Web Recruitment Release 4, January 2015
Tier 2 Certificate of Sponsorship – Requesting Applicant Details

HR Systems
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1. Web Recruitment – Introduction to Release 4

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 then 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 – Tier 2 CoS - Requesting Applicant Details

- 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 and process 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.

The Compliance Team should be contacted for advice about Tier 2 Certificate of Sponsorship applications and other immigration matters via complianceteam@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, 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 provided by the step-by-step instructions in the user 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. Requesting a Tier 2 Certificate of Sponsorship (CoS)

3.1. Actions required before reaching the CoS details section of the process

When an applicant is selected and moved to **Offer in progress**, the following offer confirmation window appears:

The confirmation window will indicate whether a CoS may be needed by the successful applicant based on his/her responses to the right to work questions in his/her job 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. As required, you can amend the default by selecting from the drop-down list.

Please ensure that you record the requirement for a Tier 2 CoS 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 it is instructed to do so; in this case, that means ensuring that the successful applicant is recorded as requiring a CoS.

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 that you will have the opportunity to change your response to the “CoS required?” question later in the Offer process if circumstances change.
The applicant will then appear in the **Offers** tab.

The CoS process is Step 5 in the six-step offer process.

Full details of the process for Steps 1 to 4 are included in the Managing Offers Guide on the [HR Systems pages](#).

This guide focuses on Step 5 of the process, once a conditional offer has been already been accepted. Once this outcome has been recorded in Step 4, you will be routed automatically to Step 5.
Web Recruitment – Tier 2 CoS - Requesting Applicant Details

Your first task within this section is to confirm whether a Tier 2 CoS is required for your successful applicant to obtain right to work in the UK, having confirmed this with your successful applicant.

You also need to decide whether you will:

- Use the system to request that the applicant logs back into their Web Recruitment account to provide further details and supporting documents required for their Tier 2 CoS Application; OR
- Contact the applicant outside of the system to request the required documents.

Detailed guidance on Tier 2 of the points-based immigration system (including the Tier 2 CoS application process and required documents) can be found on the HR Division’s Immigration web pages.

1 Confirm whether the applicant requires a Tier 2 CoS and whether or not you will be using the system to obtain CoS details/documents from them by selecting the appropriate value from the drop down list.

2 Click on the Confirm button.

The rest of this user guide focuses on how the rest of the process works when you have selected and confirmed either of the ‘Yes…’ options from the drop-down menu shown above.

- If you selected **Yes – and I will use the system to request applicant CoS information**, follow the instructions provided in section 3.2 below and onwards.
- If you selected **Yes – but I will contact the applicant outside the system for CoS information**, follow the instructions in section 3.5.2.
3.2 Inviting an applicant to complete their CoS details in Web Recruitment

3.2.1 Steps to be taken by you

Where you have clicked on **Yes** – and **I will use the system to request applicant CoS information** (as described in section 3.1), you will be routed automatically to the second tab within Step 5 – **CoS request**.

Here you will be recording contact details to be provided to the successful applicant when they are emailed by the system and asked to log-in to enter details required for their CoS application. He/she can then use these contact details in the event that there are any documents which they are not willing or able to upload.

Review/update or enter the contact details that you wish to be provided to the successful applicant.

If you created a system-generated offer letter for this applicant, the contact details used for the offer letter will be displayed by default. These can be amended as required.

Click on the request information button.
A confirmation message will then be displayed to check that you wish to proceed with requesting CoS details from the successful applicant.

**Send Request for CoS Information**

You are about to request that the applicant: Brownley, Margaret logs back into the recruitment system to provide the additional details required for a Tier 2 Certificate of Sponsorship request.

Applicants will have the option to supply supporting documents through the post.

Request that applicant provides proof of their qualifications:

- [ ] Yes
- [ ] No

Before clicking on Request Information, decide whether you want the applicant to be asked to provide proof of any qualifications/professional registrations and update the drop-down after ‘Request that applicant provides proof of their qualifications?’ as required.

Request that applicant provides proof of their qualifications:

- [ ] Yes
- [ ] No

You must choose “Yes” where a qualification / professional registration was specified in the job advert as required (rather than desirable) for the post.

Click on the Request Information button.
Web Recruitment – Tier 2 CoS - Requesting Applicant Details

The applicant is then sent an email inviting them back to their Web Recruitment account to provide details and documents required for their Tier 2 CoS application.

The CoS Status in Step 5 will be updated to reflect that data has been requested.

3.2.2 What the applicant sees

When you make a request for the applicant to provide you with CoS details, the following standard email is sent to his/her registered email address:
When the applicant clicks on the link provided in the email they are directed to the Applicant log-in screen where they will need to enter their email address and password.

When the applicant logs into the system, the first screen they see explains at the top that they need to provide additional information to us.
The applicant can then click on **Supply Information** and a form is displayed with three tabs.

Here, they will provide/update personal and visa details, and upload any required supporting documents which are needed for the Tier 2 CoS application.

This form has the same look and feel as the main application form and the applicant can save and return, mark sections as complete and then check the details in a PDF before they submit.
A link to UKVI’s points calculator is supplied so that the applicant can check/enter their points score.
The Supporting Document Upload screen provides details of documents that the applicant may need to provide and, for each one, requires them to upload a copy or indicate that they have posted it to you, or that it is not applicable to him/her.

Once all sections are answered the applicant must complete the declaration (e.g. to confirm that the information is correct and complete) before submitting.

An applicant can also click on Review information to check his/her details and any uploaded documents before submitting them:

A PDF version of the information provided will then be displayed to the applicant for checking.
Once the applicant is satisfied that the information is correct, they can then submit the CoS details by clicking on the **Submit Information** button.

The applicant is then asked to confirm before continuing and a message is displayed to show that the information has been received.
3.4. Viewing the applicant’s completed CoS information

1. Once an applicant has submitted his/her CoS details and any supporting documents within the system, the status of the CoS Request will be updated in Offer step 5 to Data Received.

![CoS Request status](image)

💡 You will need to log in and check Step 5 of the offer when you are waiting for CoS information so that you know when it has been received.

2. When you see a status of Data Received, click on the CoS documents tab (the third tab in Step 5). The CoS information and documents provided by the applicant are visible there.

![CoS documents](image)
The on-screen table indicates which CoS supporting documents have been uploaded into the system by the applicant, which (if any) he/she has posted to you and which are not applicable to him/her.

3. Click on **Download CoS Information** button.

4. Click on **Open**.

A PDF of the information that the applicant has provided for his/her Tier 2 CoS application will then be displayed. This will include any documents that he/she has uploaded into the system.
3.5. Providing supporting documents required for a Tier 2 CoS application

3.5.1 Uploading documents posted by the applicant (where other CoS details were supplied via Web Recruitment)

Please follow the instructions below where you have used the system to gather CoS information from an applicant and they have posted one or more supporting documents to you.

1. If you are not already there, please navigate to the CoS documents tab in Step 5 CoS details for the relevant applicant (this will be the second or third tab, depending on whether you have used the system to request CoS information).

2. Review the on-screen table with a heading of Documents provided by applicant.

<table>
<thead>
<tr>
<th>Document provided by applicant</th>
<th>N/A</th>
<th>Posted to department</th>
<th>File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy of passport</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy of visa</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evidence of qualifications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Translation of qualifications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evidence of name change</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Where there is a tick in the column Posted to department (see Evidence of qualifications in the screen shot above as an example), you will need to scan and upload a copy of the document concerned once you have received it in the post from the applicant.

3. Click on the Upload file posted by applicant button.

4. Click on the Choose button in the pop-up window.
Upload Supporting Document

Please use the button below to select and upload a supporting document.

- The following preferred file types are supported: .doc, .docx, .ppt, .pptx, .rtf, .txt. If you cannot upload a file in any of these formats, you may also upload a .pdf file;
- The Applicant Guidance has information on converting other file types;
- Each file must not exceed 4MB in size;
- Please note all uploaded files are converted to PDF documents.

The upload and conversion process can sometimes take a few minutes. Please do not move away from this page, this window will close once the upload is complete.

5. Select the relevant file from your file directory.

6. Double-click on the file or click on the **Open** button.

A PDF icon and the file's name will be listed in the **File** column in the relevant row of the documents table (see Evidence of qualifications in the screen shot below as an example).
7. Repeat the process above for any other documents posted to you by the applicant outside of the system.

3.5.2 Providing CoS supporting documents to HR (whether or not you have requested CoS details using the system)

You will need to follow the instructions below whether or not you have used the system to request details from the applicant for their CoS application.

In either case, you will need to ensure that you have uploaded (or indicated that you will post to the HR New Appointment team) all of the required/applicable supporting documents for the Tier 2 CoS including:

- The Tier 2 CoS Application Form;
- Supporting documents from the applicant (e.g. copy of passport, copy of qualifications where you did not request these using the system);
- Supporting documents from the department/institution in relation to the recruitment process (e.g. screenshots of adverts, selection criteria and interview notes).

1. If you are not already there, please navigate to the CoS documents tab in Step 5 CoS details for the relevant applicant (this will be the second or third tab, depending on whether you have used the system to request CoS information).

2. Scroll down to Additional documents that may be required and click on the drop-down list.
3. Select one of the types of supporting documents.

4. Choose to either upload the document or confirm that you will be posting it to the New Appointment Team.

   a) **Upload the document**

       Click on the radio button next to this option.

       ![Upload a document](image)

       Click on the **Choose** button and select the document to be uploaded from your file directory.
Select the file and double-click or click on Open.

The document type will then be listed in the table, with a PDF icon and the document name’s in the File column of the table (showing that it has been uploaded successfully).

<table>
<thead>
<tr>
<th>Document to be provided by department</th>
<th>N/A</th>
<th>Posted to New Appointment Team</th>
<th>File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 2 CoS application form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screenshots/screen prints of all advertisements placed</td>
<td></td>
<td></td>
<td>M:\Attachment check list.docx</td>
</tr>
<tr>
<td>HR/F Further Information document, CHRIS/FD33 or role description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection criteria for the job</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview notes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

b) **Confirm that you are going to post the document to the New Appointment Team**

Click on the radio button next to this option.
Click on the **Add** button.

The document type will be listed in the table and will have a tick in the Posted to New Appointment Team column.

5. Repeat the process above until all required supporting documents have been uploaded or you have confirmed that you are posting them.

   ➡️ **Please note:** if you did **not** request CoS details from the applicant using Web Recruitment, there will be additional documents listed in the table below the drop-down list. These are documents that you should have obtained from the applicant (as applicable). You will need to upload those that are required or confirm that you are posting them.
The table below lists all possible supporting documents for a Tier 2 CoS application and when they are required.

Please note: the CVs/application forms of those who reached final interview do not need to be provided as these will all be held within the Web Recruitment System already (so long as you have added/uploaded the details of any applications received outside of the system; please see the Managing vacancies and applicants user guide on the [HR Systems web pages](#) for details of how to do this).

<table>
<thead>
<tr>
<th>Document type</th>
<th>When document is needed for a Tier 2 CoS Application</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department/institution documents</strong></td>
<td></td>
</tr>
<tr>
<td>Tier 2 CoS Application Form</td>
<td>Always required</td>
</tr>
<tr>
<td>HR7 Further Information/PD33/role description</td>
<td>Always required</td>
</tr>
<tr>
<td>Interview notes (which document selection decisions and reasons)</td>
<td>Required if the Resident Labour Market test must be met (see Immigration web pages for further information)</td>
</tr>
<tr>
<td>Selection criteria</td>
<td>Required if the Resident Labour Market test must be met (see Immigration web pages for further information)</td>
</tr>
<tr>
<td>Screenshots of adverts as evidence of Resident Labour Market Test</td>
<td>Required if the Resident Labour Market test must be met (see Immigration web pages for further information)</td>
</tr>
<tr>
<td>Copy of contract with recruitment agency</td>
<td>Where a recruitment agency was used as part of the process</td>
</tr>
<tr>
<td>Copy of invoice from recruitment agency</td>
<td>Where a recruitment agency was used as part of the process</td>
</tr>
<tr>
<td><strong>Applicant documents</strong></td>
<td></td>
</tr>
<tr>
<td>Copy of applicant's passport</td>
<td>Always required</td>
</tr>
<tr>
<td>Copy of applicant's qualifications (where specified as required for the position)</td>
<td>Required where a particular qualification or professional registration was stated as a requirement in the advert/selection criteria</td>
</tr>
<tr>
<td>Translation of the applicant’s qualification certificate</td>
<td>Required where the applicant’s qualification/professional registration certificate is not in English</td>
</tr>
<tr>
<td>Copy of applicant’s UK visa</td>
<td>Required where applicant has a current UK visa</td>
</tr>
<tr>
<td>Evidence of name change</td>
<td>Required where any of the applicant’s supporting documents are in a different name (e.g. because the name in the applicant’s qualification certificate is a maiden name).</td>
</tr>
</tbody>
</table>
6. Once all required CoS supporting documents from the applicant and from the department/institution have been uploaded into the system, or it has been confirmed that they will be posted to the New Appointment Team, tick the box to confirm that the details are now complete and then click on Save or Save and Next.

7. You will need to remember to post any documents to the New Appointment Team after you have completed Step 6 of the Offer process in Web Recruitment. Please see the Managing offers user guide on the HR Systems web pages for details of how to download a cover sheet to send with any supporting documents.

3.6. CANCELLING A COS REQUEST

If you have indicated in error that an applicant needs a CoS, or circumstances have changed, you can cancel pending requests for CoS information from applicants.

Please note that it is very important that you cancel a request where a CoS is not required so that the correct recruitment documentation retention policy rules are applied by the system.

1) Within Offer step 5, click on the Cos Request tab.

2) Click on the Cancel Request button.
3) Confirm the cancellation by clicking on **Yes – cancel this request**.

This cancels the task and you will then be taken back to the CoS details screen so that you can confirm that a Tier 2 CoS is not required or state that you will now handle the collection of the CoS details outside of the system:
Please note that while you can still cancel a request once an invitation has already been sent to the applicant it is advisable to speak with the applicant before doing this. Cancelling will remove the applicant’s ability to supply addition CoS information in their online account and this may cause confusion if they have already started the process.

Please also note that once the applicant has submitted their data, the CoS status is updated to ‘Data Received’; it is no longer possible to cancel a CoS request once this has occurred.