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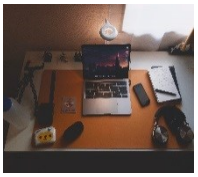

# Web Recruitment Release 5, March 2019

## Managing Offers

HR Systems

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# 1. Introduction

This manual provides instructions on how to process Offers and request contracts through Web Recruitment. The vast majority of contract requests can be made through RAS and Web Recruitment

- The requirement for vacancy administrators in departments/institutions to use CHRIS/10 form for the majority of appointments has been removed:
    - You can use the Offers section of Web Recruitment to record details about the offer and appointment even when Web Recruitment has not been used to collect applications. For example, this includes Research Fellows named on a grant, cases where you have used a recruitment agency, or cases where a department chooses not to use Web Recruitment to collect applications for a particular vacancy.
    - You can now use Web Recruitment to make offers for internal secondments, Marie Curie fellowships and apprentices.
    - Supporting documents for an appointment (and Tier 2 Certificate of Sponsorship application, if required) can be uploaded; and
    - An electronic Appointment Request is submitted to the HR New Appointment team.
- The Offers section allows vacancy administrators to pre-fill details about the applicant (from their online application form) and the position (from CHRIS) including information that supports the HESA return;
- Vacancy administrators 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;
- Vacancy administrators download a cover sheet for any supporting documents being sent to the HR New Appointment Team outside of the system;
- Details of how and when offer letters were sent to the successful candidate are recorded;
- Offer letter history is stored.
- The New Appointment Team receive and view appointment requests online within a HR Processing section of the system; and
- The New Appointments team transfer details of the applicant or preferred candidate and appointment into CHRIS.

If you have technical queries about the Web Recruitment System, then get in touch with the **CHRIS Helpdesk:** chris.helpdesk@admin.cam.ac.uk. If you need advice about making appointments, then talk to the New Appointments Team: hrnewappointmentteam@admin.cam.ac.uk.

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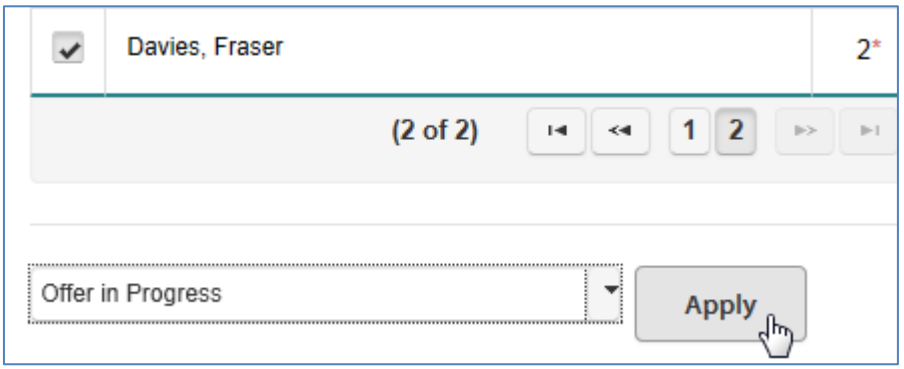
# 2. Selecting a Successful Applicant to Move to Offer Stage

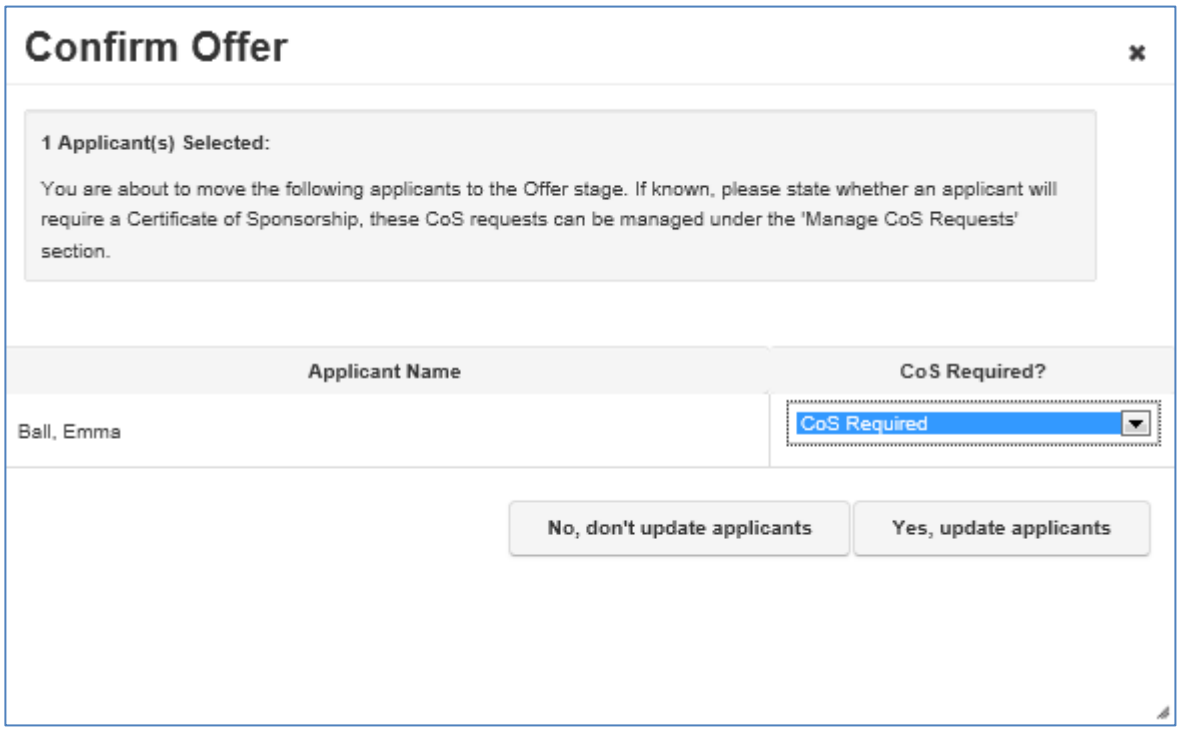
This section is not necessary where you have not used Web Recruitment to collect applications for most applicants (e.g. where you are making an offer to a Research Fellow named on a grant or you have used an agency). See section 2.1 for details.

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

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




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




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

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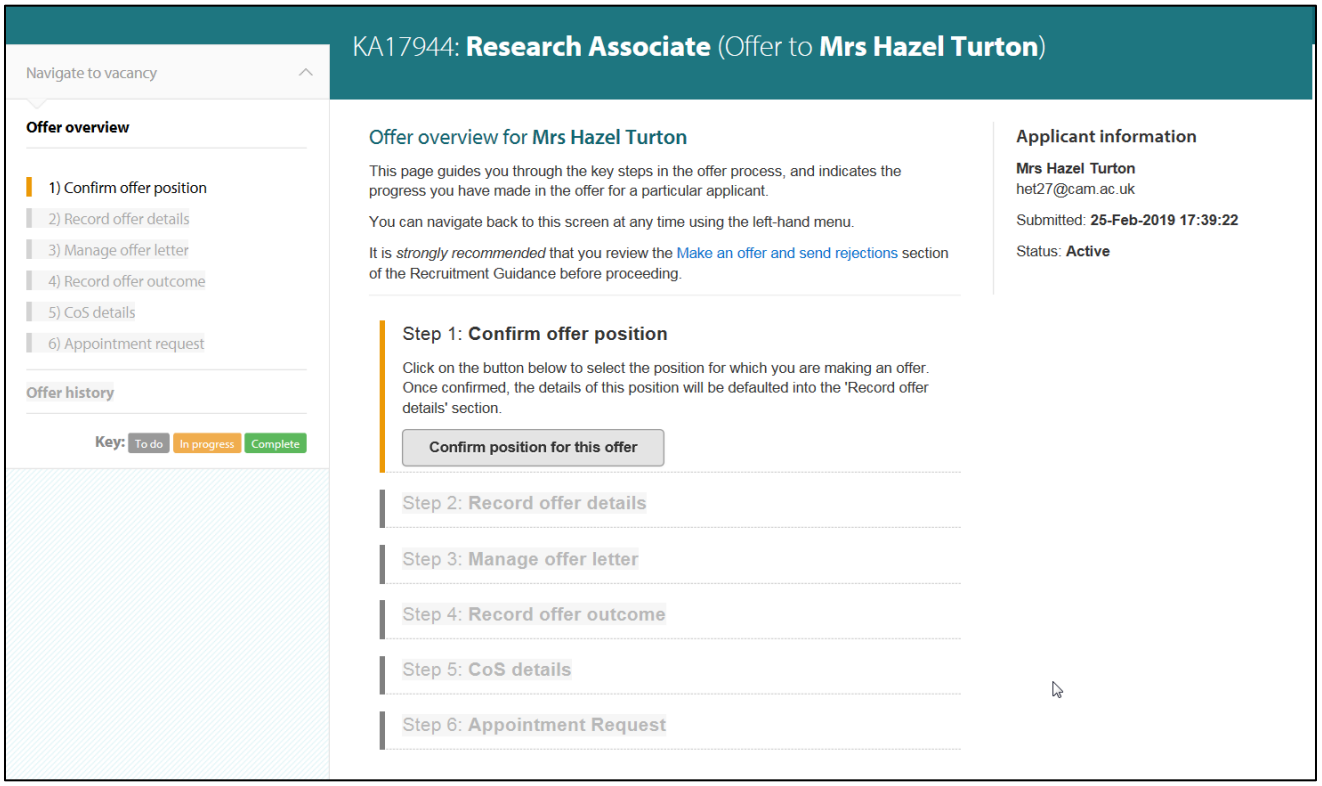
3. As required, you can amend the default option by selecting from the drop-down list. Once you have made any changes and you wish to move the successful applicant to the Offer stage, click on the **Yes, update applicants** button.

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

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




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

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

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

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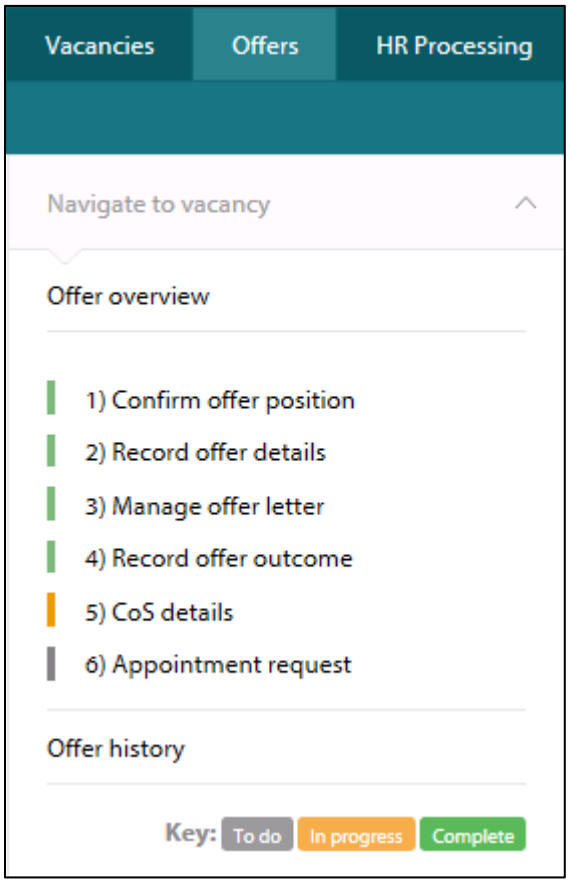


The following sections of this guide describe each of the six steps in the offers process in detail.

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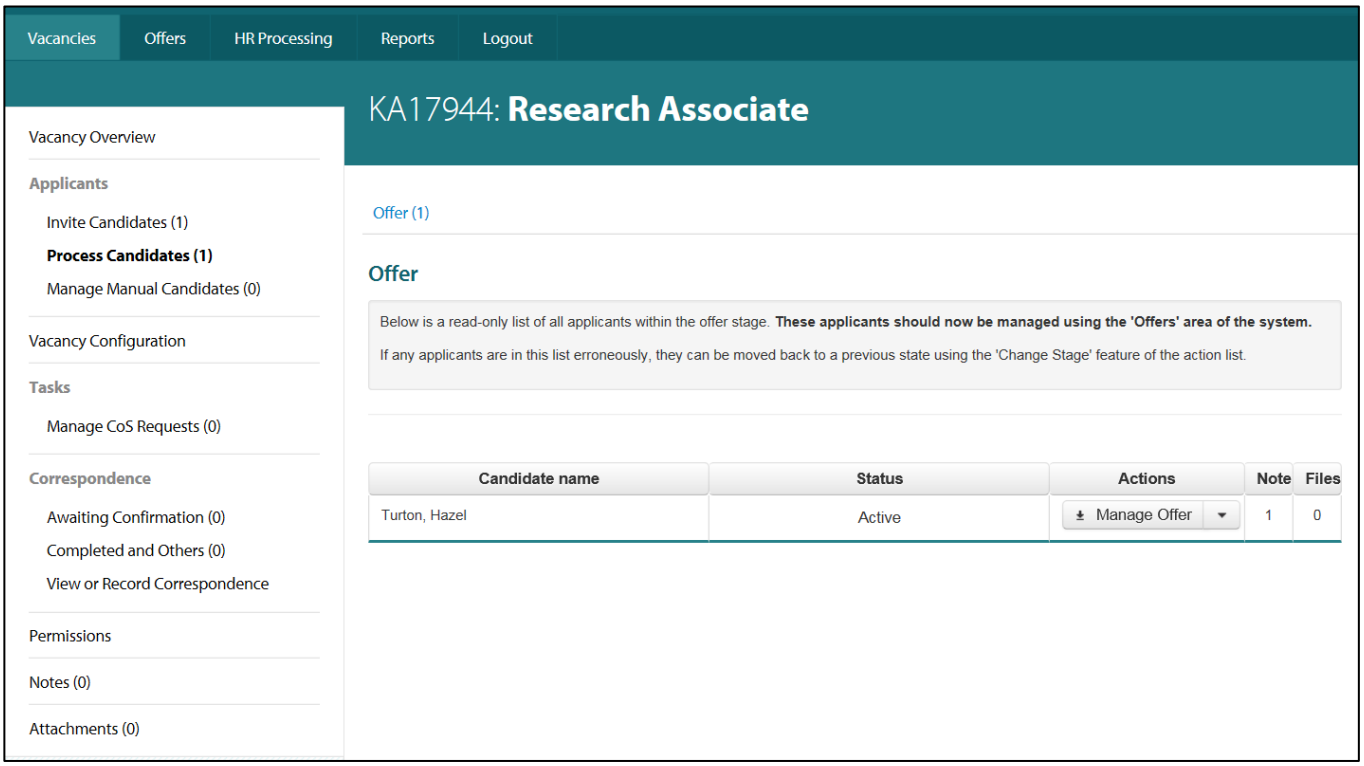
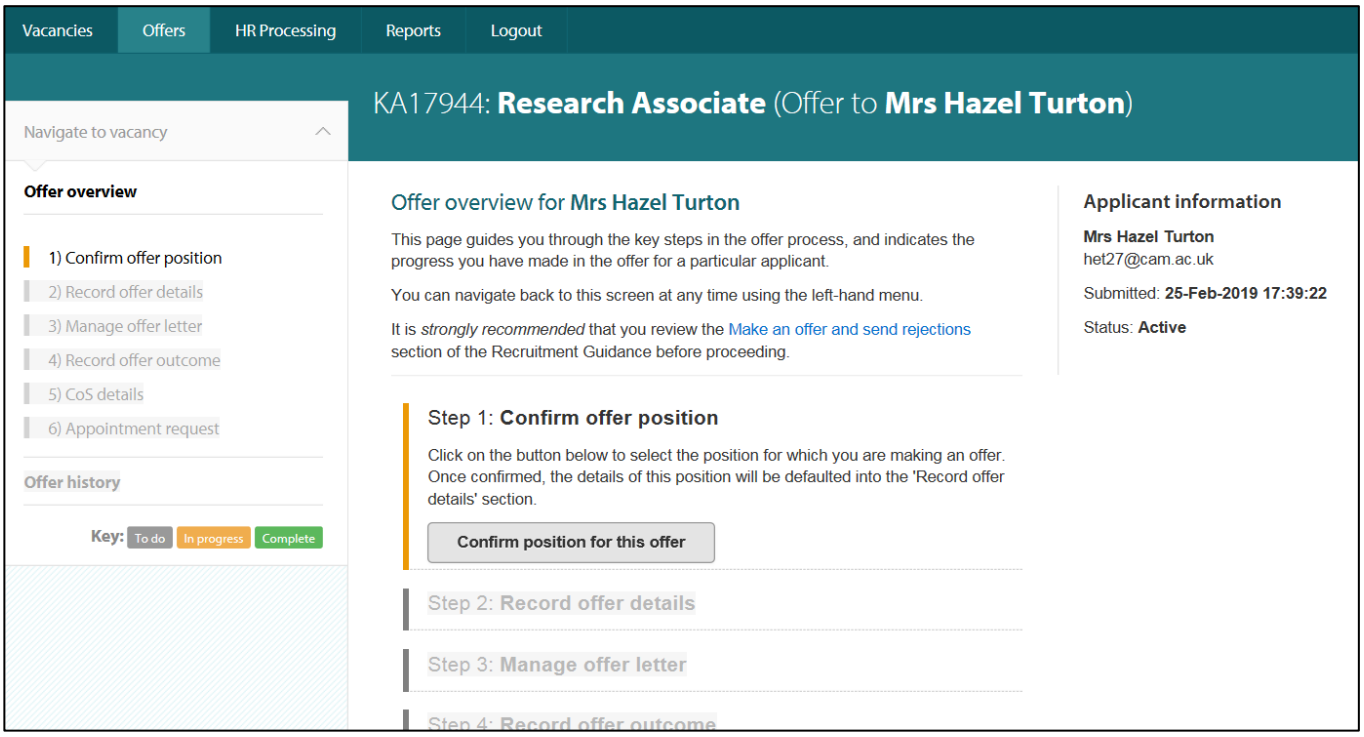
## 2.1 Selecting a Preferred Candidate to Move to Offer Stage

For a vacancy where you are not collecting applications through Web Recruitment, applicants are immediately moved to the Offer stage, so that you don't need to do this yourself. You can click on manage offer straightaway and request their contract.



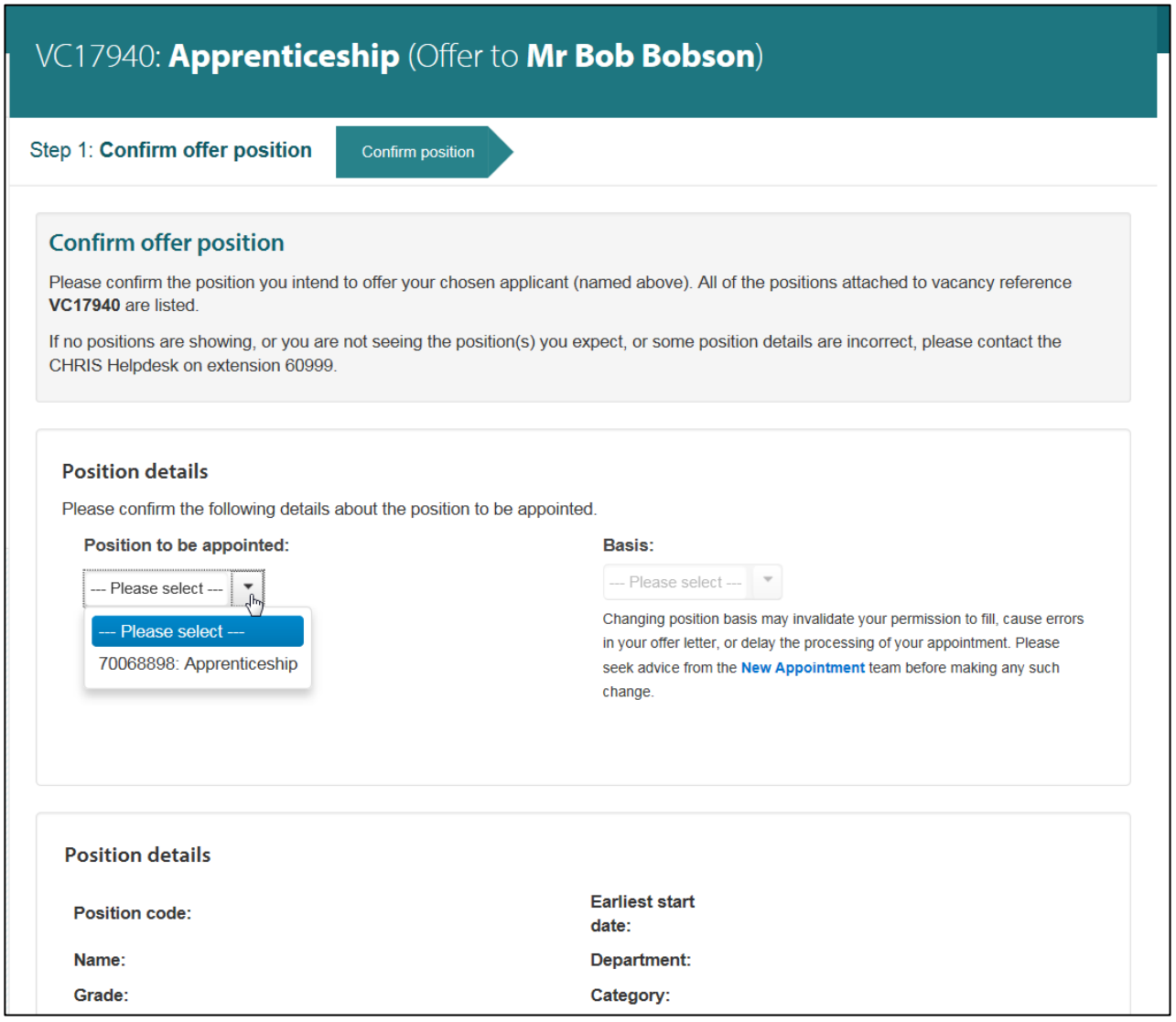

The subsequent steps for the offer process will be as detailed in the instructions below.



# 3. Step One - Confirming the Offer Position

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

2. The following screen will be displayed:




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

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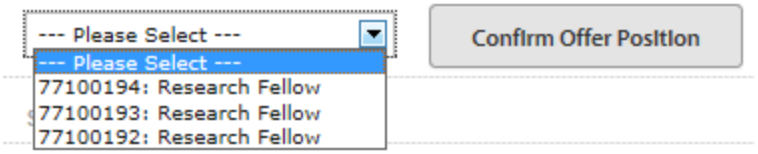
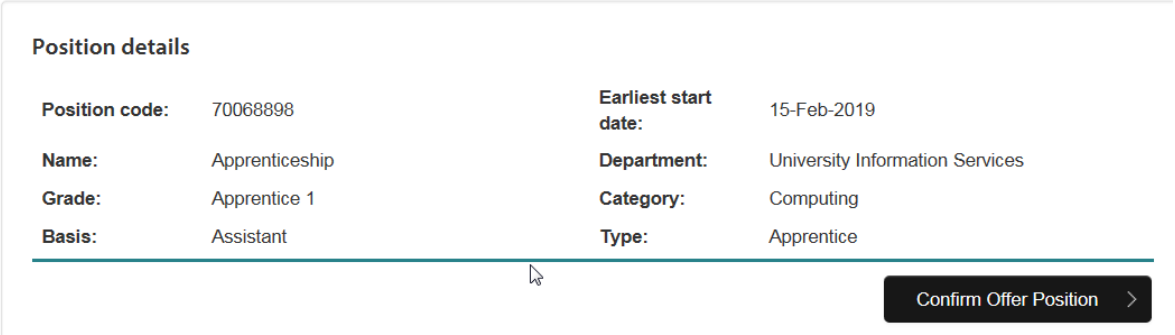
In some cases, for example, if you were seeking permission to fill multiple identical vacancies and used the 'Number of vacancies' field on Step 1 in the Recruitment Administration System (RAS), there will be a corresponding number of positions for the vacancy in CHRIS and Web Recruitment. In these situations, you will need to select the correct position from the drop down list.




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




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

Valid options for basis are shown in the table below:

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

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

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

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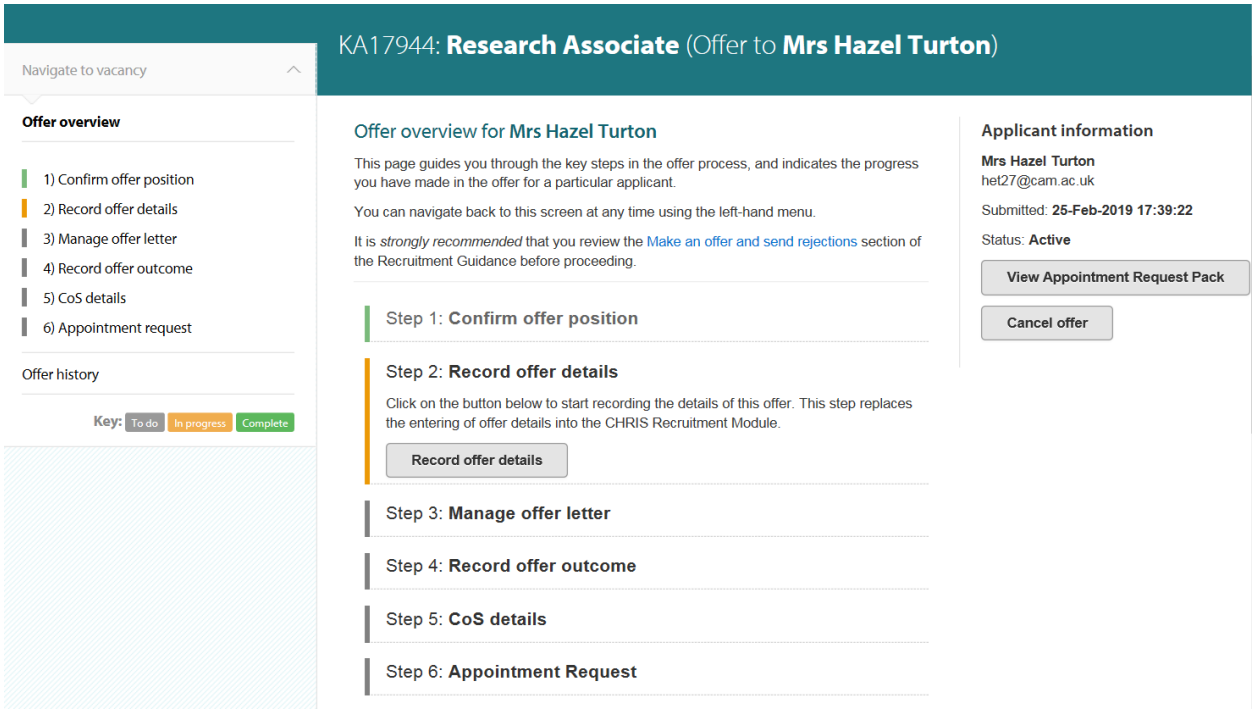
5. Once you have checked that you have selected the right position and you are satisfied that the details are correct, click on the **Confirm Offer Position** button.

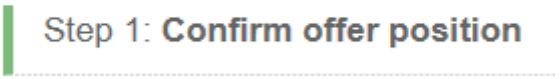
   Please note: speak with the New Appointment Team if you believe any of the position details are incorrect.

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

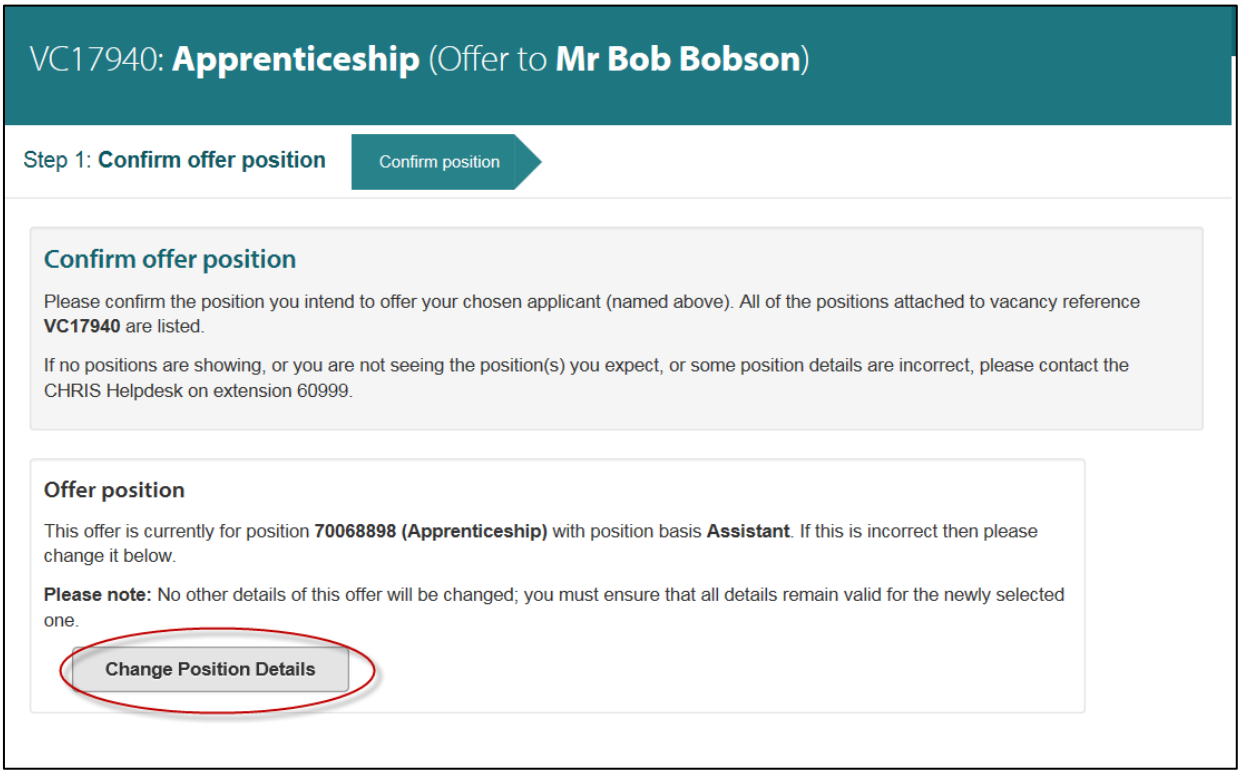



7. Before you have submitted an Appointment Request to the New Appointment Team, you can go back and modify the offer details, including switching to a different position.

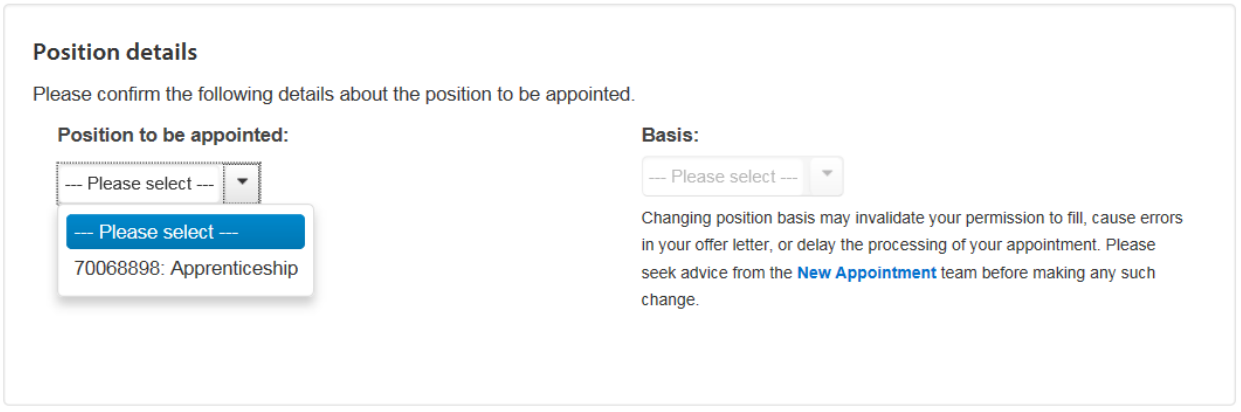
   a) You can change the position for the offer by going back to the **Offer overview** screen. Click on **Step 1 Confirm offer position**.

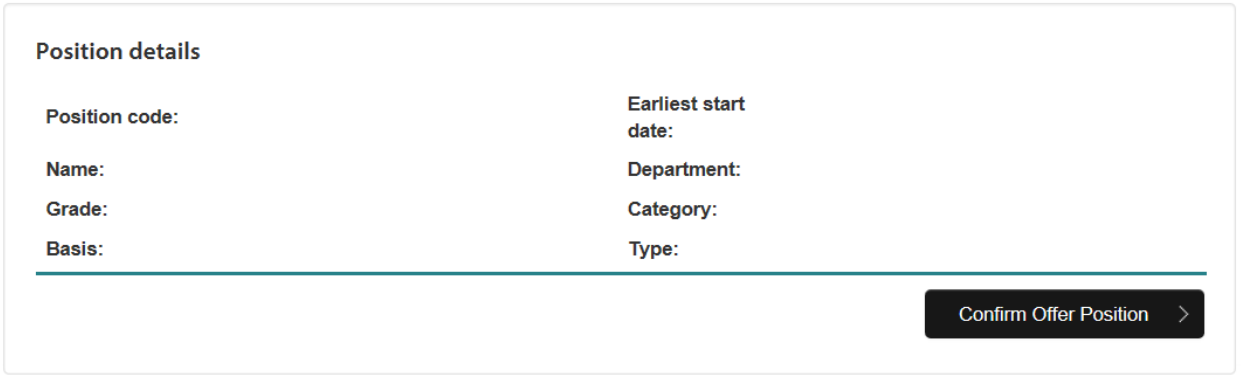


b) Click on the **Change Position Details** button and you will be asked to select a new position.




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




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

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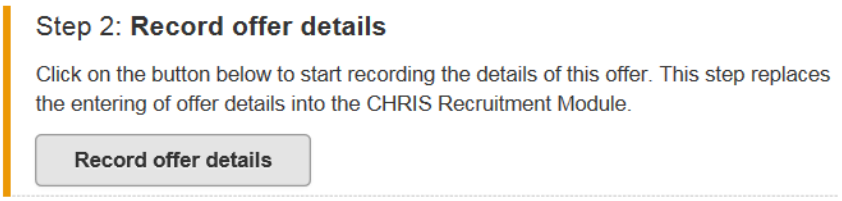
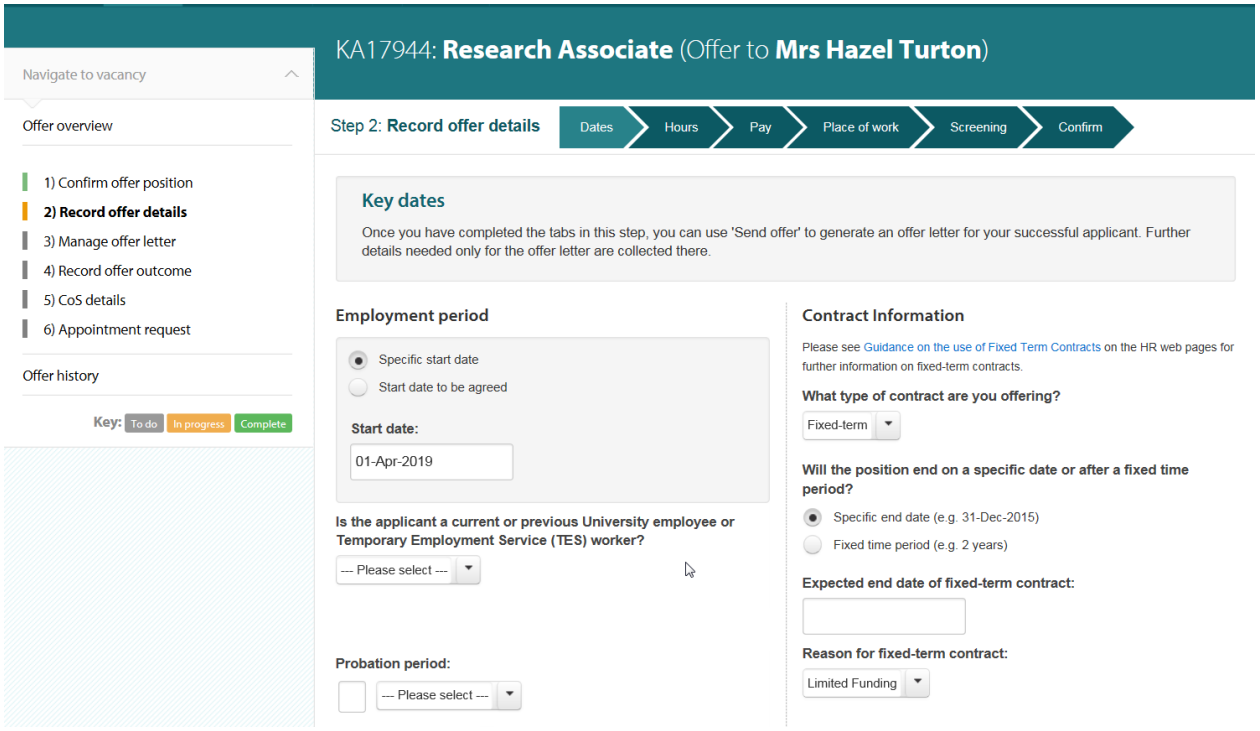
# 5. Step Two - Recording Offer Details

Once you have clicked on Step 2 **Record offer details**,




you will see the screen below for the applicant and position that you have selected.

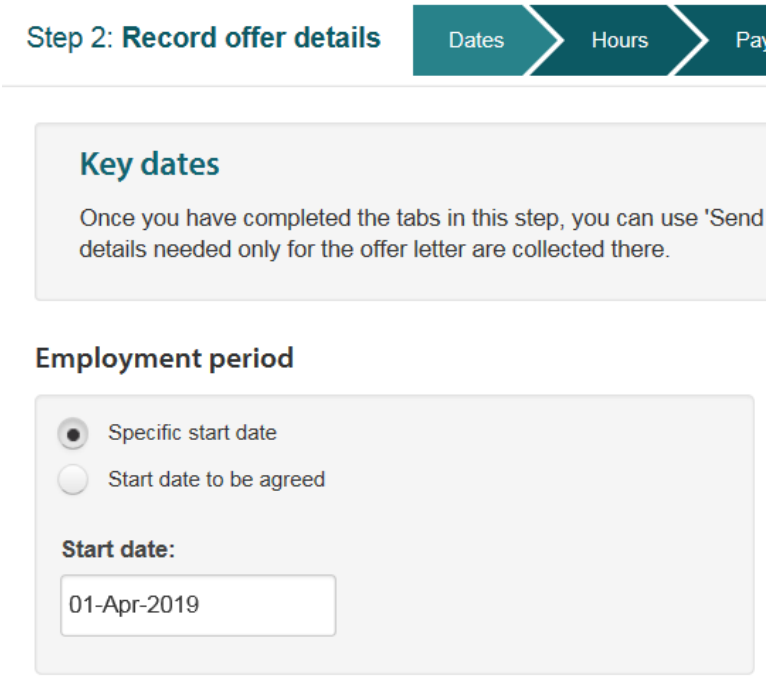



The vacancy reference, description and applicant are displayed at the top of the screen with the six tabs that need to be checked, entered or confirmed in this step of the process.

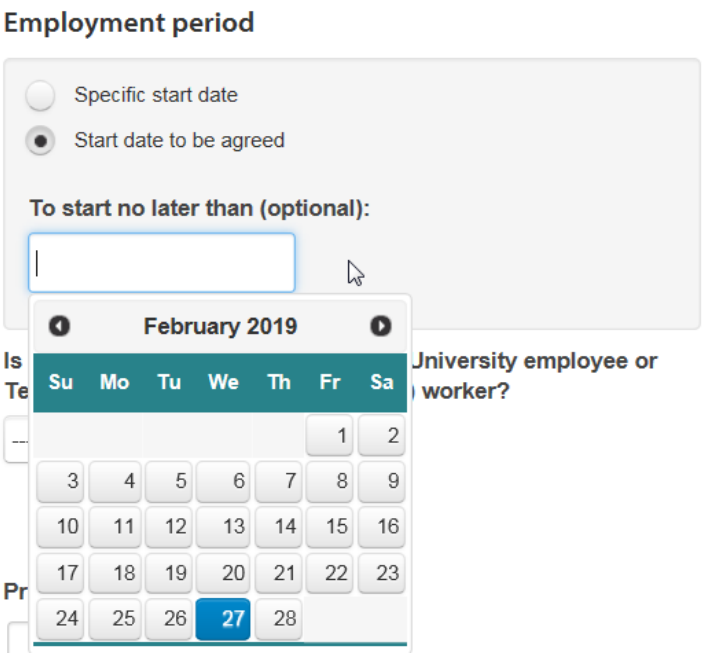
## 4.1 Entering key dates for the offer

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

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

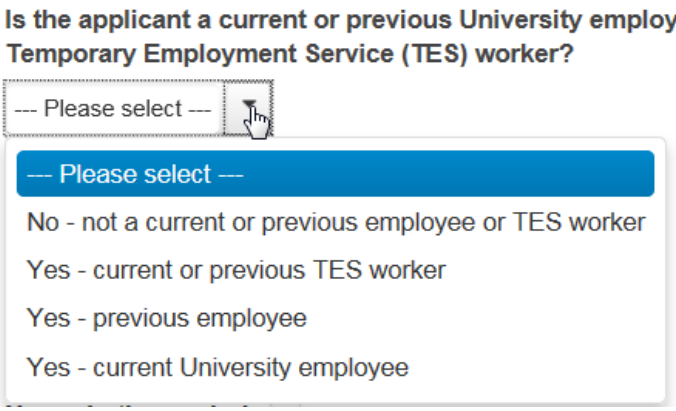



2. If a specific date has been agreed, or if you have a latest date by which you require the successful applicant to commence work, you can enter this in the **Start date** or **To start no later than** field using the date picker.



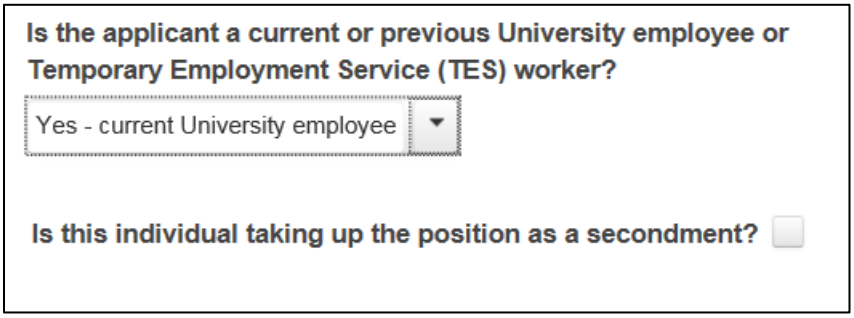
Please note: if you do enter a select a date in the **To start no later** than field, this will be included in any system-generated offer letter that you create (it will say 'To be agreed, but no later than [date]' in the start date section).

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




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

Where Yes – current University employee is selected the option to indicate whether the individual is taking up the position as a secondment will be displayed.




Where the secondment option is ticked indicate whether they will hold the position as an internal secondment and, if so, whether it is in the same institution or in another.

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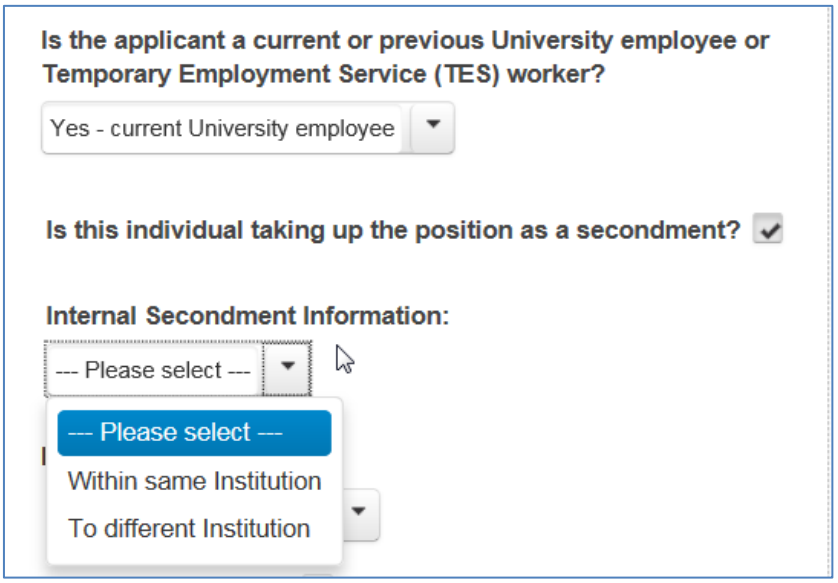
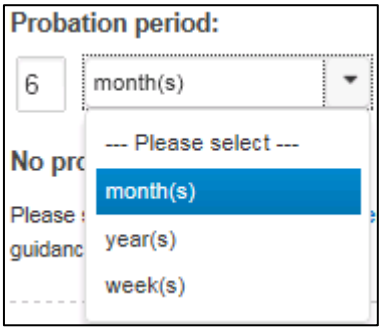


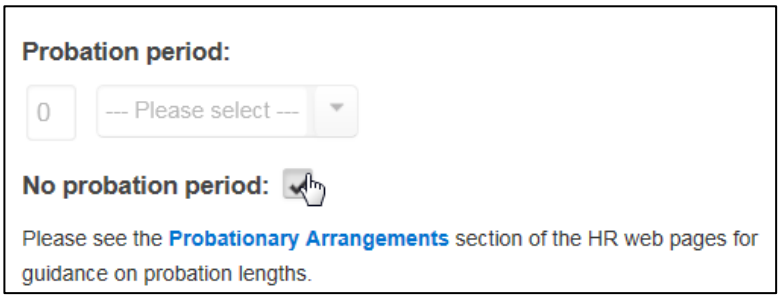

If the secondment is to a different institution you will be asked to supply the authorisation from their current institution in the Appointment Request step. There is no need to complete a separate CHRIS/71.

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

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



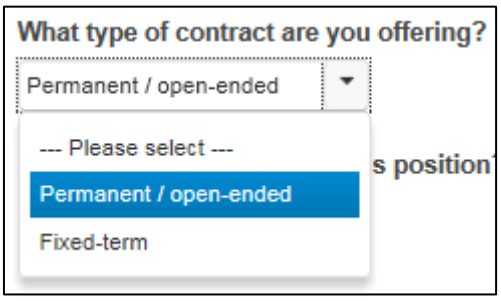

Alternatively, in exceptional cases where there is no probation period, you can indicate this by ticking the check box.



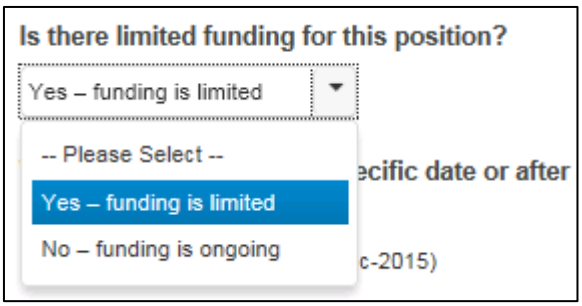
Please note that you can also click on the blue hyperlink on screen to open the University's Probationary Arrangements in a new window.

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

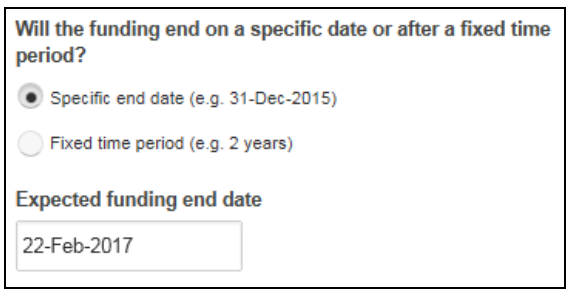
   First, indicate the type of contract in the drop down box:

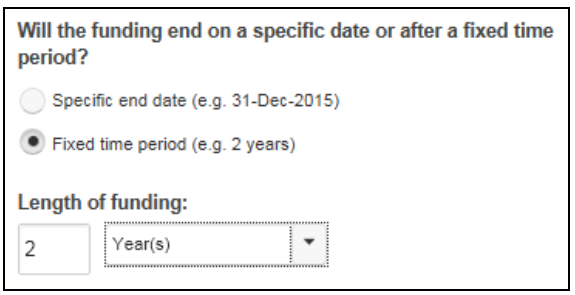



   If you select **Permanent/ open-ended**, you will then need to indicate whether the funding for the position is limited or not.




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




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

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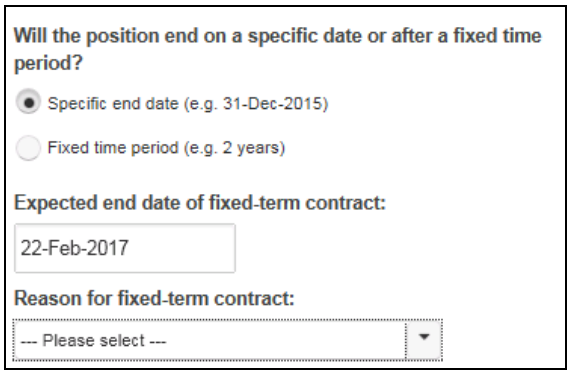
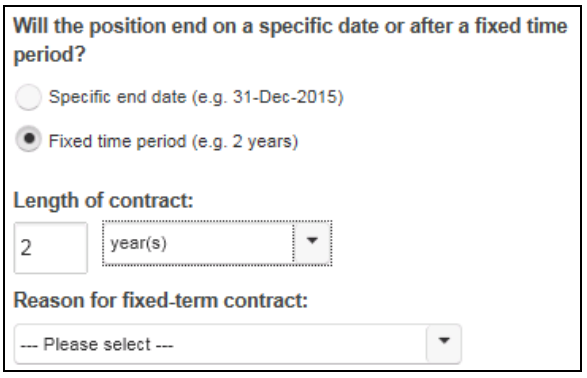
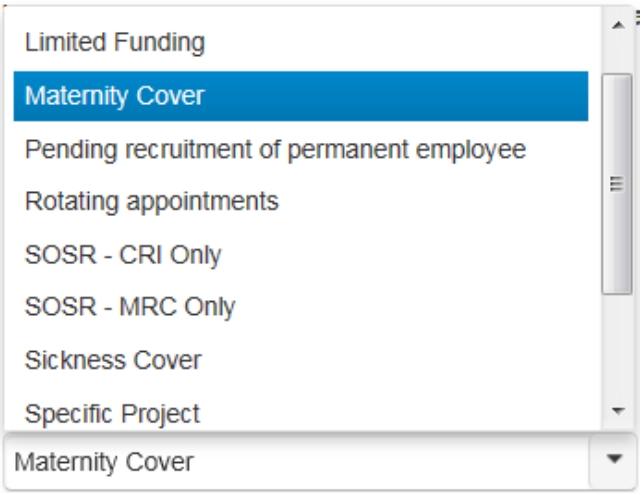



You will then also need to select a **Reason for fixed term contract** (this is your objective justification for offering the appointment on a fixed-term basis; please see the University's Guidance on Fixed-Term Contracts at http://www.admin.cam.ac.uk/offices/hr/policy/fixed/ for further details) from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




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

| Reason | Paragraph used in offer letter |
|---|---|
| All | Your employment will end on [end date], unless previously terminated in accordance with your contract of employment. This end date is because…[followed by the wording for the relevant reason below] |
| Limited funding for a specific purpose | …your employment relies on the availability of finite funds for a specific purpose that are not part of the University's general revenues. |
| Pending permanent appointment | …you have been appointed temporarily pending the recruitment of a permanent member of staff. |
| Rotating appointments | …this is a rotating appointment with a maximum duration defined by the University's Statutes and Ordinances. |
| Specific project with defined timeframe | …you have been appointed to undertake a specific project of finite duration. |

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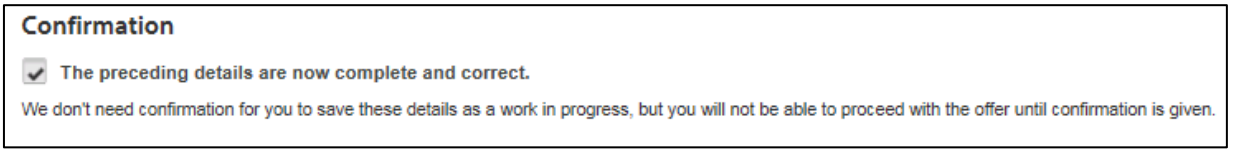
| Reason | Paragraph used in offer letter |
|---|---|
| Temporary cover (maternity) | …you have been appointed to provide temporary cover during the absence of another member of staff on maternity leave. |
| Temporary cover (sickness) | …you have been appointed to provide temporary cover during the absence of another member of staff. |
| Temporary cover (not sickness or maternity) | …you have been appointed to provide temporary cover during the absence of another member of staff. |
| Training | …you have been appointed to a traineeship. |
| Transitional duties pending a reorganisation | …you have been appointed to undertake transitional duties pending a reorganisation. |
| SOSR - MRC Only; SOSR - CRI | …you have been appointed to a three year training programme. |

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




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

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

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

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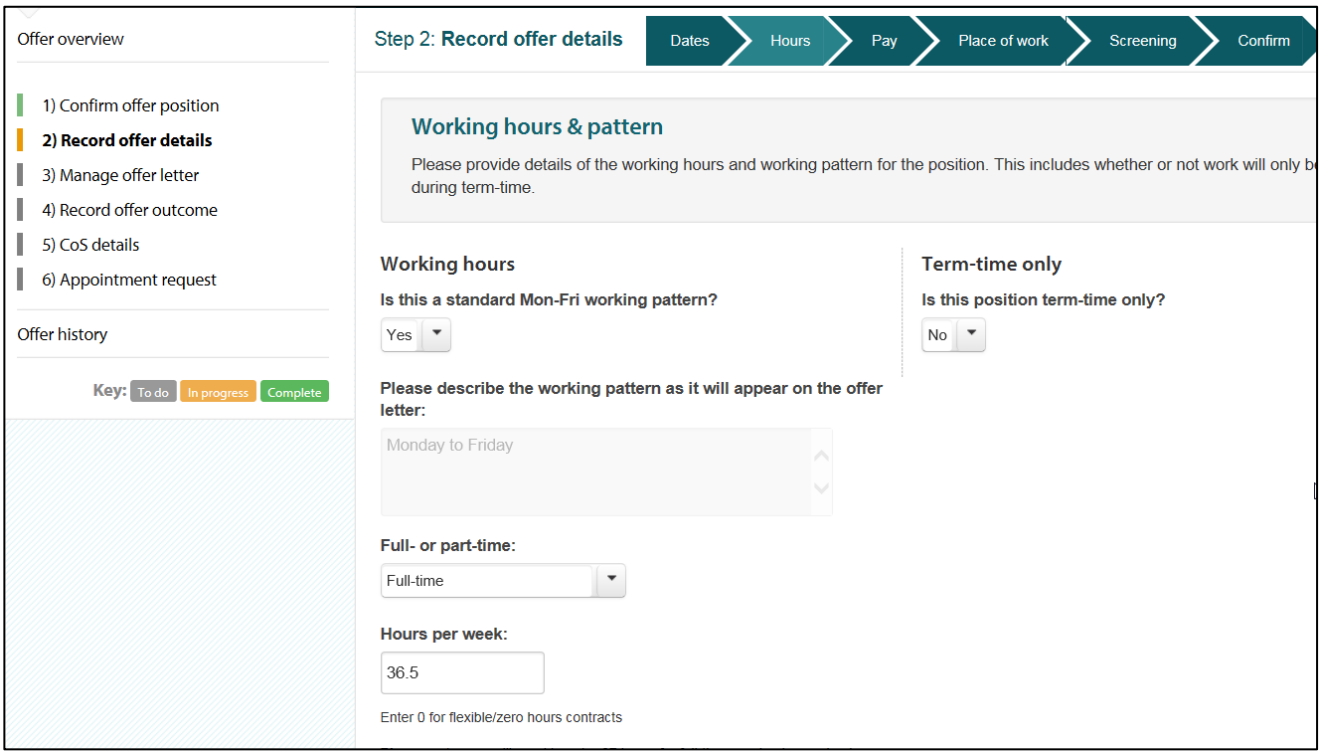
## 5.2 Entering hours and work patterns

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




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

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

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

Further details are provided below.

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

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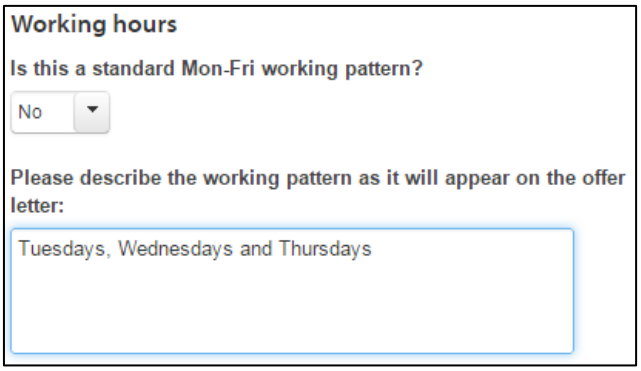
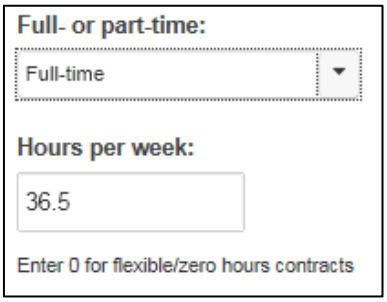



For assistant staff positions, the text entered here will be displayed as part of a sentence in the working hours section of any system-generated offer letter. See the assistant staff section of the table found at http://www.hr.admin.cam.ac.uk/policies-procedures/hours-work for an example.

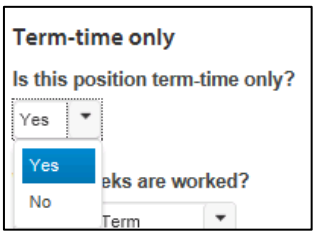
2. Check the details regarding whether the position is full-time or part-time and the hours per week, amending these as required in accordance with the offer you plan to make.



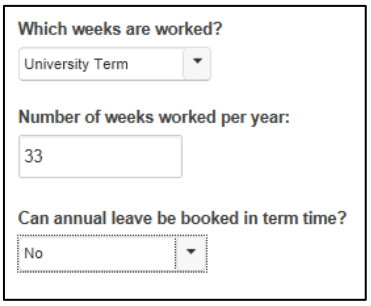

Please note that in the **Hours per week** field you will need to enter 37 hours for full-time academic, academic-related and research staff, although in some cases there are no defined contractual hours. This will still be reflected correctly in the system-generated offer letter.

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

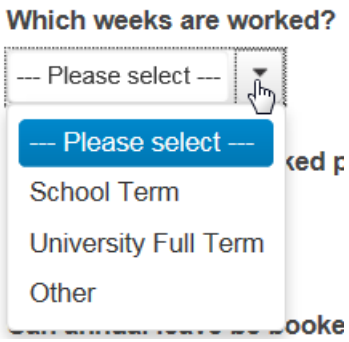
3. Check the default response to '**Is this position term-time only?**'. If it is not correct then use the drop down list (selecting **Yes** or **No**) to modify it.




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



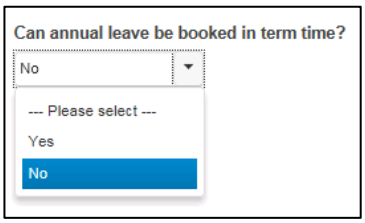

a) For **'Which weeks are worked?'**, choose the required type of term from the drop-down list.




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

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

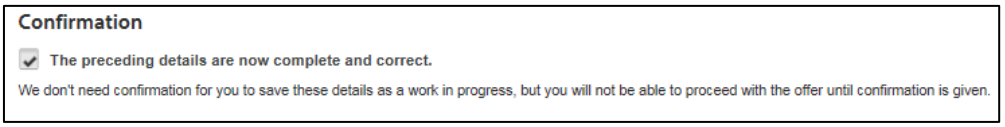
c) Select a response from the drop-down list after '**Can annual leave be booked in term time?**' field, based on whether the successful applicant will be permitted to take leave during the weeks that he/she works or if he/she will be expected to receive pay in lieu for accrued leave. Seek advice from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



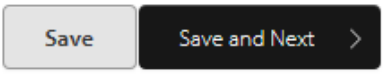

Please note that if you select **No** from the drop-down then the following wording will be inserted into holiday entitlement section of any system-generated offer letter that you create.

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

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

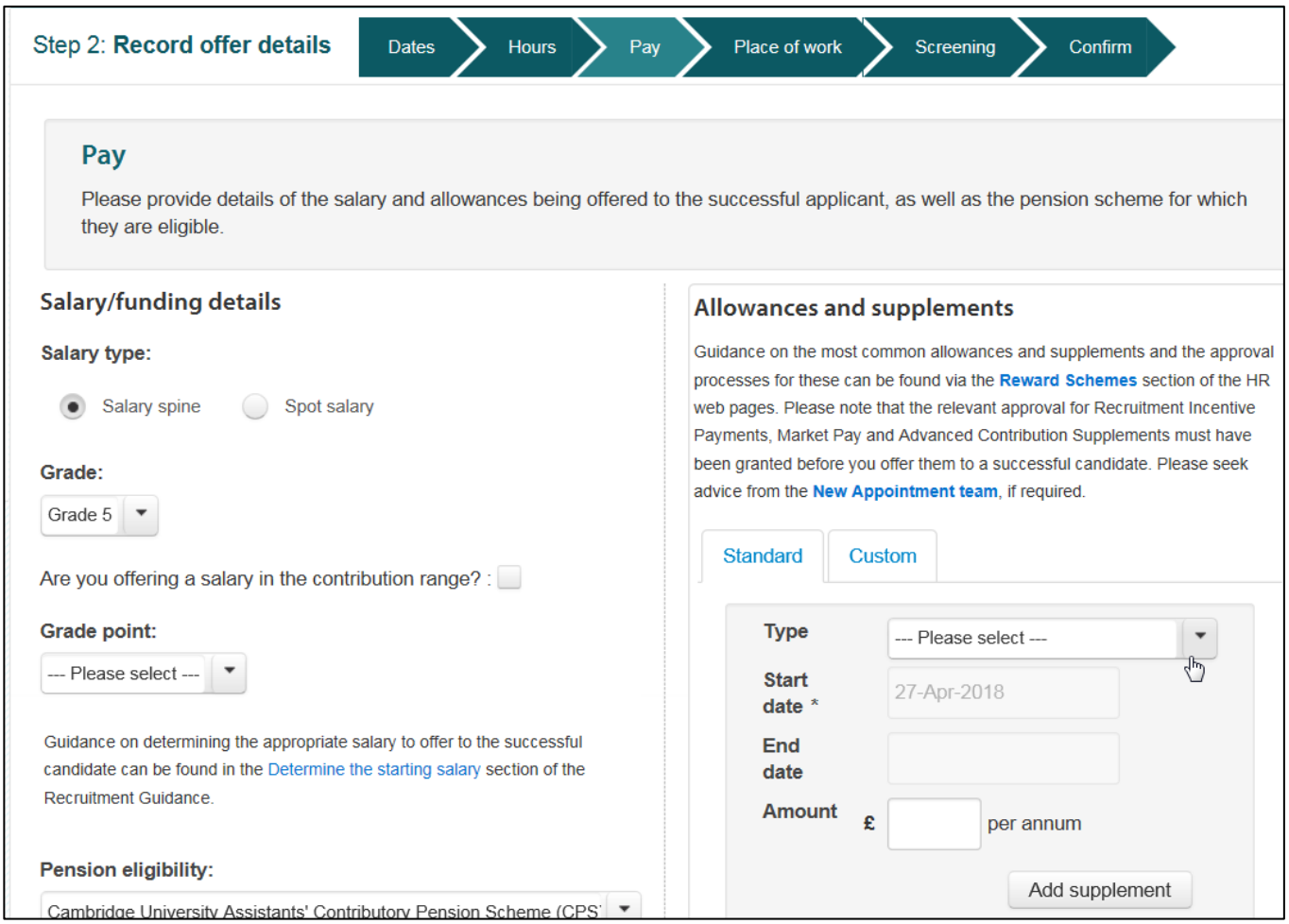



6. Click on **Save and Next**. You will be routed to the next tab in the Record offer details section.



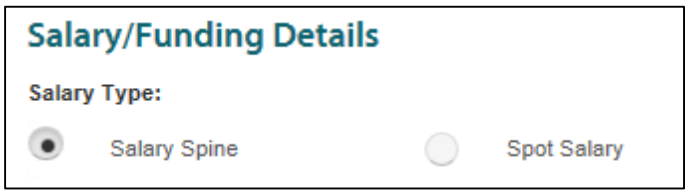

## 5.3 Entering pay and other remuneration details

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



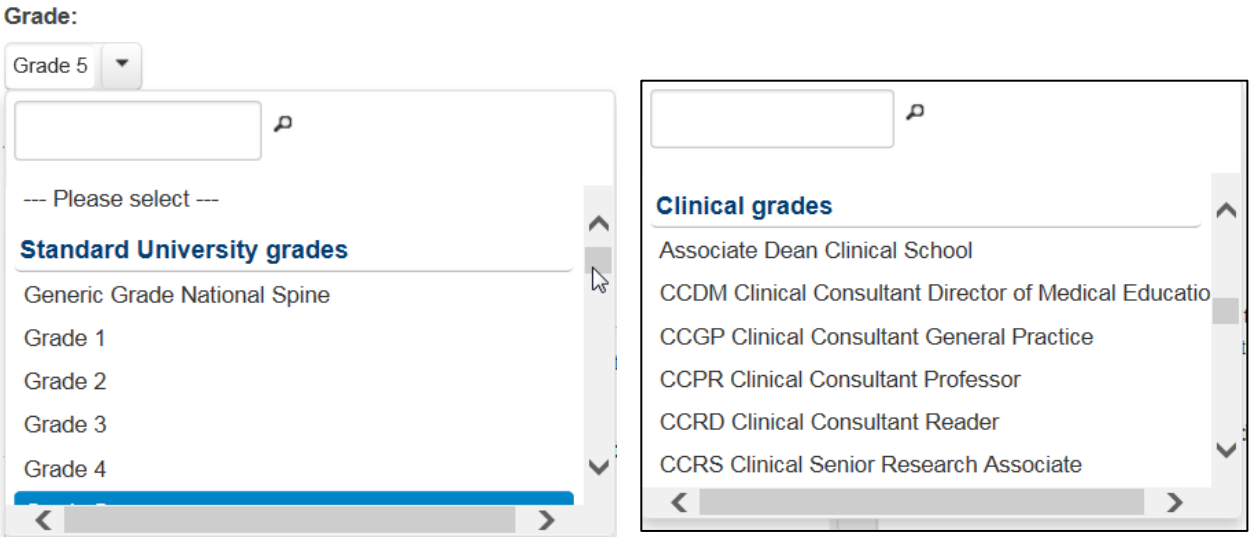

1. The **salary type** will be defaulted to **salary spine** or **spot salary** (normally the former), based on the position details held in CHRIS (and any entries made when requesting permission to fill in RAS).

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



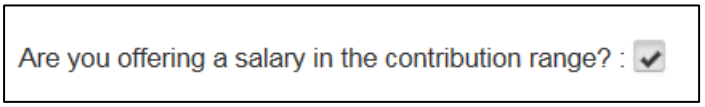

2. If **Salary Spine** is selected (as a default or by you), you will also need to check:

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




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

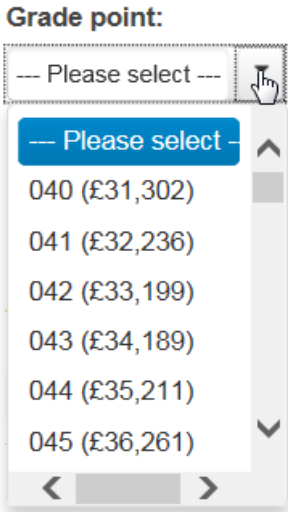
   b) If you intend to offer a salary in the contribution points for the grade, tick the check box to the left of '**Are you offering a salary in the contribution range?**'.




Please note that you should not tick the box unless you have gained approval to offer a salary in the contribution range from your HR Business Manager/Adviser via the HR4 Salary Case for Approval process. You will be required to provide an approved HR4 later

in the process when requesting an appointment. Please see the Determine the starting salary section of the Recruitment Guidance for full details.

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




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

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

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

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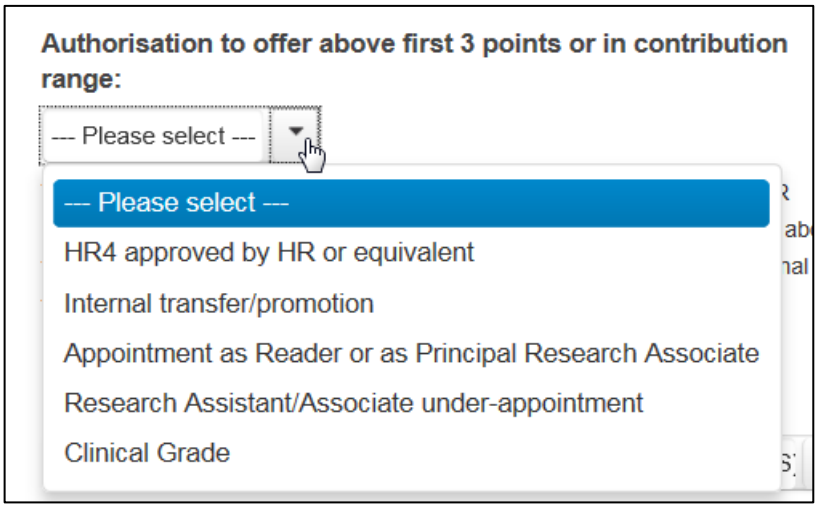
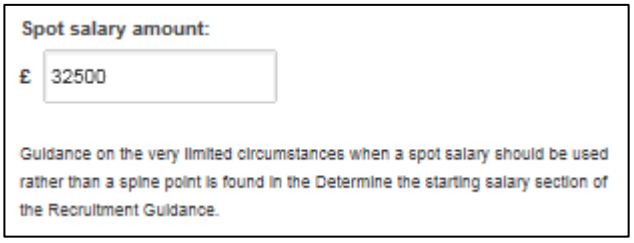
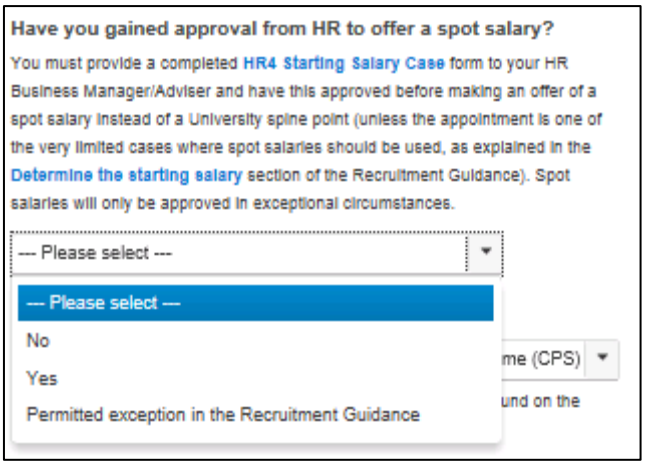



Please note that when an HR4 has been approved, you will be asked to provide a copy of this later in the process when requesting the appointment.

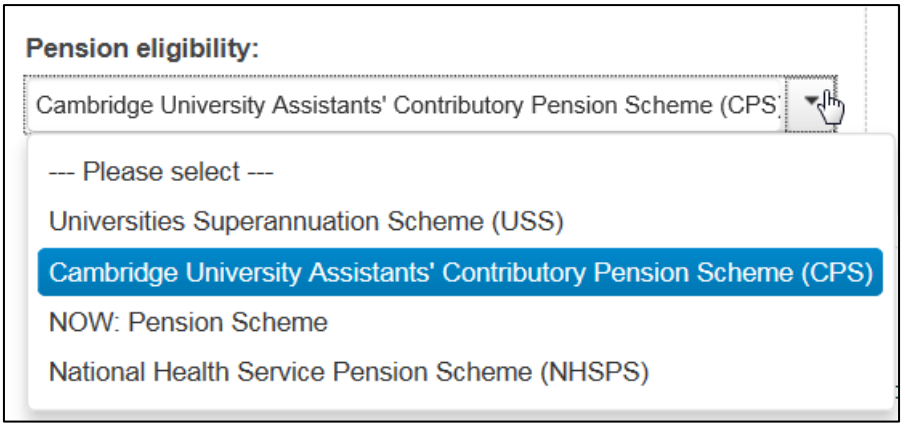
3. If **Spot salary** is selected you will need to enter the **spot salary amount**.




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

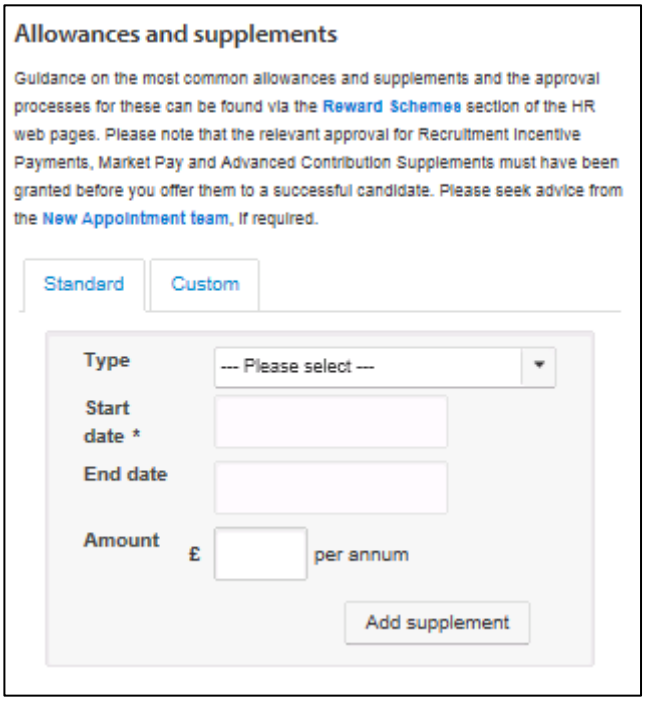


4. Check (and amend as required) the default pension scheme for the position.




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

5. Add any allowances and supplements for the position.

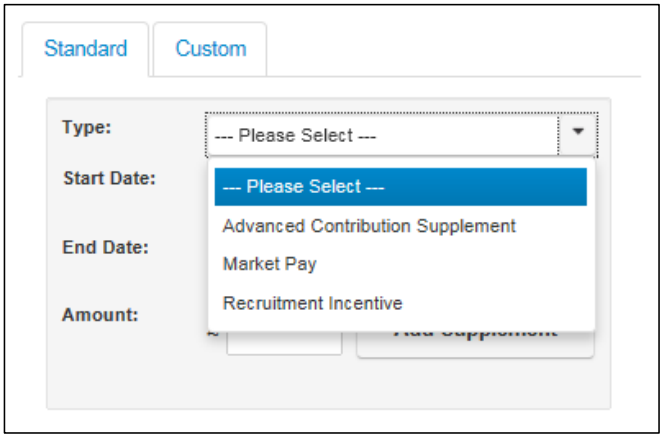


There are two tabs. The first tab ('standard') is for the following:

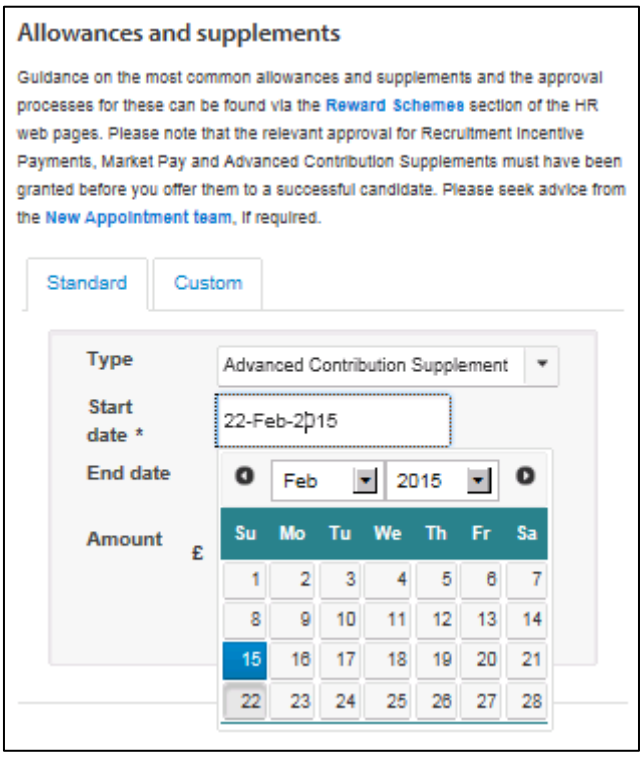
- Advance contribution supplement;
- Market pay; and
- Recruitment incentive payments.

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

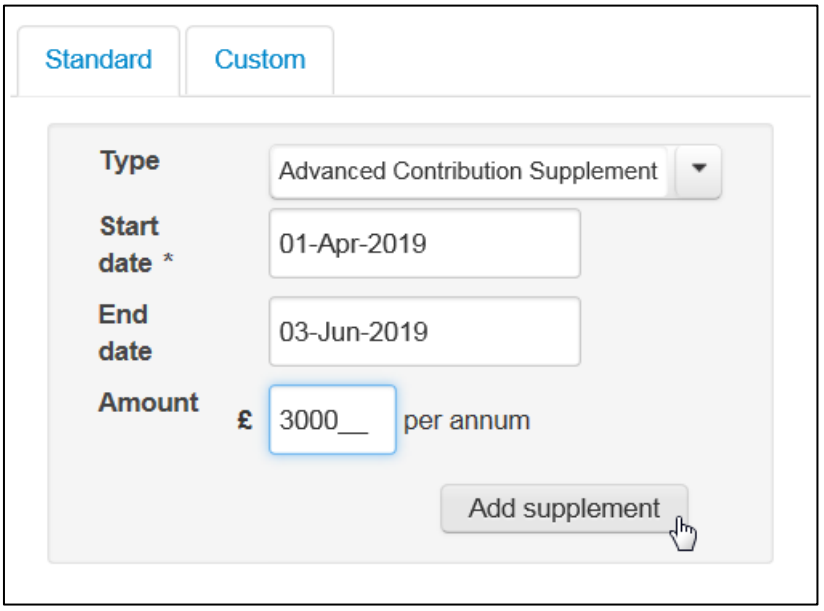
a) For a 'standard' allowance/supplement, select the type from the drop down list.



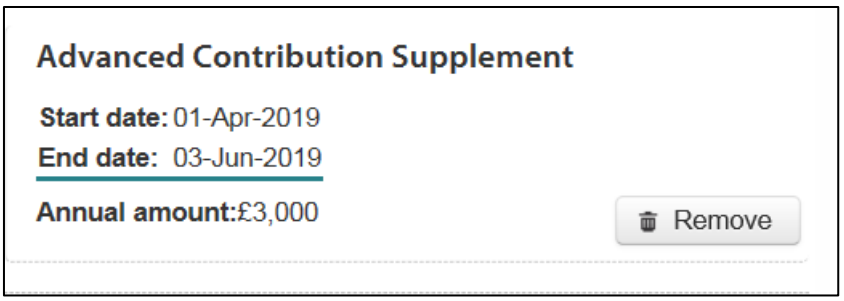

Then, enter the **Start Date** and optional **End Date** using the date pickers.



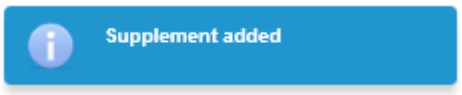
Enter the **Amount** and click on the **Add Supplement** button.




Details of the supplement will be displayed on the screen.




A confirmation pop-up message will also be displayed.




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

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

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

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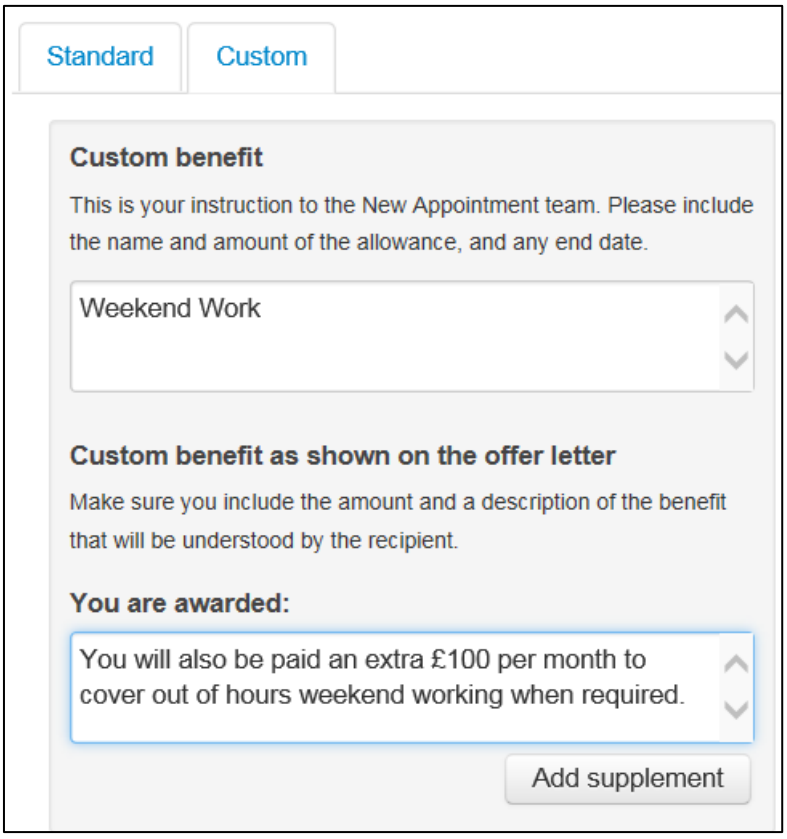
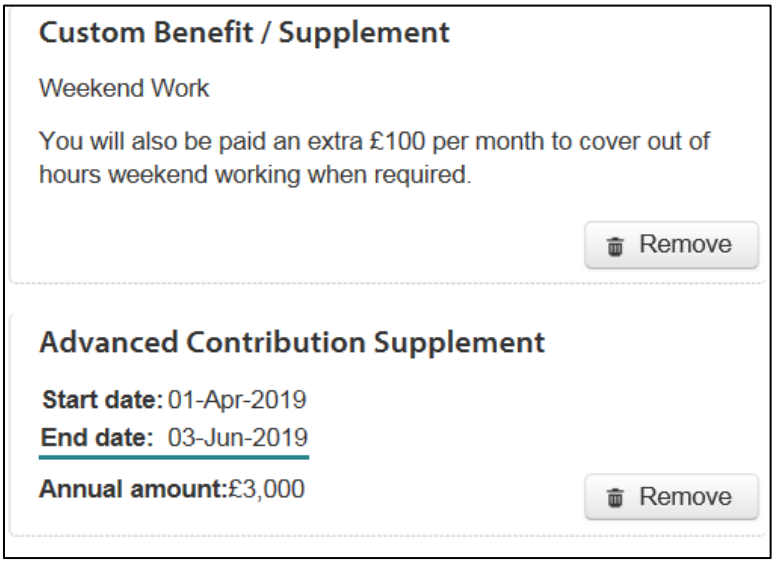
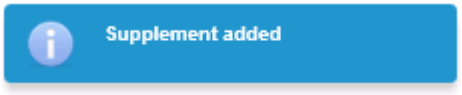



Click on the **Add Supplement** button.

Details of the supplement will be displayed on the screen.

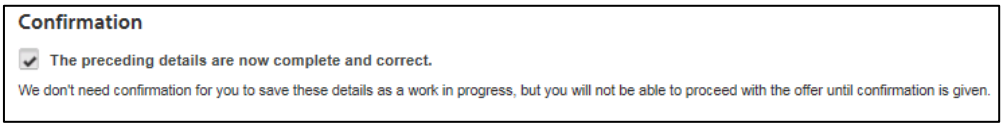



A confirmation pop-up message will also be displayed.




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

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




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

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

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

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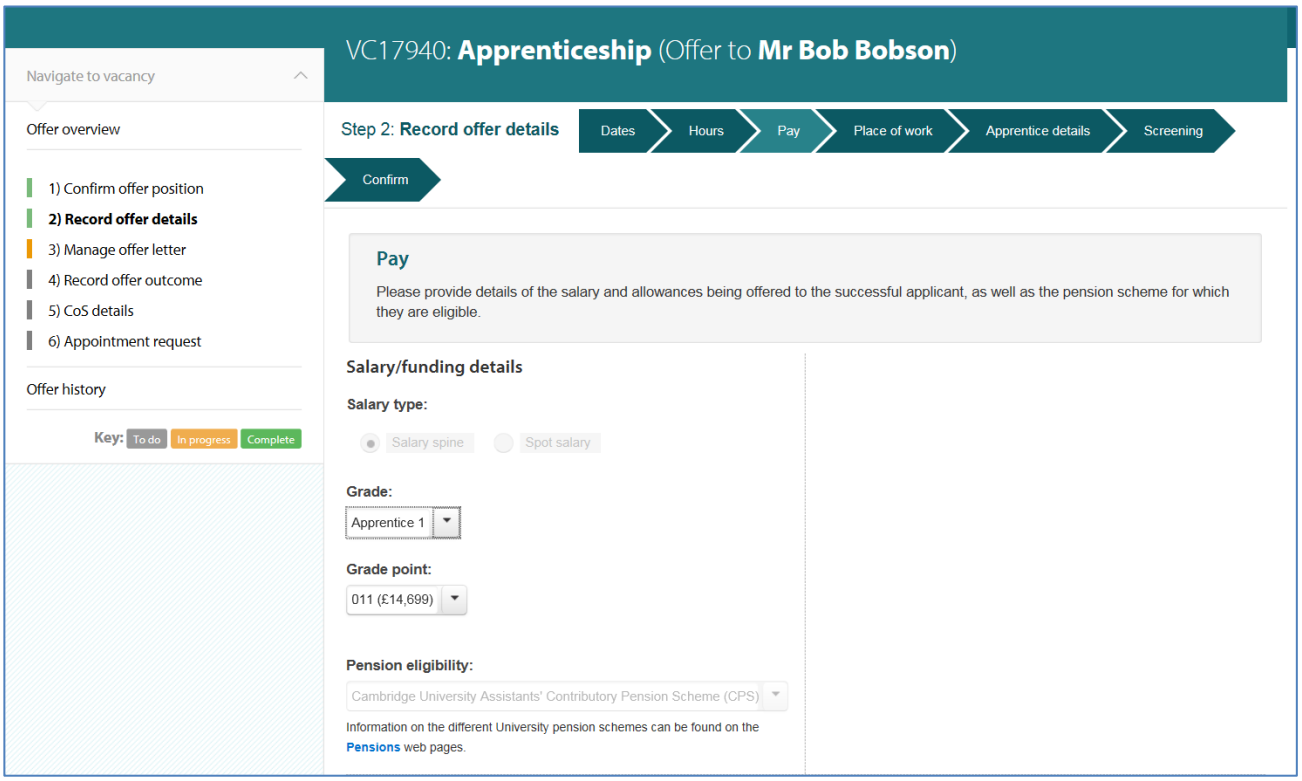
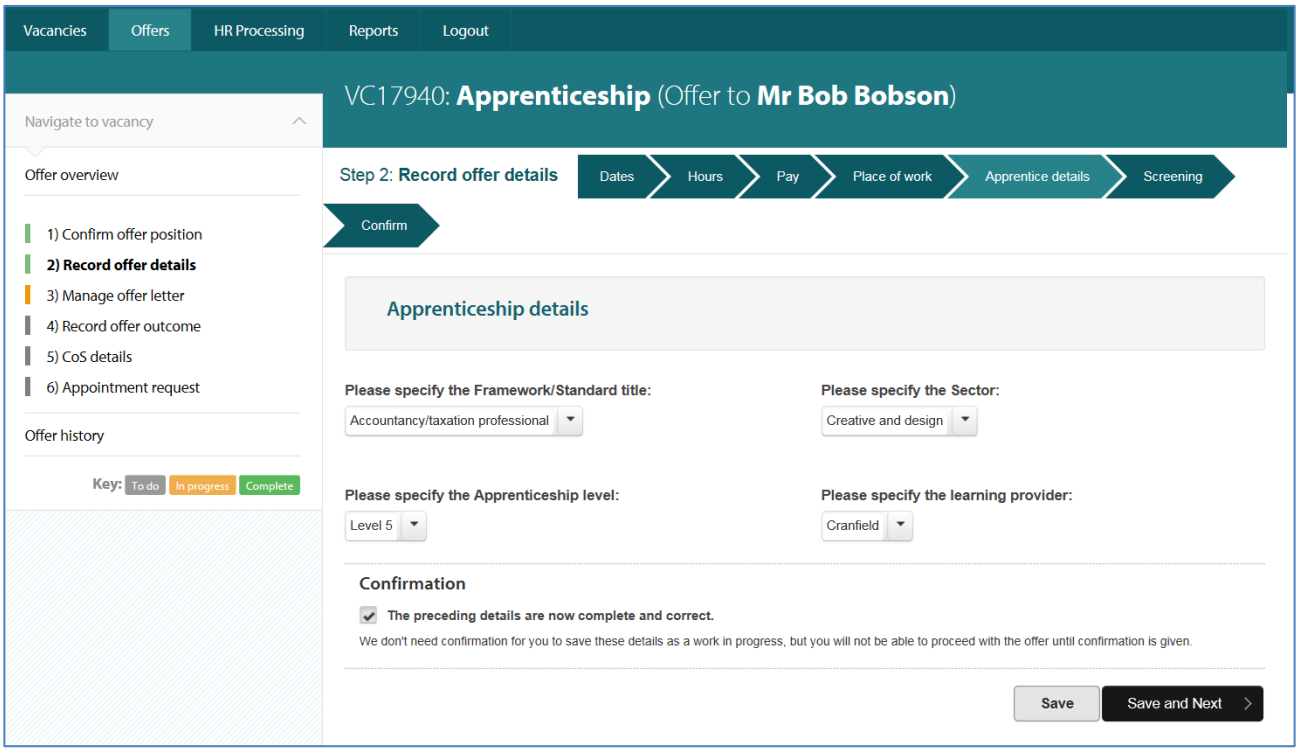
## 5.3.1 Recording Step 2 offer details information for Apprentices

Enter the Apprentice Grade and Grade point under the Pay tab




An extra tab for Apprentice details will allowing you to enter additional details.

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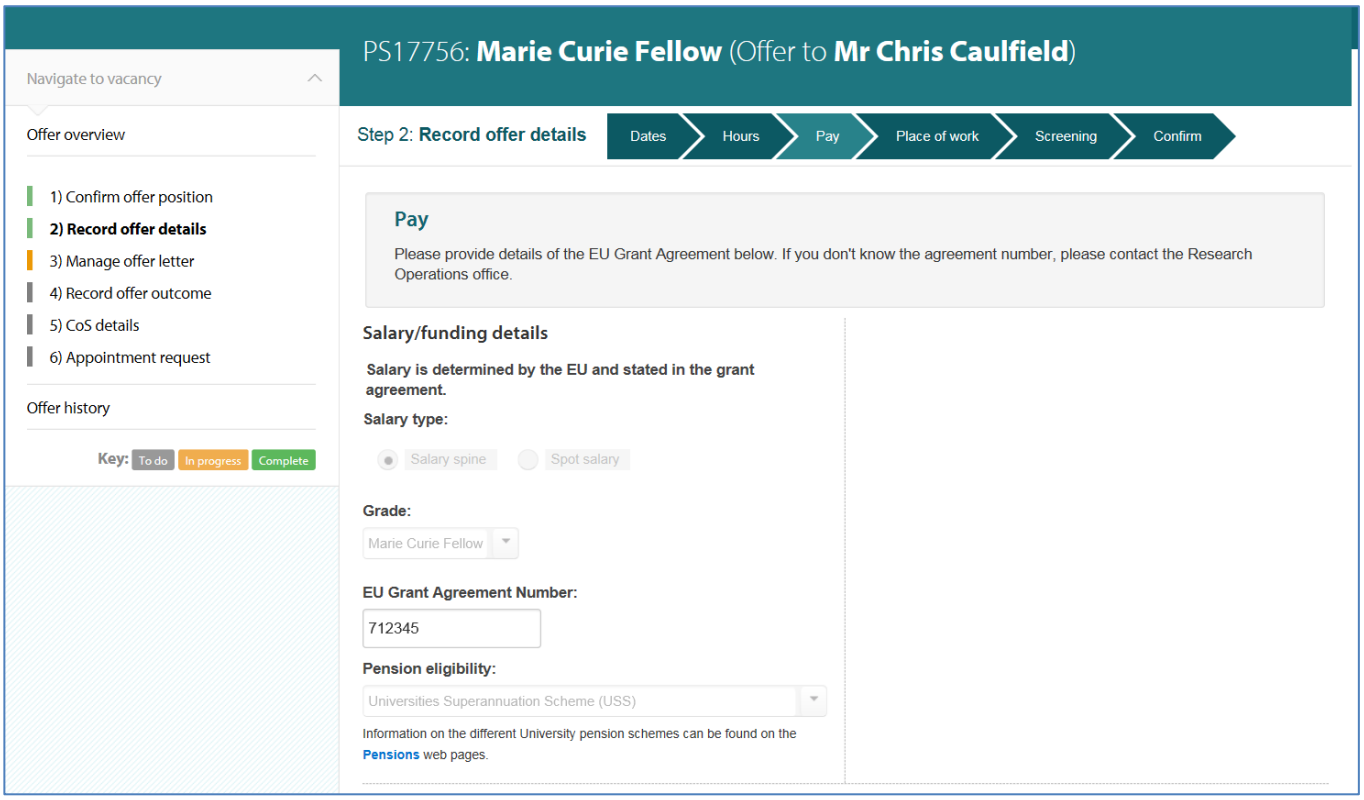
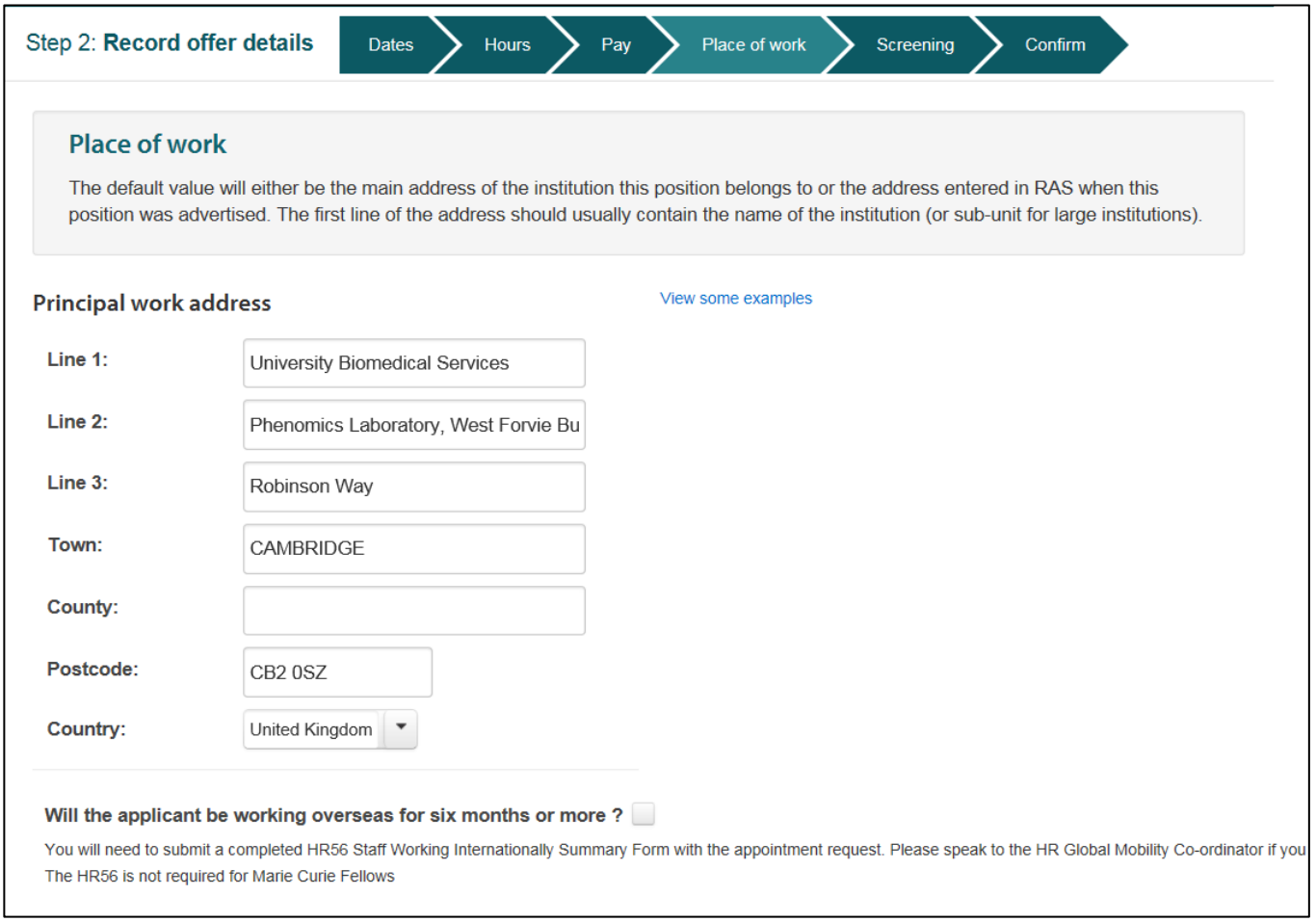
## 5.3.2 Entering Pay information for Marie Curie Fellows

You cannot provide salary information for Marie Curie Fellows, but do need to provide the EU grant agreement number.



## 5.4 Recording the principal place of work

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

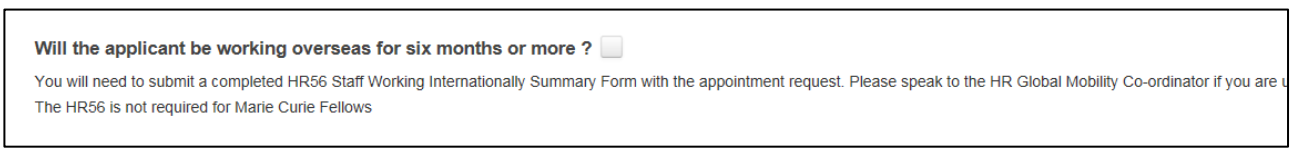



1. Overtype any of the fields that you need to change. You can also update the country using the drop down list.

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

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

2. Indicate if the applicant will be based overseas for six months or more. If they will, then you will need to attach additional supporting documents in the Appointment Request step.

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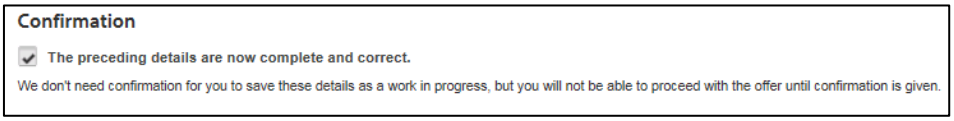
3. Once you are satisfied that the details displayed on-screen in the Place of work tab are correct, tick the check box to the left of '**The preceding details are now complete and correct'**:




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

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

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

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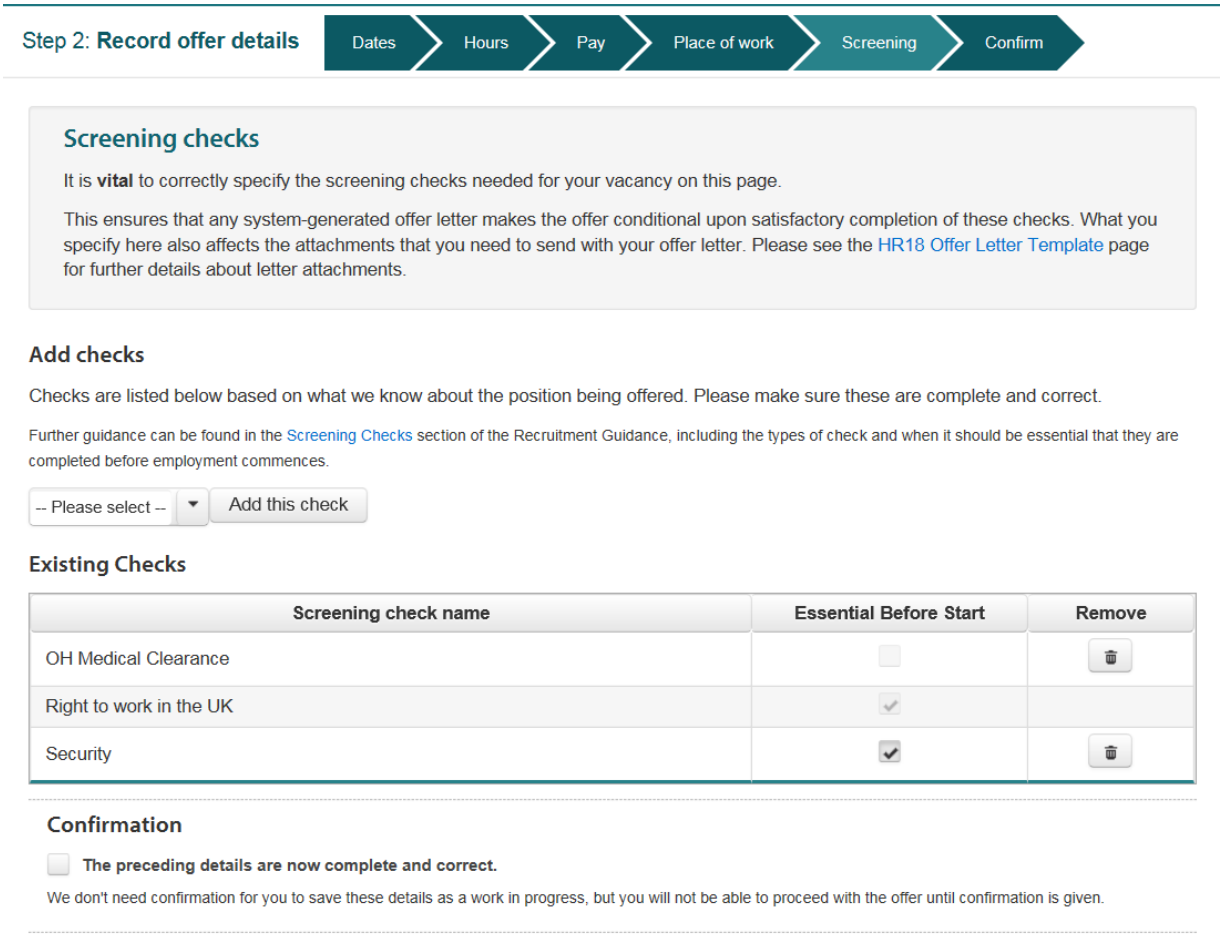
## 5.5 Entering/confirming screening checks

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




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

| Check | Paragraph used in offer letter |
|---|---|
| All types | This offer is conditional upon: [wording that follows is dependent on the check type(s) required] |
| Basic disclosure (criminal records check). | The satisfactory outcome of a basic disclosure (criminal records check). Whether an outcome is satisfactory will be determined by the University. |
| DBS – enhanced only | The satisfactory outcome of an enhanced Disclosure and Barring Service check. Whether an outcome is satisfactory will be determined by the University. |
| DBS – enhanced with adults' barred list | The satisfactory outcome of a Disclosure and Barring Service check (enhanced with adults' barred list). Whether an outcome is satisfactory will be determined by the University. |
| DBS - enhanced with children's barred list | The satisfactory outcome of a Disclosure and Barring Service check (enhanced with children's barred list). Whether an outcome is satisfactory will be determined by the University. |

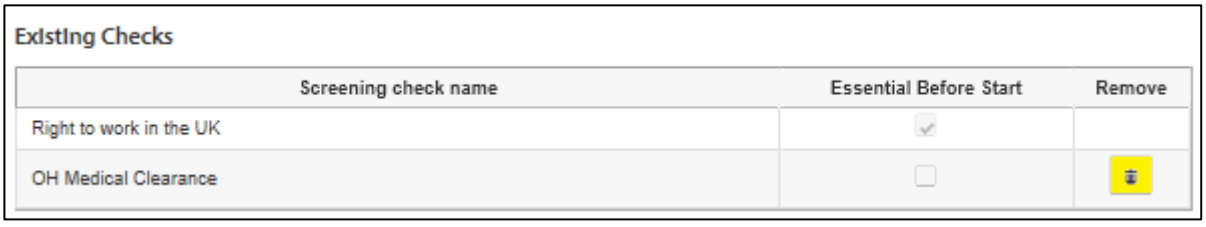
| Check | Paragraph used in offer letter |
|---|---|
| DBS - enhanced with children and adults' barred lists) | The satisfactory outcome of a Disclosure and Barring Service check (enhanced with children and adults' barred lists). Whether an outcome is satisfactory will be determined by the University. |
| DBS - standard | The satisfactory outcome of a standard Disclosure and Barring Service check. Whether an outcome is satisfactory will be determined by the University. |
| Honorary Clinical Contract | You acquiring an Honorary Clinical Contract. |
| NMC Registration | [None] |
| OH Medical Clearance (also known as a Health Assessment) | [None – offers are never conditional upon a health assessment] |
| Security check | The satisfactory outcome of a security screening check. Whether an outcome is satisfactory will be determined by the University. |
| Research Passport (any type) | You acquiring a Research Passport. |

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

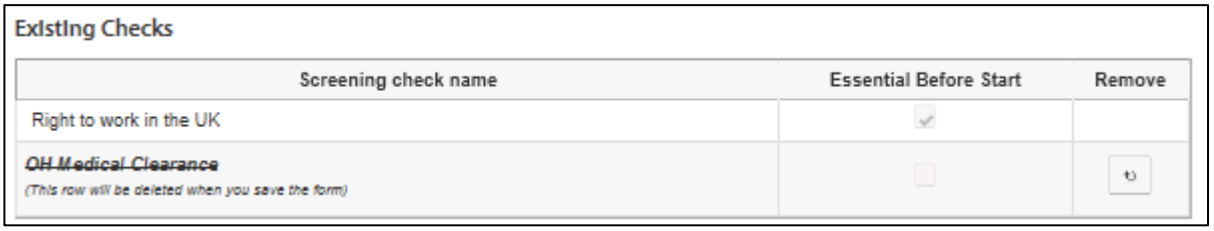
Please note that OH Medical Clearance/Health Assessment only applies to a limited number of roles, as explained in the Health Assessment pages in the Screening checks section of the Recruitment Guidance. This is not the same as the OHF30 Work Health Declaration, which is a health questionnaire that must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

If you are not familiar with the University's requirements for screening checks, or you have any uncertainty about the checks needed for a particular position, please review the Screening checks section of the Recruitment Guidance. If you need any further assistance, please contact the Compliance Team (complianceteam@admin.cam.ac.uk).

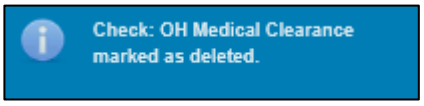
1. If any of the required screening checks listed in the table are incorrect then click the **Remove** button (this is a rubbish bin icon, shown in yellow below) next to the check in question.



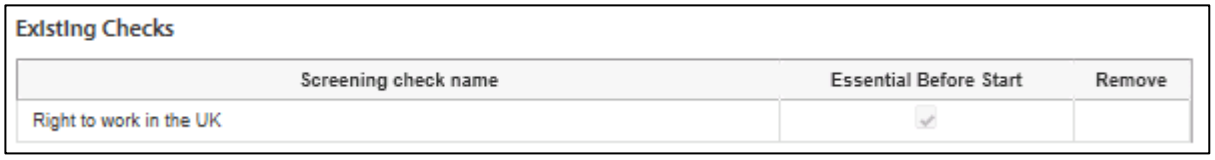

This check will then be struck through.



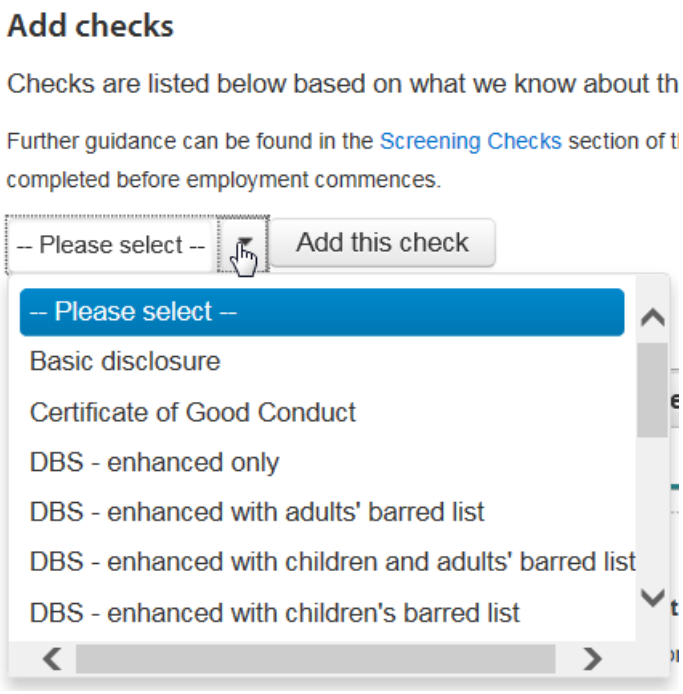
A pop-up confirmation message will also be displayed.




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

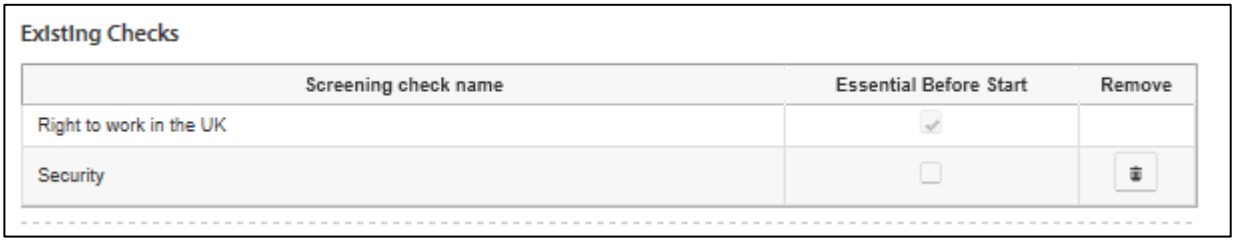



2. To add a new check requirement, select the type you need from the drop-down list and then click on **Add this check**.




3. The selected check will appear on the screen.

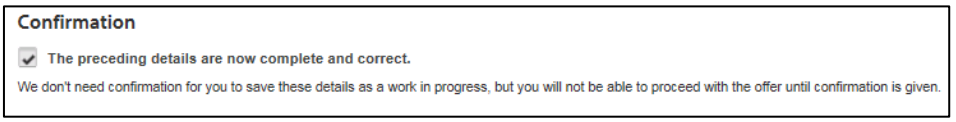
   If it is essential that the check is completed before the successful applicant starts work in the position, the check must be marked as **Essential before start** by ticking the check box in the relevant column in the table.



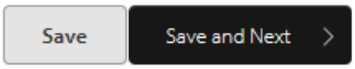

Please see the Identify screening checks section of the Recruitment Guidance if you are not sure if a check should be treated as **Essential Before Start**.

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

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




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




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

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

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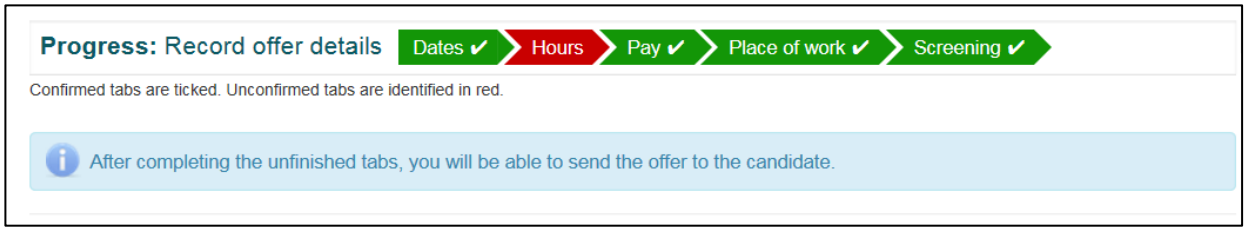
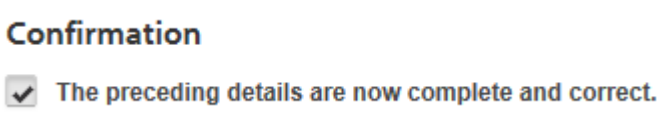
## 5.6 Confirming offer details

The final step in the **Record offer details** process is the **Confirm** tab. This requires you to confirm the details you have entered in the other tabs before proceeding, helping you to ensure that the details in any system-generated offer letter you create (and the Appointment Request you send later in the process) are accurate and complete.

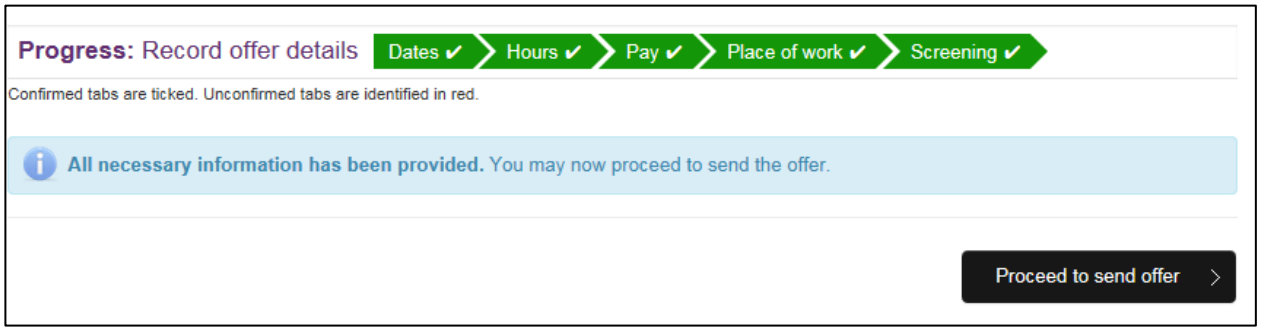
1. If any of the tabs on the progress bar on the **Confirm** screen are shown in red, you will need to go back to the relevant tab and complete the missing details.




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




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




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

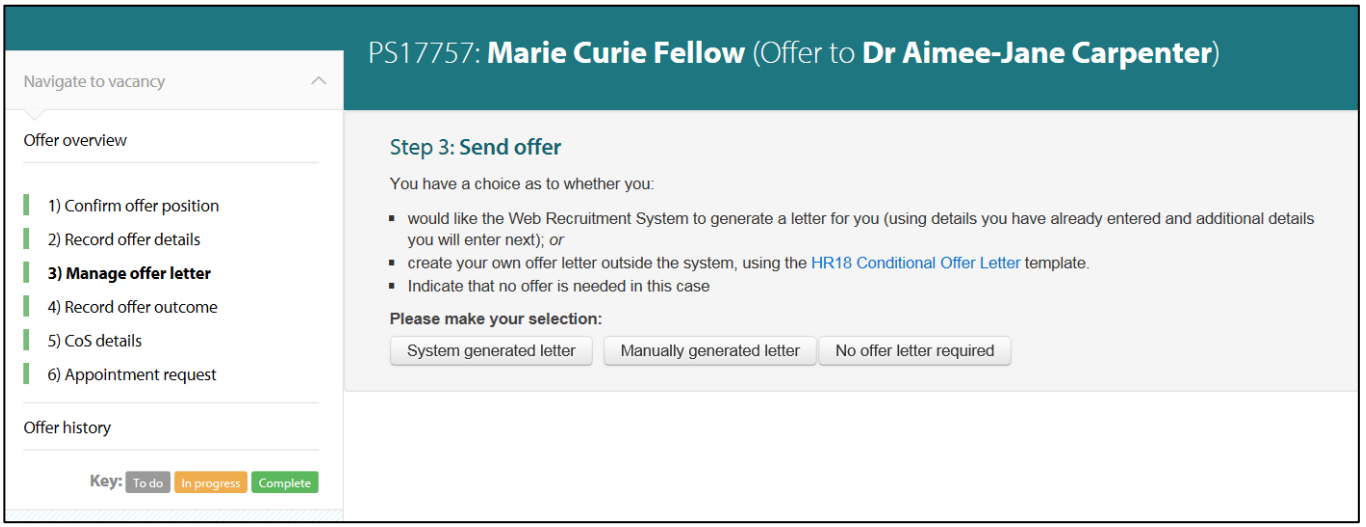
# 6 Step Three - Manage Offer Letter

## 6.1 Choosing the type of offer letter

Your first task in **Manage offer letter** is to select whether you will be creating a system-generated offer letter or writing your own offer letter manually (i.e. outside the system using the HR18 Conditional Offer Letter template). Where appropriate, you have the option to choose 'No offer letter required'. This option is intended only for very rare situations where issuing an offer letter may not be appropriate – for example, in limited circumstances, research fellows named on grants.

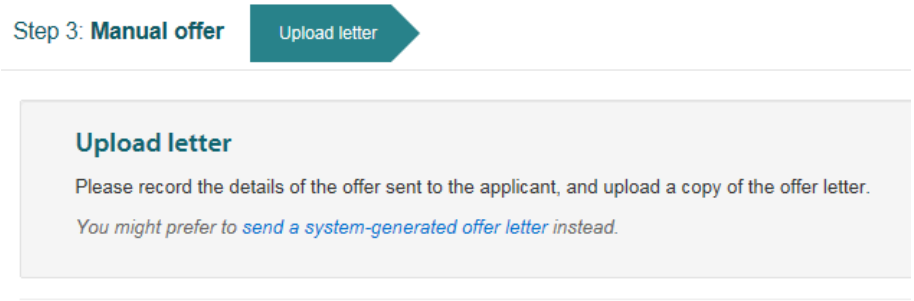
If you choose this option then the Record Offer Outcome is skipped.

Click on the relevant button to indicate your chosen option.




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

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




If you have chosen a system-generated offer letter please refer to section 6.2 immediately below.

If you have chosen to construct the letter manually please see section 6.3 below.

## 6.2 Creating a system-generated letter

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

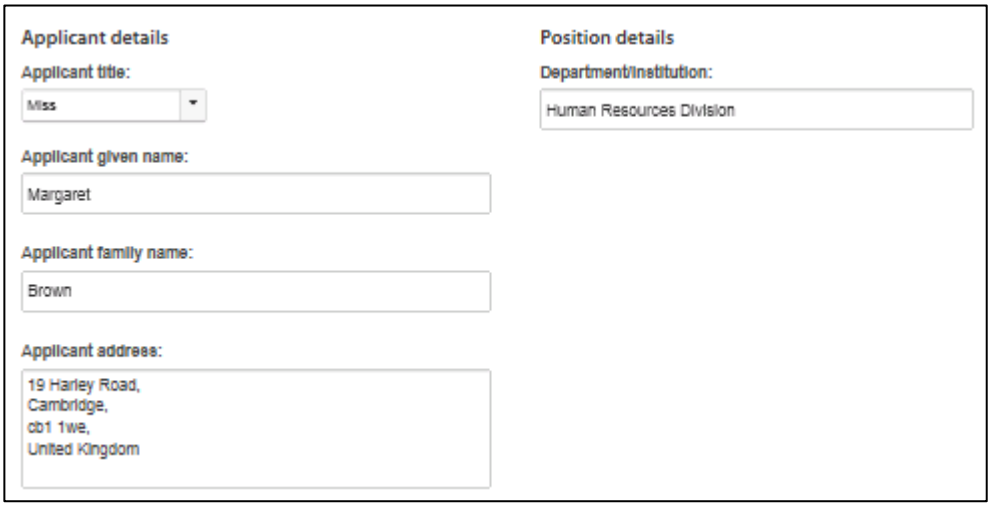
Additional information is needed regarding:

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

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

### 6.2.1 Entering applicant and position details

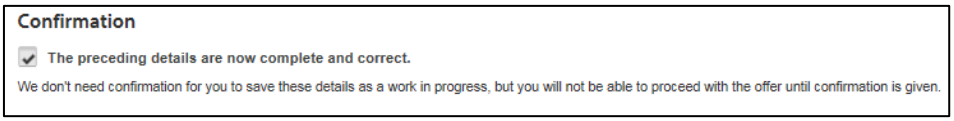
If you chose to create a system-generated letter you will automatically be directed to the first tab in the **Manage offer letter** process, which is **Applicant & position**.




1. The applicant's name and address will be displayed, reflecting the details that the applicant entered into their online application form. Please review these details and edit if required (for example, if the successful applicant has informed you that they have moved house since their applied for the position).

2. The **Department/Institution** reflects the details held in CHRIS. Please edit if required.

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




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

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

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

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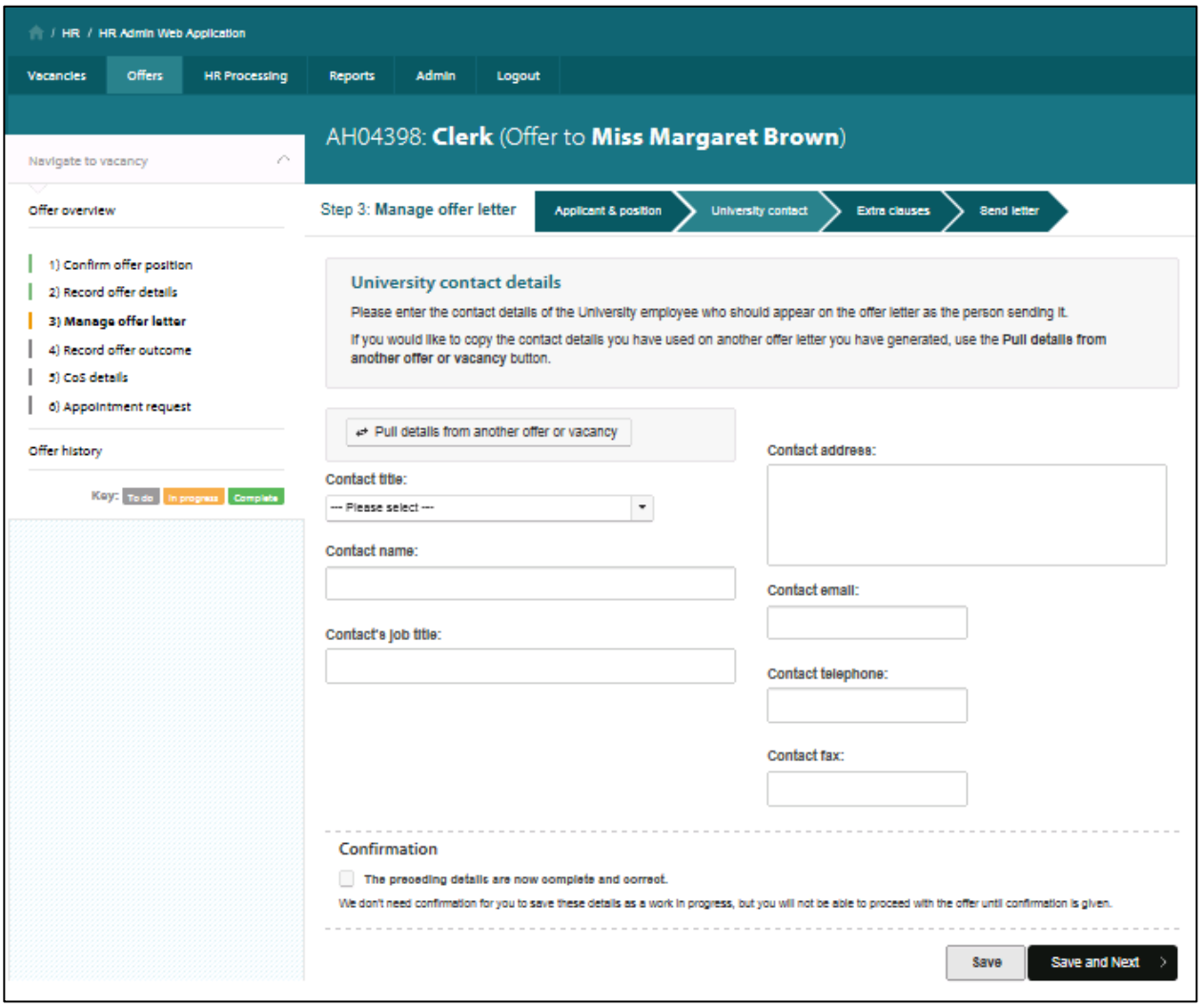
## 6.2.2 Entering University contact details

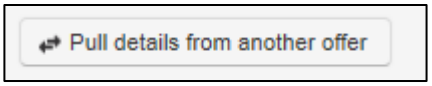
The next tab in the **Manage offer letter** process allows you to enter the **University contact** details that will appear in the sender's name and address sections of the offer letter.




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

1. If you wish to copy details from within the system:

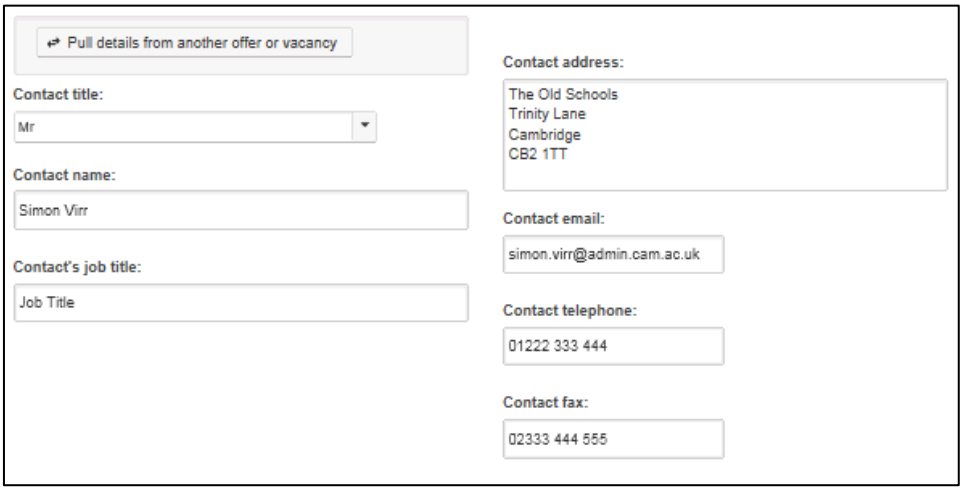
   a) Click on the **Pull details from another offer or vacancy** button.



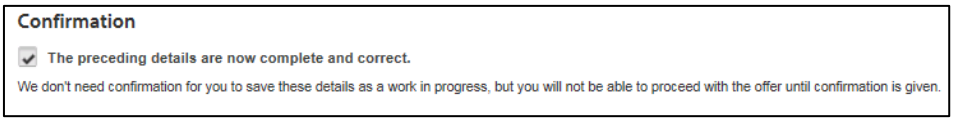

   The following options will be displayed:

b) Select whether to retrieve previous details from an offer or a vacancy, and select the contact details to be copied from the choices in the drop down list.

c) Click on the **Copy Details to Offer** button. The selected details will then be copied into the University contact details screen for you to review and update as required.




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




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

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

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

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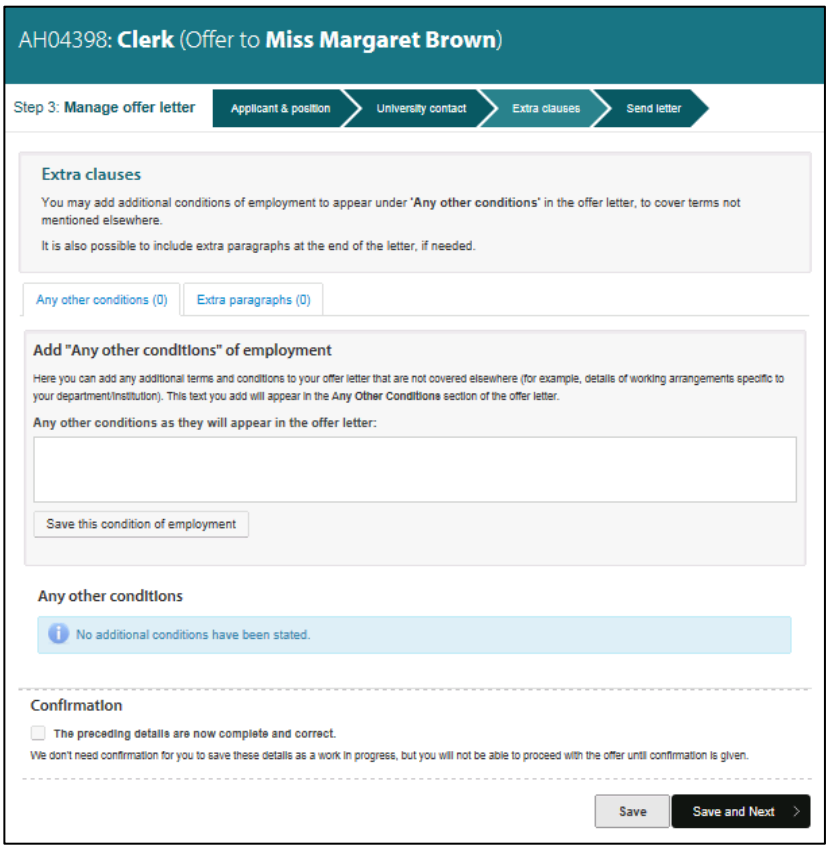
### 6.2.3 Entering extra clauses

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

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




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

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

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

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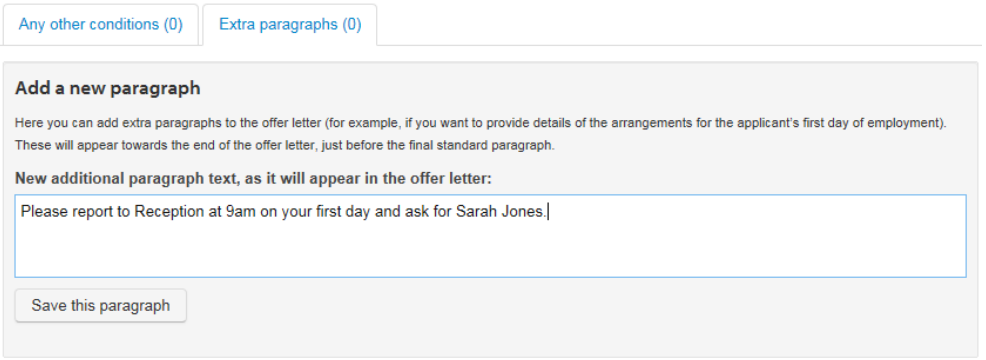
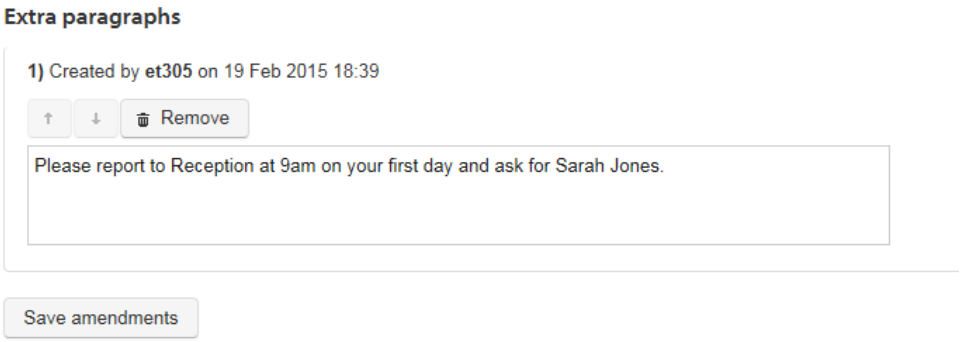
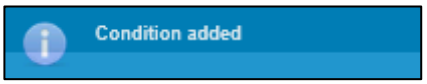



The condition or paragraph entered will be displayed on the screen:




A pop up confirmation message will also be displayed.




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

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

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

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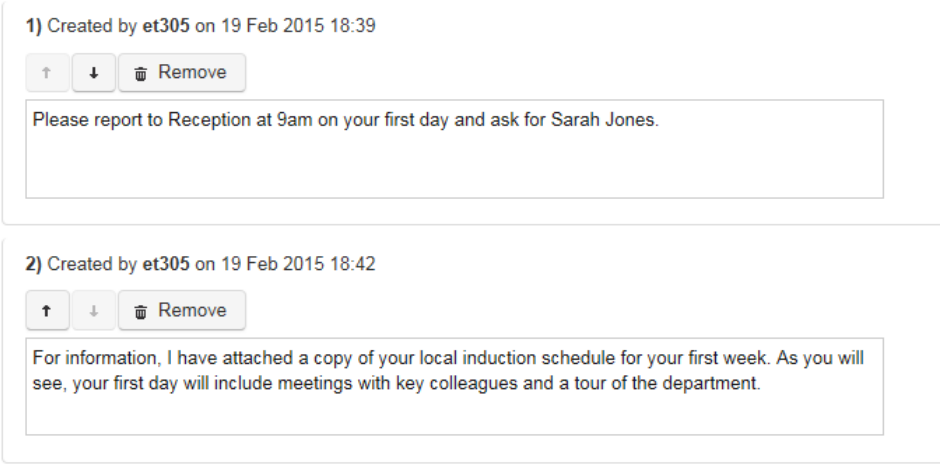
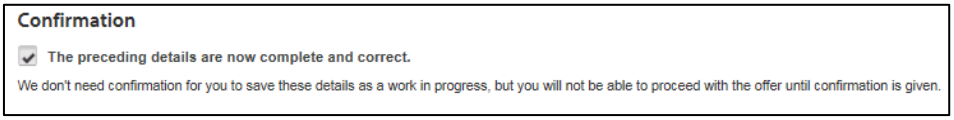
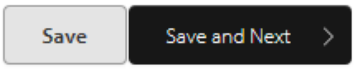



2. Once you are satisfied that the details displayed on-screen on both pages of the Extra clauses tab are complete and correct, tick the check box to the left of '**The preceding details are now complete and correct'**:




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




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

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

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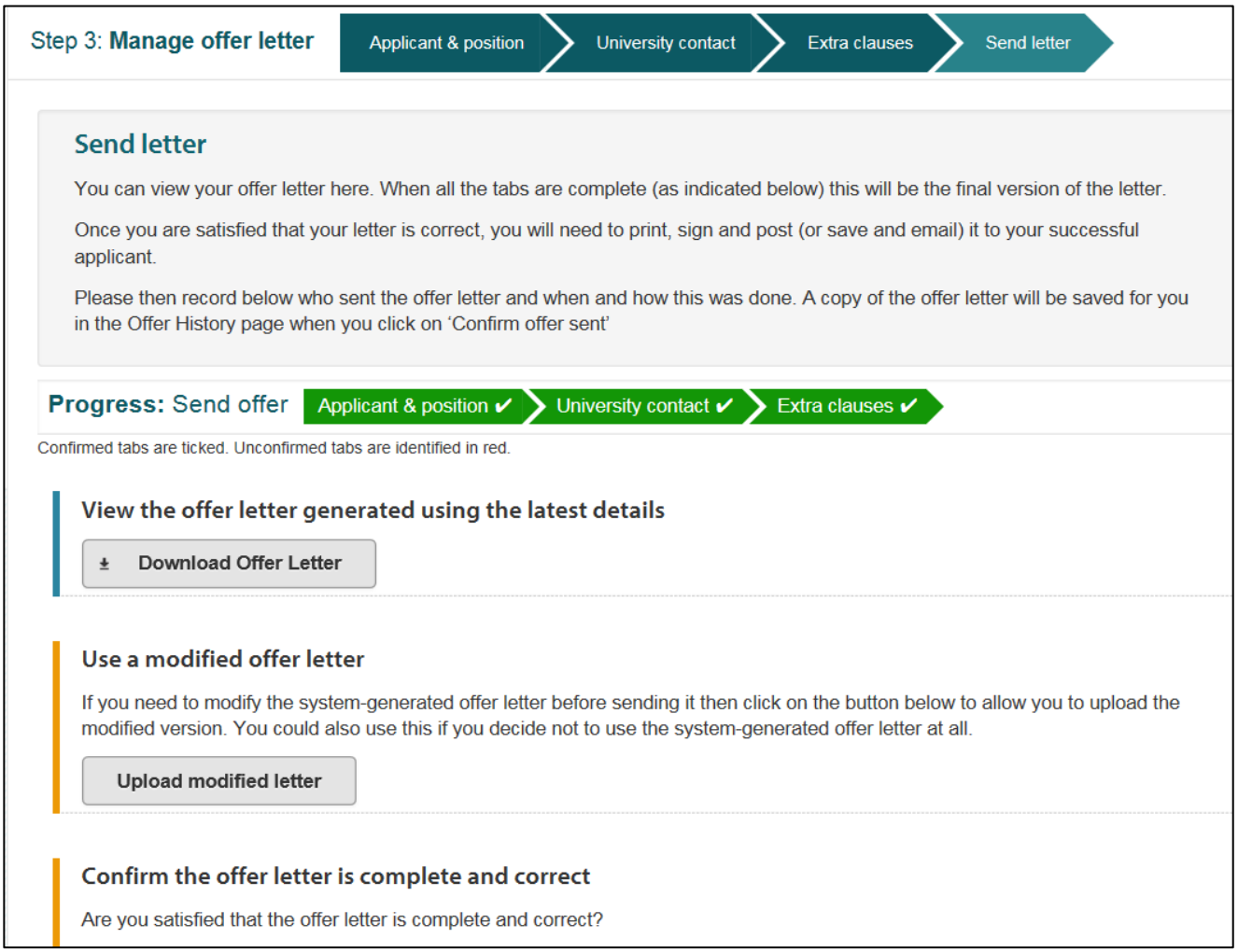
### 6.2.4 Sending the system-generated offer letter

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




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

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

A PDF of the offer letter will open.

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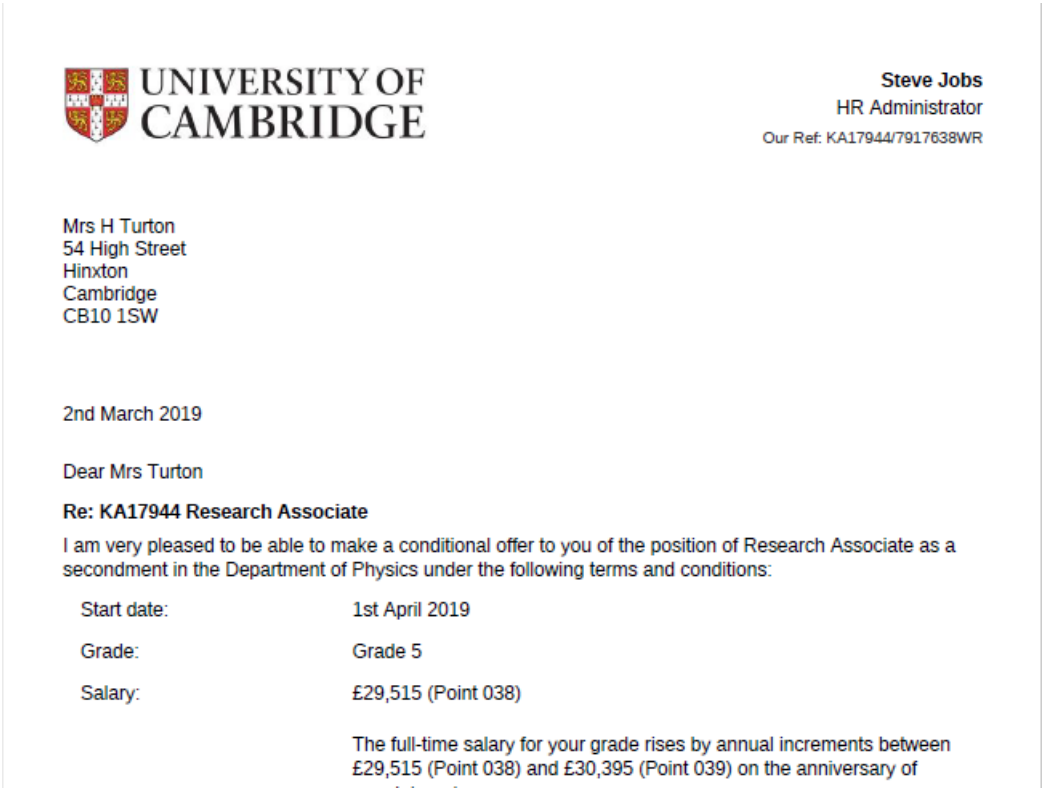

UNIVERSITY OF CAMBRIDGE

**Steve Jobs**
HR Administrator
Our Ref: KA17944/7917638WR

Mrs H Turton
54 High Street
Hinxton
Cambridge
CB10 1SW

2nd March 2019

Dear Mrs Turton

**Re: KA17944 Research Associate**

I am very pleased to be able to make a conditional offer to you of the position of Research Associate as a secondment in the Department of Physics under the following terms and conditions:

| | |
|---|---|
| Start date: | 1st April 2019 |
| Grade: | Grade 5 |
| Salary: | £29,515 (Point 038) |
| | The full-time salary for your grade rises by annual increments between £29,515 (Point 038) and £30,395 (Point 039) on the anniversary of |

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

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

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

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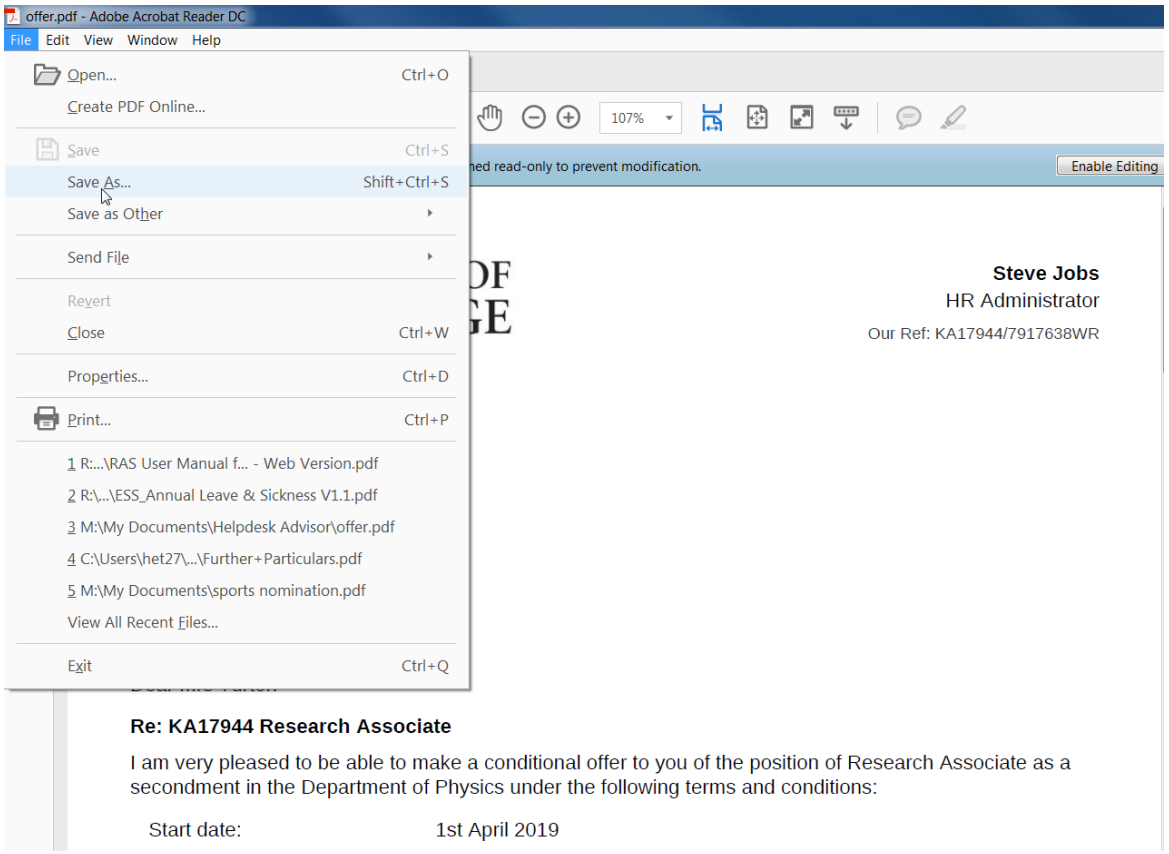
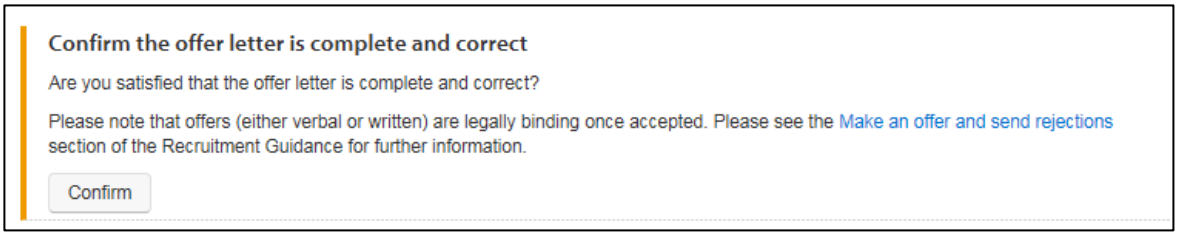



4. Click on the **Confirm** button to verify that the offer letter is complete and correct.




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

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

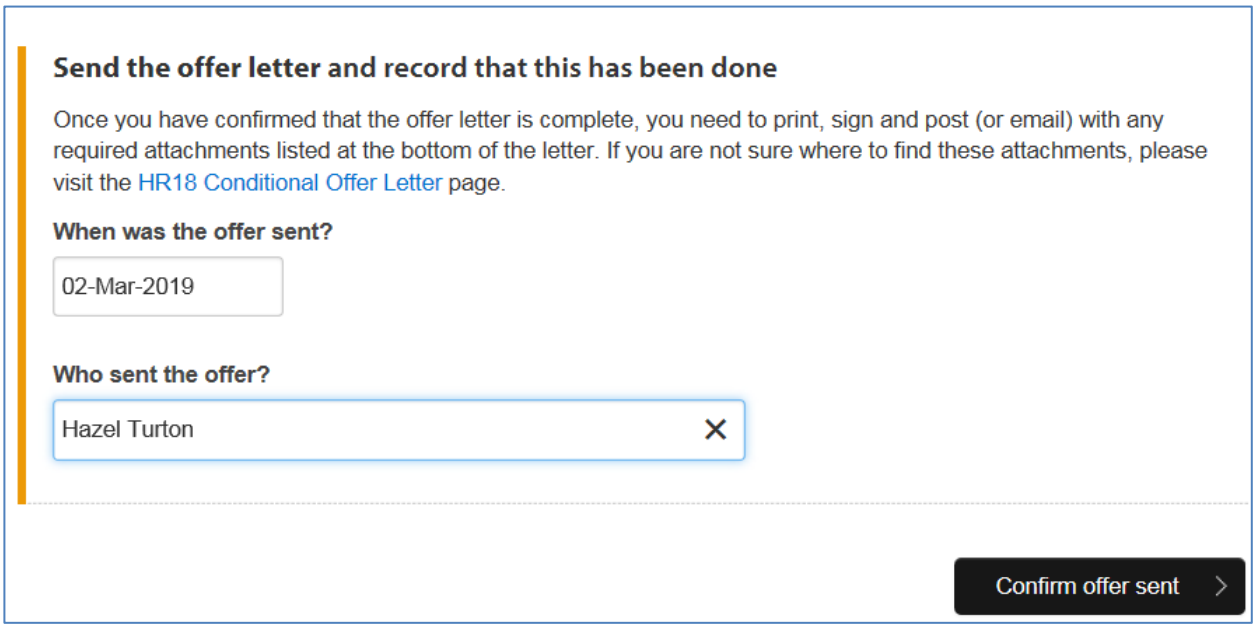
**Please note: you must remember to send the required enclosures with the offer letter (listed at the end of the letter).** For example the OHF30 Work Health declaration.

Enclosure(s):

- OHF30 Work Health declaration

You can find links to all possible enclosures, or information on where to obtain them, on the HR18 Conditional Offer Letter home page.

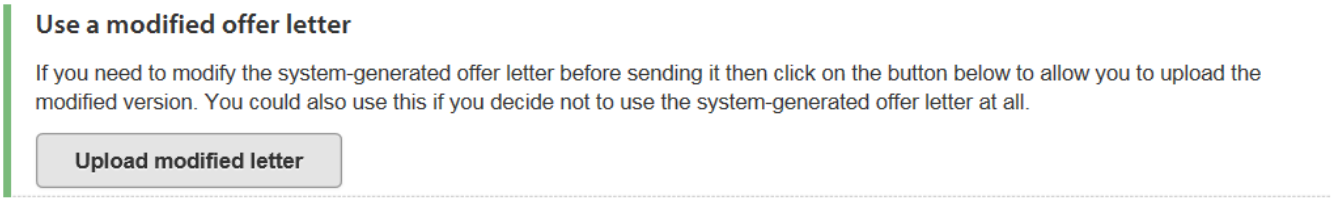
6. Once the offer letter has been sent by post or email, enter the date that this was done and who sent the letter so that there is an audit trail within the system. Click on **Confirm offer sent**.



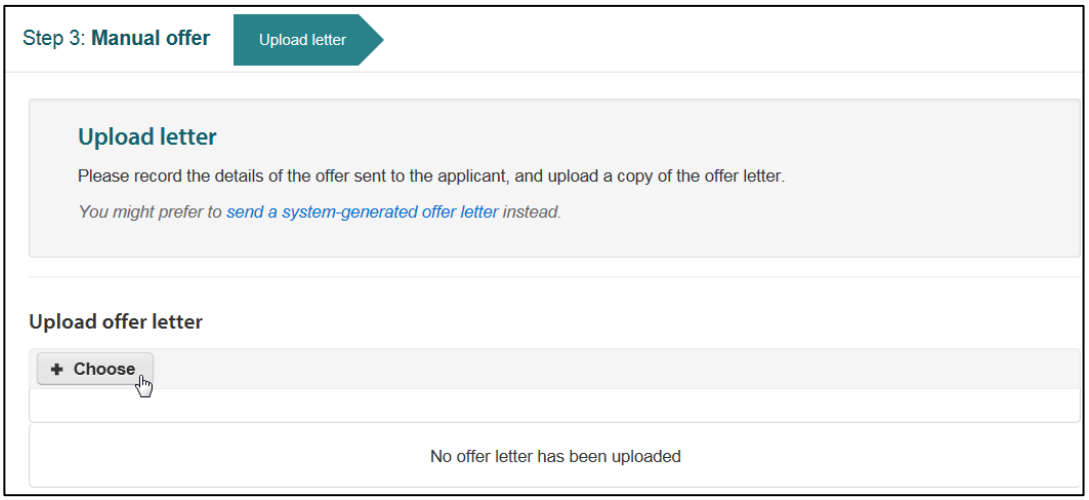

A pop up confirmation message will confirm that the details were recorded and a copy of the letter will be added to the offer letter history:

### 6.2.4 Sending a modified or manual offer letter

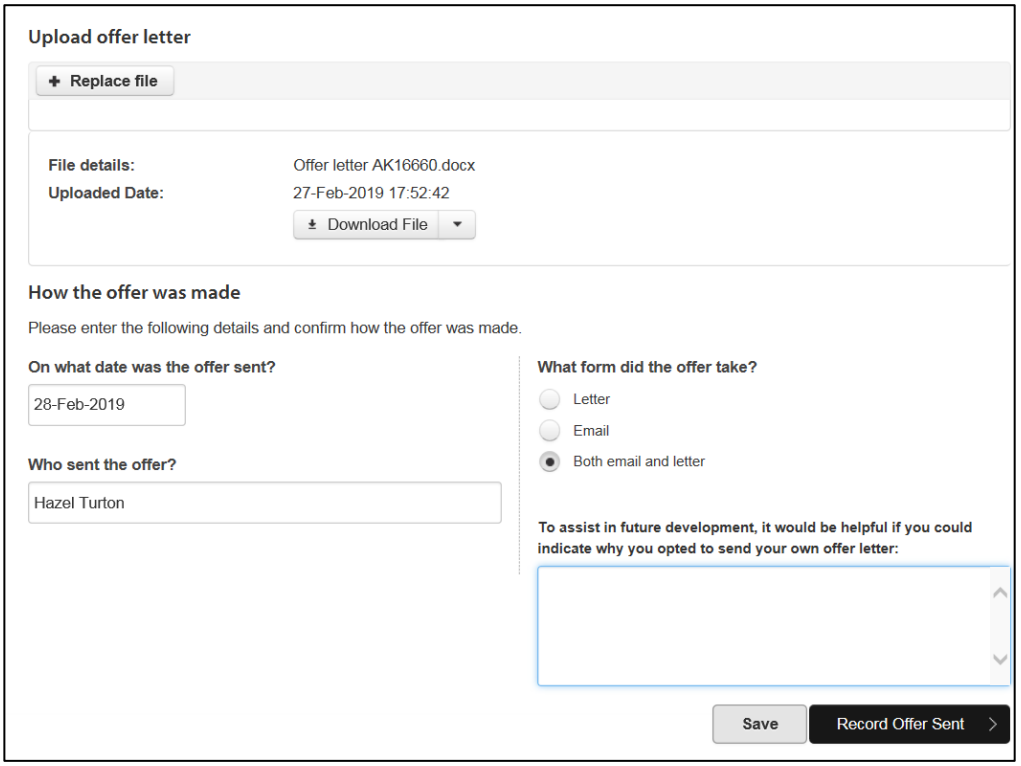
If you need to modify the system generated offer letter before sending it, or if you decide to produce your own offer letter after all, select the Upload modified letter option.



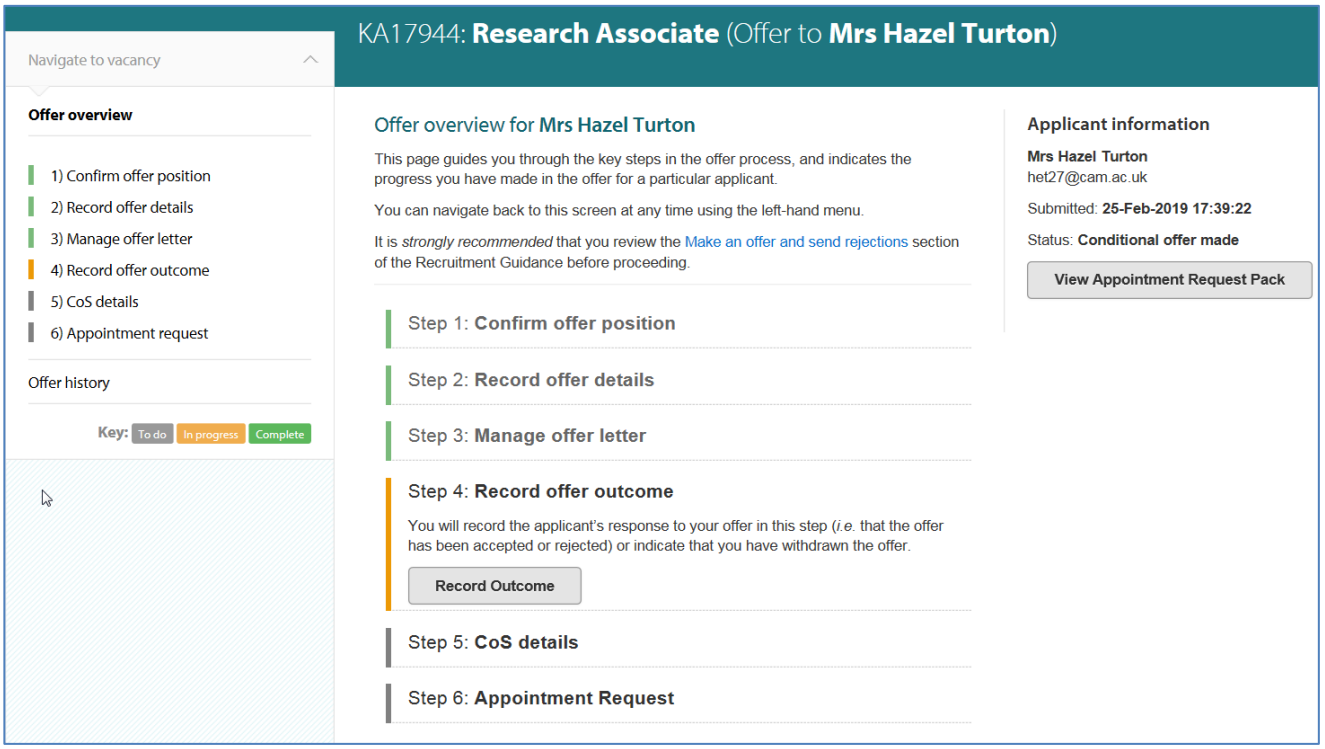

The following screen will be displayed. Click on the Choose button to select the file.



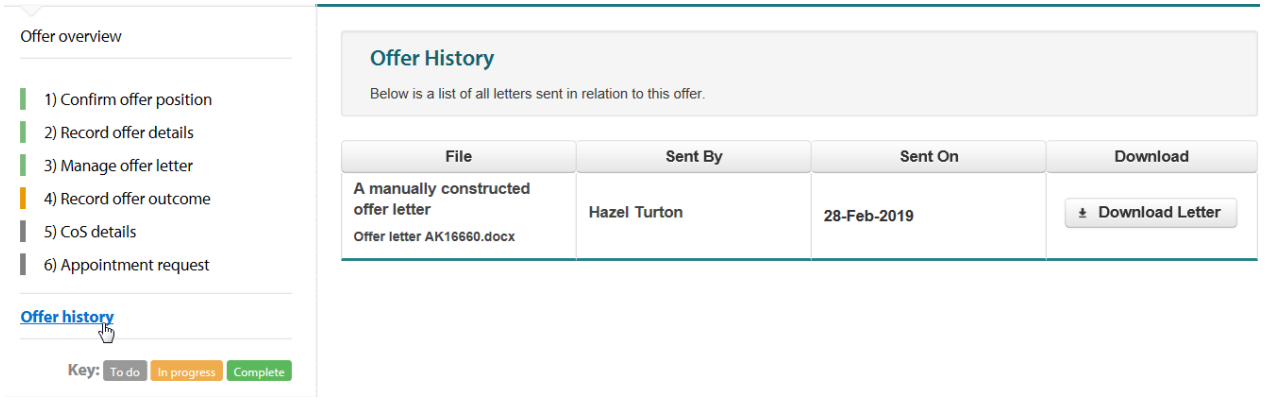

Click on the Choose button and complete details of when the offer letter was sent and who sent it, and click on Record Offer Sent.




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



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




See the section on Viewing Offer History for more details

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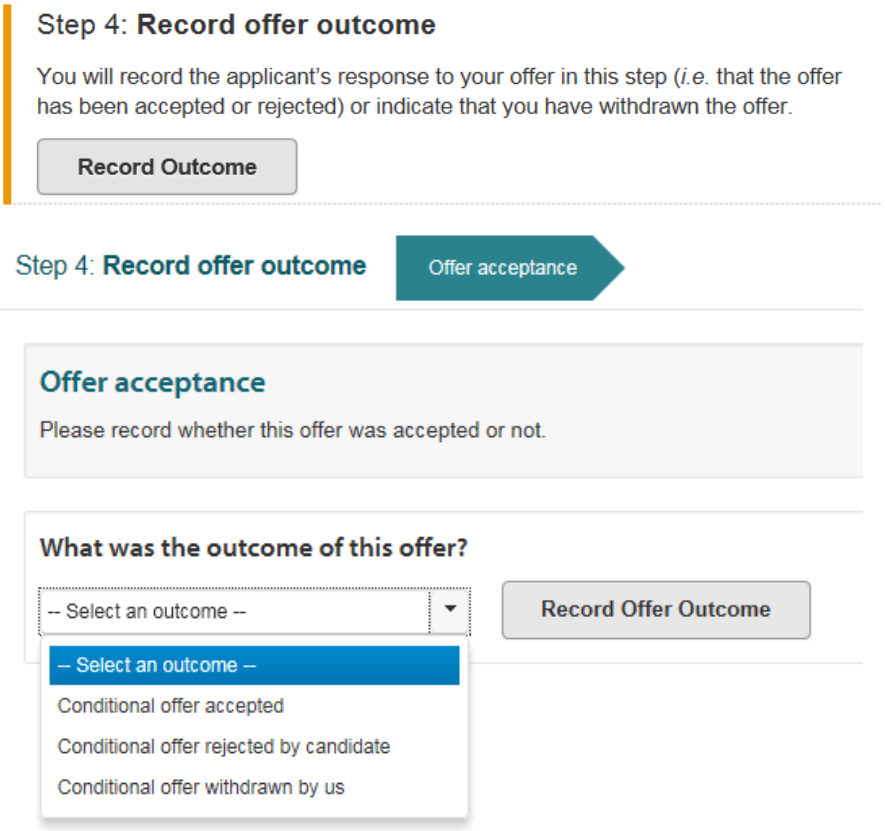
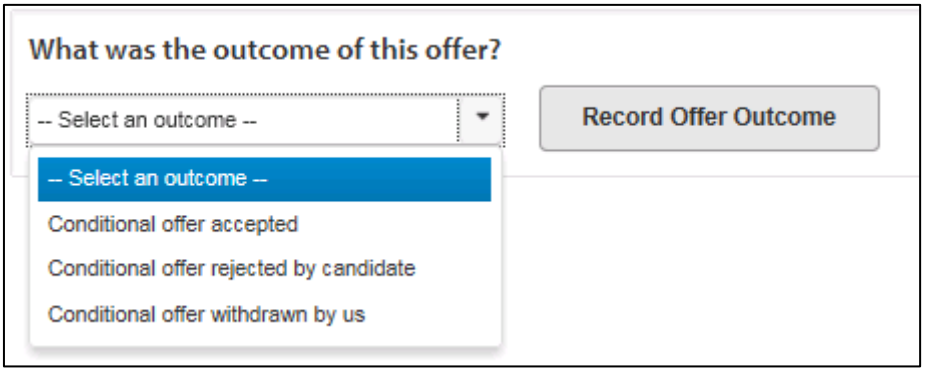
# 7. Step Four - Recording the Outcome of the Offer

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




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




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

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

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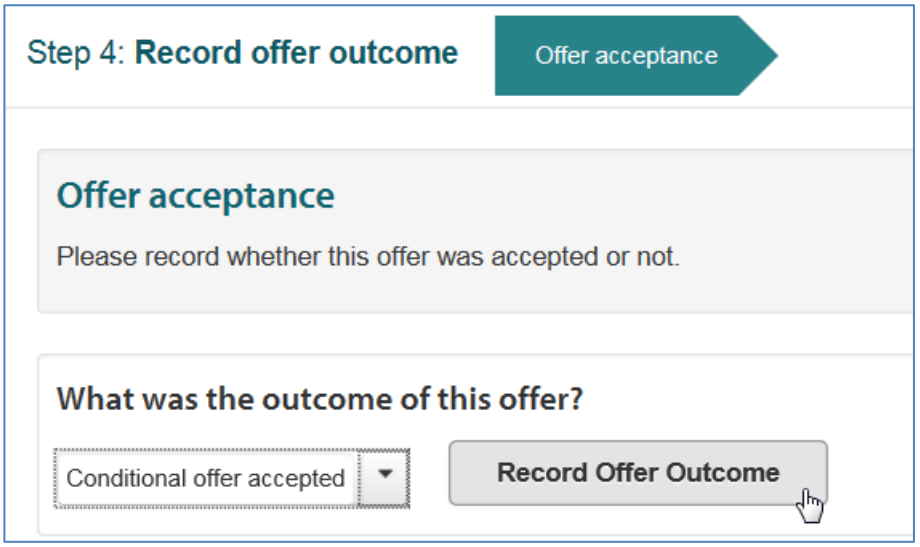
You do not need to produce a new offer letter for a change in start date unless you have specific reasons for doing so (for example, the successful applicant requests a letter reflecting the change).

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

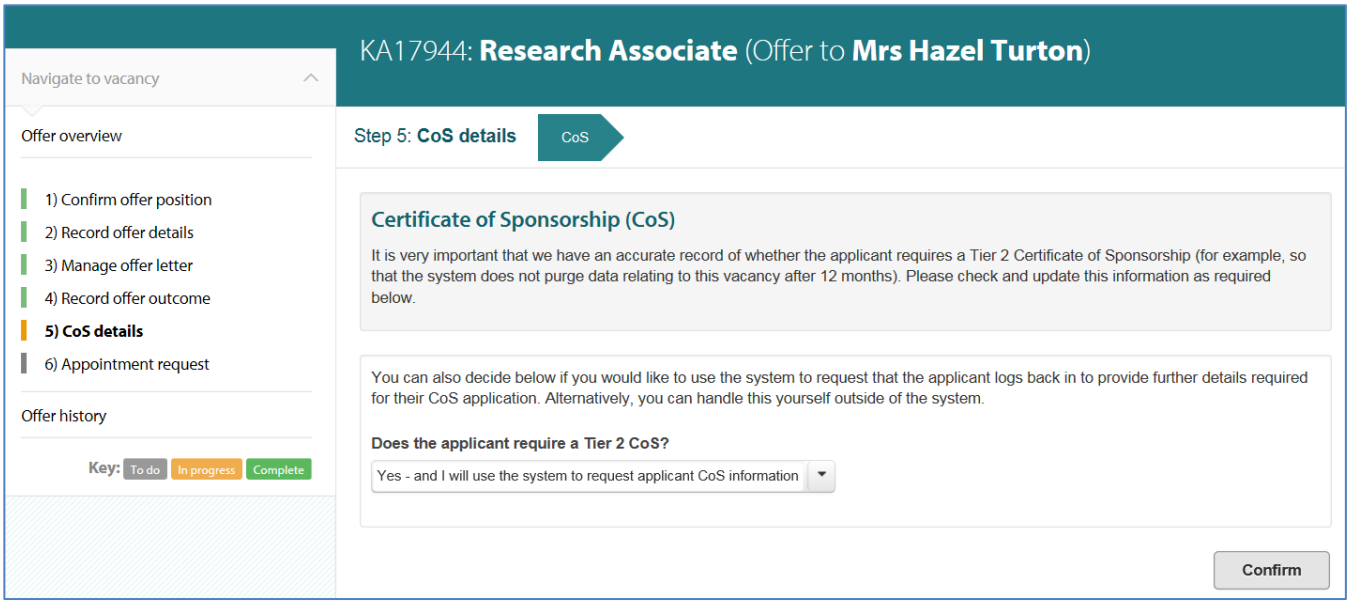
3. In most cases, it is expected that you will record a response of **Conditional offer accepted.**



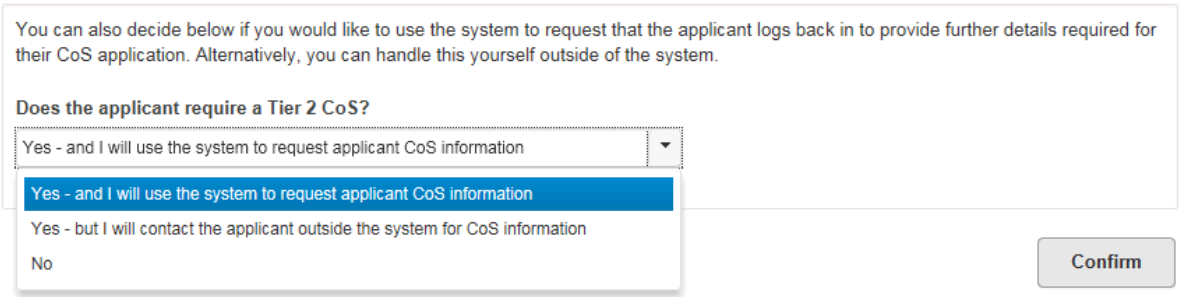

Once you have done so, you will be routed to Step 5 of the offers process, where you will be asked to confirm and record the CoS details.

# 8. Step Five - Confirming the CoS Details

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




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




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

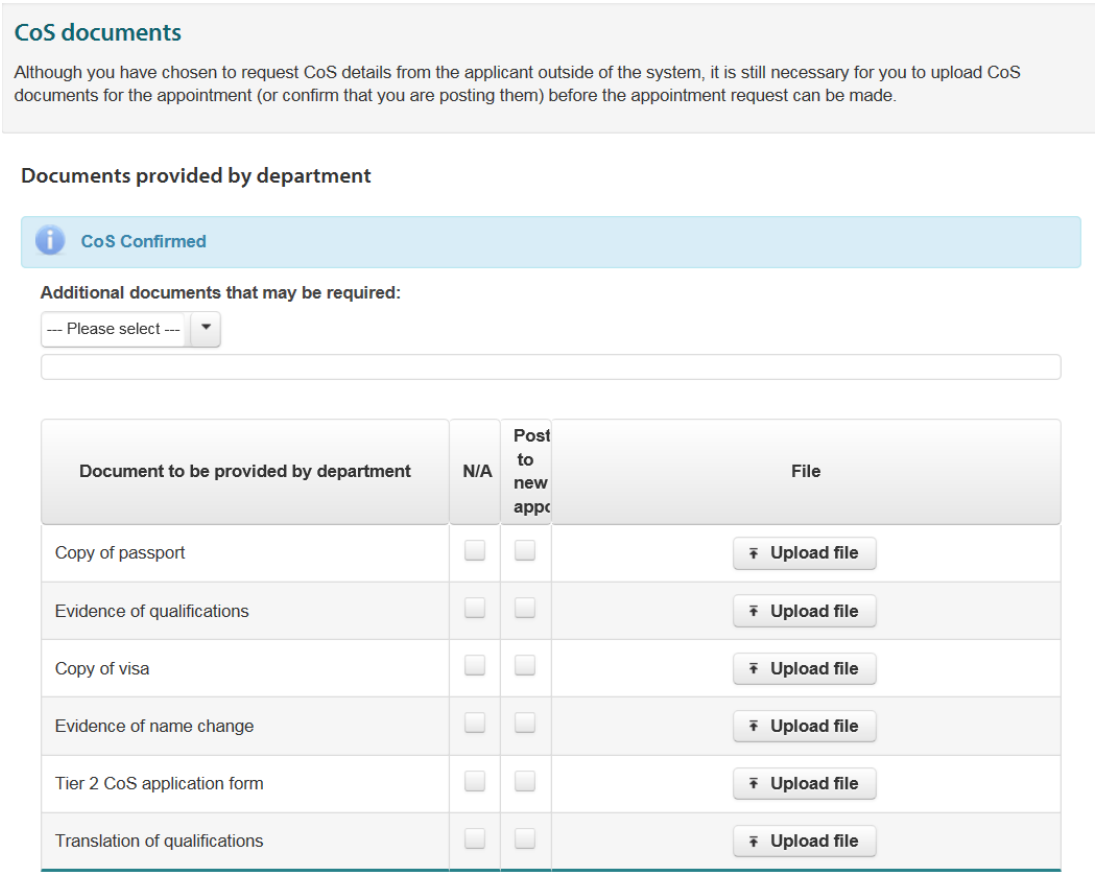
- You will be emailing them via the system to request that they log back in to their account to provide the information and supporting documents required for their CoS application; or
- You will contact the applicant outside of the system for the details and documents that you require for their CoS application.

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

2.

a) If the response to the question was **No** then you will be directed to the next tab in the offer process, which will allow you to submit an online Appointment Request to the New Appointment Team.

b) If the response to the CoS question was either of the **Yes** options, you will need to complete additional information related to the CoS.




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

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

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

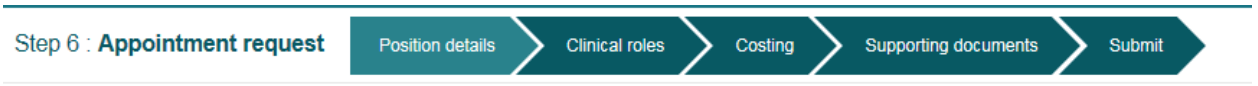
# 9. Step Six - Appointment Request

The next and final step in the offer process enables you to make an online Appointment Request to the New Appointment Team.

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

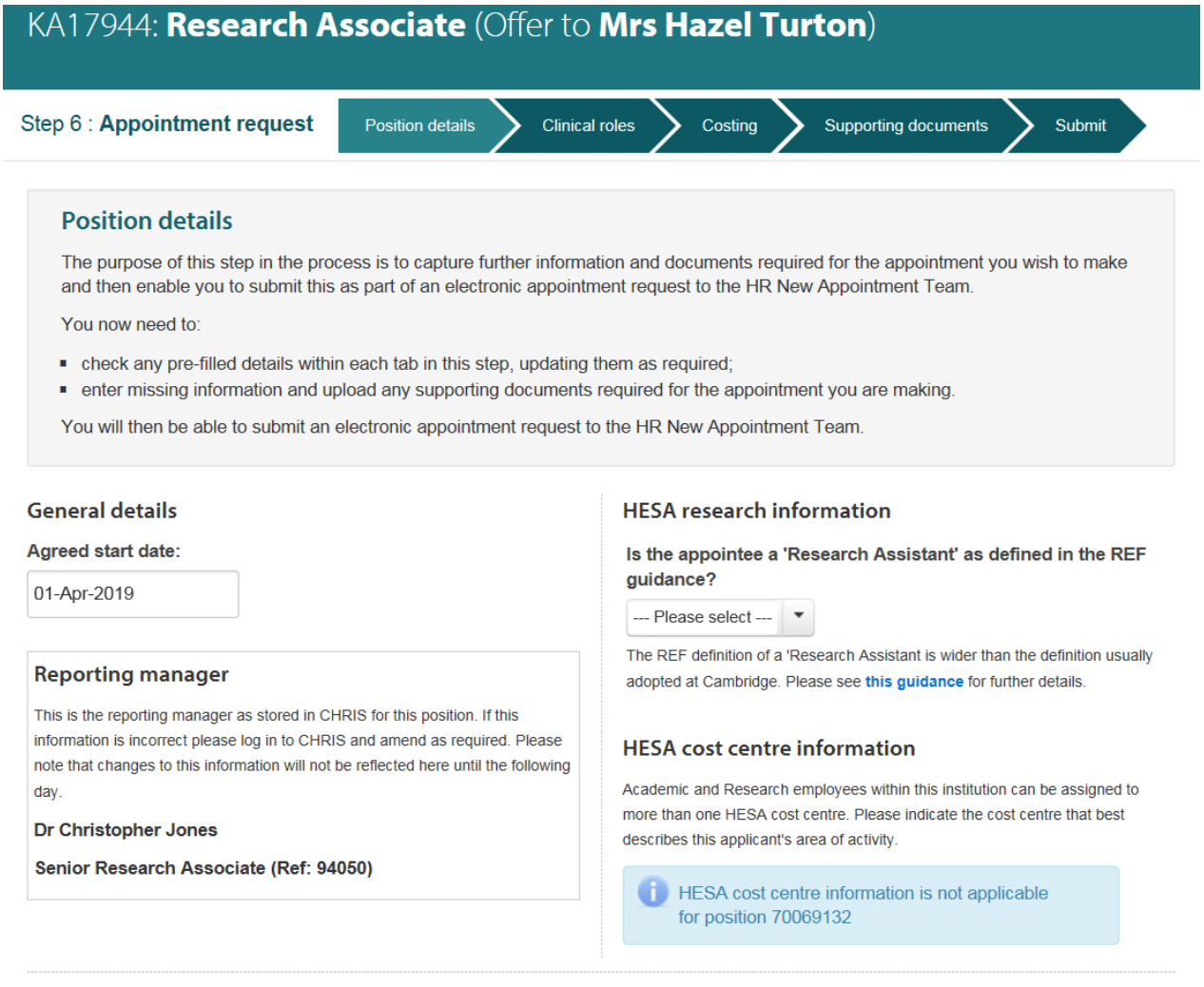
As with all of the other steps in the offer process, wherever information is available for the position in CHRIS, the values are defaulted on the screen so that you can check and confirm them.

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

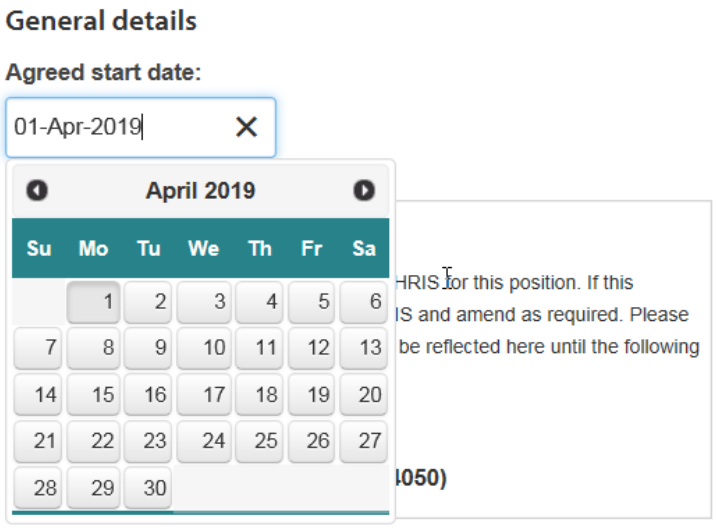



## 9.1 Entering the position details

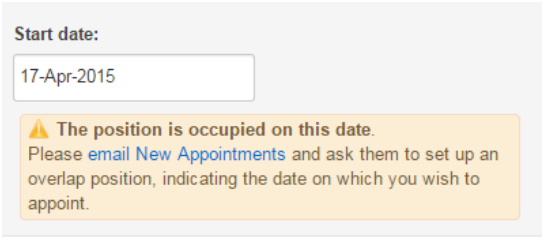
The first tab that will be displayed when you click on the **Appointment Request** menu item is the **Position details** tab.



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




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

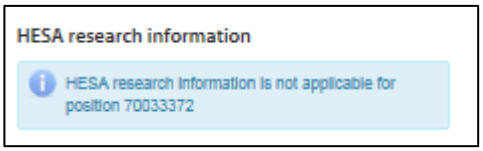



2. Review the details of the reporting manager for the position (as held in CHRIS).

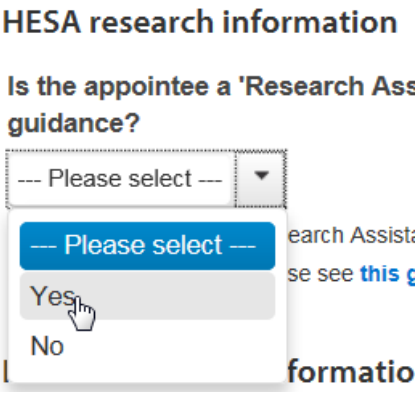
If the details are incorrect, they will need to be corrected in CHRIS. The user guide for amending a reporting manager is found on the HR Systems web pages.

3.

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

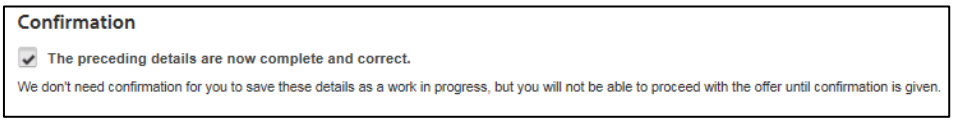



b) If HESA research information is required, then further fields will be displayed. Please complete these (as applicable).




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

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




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

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

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

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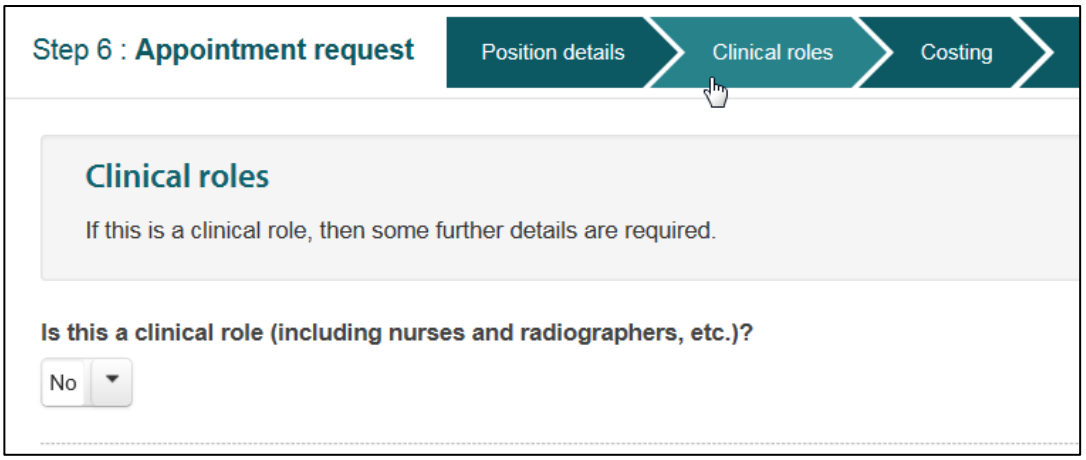
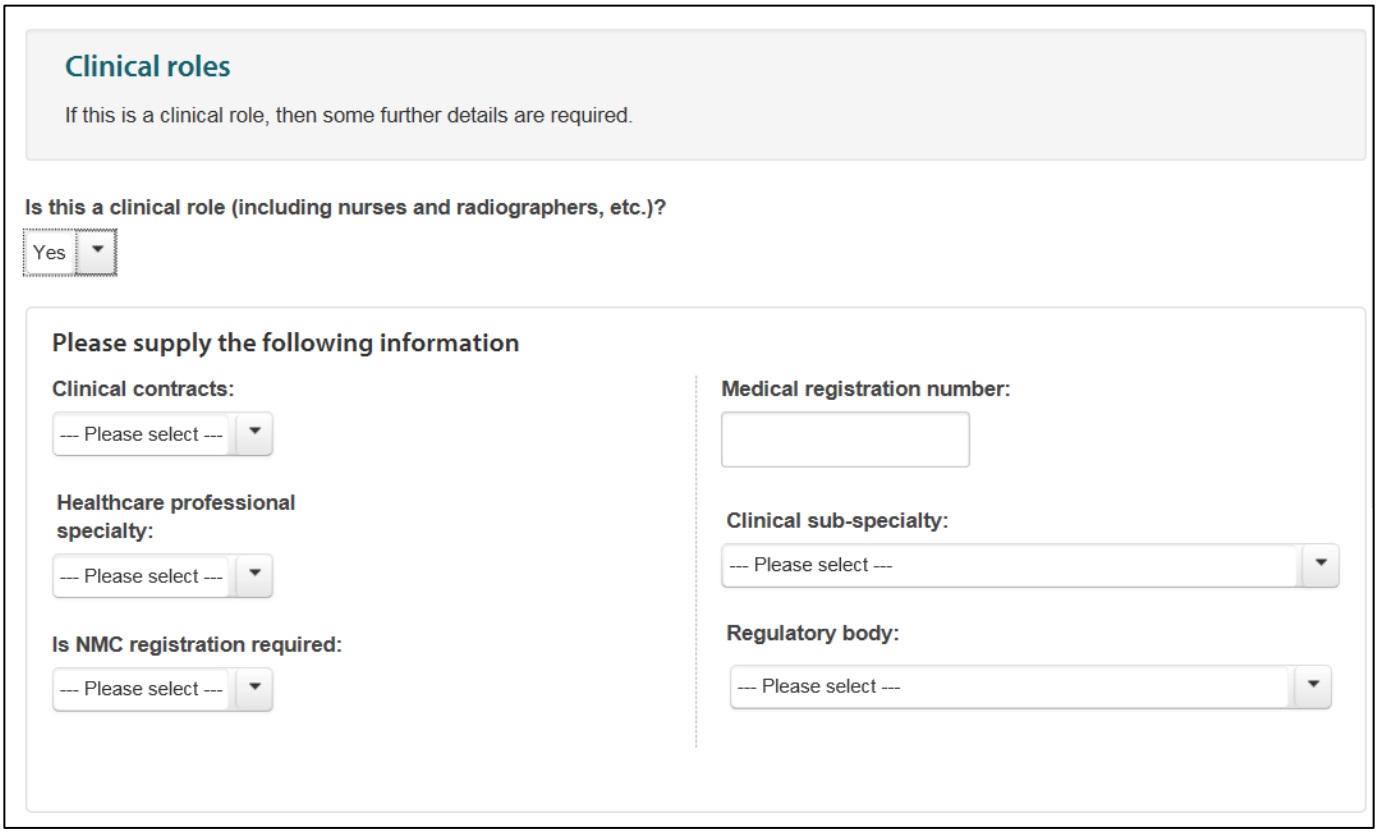
## 9.2 Entering clinical role details

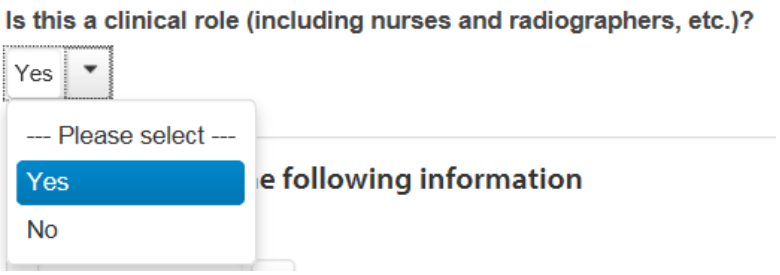
Where the role is not a clinical role, 'No' will be displayed in the Clinical role drop down.




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



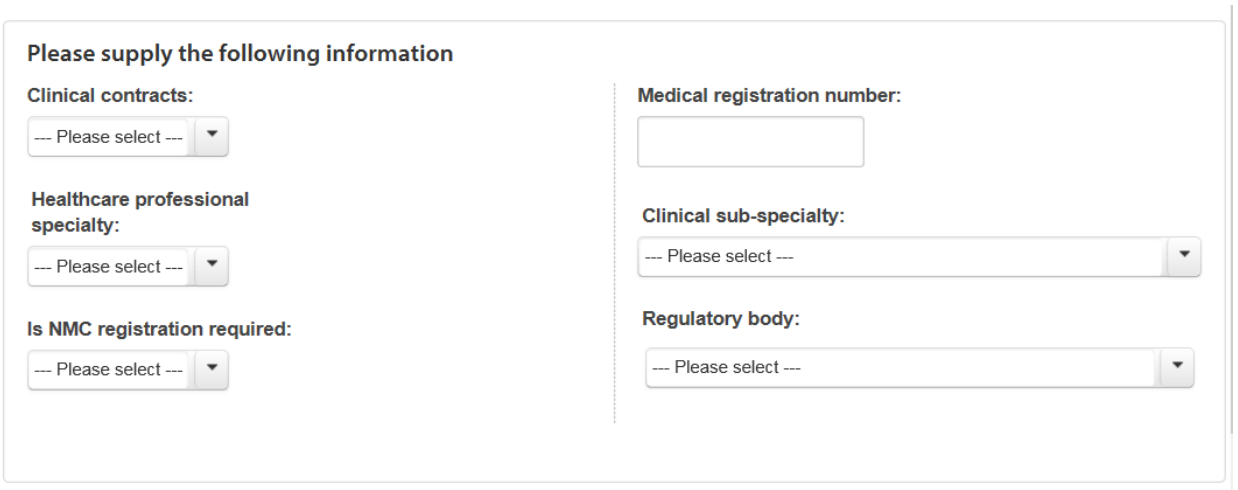
1. Confirm whether or not you are appointing to a clinical role, using the drop-down menu.



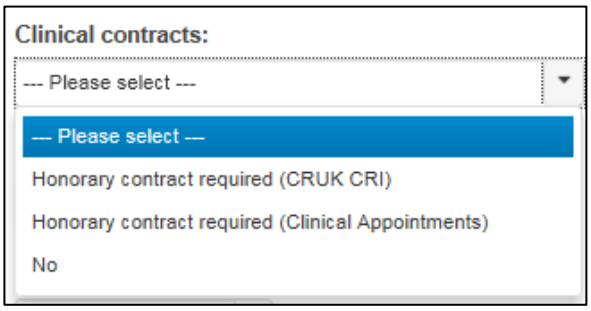

If a clinical grade was selected on the Remuneration tab in Record offer details (or defaulted to a clinical grade from CHRIS) then the default for the '**Is this a clinical role?**' field will be set to **Yes**. Please amend the default as required.

a) If **No** is selected, no further information is required on this tab.

b) If **Yes** is selected then the following screen will be displayed so that you can enter the details that the University is required to collect for HESA:

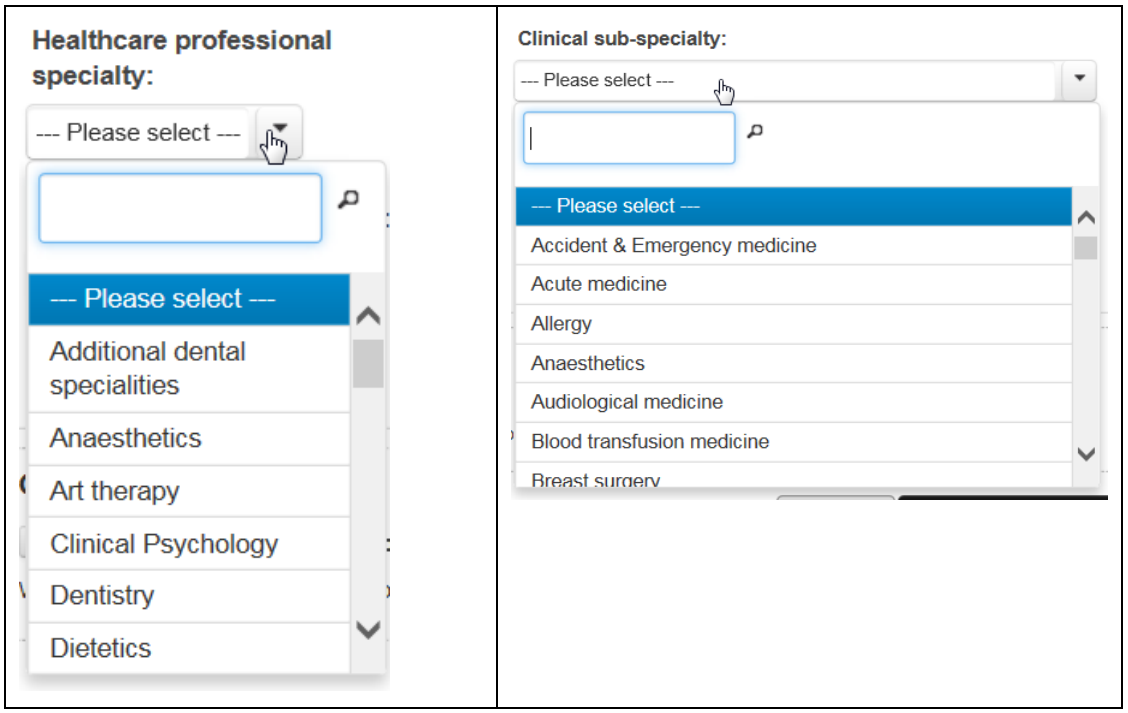



4. Enter details of the type of **clinical contract** from the drop-down menu.



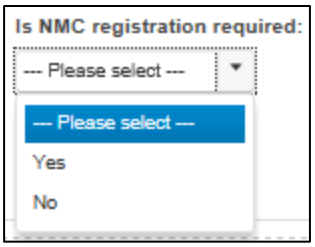

Please note that you must complete select that an Honorary Clinical Contract is required here in addition to this being listed as a required screening check in Step 2.

5. Enter the **Healthcare professional speciality** and **Clinical sub speciality** from the drop-down lists, or use the search box.




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

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




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

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

8. Enter details of the successful applicant's **Regulatory body** from the drop-down list, or use the search option to find.

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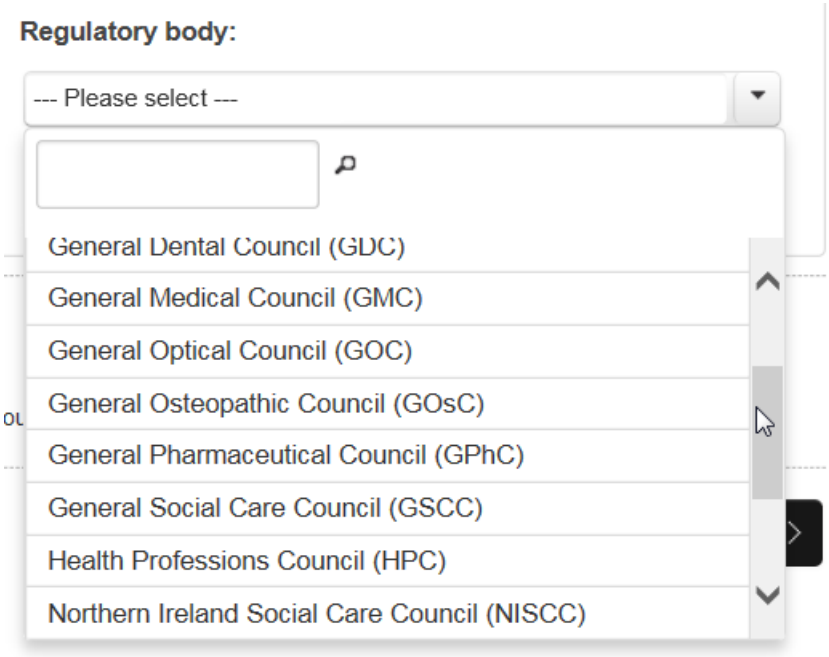
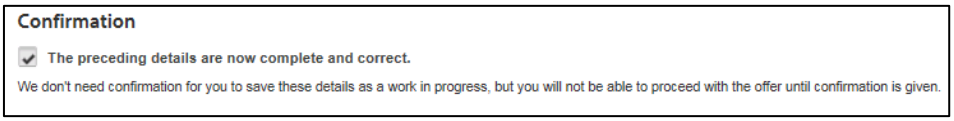
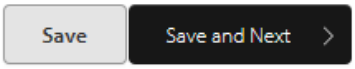



Note that the values listed are those supplied by HESA. If you find that the value that you require is not in the list, please contact the HR Analytics team for advice.

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




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




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

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

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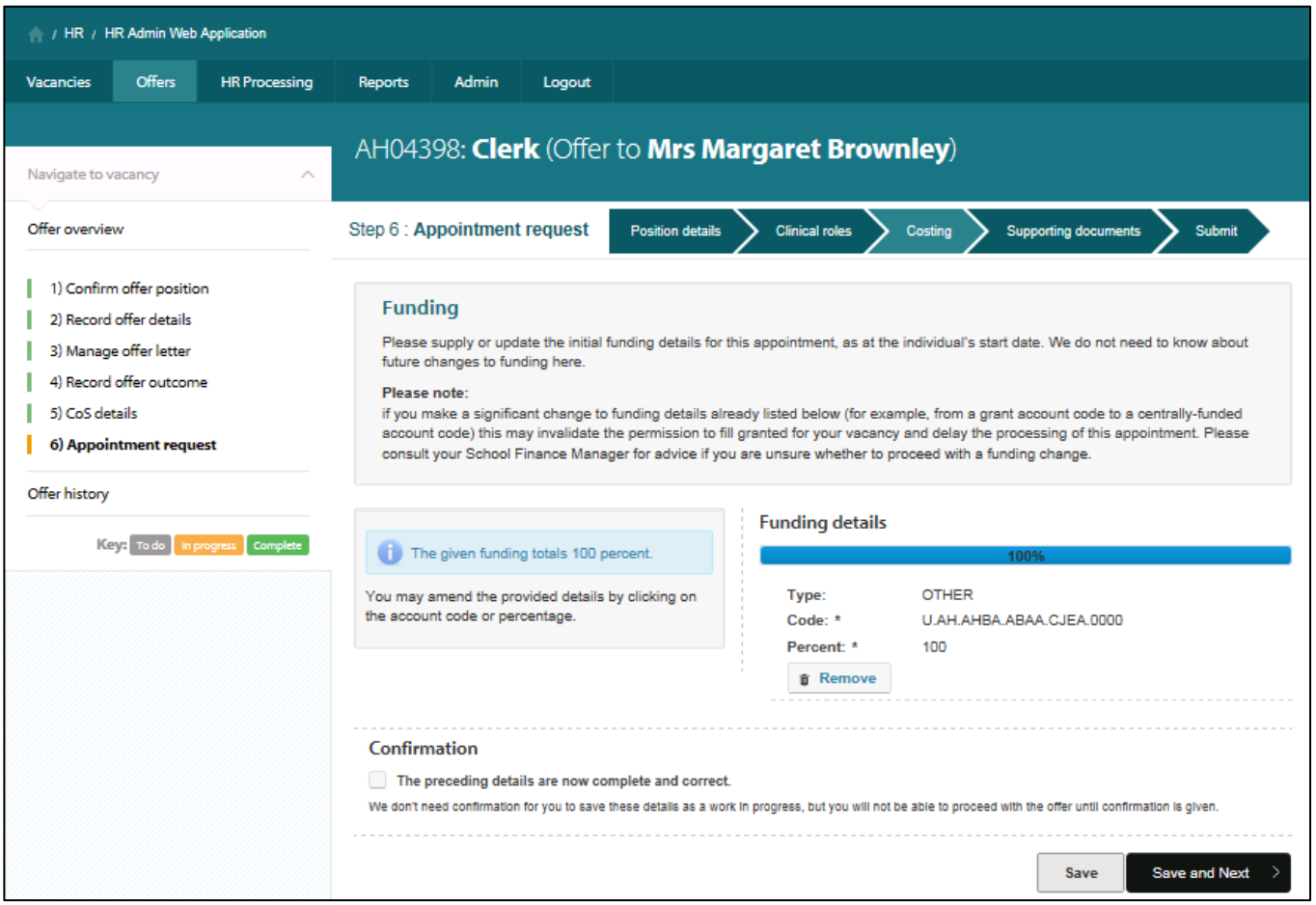
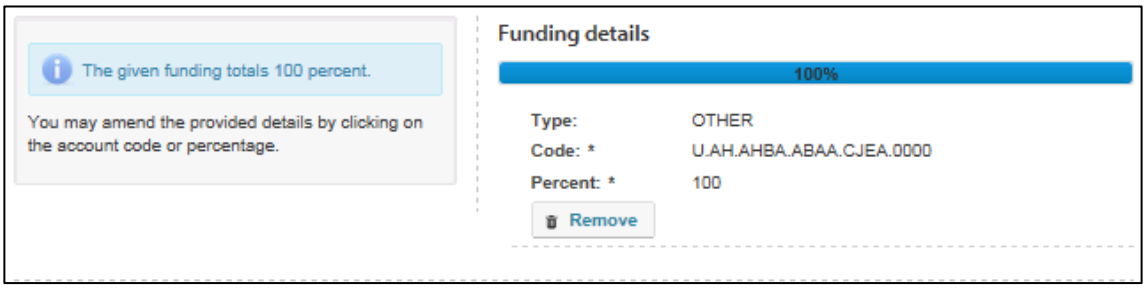
## 9.3 Entering costing details

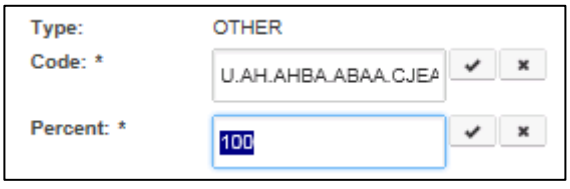
The next tab in the **Appointment Request** process is Costing. Here you will check and update the funding details for the appointment.




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

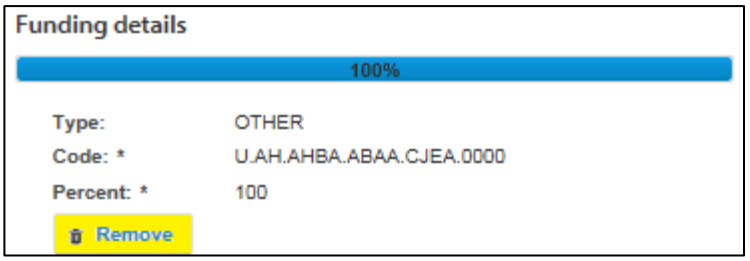



1. If any of the funding details are incorrect then you can:
   a) Click in the fields showing the **Code** or the **Percent** to edit them.



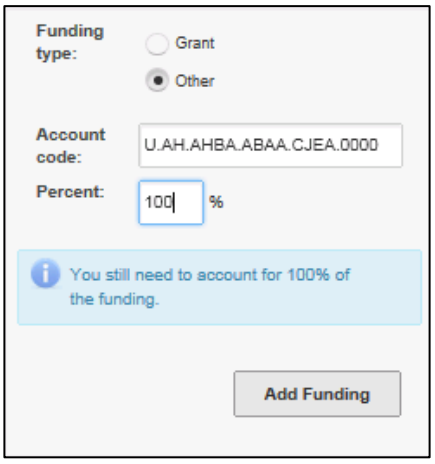
Update the details and then click on the tick next to the field in order to save the changes.

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

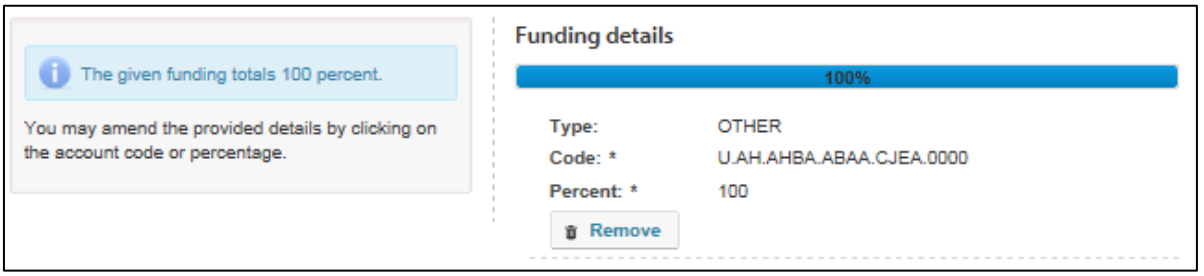



The funding entry will then be removed from the list.

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




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

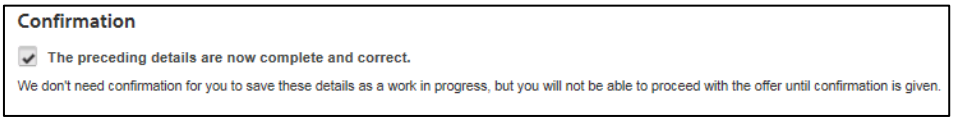



Please note that the funding details must total 100% or you will not be able to select '**save and next**'.

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

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

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




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

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

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

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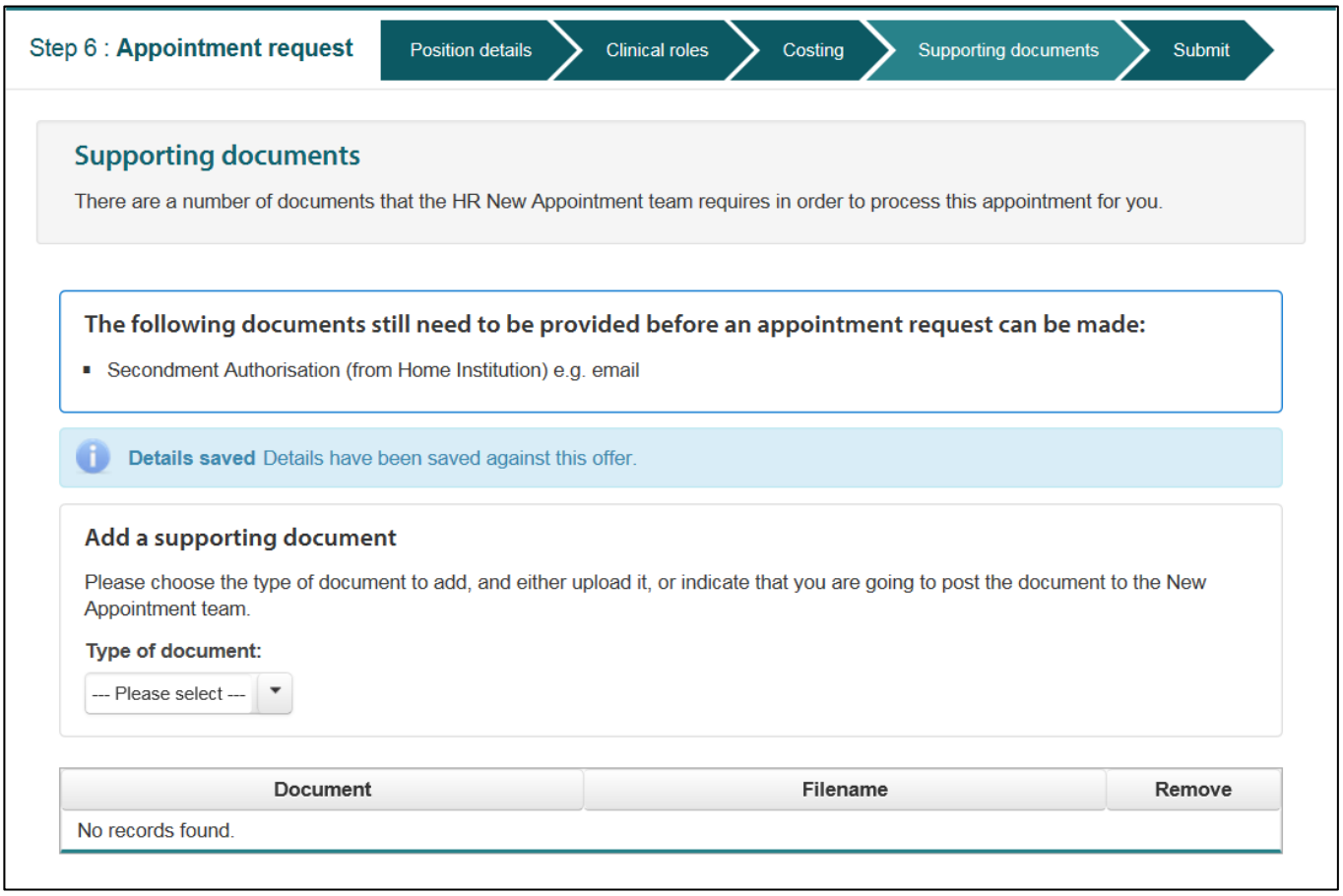
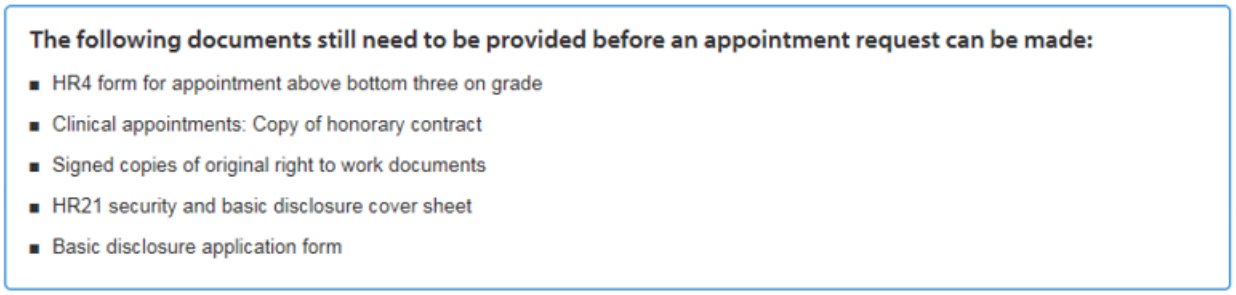
## 9.4 Adding details of supporting documents

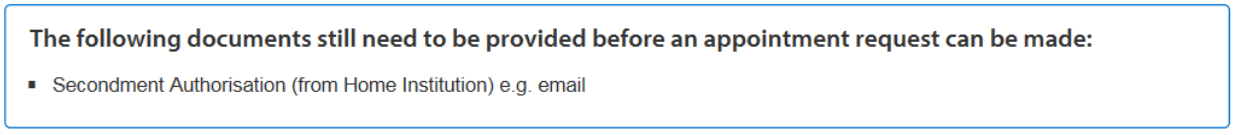
The next tab in the **Appointment Request** process allows you to upload the required supporting documents or confirm that you have posted them to the New Appointment Team.




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

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

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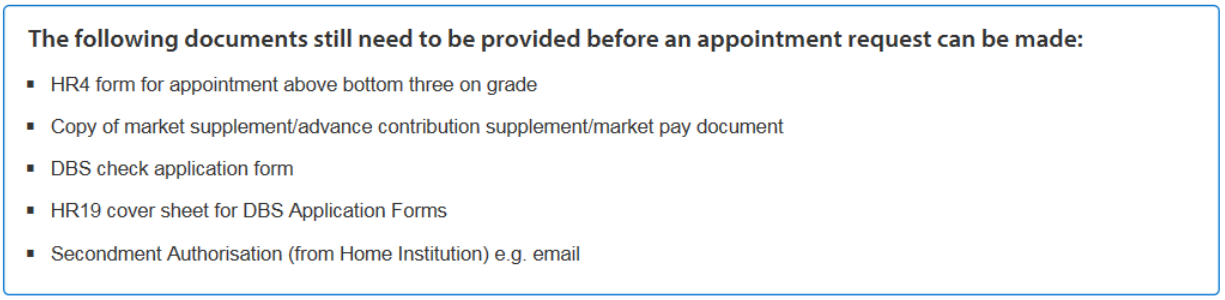
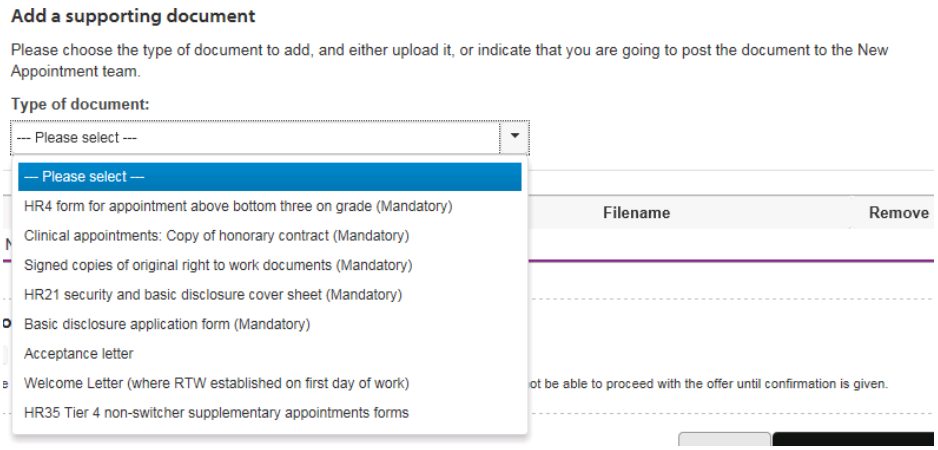
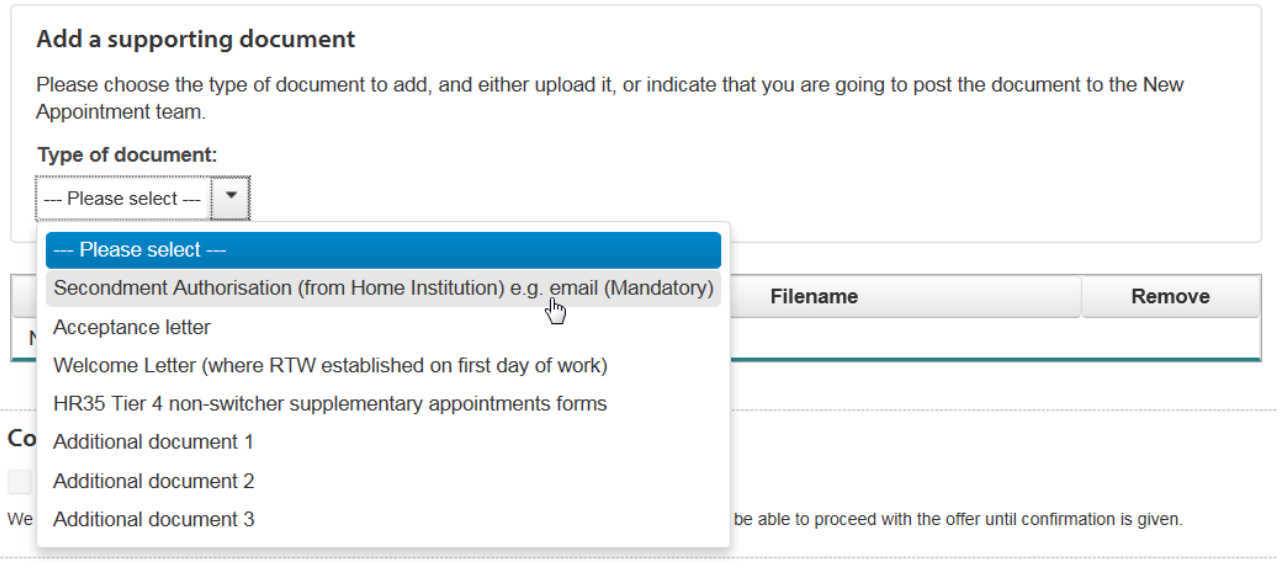


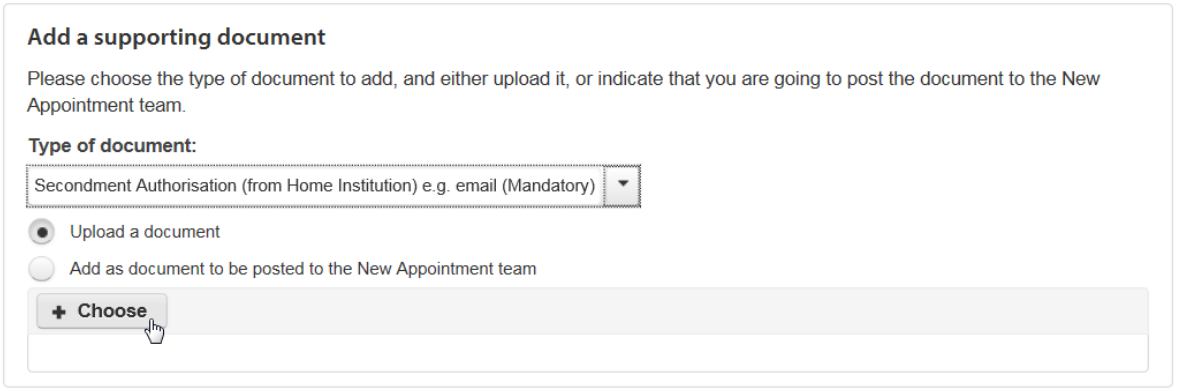

Further supporting documents that you may need to provide in certain circumstances are found in the drop-down list.




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

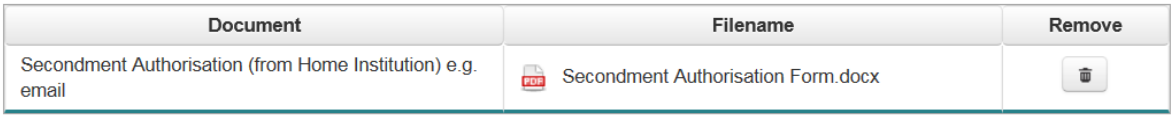



a) If you wish to upload an electronic copy of the document, click on **Upload a document** and then the **Choose** button.

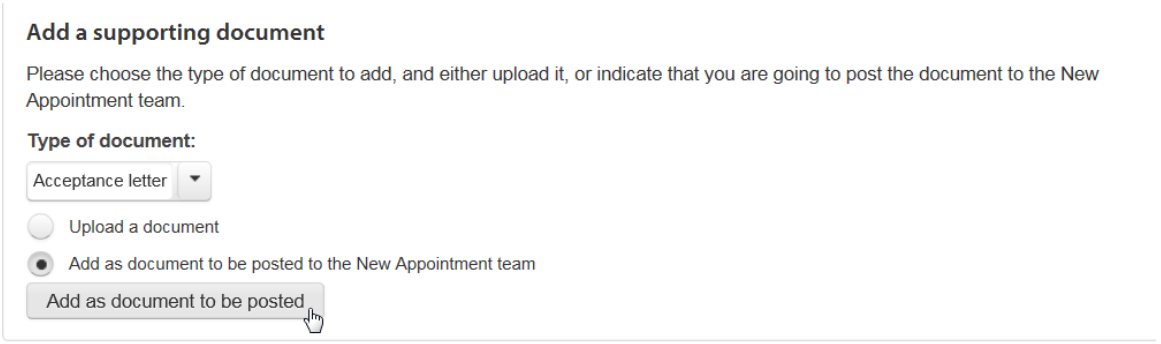



Select the required document from your file directory.

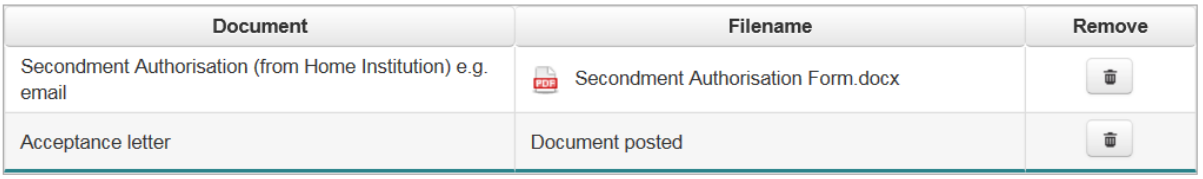
Double-click on the file or click on **Open**. The document will be added to the appointment request and this will be displayed on the screen.




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




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




You can add up to three extra documents in addition to the supporting documents that are listed.

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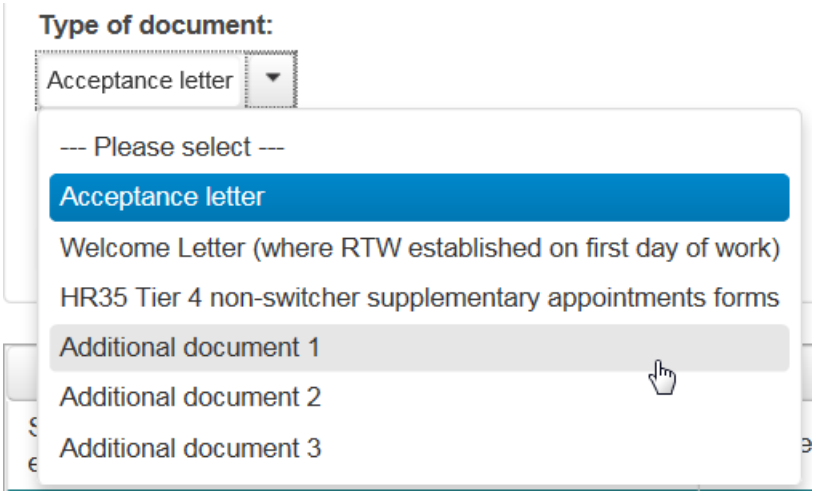
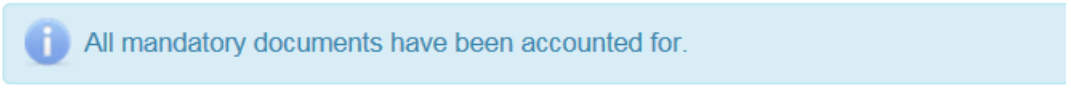



Note that any documents listed as being posted will also appear on a downloadable cover sheet that can be printed off when the request is confirmed and sent to the New Appointment Team along with the posted documents.

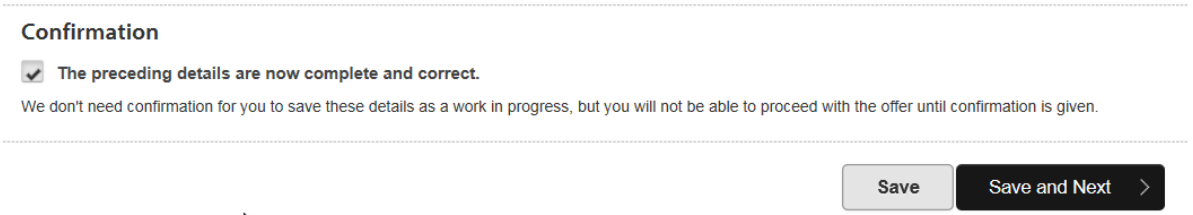
Note that where there is no Appointment Committee, other accepted records of approval to appoint can be used for established positions.

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

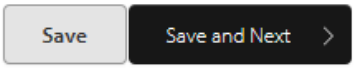
2. The system will notify you when all mandatory documents have been accounted for.




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




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




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

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

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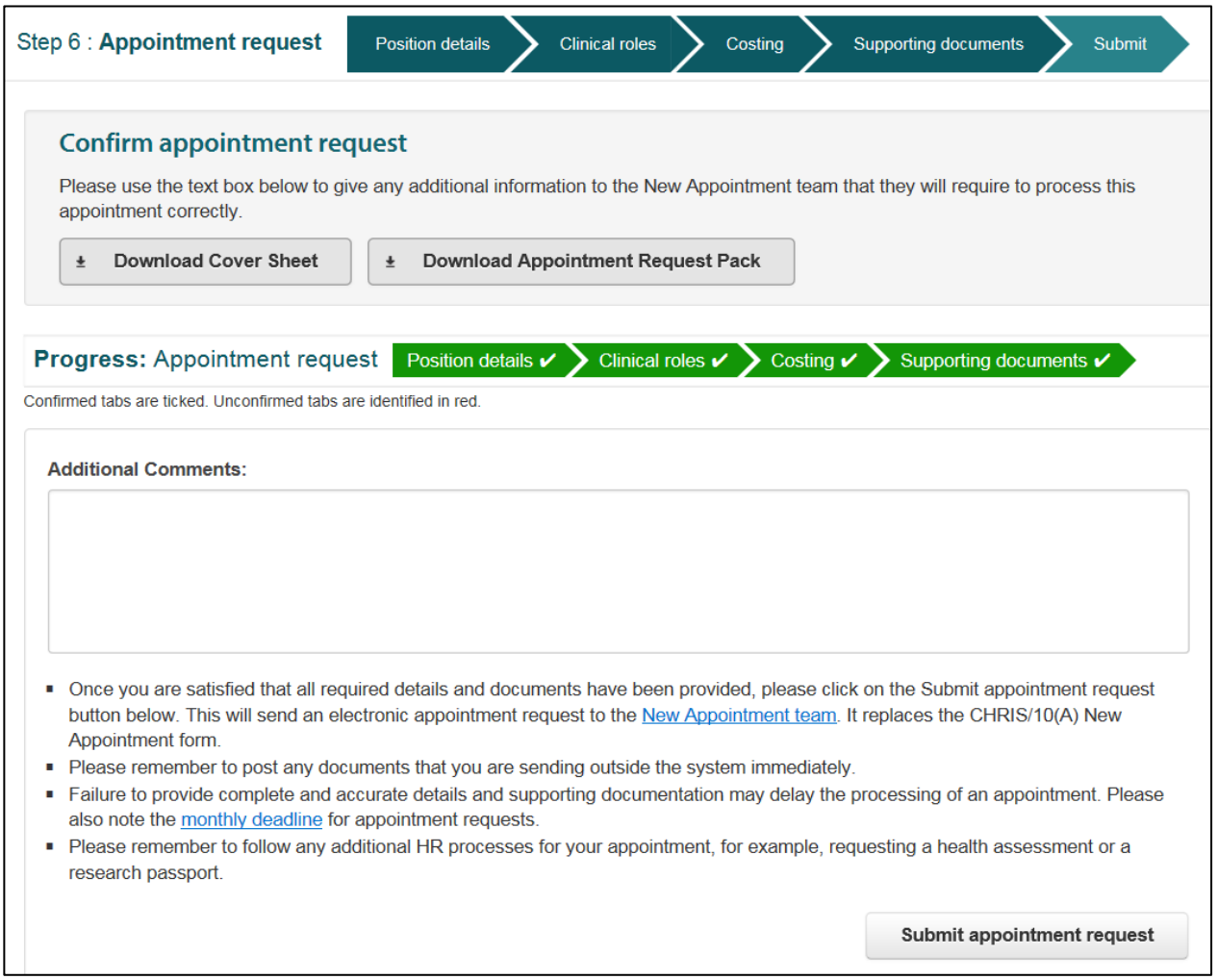
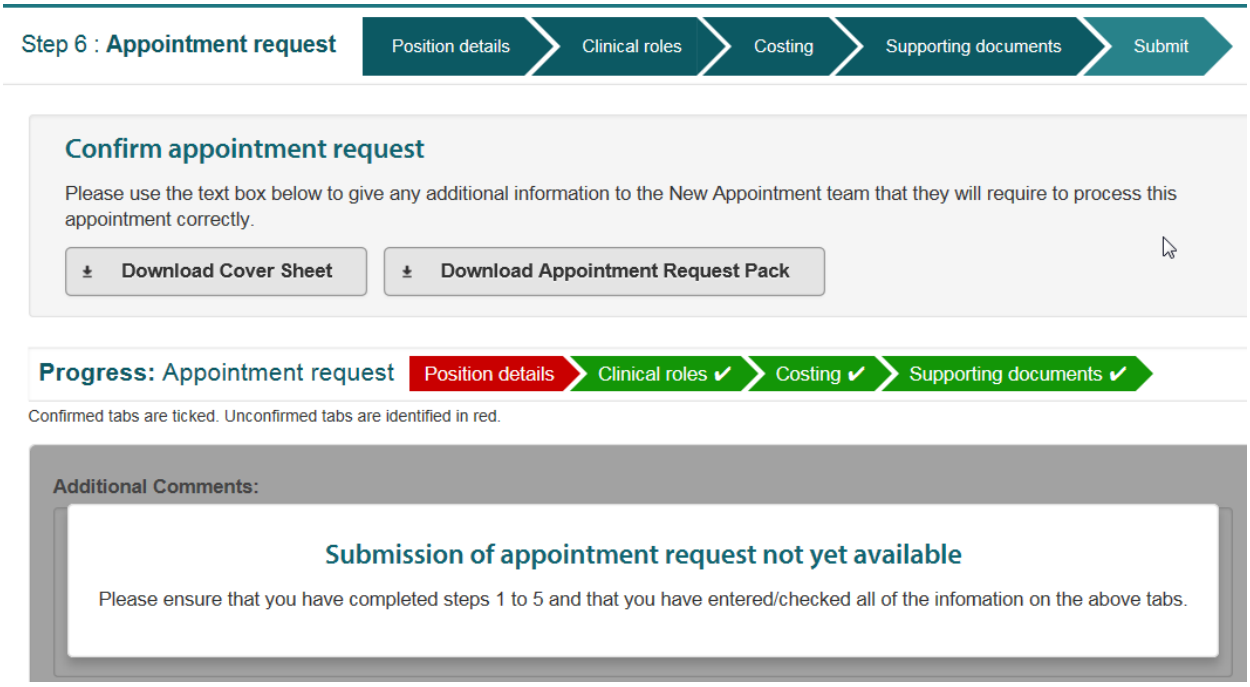
## 9.5 Submitting an Appointment Request

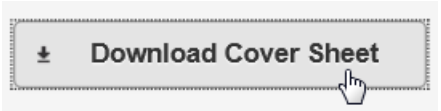
The final tab in the **Appointment Request** is **Submit.** Here you submit an electronic request for an appointment to the New Appointment team.



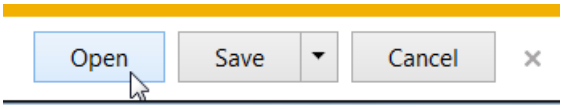

If a tab has not been marked as complete and correct the following message will be displayed. Return to the tab displayed in red to complete and confirm.




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




Click on Open




A cover sheet for your supporting documents will be downloaded.

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**New appointment - cover sheet for supporting documents**

*Send this cover sheet to the New Appointment team with any appointment documents which you need to send by post. Please see the list below and indicate the document that you have enclosed.*

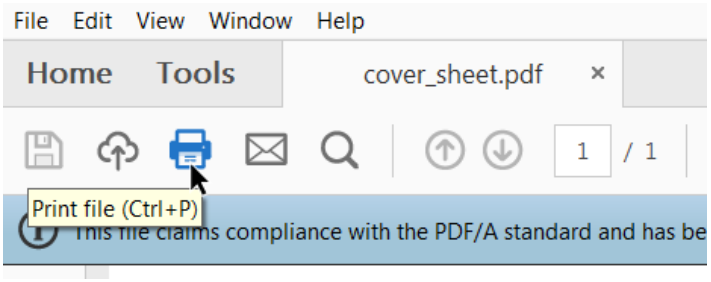
Please see http://www.hr.admin.cam.ac.uk/contact-us for New Appointment teams contact details.

| Appointee details | | Recruiter details | |
|---|---|---|---|
| Title : | **Mrs** | Name: | **Hazel Elizabeth Turton** |
| Surname | **Turton** | Email : | **Hazel.Turton@admin.cam.ac.uk** |
| Forename : | **Hazel** | | |
| Vacancy: | **KA17944 - Research Associate** | | |
| Department | **Department of Physics** | | |
| Position : | **70069132** | | |

| Cos Document |
|---|

- ☐ Evidence of qualifications
- ☐ Copy of passport
- ☐ Copy of visa
- ☐ Tier 2 CoS application form
- ☐ Evidence of name change
- ☐ Translation of qualifications

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

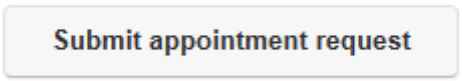



Once you have completed the rest of the steps in this part of the process, you will need to post the cover sheet with the supporting documents to the New Appointment Team. Failure to do so may result in a delay in the processing of the appointment.

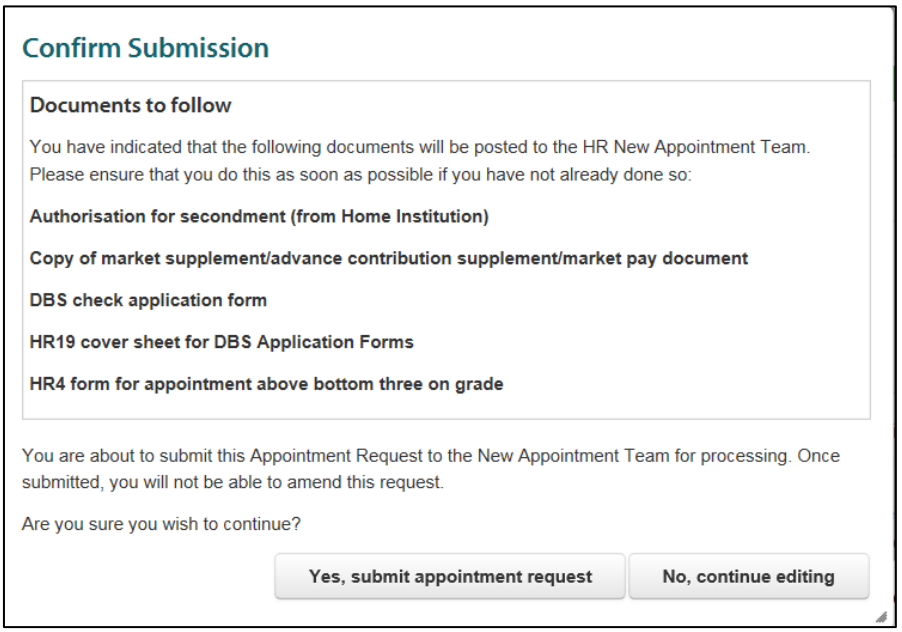
3. Add any **Additional Comments** which you believe that the New Appointment Team will require in order to process the appointment effectively. For example, you may need to specify if one of the allowances/supplements to salary needs to be charged to a different cost code.




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




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

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

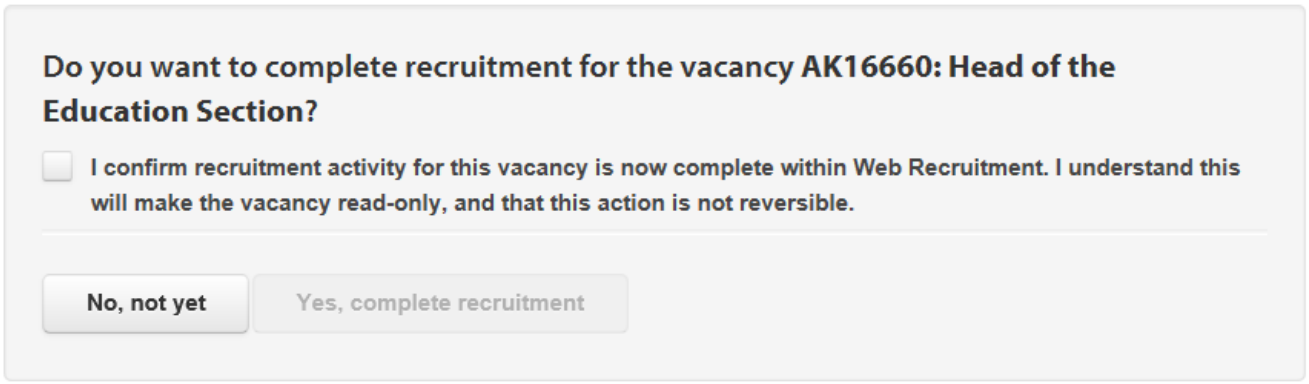
Your request will be received by the New Appointment Team to action

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

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

6. A completion of activity message will appear on your screen.

7. You will also be asked if you wish to complete recruitment for the vacancy.




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

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

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

- Will not be making any further offers or Appointment Requests for the vacancy (e.g. because you have made all of those you intend to make or because the vacancy has been withdrawn after an unsuccessful process); and

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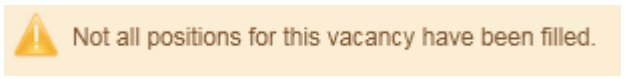
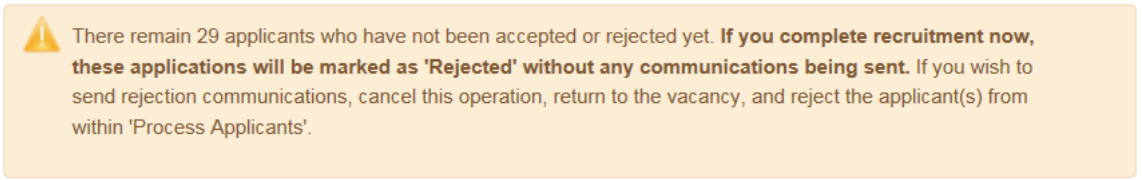
- Have no other actions to perform in the system (e.g. you have recorded outcomes for all stages of the process, sent all rejection correspondence and received references that you have requested using the system).

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

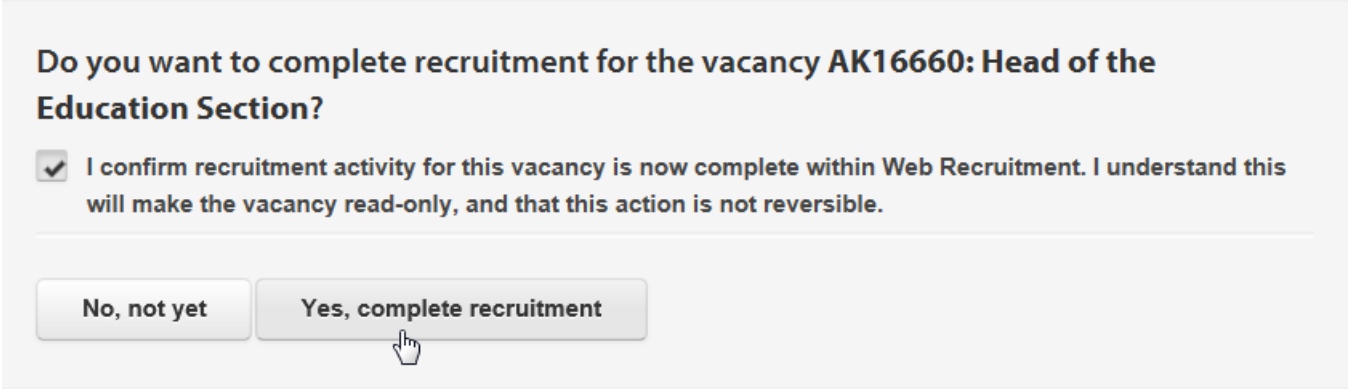



This warning message advises that there is still correspondence to be sent.



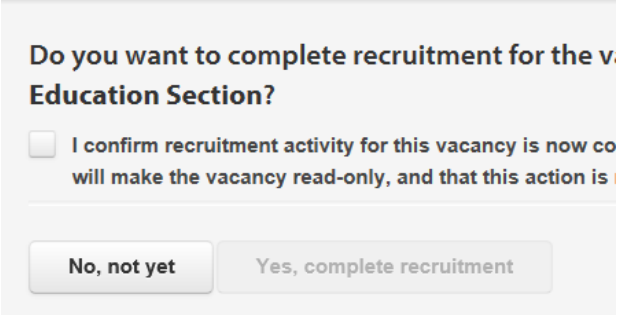

8.

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




You will be returned to the Vacancies screen.

b) If you are not yet ready to 'complete recruitment', click on the **No, not yet** button in the pop-up window.

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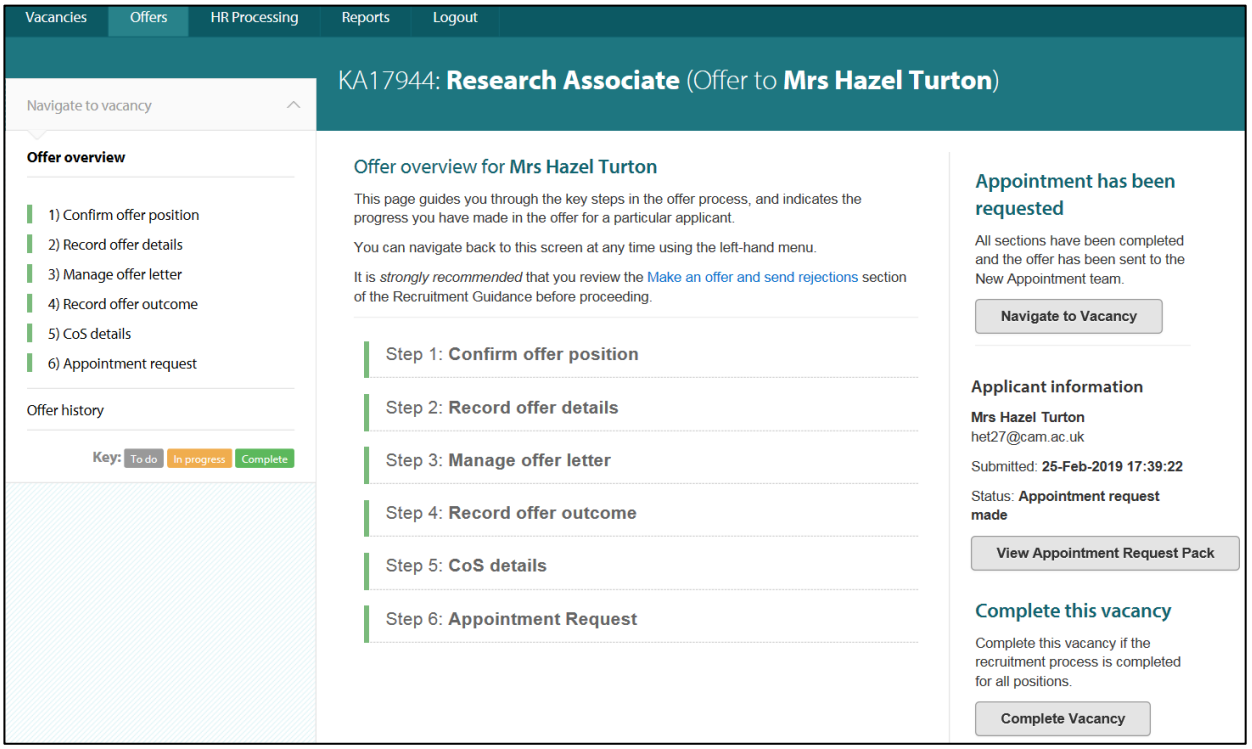
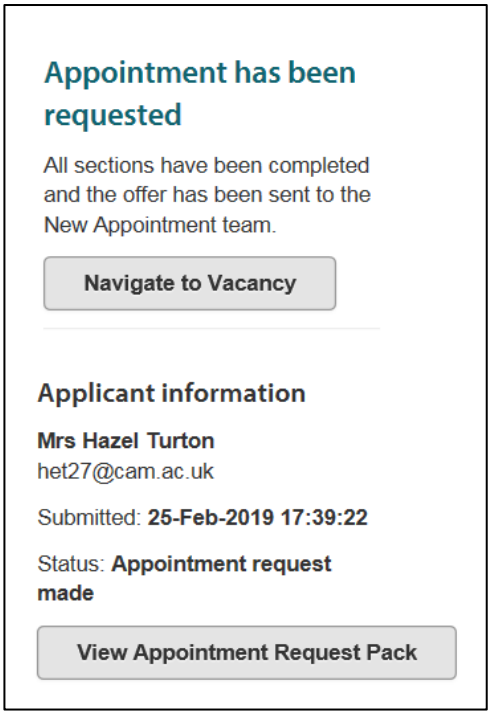
You will be routed back to the Offer overview screen.




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




You will also see that you can 'complete recruitment' from the Offer overview screen by clicking the **Complete Vacancy** button at the bottom right-hand side of the screen.

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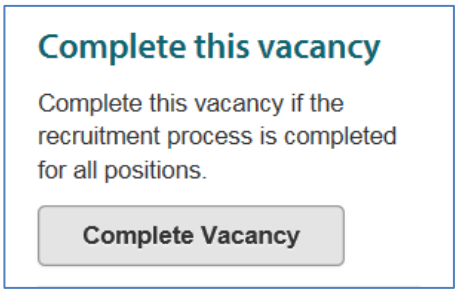
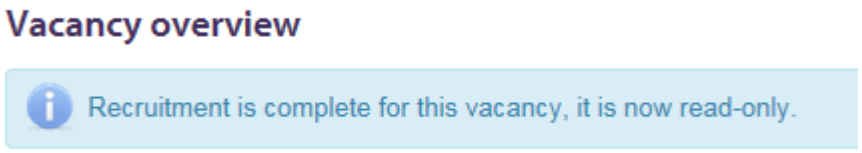



It is very important that you do this so that the system can apply the correct purging process for the information and documents held by the vacancy. This drives compliance with data protection legislation and immigration requirements in relation to record-keeping. Please see the 'Managing vacancies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

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




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

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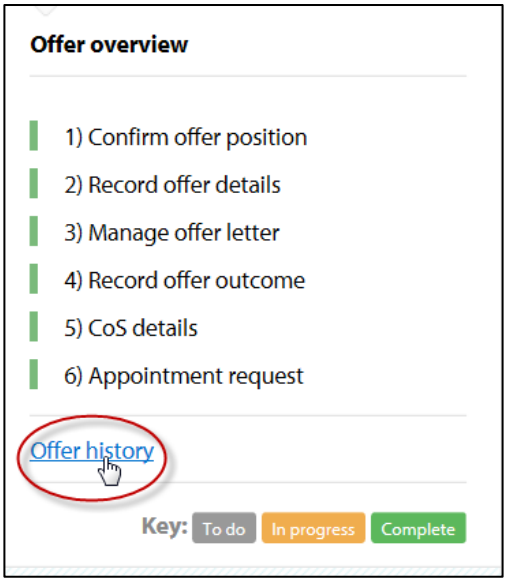
# 10. Viewing Offer History

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

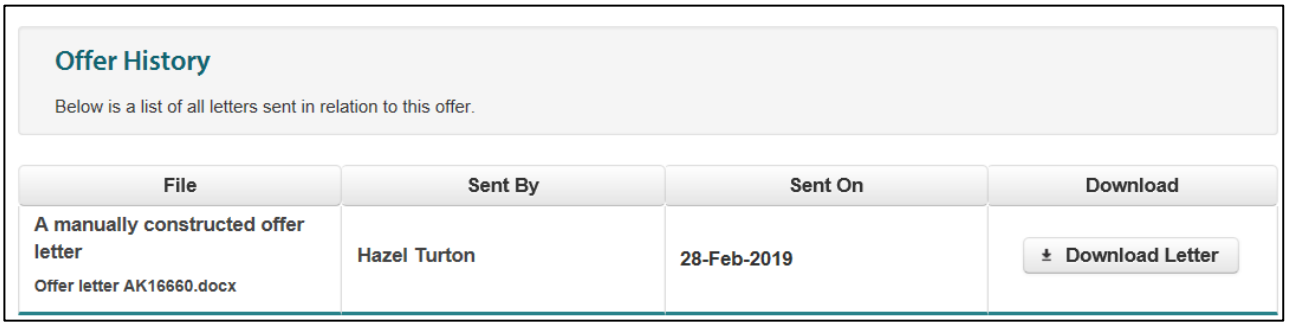
Changes made during the progress of one particular letter are not saved. The **Offer history** records only offers actually recorded as being made to the successful applicant.

To view the Offer History:

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




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

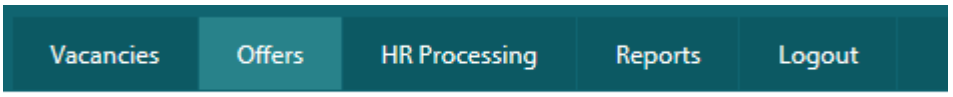



The details recorded are whether the letter was system-generated or manual, who sent it, when and a copy of the letter.

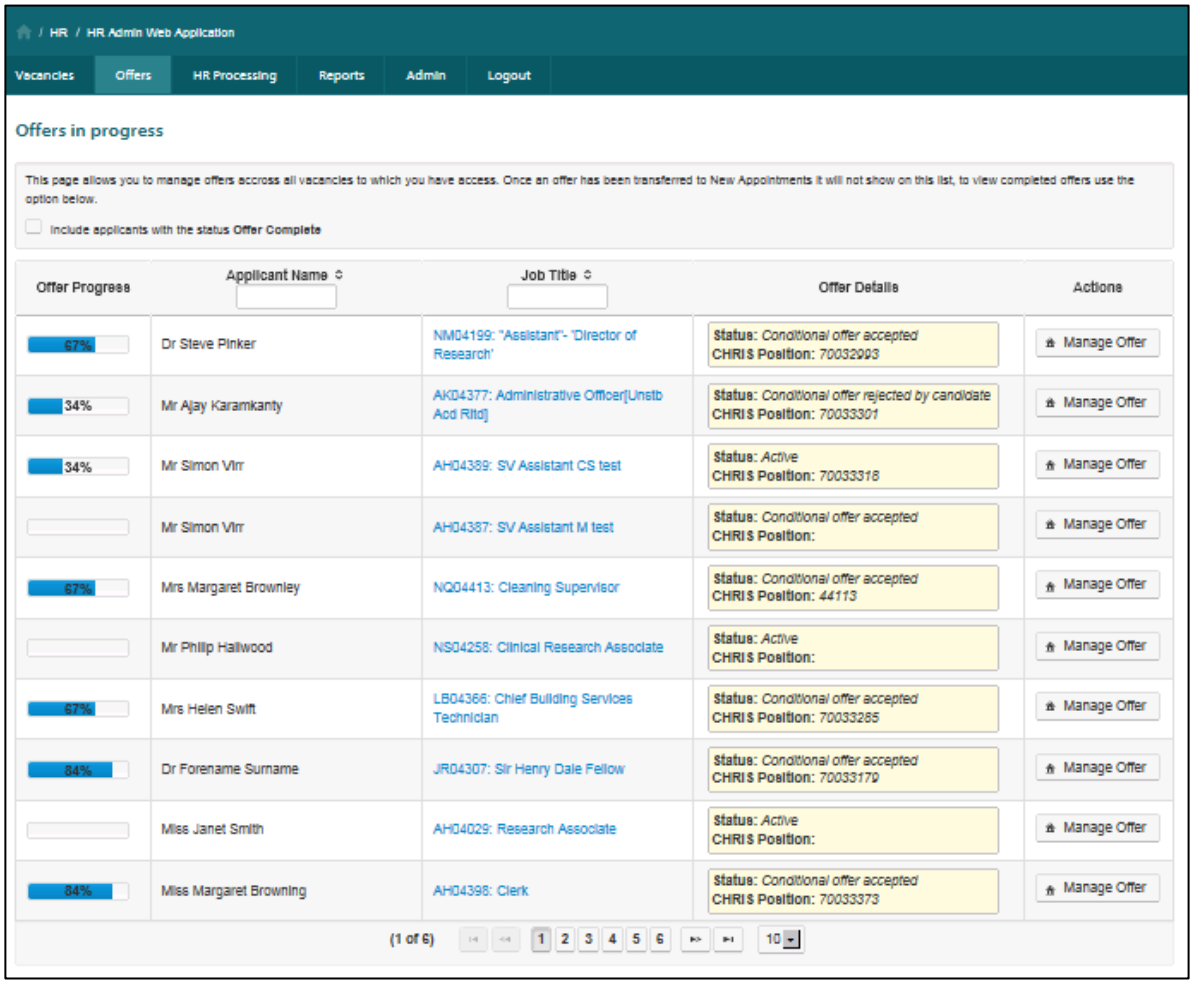
# 11. Searching for an Offer

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

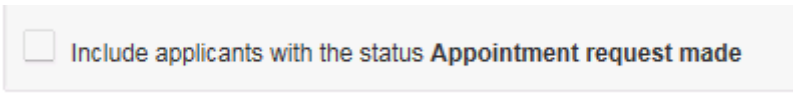
1. Click on the **Offers** tab at the top of the screen.



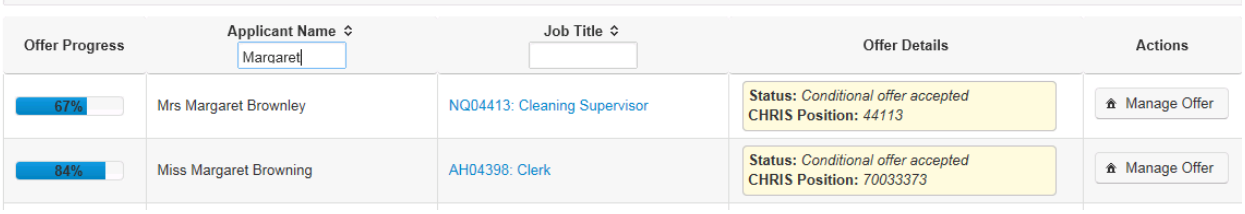

The Offers tab lists all of the offers for the vacancies to which you have access.



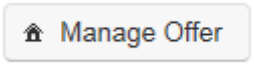

2. By default, only offers where an Appointment Request has not yet been made are shown. If you would like these to show, tick the check box shown below:



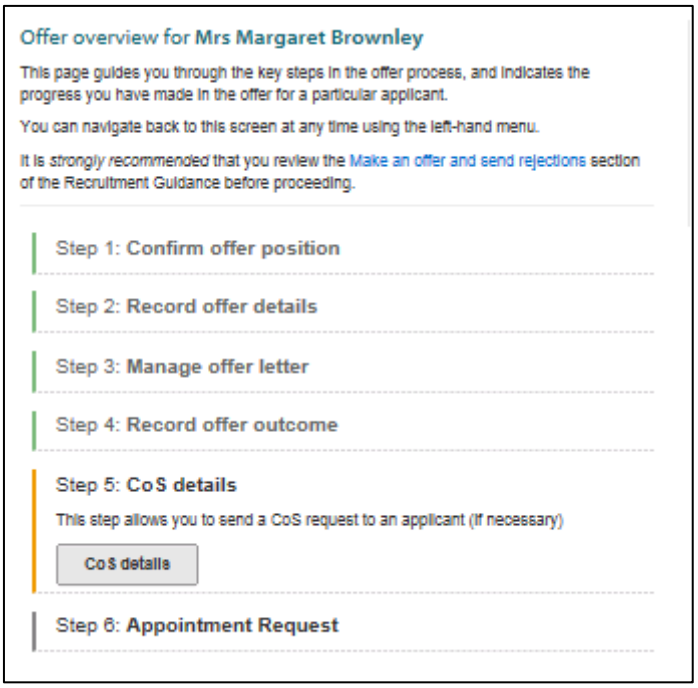
3. Identify the offer you require by seeing it in the list or by applying a filter (i.e. type in the Applicant Name or Job Title field but do not press enter).




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




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



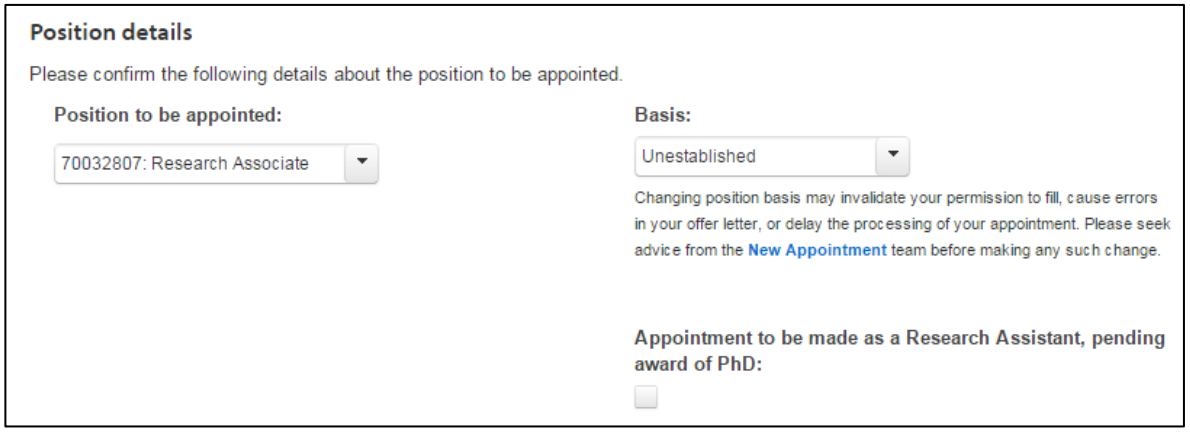
# 12. Exceptions to the 'Standard' Process

## 12.1 Under-appointments: Research Assistant/Research Associate

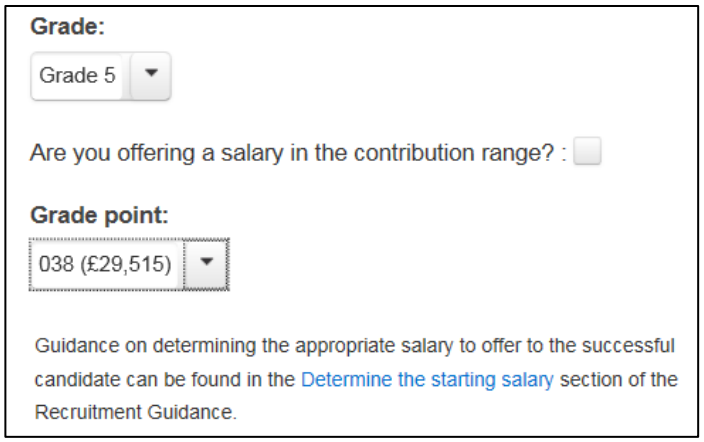
Where a job has been advertised as a "Research Assistant/Research Associate", departments/ institutions often wish to appoint a candidate as a Research Assistant pending award of their PhD, when he/she will become a Research Associate. The system provides facilities to generate an appropriate offer letter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

You should read the section of the Recruitment Guidance on Research under-appointments before making such an appointment.

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




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




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

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## 12.2 Appointments still requiring a CHRIS/10

In some cases, it will not be possible for you to use the Web Recruitment System to generate an offer or an Appointment Request. There are some positions which have particular complexities that cannot currently be handled by the Web Recruitment System. These are as follows:

- Proctors
- Library Invigilators on Invigilator rates;
- Cambridge Archaeological Unit Archaeologists;
- Associate Lecturers

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