Web Recruitment Release 4, January 2015
Generating correspondence

HR Systems
1. Web Recruitment – Introduction

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

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

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

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

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

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

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

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

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

The first release of the Web Recruitment System focused on:

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

The second release of the Web Recruitment System focused on:

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

The third release of the Web Recruitment System focused on:

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

1.2 Release 4 overview

Release 4 focuses on:

• Removing the need for vacancy administrators in departments/institutions to use the CHRIS Recruitment Module and CHRIS/10A form for the majority of appointments and replacing these with the following actions doing the following within Web Recruitment:
  o Recording details about the offer and appointment within a new Offers section;
  o Uploading supporting documents for an appointment (and Tier 2 Certificate of Sponsorship application, if required); and
  o 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 guide provides details of how to generate two forms of correspondence to applicants:

- Rejection emails and letters; and
- Reference requests.

It also includes details of how to record correspondence made outside of the Web Recruitment system. 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>
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<tr>
<td>Generating Correspondence</td>
<td>User guide</td>
<td>This guide explains how to generate rejection emails/letters and reference requests 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>
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</tr>
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<td>User guide</td>
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</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>
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3. Generating Electronic Rejection Emails and Letters

There are four steps to this process:

Step 1 – reject the unsuccessful applicants
Step 2 – set up the contact details for the vacancy
Step 3 – optionally customise the rejection email
Step 4 – confirm the rejection correspondence

Note that the rejection will not be sent unless you have confirmed it under Correspondence awaiting confirmation.

The following steps describe the process.

Step 1 – Reject the unsuccessful applicants

1. Log in to the HR Admin Panel. The Vacancies Tab will display all the vacancies that you have access to.

2. Locate the vacancy for which you wish to send rejection correspondence. Click on the Manage Vacancy button.
The Vacancy Overview screen will be displayed.

AH04339: Programming Officer[Non-Clinical-Research]

Vacancy overview

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relevant to this vacancy
- Maintain vacancy notes and attachments

Application & referee report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

Positions available for this vacancy

This following positions can be appointed for this vacancy: if there are no positions listed, and it has been at least 24 hours since you set up this vacancy on RMS, please contact the CHRIS Helpdesk.

Offer in progress? | Earliest start date
--- | ---

Application Stages Overview

[Diagram of application stages]
3. Click on **Process applicants**.

4. Select the applicants you wish to reject and select the **Rejected** status from the drop down list.
5. Click **Apply**.
Step 2 – Set-up the contact details for the vacancy

Next select **Vacancy Configuration**.

Enter the contact information for **All correspondence** for the vacancy. If you are an Administrator sending letters on behalf of a colleague then you may enter another person’s details into these fields.
Once the contact information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.

Note that where you have previously entered contact information and have already generated correspondence which is awaiting confirmation, a confirmation message will be displayed to remind you that the amended contact information and that what you have entered will be applied to the existing tasks. You will need to click on **Yes** to confirm that you are aware of that and wish to proceed.
Confirm configuration

6 awaiting confirmation tasks exist on this vacancy.

- Configuration changes you have made will be applied to all awaiting confirmation tasks that exist on this vacancy.

- If you do not want the configuration changes to be applied, please click the No button and navigate to the Awaiting Confirmation Page to confirm all the awaiting confirmation tasks before you continue.

Do you wish to save the configuration and apply the changes to the pending tasks?

- Yes, apply changes
- No, don't apply changes

A confirmation message will be displayed.
Step 3 – Optionally customise the rejection email

Next, select **Manage Rejection Correspondence**. The applicants that have been rejected will be displayed.

If you wish to tailor an individual rejection email, select the **Customise** option from the drop-down menu next to the Re-Activate button.

The **Customise Rejection Email** window will open to allow you to add an extra paragraph (which will become the second paragraph in the email) as required.

Type your text and click on the **Save** button.

If you do not need to tailor the email then the system will use the default correspondence template, including the data entered when you configured the correspondence for the vacancy where required.
This text will then be inserted into the rejection email/pdf as shown:

Dear Mr Butler,

Re: LF03003 : Personal Assistant to Departmental Secretary

Thank you for your recent application for the above post. I am sorry to tell you that we will not be taking your application any further on this occasion.

Thanks for applying Owen. Unfortunately your experience was not quite what was needed on this occasion. We’d welcome the opportunity to work with you again and so would encourage you to keep applying for research vacancies related to this field.

I would like to thank you for the time and effort you have spent applying for this vacancy and wish you well in your future career.

Yours sincerely,

Click on the Preview option to view a copy of the email.
The **Correspondence Preview** window will be displayed.

![Correspondence Preview](image)

Please note that the wording of the rejection email/letter will also include the following sentence if you have rejected the individual at Selection Stage 1 or later:

*If you would like to discuss this further or receive feedback, please contact Name on telephone number or via email address.*

This is in accordance with the [Recruitment Guidance](#) which states that, due to high volumes of applications, it is University practice not to provide feedback to those rejected before being invited to an interview.

If you need to send a rejection letter outside the system (for example because an applicant has made a manual application and does not have an email address) select the **Download Letter** option from the drop down menu.
Select to **Open** the file in the pop-up window.

A PDF will open that you can print and post as appropriate.
Step 4 – Confirm the rejection

When you have completed any customisation of letters, navigate to the Correspondence option in the toolbar on the left-hand side of the screen and select *Awaiting Confirmation*.

Your rejection tasks will be displayed and you can preview the final copy of the emails using the **Preview** button in the Action column.

When you are satisfied with the correspondence generated, select the applicants and click the **Confirm Selected Tasks** button.
Click the Yes button in the confirmation message to proceed with sending rejection emails to the selected applicants.
5. Using manual rejections outside of Web Recruitment

The Web Recruitment system automatically generates a rejection task when an applicant has been set to a status of ‘rejected’ at any stage of the selection process.

In the unlikely event that you need to cancel these tasks and send rejection details manually you should:

Step 1 – Reject the unsuccessful applicants

Step 2 - Complete the vacancy configuration information

Step 3 – Cancel the rejection tasks

Step 4 – Record details of how the rejections were handled.

These four steps are described in more detail below:

Step 1 – Reject the unsuccessful applicants

1. Log in to the HR Admin Panel. The Vacancies Tab will display all the vacancies that you have access to.
2 Locate the vacancy for which you wish to send rejection correspondence. Click on the Manage Vacancy button.

3 The Vacancy Overview screen will be displayed:
4 Click on **Process applicants**.

5 Select the applicants you wish to reject and set the **Rejected** status from the drop down list.
Click **Apply**.
Step 2 – Complete the vacancy configuration information

Select Vacancy Configuration:

Enter the contact information for **All correspondence** for the vacancy. If you are an Administrator sending letters on behalf of a colleague then you may enter another person’s details into these fields.
Once the contact information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.

Note that where you have previously entered contact information and have already generated correspondence which is awaiting confirmation, a confirmation message will be displayed to remind you that the amended contact information and that what you have entered will be applied to the existing tasks. You will need to click on **Yes** to confirm that you are aware of that and wish to proceed.
Confirm configuration

6 awaiting confirmation tasks exist on this vacancy.

- Configuration changes you have made will be applied to all awaiting confirmation tasks that exist on this vacancy.

- If you do not want the configuration changes to be applied, please click the No button and navigate to the Awaiting Confirmation Page to confirm all the awaiting confirmation tasks before you continue.

Do you wish to save the configuration and apply the changes to the pending tasks?

[Yes, apply changes] [No, don't apply changes]

A confirmation message will be displayed.

<table>
<thead>
<tr>
<th>Contact Information</th>
<th>Reference Correspondence</th>
</tr>
</thead>
</table>

Information Saved
The contact information has been saved
Step 3 – Cancel the rejection tasks

From the Correspondence Awaiting Confirmation menu option on the left menu bar:

Tick the task you wish to cancel and click on Cancel Selected Tasks.

You will be asked to confirm the cancellation.
Web Recruitment – Generating Correspondence

When you refresh the screen the task will have been removed:
Step 4 – Record details of how the rejections were handled.

In order that you do not need to keep separate records outside of the system, it is recommended that you input details of the manual rejections sent (i.e. outside of the system) by using the **Recording correspondence** function within Web Recruitment.

From the vacancy tab:

![Vacancy tab screenshot](image)

Locate the vacancy for which you wish to record details of the manual rejection correspondence. Click on the **Manage Vacancy** button.

![Manage Vacancy button screenshot](image)

Select View or Record Correspondence from the Correspondence section on the left of the screen:
Select **Record Correspondence**.

The table below details all of the correspondence sent for this vacancy and details the following information:

- **Type**: The reason for the correspondence, for example a reference request
- **Format**: The format of the correspondence, for example email or phone call
- **System Managed**: Was the correspondence automatically generated by the system

You will also be able to record a record of any correspondence that took place outside of the system using the 'Record Correspondence' button.

<table>
<thead>
<tr>
<th>Date Sent</th>
<th>All Applicants</th>
<th>Format</th>
<th>System Managed</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20-Mar-2014</td>
<td>Butcher, Jeremy</td>
<td>Reference</td>
<td>Yes</td>
<td>View</td>
</tr>
<tr>
<td>20-Mar-2014</td>
<td>Collins, Gemma</td>
<td>Reference</td>
<td>Yes</td>
<td>View</td>
</tr>
</tbody>
</table>
The Record Correspondence window will be displayed.

Select the relevant applicant from the drop down list. Select the Contact Type and Contact Format; enter the Date, Summary/Subject and Details. Once complete, click on the Record Correspondence button.

The entry will appear in the table.
4. Using Electronic References within Web Recruitment

4.1 Generating electronic reference requests

Reference requests can be sent electronically at the required point in the process to referees for whom applicants have:

- Supplied an email address; and
- Indicated in their application form that they can be contacted at that time (applicants currently have the option to tell us that referees can be contacted during the selection process, or once they have been made an offer of employment).

Further details about when to request references, when they may be used in the selection process, how to evaluate them and data protection implications of references can be found in the Request references section of the Recruitment Guidance.

Within the Web recruitment system the process consists of three steps:

Step 1 – Set-up the contact and reference information for the vacancy

Step 2 – Identify the applicant(s) and request the reference

Step 3 – Confirm the reference request

Step 1 – Set-up the contact and reference information for the vacancy

1. Log in to the HR Admin Panel. The Vacancies Tab will display all the vacancies that you have access to.
2. Locate the vacancy for which you wish to send out reference requests. Click on the Manage Vacancy button.

The Vacancy Overview screen will be displayed:
3. Select **Vacancy Configuration**.

4. If you have not done so already, enter the contact information for the vacancy. If you are an administrator sending letters on behalf of a colleague then you may enter another person’s details into these fields.
Please note that if you update the contact information at any point, all correspondence that you have already generated, and which is awaiting confirmation, will be updated with the amended details. If you do not wish this to happen, you can confirm awaiting confirmation tasks before making a change to the contact information.

5. Once the Contact Information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.
6. Select the second tab in this window, **Reference Correspondence**

Select the reference request template that you wish to use.

- **Academic Template**

Three templates have been developed:

- An academic template to assess an individual’s academic standing and potential, paying particular attention to his/her performance in teaching and research.

- A non-academic template for a general assessment of the individual’s suitability for the role.

- A non-academic form that is similar to the old PD15 form (i.e. a structured template for the referee’s assessment, which asks specific questions about generic skills, whether they would re-employ the individual etc.).

7. Enter the preferred date by which you would like referees to have responded to your request.
8. If required, use the **Additional Paragraph** field to enter an additional paragraph of text that you would like included in the letter for all reference requests for the vacancy.

The additional paragraph will appear in the position shown in the example below:
Dear Dr Smith,

Reference Request for Mrs Denise Cooper

Mrs Denise Cooper has applied to the University for the position of Personal Assistant to Departmental Secretary and has given your name as someone whom we can approach for a reference.

I should be very grateful for your assessment of the suitability of the candidate for this appointment. I have enclosed details of the position to assist you.

Please advise on suitability based upon further particulars

It would be particularly helpful if you were able to provide your reference by 31 July 2014 and if you would confirm how the candidate is known to you. If they are known to you as an employee, it would be appreciated if you would also provide a brief outline of the position they held, and the dates of their employment and details of any disciplinary record within the last 12 months of employment.

Please be aware that under the Data Protection Act 1998, applicants would normally have access to the information provided by their referees if they request it from us. This is because an organisation providing a reference is exempt under the Data Protection Act but the organisation receiving the reference is not. If there are strong reasons for protecting the confidentiality of your reference, please state them within your reply. For your information, the law relating to data protection and references is explained at www.ico.gov.uk.

Thank you in advance for your assistance in this matter.

Yours sincerely,

9. Once you have finished configuring contact information, click on the check box to **Mark Reference Correspondence as complete** and click the **Save Configuration** button.

**Note:** You also have the option on this screen to decide whether the returned references ought to be included in the application pack for members of the Appointing Body to review. The default is **not** to include them. Please see the **Request references** section of the Recruitment Guidance for information on when and when not to use references as part of the selection process.
Step 2 – Identify the applicant(s) and request the reference

Select **Manage Reference Request** from the Tasks section of the navigation menu.
Web Recruitment – Generating Correspondence

Select the stage of the process that you are currently working in from the drop down box.

The applicants at this stage and their referees will be displayed. Where the applicant has indicated on the application form that they do not wish the referee to be contacted before they have been made an offer, the referee will be displayed in grey and shown as not contactable until the applicant is recorded in the system as having accepted an offer.
Select the applicants for whom you wish to send a reference request and click on **Request References**.

A confirmation message will be displayed and **Awaiting Confirmation** will be displayed in the status column for the referees that have been selected. See Step 3 below for instructions on what to do next to confirm that the reference request emails should be sent.

Note that if you need to send a reference request outside the system (for example because a referee has been supplied without an email address) click on the drop-down menu next to the Upload button and Click **Download Letter**. This will open a PDF that you can print and post.
Select **Open** in the pop-up window.

A PDF will open that you can post as appropriate.
Step 3 – Confirm the reference request

For reference request emails, you now need to navigate to Correspondence in the toolbar at the left-hand side of the screen and select Awaiting Confirmation.

Use the Filter to sort Reference Tasks from Rejection Tasks

Select Preview button in the Action column to view a copy of a reference request.
A preview will be displayed:

When you are satisfied with the correspondence generated, select the applicants for whom you wish to email reference requests and click the Confirm Selected Tasks button.
Confirm the correspondence by clicking on the **Yes** button in the pop-up window.

A tasks being processed message will be displayed. A reference request will be emailed to each referee.

Note that you can also cancel the reference request in this screen:
Tick the task you wish to cancel and click on **Cancel Selected Tasks**. You will be asked to confirm:

When you refresh the screen the task will have been removed:

Note that you can also switch a reference back to manual on this screen by using the actions menu:
Web Recruitment – Generating Correspondence

You will be asked to confirm the action:

Confirm Action
Are you sure you want to set this task to Manual?
Yes  No

When you refresh the screen the task will be shown under the Manual tab so that you can record the manual correspondence that you have sent or have decided to send.
4.2 Overview of the Electronic Process for Referees

Referees are emailed and provided with a link and a PIN to upload their reference into the Web Recruitment System.

The wording of the email is tailored depending on whether you have added any customised content and the reference template you have selected. For example, the Academic template contains the following paragraph:

```
I should be very grateful for your evaluation of the suitability of the candidate for this appointment and your assessment of their academic standing and potential, paying particular attention to their performance in teaching and research. To upload your reference, and to see more information about the vacancy in question please visit the link below and authenticate using the PIN: 62311
```


The non-academic template contains this paragraph:

```
I should be very grateful for your assessment of the suitability of the candidate for this appointment. To upload your reference, and to see more information about the vacancy in question please visit the link below and authenticate using the PIN: 75310
```


(Non Academic Template Example)

It would be particularly helpful if you were able to provide your reference by 28 March 2014 and if you would confirm how the candidate is known to you. If they are known to you as an employee, it would be appreciated if you would also provide a brief outline of the position they held, and the dates of their employment and details of any disciplinary record within the last 12 months of employment.

The non-academic with form contains a link to be able to download the form:

```
I should be very grateful if you would complete the reference form available for you to download here. Once completed, please upload the form using the link below and authenticate using the PIN: 68122. It would be particularly helpful if you would upload your reference form by 28 March 2014.
```

When the referee clicks on the link they will be required to enter the PIN and log in.

By clicking on this link, they will also be able to view the Job Opportunities advert for the vacancy an individual is applying for, as well as any HR7 Further Information document published with the advert.
The referee will supply their organisation name and their role in the organisation and can then view the role details (advert and further information) and attach their reference.

Where the non-academic with form has been selected as the reference template, then the referee will complete a reference form as below:
Once the reference has been submitted a confirmation will be displayed:

![Reference Submitted]

### Note:
If you have requested a reference and then reject the applicant before the reference is completed, the referee will be unable to complete reference details, even though they have received a request. It is, therefore, strongly recommended that you contact affected referees should this situation arise.
4.3 Viewing Returned References

1. Once the reference has been received in the system, you will see this by selecting **Manage Reference Requests** under Tasks.

   ![Manage Reference Requests](image)

   The status of all requests will be displayed in the table.

   ![Request References Table](image)

   When a reference has been submitted, the status will display Complete and a PDF file will be shown in the File column. You can then download a copy of the reference.

   ![Download Reference](image)
6. Requesting references manually

Reference requests do not have to be sent electronically using the Web Recruitment System.

If you do choose to collect these outside of the system then, in order to allow a complete audit trail and to avoid the need for you to keep manual records outside of the system, Web Recruitment will allow you record details of any manual reference requests and will also allow you to upload returned references. You are strongly encouraged to use this facility.

Further details about when to request references, when they may be used in the selection process, how to evaluate them and data protection implications of references can be found in the Requesting references section of the Recruitment Guidance.

Within the Web recruitment system the process consists of the following five steps:

Step 1 – Set up the contact and reference information for the vacancy
Step 2 – Identify the applicant(s) and initiate a reference record
Step 3 – Switch the correspondence task to manual
Step 4 - Record details of the correspondence sent to the applicant
Step 5 – Upload the returned reference

The sections below explain each step in detail.
Step 1 – Set-up the contact and reference information for the vacancy

Log in to the HR Admin Panel. The **Vacancies** Tab will display all the vacancies that you have access to.

![Vacancies Tab](image)

Locate the vacancy for which you wish to send out reference requests. Click on the **Manage Vacancy** button.

![Manage Vacancy Button](image)

The **Vacancy Overview** screen will be displayed:
Web Recruitment – Generating Correspondence

AH0439: Programming Officer [Non-Clinical-Research]

Vacancy Overview

Applicants
- Process Applicants (25)
- Manage Manual Applicants (0)

Vacancy Configuration

Tasks
- Manage Rejection Correspondence
- Manage Reference Requests
- Manage CV Requests (1)

Correspondence

Awaiting Confirmation (0)
- Completed and Offered (1)
- View and Record Correspondence

Permissions

Notes (0)

Attachments (0)

Vacancy overview

Finished recruiting? Complete recruitment for this vacancy.

Welcome to the vacancy management area, from here you are able to:
- View and manage applications to the vacancy
- Handle rejection communications and reference requests
- Maintain vacancy permissions
- View and confirm tasks relating to this vacancy
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<thead>
<tr>
<th>Position ID</th>
<th>Status</th>
<th>Offered Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>79633288: Programming Officer [Non-Clinical-Research]</td>
<td>[Name]</td>
<td>29-Jun-2015</td>
</tr>
</tbody>
</table>

Application Stages

Application Stage: Overview

- Shortlisted
- Shortlisted: End
- Shortlisted: Review
- Offered

Applicant & referee report

Download an Excel extraction containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.
Select **Vacancy Configuration**.

If you have not done so already, enter the contact information for the vacancy. If you are an administrator sending letters on behalf of a colleague then you may enter another person's details into these fields.
Please note that if you update the contact information at any point, all correspondence that you have already generated, and which is awaiting confirmation, will be updated with the amended details. If you do not wish this to happen, you can confirm awaiting confirmation tasks before making a change to the contact information.

Once the Contact Information is complete, ensure that you check the Mark Contact Configuration as complete check box and click on Save Configuration.
Select the second tab in this window, Reference Correspondence

Select the reference request template that you wish to use.

Three templates have been developed:

- An academic template to assess an individual’s academic standing and potential, paying particular attention to his/her performance in teaching and research.

- A non-academic template for a general assessment of the individual’s suitability for the role.

- A non-academic form that is similar to the old PD15 form (i.e. a structured template for the referee’s assessment, which asks specific questions about generic skills, whether they would re-employ the individual etc.).
Enter the preferred date by which you would like referees to have responded to your request.

Once you have finished configuring contact information, click on the check box to Mark Reference Correspondence as complete and click the Save Configuration button.

Note: You also have the option on this screen to decide whether the returned references ought to be included in the application pack for members of the Appointing Body to review. The default is not to include them. Please see the Request references section of the Recruitment Guidance for information on when and when not to use references as part of the selection process.
Step 2 – Identify the applicant(s) and initiate a reference task

Select **Manage Reference Request** from the Tasks section of the navigation menu.
Select the stage of the process that you are currently working in from the drop down box.

The applicants at this stage and their referees will be displayed. Where the applicant has indicated on the application form that they do not wish the referee to be contacted before they have been made an offer, the referee will be displayed in grey and shown as not contactable until the applicant is recorded in the system as having accepted an offer.
Select the applicants for whom you wish to send a reference request and click on **Request References**.

A confirmation message will be displayed and **Awaiting Confirmation** will be displayed in the status column for the referees that have been selected.

**Note:** You can use the automated reference template as the basis for your manual reference request by clicking on the drop-down menu next to the **Upload** button and then selecting **Download Letter**.
Select **Open** in the pop-up window.

This will open a PDF that you can copy (or edit in Adobe Acrobat)
A reference task will also have been created under the **System Managed** tab on the **Correspondence awaiting confirmation** menu:
Step 3 – Set the reference task to manual

You can now switch the reference to manual by selecting Set to manual from the actions menu.

You will be asked to confirm the action:

Confirm Action
Are you sure you want to set this task to Manual?

Yes  No

When you refresh the screen the task will then be shown under the Manual tab:
### Manual Tasks Awaiting Confirmation

Below is a list of manual tasks that are awaiting manual correspondence to be recorded.

- Press Preview to view the correspondences as it will be seen by the recipient.
- Press Set to System Managed to change the type of the task to System Managed.
- Press Confirm once you are happy with the correspondence.

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Created By</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kumar, Manash</td>
<td>Greggs, Margaret</td>
<td>08-Jan-2015 10:36:52</td>
<td>Confirm Correspondence</td>
</tr>
</tbody>
</table>

(1 of 1)
Step 4 - Record details of the correspondence sent to the applicant

Click on **Record correspondence** under the action menu:

![Image of the Chris system interface showing the Record Correspondence function]

Complete the details of the correspondence:

![Image of the Record Manual Correspondence form]

Click on the **Record Correspondence** button:
A confirmation message will be displayed in the top right hand corner of the screen:

![Correspondence Recorded]

Note: You can also mark the task as complete on this screen:

Select the task and then click on the **Mark complete** button.

Confirm the actions:

![Confirm Correspondence]

The task will be moved to the **Correspondence - Completed and others** menu.
Web Recruitment – Generating Correspondence

Task List for Clinical Research Associate (NS04258):

- Name: Emma Douglas
- Task: Reference Task
- Type: Letter
- Date: 12-Jan-2015
- Time: 14:40:31
- Status: View

Completed and Others (1):

- View or Record Correspondence

Vacancy Overview:

- Applicants
  - Process Applicants (32)
  - Manage Manual Applicants (5)
- Vacancy Configuration
- Tasks
  - Manage Selection Correspondence
  - Manage Reference Requests
  - Manage CIE Requests
- Correspondence
  - Completed and Others (1)
- View or Record Correspondence

Permissions

Notes (0)

Attachments (0)
Step 5 – Upload the returned reference

Once a referee has returned a reference, it can be uploaded against the applicant’s record in Web Recruitment.

On the Manage reference requests menu click on Add reference.

Complete the details of the returned reference and click on Submit Reference.
A message will be displayed in the top right of the screen in order to confirm the action.

The uploaded reference will appear as an icon next to the reference task.

Note: You can click on the icon to view the reference again.
7. Recording other correspondence and viewing history

You can use this screen to view all system managed correspondence and also to record other non-system correspondence such as other emails, letters and phone calls to applicants.

Select **View or Record Correspondence** from the **Correspondence** section on the left of the screen.

To record other types of non-system correspondence, select **Record Correspondence**.
The **Record Correspondence** window will be displayed.

Select the relevant applicant from the drop down list. Select the Contact Type and Contact Format; enter the Date, Summary/Subject and Details. Once complete, click on the **Record Correspondence** button.
The entry will appear in the table.

All correspondence will be listed; you can choose to filter by Rejection, Reference or Other if required.
8. Cancelling a correspondence task

Please note that before you undertake this task you should ensure that the vacancy configuration information is complete. See previous section.

If you wish to cancel any type of correspondence task you can do this from the **Correspondence Awaiting Confirmation** menu option on the left menu bar.

Tick the task you wish to cancel and click on **Cancel Selected Tasks**.
You will be asked to confirm the cancellation.

When you refresh the screen the task will have been removed.
Note: You will not be able to complete recruitment for a vacancy when tasks are outstanding so you should cancel or revert any remaining tasks to manual before closing the vacancy.

It is strongly recommended that you revert the outstanding tasks to manual so that you have the opportunity to record the alternative non-system method of contact you used for the task. This has the advantage of providing a clear audit trail should any queries/issues, or an internal recruitment audit, occur in the future.

Note: It is very important that you mark recruitment as complete for a vacancy within 12 months of the closing date for online applications 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 and 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).
See the guide to Managing Vacancies and Applicants on the HR Systems pages for more details.
9. 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. See previous section.

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 task you wish to process and click on Set to Manual using the option on the actions 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 you have decided to send.

Note that you will not be able to complete recruitment for a vacancy when tasks are outstanding so you should cancel or revert any remaining tasks to manual before closing the vacancy.

It is strongly advised that you revert the outstanding tasks to manual so that you have the opportunity to record the alternative non-system method of contact you used for the task. This has the advantage of providing a clear audit trail should any issues/queries, or an internal recruitment audit, occur in the future.

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