Web Recruitment Release 4, January 2015
Managing Vacancies and Applicants

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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:
Web Recruitment System – Managing Vacancies and Applicants

- 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 hrnewappointmentteam@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).

<table>
<thead>
<tr>
<th>Title</th>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guide for Selectors</td>
<td>User guide</td>
<td>A guide designed for selectors that describes the process of logging on to Web Recruitment, viewing and downloading application packs.</td>
</tr>
<tr>
<td>Managing Vacancies</td>
<td>User guide</td>
<td>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.</td>
</tr>
<tr>
<td>Tier 2 Certificate of Sponsorship – Requesting Applicant Details</td>
<td>Quick reference</td>
<td>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.</td>
</tr>
<tr>
<td>Tier 2 Certificate of Sponsorship – Requesting Applicant Details</td>
<td>User guide</td>
<td>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.</td>
</tr>
<tr>
<td>Generating Correspondence</td>
<td>User guide</td>
<td>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.</td>
</tr>
<tr>
<td>Generating Reports</td>
<td>User guide</td>
<td>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.</td>
</tr>
<tr>
<td>Managing Offers</td>
<td>Quick reference</td>
<td>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.</td>
</tr>
<tr>
<td>Managing Offers</td>
<td>User guide</td>
<td>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.</td>
</tr>
<tr>
<td>Overview of the Applicant Process</td>
<td>User guide</td>
<td>A guide for internal users of the Web Recruitment System that describes the process of making an online application from the applicant’s perspective.</td>
</tr>
<tr>
<td>Applicant Frequently Asked Questions (FAQs)</td>
<td>FAQs</td>
<td>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.</td>
</tr>
<tr>
<td>Administrator Frequently Asked Questions (FAQs)</td>
<td>FAQs</td>
<td>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.</td>
</tr>
<tr>
<td>Processing Appointment Requests</td>
<td>User guide</td>
<td>This guide is for the HR New Appointment team and describes how to find, check and process Appointment Requests from departments/institutions.</td>
</tr>
</tbody>
</table>
3. Setting Up Online Applications

To enable applicants for a vacancy to use the online application form, you need to take the following steps in new RAS:

1. Log on to new RAS and add/find a vacancy. The new RAS user guide can be found at:

   [http://www.lrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras](http://www.lrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras)

2. Progress as per the normal new RAS process until you reach Step 2 – Job Details. Here, you will see a new section relating to the application form:

   ![Application Form](attachment:image.png)

   **By default Apply Online will be set to ‘Yes’.** If for some reason you do not want applications for the vacancy to be made via the new Web Recruitment system then click on the ’No’ radio button.

The type of application form (CHRIS/5 Application for Employment or CHRIS/6 Cover Sheet for CVs) will be defaulted by RAS, in accordance with existing University policy (found at [http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-method](http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-method)), as follows:

- Academic – CHRIS/6
- Research – CHRIS/6
- Assistant – CHRIS/5
- Academic-related – CHRIS/5 or CHRIS/6; you have the option of stating the required form for this type of vacancy.
Click on the appropriate **Form Type**.

*Please note:* the Web Recruitment system will not allow applicants to add attachments a CHRIS/5 Application Form so they must not be asked to do so in job adverts. CHRIS/5 applications do not require attachments because all the details that any applicant would provide in a cover letter and CV are requested within the form. For example, the Suitability for the Role section should be used by an applicant to explain, using specific examples, how they meet the requirements for the role so a cover letter is unnecessary.

The number of referees for the vacancy will default to two. If you require the applicant to provide three referees then click on three:

![Number of Referees](image)

An extra space for the third referee will be displayed within the online application form.

3. **New RAS will look at the screening checks you have selected for the vacancy on Step 2 – Job Details to determine which sections of the online application form should be displayed for your vacancy.**

If you have selected any of the Disclosure and Barring Service (DBS) checks (or the position already has one selected and it remains applicable), whether essential before employment or not, then the Web Recruitment System will display a DBS section in the application form for applicants to complete information about any spent or unspent criminal convictions they may have.

If you have selected a basic disclosure (or the position already has this selected and it remains applicable), whether essential before employment or not, then the Web Recruitment System will display a basic disclosure section in the application form for applicants to complete details of any unspent criminal convictions they may have.

If you have selected a security check (or the position already has this selected and it remains applicable), whether essential before employment or not, then the Web Recruitment System will display a security section in the application form for applicants to complete.
4. In Step 5 – Advertisements, it is strongly recommended that you upload a HR7 Further Information document (formerly known as Further Particulars) to be displayed at the bottom of your University’s Job Opportunities pages advert. You do this by clicking on the Add further information file button before you add an advertisement.
Providing this information will ensure that prospective applicants have all the information they need to decide whether or not to apply for your vacancy. This file is also visible to referees to assist them in completing a suitable reference.

In addition, the HR7 Further Information template (http://www.hr.admin.cam.ac.uk/forms/hr7-further-information-template) contains a section which prompts you to inform applicants about:

- The online application process;
- Up to 5 documents that you would like applicants to upload in their application (CHRIS/6 forms only) such as a CV, covering letter and research publication lists;
- Who they should speak to if they have any questions about the vacancy.

5. When you preview your advert for a vacancy in RAS, you will be able to see wording which will be auto-inserted for you to direct applicants to:

- Click on the **Apply online** button (which will be inserted onto your Job Opportunities advert); or
- Click on a link to the Job Opportunities advert (which will be inserted into adverts in external media to route applicants to where they can find the Apply button):

The auto-inserted wording about how to apply online means that you do not need to include information in your advert about the application process. However, please ensure that you do provide details of the person applicants may contact if they have a question about the vacancy or selection process.
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Library Invigilator test (Maternity Cover)

**Department/Location:** University Library, Cambridge

**Reference:** VE02153

**Closing date:** 29 November 2013

Interesting and varied position

Maternity cover: This post is fixed-term until 31 January 2014 or the return of the post holder, whichever is the earlier.

Once an offer of employment has been accepted, the successful candidate will be required to undergo a health assessment.

To apply online or view further information please visit: [http://dev-jobs.internal.admin.cam.ac.uk/job/2492](http://dev-jobs.internal.admin.cam.ac.uk/job/2492)

Note: Once you have written your advert(s), it is essential that you set up the University Job Opportunities pages as a published media type in the Media Bookings section of new RAS. Without this, there will be no way for applicants to access the Apply button that they will need to click on to be routed to the Web Recruitment System and the online application form.

<table>
<thead>
<tr>
<th>MEDIA/PUBLICATION</th>
<th>DATE SENT</th>
<th>STATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Job Opportunities</td>
<td>Not published</td>
<td>![Publish, Freeze, Edit, Remove]</td>
</tr>
</tbody>
</table>

All other steps in new RAS not described here should be completed in the normal way. Please see the new RAS User Manual for further details. This can be found on the HR Systems Landing pages at: [http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras](http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras)

An Overview of the Applicant Process document has been created to provide a summary of how the online application works from the applicant’s perspective. This document is found on the [HR Systems web pages](http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras).
4. Logging In and Locating a Vacancy or an Applicant

4.1 Logging in to Web Recruitment

Use your Internet browser to go to https://hrsystems.admin.cam.ac.uk/hr-admin-ui/

💡 Tip: For future use, you may like to add the above link to your favourites in your browser or create a shortcut on your desktop.

💡 Tip: The system can also be found on the HR Systems landing pages at:

http://www.hrsystems.admin.cam.ac.uk/

1. The screen below will be displayed. Click on the link Log-in with Raven button to access the system.
2. Enter your Raven user-id and password.

The system will then use your Raven user-id to identify which vacancies should be displayed to you.
4.2 How to search for a vacancy in Web Recruitment

4.2.1 Search Option 1 – By status

1. Log in to the Web Recruitment System. The Vacancies Tab will display all the vacancies that you have access to.

2. By default all incomplete vacancies (i.e. those where the advert is still live and those where the selection/offers process is still in progress) are displayed.

You can display Completed Vacancies by ticking the box.

3. You can also choose to display only vacancies where the advert (and therefore online applications) has closed or where the advert is still live by selecting from the drop-down menu in the Status column.
4.2.2 Search Option 2 – Using the filters

Log in to the Web Recruitment System. The **Vacancies** Tab will display all the vacancies that you have access to.

At the top of the **Job Reference** column you will see a white search box. Enter data into this box to search for specific details on a vacancy.

There is no need to press enter on your keyboard when using the filters; just type into the field and the screen will filter automatically to provide a list all the data that meets your search criteria.
At the top of the **Job Title** column you will also see a white search box. Enter data into this box (without pressing ‘Enter’ on your keyboard) to search for specific details on a vacancy.

You see the screen filter automatically to provide a list all the data that meets your current search criteria.
4.3 How to search for an applicant in Web Recruitment

1. Log in to the Web Recruitment System. The **Vacancies** Tab will display all the vacancies that you have access to.

2. Click the **Find Applicant** button at the top left of the page
3. The Find Applicants window will be displayed. This will allow you to search for an applicant across all your vacancies by entering certain data, for example Forename, Surname, Date of Birth. Enter the data you wish to sort by and then click on the Search for Applicant button.

4. The results of your search will be displayed.

5. You can click on the ‘i’ icon under the Info column to review the submitted date, stage and status details of their application.
5 Managing vacancies

5.1 Introduction

If you are listed in RAS as the recruiter for the vacancy (i.e. if you were the person that requested permission to fill in RAS) then, initially, you will be the only person with the ability to access that vacancy. You will have Administrator access, which means that you can view and process applications.

Additional access of different levels can be added using the Permissions function. See the section on this topic for more details.

The vacancy list displays all the vacancies to which you have any form of access rights. The type of access you have will be shown in the right hand side of the table.

All vacancies that have not been marked as Recruitment Complete will not be displayed, unless you check the box to see these:

Please see the section on completing recruitment for further details.

You can also change the status to display only those vacancies where there is an Advert live (i.e. the closing date for applications has not yet passed) or vacancies with an Advert closed (i.e. the closing date for applications has passed).

To look at the history of filled vacancies (for example, to review the recruitment process the last time the job was advertised) then you can use the Job Reference and Job Title search boxes, or sort your
vacancies based on **Closing Date**. Remember to tick the **Show vacancies with recruitment complete** box, as required.

**Note:** To facilitate compliance with the University’s existing [retention policy for recruitment documentation](#), un-successful candidate data older than 12 months will be deleted from the system automatically, unless the successful candidate requires a Tier 2 Certificate of Sponsorship. This is because UK Visas and Immigration (UKVI) requires us to retain recruitment documents for 12 months or until a UKVI compliance officer has examined and approved them, whichever is the longer period.

Anonymised candidate information will also be retained for the purposes of equal opportunities trend analysis. In exceptional circumstances (e.g. because of ongoing legal proceedings), you must contact your HR Business Manager or the Head of Recruitment to agree that recruitment data may be kept for longer than the standard period. Once this has been agreed, the CHRIS Helpdesk will need to be instructed to add an exception flag to the vacancy along with a reason to prevent the data being deleted according to the normal purging schedule.

Once you have identified the vacancy you wish to view/manage, you can choose to give others access to the vacancy.

### 5.2 Giving others access to a vacancy

#### 5.2.1 Introduction – Web Recruitment roles explained

The ability to access a vacancy in Web Recruitment is granted on a vacancy by vacancy basis.

Initially, when the vacancy is imported from RAS, there will be a single **administrator** (admin) user granted access automatically: the RAS user for the vacancy. This person will be responsible for assigning user roles to others as required. People without a Raven password, such as people external to the University, cannot be granted system access. Any external members of appointing bodies will need to be emailed an application pack or provided with hard copies (please see section on [emailing an applicant pack](#) for details).

There are three different user roles for a vacancy that you can assign to anyone with a raven password. These are documented in the table below:
<table>
<thead>
<tr>
<th>Role</th>
<th>Available actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>READ:</td>
<td>Has the ability to:</td>
</tr>
<tr>
<td></td>
<td>• View applications and see what stage and status they are.</td>
</tr>
<tr>
<td></td>
<td>• View documents uploaded to the vacancy and applicant records.</td>
</tr>
<tr>
<td></td>
<td>• View all pending and completed correspondence.</td>
</tr>
<tr>
<td></td>
<td>• View at vacancy level whether any of the applicants have requested reasonable adjustments (but not which applicant).</td>
</tr>
<tr>
<td></td>
<td>• Create an applicant/referee report.</td>
</tr>
<tr>
<td></td>
<td>• Report on a vacancy.</td>
</tr>
<tr>
<td></td>
<td>• Generate an HR11 selection grid.</td>
</tr>
<tr>
<td></td>
<td>• View offers for a vacancy.</td>
</tr>
<tr>
<td>WRITE:</td>
<td>Same as above plus can:</td>
</tr>
<tr>
<td></td>
<td>• Change an applicant stage/status.</td>
</tr>
<tr>
<td></td>
<td>• Add notes to an application via the notes window (pending).</td>
</tr>
<tr>
<td></td>
<td>• Upload documentation to the vacancy and application.</td>
</tr>
<tr>
<td></td>
<td>• Configure a vacancy.</td>
</tr>
<tr>
<td></td>
<td>• Customise rejections and send rejection emails.</td>
</tr>
<tr>
<td></td>
<td>• Re-activate rejected candidates.</td>
</tr>
<tr>
<td></td>
<td>• Switch correspondence to manual.</td>
</tr>
<tr>
<td></td>
<td>• Download pdf rejection and reference documents.</td>
</tr>
<tr>
<td></td>
<td>• Preview, confirm or cancel a pending task.</td>
</tr>
<tr>
<td></td>
<td>• Request a reference.</td>
</tr>
<tr>
<td></td>
<td>• Manually upload a reference.</td>
</tr>
<tr>
<td>ADMIN:</td>
<td>Same as above plus can:</td>
</tr>
<tr>
<td></td>
<td>• Add, edit and remove manual applicants.</td>
</tr>
<tr>
<td></td>
<td>• Edit an applicant.</td>
</tr>
<tr>
<td></td>
<td>• Give others access to the vacancy by assigning one of the three user roles to them.</td>
</tr>
<tr>
<td></td>
<td>• See at applicant level which applicants have requested reasonable adjustments.</td>
</tr>
<tr>
<td></td>
<td>• View reasonable adjustments requested, in the Notes field for an applicant.</td>
</tr>
<tr>
<td></td>
<td>• Complete recruitment on a vacancy.</td>
</tr>
<tr>
<td></td>
<td>• Complete offer details and submit an Appointment Request to the New Appointment Team.</td>
</tr>
<tr>
<td></td>
<td>• Record that a CoS is required and request CoS details.</td>
</tr>
<tr>
<td></td>
<td>• View a CoS report.</td>
</tr>
<tr>
<td></td>
<td>• Cancel the CoS process.</td>
</tr>
</tbody>
</table>

Please note that:

- Functionality for making an Offer is restricted to ADMIN users;
- The process for transferring the successful applicant to the CHRIS Recruitment Module is no longer available to ADMIN users as this is now managed by the New Appointment Team;
- The CoS request function is now an integral part of the Offer process and hence the ability to request a CoS is only available to ADMIN role users; and
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- WRITE users can also now perform vacancy configuration for correspondence.

There are also four roles that can be applied to a user to give them system-wide permissions. These access levels can only be granted by a SUPER-USER, normally the MISD systems administrator or the CHRIS Helpdesk. They are designed for use by central HR teams and technical development and support.

<table>
<thead>
<tr>
<th>Role</th>
<th>Available actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW APPOINTMENTS:</td>
<td>Has the ability to receive new appointment requests for all areas, to view the applicant pack, the offer details, the CoS details and the appointment request form. Has the ability to transfer the successful candidate from the Web Recruitment System into CHRIS ready for further processing and appointment. Can also view the transfer status and investigate or dismiss any errors.</td>
</tr>
<tr>
<td>SUPER-USER:</td>
<td>Has ADMIN level permission to all vacancies in the system, including the ability to change the retention policy for a vacancy.</td>
</tr>
<tr>
<td>SUPER-READ-ONLY:</td>
<td>Has READ level permission to all vacancies in the system.</td>
</tr>
<tr>
<td>REPORTER:</td>
<td>Used by reporting system. Will have an associated list of organisational units on which they can report using Discoverer.</td>
</tr>
</tbody>
</table>

5.2.2 Assigning Access Rights

To grant other access to a vacancy you are administering:

1. Click on the Manage Vacancy button next to the vacancy.

![Manage Vacancy](image)

2. The Vacancy Overview screen will be displayed. Select Permissions.
The **Vacancy Permissions** screen will be displayed:
3. Click on the ‘Add new user’ button.

A new row will appear as shown below.
4. Add the CRS-ID (e.g. aa999) for the person you wish to give access to the vacancy and select a user role for the person.

Roles within the Web Recruitment System are explained at the start of this section.

5. Click on Save permissions, or click on the Add new user button again to add an additional user.

Note: The CRS-ID is being checked against the CHRIS system to identify the email address for the user. If there is not email address in CHRIS you will need to get the user to contact the CHRIS Helpdesk to resolve this before you can add them. Only the CRS-ID is shown (not the name) so please ensure that it is accurate otherwise the person you have selected will not be able to see the vacancy in the Web Recruitment System.
5.3 Storing recruitment documents and notes against a vacancy

5.3.1 Uploading and storing vacancy documents

You may find it helpful to store documents relating to the recruitment process for a vacancy within the system so that you have everything saved in one place. For example, you may like to upload the following documents for a vacancy:

- HR7 Further Information template (http://www.hr.admin.cam.ac.uk/forms/hr7-further-information-template);
- HR6 Selection Criteria template (http://www.hr.admin.cam.ac.uk/forms/hr6-selection-criteria-template);
- HR11 Selection Results Grid (http://www.hr.admin.cam.ac.uk/forms/hr11-selection-results-grid);
- HR15 Selection Process Schedule (http://www.hr.admin.cam.ac.uk/forms/hr15-selection-process-schedule).

Tip: Store documents against a vacancy if they relate to the job, the recruitment process or multiple applicants. Store documents against an applicant if they relate to one applicant only.

Please note: under Data Protection legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system or elsewhere) contains appropriate information which demonstrates that a fair, objective process took place. It is strongly advised that you complete the University’s online training on data protection (http://www.training.cam.ac.uk/cppd/event/1208963) if you have not done so already and you are going to have WRITE or ADMIN access in Web Recruitment.

To upload such documents to a vacancy that you are administering:
1. Click on the **Attachments** option.

   ![Attachments Option](image)

   The **Vacancy Attachments** screen will be displayed. This includes information about the types of file that can be uploaded.

2. Click on **Choose**. Your file directory will then be displayed.
3. Select a file to be uploaded and click on **Open**.

The file name will be displayed on screen.

The document will then be uploaded. The time and file name will be displayed as shown below.

![Document Upload Screenshot]

**Tip:** To check the file content, click the **Download File** button in the action field. To delete the document, select the **Delete File** option in the action field.
5.3.2 Recording vacancy notes

You are able to add notes against a vacancy, which provide an auditable trail of information. You may wish to use this function to record that key events have taken place in the process, particularly where there is more than one person providing administrative support for a vacancy. For example, you may wish to record the date that short-listing will be completed by the Appointing Body, that you have sent invite to interview letters out or that you have booked a particular room for interviews. Information about individuals should not be recorded here - you can also add notes to individual applicants (see the section on adding notes to an applicant’s record).

1. Click on the Notes option.

The Vacancy Notes screen will be displayed.
2. Enter your note in the **New Note** text box.

3. Click on **Add Note**. The details of your note, the date it was added and your CRS-ID will appear in the table underneath.
5.4 Viewing the advert/further information for the vacancy

1. If you want to remind yourself of the advert details when reviewing applicants, you can click on the View Advert option from the drop-down menu.

This will display the text from the University Job Opportunities advert for the vacancy.

The HR7 Further Information document (if published with the advert on Job Opportunities) is also shown underneath the advert.
4. Managing Applicants Through the Selection Process

6.1 Introduction

Applicants can be managed through the stages of the selection process, and actions undertaken in relation to applicants, by making use of the facilities within the Process Applicants screen.

1. From the main vacancy listing screen, select the vacancy you wish to process and click on Manage Vacancy button.

2. Select Process Applicants.

The applicants screen will be displayed with the Received tab selected. This shows all applications that have been received but a decision on them (e.g. that a particular application has been rejected) not yet recorded in the system.
You can view all applications at other stages in the process by clicking on the relevant tab.

The **All** tab shows all applicants for the vacancy, stating the stage they have reached (e.g. short-listing) and their status (e.g. rejected).
6.2 Adding, Sharing and Reviewing Applications

6.2.1 How to view PDFs of applications for a vacancy

You can view a PDF of an individual, selected or all applications for a vacancy.

1. To view an individual application, click on **Download Application** next to the relevant applicant.

   ![Table of applications](image)

   A pop-up window will appear, showing a PDF of the application(s).

   **Note:** If you are using Internet Explorer and experience any error messages when viewing a PDF, this is likely to be due to an issue with plug-ins on your PC. If this occurs, a workaround is to download the file and then open it from your file system. This will bypass the Adobe plug-ins for Internet Explorer.

2. To view multiple applications (either a selection or all applications), tick the box to the left of the relevant applicants names or click on the select all box, as shown below.

   ![Selection of applications](image)

   3. Click on the **Download Applications** button.
Your browser will then prompt you to save or open the pack.

4. Select Open.

A PDF/A pack of the application will be displayed, which will include the applicants’ application forms and, in the case of a CHRIS/6 form, any attachments they provided.

The PDF/A can be printed using File/Print.

Note: The Equal Opportunities and Request for Reasonable Adjustments sections of the application form are not displayed in this PDF. They have been automatically separated out by the system as this information must not be used as part of the selection process.

Note: If you are using Internet Explorer and experience any error messages when
viewing a PDF this is likely to be due to an issue with plugins on your PC. If this occurs a workaround is to download the file and then open it from your file system and this will bypass the Adobe plugins for Internet Explorer.

5. To look at a bookmarked version of the PDF, click on the bookmark icon in the left hand menu as shown below.

You can then see the documents in the pack listed separately by applicant.

You can click on any applicant or document to go directly to their application form or attachments.
A number of departments/institutions provided feedback that they want to be able to view applications as soon as they are submitted so that short-listing can be conducted on a staggered basis. The system has been designed to meet this requirement but you should be aware that this means that:

- Appointing bodies must carry out benchmarking once the closing date has passed to ensure that they have assessed all applications consistently. Only then should applicants be informed of the results. Please see the Recruitment Guidance for further information.
- Applicants cannot amend their application themselves once they have submitted it. Departments/Institutions can amend contact details, add notes and update a successful applicant’s details before transferring to CHRIS.

### 6.2.2 Viewing reasonable adjustment requests

As explained in the Recruitment Guidance, we have a legal duty to make reasonable adjustments to the recruitment process for applicants with a disability. In the online application form, applicants with a disability are invited to request any reasonable adjustments that they may need.

Where an applicant makes such a request, this will not be shown in their application form. This is so that information about their disability or the adjustments that they require are only shared with those making selection decisions when accommodating the type of request they have made makes this unavoidable.
Where one or more applicants for a vacancy have requested a reasonable adjustment, this is indicated on the vacancy screen with a red asterisk (*) next to the number of applicants.

Only those with Admin access to a vacancy can view reasonable adjustment requests. Any recruiters who have only been granted Read or Write access to a vacancy are responsible for checking with a colleague with Admin access if there is anything that they need to be aware of in order to accommodate a reasonable adjustment request. Those with Admin access are responsible for checking for reasonable adjustments, ensuring that they are put into place and only sharing the information with colleagues as far as is required to accommodate the adjustment.

Those with Admin access will be able to see which applicants have requested a reasonable adjustment by clicking on Process applicants - the notes field next to the relevant applicant will show an asterisk (*) next to the number of notes.

The reasonable adjustment request made can then be viewed by those with Admin access by completing the following steps:

1. Select Manage Vacancy from the vacancies list and then the Process Applicants option.

   The applicant(s) who has made a reasonable adjustment request will be indicated by a red asterisk in the Notes column.
2. Click the drop down arrow to the right of Download Application and select the Add/View Notes option from the menu.

3. The application notes will be displayed. This will include any notes added to the vacancy.

4. If the applicant is invited to the next stage of the selection process, you will need to ensure that the reasonable adjustments that have been requested are put into place. If you need advice on accommodating a reasonable adjustment, please contact your HR Business Manager/Adviser.

6.2.3 Adding an applicant to a vacancy

In certain circumstances, an applicant may be unable to apply online (for example, because they have a disability which means that they cannot use our system).

Where this is the case, applicants are instructed to contact the relevant department/institution to request the application form in a medium that they can use. Whilst the Web Recruitment System is in the process of being implemented across the University, electronic copies of the CHRIS/5...
Web Recruitment System – Managing Vacancies and Applicants

and CHRIS/6 forms will still be available on the HR web pages at http://www.hr.admin.cam.ac.uk/forms

Information on providing application forms in alternative formats is found at http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-process/alternative-formats

Please note: once a non-online (manual) application has been submitted to you, basic details about the applicant must be entered onto the Web Recruitment System and attachments uploaded (such as a PDF scan of the application). This ensures that:

- There is a full audit trail for your selection process stored in one place;
- You will be able to use the offer process and make an Appointment Request for the applicant (if he/she is successful) in Web Recruitment;
- The New Appointment Team will be able to transfer the applicant’s details into CHRIS;
- The Compliance Team will have access to a complete set of applications/CVs in the system for those who reach the final selection stage, as required for the Resident Labour Market Test when the successful applicant requires a Tier 2 CoS; and
- The University has complete equal opportunities data.

To record an applicant who has not applied online:

1. Select the vacancy to which you would like to add an applicant. Click the drop down arrow on the Manage Vacancy button then click on Manage Manual Applicants on the menu to the left:

   The following screen will be displayed:
2 Click on the **New** button and the following screen will be displayed:
This screen has two tabs. The first tab, Manual Applicant Entry, allows you to enter a minimum amount of essential information about the applicant. This includes details such as title, name, address, right to work status and equal opportunities information.

The screen shows the vacancy details on the right hand side.

Please check that you are editing the correct vacancy.

💡 Tip: At any point during the process, you can click on the Save button to save the details entered so far and then return to the form later.
3 Select the title for the applicant from the drop down list:

This list is a subset of the titles that are acceptable within the CHRIS system. Choose the value that most closely corresponds to the details provided by the applicant.

4 Enter the applicant’s given name (forename) and family name (surname). These fields are free format text fields.

5 Enter the address details for the applicant. A number of the fields (such as Town and Country) are mandatory.
6 Enter the remaining details for the applicant, including right to work details, contact details and equality and diversity information.

Note: The Equal Opportunities section is mandatory but there is a Prefer not to say option for each question. This should only be used if the applicant used this response or left a field blank (the downloadable CHRIS/5 and CHRIS/6 forms tell applicants that any blank response will be treated as Prefer not to say). Entering an accurate value is important for monitoring our Equal Opportunities policy and for meeting the University’s obligation to provide the Higher Education Statistics Agency (HESA) with complete and accurate anonymised employee data.

7 Click on the Save button if you would like to save your work and go on to add an attachment, or return to complete the applicant’s details at a later time.

8 To upload attachments for an applicant, click on the Save and Next button.
9 This will take you to the **Upload Documents** tab to upload an attachment for an applicant. If you have received a paper-based application then you can scan it and save it as a PDF for upload, or if you have received an application by email then you can save it and upload it.

You can upload documents in any of the following file formats:

- Pdf
- Doc and Docx (Microsoft Word Format)
- Generic Rtf
- Txt
- Ppt and Pptx (Microsoft Power Point)

**Note:** It is highly recommended that PDFs are uploaded wherever possible. A maximum limit of 4MB is permitted per file with a limit of five files totalling no more than 20MB per application. Limits are set because there is a limit to the size of attachments that can be sent via email. Selection panels/appointing bodies may need to be emailed an applicant pack (including all applications and their attachments) and so limits have to be set with regards to uploaded documents to facilitate this process.

10 To upload a document, click on the **Choose** button.
11 Navigate to the correct location in your file directory and select the file that you wish to upload before clicking on Open.

12 When the file has finished uploading, the file name will appear in the file list. Do not continue click on any buttons or navigate away from the screen until this has happened.
From here you can see the time and file name of your upload, and you can also download a copy of the document or delete the file.

To view the uploaded document, click on the Download File button in the Action field.

Your browser will prompt you to save or open the file.

💡 Tip: If you have uploaded an incorrect document then click on the Delete File option and the file will be deleted.

13 When you have entered details of the applicant and uploaded any attachments, return to the Manual Applicant Entry page and click on Submit Application to register the application against the vacancy.

The applicant should now appear under received applications when the Process applicants menu item is selected in the vacancy. The application will initially be given a status of Received.

6.3 Sending out application packs and application-related information

If members of the appointing body are unwilling for you to give them access to view applications within the Web Recruitment System, or if they are external to the University, you can distribute copies of applications to them by downloading and printing an application pack OR by emailing an application pack.
Depending on the stage of the selection process, you may need to provide them with all or a selection of applications. Therefore, you will need to select the applicants whose applications you wish to download into the pack by ticking on the box to the left of each one.

![Candidate selection](image)

You can select all applicants on a page by clicking on the select all box at the top left of the table of applicants.

6.3.1 Downloading an applicant pack

Once you have selected the applicants you want to feature in the pack, click on the Download Applications button at the top of the screen.
Your browser will then prompt you to save or open the pack.

Select **Open** or **Save** as required. You will be able to print the pack as necessary, although other options should be explored first to avoid wasting paper.

### 6.3.2 Emailing an applicant pack

Once you have selected the applicants you wish to feature in the pack, click on the **Email Applications** option at the top of the applicant list.

An email will then be sent to your account which has an attachment with the selected applicants’ details.

**Note:** The generated pack will reflect the format of the application form for the vacancy. For example, where the vacancy uses a CHRIS/6 form then, for each applicant, the pack will consist of the application form followed by the attachments the applicant has submitted (such as a CV, covering letter and list of research publications) in the order that the applicant uploaded them. If you require documents to be in a particular order, please instruct your applicants on this in your [HR7 Further Information document](#).
All attachments are converted to PDF/A format as an applicant submits them. The application pack will therefore be a multi-page PDF file which should be accessible to most people regardless of their local PC environment.

Note: As the CHRIS/5 form is five pages in length, an additional blank page has been appended to the back of the application form so that if a pack is printed a second applicant’s data is not on the back of the first applicant’s form.

Note: Various email systems have different limits on email sizes. Where there are a greater number of applicants, or where applicants have submitted more attachments, you may need to send several emails to circulate the applications for a vacancy.

6.3.3 Creating a selection grid

A selection grid can be generated and downloaded from the system for selectors to record the results of a selection activity or stage in the process. The grid is a version of the HR11 Selection Results Grid which is pre-filled with the names of applicants who are at the selection stage you are currently in (i.e. the tab you are in when you create the grid). It also includes the applicant’s right to work status (i.e. whether or not they are a settled worker) so that, when completed, the grid can be used as evidence of your selection process for the Resident Labour Market Test (where the successful applicant requires a Tier 2 CoS).

1. If you want to create a selection grid, click on the Create Selection Grid option from the drop-down menu found before the list of applicants within the relevant selection stage tab.

2. Select the format for the grid.
3. Click on **Generate Report**.

This will display the selection grid in the format you selected.

---

### Selection Results Grid

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Status</th>
<th>Selector Criteria Score</th>
<th>Total for Essential Criteria</th>
<th>Total for All Criteria</th>
<th>Decision and Comments/Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr Patrick Smith</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can now save or print the grid for use by the selectors.

#### 6.3.4 Generating applicant and referee reports

Please see the Web Recruitment manual on Generating Applicant and Referee reports on the [HR systems web pages](#) for details of how to generate reports to use for mail merging, selection and reporting.

#### 6.4 Updating applicant records and their progress

When you are within one of the stage tabs for a vacancy, there are a number of actions that can be carried out on an individual applicant basis:

- Updating the stage and status of applicants;
- Editing the personal details of applicants;
- Adding attachments; and
- Adding notes.

The following sections describe these processes.

##### 6.4.1 Updating selection stages and statuses

An individual with Admin or Write access to the vacancy is responsible for recording the details of the selection process and moving applicants between stages. It is a department/institution decision as to whether a member of an appointing body is given this level of access to record decisions made during each stage of the selection process, or whether this is done on their behalf.

A number of stages have been defined and these are:

- Application Received (Received);
- Progressed to Short-listing (Short-listing);
- First Selection Stage (Selection One);
- Second Selection Stage (Selection Two);
- Third Selection Stage (Selection Three);
- To be considered by Appointments Committee/Board of Electors (Committee/Board); and
- Offer in progress (Offer).

The brackets in the list above indicate the abbreviated name of each stage as it shows on the tabs across the top of the screen. For clarity, a full version of each stage name is used in the drop-down list where you change the status/stages of applicants.

You can use as many of the stages as are appropriate to fit your local requirements or your particular vacancy. Please see the Recruitment Guidance for information on planning your selection process ([http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning](http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning)).

1. From the main vacancy screen, click on the Manage Vacancy button next to the vacancy you wish to manage.

2. Select Process Applicants.

A list of applicants will be displayed.
Initially, all submitted applications which have been received but not yet assessed appear in the **Application Received** tab. There is also an **All** tab which lists everyone who has applied for the vacancy and their current stage (e.g. Received, Short-listing) and status (e.g. Active, Rejected). Applicants will always show on the **All** tab, as well as under the tab for the process stage that they are currently in.

The number of applicants at a given stage is shown next to the stage name.

3. **Click on the tab that reflects the selection stage you wish to view or process.** This will display the current applicants at that stage of the process.

   When you first begin managing applicants, you will be clicking on Received as all applicants will be listed there.

4. **Tick the box to the left of the applicant(s) you wish to process.**
5. At the bottom of your list of applicants, there is a drop-down menu with an **Apply** button next to it. Click on the drop-down menu arrow to open up the options.

You will see in the list that you can either:
- Change the selected applicants’ status (i.e. to indicate whether they are active in the stage of the process you are currently reviewing or if they have been rejected or withdrawn at that stage); OR
- Move the applicants to another stage in the process (e.g. if you are inviting them to a first round interview/selection event then you would move them to First Selection Stage).

6. Choose the status or stage you wish to allocate to your selected applicants from the drop-down list and then click on **Apply**.

7. The **Confirm Action** screen will be displayed.
If you have recorded a status of Rejected or Withdrawn for certain applicants, those applicants will now be greyed out and showing a status of Rejected or Withdrawn (as applicable).

If you applied a new stage for certain applicants using the drop-down menu, they will have moved from the stage they were in (e.g. Application Received) and their details will be moved to the new stage you selected (e.g. Short-listing or First Selection Stage).

You can use the Status drop-down to view Active Only, Rejected, Withdrawn or Offer statuses.

Applicants can be processed through all stages relevant to the vacancy’s selection process.

Note: If you are conducting long-listing to sift a large volume of applications down to a
manageable number, any of those rejected should be given a status of Rejected within the Application Received tab. Any applications not sifted out and which you will give a complete review in order to carry out short-listing should be moved to the stage Progressed to short-listing. If you have a small number of applications and intend to carry out short-listing on all of them, all applicants should be moved to the stage Progressed to short-listing. Guidance on long-listing and short-listing can be found at http://www.hr.admin.cam.ac.uk/recruitment/step-3-recruit-and-select.

You could use First Selection Stage for a preliminary round of interviews/selection tests and Second Selection Stage for a second round of interviews. You do not need to use all the stages.

You must move all candidates formally considered by an Appointments Committee or Board of Electors to the To be considered by Appointments Committee/Board of Electors stage. Only use this stage when an appointment needs to be approved by an Appointments Committee or Board of Electors formally constituted under the Statutes or Ordinances.

Note: It is important that you update the system with all applications received outside of the system (manual applications) and the outcomes for each stage of the selection process for all applicants because:

- Otherwise recruitment data generated for departments/institutions/HR will be incorrect. For example, equality data required for Athena SWAN applications, (to justify/assess positive action in the recruitment process, or reporting how successful our equality policies are) will not give an accurate reflection of where applicants reached in the recruitment process.

- Any HR11 Selection Results Grid that you download from the system to record the assessments made in the selection process will not be complete and accurate for the purposes of the Resident Labour Market Test (where the successful applicant requires a Tier 2 CoS).

- The graph identifying where each applicant saw the vacancy advertised will be of limited use (as will the future standard report on this).

- It enables you to ensure that all applications have been considered and progressed to the next stage or rejected, without the need for a separate manual tracking process.

- The University’s internal auditors for recruitment will expect to see a clear audit trail which shows that all applications received have been assessed and progressed or rejected. This was one of the concerns raised in the previous audit.

- It ensures that you are able to maximise the benefits of other features within the Web Recruitment System. For example:
  - Moving rejected applicants to ‘Rejected’ enables users to generate rejection emails/letters from within the System.
Moving the successful applicant to ‘Offer’ stage enables you to record offer details in the system instead of in the CHRIS Recruitment Module and removes the need for you to complete a CHRIS/10A form. It also means that you can generate an offer letter from the system and submit an electronic Appointment Request to the HR New Appointment Team.

- It is not possible to mark a vacancy as ‘Complete’ (i.e. that the selection process has ended) without recording the outcomes of the selection process (i.e. if applicants have not been rejected or made an offer). Please see section on Completing Recruitment for a Vacancy for details of why it is important to be able to complete a vacancy in the system.

6.4.2 Editing the details of an existing applicant

If an applicant contacts you during the recruitment process to inform you that his/her personal details have changed (e.g. name, contact details), you can edit these within the system.

1. Click on the drop-down list in the Actions column. Select Edit Applicant from the list.

An Edit Applicant Personal Details pop-up window will appear, as shown below.
2. Amend the details you need to change in the relevant field, then click on the Save Applicant button at the bottom of the window.

3. Click on Close at the bottom right-hand side of the window.

Please note: an entry describing the change that has been made, when it was made and your CRS-ID will be recorded automatically in the Notes for the applicant concerned.

6.4.3 Adding attachments to an existing applicant

You may wish to save documents relating to an applicant with their record in the Web Recruitment System so that all information about them within the recruitment process is found in one place. For example, you may wish to upload:

- HR8 Response to Enquiry ([http://www.hr.admin.cam.ac.uk/forms/hr8-response-enquiry-template](http://www.hr.admin.cam.ac.uk/forms/hr8-response-enquiry-template));
- HR10 Assessment Record ([http://www.hr.admin.cam.ac.uk/forms/hr10-assessment-record](http://www.hr.admin.cam.ac.uk/forms/hr10-assessment-record));
- HR13 Invite to Interview Letter ([http://www.hr.admin.cam.ac.uk/forms/hr13-invite-interview-letter-template](http://www.hr.admin.cam.ac.uk/forms/hr13-invite-interview-letter-template));
- HR17 Assessor Notes template ([http://www.hr.admin.cam.ac.uk/forms/hr17-assessor-notes-template](http://www.hr.admin.cam.ac.uk/forms/hr17-assessor-notes-template));
- HR4 Salary Case for Approval (http://www.hr.admin.cam.ac.uk/forms/hr4-starting-salary-case);
- HR23 Welcome Letter (http://www.hr.admin.cam.ac.uk/forms/hr23-welcome-letter-template).

💡 Tip: Store documents against an applicant if they relate to one applicant only. Store documents against a vacancy if they relate to the job, the recruitment process or multiple applicants.

**Please note:** under Data Protection Legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system (or elsewhere) contains only appropriate information which demonstrates that a fair, objective process took place.

1. To upload an attachment for an existing applicant, click on the drop-down list in the Actions column for the relevant applicant. Select **Admin Attachments**.

The following screen will then be displayed, including information about the types of file you can upload.
2. **Click on Choose.** Your file directory will then be displayed.

3. **Select a file to be uploaded from your file directory.** Double-click on it or click on **Open**.

4. You will be returned to the pop-up window. You will see the name of the file you have selected. Click on the **Upload** button as shown below, to upload the file (you can click on the **Cancel** button if you have chosen the wrong file).
The document will then be uploaded and displayed in the table of attachments as shown below.

Applicant admin attachments

You can upload documents which relate specifically to this applicant, such as a record of any interview notes or assessment scores. These documents will not be combined with the candidate’s application to form part of the application pack. Select the documents and press the upload button. The following file types are supported: *.pdf (preferred), *.doc, *.docx, *.ppt, *.pptx, *.txt, *.rtf.

Please note that for security and compatibility all documents are converted to PDF format.

If you have read-only access to this vacancy then you will be able to view attachments but not upload or delete them.

<table>
<thead>
<tr>
<th>Time</th>
<th>Filename</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-03-13T18:37:54.642</td>
<td>HR10 Assessment Record</td>
<td>Download File</td>
</tr>
</tbody>
</table>
Tip: To check the file content, click on the Download File button in the action field next to the relevant document in the table of attachments.

To delete the document click the drop down arrow next to the Download File button.

Select Delete File.

Click on Close at the bottom right-hand side of the pop-up window to return to the main applicants screen.

6.4.4 Adding notes to an applicant’s record

It is possible for you to add notes to an applicant’s record, which provide an auditable trail of the applicant’s progress through the process. Notes are automatically added by the system when you amend the stage an applicant has reached or an applicant’s status.

You may record information such as:

- Contact with the applicant, for example, if he/she contacts you to withdraw his/her application or to inform you that he/she cannot make the interview date/time offered.
- That a manual application you have added was screened and put forward by an agency that has been helping you to source candidates.
- Reasons for an action taken, for example, a summary of why the individual’s application has been rejected (although detailed reasons should be provided on a document such as the HR10 Assessment Record, particularly for stages after long-listing).

Please describe the source of the comments (for example, phone conversation with the applicant or notes from the interview panel).
Please note: under Data Protection Legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system or elsewhere) contains appropriate information which demonstrates that a fair, objective process took place.

1. Click on the Actions drop-down menu for your chosen applicant (next to Download Application).

2. Select Add/View Notes.

3. An Add Note to Application pop-up window will appear. Write your note in the New Note text box and click on Add Note.

4. Your note, the date and your CRS-ID will be displayed in the table underneath.
5. Click Close at the bottom right-hand side of the pop-up window. You will be returned to the main applicants screen for the vacancy.

6.5 Sending rejection correspondence and reference requests

Please see the Web Recruitment user guide on Generating Correspondence on the HR Systems web pages for details of how to generate and send rejection correspondence to applicants.

Please see the Web Recruitment user guide on Generating Correspondence on the HR Systems web pages for details of how to generate and send reference requests using the system.

6.6 The Offer Stage

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

The following Confirm Offer dialog box will then appear.
The confirmation window will indicate whether a Tier 2 CoS may be needed by the successful applicant based on his/her responses to right to work questions in their application form. However, you must double-check the successful applicant’s right to work status with him/her and establish if he/she needs a Tier 2 CoS.

Please ensure that you record the requirement for a CoS (or not) accurately for each of your vacancies in Web Recruitment.

It is very important that this information is recorded correctly because the University is required by law to keep certain documents and information from the recruitment process indefinitely where an individual requires a Tier 2 CoS. The Web Recruitment System will only retain records beyond the normal University retention period for completed vacancies where the successful applicant is recorded as requiring a CoS (or it is otherwise instructed to do so by a super-user).

As required, you can amend the default 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.

2. The applicant(s) will then be displayed in the Manage Offers screen, where you will be routed automatically after moving an applicant to Offer in progress.
Please see the Managing Offers user guide on the Web Recruitment system page, which describes the six step offer process in detail.

A quick reference guide to managing offers can also be found on the Web Recruitment system page.

As well as appearing within the six step offer process for the vacancy, the applicant will also appear on the Offers tab that lists all of the offers to which you have access across your vacancies:

The screen shows offers where the six step process has not been finished (i.e. an Appointment Request has not yet been made) by default.

You can view offers where an Appointment Request has been made by ticking the box at the top of the screen:

The 'Offer' progress bar show the status of the offer:
Click on Manage Offer to re-enter the Offer process for that applicant.

Note: each applicant at this stage is managed individually and you can no long perform tasks across multiple applicants.

If an applicant has been moved to offer incorrectly then go to the Vacancies tab, click on Process Applicants, click on the Offer tab, and select Change stage from the action list for the relevant applicant.

You will then see the following pop up window:

Select the stage from the drop down list:
Then click on the Change applicant stage button.

The applicant will be moved out of the Offers tab and will appear back in the stage you have selected.
5. Managing Offers

ADMIN users should record the offer details using the six step offer process.

You will be required to:

- Confirm the position you are appointing to;
- Record the details of the offer that you are making;
- Select whether to create a system-generated offer letter or to prepare the offer letter outside of Web Recruitment and upload it;
- Confirm details of how, when and by whom the offer letter was sent (for both manual and system generated letters);
- Record the offer outcome;
- Record additional details in order to submit an Appointment Request to the HR New Appointment Team within the system.

The Managing Offers Guide explains this process in detail.

The system will guide you through the stages in order to that the next stage becomes available at the appropriate point in the process.

Note: You should use the six step offer process wherever it is possible for you to do so. You will then no longer need to transfer the applicant to the CHRIS Recruitment Module, record details of the offer there or use the CHRIS10/10A form.
6. Completing Recruitment for a Vacancy

A vacancy should be marked as recruitment complete when:

- A recruitment process has been successful, all unsuccessful applicants have been rejected and all successful applicants have been transferred to CHRIS from the offers stage in Web Recruitment; OR
- The recruitment process was unsuccessful and no successful candidates were taken forward from one of the selection stages.

Marking a vacancy as complete will perform a number of actions within the system to benefit departments/institutions. A vacancy marked as complete will:

- Be purged of applicant identifiable data automatically 12 months after the closing date in accordance with the University’s recruitment document retention policy (unless a the successful applicant required a Tier 2 CoS or the standard purging schedule has been overridden with approval from HR);
- Have any successful candidate information saved as a PDF snapshot for future use;
- Not appear in a user’s list of vacancies (unless a user actively chooses for complete vacancies to be displayed), making the screen less cluttered.

Note: It is very important that you do mark a vacancy as complete within 12 months of the closing date for online applications. Otherwise, you may cause us to retain recruitment documentation for longer than is permitted.

8.1 Completing Recruitment for a Vacancy

1) In order to complete recruitment on a vacancy, select the vacancy and click on Manage Vacancy.
Note: Recruitment can only be completed for a vacancy when the vacancy closing date has passed (i.e. the Job Opportunities advert has closed).

2) The vacancy overview screen will be displayed:

![Vacancy Overview Screen](image)

3) Whenever it is appropriate to complete recruitment on a vacancy, a link will be displayed on the overview screen. Click on the **Complete recruitment for this vacancy** link.

The following message will be displayed:
Completion of activity in Web Recruitment

1 applicant has been requested to be appointed.
Please remember to send any outstanding appointment paperwork to the New Appointment team.

Do you want to complete recruitment for the vacancy KA00424: 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.

4) Tick the confirmation box then click on ‘Yes, complete recruitment’.

Note: If you have any outstanding actions on the vacancy, the system will display messages to indicate what these are (e.g. an applicant at offer stage where an Appointment Request has not yet been made or correspondence tasks awaiting confirmation). You will need to address these before completing recruitment.

8.2 Handling outstanding tasks awaiting confirmation

You will not be able to complete a vacancy with any form of task awaiting confirmation. Tasks can be of two types:

- Rejection task;
- Reference task.

The following sections describe the options for handling these two types of outstanding task.

Both types of tasks can be either cancelled or reverted back to manual (meaning that you will manage the correspondence outside of the system). The following sections provide an overview of the processes. Please see the guide to ‘Generating Correspondence’ within Web Recruitment for more details of how to deal with tasks awaiting confirmation.
Note: If you sent rejection correspondence or a reference request outside of the system, ideally you should revert the outstanding tasks to manual and record the method you used for the correspondence. This has the advantage of providing a clear and complete audit trail should any queries/issues arise in the future, or in the event of a recruitment internal audit.

8.2.1 Cancelling a correspondence task

Please note that, before you follow the instructions below, you should ensure that the vacancy configuration information is complete. Please see the guide to Generating Correspondence within the Web Recruitment document library on the HR Systems web pages for more details.

If you wish to cancel either type of correspondence task, you can do this from the Correspondence Awaiting Confirmation menu option on the left menu bar:

1. Tick the check box next to the task you wish to cancel and click on Cancel Selected Tasks.
2 You will be asked to confirm the cancellation.

**Confirm Cancellation**

Are you sure you want to cancel the selected tasks?

Note: For Rejection Tasks, the status of the associated candidates will remain as Rejected

**Yes**  **No**

3 When you refresh the screen, the task will have been removed.
Note: If you chose to cancel automated rejection or reference tasks, you should keep your own records of what you sent to the applicant/referree.

8.2.2 Switching a correspondence task back to manual

Please note that before you undertake this task you should ensure that the vacancy configuration information is complete. Please see the guide to Generating Correspondence within the Web Recruitment document library on the HR Systems web pages for more details.

If you wish to switch any type of automated correspondence task back to manual you can do this from the Correspondence Awaiting Confirmation menu option on the left menu bar.

1. Tick the check box next to the relevant task and click on Set to Manual using the option on the Action menu.

2. You will be asked to confirm the action:
When you refresh the screen, the task will then be shown under the Manual tab so that you can record the manual correspondence that you have sent/decided to send.

Once you have reverted a task to manual, you are strongly advised to record details of:

- Any manual rejection letters/emails sent to the applicant;
- The manual reference request sent to the referee; and
- The manually returned reference from the referee.

Please see the guide to Generating Correspondence within the Web Recruitment document library on the HR Systems web pages for more details.
7. **Purging of Applicant Identifiable Data**

The Web Recruitment System aims to make it as easy as possible for departments/institutions to comply with the University’s existing retention policy for recruitment documentation, whilst maintaining some flexibility and the ability to generate recruitment management information in the long-term.

Once you have marked a vacancy as complete, it will normally be subject to automatic purging by the system 12 months after the vacancy’s closing date for online applications. This means that data which makes it possible to identify individual unsuccessful applicants will be removed but anonymised details (including equal opportunities information) will be retained so that it is still possible to generate reports and undertake trend analysis (for example, for Athena SWAN or equal opportunities monitoring purposes). Details of the successful applicant, including their application, will be retained.

The exception to this purging schedule is where the successful applicant for a vacancy requires a Tier 2 CoS. In these circumstances, immigration rules require us to retain recruitment documentation for 12 months or until a UKVI compliance officer has examined and approved them, whichever is the longer period. The system will recognise vacancies where a CoS request has been made. It will ensure that they are not purged 12 months after the closing date but retained until UKVI compliance officer has audited them.

You will be reminded in advance when a vacancy is approaching 12 months after its closing date and is eligible for purging. This will be done through on-screen messages.

If at this point, or any earlier in the recruitment process, you are aware of a legitimate and compelling reason (e.g. ongoing legal proceedings) why the vacancy should not be subject to the normal purging rules, you must speak with the relevant HR Business Manager or the Head of Recruitment. Having considered the data protection implications of your request, he/she will be able to authorise an exception being made and you will then be able to ask the CHRIS Helpdesk to mark the vacancy as a purging exception.
8. Exceptions to the ‘Standard’ Process

10.1 Studentships

Please note that studentships should not be made available to receive applications using the Web Recruitment System. Studentships are not employment contracts and using a system designed for recruiting employees may cause confusion on this matter.

10.2 Applicants sourced through agencies

Where you have decided to use a recruitment agency to source applicants, this should be handled as follows:

• Where you are using an agency, as well as advertising the vacancy on the University’s Job Opportunities pages and accepting direct applications – any applicants forwarded to the appointing body for consideration should have their details entered into the Web Recruitment System using the manual application entry process described in the section on adding an applicant to a vacancy. Applications sifted out by the agency, which the University does not see/review, do not need to be recorded in the system.

• Where you are using an agency as the only means of sourcing your applicants and are not accepting direct applications through the Web Recruitment System, it will not be possible to record details of the applications forwarded by the agency in the system. Instead, applicants forwarded to you should be asked (by the agency) to complete a CHRIS/5 or CHRIS/6 form (as applicable). These should be handled as described in the Recruitment Guidance at: [http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-method](http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-method).

• In order that the University’s equal opportunities data is complete, please provide details of the applicants’ equal opportunities information as described in the information found at: [http://www.hr.admin.cam.ac.uk/recruitment/step-3-recruit-and-select/close-selection-process](http://www.hr.admin.cam.ac.uk/recruitment/step-3-recruit-and-select/close-selection-process).