is a type of appointment which is always made on a spot salary (please see the [Determine the starting salary](#) section of the Recruitment Guidance for a list of permitted spot salary positions), or because you have had an [HR4](#) agreed by your HR Business Manager/Adviser.

Have you gained approval from HR to offer a spot salary?

You must provide a completed [HR4 Starting Salary Case](#) form to your HR Business Manager/Adviser and have this approved before making an offer of a spot salary instead of a University spine point (unless the appointment is one of the very limited cases where spot salaries should be used, as explained in the [Determine the starting salary](#) section of the Recruitment Guidance). Spot salaries will only be approved in exceptional circumstances.

No

Yes

Permitted exception in the Recruitment Guidance

4. Check (and amend as required) the default pension scheme for the position.

Pension eligibility:

Cambridge University Assistants' Contributory Pension Scheme (CPS)

Universities Superannuation Scheme (USS)

Cambridge University Assistants' Contributory Pension Scheme (CPS)

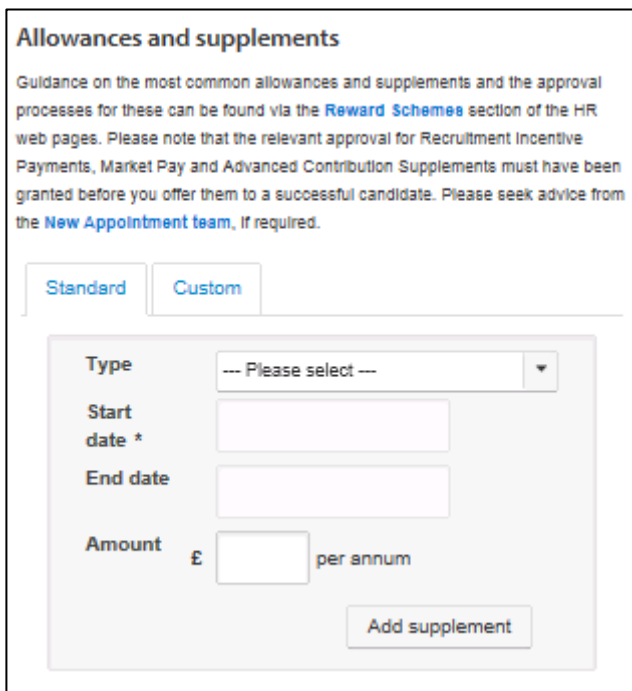
NOW: Pension Scheme

National Health Service Pension Scheme (NHSPS)



Please note that at this point, you need only enter the relevant overarching pension scheme from the drop-down list. The particular part of the pension scheme to which the employee will be added (e.g. CPS Revalued Benefits or CPS Hybrid) will be handled by the New Appointment Team as part of the appointment process.

5. Add any allowances and supplements for the position.

A screenshot of a web form titled "Allowances and supplements". The form has a header section with guidance text, followed by two tabs: "Standard" and "Custom". Below the tabs is a form area with fields for "Type" (a dropdown menu), "Start date *" (a date input), "End date" (a date input), and "Amount" (a text input with a pound sign and "per annum" label). An "Add supplement" button is located at the bottom right of the form area.

Allowances and supplements

Guidance on the most common allowances and supplements and the approval processes for these can be found via the [Reward Schemes](#) section of the HR web pages. Please note that the relevant approval for Recruitment Incentive Payments, Market Pay and Advanced Contribution Supplements must have been granted before you offer them to a successful candidate. Please seek advice from the [New Appointment team](#), if required.

[Standard](#) [Custom](#)

Type: --- Please select ---

Start date *:

End date:

Amount: £ per annum

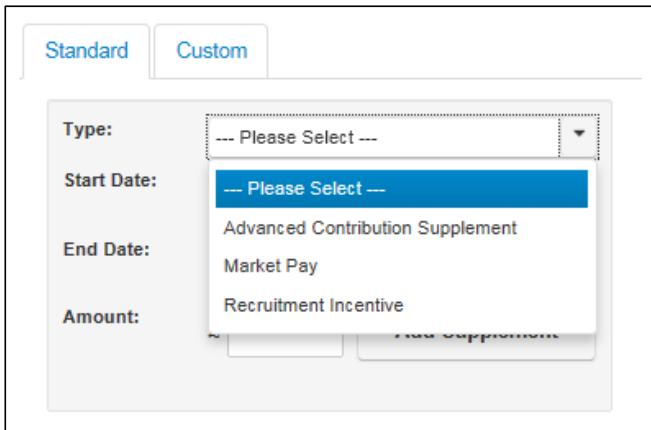
[Add supplement](#)

There are two panels. The first panel ('standard') is for the following:

- Advance contribution supplement;
- Market pay; and
- Recruitment incentive payments.

The second panel ('custom') is for any other supplements to salary.

a) For a 'standard' allowance/supplement, select the type from the drop down list.



Standard Custom

Type: --- Please Select ---

Start Date: --- Please Select ---

End Date:

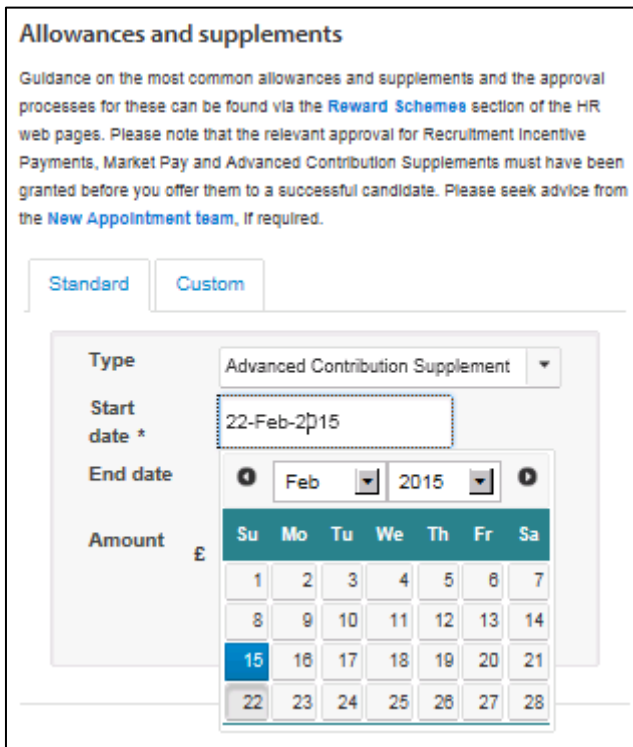
Amount:

Advanced Contribution Supplement

Market Pay

Recruitment Incentive

Then, enter the **Start Date** and optional **End Date** using the date pickers.



Allowances and supplements

Guidance on the most common allowances and supplements and the approval processes for these can be found via the [Reward Schemes](#) section of the HR web pages. Please note that the relevant approval for Recruitment Incentive Payments, Market Pay and Advanced Contribution Supplements must have been granted before you offer them to a successful candidate. Please seek advice from the [New Appointment team](#), if required.

Standard Custom

Type: Advanced Contribution Supplement

Start date *: 22-Feb-2015

End date: Feb 2015

Amount: £

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Enter the **Amount** and click on the **Add Supplement** button.

Allowances and supplements

Guidance on the most common allowances and supplements and the approval processes for these can be found via the [Reward Schemes](#) section of the HR web pages. Please note that the relevant approval for Recruitment Incentive Payments, Market Pay and Advanced Contribution Supplements must have been granted before you offer them to a successful candidate. Please seek advice from the [New Appointment team](#), if required.

Standard
Custom

Type Advanced Contribution Supplement ▼

Start date *

End date

Amount £ per annum

[Add supplement](#)

Details of the supplement will be displayed on the screen.

Advanced Contribution Supplement

Start date: 22-Feb-2015

End date: 26-Feb-2017

Annual amount: £3,000

[Remove](#)

A confirmation pop-up message will also be displayed.



Please note that the **Remove** button can be used to delete an allowance or supplement entered in error.

b) To enter a 'custom' allowance or supplement, click on the **Custom** tab.

Enter a text description of the supplement (this will be used later in the process as an instruction to the New Appointment Team) and how you would like the details of the allowance/supplement to appear in any system-generated offer letter that you create.

Standard Custom

Custom benefit

Car allowance

Custom benefit as shown on the offer letter

This position also comes with a taxable car allowance of £3000 per annum

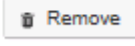
Add supplement

Click on the **Add Supplement** button.

Details of the supplement will be displayed on the screen.

Advanced Contribution Supplement

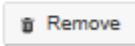
Start date: 22-Feb-2015
 End date: 28-Feb-2017
 Annual amount: £3,000



Custom Benefit / Supplement

Car allowance

This position also comes with a taxable car allowance of £3000 per annum



A confirmation pop-up message will also be displayed.



Please note that the **remove** button can be used to delete an allowance or supplement entered in error.

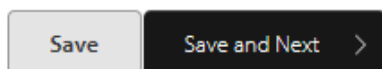
- Once you are satisfied that the values displayed on screen within the Pay tab accurately reflect the offer that you intend to make, tick the check box to the left of **'The preceding details are now complete and correct'**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

- Click on **Save and Next**. You will be routed to the next tab in the Record offer details section.

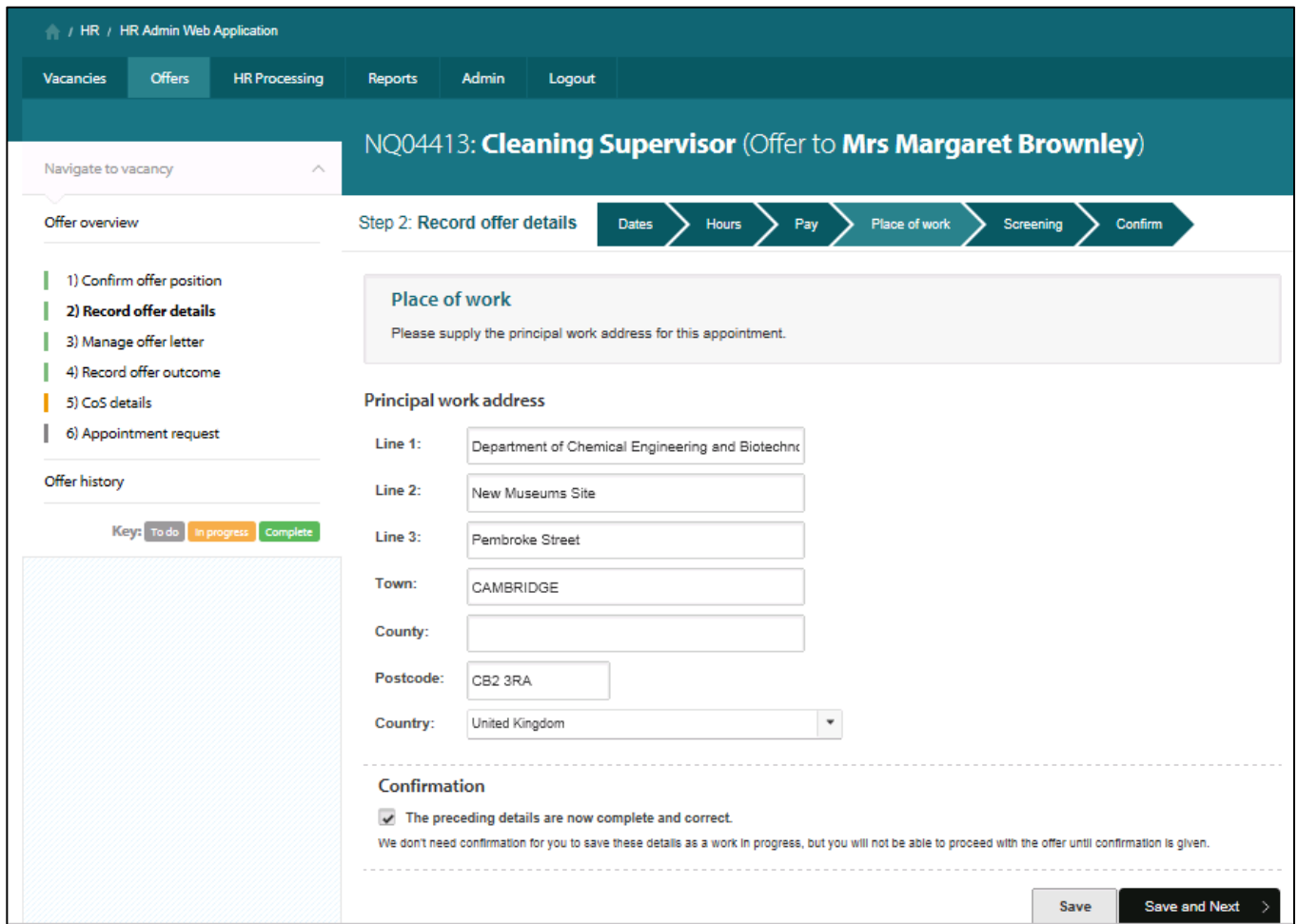


You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

5.4 Recording the principal place of work

The next tab in the **Record offer details** section is **Place of work**. Here you will review (and update, if required) the address details displayed initially. These reflect those held against the position in CHRIS.



The screenshot shows the 'Place of work' tab in the CHRIS HR Admin Web Application. The breadcrumb trail is 'HR / HR Admin Web Application'. The navigation menu includes 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The offer title is 'NQ04413: Cleaning Supervisor (Offer to Mrs Margaret Brownley)'. The current step is 'Step 2: Record offer details', with a progress bar showing 'Dates', 'Hours', 'Pay', 'Place of work', 'Screening', and 'Confirm'. The 'Place of work' section contains the instruction 'Please supply the principal work address for this appointment.' and the following fields:

- Line 1: Department of Chemical Engineering and Biotechn
- Line 2: New Museums Site
- Line 3: Pembroke Street
- Town: CAMBRIDGE
- County:
- Postcode: CB2 3RA
- Country: United Kingdom

The Confirmation section includes a checked checkbox and the text: 'The preceding details are now complete and correct. We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.' At the bottom right, there are 'Save' and 'Save and Next >' buttons.

1. Overtyping any of the fields that you wish to change. You can also update the country using the drop down list.



Note that if you do decide to change the address details, you should normally have the department/ institution name as line 1.

You may also wish to change the **Town** to sentence case as these details will be used later in any system-generated offer letter that you create.

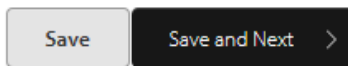
2. Once you are satisfied that the details displayed on-screen in the Place of work tab are correct, tick the check box to the left of **'The preceding details are now complete and correct'**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

3. Click on **Save and Next**. You will be routed to the next tab in the Record offer details section.

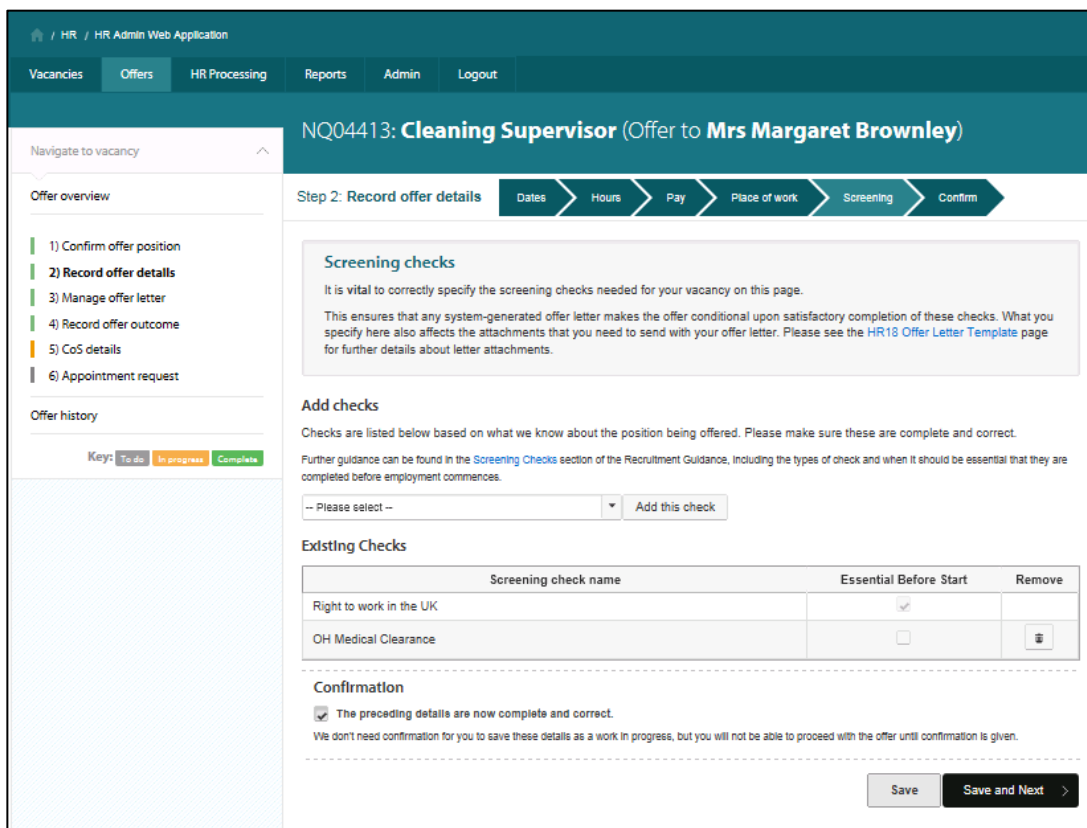


You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

5.5 Entering/confirming screening checks

The next tab in the **Record offer details** section is **Screening**. Here you will review (and update, if required) the screening checks required for the appointment, which are pre-filled based on the required checks held in CHRIS (and entered into RAS when permission to fill was requested).



The screenshot shows the 'Screening checks' page in the CHRIS HR Admin Web Application. The page title is 'NQ04413: Cleaning Supervisor (Offer to Mrs Margaret Brownley)'. The navigation bar includes 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The 'Offers' tab is active, and the 'Screening' step is highlighted in the progress bar.

The 'Screening checks' section contains the following text:

Screening checks


It is vital to correctly specify the screening checks needed for your vacancy on this page. This ensures that any system-generated offer letter makes the offer conditional upon satisfactory completion of these checks. What you specify here also affects the attachments that you need to send with your offer letter. Please see the [HR18 Offer Letter Template](#) page for further details about letter attachments.

Add checks

Checks are listed below based on what we know about the position being offered. Please make sure these are complete and correct. Further guidance can be found in the [Screening Checks](#) section of the Recruitment Guidance, including the types of check and when it should be essential that they are completed before employment commences.

-- Please select -- Add this check

Existing Checks

Screening check name	Essential Before Start	Remove
Right to work in the UK	<input checked="" type="checkbox"/>	
OH Medical Clearance	<input type="checkbox"/>	

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

Buttons: Save, Save and Next >

It is vital that you identify and record the all of required screening checks accurately so that any system-generated offer letter that you create (as shown in the table below) contains the correct check-related conditions, ensuring that it will be possible for the University to withdraw an offer of employment, if required, in the event that a screening check result is not satisfactory to us.

Check	Paragraph used in offer letter
All types	This offer is conditional upon: [wording that follows is dependent on the check type(s) required]
Basic disclosure (criminal records check).	The satisfactory outcome of a basic disclosure (criminal records check). Whether an outcome is satisfactory will be determined by the University.
DBS – enhanced only	The satisfactory outcome of an enhanced Disclosure and Barring Service check. Whether an outcome is satisfactory will be determined by the University.
DBS – enhanced with adults’ barred list	The satisfactory outcome of a Disclosure and Barring Service check (enhanced with adults’ barred list). Whether an outcome is satisfactory will be determined by the University.
DBS - enhanced with children’s barred list	The satisfactory outcome of a Disclosure and Barring Service check (enhanced with children’s barred list). Whether an outcome is satisfactory will be determined by the University.
DBS - enhanced with children and adults’ barred lists)	The satisfactory outcome of a Disclosure and Barring Service check (enhanced with children and adults’ barred lists). Whether an outcome is satisfactory will be determined by the University.
DBS - standard	The satisfactory outcome of a standard Disclosure and Barring Service check. Whether an outcome is satisfactory will be determined by the University.
Honorary Clinical Contract	You acquiring an Honorary Clinical Contract.
NMC Registration	[None]
OH Medical Clearance (also known as a Health Assessment)	[None – offers are never conditional upon a health assessment]
Security check	The satisfactory outcome of a security screening check. Whether an outcome is satisfactory will be determined by the University.
Research Passport (any type)	You acquiring a Research Passport.



Please note that where multiple appropriate checks are selected, they will all be listed in the system-generated offer letter using an appropriate sentence structure.




Please note that OH Medical Clearance/Health Assessment only applies to a limited number of roles, as explained in the [Health Assessment](#) pages in the Screening checks section of the Recruitment Guidance. This is not the same as the OHF30 Work Health Declaration, which is a health questionnaire that must be sent with the offer letter for every appointment.

If you are not familiar with the University’s requirements for screening checks, or you have any uncertainty about the checks needed for a particular position, please review the [Screening checks](#)

section of the Recruitment Guidance. If you need any further assistance, please contact the Compliance Team (compliance@admin.cam.ac.uk).

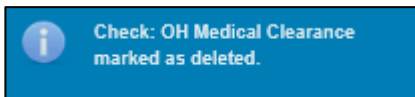
1. If any of the required screening checks listed in the table are incorrect then click the **Remove** button (this is a rubbish bin icon, shown in yellow below) next to the check in question.

Existing Checks		
Screening check name	Essential Before Start	Remove
Right to work in the UK	<input checked="" type="checkbox"/>	
OH Medical Clearance	<input type="checkbox"/>	

This check will then be struck through.

Existing Checks		
Screening check name	Essential Before Start	Remove
Right to work in the UK	<input checked="" type="checkbox"/>	
OH Medical Clearance <small>(This row will be deleted when you save the form)</small>	<input type="checkbox"/>	

A pop-up confirmation message will also be displayed.



The check will then be removed when you click on the **'Save'** or **'Save and next'** button.

Existing Checks		
Screening check name	Essential Before Start	Remove
Right to work in the UK	<input checked="" type="checkbox"/>	

2. To add a new check requirement, select the type you need from the drop-down list and then click on **Add this check**.

-- Please select --

Add this check

-- Please select --

Basic disclosure

DBS - enhanced only

DBS - enhanced with adults' barred list

DBS - enhanced with children and adults' barred lists

DBS - enhanced with children's barred list


DBS - standard

Honorary Clinical Contract

in progress, but you will not

- The selected check will appear on the screen.

If it is essential that the check is completed before the successful applicant starts work in the position, the check must be marked as **Essential before start** by ticking the check box in the relevant column in the table.

Existing Checks		
Screening check name	Essential Before Start	Remove
Right to work in the UK	<input checked="" type="checkbox"/>	
Security	<input type="checkbox"/>	



Please see the [Identify screening checks](#) section of the Recruitment Guidance if you are not sure if a check should be treated as **Essential Before Start**.



Please note: you will also need to add any Occupational Health and DBS checks required as part of a Research Passport separately; the system does not do this automatically based on the type of Research Passport that you select. The individual check(s) must be specified for the correct details to be included in any system-generated offer letter that you create, in the Appointment Request and in CHRIS.

- Once you are satisfied that the details displayed on-screen in the Screening tab are correct, tick the check box to the left of **'The preceding details are now complete and correct'**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

- Click on **Save and Next**. You will be routed to the next tab in the Record offer details section.

Save

Save and Next >



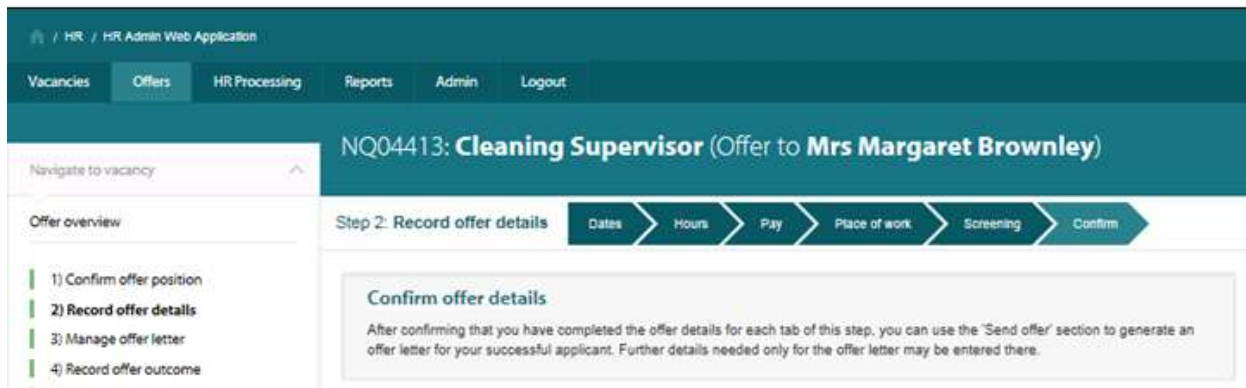
You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

5.6 Confirming offer details


The final step in the **Record offer details** process is the **Confirm** tab. This requires you to confirm the details you have entered in the other tabs before proceeding, helping you to ensure that the details in

any system-generated offer letter you create (and the Appointment Request you send later in the process) are accurate and complete.



1. If any of the tabs on the progress bar on the **Confirm** screen are shown in red, you will need to go back to the relevant tab and complete the missing details.

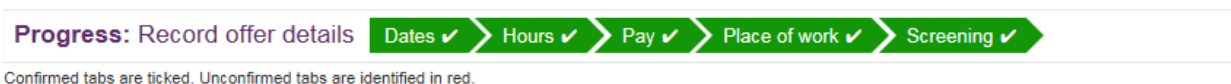



 If it looks as though all required details have been entered onto an incomplete tab, ensure that you have ticked the check box to confirm that the tab is complete and correct and press **Save**.

Confirmation

The preceding details are now complete and correct.

2. Once all tabs are green and you are satisfied that you have provided all required details on them, click on **Proceed to send offer**.



 All necessary information has been provided. You may now proceed to send the offer.

Proceed to send offer >



You will then be taken to **Step 3 Manage offer letter**, where you can choose to create and send a system-generated offer letter or upload a manual version prepared outside of the system (using the [HR18 Conditional Offer Letter](#) template).


6 Step Three - Manage Offer Letter


6.1 Choosing the type of offer letter

Your first task in **Manage offer letter** is to select whether you will be creating a system-generated offer letter or writing your own offer letter manually (i.e. outside the system using the [HR18 Conditional Offer Letter](#) template).

Click on the relevant button to indicate your chosen option.



 If you select a manually-generated letter, you will be asked to upload a copy later on.

 You can change your mind about the type of offer letter you will be creating at any time in this step by clicking at the link at the top of the page. For example:

Step 3: **Manual offer** 

Upload letter

Please record the details of the offer sent to the applicant, and upload a copy of the offer letter.

You might prefer to [send a system-generated offer letter](#) instead.

If you have chosen a system-generated offer letter please refer to [section 6.2 immediately below](#).

If you have chosen to construct the letter manually please see [section 6.3 below](#).

6.2 Creating a system-generated letter

If you would like the Web Recruitment System to generate an offer letter for you, you will need to add extra details in addition to those provided in Steps 1 and 2.

Additional information is needed regarding:

- The applicant and the position being offered;
- The contact details to be shown on the letter;
- Any additional conditions to be inserted into the letter; and
- Any additional paragraphs to be added at the bottom of the letter.

This additional information is arranged into four tabs and these are shown as breadcrumbs along the top of the screen:



6.2.1 Entering applicant and position details

If you chose to create a system-generated letter you will automatically be directed to the first tab in the **Manage offer letter** process, which is **Applicant & position**.

<p>Applicant details</p> <p>Applicant title: Miss</p> <p>Applicant given name: Margaret</p> <p>Applicant family name: Brown</p> <p>Applicant address: 19 Harley Road, Cambridge, cb1 1we, United Kingdom</p>	<p>Position details</p> <p>Department/Institution: Human Resources Division</p>
---	--

1. The applicant’s name and address will be displayed, reflecting what the applicant entered into their online application form. Please review these details and edit if required (for example, if the successful applicant has informed you that they have moved house since their applied for the position).
2. The **Department/Institution** reflects what is held in CHRIS. Please edit if required.
3. Once you are satisfied that the details displayed on-screen in the Screening tab are complete and correct, tick the check box to the left of **‘The preceding details are now complete and correct’**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

4. Click on **Save and Next**. You will be routed to the next tab in the Manage offer letter section.

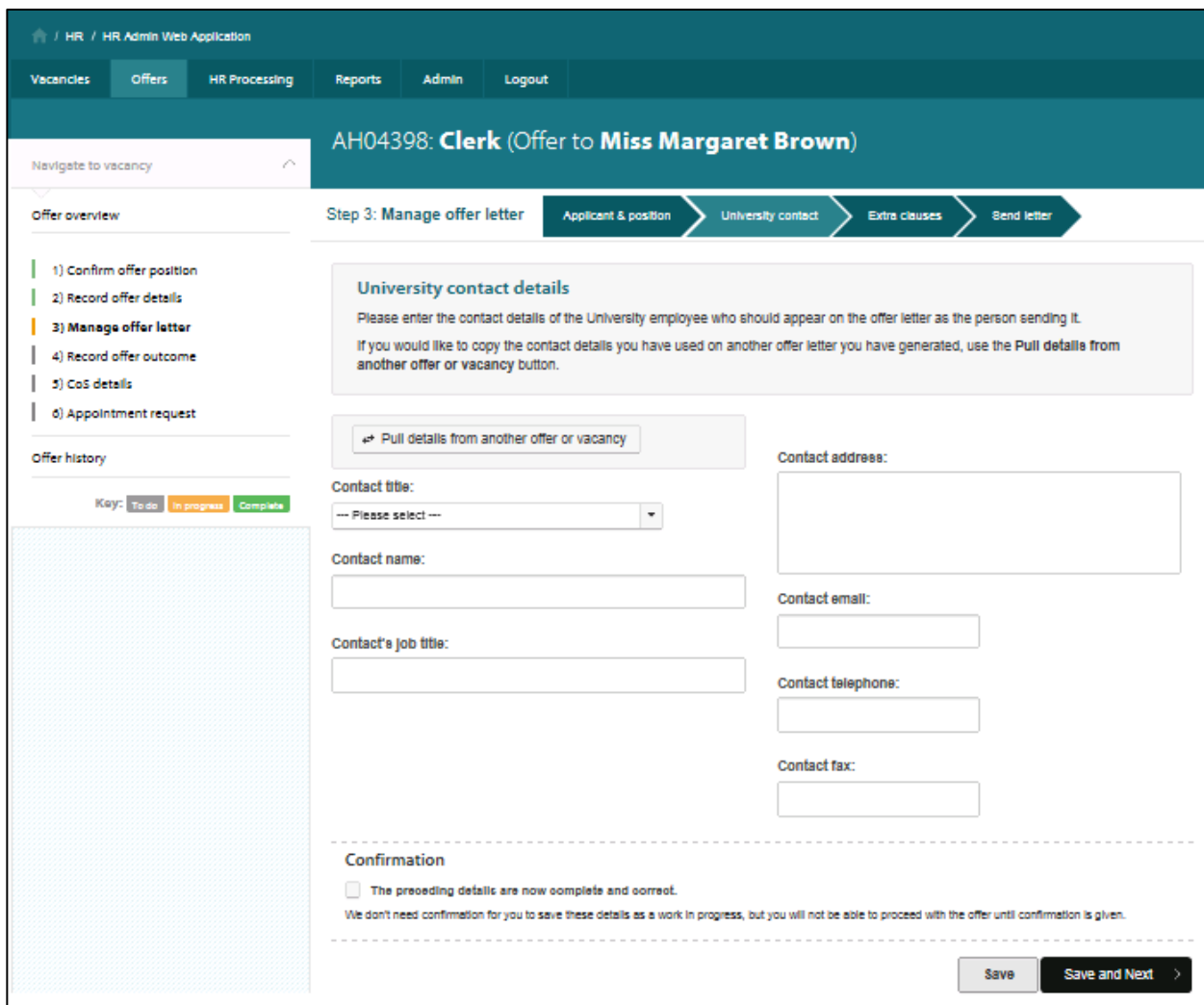


You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

6.2.2 Entering University contact details

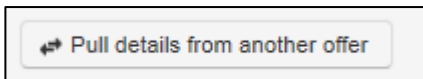
The next tab in the **Manage offer letter** process allows you to enter the **University contact** details that will appear in the sender’s name and address sections of the offer letter.



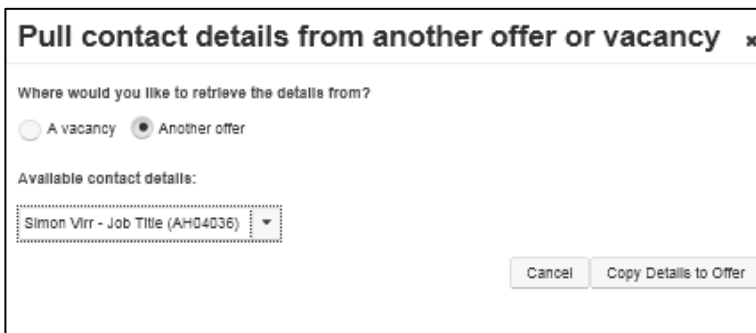
The screenshot shows the HR Admin Web Application interface. The breadcrumb trail is 'HR / HR Admin Web Application'. The navigation menu includes 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The current page title is 'AH04398: Clerk (Offer to Miss Margaret Brown)'. The 'Offer overview' sidebar lists steps: 1) Confirm offer position, 2) Record offer details, 3) Manage offer letter (highlighted), 4) Record offer outcome, 5) CoS details, and 6) Appointment request. The 'Offer history' section shows a key for 'To do', 'In progress', and 'Complete'. The main content area is 'Step 3: Manage offer letter' with a progress bar showing 'Applicant & position', 'University contact' (current step), 'Extra clauses', and 'Send letter'. The 'University contact details' form includes a 'Pull details from another offer or vacancy' button, a 'Contact title' dropdown menu, and input fields for 'Contact name', 'Contact's job title', 'Contact address', 'Contact email', 'Contact telephone', and 'Contact fax'. A 'Confirmation' section at the bottom has a checkbox for 'The preceding details are now complete and correct.' and a note: 'We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.' The 'Save' and 'Save and Next' buttons are at the bottom right.

The fields on the screen will be blank. Either you can complete the details manually or you can chose to pull through details from a previous offer you have made or from the vacancy contact details.

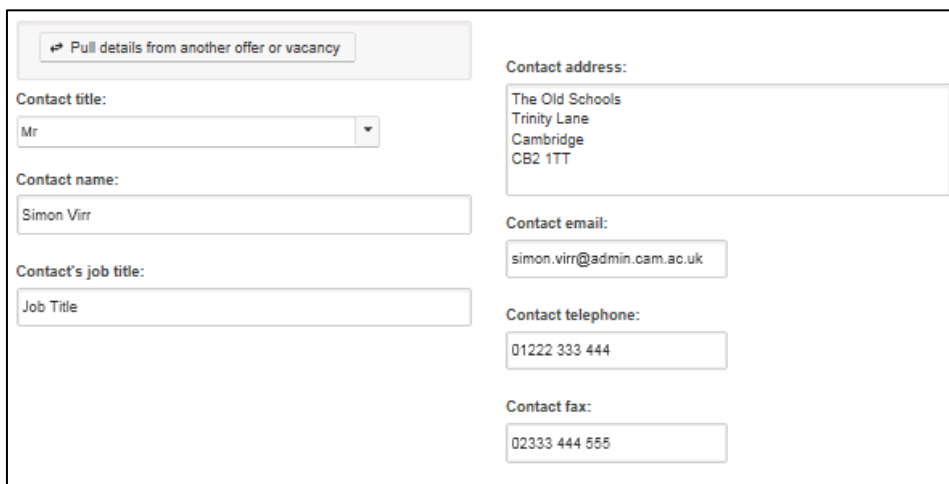
1. If you wish to copy details from within the system:
 - a) Click on the **Pull details from another offer or vacancy** button.



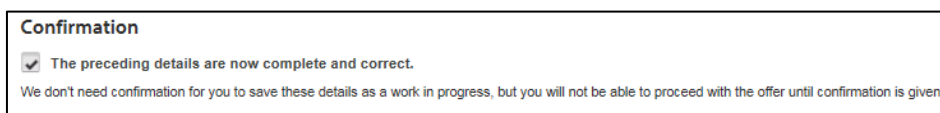
The following options will be displayed:



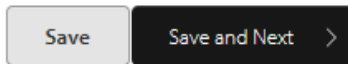
- b) Select whether to retrieve previous details from an offer or a vacancy, and select the contact details to be copied from the choices in the drop down list.
 - c) Click on the **Copy Details to Offer** button. The selected details will then be copied into the University contact details screen for you to review and update as required.



2. Once you have copied or entered the contact details for the offer letter and you are satisfied that the details are complete and correct, tick the check box to the left of **'The preceding details are now complete and correct'**:



3. Click on **Save and Next**. You will be routed to the next tab in the Manage offer letter section.



You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

6.2.3 Entering extra clauses

The tab in the **Manage offer letter** process is **Extra clauses**. Here you can customise your system-generated offer letter by:

- Entering any other terms and conditions of employment not covered elsewhere (add these in 'Any other conditions'; they will display in the 'Any other conditions' paragraph of the offer letter).
- You can also additional paragraphs that will appear within the main body of the letter (add these in 'Extra paragraphs'; they will be inserted as the penultimate paragraph(s) in the letter).

AH04398: Clerk (Offer to Miss Margaret Brown)

Step 3: Manage offer letter
Applicant & position
University contact
Extra clauses
Send letter

Extra clauses

You may add additional conditions of employment to appear under 'Any other conditions' in the offer letter, to cover terms not mentioned elsewhere.

It is also possible to include extra paragraphs at the end of the letter, if needed.

Any other conditions (0)
Extra paragraphs (0)

Add "Any other conditions" of employment

Here you can add any additional terms and conditions to your offer letter that are not covered elsewhere (for example, details of working arrangements specific to your department/institution). This text you add will appear in the *Any Other Conditions* section of the offer letter.

Any other conditions as they will appear in the offer letter:

Any other conditions

i No additional conditions have been stated.

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

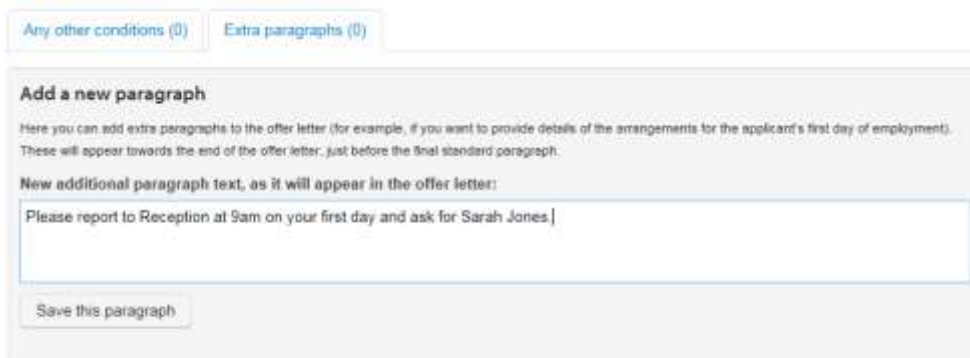


You may wish to use the other condition facility to inform the successful applicant about any terms and conditions which are specific to your department/institution (such as any mandatory office closure periods) or to the position (such as the opportunity for overtime at certain times of the year).



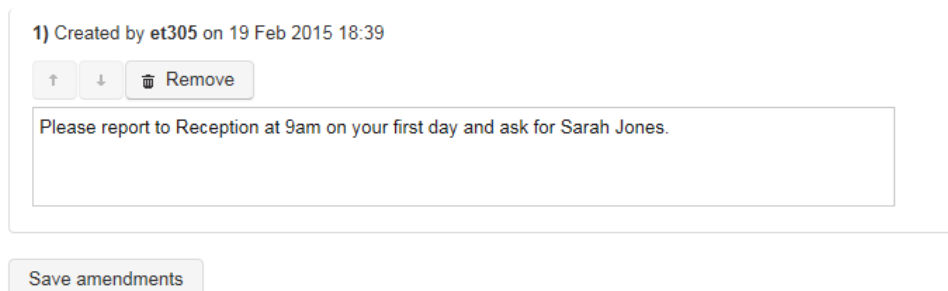
You may wish to use the extra paragraph facility to inform the successful applicant about any additional [health screening](#) arrangements for the role (beyond the OHF30 Health Declaration) or about the arrangements for their first day (if you choose not to use the [HR23 Welcome Letter](#)).

1. Add another condition or extra paragraph by clicking on the appropriate tab and typing in the text as it will appear on the offer letter, then click on the **Save this condition of employment** or **Save this paragraph** button.

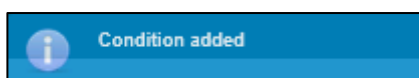


The condition or paragraph entered will be displayed on the screen:

Extra paragraphs



A pop up confirmation message will also be displayed.



Please note that the **Remove** button can be used to delete an extra condition or paragraph entered in error.



You can also amend the text for an extra condition or paragraph and click on the **Save amendments** button.



To alter the order in which the extra conditions or paragraphs appear in the letter you can use the up and down arrows to the left of the Remove button.

1) Created by et305 on 19 Feb 2015 18:39

↑ ↓ Remove

Please report to Reception at 9am on your first day and ask for Sarah Jones.

2) Created by et305 on 19 Feb 2015 18:42

↑ ↓ Remove

For information, I have attached a copy of your local induction schedule for your first week. As you will see, your first day will include meetings with key colleagues and a tour of the department.

- Once you are satisfied that the details displayed on-screen on both pages of the Extra clauses tab are complete and correct, tick the check box to the left of '**The preceding details are now complete and correct**':

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

- Click on **Save and Next**. You will be routed to the final tab in the Manage offer letter section.

Save

Save and Next >

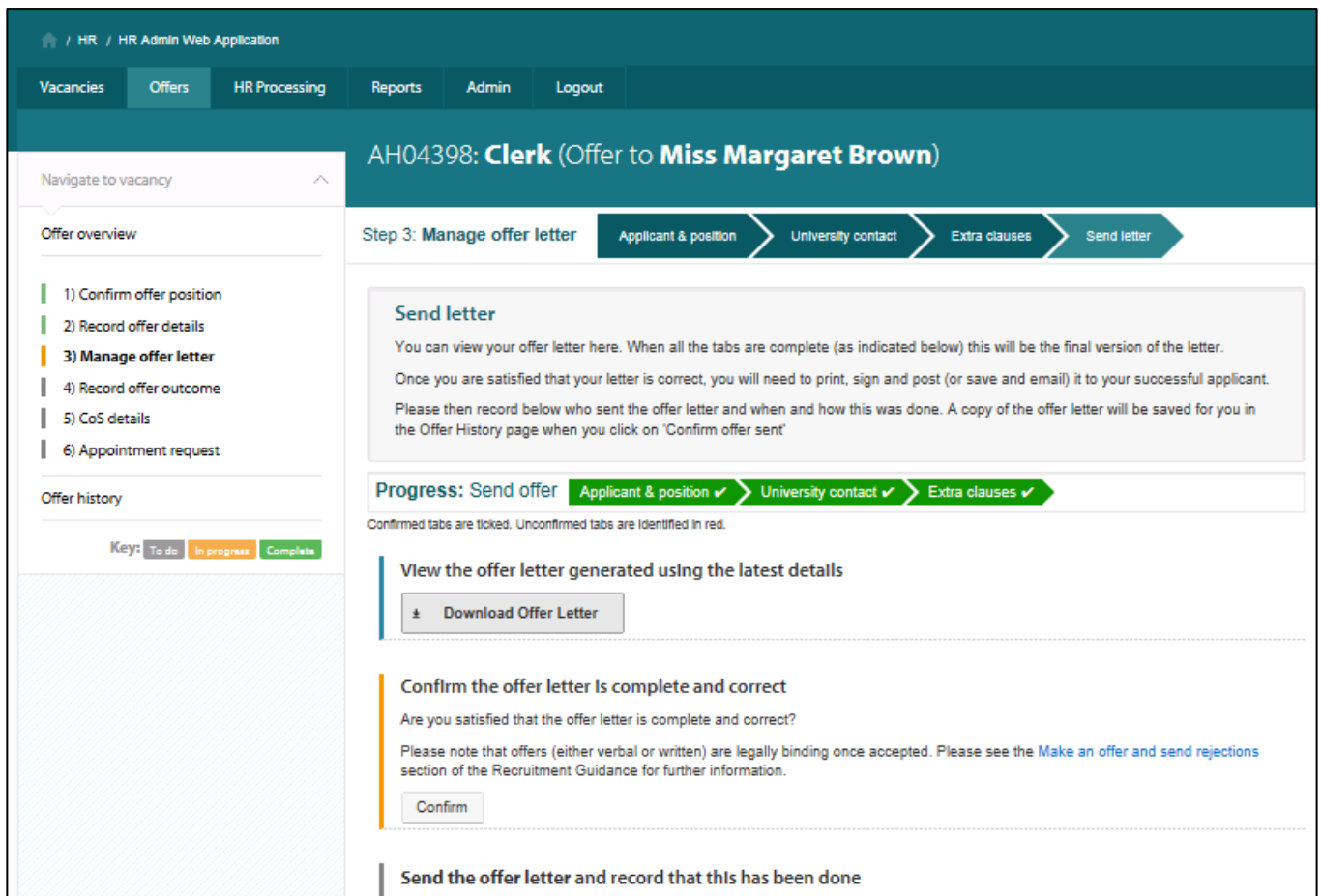


You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

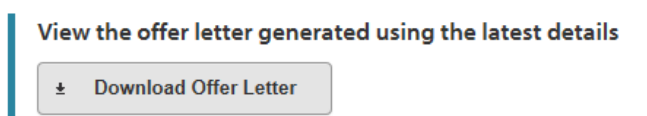
6.2.4 Sending the system-generated offer letter

The final tab in the **Manage offer letter** process is **Send letter**. It involves you checking the system-generated offer letter, downloading it to send to the successful applicant and recording who sent it and when.



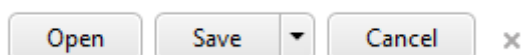
The screenshot shows the HR Admin Web Application interface. The top navigation bar includes 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The main header displays 'AH04398: Clerk (Offer to Miss Margaret Brown)'. A left-hand navigation pane lists steps: 1) Confirm offer position, 2) Record offer details, 3) Manage offer letter (highlighted), 4) Record offer outcome, 5) CoS details, and 6) Appointment request. The main content area is titled 'Step 3: Manage offer letter' and features a progress bar with four steps: 'Applicant & position', 'University contact', 'Extra clauses', and 'Send letter'. Below the progress bar, the 'Send letter' section contains instructions: 'You can view your offer letter here. When all the tabs are complete (as indicated below) this will be the final version of the letter. Once you are satisfied that your letter is correct, you will need to print, sign and post (or save and email) it to your successful applicant. Please then record below who sent the offer letter and when and how this was done. A copy of the offer letter will be saved for you in the Offer History page when you click on 'Confirm offer sent''. A progress indicator shows 'Send offer' with three completed steps: 'Applicant & position', 'University contact', and 'Extra clauses'. A 'Download Offer Letter' button is visible under the heading 'View the offer letter generated using the latest details'. Below this, a confirmation prompt asks 'Are you satisfied that the offer letter is complete and correct?' with a 'Confirm' button. At the bottom, there is a section for 'Send the offer letter and record that this has been done'.

1. To review the system-generated offer letter, click on the **Download Offer Letter** button.



A close-up of the 'Download Offer Letter' button, which is a rectangular button with a download icon and the text 'Download Offer Letter'.

2. Click on **Open** on the dialog box.



A screenshot of a dialog box with three buttons: 'Open', 'Save', and 'Cancel'. The 'Open' button is highlighted with a yellow bar above it. There is also a close button (X) to the right of the 'Cancel' button.

A PDF of the offer letter will open.



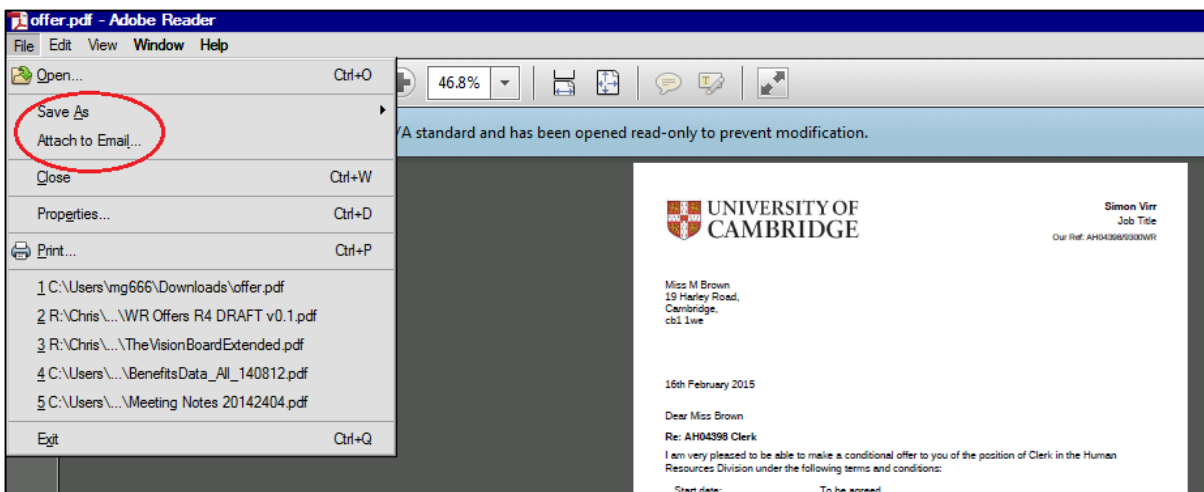
The offer letter includes appropriate text depending on what has been entered during the offer process. The content is consistent with that of the [HR18 Conditional Offer Letter](#) template.

If you require further information regarding precisely how the entered information affects the letter content, please contact the CHRIS Helpdesk at CHRIS.Helpdesk@admin.cam.ac.uk.

- Once you are satisfied that the letter is complete and correct, you can use the standard functions within Adobe Reader (or other PDF reading software) to print and post the letter or attach it to an email and send it electronically.



Please note: both methods of sending the letter are outside of the system. This is because of the importance of managing the issuing of an offer letter carefully, the likelihood that a number of successful applicants will want a hard, signed copy of the letter, and the fact that recruiters are likely to want to send a personalised covering email to an offer letter that is sent electronically.




- Click on the **Confirm** button to verify that the offer letter is complete and correct.


Confirm the offer letter is complete and correct

Are you satisfied that the offer letter is complete and correct?

Please note that offers (either verbal or written) are legally binding once accepted. Please see the [Make an offer and send rejections](#) section of the Recruitment Guidance for further information.

 **Please note:** an offer of employment, whether verbal or in writing, is legally binding once accepted. Therefore, it is important that you ensure that the offer letter is accurate before you issue it. Please see the [Make an offer](#) section of the Recruitment Guidance for key matters to consider before making an offer.

5. You now need to:
 - a. Print and post the letter to the successful applicant; and/or
 - b. Attach the letter to an email and send it electronically to the successful applicant.

 **Please note:** you must remember to send the required enclosures with the offer letter (listed at the end of the letter). You can find links to all possible enclosures, or information on where to obtain them, on the [HR18 Conditional Offer Letter](#) home page.

6. Once you have (or someone else has) sent the offer letter by post or email, enter the date that this was done and who sent the letter so that there is an audit trail within the system. Click on **Confirm offer sent**.

Send the offer letter and record that this has been done

Once you have confirmed that the offer letter is complete, you need to print, sign and post (or email) with any required attachments listed at the bottom of the letter. If you are not sure where to find these attachments, please visit the [HR18 Conditional Offer Letter](#) page.

When was the offer sent?

Who sent the offer?

A pop up confirmation message will confirm that the details were recorded and a copy of the letter will be added to the offer letter history:





You will then be taken back to the offer overview page, which will show the stage of progress of the offer.

AH04398: **Clerk** (Offer to **Miss Margaret Brown**)

Offer overview for **Miss Margaret Brown**

This page guides you through the key steps in the offer process, and indicates the progress you have made in the offer for a particular applicant.

You can navigate back to this screen at any time using the left-hand menu.

It is *strongly recommended* that you review the [Make an offer and send rejections](#) section of the Recruitment Guidance before proceeding.

Applicant information

Miss Margaret Brown
me@here.com
Submitted: 09-Feb-2015 18:45:49
Status: **Conditional offer made**

Step 1: Confirm offer position

Step 2: Record offer details

Step 3: Manage offer letter

Step 4: Record offer outcome

You will record the applicant's response to your offer in this step (i.e. that the offer has been accepted or rejected) or indicate that you have withdrawn the offer.

Step 5: CoS details

Step 6: Appointment Request

6.3 Recording that a manually constructed offer letter has been sent

Where you have already chosen (see section 6.1) to create an offer letter manually (i.e. outside of the Web Recruitment System and using the [HR18 Conditional Offer Letter](#) template), you will need to upload a copy of the letter to store it against the vacancy in Web Recruitment.

The offer letter is required by the New Appointment Team when processing the appointment. Uploading it also ensures that there is an audit trail of the recruitment process for your vacancy.

Step 3: **Manual offer**
Upload letter

Upload letter

Please record the details of the offer sent to the applicant, and upload a copy of the offer letter.

You might prefer to [send a system-generated offer letter](#) instead.

Upload offer letter

+ Choose

No offer letter has been uploaded

How the offer was made

Please enter the following details and confirm how the offer was made.

On what date was the offer sent?

What form did the offer take?

Letter

Email

Who sent the offer?

To assist in future development, it would be helpful if you could indicate why you opted to send your own offer letter:

Save
Record Offer Sent >

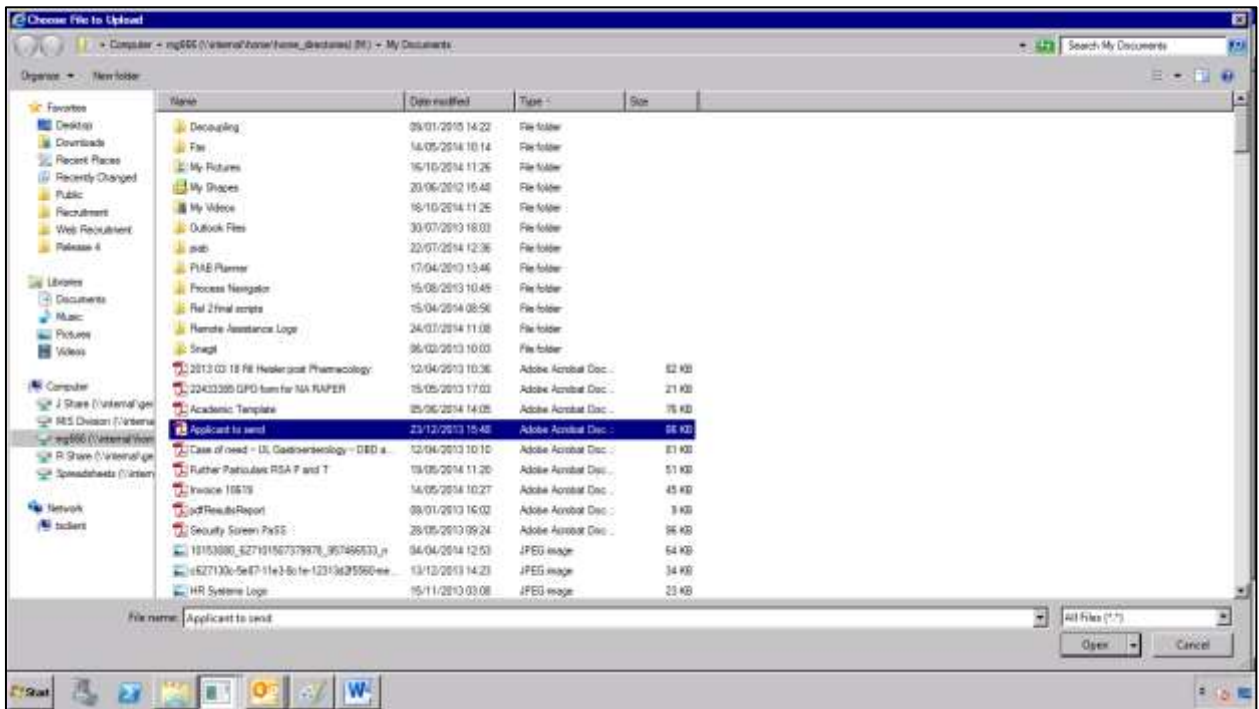
1. Click on the **Choose** button.

Upload offer letter

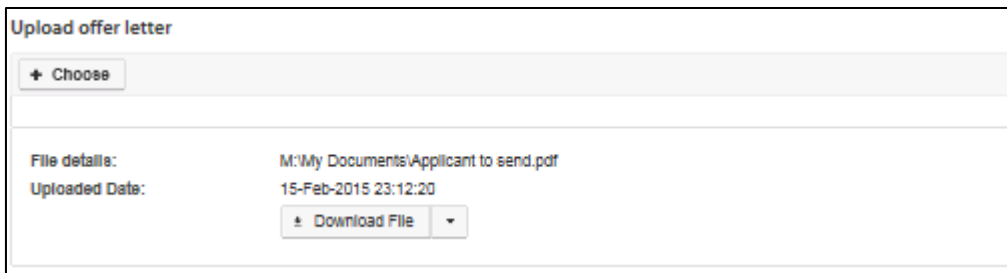
+ Choose

No offer letter has been uploaded

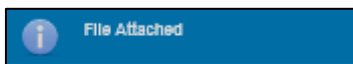
2. Select the offer letter file to be uploaded from your file directory.



3. Double-click on the file or click on **Open** and the offer letter file will be uploaded.



A pop up confirmation will also be displayed.



Please note that if you have accidentally uploaded an incorrect file you can select the **Delete file** action:



The system will then allow you to select and upload a replacement file.

4. Enter details of when the offer was sent, who sent it and the method used.

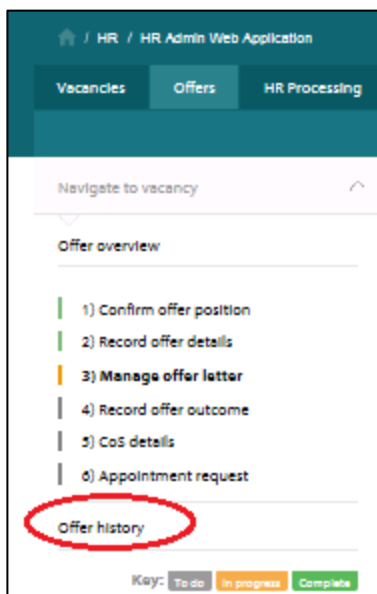
How the offer was made
Please enter the following details and confirm how the offer was made.

<p>On what date was the offer sent?</p> <input style="width: 100%;" type="text"/>	<p>What form did the offer take?</p> <p><input type="radio"/> Letter</p> <p><input type="radio"/> Email</p>
<p>Who sent the offer?</p> <input style="width: 100%;" type="text"/>	<p>To assist in future development, it would be helpful if you could indicate why you opted to send your own offer letter:</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>

Please also add details of why you opted to send a manual letter to help us identify any possible improvements to the Web Recruitment System.



You can look at the current offer letter and the offer letter history at any time by clicking on the **Offer History** menu tab.



See the section on [Viewing Offer History](#) for more details

7. Step Four - Recording the Outcome of the Offer

Once you have received a response to the offer from the successful applicant, use the **Record Offer Outcome** tab to document this.

Step 4: **Record offer outcome**

Offer acceptance

Offer acceptance

Please record whether this offer was accepted or not.

What was the outcome of this offer?

-- Select an outcome --

- Select an outcome --
- Conditional offer accepted
- Conditional offer rejected by candidate
- Conditional offer withdrawn by us

Record Offer Outcome

1. Select the relevant outcome from the drop down list.

What was the outcome of this offer?

-- Select an outcome --

- Select an outcome --
- Conditional offer accepted
- Conditional offer rejected by candidate
- Conditional offer withdrawn by us

Record Offer Outcome

2. Click on the **Record Offer Outcome** button.



If the offer has been rejected by the successful applicant, you can then revisit the offer details that you recorded in Step 2, making changes to any required details (e.g. selecting a different salary). You can then generate a new version of the letter to the applicant. The different versions of the letter that you send will be recorded in the **Offer history**.



You do not need to produce a new offer letter for a change in start date unless you have specific reasons for doing so (for example, the successful applicant requests a letter reflecting the change).



If you select '**Conditional offer withdrawn by us**' then you will not be able to make further changes and the offer process will end. You should only select this option where you no longer intend to appoint the individual concerned. Offers of employment are legally binding once accepted so please ensure that you seek advice from your [HR Business Manager/Adviser](#) before withdrawing any offer of employment.

3. In most cases, it is expected that you will record a response of **Conditional offer accepted**.

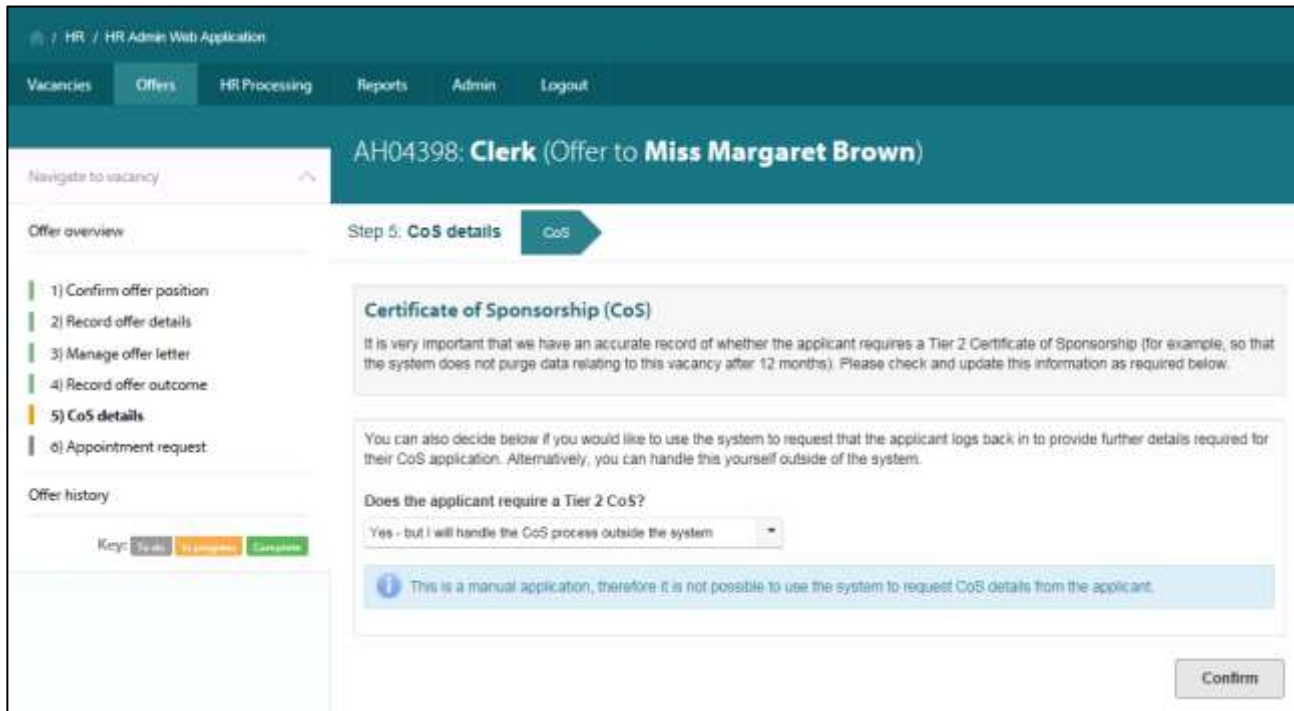
What was the outcome of this offer?

Conditional offer accepted

Once you have done so, you will be routed to Step 5 of the offers process, where you will be asked to confirm and record the CoS details.

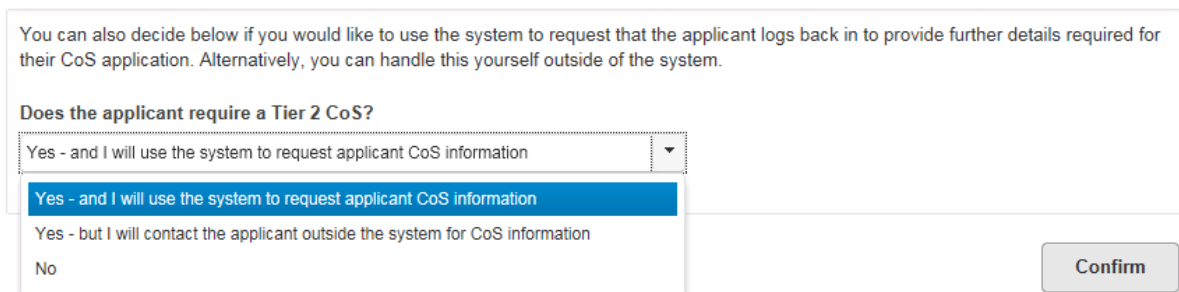
8. Step Five - Confirming the CoS Details

The next tab in the **Manage offer letter** is **CoS** details. Here you will confirm whether or not the successful applicant requires a Tier 2 Certificate of Sponsorship in order to obtain right to work in the UK.




The screenshot shows the 'Step 5: CoS details' screen in the HR Admin Web Application. The page title is 'AH04398: Clerk (Offer to Miss Margaret Brown)'. The left sidebar shows a progress indicator for 'Step 5: CoS details'. The main content area is titled 'Certificate of Sponsorship (CoS)' and contains the following text: 'It is very important that we have an accurate record of whether the applicant requires a Tier 2 Certificate of Sponsorship (for example, so that the system does not purge data relating to this vacancy after 12 months). Please check and update this information as required below.' Below this, there is a section titled 'You can also decide below if you would like to use the system to request that the applicant logs back in to provide further details required for their CoS application. Alternatively, you can handle this yourself outside of the system.' This is followed by a question: 'Does the applicant require a Tier 2 CoS?' with a dropdown menu showing the selected option: 'Yes - but I will handle the CoS process outside the system'. A blue information box states: 'This is a manual application, therefore it is not possible to use the system to request CoS details from the applicant.' A 'Confirm' button is located at the bottom right of the form.


1. Select the applicable value from the drop-down list following the question **‘Does the applicant require a Tier 2 CoS?’** and click on the **Confirm** button.



This close-up screenshot shows the dropdown menu for the question 'Does the applicant require a Tier 2 CoS?'. The menu is open, displaying three options: 'Yes - and I will use the system to request applicant CoS information' (highlighted in blue), 'Yes - but I will contact the applicant outside the system for CoS information', and 'No'. A 'Confirm' button is visible to the right of the dropdown.


 The drop-down menu shown above provides two options where the successful applicant does require a Tier 2 CoS. Either you will confirm that they need a CoS and that:


- You will be emailing them via the system to request that they log back in to their account to provide the information and supporting documents required for their CoS application; or
- You will contact the applicant outside of the system for the details and documents that you require for their CoS application.

 It is very important that you record accurately whether or not the successful applicant will be applying for a Tier 2 CoS. There are longer [retention periods for recruitment documentation](#) where a CoS is needed and the purging function within the system is based on your response in this step of the process.

2.

- a) If the response to the question was **No** then you will be directed to the next tab in the offer process, which will allow you to submit an online Appointment Request to the New Appointment Team.
- b) If the response to the CoS question was either of the **Yes** options, you will need to complete additional information related to the CoS.

 There are on-screen instructions within Step 5 to guide you through the CoS aspects of the process. If you require further guidance, the **Requesting Tier 2 CoS Information** user guide on the [HR Systems web pages](#) describes the process in detail for both CoS options (i.e. where the CoS details and supporting documents are collected online and where the communication with the applicant takes place outside of the Web Recruitment System).

 The [HR Systems web pages](#) also contain a two page quick reference guide to the online Tier 2 CoS information request process.

- 3. Once you have completed Step 5, you will be able to proceed to the final part of the process – **Step 6 Appointment Request.**

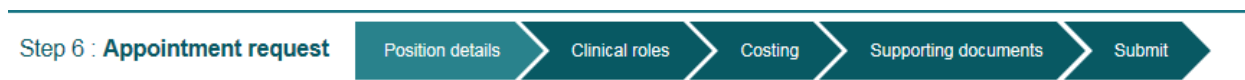
9. Step Six - Appointment Request

The next and final step in the offer process enables you to make an online Appointment Request to the New Appointment Team without the need to enter the details into the CHRIS Recruitment Module or to complete a CHRIS/10(A) New Appointment Form.

In order for the New Appointment Team to be able to process the appointment correctly, a small number of additional details are needed that have not been captured yet.

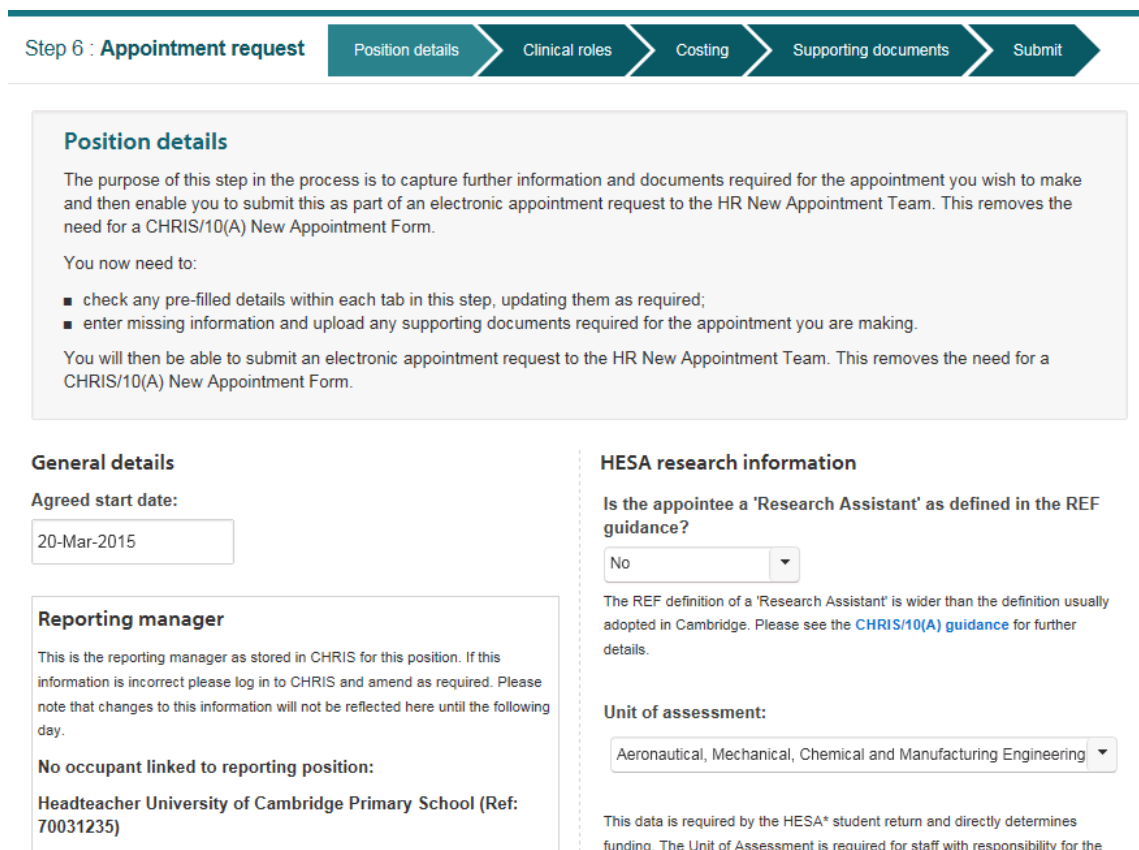
As with all of the other steps in the offer process, wherever information is available for the position in CHRIS, the values are defaulted on the screen so that you can check and confirm them.

There are five tabs to be completed for an Appointment Request:



9.1 Entering the position details

The first tab that will be displayed when you click on the **Appointment Request** menu item is the **Position details** tab.



Position details

The purpose of this step in the process is to capture further information and documents required for the appointment you wish to make and then enable you to submit this as part of an electronic appointment request to the HR New Appointment Team. This removes the need for a CHRIS/10(A) New Appointment Form.

You now need to:

- check any pre-filled details within each tab in this step, updating them as required;
- enter missing information and upload any supporting documents required for the appointment you are making.

You will then be able to submit an electronic appointment request to the HR New Appointment Team. This removes the need for a CHRIS/10(A) New Appointment Form.

General details

Agreed start date:

Reporting manager

This is the reporting manager as stored in CHRIS for this position. If this information is incorrect please log in to CHRIS and amend as required. Please note that changes to this information will not be reflected here until the following day.

No occupant linked to reporting position:
 Headteacher University of Cambridge Primary School (Ref: 70031235)

HESA research information

Is the appointee a 'Research Assistant' as defined in the REF guidance?

The REF definition of a 'Research Assistant' is wider than the definition usually adopted in Cambridge. Please see the [CHRIS/10\(A\) guidance](#) for further details.

Unit of assessment:

This data is required by the HESA* student return and directly determines funding. The Unit of Assessment is required for staff with responsibility for the


1. Enter details of the start date that has been agreed with the successful applicant using the date picker. This will be defaulted with any start date that you entered in Step 2.

General details


Agreed start date:

March 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

 **Please note:** if you are refilling an existing position, please ensure that any agreed start date you enter into the system is after the last day of the current/previous occupant’s employment (unless you have already made arrangements with the New Appointment Team for an overlap position to be created). If you do not do this, you will see the following warning message:

Start date:

 **The position is occupied on this date.**
Please email [New Appointments](#) and ask them to set up an overlap position, indicating the date on which you wish to appoint.

2. Review the details of the reporting manager for the position (as held in CHRIS).

Reporting manager

This is the reporting manager as stored in CHRIS for this position. If this information is incorrect please log in to CHRIS and amend as required. Please note that changes to this information will not be reflected here until the following day.

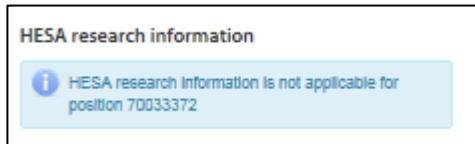
Mr John Smith

Functional Consultant (Ref: 70026358)

If the details are incorrect, they will need to be corrected in CHRIS. The [user guide for amending a reporting manager](#) is found on the HR Systems web pages.

- 3.

- a) If HESA (Higher Education Statistics Agency) research information is not required to be collected for the position, a message is displayed as follows:



- b) If HESA research information is required, then further fields will be displayed. Please complete these (as applicable).

HESA research information

Is the appointee a 'Research Assistant' as defined in the REF guidance?

The REF definition of a 'Research Assistant' is wider than the definition usually adopted in Cambridge. Please see the [CHRIS/10\(A\) guidance](#) for further details.

Unit of assessment:

This data is required by the HESA* student return and directly determines funding. The Unit of Assessment is required for staff with responsibility for the supervision of post graduate students. It is a requirement that all new academic and senior research appointments have the Unit of Assessment set. For the majority of Departments the Unit of Assessment can be defaulted but you may override this default value if you consider it to be incorrect. Where no default exists this will be shown as "no default". A list of default values can be found in the [CHRIS/10\(A\) guidance](#).



Please note that it is very important that this information is provided and that this is done so accurately, wherever applicable. The University is required to report to HESA annually on this data and it affects the funding that we receive.

4. Once you are satisfied that the details displayed on-screen are complete and correct, tick the check box to the left of **'The preceding details are now complete and correct'**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

5. Click on **Save and Next**. You will be routed to the next tab in the Appointment Request section.



You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

9.2 Entering clinical role details

Where a role has clinical duties, there is additional information that is required for the appointment.

Clinical roles

If this is a clinical role, then some further details are required.

Is this a clinical role?

Yes ▼

Please supply the following information

<p>Clinical contracts:</p> <p>--- Please select --- ▼</p> <p>Healthcare professional specialty:</p> <p>--- Please select --- ▼</p> <p>Is NMC registration required:</p> <p>--- Please select --- ▼</p>	<p>Medical registration number:</p> <p><input style="width: 100%;" type="text"/></p> <p>Clinical sub-specialty:</p> <p>--- Please select --- ▼</p> <p>Regulatory body:</p> <p>--- Please select --- ▼</p>
---	--

1. Confirm whether or not you are appointing to a clinical role, using the drop-down menu.


Is this a clinical role?

Yes ▼

--- Please select ---

Yes

No

 If a clinical grade was selected on the [Remuneration tab in Record offer details](#) (or defaulted to a clinical grade from CHRIS) then the default for the 'Is this a clinical role?' field will be set to **Yes**. Please amend the default as required.

- a) If **No** is selected, no further information is required on this tab.
- b) If **Yes** is selected then the following screen will be displayed so that you can enter the details that the University is required to collect for HESA:

Please supply the following information

<p>Clinical contracts: <input type="text" value="--- Please select ---"/></p> <p>Healthcare professional speciality: <input type="text" value="--- Please select ---"/></p> <p>Is NMC registration required: <input type="text" value="--- Please select ---"/></p>	<p>Medical registration number: <input type="text"/></p> <p>Clinical subspeciality: <input type="text" value="--- Please select ---"/></p> <p>Regulatory body: <input type="text" value="--- Please select ---"/></p>
---	---

- 4. Enter details of the type of **clinical contract** from the drop-down menu.

Clinical contracts:


--- Please select ---

--- Please select ---

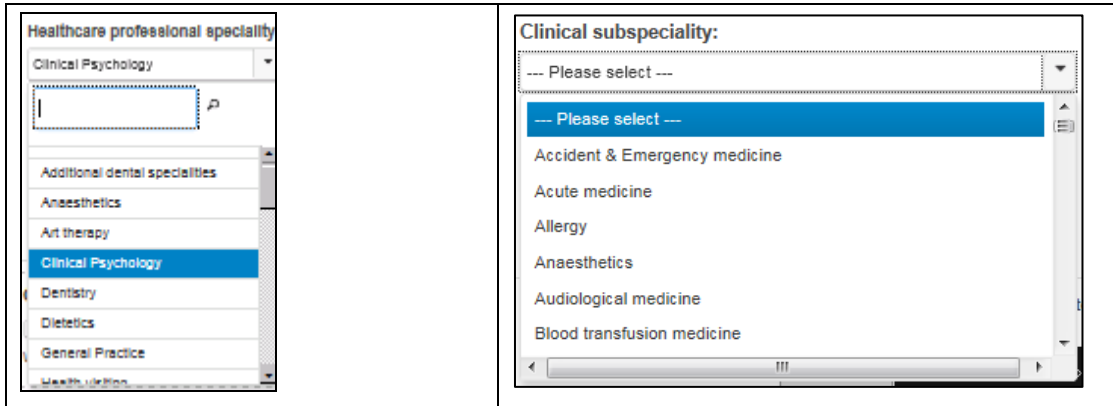
Honorary contract required (CRUK CRI)

Honorary contract required (Clinical Appointments)

No

 Please note that you must complete select that an Honorary Clinical Contract is required here in addition to this being listed as a required screening check in Step 2.

- 5. Enter the **Healthcare professional speciality** and **Clinical sub speciality** from the drop-down lists.

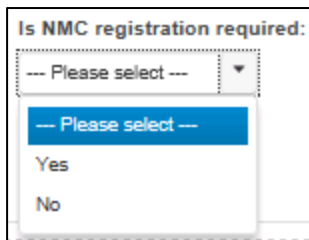


The image shows two side-by-side dropdown menus. The left menu is titled 'Healthcare professional speciality' and has 'Clinical Psychology' selected. Below it is a list of other specialities including 'Additional dental specialities', 'Anaesthetics', 'Art therapy', 'Clinical Psychology', 'Dentistry', 'Dietetics', 'General Practice', and 'Health education'. The right menu is titled 'Clinical subspecialty:' and has '-- Please select --' selected. Below it is a list of subspecialties including 'Accident & Emergency medicine', 'Acute medicine', 'Allergy', 'Anaesthetics', 'Audiological medicine', and 'Blood transfusion medicine'.



Note that the values listed are those supplied by HESA. If you find that the sub-speciality that you require is not in the list then please contact the [HR Analytics](#) team for advice.

- Use the drop-down list to indicate whether the successful applicant is required to be registered with the Nursing and Midwifery Council, that is, whether **NMC registration is required**.



The image shows a dropdown menu titled 'Is NMC registration required:'. The selected option is '-- Please select --'. The dropdown list is open, showing the following options: '-- Please select --', 'Yes', and 'No'.



Please note that you must record this requirement (as applicable) in addition to specifying NMC Registration as a screening check.

- Enter the successful applicant's **medical registration number**.



The image shows a form field with the label 'Medical registration number:' and an empty text input box below it.

- Enter details of the successful applicant's **Regulatory body** from the drop-down list.

Regulatory body:

--- Please select ---

- Health Care Professions Council (HCPC): excluding social workers in England
- Health Care Professions Council (HCPC): social workers in England
- Northern Ireland Social Care Council (NISCC)
- Royal College of Veterinary Surgeons (RCVS)
- Scottish Social Services Council (SSSC)
- The Nursing and Midwifery Council (NMC)
- The Pharmaceutical Society of Northern Ireland (PSNI)



Note that the values listed are those supplied by HESA. If you find that the value that you require is not in the list, please contact the [HR Analytics](#) team for advice.

- Once you are satisfied that the details displayed on-screen are complete and correct, tick the check box to the left of **'The preceding details are now complete and correct'**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

- Click on **Save and Next**. You will be routed to the next tab in the Appointment Request section.

Save **Save and Next >**



You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

9.3 Entering costing details

The next tab in the **Appointment Request** process is Costing. Here you will check and update the funding details for the appointment.

HR / HR Admin Web Application

Vacancies **Offers** HR Processing Reports Admin Logout

AH04398: **Clerk** (Offer to **Mrs Margaret Brownley**)

Navigate to vacancy ^

Offer overview

- 1) Confirm offer position
- 2) Record offer details
- 3) Manage offer letter
- 4) Record offer outcome
- 5) CoS details
- 6) Appointment request**

Offer history

Key: To do In progress Complete

Step 6 : Appointment request

Position details > Clinical roles > Costing > Supporting documents > Submit

Funding

Please supply or update the initial funding details for this appointment, as at the individual's start date. We do not need to know about future changes to funding here.

Please note:
if you make a significant change to funding details already listed below (for example, from a grant account code to a centrally-funded account code) this may invalidate the permission to fill granted for your vacancy and delay the processing of this appointment. Please consult your School Finance Manager for advice if you are unsure whether to proceed with a funding change.

The given funding totals 100 percent.

You may amend the provided details by clicking on the account code or percentage.

Funding details

100%

Type: OTHER
Code: * U.AH.AHBA.ABAA.CJEA.0000
Percent: * 100

[Remove](#)

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

[Save](#) [Save and Next >](#)

The funding displayed initially will reflect that held for the position in CHRIS and any details that were entered when permission to fill was requested in RAS.

The given funding totals 100 percent.

You may amend the provided details by clicking on the account code or percentage.

Funding details

100%

Type: OTHER
Code: * U.AH.AHBA.ABAA.CJEA.0000
Percent: * 100

[Remove](#)

1. If any of the funding details are incorrect then you can:
 - a) Click in the fields showing the **Code** or the **Percent** to edit them.

Type: OTHER

Code: *

Percent: *

Update the details and then click on the tick next to the field in order to save the changes.

b) Click the remove button next to the check in question:

Funding details

100%

Type: OTHER

Code: * U.AH.AHBA.ABAA.CJEA.0000

Percent: * 100

Remove

The funding entry will then be removed from the list.

- To add new funding details, select the **Funding type**, enter the **Account code** and the **percent** that this accounts for and click on **Add Funding**.

Funding type: Grant
 Other

Account code:

Percent: %

i You still need to account for 100% of the funding.

Add Funding

The new details will be displayed on the right hand side of the screen.

i The given funding totals 100 percent.

You may amend the provided details by clicking on the account code or percentage.

Funding details


100%


Type: OTHER


Code: * U.AH.AHBA.ABAA.CJEA.0000

Percent: * 100

Remove

 Please note that the funding details must total 100% or you will not be able to select **'save and next'**.

 Please also note that the funding details should reflect the funding that applies at the start of employment. Future funding details are not required.

 If you make a significant change to funding details already listed (for example, from a grant account code to a centrally-funded account code) this may invalidate the permission to fill granted for your vacancy and delay the processing of the appointment. Please consult your School Finance Manager for advice if you are unsure whether to proceed with a funding change.

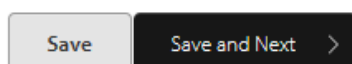
3. Once you are satisfied that the details displayed on-screen are complete and correct, tick the check box to the left of **'The preceding details are now complete and correct'**:


Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

4. Click on **Save and Next**. You will be routed to the next tab in the Appointment Request section.

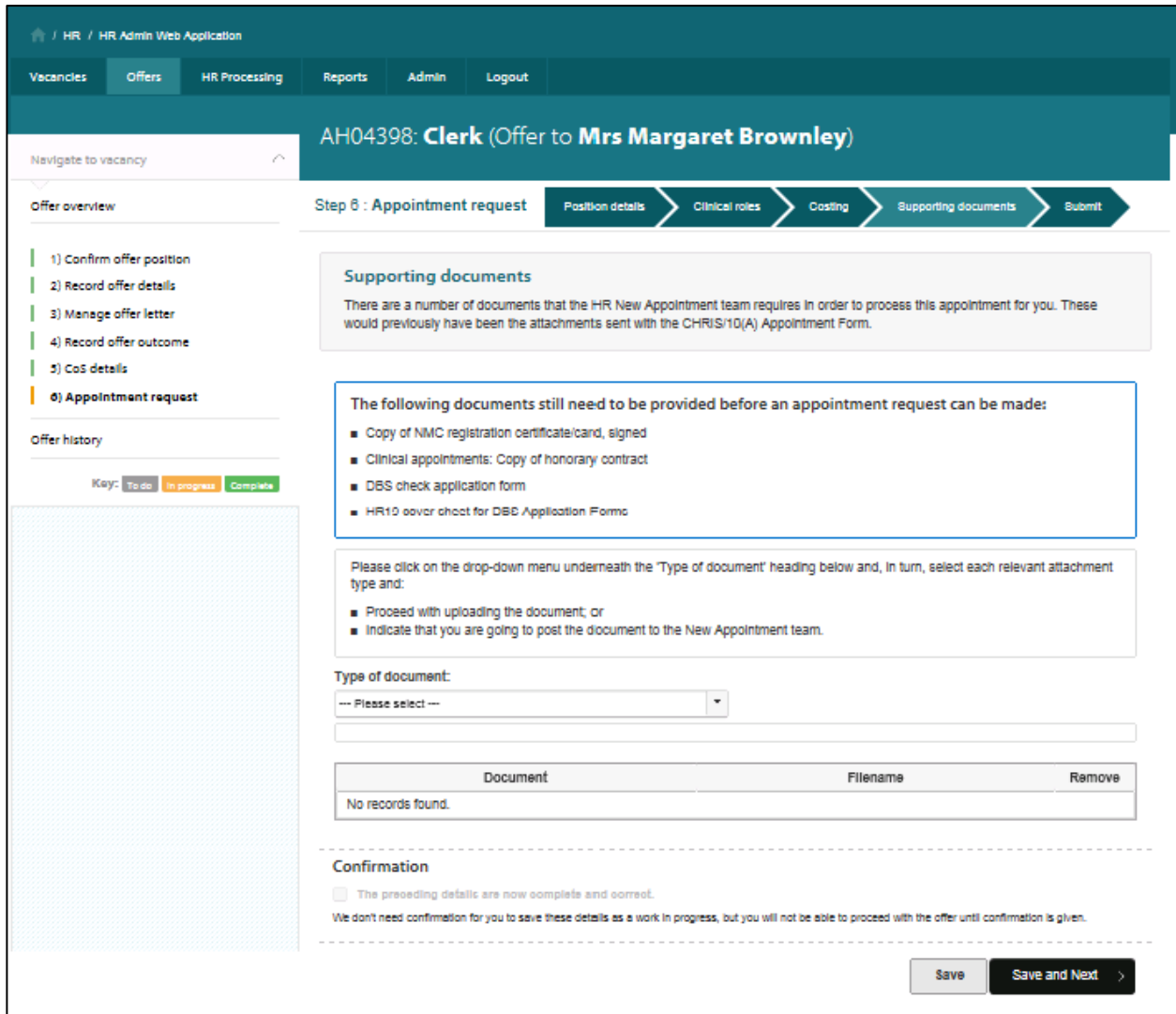


 You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

9.4 Adding details of supporting documents

The next tab in the **Appointment Request** process allows you to upload the required supporting documents or confirm that you have posted them to the New Appointment Team.



The screenshot shows the 'Supporting documents' step in the CHRIS HR Admin Web Application. The breadcrumb trail is: Home / HR / HR Admin Web Application / Vacancies / Offers / HR Processing / Reports / Admin / Logout. The current offer is AH04398: Clerk (Offer to Mrs Margaret Brownley). The process flow is: Position details > Clinical roles > Costing > Supporting documents > Submit. The 'Supporting documents' section contains the following text:

There are a number of documents that the HR New Appointment team requires in order to process this appointment for you. These would previously have been the attachments sent with the CHRIS/10(A) Appointment Form.

The following documents still need to be provided before an appointment request can be made:

- Copy of NMC registration certificate/card, signed
- Clinical appointments: Copy of honorary contract
- DBS check application form
- HR10 cover sheet for DBS Application Forms

Please click on the drop-down menu underneath the 'Type of document' heading below and, in turn, select each relevant attachment type and:

- Proceed with uploading the document; or
- Indicate that you are going to post the document to the New Appointment team.

Type of document:
 --- Please select ---

Document	Filename	Remove
No records found.		

Confirmation
 The preceding details are now complete and correct.
 We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

Buttons: Save, Save and Next >

1. Based upon the details you have entered in the Web Recruitment System during the offer process up to this point, the system displays a variable list of the supporting documents needed for the appointment.

Each of the documents listed on screen is mandatory for the appointment.

Supporting documents

There are a number of documents that the HR New Appointment team requires in order to process this appointment for you. These would previously have been the attachments sent with the CHRIS/10(A) Appointment Form.

The following documents still need to be provided before an appointment request can be made:

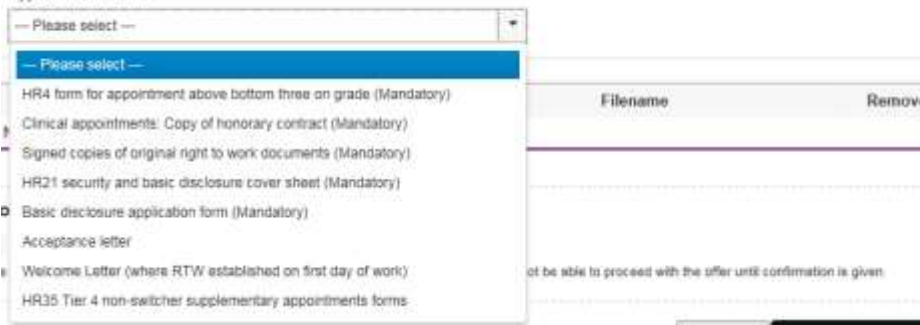
- HR4 form for appointment above bottom three on grade
- Clinical appointments: Copy of honorary contract
- Signed copies of original right to work documents
- HR21 security and basic disclosure cover sheet
- Basic disclosure application form

Further supporting documents that you may need to provide in certain circumstances are found in the drop-down list.

Add a supporting document

Please choose the type of document to add, and either upload it, or indicate that you are going to post the document to the New Appointment team.

Type of document:



1. For each of the mandatory supporting documents, select the document from the drop-down list.



- a) If you wish to upload an electronic copy of the document, click on **Upload a document** and then the **Choose** button.

Please click on the drop-down menu underneath the 'Type of document' heading below and, in turn, select each relevant attachment type and:

- Proceed with uploading the document; or
- Indicate that you are going to post the document to the New Appointment team.

Type of document:

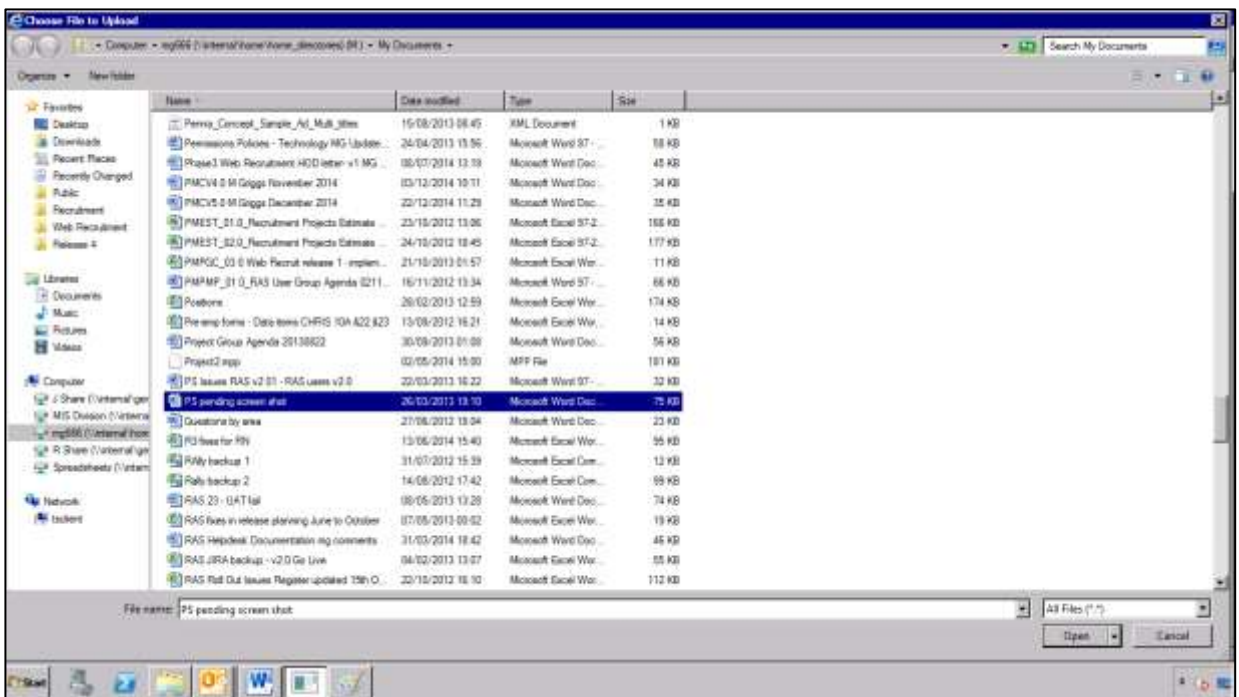
Copy of NMC registration certificate/card, signed (Mandatory) ▼

Upload a document

Add as document being posted to the New Appointment team

+ Choose


Select the required document from your file directory.



Double-click on the file or click on **Open**. The document will be added to the appointment request and this will be displayed on the screen.

Upload Successful M:\My Documents\PS pending screen shot.docx is uploaded.

Type of document:
 --- Please select ---



Document	Filename	Remove
Copy of NMC registration certificate/card, signed	M:\My Documents\PS pending screen shot.docx	

- b) To record that you are posting the document to HR, click on **Add as document being posted to the New Appointment team** and then click on the **Add** button.

Type of document:
 DBS check application form (Mandatory)

Add as document being posted to the New Appointment team

Details of the document being posted will be added to the Appointment Request and this will be displayed on the screen.

Document	Filename	Remove
Copy of NMC registration certificate/card, signed	M:\My Documents\PS pending screen shot.docx	
DBS check application form	Document posted	



Note that any documents listed as being posted will also appear on a downloadable cover sheet that can be printed off when [the request is confirmed](#) and sent to the New Appointment Team along with the posted documents.



Note that where there is no Appointment Committee, other accepted records of approval to appoint can be used for established positions.



Other accepted authorisations for salary determination (e.g. from the Vice-Chancellor for a Professorship) can be used in place of an HR4. Please see the [Determine the starting salary](#) of the Recruitment Guidance for information.

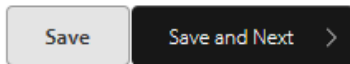
2. Once you are satisfied that the details displayed on-screen are complete and correct, tick the check box to the left of **'The preceding details are now complete and correct'**:

Confirmation

The preceding details are now complete and correct.

We don't need confirmation for you to save these details as a work in progress, but you will not be able to proceed with the offer until confirmation is given.

3. Click on **Save and Next**. You will be routed to the next tab in the Appointment Request section.



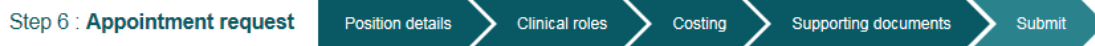
You can click on save at any point and the system will save the details you have entered so far.

If you wish to save and then return to the Offers process later, you will be able to navigate back to where you need to be via the Offer overview page. The colours on-screen will remind you which step you need to click back into.

9.5 Submitting an Appointment Request


The final tab in the **Appointment Request** is **Submit**. Here you submit an electronic request for an appointment to the New Appointment team.

This replaces the need for you to record details in the CHRIS Recruitment Module and return a CHRIS/10A New Appointment form.



Confirm appointment request

Please use the text box below to give any additional information to the New Appointment team that they will require to process this appointment correctly.

 Download Cover Sheet



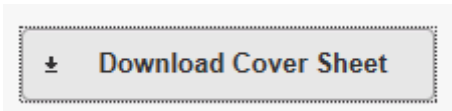
Confirmed tabs are ticked. Unconfirmed tabs are identified in red.

Additional Comments:

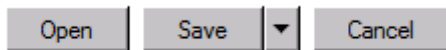
- Once you are satisfied that all required details and documents have been provided, please click on the Submit appointment request button below. This will send an electronic appointment request to the [New Appointment team](#). It replaces the CHRIS/10(A) New Appointment form.
- Please remember to post any documents that you are sending outside the system immediately.
- Failure to provide complete and accurate details and supporting documentation may delay the processing of an appointment. Please also note the [monthly deadline](#) for appointment requests.
- Please remember to follow any additional HR processes for your appointment, for example, requesting a health assessment or a research passport.

Submit appointment request


1. If you indicated on the previous tab that you are posting one or more supporting documents to the New Appointment Team, click on the **Download cover sheet** button. You will not need to do there are no supporting documents that you need to post.



2. Click on **Open** in the dialog box.



A cover sheet for your supporting documents will be downloaded.



New appointment - cover sheet for supporting documents

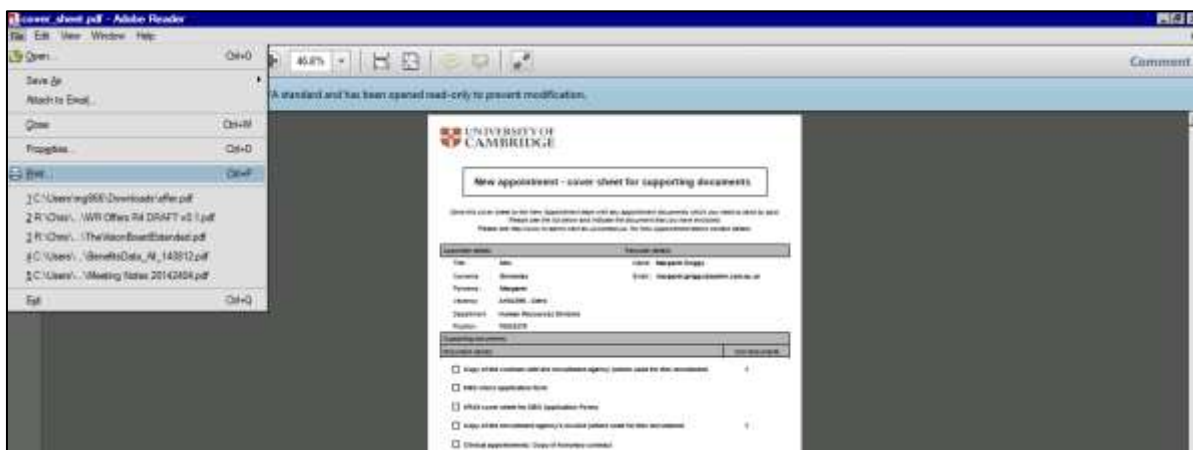
Send this cover sheet to the New Appointment team with any appointment documents which you need to send by post.
Please see the list below and indicate the document that you have enclosed.
Please see <http://www.hr.admin.cam.ac.uk/contact-us> for New Appointment teams contact details.

Appointee details		Recruiter details	
Title :	Mrs	Name:	Margaret Griggs
Surname	Brownley	Email :	margaret.griggs@admin.cam.ac.uk
Forename :	Margaret		
Vacancy:	AH04398 - Clerk		
Department:	Human Resources Division		
Position :	70033375		

Supporting documents	
Document names	Cos Documents
<input type="checkbox"/> Copy of the contract with the recruitment agency (where used for this recruitment	Y
<input type="checkbox"/> DBS check application form	
<input type="checkbox"/> HR19 cover sheet for DBS Application Forms	
<input type="checkbox"/> Copy of the recruitment agency's invoice (where used for this recruitment	Y
<input type="checkbox"/> Clinical appointments: Copy of honorary contract	

Page 1 of 1
16-Feb-15

- You can then use the standard functions within Adobe Reader (or other PDF reader) in order to print the document:



Once you have completed the rest of the steps in this part of the process, you will need to post the cover sheet with the supporting documents to the New Appointment Team. Failure to do so may result in a delay in the processing of the appointment.

- Check that all of the Appointment Request details have been added and that all of the tab statuses are green, otherwise you will not be able to submit the Appointment Request.



If any tab is red, click on it and enter the missing details (and/or confirm that the relevant screen is complete and correct by ticking the check box).

- Add any **Additional Comments** which you believe that the New Appointment Team will require in order to process the appointment effectively. For example, you may need to specify if one of the allowances/supplements to salary needs to be charged to a different cost code.

Additional Comments:

- Once you are satisfied that you have provided all of the details required for the appointment, click on the **Submit appointment request** button.

Submit appointment request

7. A message box will be displayed so that you can confirm the submission.

Confirm Submission

Documents to follow

You have indicated that the following documents will be posted to the HR New Appointment Team. Please ensure that you do this as soon as possible if you have not already done so:

Clinical appointments: Copy of honorary contract

DB 8 check application form

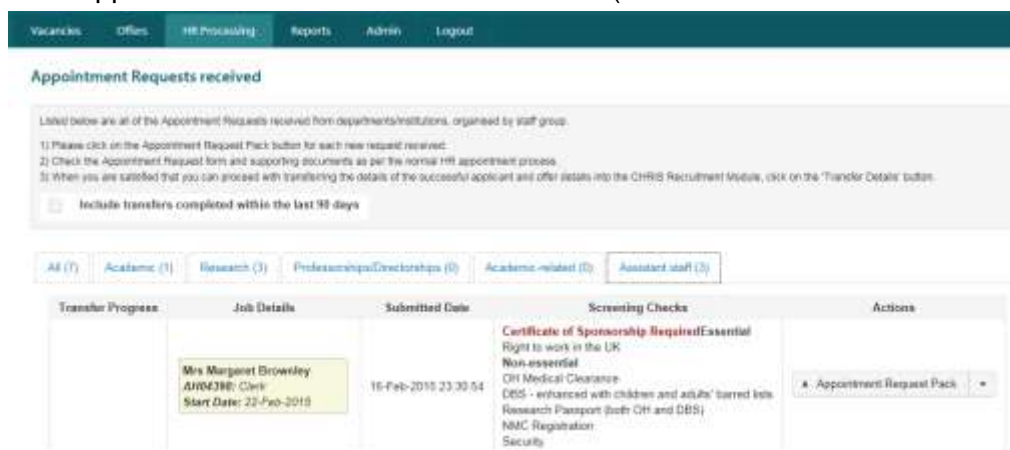
HR18 cover sheet for DB 8 Application Forms

You are about to submit this Appointment Request to the New Appointment Team for processing. Once submitted, you will not be able to amend this request.

Are you sure you wish to continue?

Click on the **Yes, submit appointment request** button.

Your request will appear immediately in HR’s section of the Web Recruitment System for the New Appointment Team to receive and action (as shown in the screen shot below).



The screenshot shows the 'Appointment Requests received' section in the CHRIS system. It includes a navigation bar with 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. Below the navigation bar, there are instructions for handling appointment requests and a filter for 'Include transfers completed within the last 90 days'. A table lists appointment requests with columns for 'Transfer Progress', 'Job Details', 'Submitted Date', 'Screening Checks', and 'Actions'. One entry is visible for 'Mrs Margaret Browley' with a submitted date of '16-Feb-2015 23:30:04'. The 'Screening Checks' column lists requirements such as 'Certificate of Sponsorship Required', 'Right to work in the UK', 'DBS - enhanced with children and adults' barred lists', 'NMC Registration', and 'Security'. The 'Actions' column shows a button for 'Appointment Request Pack'.



Please remember: you no longer need to transfer the successful applicant to the CHRIS Recruitment Module, record offer details there or return a CHRIS/10A form where you have followed Steps 1-6 of the offer and appointment process in Web Recruitment.

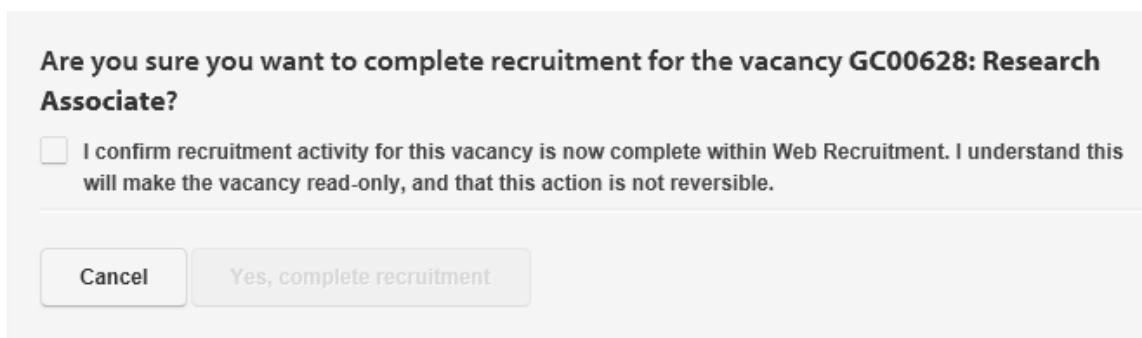


If your appointment requires any of the following, don't forget to follow the relevant HR processes outside of Web Recruitment that are separate from the Appointment Request process:

- Occupational Health checks (beyond the OHF30 Work Health Declaration);
- Research Passport; and
- Honorary Clinical Contract.

8. A pop-up will appear on your screen asking if you wish to complete recruitment for the vacancy.

Confirmation - Completion of activity in Web Recruitment





The screenshot shows a confirmation dialog box with the following text:


Are you sure you want to complete recruitment for the vacancy GC00628: Research Associate?

I confirm recruitment activity for this vacancy is now complete within Web Recruitment. I understand this will make the vacancy read-only, and that this action is not reversible.


Buttons: **Cancel** and **Yes, complete recruitment**


 'Completing recruitment' means confirming to the system that you will be not taking any further action in Web Recruitment for the vacancy that you have been working on. It has the effect of making the vacancy read-only and applying the appropriate part of the [University's retention policy for recruitment documents](#) to it.


 Once you confirm to the system that you have 'completed recruitment', it will purge any data which identifies unsuccessful applicants one year after the closing date for the vacancy (except where the successful applicant required a Tier 2 CoS when longer retention periods apply).

 You must 'complete recruitment' when you know that you:

- Will not be making any further offers or Appointment Requests for the vacancy (e.g. because you have made all of those you intend to make or because the vacancy has been withdrawn after an unsuccessful process); and
- Have no other actions to perform in the system (e.g. you have recorded outcomes for all stages of the process, sent all rejection correspondence and received references that you have requested using the system).

 The system will warn you if it looks like you may have other actions to take before completing recruitment yet by including relevant messages in the pop-up window. In the example below, the message is informing you that you have other positions attached to the vacancy that have not been filled yet.



 Not all positions for this vacancy have been filled.

- 9.
- a) When you are satisfied that you are ready to 'complete recruitment', tick the check box in the pop-up window and then click on **Yes, complete recruitment**.

Are you sure you want to complete recruitment for the vacancy GC00628: Research Associate?

I confirm recruitment activity for this vacancy is now complete within Web Recruitment. I understand this will make the vacancy read-only, and that this action is not reversible.

You will be returned to the Vacancies screen.

Vacancies

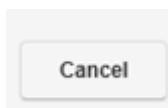
Below is a list of vacancies to which you have access. Use the search boxes or page through to find a specific vacancy.

Show vacancies with recruitment complete

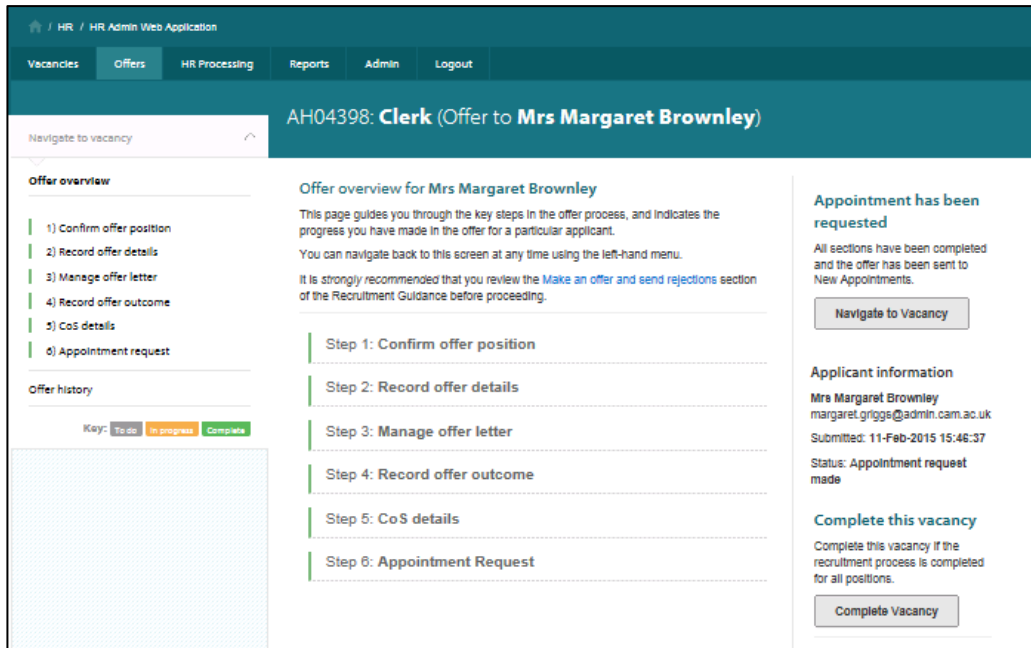
A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
00485	Accountant Clerk	Advert closed	19-Feb-2015	0	<input type="button" value="Manage Vacancy"/>	Administrator
AH00468	Computer Officer	Advert closed	19-Feb-2015	1	<input type="button" value="Manage Vacancy"/>	Administrator
AH00469	Computer Officer	Advert closed	19-Feb-2015	2	<input type="button" value="Manage Vacancy"/>	Administrator
AH00497	Computer Officer	Advert live	20-Feb-2015	0	<input type="button" value="Manage Vacancy"/>	Administrator
AH00505	Programming Officer(UAR)	Advert live	20-Feb-2015	0	<input type="button" value="Manage Vacancy"/>	Administrator

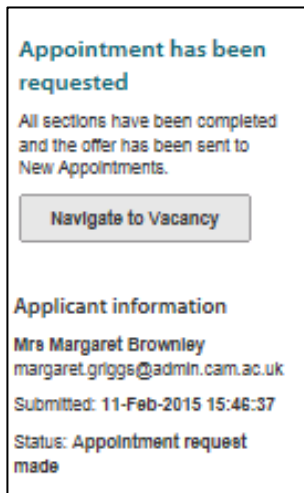
- b) If you are not yet ready to ‘complete recruitment’, click on the **Cancel** button in the pop-up window.



You will be routed back to the Offer overview screen.



Here, you will notice that the applicant's status will confirm the appointment request has been made:



You will also see that you can 'complete recruitment' from the Offer overview screen by clicking the **Complete Vacancy** button at the bottom right-hand side of the screen. You must do this as soon as you have finished your work on the vacancy.

Complete this vacancy

Complete this vacancy if the recruitment process is completed for all positions.


[Complete Vacancy](#)



It is very important that you do this so that the system can apply the correct purging process for the information and documents held by the vacancy. This drives compliance with data protection legislation and immigration requirements in relation to record-keeping. Please see the 'Managing vacancies and applicants' guide on the [HR Systems pages](#) for more details on completing recruitment.

10. If you navigate to a vacancy after you have completed recruitment, there will be an on-screen message to remind you that recruitment is complete.

Vacancy overview

 Recruitment is complete for this vacancy, it is now read-only.



If after completing recruitment you find that there is an unexpected action that you do need to take in relation to the vacancy, please contact the CHRIS Helpdesk.

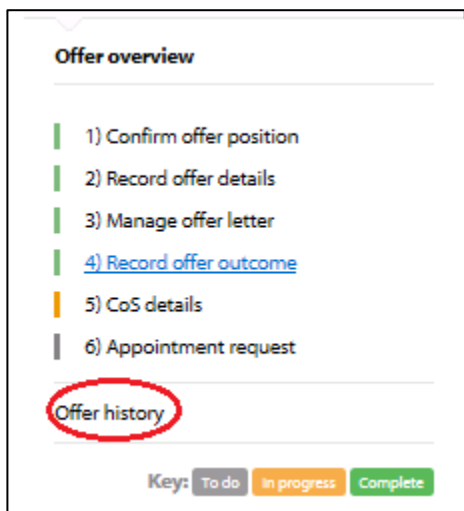
10. Viewing Offer History

A record is kept for each system-generated or manually uploaded offer letter that is recorded as sent.

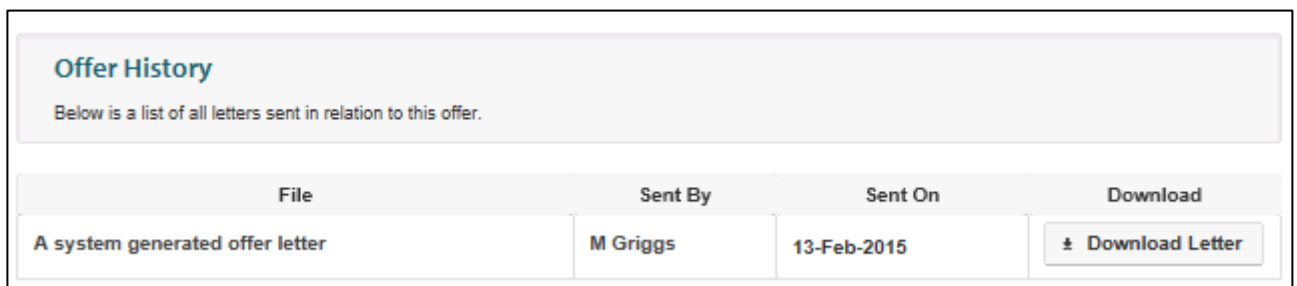
Changes made during the progress of one particular letter are not saved. The **Offer history** records only offers actually recorded as being made to the successful applicant.

To view the Offer History:

1. Click on the **Offer history** menu item on the left hand side of the screen.



2. A list of the offer letters recorded as having been sent to the successful applicant will be displayed.



The screenshot shows the "Offer History" section with the text "Below is a list of all letters sent in relation to this offer." Below this is a table with the following data:

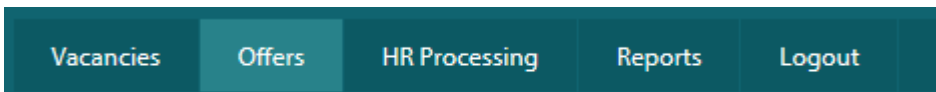
File	Sent By	Sent On	Download
A system generated offer letter	M Griggs	13-Feb-2015	Download Letter

The details recorded are whether the letter was system-generated or manual, who sent it, when and a copy of the letter.

11. Searching for an Offer

Follow the instructions below if you wish to search for an offer that you have started and then saved part-way through the process to return to later (for example, because of a natural pause between an offer being made and the outcome being known).

1. Click on the **Offers** tab at the top of the screen.



The Offers tab lists all of the offers for the vacancies to which you have access.

HR / HR Admin Web Application

Vacancies **Offers** HR Processing Reports Admin Logout

Offers in progress

This page allows you to manage offers across all vacancies to which you have access. Once an offer has been transferred to New Appointments it will not show on this list, to view completed offers use the option below.

Include applicants with the status Offer Complete

Offer Progress	Applicant Name	Job Title	Offer Details	Actions
<div style="width: 67%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 67%	Dr Steve Pinker	NM04199: 'Assistant'- 'Director of Research'	Status: Conditional offer accepted CHRIS Position: 70032903	Manage Offer
<div style="width: 34%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 34%	Mr Ajay Karamkantiy	AK04377: Administrative Officer[Unstb And Rtd]	Status: Conditional offer rejected by candidate CHRIS Position: 70033301	Manage Offer
<div style="width: 34%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 34%	Mr Simon Vitr	AH04389: SV Assistant CS test	Status: Active CHRIS Position: 70033318	Manage Offer
<div style="width: 0%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 0%	Mr Simon Vitr	AH04387: SV Assistant M test	Status: Conditional offer accepted CHRIS Position:	Manage Offer
<div style="width: 67%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 67%	Mrs Margaret Brownley	NQ04413: Cleaning Supervisor	Status: Conditional offer accepted CHRIS Position: 44113	Manage Offer
<div style="width: 0%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 0%	Mr Philip Hallwood	NS04258: Clinical Research Associate	Status: Active CHRIS Position:	Manage Offer
<div style="width: 67%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 67%	Mrs Helen Swift	LB04366: Chief Building Services Technician	Status: Conditional offer accepted CHRIS Position: 70033265	Manage Offer
<div style="width: 84%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 84%	Dr Forename Surname	JR04307: Sir Henry Dale Fellow	Status: Conditional offer accepted CHRIS Position: 70033170	Manage Offer
<div style="width: 0%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 0%	Miss Janet Smith	AH04029: Research Associate	Status: Active CHRIS Position:	Manage Offer
<div style="width: 84%;"><div style="background-color: #0070c0; height: 10px;"></div></div> 84%	Miss Margaret Browning	AH04398: Clerk	Status: Conditional offer accepted CHRIS Position: 70033373	Manage Offer

(1 of 6) 1 2 3 4 5 6 10

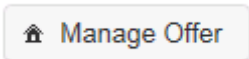
- By default, only offers where an Appointment Request has not yet been made are shown. If you would like these to show, tick the check box shown below:

Include applicants with the status **Appointment request made**

- Identify the offer you require by seeing it in the list or by applying a filter (i.e. type in the Applicant Name or Job Title field but do not press enter).

Offer Progress	Applicant Name	Job Title	Offer Details	Actions
67%	Mrs Margaret Brownley	NQ04413: Cleaning Supervisor	Status: Conditional offer accepted CHRIS Position: 44113	Manage Offer
84%	Miss Margaret Browning	AH04398: Clerk	Status: Conditional offer accepted CHRIS Position: 70033373	Manage Offer

- Click on the **Manage Offer** button.



You will then be directed to the Offer overview for the selected Offer:

Offer overview for Mrs Margaret Brownley

This page guides you through the key steps in the offer process, and indicates the progress you have made in the offer for a particular applicant.

You can navigate back to this screen at any time using the left-hand menu.

It is strongly recommended that you review the [Make an offer and send rejections](#) section of the Recruitment Guidance before proceeding.

Step 1: Confirm offer position

Step 2: Record offer details

Step 3: Manage offer letter

Step 4: Record offer outcome

Step 5: CoS details

This step allows you to send a CoS request to an applicant (if necessary)

[CoS details](#)

Step 6: Appointment Request



12. Exceptions to the ‘Standard’ Process

12.1 Under-appointments: Research Assistant/Research Associate

Where a job has been advertised as a “Research Assistant/Research Associate”, departments/institutions often wish to appoint a candidate as a Research Assistant pending award of their PhD, when he/she will become a Research Associate. The system provides facilities to generate an appropriate offer letter and make an Appointment Request in these circumstances.

You should read the section of the Recruitment Guidance on [Research under-appointments](#) before making such an appointment.

1. On **Step 1 Confirm offer position**, you should tick the box under “Appointment to be made as a Research Assistant, pending award of PhD”.

Position details

Please confirm the following details about the position to be appointed.

<p>Position to be appointed:</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">70032807: Research Associate ▼</div>	<p>Basis:</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Unestablished ▼</div> <p><small>Changing position basis may invalidate your permission to fill, cause errors in your offer letter, or delay the processing of your appointment. Please seek advice from the New Appointment team before making any such change.</small></p> <p>Appointment to be made as a Research Assistant, pending award of PhD:</p> <input type="checkbox"/>
--	---

2. On **Step 2 Record offer details**, you should enter a starting salary of Grade 5, point 38 on the **Pay** tab. The offer letter will automatically include the appropriate wording about the salary changing to Grade 7, point 39 upon award of PhD.

Grade:

Grade 5 ▼

Are you offering a salary in the contribution range? :

Grade point:

038 (£27,864) ▼

Guidance on determining the appropriate salary to offer to the successful candidate can be found in the [Determine the starting salary](#) section of the Recruitment Guidance.

3. On **Step 3 Manage offer letter**, you may wish to add other conditions to the offer letter in the “Extra Clauses” section to reflect any requirement that the person must obtain their PhD within a certain period of time.

12.2 Appointments still requiring a CHRIS/10 or CHRIS/10A Appointment Form

In some cases, it will not be possible for you to use the Web Recruitment System to generate an offer or an Appointment Request. This will normally be because:

- 1) You (or a colleague) used new RAS to request permission to fill but did not advertise the vacancy (for example, because an agency is being used as the sole means for sourcing candidates) or the vacancy was advertised but a decision was made not to invite online applications through the Web Recruitment System. As a result, there are no vacancy or applicant details within Web Recruitment for you to use in the offer and appointment process

AND/OR

- 2) The position being appointed to is one which has particular complexities that cannot currently be handled by the Web Recruitment System. These are as follows:
 - Munby Fellows;
 - Marie Curie Fellows;
 - Herschel Smith Fellows;
 - Library Invigilators;
 - Wellcome Trust Fellows;
 - UBSS technicians;
 - Cambridge Archaeological Unit;
 - Appointments where advertising is by a different department or institution; and
 - Ceremonial Offices.

Where scenario (1) described above applies, a CHRIS/10A will still be generated and issued to you by the New Appointment Team. You will still need to create an applicant record manually in the CHRIS Recruitment Module as described in the [Leavers and Recruitment Process user guide](#).

Where only scenario (2) applies (i.e. Web Recruitment has been used for receiving online applications but the vacancy is one of those listed above) then you will need to use the CHRIS/10 form, which is still available on the [HR Forms pages](#).



Please note that you can no longer transfer applicant details to the CHRIS Recruitment module from Web Recruitment.

12.3 Situations requiring a manual offer letter

There will be circumstances where the system-generated offer letter is not appropriate for an appointment. For example:



-
- If full-time assistant staff in your department/institution work additional hours in return for a higher holiday entitlement;
 - There are non-standard full time hours (e.g. 37 hours for assistant staff instead of the standard 36.5);
 - Where the person receiving the offer will be in receipt of salary protection; and
 - Appointments to a zero hours contract where the salary will not be shown properly.

In such cases, you will need to create an offer letter manually.