

## How to manage offer letter templates in NHS Jobs user guide

This guide gives you instructions for how to manage offer letter templates in the NHS Jobs service.

You can use offer letter templates when making an online job offer to an applicant.

In your organisations account, you can:

- create an offer letter template
- preview an offer letter template
- download an offer letter template
- change an offer letter template
- delete an offer letter template

Once a template is created, it can be used by the applicable roles in your account.

To find out which roles can do this, go to the '**Roles and permissions**' link in the '**Help and information**' section of the [employer dashboard](#).

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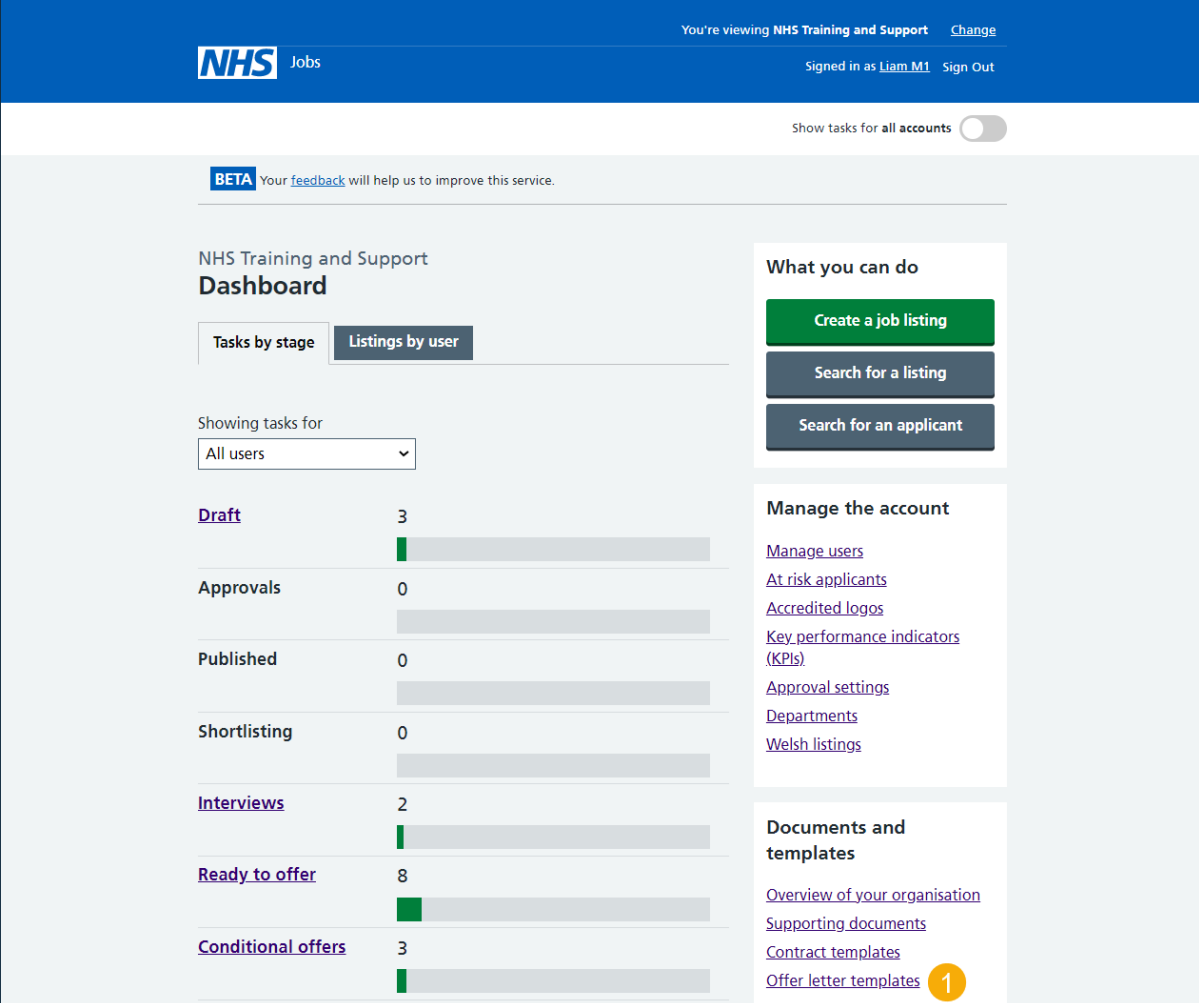
## Offer letter templates

This page gives you instructions for how to manage offer letter templates in your organisations account.

**Important:** The employer dashboard is shown. You'll only see the 'Offer letter templates' link if you are an NHS Jobs 'Super user', 'Team leader' or 'Recruitment administrator' for your organisations account.

To manage your offer letter templates, complete the following step:

1. Select the ['Offer letter templates'](#) link.



The screenshot shows the NHS Training and Support Dashboard. The top navigation bar includes the NHS logo, the text 'Jobs', and user information: 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam M1' with a 'Sign Out' link. A toggle switch for 'Show tasks for all accounts' is visible. A beta notice states: 'BETA Your feedback will help us to improve this service.'

The main content area is titled 'NHS Training and Support Dashboard'. It features two tabs: 'Tasks by stage' (selected) and 'Listings by user'. Below the tabs, a dropdown menu shows 'Showing tasks for All users'. A table displays the following data:

Task Stage	Count
<a href="#">Draft</a>	3
<a href="#">Approvals</a>	0
<a href="#">Published</a>	0
<a href="#">Shortlisting</a>	0
<a href="#">Interviews</a>	2
<a href="#">Ready to offer</a>	8
<a href="#">Conditional offers</a>	3

On the right side, there are three sections:

- What you can do:** Contains three buttons: 'Create a job listing' (green), 'Search for a listing' (dark grey), and 'Search for an applicant' (dark grey).
- Manage the account:** Contains several links: 'Manage users', 'At risk applicants', 'Accredited logos', 'Key performance indicators (KPIs)', 'Approval settings', 'Departments', and 'Welsh listings'.
- Documents and templates:** Contains links: 'Overview of your organisation', 'Supporting documents', 'Contract templates', and 'Offer letter templates' (highlighted with a yellow circle containing the number 1).

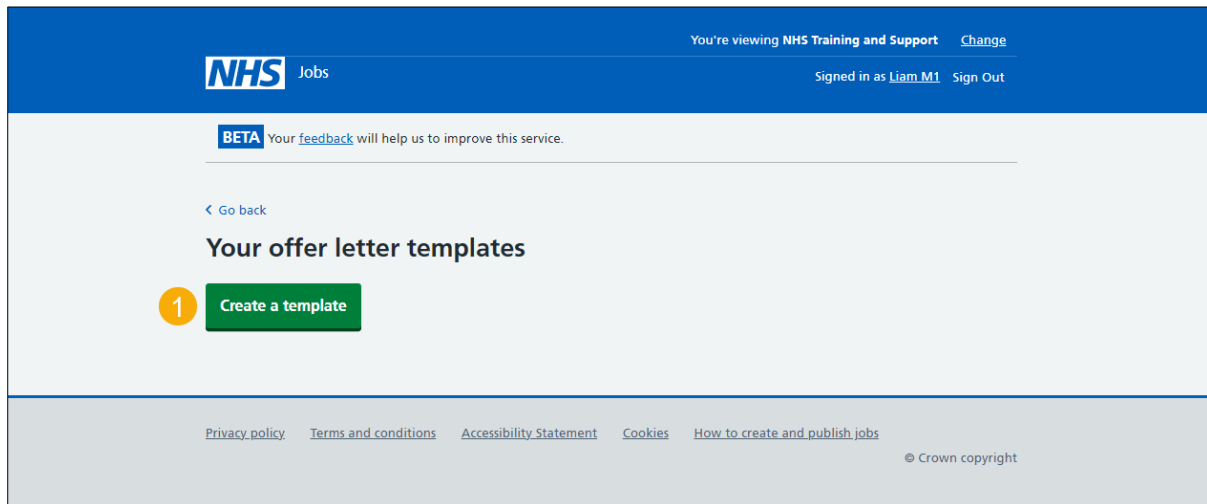
## Your offer letter templates

This page gives you instructions for how to create a template.

**Important:** In this example, you have no offer letter templates.

To create a template, complete the following step:

1. Select the ['Create a template'](#) button.



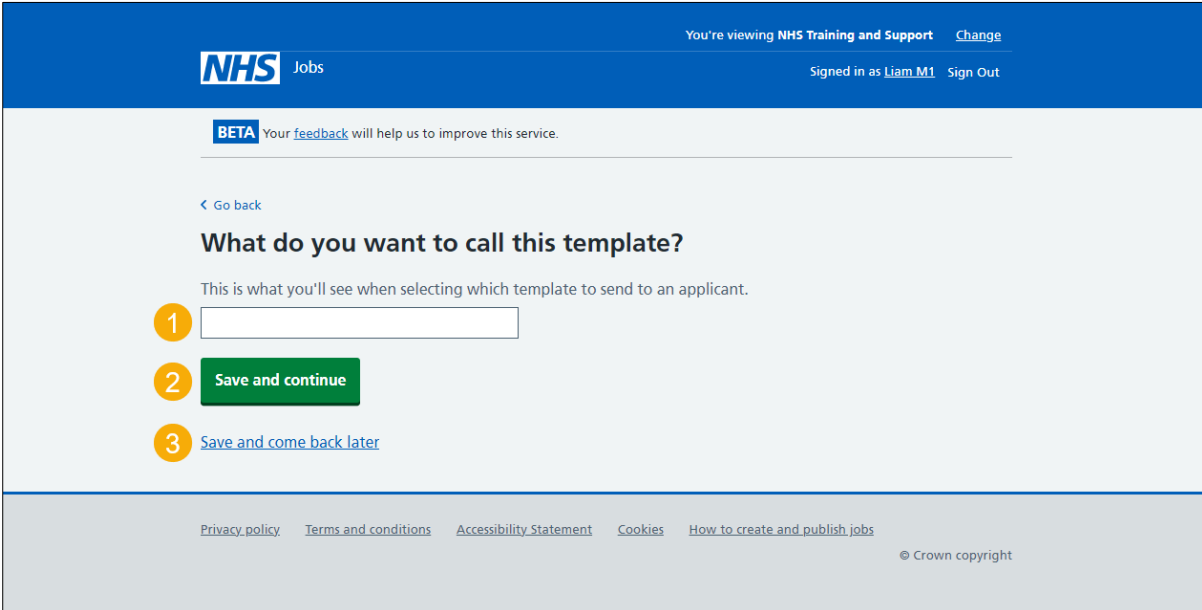
## What do you want to call this template?

This page gives you instructions for how to add a template name.

**Important:** This is what you'll see when selecting which template to send to an applicant.

To add a template name, complete the following steps:

1. In the **Template name** box, enter the details.
2. Select the ['Save and continue'](#) button.  
or
3. Select the 'Save and come back later' link.



The screenshot shows the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A '< Go back' link is visible. The main heading is 'What do you want to call this template?' followed by the instruction: 'This is what you'll see when selecting which template to send to an applicant.' There are three numbered steps: 1. A text input field. 2. A green 'Save and continue' button. 3. A blue link 'Save and come back later'. At the bottom, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice '© Crown copyright'.

If you've selected the 'Save and come back later' link, you've reached the end of this user guide.

## Add fixed term

This page gives you instructions for how to add fixed terms to your offer letter template.

**Important:** These are the terms that were entered into the job listing and appear as fixed terms at the top of the template you're creating. You can add more fixed terms. For example, the notice period or pension contributions.

To add another fixed term, complete the following steps:

1. Select the ['Add another'](#) button.
- or
2. Select the ['Save and continue'](#) button.

You're viewing [NHS Training and Support](#) [Change](#)
Signed in as [Liam M1](#) [Sign Out](#)

**BETA** Your [feedback](#) will help us to improve this service.

[Go back](#)

### Principal terms of employment

These are the terms that were entered into the job listing and appear as fixed terms at the top of the template you're creating.

Job title	job title
Location	address line 1 address line 2 address line 3 address line 4 postcode
Contract type	contract type
Working pattern	working pattern
Number of hours or sessions a week	hours or sessions
Contract duration	contract duration
Pay scheme	pay scheme
Band	band
Pay	pay more details about the pay (optional)

You can add more fixed terms. For example, the notice period or pension contributions.

**1** [Add another](#)

**2** [Save and continue](#)

[Save and come back later](#)

[Privacy policy](#) | [Terms and conditions](#) | [Accessibility Statement](#) | [Cookies](#) | [How to create and publish jobs](#)

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## Add a fixed term

This page gives you instructions for how to add a fixed term.

**Important:** You'll only see this page if you're adding a fixed term to your offer letter template. For example, Notice period and 30 days.

To add a fixed term, complete the followings steps:

1. In the **Type of term** box, enter the details.
2. In the **Details of the term** box, enter the details.
3. Select the ['Save and continue'](#) button.

The screenshot shows the NHS Jobs interface for adding a term of employment. At the top, there is a blue header with the NHS logo, 'Jobs', and user information: 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam M1' with a 'Sign Out' link. Below the header is a grey banner with a 'BETA' label and the text 'Your feedback will help us to improve this service.' A '< Go back' link is visible. The main content area is titled 'Add a term of employment'. It contains two input fields: the first is labeled 'Type of term' with the example 'Notice period' and is marked with a yellow circle containing the number '1'; the second is labeled 'Details of the term' with the example '30 days' and is marked with a yellow circle containing the number '2'. Below these fields is a green button labeled 'Save and continue', marked with a yellow circle containing the number '3'. At the bottom of the page, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', followed by the copyright notice '© Crown copyright'.

## Manage fixed term

This page gives you instructions for how to manage the fixed terms.

**Important:** In this example, a new fixed term is added: Notice period and 30 days.

To manage the fixed terms, complete the following steps:

1. Select the ['Change'](#) link (optional).
2. Select the ['Remove'](#) link (optional).
3. Select the ['Add another'](#) button (optional).  
or
4. Select the ['Save and continue'](#) button.

You're viewing [NHS Training and Support](#) [Change](#)
Signed in as [Liam M1](#) [Sign Out](#)

**BETA** Your [feedback](#) will help us to improve this service.

[Go back](#)

### Principal terms of employment

These are the terms that were entered into the job listing and appear as fixed terms at the top of the template you're creating.

Job title	<a href="#">job title</a>
Location	<a href="#">address line 1</a> <a href="#">address line 2</a> <a href="#">address line 3</a> <a href="#">address line 4</a> <a href="#">postcode</a>
Contract type	<a href="#">contract type</a>
Working pattern	<a href="#">working pattern</a>
Number of hours or sessions a week	<a href="#">hours or sessions</a>
Contract duration	<a href="#">contract duration</a>
Pay scheme	<a href="#">pay scheme</a>
Band	<a href="#">band</a>
Pay	<a href="#">pay more details about the pay (optional)</a>
Notice period	30 days <span style="float: right;">1 <a href="#">Change or Remove</a> 2</span>

You can add more fixed terms. For example, the notice period or pension contributions.

3 [Add another](#)

4 [Save and continue](#)

[Save and come back later](#)

[Privacy policy](#) [Terms and conditions](#) [Accessibility Statement](#) [Cookies](#) [How to create and publish jobs](#)

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## Add more terms and conditions to the template

This page gives you instructions for how to add more terms and conditions to the template.

**Important:** Use the **How to format your template** section to add headings, bullets, and numbered information.

To add more terms and conditions to the template, complete the following steps:

1. In the **Add more terms and conditions** box, enter the details.
2. Select the [‘Save and continue’](#) button.

**NHS** Jobs You're viewing **NHS Training and Support** [Change](#)

Signed in as **Liam.M1** | [Sign Out](#)

**BETA** Your [feedback](#) will help us to improve this service.

[Go back](#)

### Add more terms and conditions to the template

**How to format your template**

To put a heading in your template, use a hash:

- # This is a heading
- ## This is a sub-heading

To make a bullet point list, use an asterisk symbol:

- \* Bullet information A
- \* Bullet information B
- \* Bullet information C

To make a numbered list, use the number, then a full stop:

1. Numbered information A
2. Numbered information B
3. Numbered information C

**1** [Save and continue](#)

[Save and come back later](#)

[Privacy policy](#) | [Terms and conditions](#) | [Accessibility Statement](#) | [Cookies](#) | [How to create and publish jobs](#)

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## Check the details before creating the template

This page gives you instructions for how to check the details before creating the template.

**Important:** Preview the template before you create and save it. When you're satisfied that it's correct, you can save the details and create the template so it can be used to issue offer letters.

To check the details before creating the template, complete the following steps:

1. Select the ['Change'](#) link (optional).
2. Select the ['preview the template'](#) link.
3. Select the ['download the template'](#) link (optional).
4. Select the ['Create the template'](#) button.

The screenshot shows the NHS Jobs interface for creating a template. At the top, there's a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' and 'Signed in as Liam.M1 Sign Out'. Below the header, there's a 'BETA' badge and a feedback prompt. The main content area is titled 'Check the details before creating the template'. It contains a form with the following sections:

- Template name:** NHS Jobs (with a [Change](#) link).
- Additional principal terms:** Notice period: 30 days (with a [Change](#) link, highlighted with a yellow circle '1').
- Terms and conditions:** (with a [Change](#) link).

Below the form, there are instructions for entering text: '# Enter the heading here', '## Enter the sub-heading here', '\* Enter the bullet information here', and '1. Enter the numbered information here'. A section titled 'Save and create the template' explains that users should save details and create the template to issue offer letters. Below this, there's a 'You can also:' section with two links: [preview the template \(PDF, 4 KB\)](#) (highlighted with a yellow circle '2') and [download the template \(PDF, 4 KB\)](#) (highlighted with a yellow circle '3'). At the bottom of this section is a green button labeled 'Create the template' (highlighted with a yellow circle '4') and a [Save and come back later](#) link. The footer contains links for Privacy policy, Terms and conditions, Accessibility Statement, Cookies, and How to create and publish jobs, along with a copyright notice: © Crown copyright.

**Tip:** If you preview or download the template, it uses a portable document format (PDF).

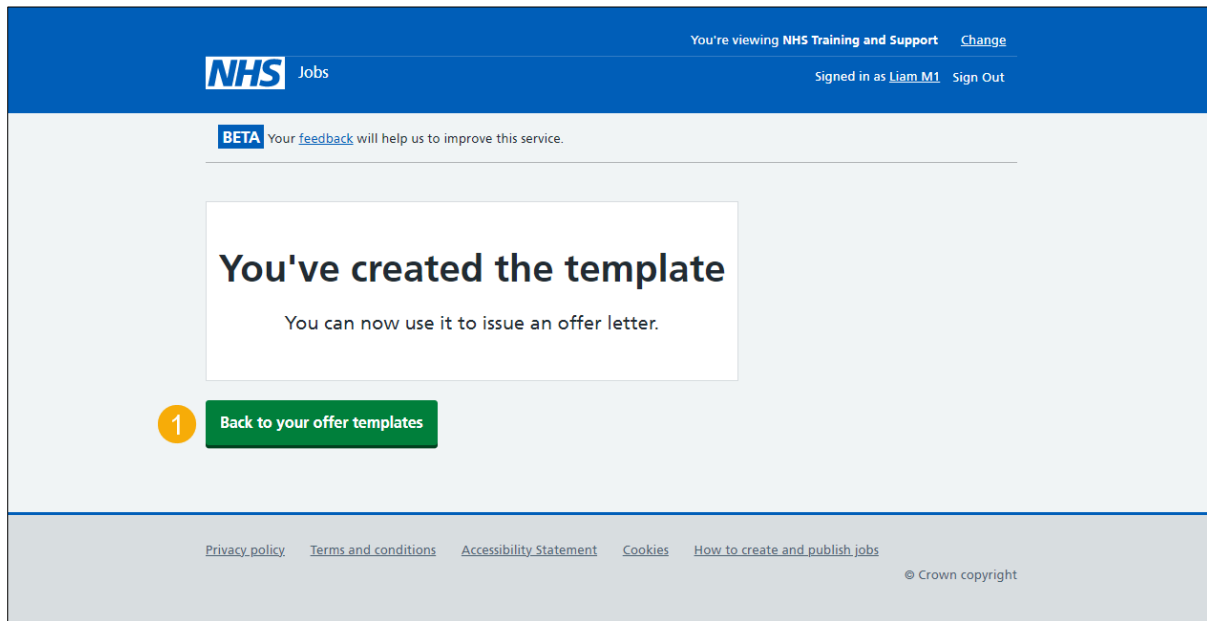
## You've created the template

This page shows confirmation you've created the template.

**Important:** You can now use it to issue an offer letter.

To go back to your offer letter templates, complete the following step:

1. Select the '[Back to your offer letter templates](#)' button.



You've created the offer letter template. If you don't want to view your offer letter templates, you've reached the end of this user guide.

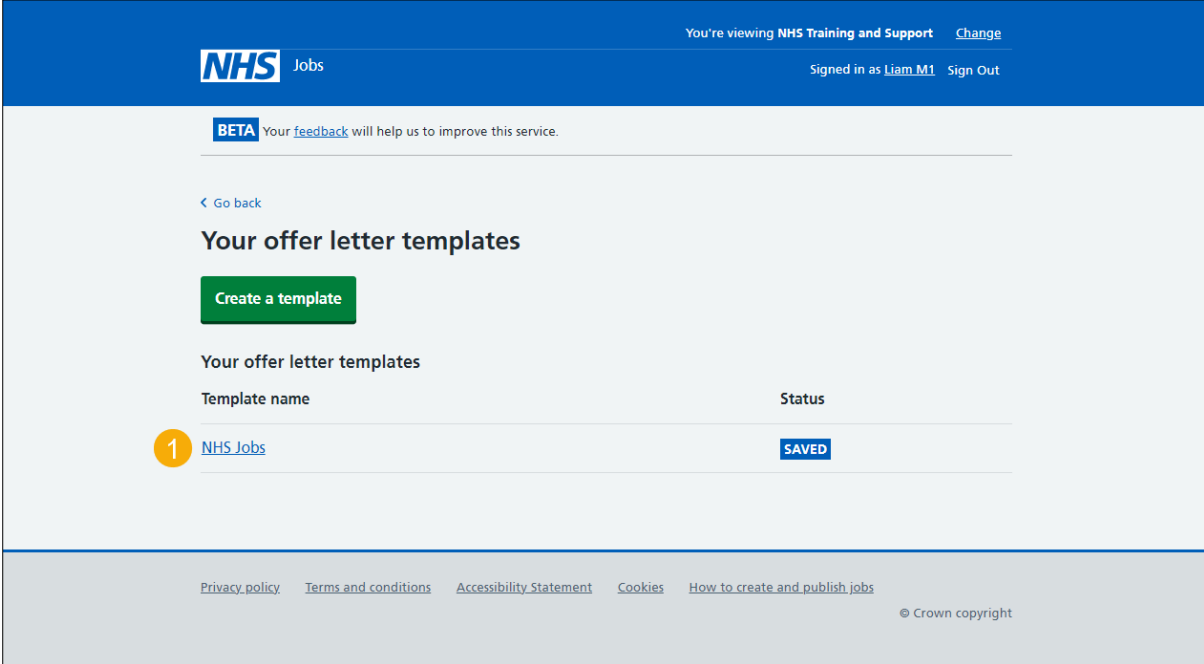
## View your offer letter templates

This page gives you instructions for how to view your offer letter templates.

**Important:** In this example, the 'NHS Jobs' template is saved.

To view your offer letter template, complete the following step:

1. Select the ['template name'](#) link.



The screenshot shows the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A 'Go back' link is visible. The main heading is 'Your offer letter templates', followed by a green 'Create a template' button. Below this is the section 'Your offer letter templates' which contains a table. The table has two columns: 'Template name' and 'Status'. There is one row with the template name 'NHS Jobs' and the status 'SAVED'. A yellow circle with the number '1' is placed over the 'NHS Jobs' link. At the bottom of the page, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with the copyright notice '© Crown copyright'.

## Manage your offer letter template

This page gives you instructions for how to manage your offer letter template.

To manage your offer letter template, complete the following steps:

1. Select the ['Change'](#) link (optional).
2. Select the ['Delete'](#) link (optional).
3. Select the ['preview the template'](#) link (optional).
4. Select the ['download the template'](#) link (optional).

The screenshot shows the NHS Jobs interface for managing an offer letter template. At the top, there's a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header, there's a 'BETA' notice: 'Your feedback will help us to improve this service.' A 'Go back' link is on the left. The main content area is titled 'NHS Jobs'. It features a table with two columns: 'Template name' and 'Additional principal terms'. The 'Template name' is 'NHS Jobs' and the 'Additional principal terms' is 'Notice period: 30 days'. Both have a 'Change' link next to them. To the right of the table is a 'What you can do' box with three links: 'Delete', 'Preview (PDF, 4 KB)', and 'Download (PDF, 4 KB)'. Below the table, there's a 'Terms and conditions' section with a 'Change' link. The page footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice: '© Crown copyright'.

**Tip:** If you preview or download the template, it uses a portable document format (PDF).

If you don't want to change or delete your offer letter template, you've reached the end of this user guide.

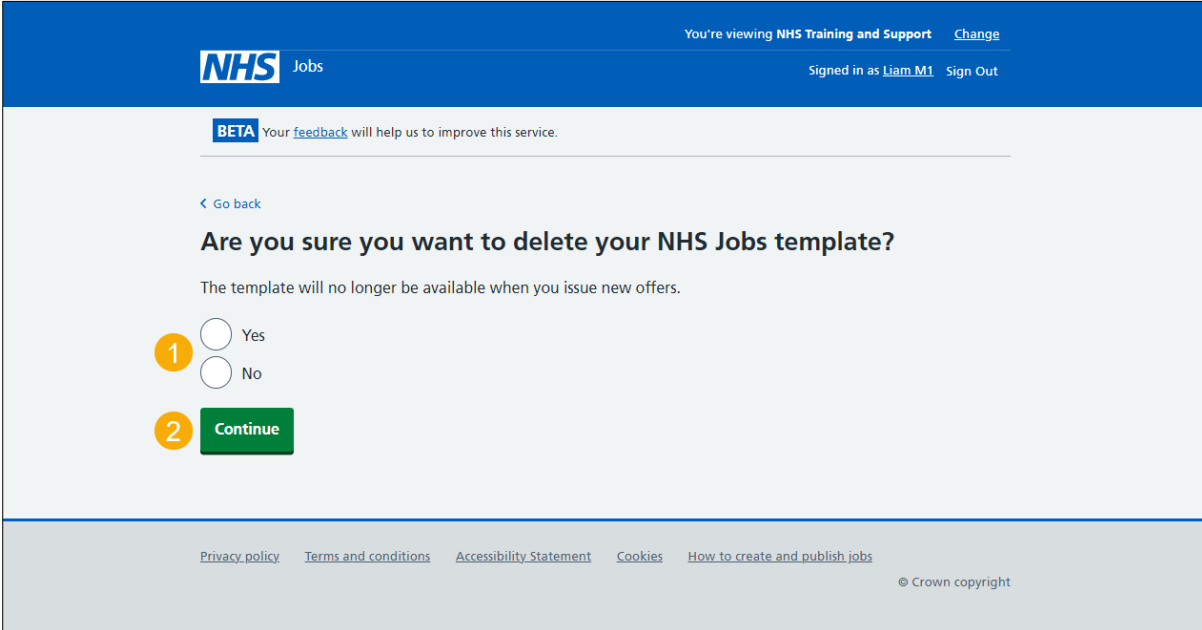
## Are you sure you want to delete your template?

This page gives you instructions to confirm if you're sure you want to delete your template.

**Important:** The template will no longer be available when you issue new offers.

To confirm if you're sure you want to delete your template, complete the following steps:

1. Select an answer:
  - ['Yes'](#)
  - 'No'
2. Select the 'Continue' button.



The screenshot shows the NHS Jobs user interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right side of the header, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A '< Go back' link is visible. The main content area has the heading 'Are you sure you want to delete your NHS Jobs template?' followed by the text 'The template will no longer be available when you issue new offers.' There are two radio button options: 'Yes' (with a '1' in a yellow circle next to it) and 'No'. Below these is a green 'Continue' button with a '2' in a yellow circle next to it. At the bottom of the page, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice '© Crown copyright'.

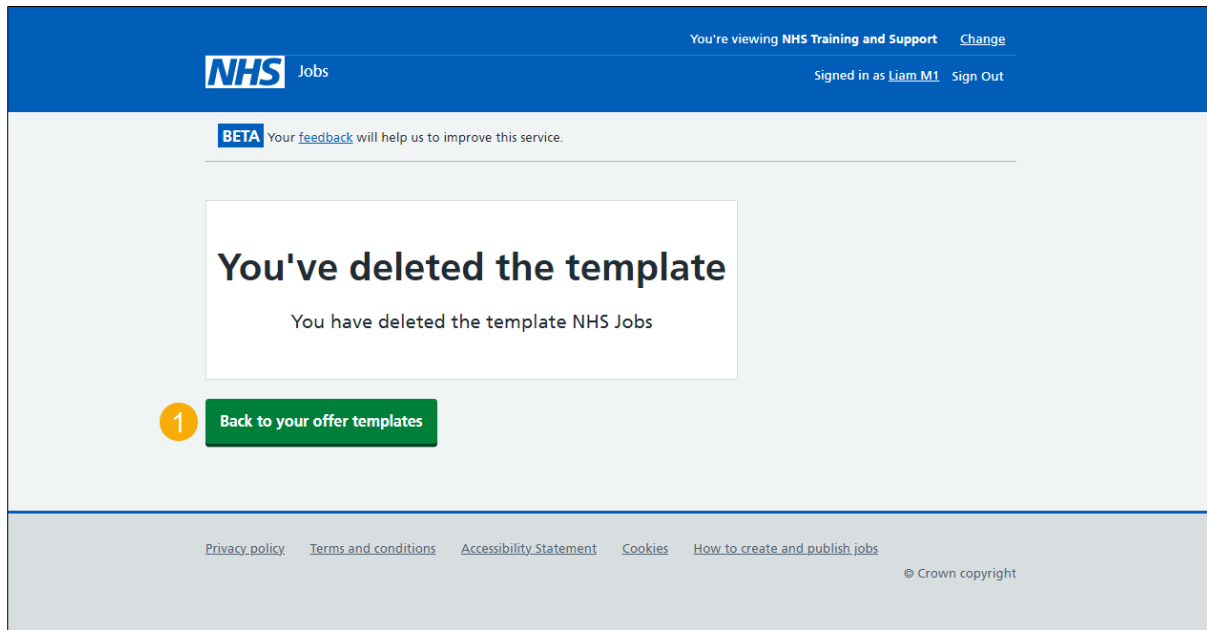
If you don't want to delete your offer letter template, you've reached the end of this user guide.

## You've deleted the template

This page shows confirmation you've deleted the template.

To go back to your offer templates, complete the following step:

1. Select the 'Back to your offer templates' button.



You've deleted the offer letter template and reached the end of this user guide.