

Shortlisting applicants online using the system for employers **user guide**



Created by the NHS Jobs Training and Support Team

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Overview

This guide provides instructions for how to shortlist applicants by scoring them using the systems functionality to make a shortlisting decision.

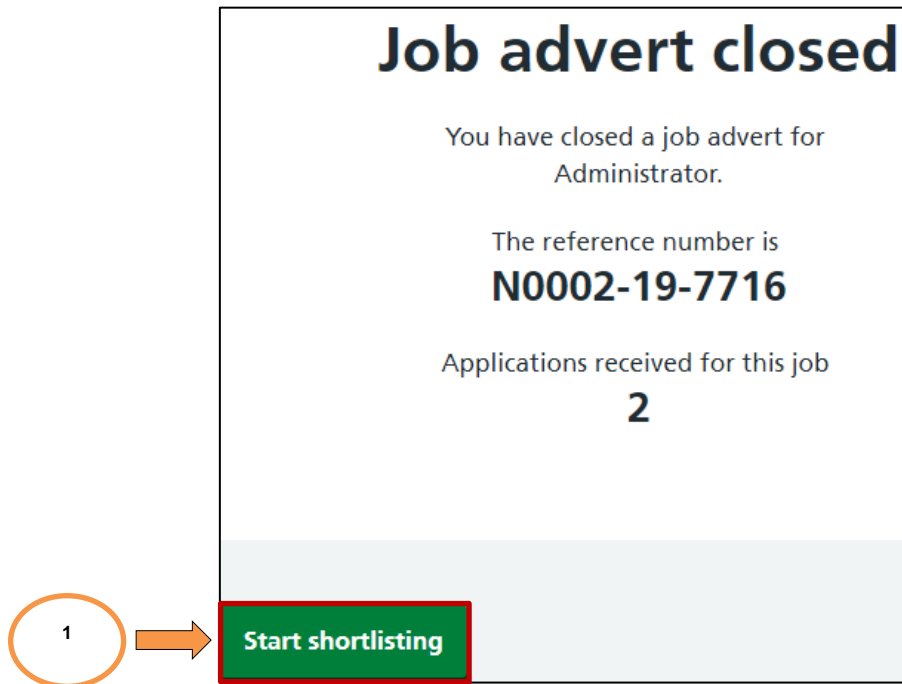
Audience

This guide is for use by employers only.

Start shortlisting

This section provides instructions for how to start shortlisting applicants. The job advert must be closed before shortlisting can start.

1. Select **Start shortlisting**.



Online using NHS Jobs

This section provides instructions for how to choose shortlisting online. Once a shortlisting decision has been made it cannot be changed.

2. Select the **Online using NHS Jobs** tick box.
3. Select **Save and continue**.

The screenshot shows a form titled "How do you want to do your shortlisting?". Below the title is a warning: "You cannot change this decision." There are two radio button options: "Online using NHS Jobs" and "Offline on paper". The "Online using NHS Jobs" option is highlighted with a red border. An orange circle with the number "2" and an arrow points to this option. Below the options is a green button labeled "Save and continue", which is also highlighted with a red border. An orange circle with the number "3" and an arrow points to this button.

How do you want to do your shortlisting?

You cannot change this decision.

Online using NHS Jobs
Score your applications by ticking the box next to the criteria you listed in your person specification.

Offline on paper
Print your applications and score them manually against the criteria you listed in your person specification.

Save and continue

Score your applications now

This section provides instructions for how to score your applications.

4. Select 1 applications to score.

Closed advert

Score your Administrator applications now

Your advert closed on 10 Sep 2019. There were 1 applications in total. You've got 1 applications to score.

You need to complete your scoring before you select your shortlist.

[+ 1 applications to score](#)

5. Select Score this application to view the application information and score the applicant.

[- 1 applications to score](#)

Applicant ID	Action
AR-190910-00003	Score this application

Qualifications

This section provides instructions for how to score the applicant against their application and essential and desirable (Optional) qualifications criteria.

6. Select an **essential** tick box if the applicant has met any criteria.
7. Select a **desirable** tick box if the applicant has met any criteria (Optional).

If an applicant has not met the criteria then **do not** tick the criteria.

Score applicant
AR-190910-00003

Qualifications

Academic

Subject	Place of study	Result	Qualification type	Dates
English	St Thomas More RC High School	A	GCSE	March 2007 to April 2007
Maths	St Thomas More RC High School	A	GCSE	March 2007 to April 2007
Science	St Thomas More RC High School	A	GCSE	March 2007 to April 2007

Essential criteria

Select all they've evidenced.

GCSE grade A to C in English and Maths

Qualified to NVQ level 2 in Administration

← 6

Desirable criteria

Select all they've evidenced.

Qualified to NVQ level 3 in Administration

← 7

Job history

This section provides instructions for how to score the applicant against their application and essential and desirable (Optional) job history criteria.

8. Select an **essential** tick box if the applicant has met any criteria.
9. Select a **desirable** tick box if the applicant has met any criteria (Optional).

If an applicant has not met the criteria then **do not** tick the criteria.

Job history			
Job title	Employer	Main tasks	Dates
Subject Matter Expert	NHSBSA	Communicating with Private Beta partners, liaising with and passing relevant information to the contact centre, assisting with training guides and documents and managing NHS Jobs social media accounts.	June 2019 to September 2019

Essential criteria

Select all they've evidenced.

Experience of working within a busy admin team

Experience of dealing with multiple tasks

← 8

Desirable criteria

Select all they've evidenced.

Experience of working in a GP practice

← 9

Additional criteria (Optional)

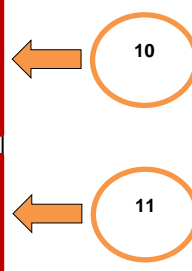
This section provides instructions for how to score the applicant against their application and essential and desirable (Optional) additional criteria. For example knowledge and skills.

10. Select an **essential** tick box if the applicant has met any criteria.

11. Select a **desirable** tick box if the applicant has met any criteria (Optional).

If an applicant has not met the criteria then **do not** tick the criteria.

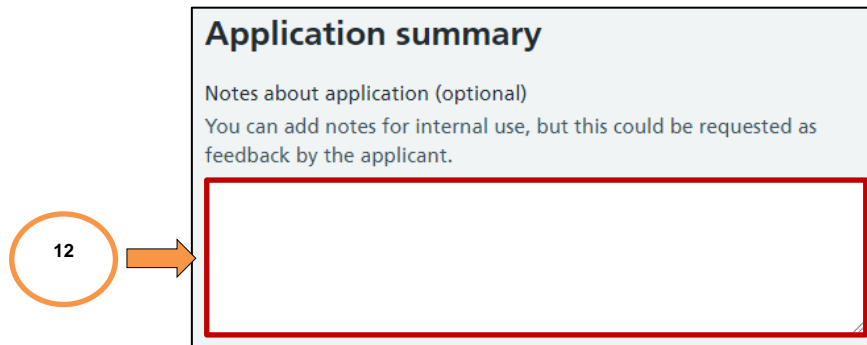
Knowledge and skills	
Essential Knowledge and skills Good interpersonal and communication skills	Do they meet the essential criteria? Select all they've evidenced. <input type="checkbox"/> Good interpersonal and communication skills
Desirable Knowledge and skills Good IT skills	Desirable criteria Select all they've evidenced. <input type="checkbox"/> Good IT skills



Application summary (Optional)

This section provides instructions for how to add notes to an application (Optional). This information is used for internal use and could be requested as feedback by the applicant.

12. Enter the **note** information into the box.



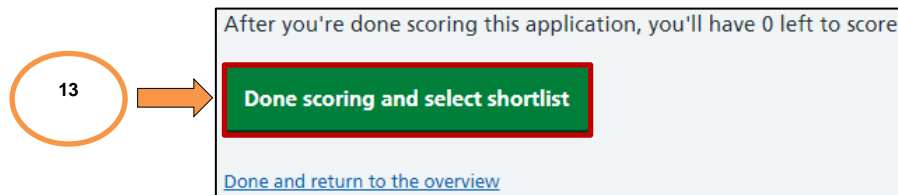
The image shows a screenshot of a web form titled "Application summary". The form has a light blue header area with the title "Application summary" in bold. Below the title, there is a subtitle "Notes about application (optional)" and a paragraph of text: "You can add notes for internal use, but this could be requested as feedback by the applicant." Below this text is a large, empty rectangular box with a red border, intended for entering notes. To the left of this box, there is a callout consisting of a circle containing the number "12" and an arrow pointing to the red-bordered box.

Complete scoring and shortlist

This section provides instructions for how to check all applications have been scored and to select your shortlist.

The number of applications remaining will show as **0** once all scoring is complete. All applications must be scored before you can continue to shortlist.

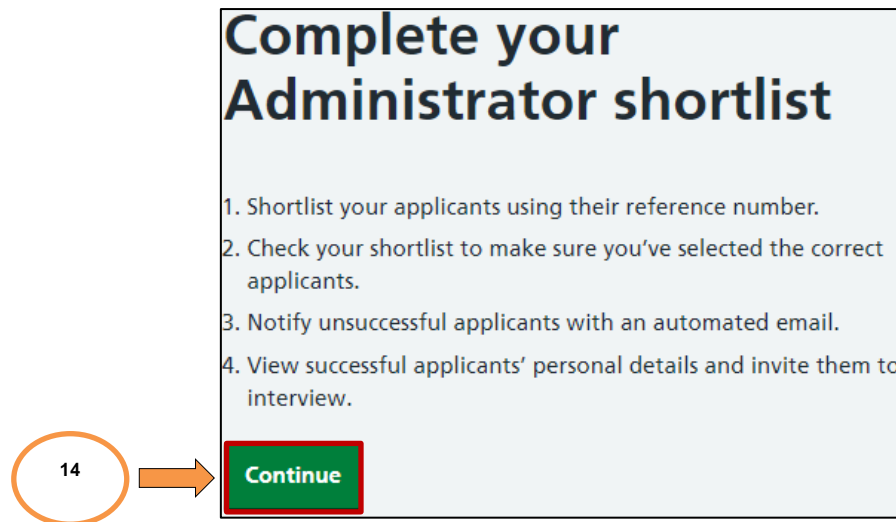
13. Select **Done scoring and select shortlist**.



Complete your shortlist

This section provides instructions for how to complete your shortlist.

14. Read the guidance and select **Continue**.



Complete your Administrator shortlist

1. Shortlist your applicants using their reference number.
2. Check your shortlist to make sure you've selected the correct applicants.
3. Notify unsuccessful applicants with an automated email.
4. View successful applicants' personal details and invite them to interview.

14 → **Continue**

The image shows a screenshot of a web interface. On the left, the number '14' is circled in orange, with an orange arrow pointing to the right. The main content area is a light blue box with a black border. At the top of this box, the text 'Complete your Administrator shortlist' is displayed in a large, bold, black font. Below this title, there is a list of four numbered instructions in a smaller black font. At the bottom of the box, there is a green rectangular button with a red border and the word 'Continue' written in white text.

Shortlist your applicants

This section provides instructions for how to shortlist your applicants. Each applicant has their scores broken down by essential and any desirable (Optional) criteria and total score.

15. Select the **Application reference ID** tick boxes to shortlist your applicants.

Do not tick a box if you do not want to shortlist the applicant.

16. Select **Confirm shortlist**.

The screenshot shows a table titled "Shortlist your applicants" with the following columns: Selection, Applicant reference ID, Total score, and Essential. A single row is visible with a checked checkbox in the Selection column, the ID "AR-200221-00003", a score of "2 out of 2", and "2 out of 2" in the Essential column. Below the table is a green "Confirm shortlist" button. Callout box 16 points to the checked checkbox, and callout box 17 points to the "Confirm shortlist" button.

Selection	Applicant reference ID	Total score	Essential
<input checked="" type="checkbox"/>	AR-200221-00003	2 out of 2	2 out of 2

Confirm shortlist

Check your shortlist

This section provides instructions for how to check your shortlisted applicant(s).

17. Select make changes to your shortlist to change any of the shortlisted applicants (Optional).

18. Select **Confirm shortlist**.

The screenshot shows a 'Shortlisting' page titled 'Check your shortlist'. The text reads: 'Make sure you've selected the right applicants in shortlist before you invite them to interview. You can make changes to your shortlist if you need to.' Below this is a table with columns: Applicant reference ID, Total score, Essential, and Desirable. The table contains one row with the following data: AR-190910-00003, 5 out of 8, 4 out of 5, and 1 out of 3. At the bottom of the page is a green button labeled 'Confirm shortlist'. Annotations include: a red box around the text 'make changes to your shortlist' with an orange arrow pointing to it; a red box around the 'Confirm shortlist' button with an orange arrow pointing to it from the left; and a red circle around the number '17' at the bottom center of the page.

Applicant reference ID	Total score	Essential	Desirable
AR-190910-00003	5 out of 8	4 out of 5	1 out of 3

Email your unsuccessful applicants

This section provides instructions for how to email unsuccessful applicants who have not been shortlisted. The system provides an email template and automatically adds the applicant's first name, the employer's name and job title information.

If there are **0** unsuccessful applicants then this page will not be displayed.

19. Select **Send**.

Shortlisting

Email your 1 unsuccessful applicants

Hello, [Applicant's first name]

[The employer's name] have assessed their applications for the [job title] job you applied for.

On this occasion, you're not invited to interview.

We wish you well in your future job search.

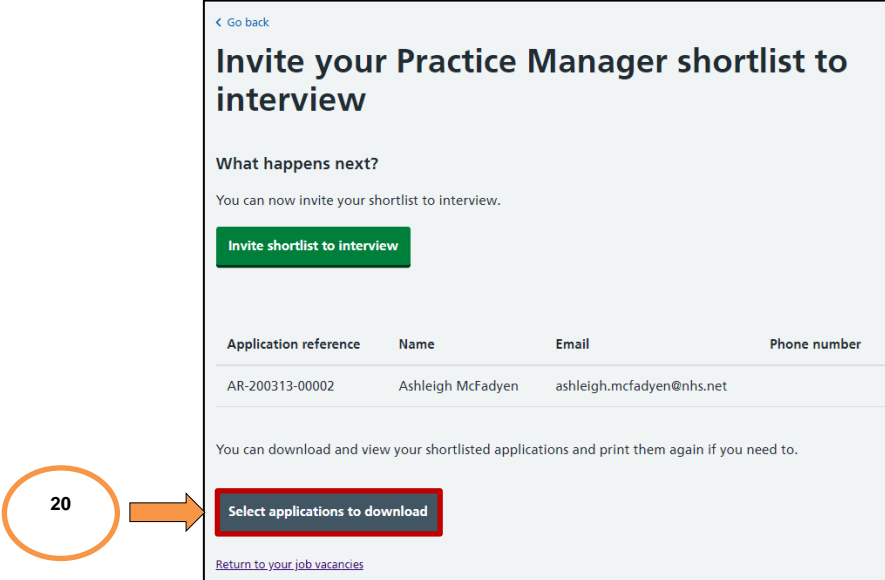
Regards,
The NHS Jobs Team

19 → Send

Select applications to download

This section provides instructions of how to select applications to download and view prior to arranging an interview.

20. Select **Select applications to download**.



The screenshot shows a web interface for inviting a shortlist to an interview. At the top left is a 'Go back' link. The main heading is 'Invite your Practice Manager shortlist to interview'. Below this, it asks 'What happens next?' and states 'You can now invite your shortlist to interview.' There is a green button labeled 'Invite shortlist to interview'. Below that is a table with the following data:

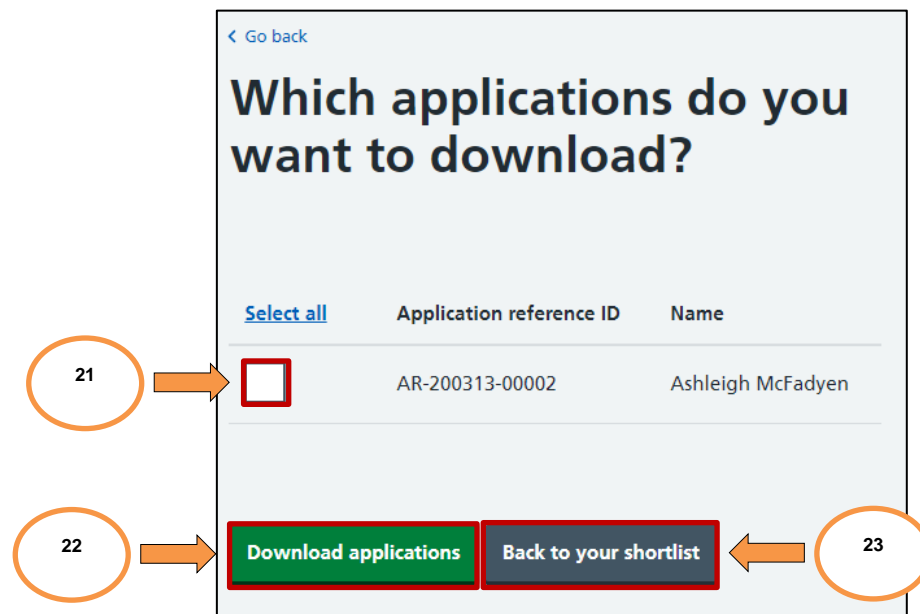
Application reference	Name	Email	Phone number
AR-200313-00002	Ashleigh McFadyen	ashleigh.mcfadyen@nhs.net	

Below the table, it says 'You can download and view your shortlisted applications and print them again if you need to.' At the bottom, there is a red button labeled 'Select applications to download' and a link 'Return to your job vacancies'.

Which applications do you want to download?

This section provides instructions for how to select and download applications.

21. Select an **application tick box** to select this application.
22. Select **Download applications** to view the application information.
23. Select **Back to your shortlist** to return to the previous page.




Check shortlist status

This section provides instructions for how to check shortlisting has been completed.

24. Find the job name and check the status is **SHORTLISTED**.

Your job adverts			
Job name	Last updated	Applications	Status
Administrator N0002-19-7716	22/07/2019	2	SHORTLISTED



End of document