

How to shortlist applicants for interview in NHS Jobs user guide

This guide gives you instructions for how to shortlist applicants for interview in the NHS Jobs service.

To shortlist applicants for interview, you'll:

- select then check and confirm the applicants you want to interview
- choose if you want to set up a reserve list from the remaining applicants
- invite your shortlisted applicants to interview
- send an automated email to unsuccessful applicants before inviting your shortlist to interview

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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Shortlisting

This page gives you instructions for how to access a job listing at shortlisting.

Important: You must have a job listing at the shortlisting recruitment stage to select your shortlist.

To access a job listing at shortlisting, complete the following step:

1. Select the '[Shortlisting](#)' link.

The screenshot shows the NHS BSA Training Dashboard. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS BSA Training' with a 'Change' link, and 'Signed in as NHSBSA Training' with a 'Sign Out' link. Below the header, there is a 'BETA' notice: 'Your feedback will help us to improve this service.'

The main content area is titled 'NHS BSA Training Dashboard'. It has two tabs: 'Tasks by stage' (selected) and 'Listings by user'. Below the tabs, there is a dropdown menu for 'Showing tasks for' set to 'All users'. The dashboard displays four task categories with their counts and progress bars:

Task Category	Count	Progress
Draft	57 - on track 21, overdue 36	Progress bar: 21% green, 36% red, 43% grey
Approvals	8 - on track 1, due 3, overdue 4	Progress bar: 1% yellow, 3% red, 6% grey
Published	1 - on track 0, overdue 1	Progress bar: 0% green, 1% red, 99% grey
1 Shortlisting	62 - on track 16, due 6, overdue 40	Progress bar: 16% green, 6% yellow, 40% red, 38% grey

On the right side of the dashboard, there are two 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'.

Select who to interview

This page gives you instructions for how to select who to interview.

Find the job listing and complete the following step:

1. Select the 'Job title' link to view the job listing details (optional).
2. Select the ['Select who to interview'](#) link.

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NHS Jobs

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[< Go back](#)

NHS BSA Training

Shortlisting

Showing tasks for

All users

Showing tasks

All

Shortlisting

Job title	Deadline	Scoring not completed	Task	What needs doing next
1 Training and Support Lead T1111-22-8471	15 Sep 2022 ON TRACK		Ready to select who to interview	Select who to interview 2

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Start shortlisting

This page gives you instructions for how to shortlist your applicants for interview.

Read the information on the page and complete the following step:

1. Select the [‘Start shortlisting’](#) button.

The screenshot shows the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' on the left, and 'You're viewing NHS BSA Training' with a 'Change' link on the right. Below the header, there is a 'Signed in as NHSBSA Training' and a 'Sign Out' link. A 'BETA' badge is present with the text 'Your feedback will help us to improve this service.' Below this, there is a 'Go back' link. The main heading is 'Shortlist for interview' followed by 'Shortlisting your applicants for Training and Support Lead'. A list of three steps is provided: 1. Select then check and confirm the applicants you want to interview. 2. Choose if you want to set up a reserve list from the remaining applicants. 3. Invite your shortlisted applicants to interview. A blue vertical bar highlights the text: 'You'll send an automated email to unsuccessful applicants before inviting your shortlist to interview.' At the bottom of the main content area, there is a green button with a yellow circle containing the number '1' and the text 'Start shortlisting'. The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with the copyright notice '© Crown copyright'.

Select the applicants you want to interview

This page gives you instructions for how to select the applicants you want to interview.

Important: You can choose not to shortlist any of these applicants if none of them are suitable for the job. In this example, there are 2 applicants to interview. You can choose more than one applicant.

To select the applicants you want to interview, complete the following steps:

1. Select the 'View who was on the panel' link (optional).
2. Select the 'Applicant reference ID' link to view the application details (optional).
3. Select an applicant you want to interview.
4. Select the [Continue](#) button.
- or
5. Select the [Choose not to shortlist any of these applicants](#) link.
- or
6. Select the 'Exit without changes' link.

You're viewing [NHS BSA Training](#) [Change](#)
Signed in as [NHSBSA Training](#) [Sign Out](#)

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

[Go back](#)

Shortlist for interview

Select the applicants you want to interview

1 [View who was on the panel](#)

- Lead - NHSBSA Training

Selection	Applicant reference ID	Panel	Essential	Total score
3 <input type="checkbox"/>	AR-220425-00001 2	Lead	2 out of 2	2 out of 2

4 [Continue](#)

5

You can [choose not to shortlist any of these applicants](#) if none of them are suitable for the job.

6 [Exit without changes](#)

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Check and confirm who you want to invite to interview

This page gives you instructions for how to check and confirm who you want to invite to interview.

Important: You'll only see this page if you've selected an applicant for interview. You won't be able to make changes to this listing after confirming it. You can review unsuccessful applicants to check you've made the correct selection.

To check, change and confirm who you want to invite to interview, complete the following steps:

1. Select the 'Applicant reference' link to view the applicant's details (optional).
2. Select the '[Confirm applicants for interview](#)' button.
3. Select the '[Change your selection](#)' button (optional).
4. Select the '[Review unsuccessful applicants](#)' link (optional).

You're viewing **NHS BSA Training** [Change](#)

NHS Jobs [Signed in as NHSBSA Training](#) [Sign Out](#)

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

[Go back](#)

Shortlist for interview

Check and confirm who you want to invite to interview

You will not be able to make changes to this list after confirming it.

You can review unsuccessful applicants to check you have made the correct selection.

What needs doing next

[Confirm applicants for interview](#) **2**

[Change your selection](#) **3**

[Review unsuccessful applicants](#) **4**

Applicant reference	Essential	Total score
1 AR-220301-00004	2 out of 2	2 out of 2

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Review unsuccessful applicants

This page gives you instructions for how to review the unsuccessful applicants.

Important: After you confirm your shortlist you can choose to set up a reserve list using these applicants.

To review the unsuccessful applicants, complete the following steps:

1. Select the '[change your selection](#)' link (optional).
2. Select the 'Applicant reference' link to view the applicant's details (optional).

You're viewing [NHS BSA Training](#) [Change](#)
Signed in as [NHSBSA Training](#) [Sign Out](#)

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

[< Go back](#)

Shortlist for interview

Review unsuccessful applicants

If you want to invite any of these applicants to interview you can [change your selection](#). 1

After you confirm your shortlist you can choose to set up a reserve list using these applicants.

Applicant reference	Essential	Total score
AR-220301-00005 2	2 out of 2	2 out of 2

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Once you've reviewed the unsuccessful applicants, select the '**Go back**' link.

Choose if you want a reserve list

This page gives you instructions for how to choose if you want a reserve list.

Important: Before you can invite an applicant to an interview, you will need to choose if you want a reserve list from the applicants you didn't add to your shortlist. You must send an automated email to unsuccessful applicants.

To choose if you want a reserve list, complete the following steps:

1. Select the 'Applicant name' link to view the applicant's detail (optional).
2. Select the '[Choose if you want to a reserve list](#)' button.

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Signed in as [NHSBSA Training](#) [Sign Out](#)

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[Go back](#)

Shortlist for interview

Applicants you want to invite to interview

These are the applicants you have shortlisted for interview. Before you can invite them to interview:

- choose if you want to set up a reserve list from the applicants you did not add to your shortlist
- you must send an automated email to unsuccessful applicants

Applicant reference ID	Name	Email	Phone number
AR-220301-00004	Ashleigh		

What needs doing next
Choose if you want a reserve list

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Do you want to set up a reserve list?

This page gives you instructions for how to confirm if you want to set up a reserve list.

Important: You'll be able to invite applicants from this reserve list to interview. If you decide not to set up a reserve list now you will not be able to set one up later.

To confirm if you want to set up a reserve list, complete the following steps:

1. Select the 'How reserve lists work' link (optional).
2. Select an answer:
 - ['Yes'](#)
 - ['No'](#)
3. Select the 'Save and continue' button.

You're viewing [NHS BSA Training](#) [Change](#)

NHS Jobs [Signed in as NHSBSA Training](#) [Sign Out](#)

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[Go back](#)

Reserve list

Do you want to set up a reserve list?

You'll be able to invite applicants from this reserve list to interview. If you decide not to set up a reserve list now you will not be able to set one up later.

1 [How reserve lists work](#)

You can add any applicants that you did not shortlist for an interview, to your reserve list. We will notify applicants that they have been added to your reserve list.

You can use your reserve list after you have invited your shortlisted applicants to interview.

You can use the list if applicants decline an interview or if you want to interview more applicants.

If you do not use your reserve list you'll be able to send an automated email to the applicants telling them they have been unsuccessful.

2 Yes No

3 [Save and continue](#)

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Select the applicants you want to add to your reserve list

This page gives you instructions for how to select the applicants you want to add to your reserve list.

Important: You'll only see this page if you're setting up a reserve list. In this example, there is 1 applicant. If there are more applicants, you can add them to a reserve list.

To select the applicants, you want to add to your reserve list, complete the following steps:

1. Select the 'View who was on the panel' link (optional).
2. Select the 'Applicant reference ID' link to view the applicant's details (optional).
3. Select an applicant to add to your reserve list.
4. Select the [Continue](#) button.
- or
5. Select the [I no longer need a reserve list](#) button (optional).

You're viewing [NHS BSA Training](#) [Change](#)
Signed in as [NHSBSA Training](#) [Sign Out](#)

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

[Go back](#)

Reserve list

Select the applicants you want to add to your reserve list

1 [View who was on the panel](#)

- Lead - NHSBSA Training

Selection	Applicant reference ID	Panel	Essential	Total score
3 <input type="checkbox"/>	AR-220301-00005 2	Lead	2 out of 2	2 out of 2

4 [Continue](#)

5 [I no longer need a reserve list](#)

[Exit without changes](#)

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Check and confirm the reserve list

This page gives you instructions for how to check and confirm the reserve list.

Important: You won't be able to make changes to this reserve list after confirming it. The applicants that you didn't select will be sent an unsuccessful email.

To check and confirm the reserve list, complete the following steps:

1. Select the 'Applicant reference ID' link to view the applicant's details (optional).
2. Select the 'View applicants selected for interview' link.
3. Select the '[Change your selection](#)' button.
4. Select the '[Confirm the reserve list](#)' button.

You're viewing [NHS BSA Training](#) [Change](#)
Signed in as [NHSBSA Training](#) [Sign Out](#)

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

[< Go back](#)

Reserve list

Check and confirm the reserve list

You will not be able to make changes to this reserve list after confirming it.

The applicants that you did not select will be sent an unsuccessful email.

What needs doing next

[Confirm the reserve list](#) 4

[Change your selection](#) 3

[View applicants selected for interview](#) 2

Applicant reference	Essential	Total score
1 AR-220301-00005	2 out of 2	2 out of 2

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Applicants you want to invite to interview with a reserve list

This page gives you instructions for how to invite applicants to interview with a reserve list.

Important: You'll only see this page if you've setup a reserve list. You can now invite your shortlisted applicants to interview. You can download the shortlisted applications to view and print them if you need to.

To do a task, complete the following steps:

1. Select the 'Applicant reference ID' link to view the applicant's details (optional).
2. Select 'Invite to interview' button (optional).
3. Select the 'Download applications' button (optional).
4. Select the 'View reserve list applicants' link (optional).

The screenshot shows the NHS Jobs interface. At the top, it says 'You're viewing NHS BSA Training' and 'Signed in as NHSBSA Training'. Below that is a 'BETA' notice. The main heading is 'Shortlist for interview' and 'Applicants you want to invite to interview'. A sidebar titled 'What needs doing next' contains three items: 'Invite to interview' (button, callout 2), 'Download applications' (button, callout 3), and 'View reserve list applicants' (link, callout 4). The main content area has a table with columns: Applicant reference ID, Name, Email, and Phone number. The first row shows 'AR-220301-00004', 'Ashleigh', and a redacted email and phone number. A callout '1' points to the 'Applicant reference ID' link.

Applicant reference ID	Name	Email	Phone number
AR-220301-00004	Ashleigh	[Redacted]	[Redacted]

Tip: If you download the applications, it uses a portable document format (PDF).

To find out how to invite your applicants to interview, go to the '**How to invite your shortlist to interview in NHS Jobs**' user guide or video from the '**Invite to interview**' section of the '[Help and support for employers](#)' webpage.

You've shortlisted applicants you want to invite to interview with a reserve list and reached the end of this user guide.

Applicants you want to invite to interview without a reserve list

This page gives you instructions for how to invite applicants to interview without a reserve list.

Important: You'll only see this page if you haven't setup a reserve list. These are the applicants you have shortlisted for interview. Before you invite applicants to interview you must send an automated email to unsuccessful applicants. This will notify them they are not invited to interview.

To do a task, complete the following steps:

1. Select the 'Applicant name' link to view the applicant's details (optional).
2. Select the ['Email unsuccessful applicants'](#) button.

NHS Jobs

You're viewing [NHS BSA Training](#) [Change](#)

Signed in as [NHSBSA Training](#) [Sign Out](#)

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

[Go back](#)

Shortlist for interview

Applicants you want to invite to interview

These are the applicants you have shortlisted for interview.

Before you invite applicants to interview you must send an automated email to unsuccessful applicants. This will notify them that they are not invited to interview.

Applicant reference ID	Name	Email	Phone number
AR-220302-00005	Ashleigh		

What needs doing next

[Email unsuccessful applicants](#)

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Do you want to provide an email address for unsuccessful applicants to get feedback?

This page gives you instructions for how to confirm if you want to provide an email address for unsuccessful applicants to get feedback.

To confirm if you want to provide an email address for unsuccessful applicants to get feedback, complete the following steps:

1. Select an answer:
 - [‘Yes’](#)
 - [‘No’](#)
2. Select the ‘Save and continue’ button

The screenshot shows the NHS Jobs application interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing' followed by a dropdown menu and a 'Change' link. Below that, it says 'Signed in as NHS BSA Training' and a 'Sign Out' link. The main content area has a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' Below this is a 'Go back' link. The question is 'Do you want to provide an email address for unsuccessful applicants to get feedback?'. There are two radio buttons: 'Yes' and 'No'. The 'Yes' radio button is selected. Below the radio buttons is a green 'Save and continue' button. At the bottom, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs'. In the bottom right corner, it says '© Crown copyright'.

Give an email address for applicant feedback

This page gives you instructions for how to give an email address for applicant feedback.

Important: You'll only see this page if you're adding an email address for applicant feedback. This will be included in the email that will be sent to unsuccessful applicants.

To add an email address, complete the following steps:

1. In the **Email address** box, enter the details.
2. Select the ['Save and continue'](#) button.

The screenshot shows the NHS Jobs website interface. At the top, there is a blue header with the NHS logo and 'Jobs' text on the left, and 'You're viewing' followed by a dropdown menu and a 'Change' link on the right. Below the header, it says 'Signed in as NHS BSA Training' with a 'Sign Out' link. A 'BETA' badge is present with the text 'Your feedback will help us to improve this service.' Below this is a 'Go back' link. The main heading is 'Unsuccessful applicants' followed by 'Give an email address for applicant feedback'. A sub-heading states 'This will be included in the email that will be sent to unsuccessful applicants.' There is a text input field with a '1' in a yellow circle to its left. Below the input field is a green button with a '2' in a yellow circle and the text 'Save and continue'. 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'. The footer text is '© Crown copyright'.

Are you sure you do not want to shortlist any applicants?

This page gives you instructions for how to confirm you don't want to shortlist any applicants.

Important: You'll only see this page if you're not shortlisting any applicants for interview. If you choose to continue without shortlisting, you'll email your unsuccessful applicants. You can then reuse the information from this advert to create a new one.

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

The screenshot shows a web page with a blue header. On the left is the NHS logo and 'Jobs'. On the right, it says 'You're viewing NHS BSA Training' with a 'Change' link, and 'Signed in as NHSBSA Training' with a 'Sign Out' link. Below the header is a grey bar with 'BETA Your feedback will help us to improve this service.' and a 'Go back' link. The main content area has the heading 'Complete shortlisting' and the question 'Are you sure you do not want to shortlist any applicants?'. Below this is explanatory text: 'If you choose to continue without shortlisting, you'll email your unsuccessful applicants. You can then reuse the information from this advert to create a new one.' There are two radio buttons: '1 Yes' and '2 No'. Below the radio buttons is a green 'Continue' button. At the bottom, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', followed by '© Crown copyright'.

You've decided not to interview any applicants

This page shows confirmation you've decided not to interview any applicants.

Important: You'll only see this page if you haven't shortlisted any applicants for interview. You'll now be asked to email unsuccessful applicants to let them know they have not been invited to interview.

To email unsuccessful applicants, complete the following step:

1. Select the [Continue](#) button.

The screenshot shows the NHS Jobs application interface. At the top, there is a blue header with the NHS logo and 'Jobs' text on the left, and 'You're viewing' followed by a dropdown menu and a 'Change' link on the right. Below the header, it says 'Signed in as NHS BSA Training' with a 'Sign Out' link. A 'BETA' badge is present with the text 'Your feedback will help us to improve this service.' The main content area features a large white box with the heading 'You have decided not to interview any applicants for Training and Support Lead' and the reference number 'A0022-21-8458'. Below this, a section titled 'What happens next' explains that the user will be asked to email unsuccessful applicants. A green 'Continue' button with a yellow '1' in a circle is positioned below the text. The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a '© Crown copyright' notice.

Email your unsuccessful applicants

This page gives you instructions for how to email your unsuccessful applicants.

Important: In this example, there's 1 unsuccessful applicant. The applicant's first name, the employer's name, and job title are added to the email template automatically by the NHS Jobs service.

To email your unsuccessful applicants, complete the following steps:

1. Select the '[Send rejections](#)' button.

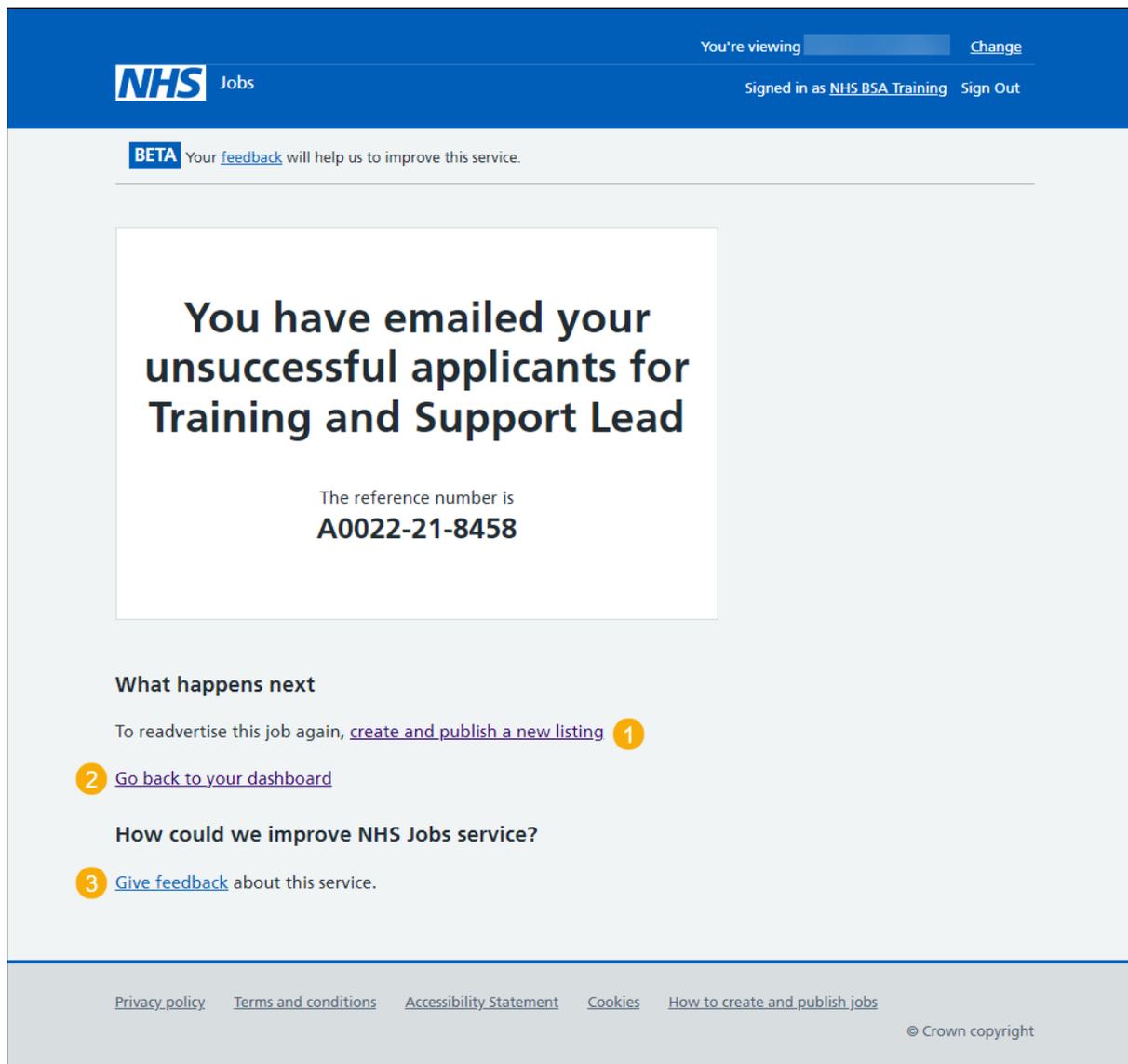
The screenshot displays the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' text on the left, and user information on the right: 'You're viewing NHS BSA Training' with a 'Change' link, and 'Signed in as NHSBSA Training' with a 'Sign Out' link. Below the header, a 'BETA' badge is followed by the text 'Your feedback will help us to improve this service.' A navigation link '< Go back' is visible. The main heading is 'Unsuccessful applicants' followed by 'Email your 1 unsuccessful applicants'. A vertical blue bar on the left indicates the email preview content, which includes: '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,', and 'The NHS Jobs Team'. Below the preview is a green button with a yellow circle containing the number '1' and the text 'Send rejections'. 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', along with the copyright notice '© Crown copyright'.

You've emailed your unsuccessful applicants

This page shows confirmation you've emailed your unsuccessful applicants.

To do a task, complete the following steps:

1. Select the 'create and publish a new listing' link (optional).
2. Select the 'Return to your job listings' link (optional).
3. Select the 'Give feedback' link (optional).



The screenshot shows the NHS Jobs website interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing' followed by a dropdown menu and a 'Change' link. Below that, it says 'Signed in as NHS BSA Training' and 'Sign Out'. A 'BETA' badge is present with the text 'Your feedback will help us to improve this service.' The main content area features a large white box with the heading 'You have emailed your unsuccessful applicants for Training and Support Lead'. Below this, it states 'The reference number is A0022-21-8458'. Underneath, there are three numbered steps: 1. 'To readvertise this job again, [create and publish a new listing](#)'; 2. '[Go back to your dashboard](#)'; and 3. 'How could we improve NHS Jobs service? [Give feedback](#) about this service.' At the bottom, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice '© Crown copyright'.

To find out how to invite your applicants to interview, go to the '**How to invite your shortlist to interview in NHS Jobs**' user guide or video from the '**Invite to interview**' section of the '[Help and support for employers](#)' webpage.

You've shortlisted the applicants you want to invite to interview, emailed your unsuccessful applicants and reached the end of this user guide.