

## How to manage contract templates in NHS Jobs user guide

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

You can use contract templates when issuing an online contract offer to an applicant.

In your organisations account, you can:

- create a contract template
- preview a contract template
- change a contract template
- delete a contract 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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## Contract templates

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

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

To manage your contract templates, complete the following step:

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

The screenshot shows the NHS Jobs dashboard for NHSBSA Lee UAT. The top navigation bar includes the NHS logo, the text 'Jobs', and user information: 'You're viewing NHSBSA Lee UAT' with a 'Change' link, and 'Signed in as Lee Mapes' with a 'Sign Out' link. A toggle switch for 'Show tasks for all accounts' is visible. A 'BETA' banner states 'Your feedback will help us to improve this service.' The main content area is titled 'NHSBSA Lee UAT Dashboard' and has two tabs: 'Tasks by stage' (selected) and 'Listings by user'. Below the tabs, a dropdown menu shows 'Showing tasks for All users'. The main content is a table of task stages with counts and progress bars:

Task Stage	Count	Progress
<a href="#">Draft</a>	11	Progress bar (green)
<a href="#">Published</a>	2	Progress bar (green)
<a href="#">Shortlisting</a>	5 - on track 0, overdue 5	Progress bar (red)
<a href="#">Interviews</a>	8	Progress bar (green)
<a href="#">Ready to offer</a>	8 - on track 7, overdue 1	Progress bar (green)
<a href="#">Conditional offers</a>	13 - on track 3, overdue 10	Progress bar (red)
<a href="#">Pre-employment checks</a>	0	Progress bar (grey)

The right sidebar contains three sections:

- What you can do:**
  - [Create a job listing](#) (green button)
  - [Search for a listing](#) (dark grey button)
  - [Search for an applicant](#) (dark grey button)
- Manage the account:**
  - [Manage users](#)
  - [At risk applicants](#)
  - [Accredited logos](#)
  - [Key performance indicators \(KPIs\)](#)
  - [Approval settings](#)
  - [Departments](#)
  - [Welsh listings](#)
- Documents and templates:**
  - [Overview of your organisation](#)
  - [Supporting information library](#)
  - [Contract templates](#) (with a yellow circle containing the number 1)
  - [Offer letter templates](#)

## Your contract templates

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

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

To create a template, complete the following step:

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

The screenshot displays the NHS Jobs interface. At the top, a blue navigation bar contains the NHS logo and the word 'Jobs'. On the right side of this bar, it indicates the user is viewing 'NHS Training and Support' and is signed in as 'Liam.M1', with options to 'Change' or 'Sign Out'. Below the navigation bar, a 'BETA' badge is present, followed by a message: 'Your feedback will help us to improve this service.' A 'Go back' link is located below this message. The main content area features the heading 'Your contract templates' and the text 'You have no contract templates'. A large green button with a yellow circle containing the number '1' is labeled 'Create a template'. The footer contains several links: 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with the text '© Crown copyright'.

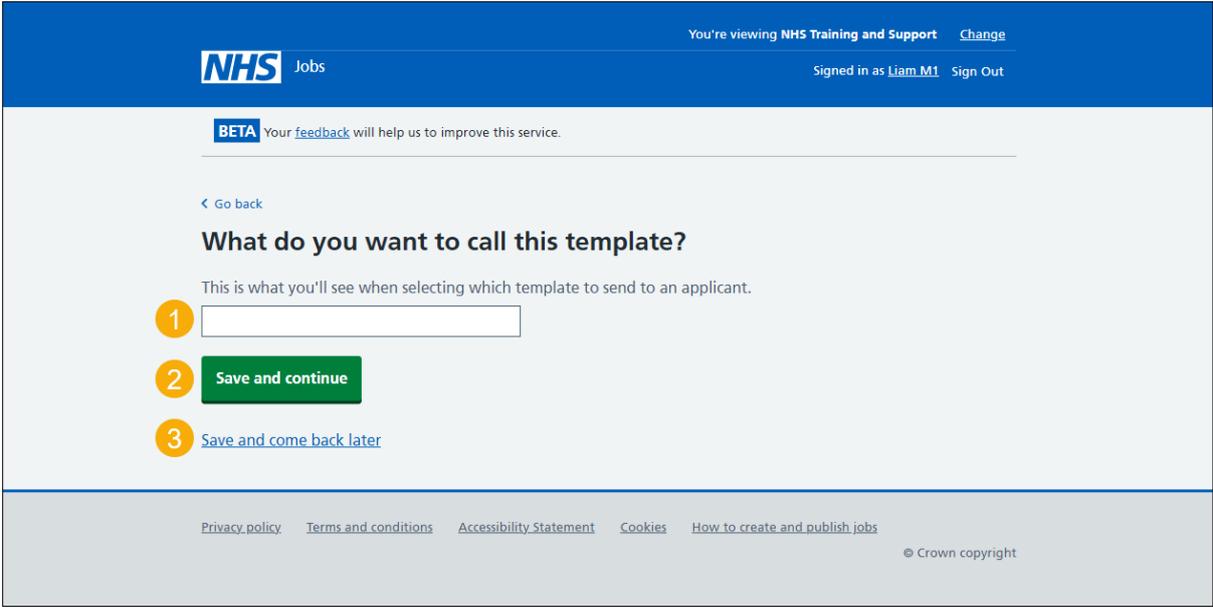
## What do you want to call this template?

This page gives you instructions for how 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.

## Which type of agreement is this template for?

This page gives you instructions for how to confirm the type of agreement for this template.

To confirm the type of agreement for this template, complete the following steps:

1. Select an answer.
2. Select the '[Save and continue](#)' button.

The screenshot shows the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' text on the left, and 'You're viewing NHS Training and Support' with a 'Change' link on the right. Below the header, a 'Signed in as Liam.M1' and 'Sign Out' link are visible. A 'BETA' badge with the text 'Your feedback will help us to improve this service.' is present. A '< Go back' link is located above the main heading 'Which type of agreement is this template for?'. Below the heading, there are four radio button options: 'An addendum to an existing contract', 'A contract of employment', 'An internal secondment', and 'An external secondment'. A yellow circle with the number '1' is next to the 'A contract of employment' option. Below the options is a green button with a yellow circle containing the number '2' and the text 'Save and continue'. Below the button is a link that says 'Save and come back later'. 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 text '© Crown copyright'.

## Add fixed term

This page gives you instructions for how to add fixed terms to your contract 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
Contract duration	contract duration
Pay scheme	pay scheme
Band	band
Pay	pay
Working pattern	working pattern
Number of hours or sessions a week	hours or sessions
Start date	start date

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 add a fixed term.

**Important:** You'll only see this page if you're adding a fixed term to your contract 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, a 'BETA' banner states 'Your feedback will help us to improve this service.' A 'Go back' link is visible. The main heading is 'Add a term of employment'. The form consists of three numbered steps: 1. 'Type of term' with a subtext 'For example, Notice period' and an input field. 2. 'Details of the term' with a subtext 'For example, 30 days' and an input field. 3. A green 'Save and 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'.

## 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	job title
Location	address line 1 address line 2 address line 3 address line 4 postcode
Contract type	contract type
Contract duration	contract duration
Pay scheme	pay scheme
Band	band
Pay	pay
Working pattern	working pattern
Number of hours or sessions a week	hours or sessions
Start date	start date
Notice period	30 days

1 [Change or Remove](#) 2

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

1

**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

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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## 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 contracts.

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

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

The screenshot shows the NHS Jobs interface. At the top, it says "You're viewing NHS Training and Support" and "Signed in as Liam M1". The main heading is "Check the details before creating the template". Below this is a table with the following details:

Template name	NHS Jobs	<a href="#">Change</a>
Type of agreement	A contract of employment	<a href="#">Change</a>
Additional principal terms	Notice period	<a href="#">Change</a> <b>1</b>
Terms and conditions		<a href="#">Change</a>

Below the table, there are instructions for entering heading, sub-heading, bullet points, and numbered information. A section titled "Save and create the template" contains a link to "preview the contract (PDF, 4 KB)" with a yellow circle "2" and a green "Create the template" button with a yellow circle "3". A "Save and come back later" link is also present.

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

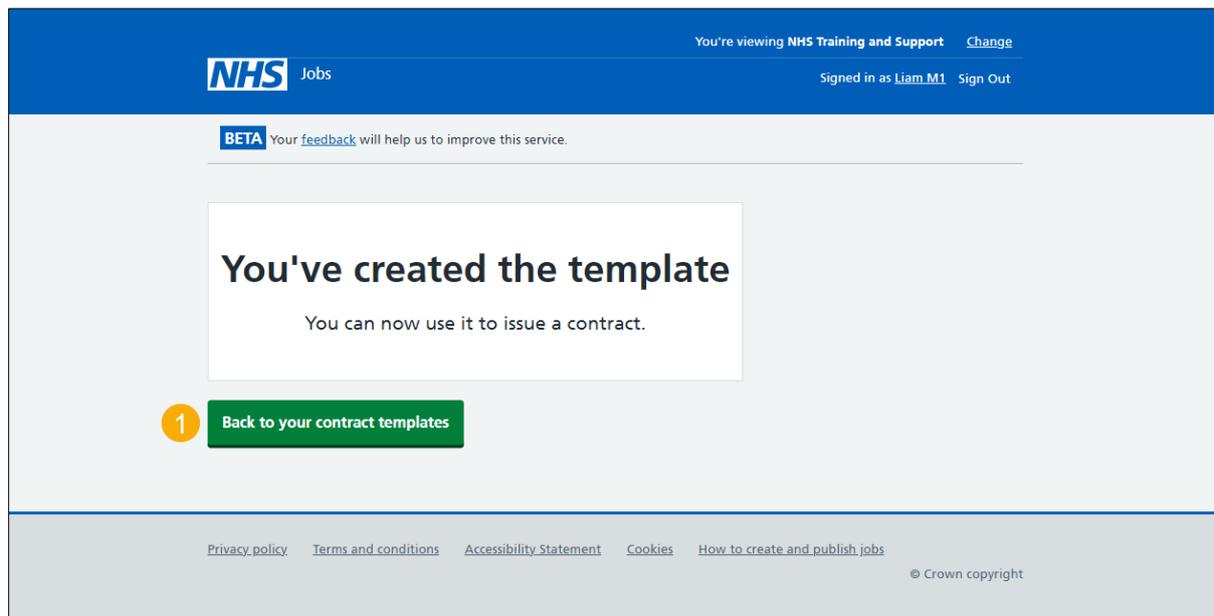
## You've created the template

This page shows confirmation you've created the template.

**Important:** You can now use it to issue a contract.

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

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



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

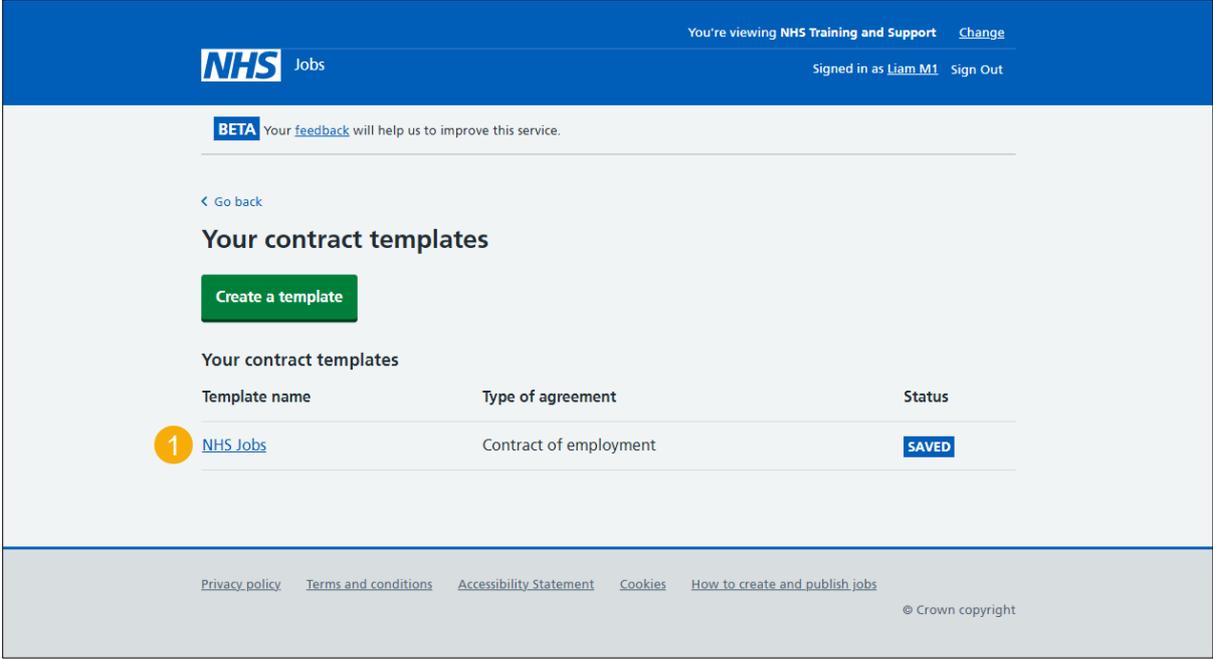
## View your contract templates

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

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

To view your contract 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 contract templates', followed by a green 'Create a template' button. Below this is a table titled 'Your contract templates' with columns for 'Template name', 'Type of agreement', and 'Status'. The table contains one row: 'NHS Jobs' (with a circled '1' next to it), 'Contract of employment', and 'SAVED'. 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'.

Template name	Type of agreement	Status
<a href="#">NHS Jobs</a>	Contract of employment	SAVED

## Manage the contract template

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

To manage your contract template, complete the following steps:

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

The screenshot shows the NHS Jobs interface. 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'. Below the header, there's a 'BETA' notice. The main content area has a 'Go back' link and the title 'NHS Jobs'. Below this is a table with the following rows:

Template name	NHS Jobs	<a href="#">Change</a>
Type of agreement	A contract of employment	<a href="#">Change</a>
Additional principal terms	Notice period	<a href="#">Change</a>
Terms and conditions		<a href="#">Change</a>

Below the table, there are instructions for entering content: '# Enter the heading here.', '## Enter the sub-heading here.', '\* Enter the bullet information here.', and '1. Enter the numbered information here.' A 'What you can do' box is overlaid on the right, containing 'Delete' (2) and 'Preview (PDF, 4 KB)' (3). A '1' is also overlaid on the 'Change' link for 'Additional principal terms'.

At the bottom, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs'. The footer includes '© 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 contract template, you've reached the end of this user guide.

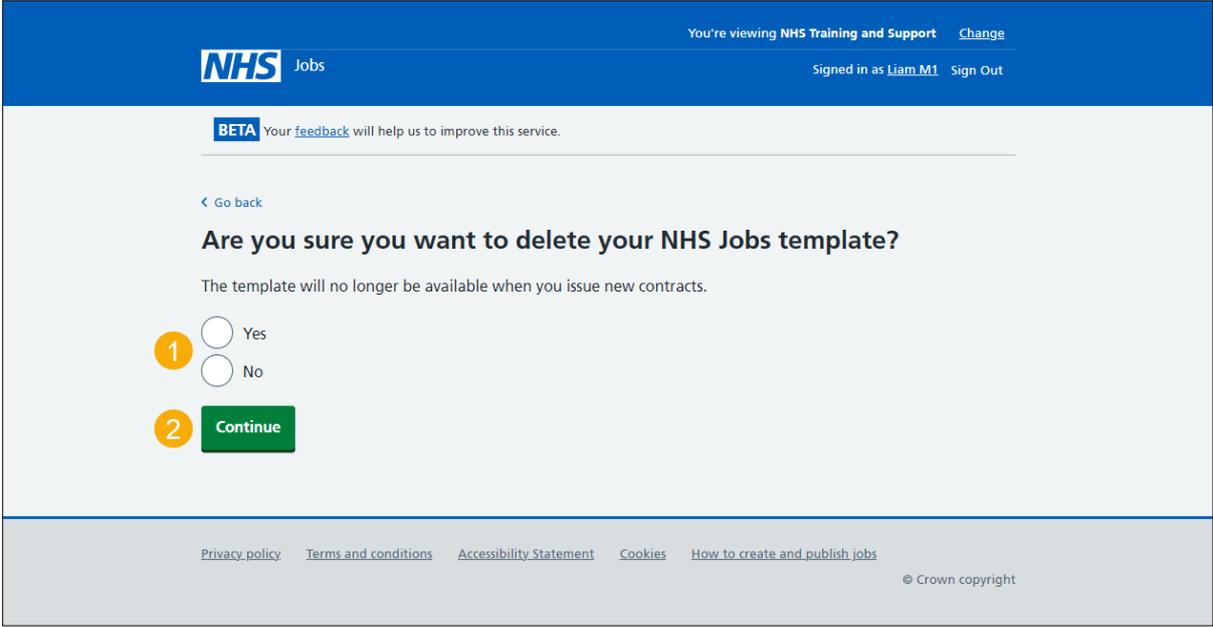
## Are you sure you want to delete your template?

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 contracts.

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 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 Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' 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 '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 contracts.' There are two radio buttons: '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, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with '© Crown copyright'.

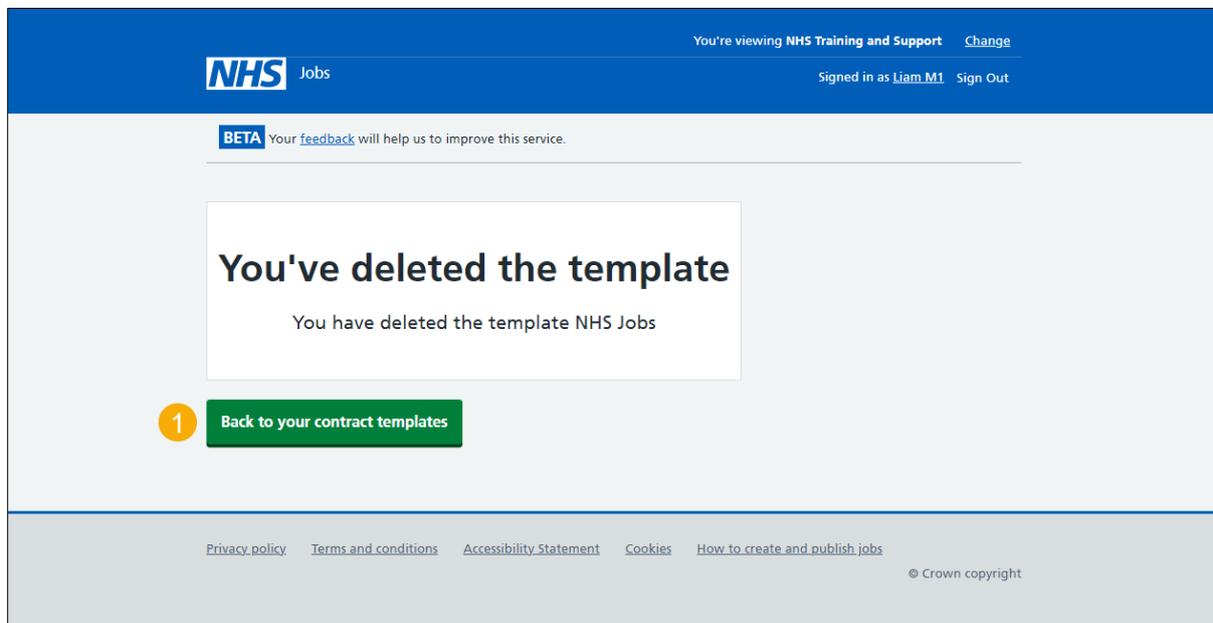
If you don't want to delete your contract template, you've reached the end of this user guide.

## You've deleted the contract template

This page shows confirmation you've deleted the contract template.

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

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



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