

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 displays the NHS Jobs dashboard for NHSBSA Lee UAT. At the top, the user is signed in as Lee Mapes. The dashboard is divided into several sections:

- Header:** NHS Jobs logo, user name, and sign-out options.
- Navigation:** 'Tasks by stage' and 'Listings by user' tabs.
- Task Summary:** A table showing the number of tasks in various stages, with progress bars and status indicators (on track, overdue).
- What you can do:** Action buttons for creating listings, searching for listings, and searching for applicants.
- Manage the account:** A list of links for account management, including users, applicants, logos, KPIs, settings, departments, and Welsh listings.
- Documents and templates:** A list of links for organizational documents, with a notification badge on the 'Contract templates' link.

Task Stage	Count	Status
Draft	11	On track
Published	2	On track
Shortlisting	5	on track 0, overdue 5
Interviews	8	On track
Ready to offer	8	on track 7, overdue 1
Conditional offers	13	on track 3, overdue 10
Pre-employment checks	0	On track

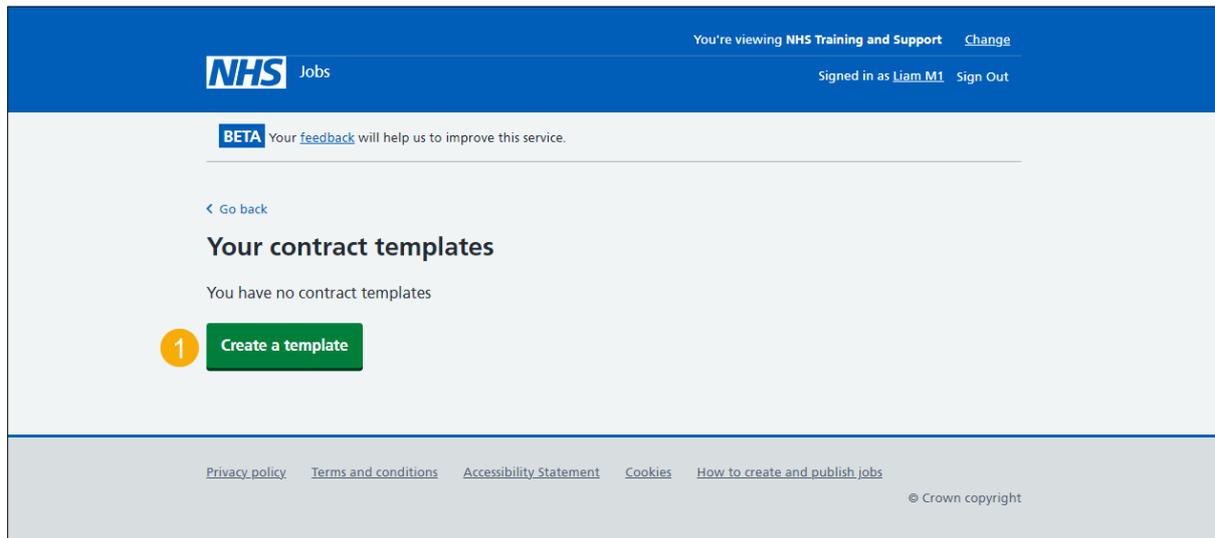
Your contract templates

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.



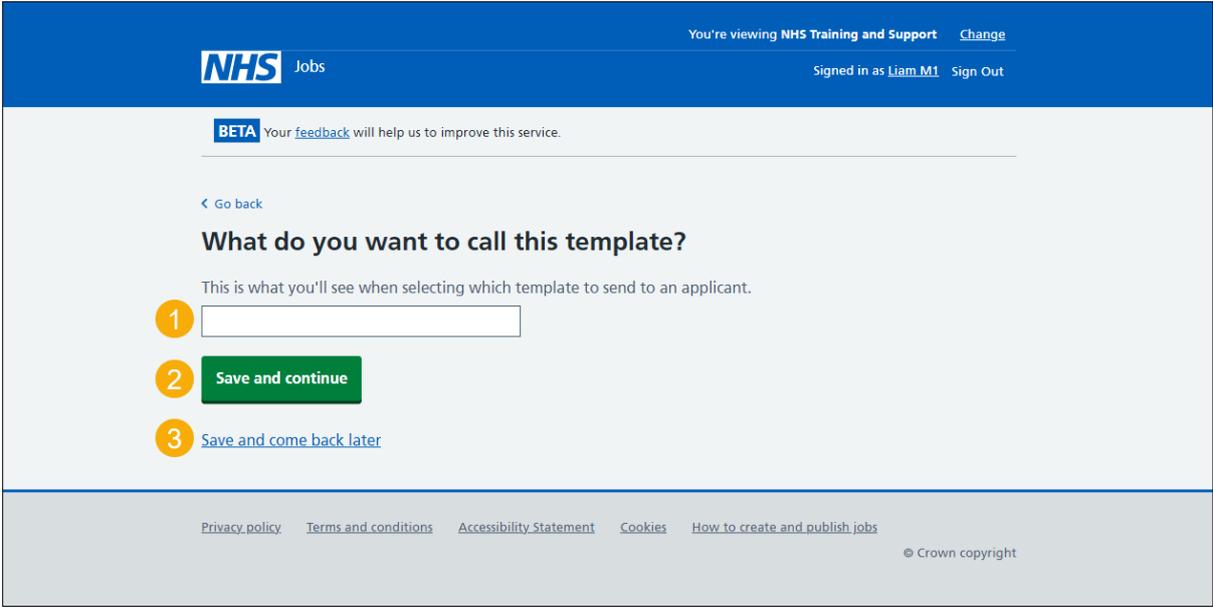
What do you want to call this template?

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'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' 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 application 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 question. The question is 'Which type of agreement is this template for?'. 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'. A link 'Save and come back later' is positioned below the button. 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'.

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 is a grey banner with 'BETA Your feedback will help us to improve this service.' and a 'Go back' link. The main content area is titled 'Add a term of employment' and contains two input fields. The first field is labeled 'Type of term' with the example 'Notice period' and is marked with a '1' in a yellow circle. The second field is labeled 'Details of the term' with the example '30 days' and is marked with a '2' in a yellow circle. Below the second field is a green button labeled '3 Save and continue'. 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 text '© 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

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

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 for creating a template. 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	Change
Type of agreement	A contract of employment	Change
Additional principal terms	Notice period	Change 1
Terms and conditions		Change

Below the table, there are instructions for entering heading, sub-heading, bullet points, and numbered information. A section titled 'Save and create the template' explains the next steps. A yellow circle with the number '2' highlights the ['preview the contract \(PDF, 4 KB\)'](#) link. At the bottom, a green button labeled 'Create the template' is highlighted with a yellow circle with the number '3'. A link 'Save and come back later' is also visible.

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

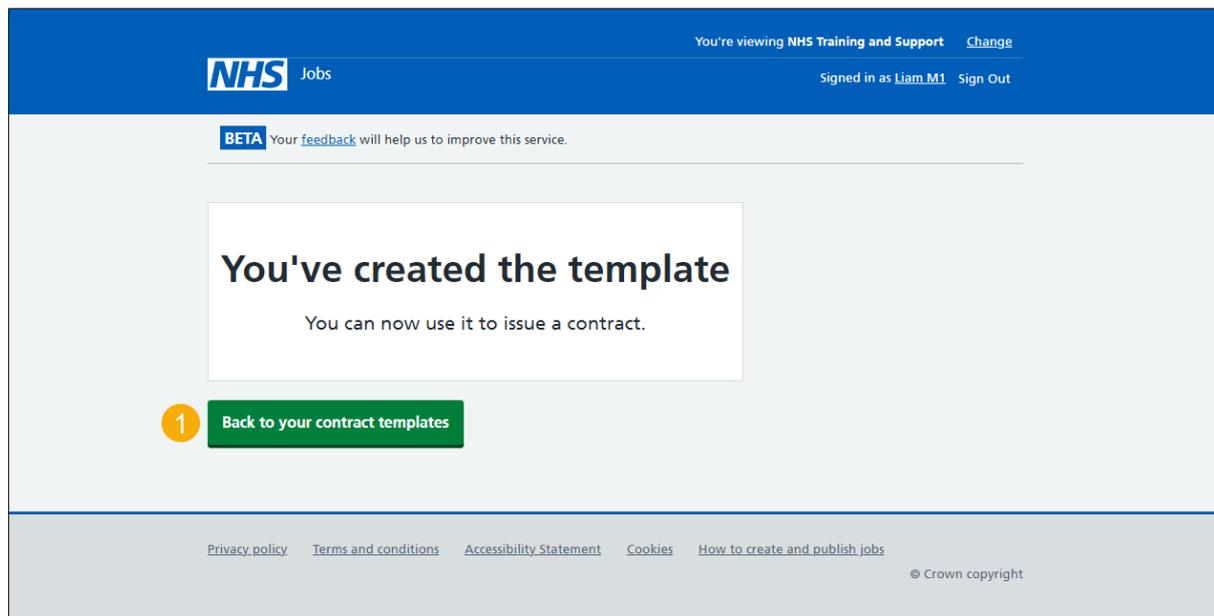
You've created the template

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.

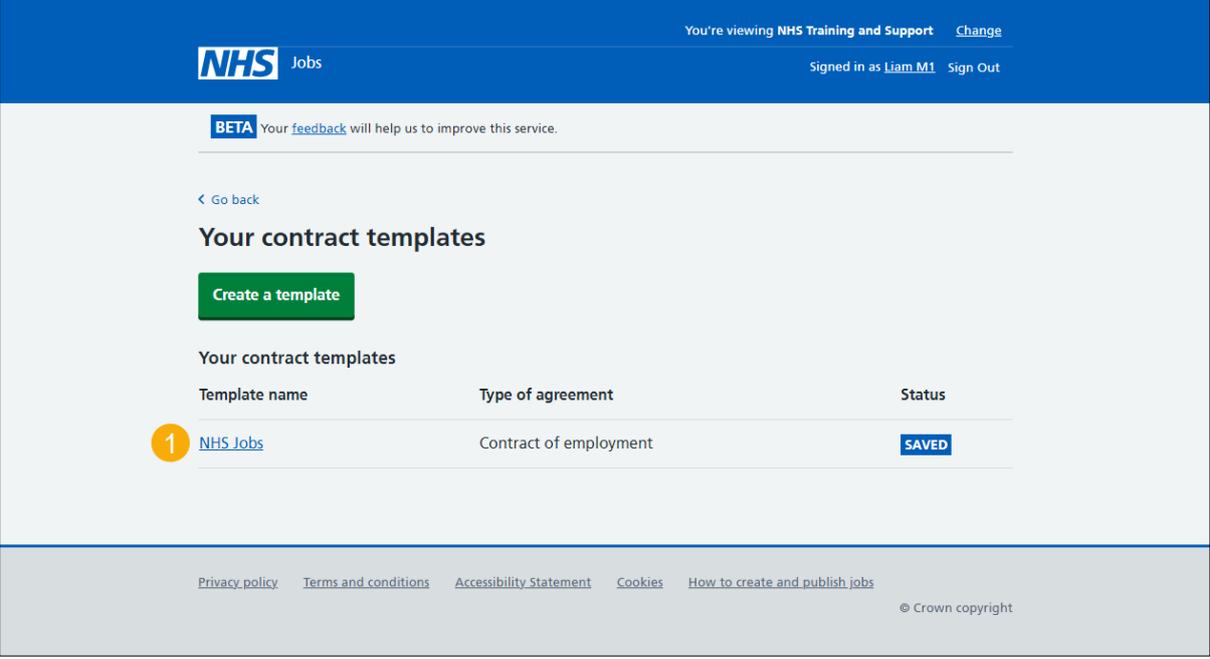
View your contract templates

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
NHS Jobs	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 for managing a contract 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'. Below the header, there's a 'BETA' notice. The main content area has a 'Go back' link and the title 'NHS Jobs'. A table lists the template details:

Template name	NHS Jobs	Change
Type of agreement	A contract of employment	Change
Additional principal terms	Notice period	Change

Below the table, there's a 'Terms and conditions' section with a [Change](#) link. The terms section contains placeholder text: '# 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 highlights the 'Delete' and 'Preview (PDF, 4 KB)' links. 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.

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.

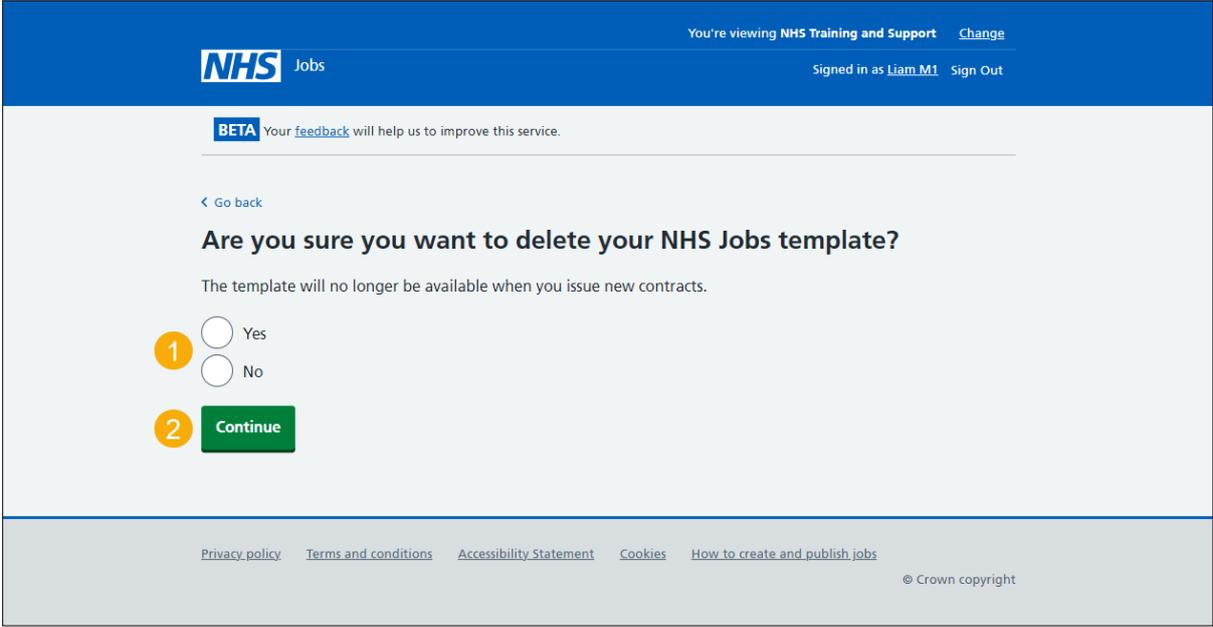
Are you sure you want to delete your template?

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 a 'BETA' badge and the text 'Your feedback will help us to improve this service.' Below that is a '< Go back' link. The main heading is '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 button options: '1 Yes' and '2 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', and a copyright notice '© Crown copyright'.

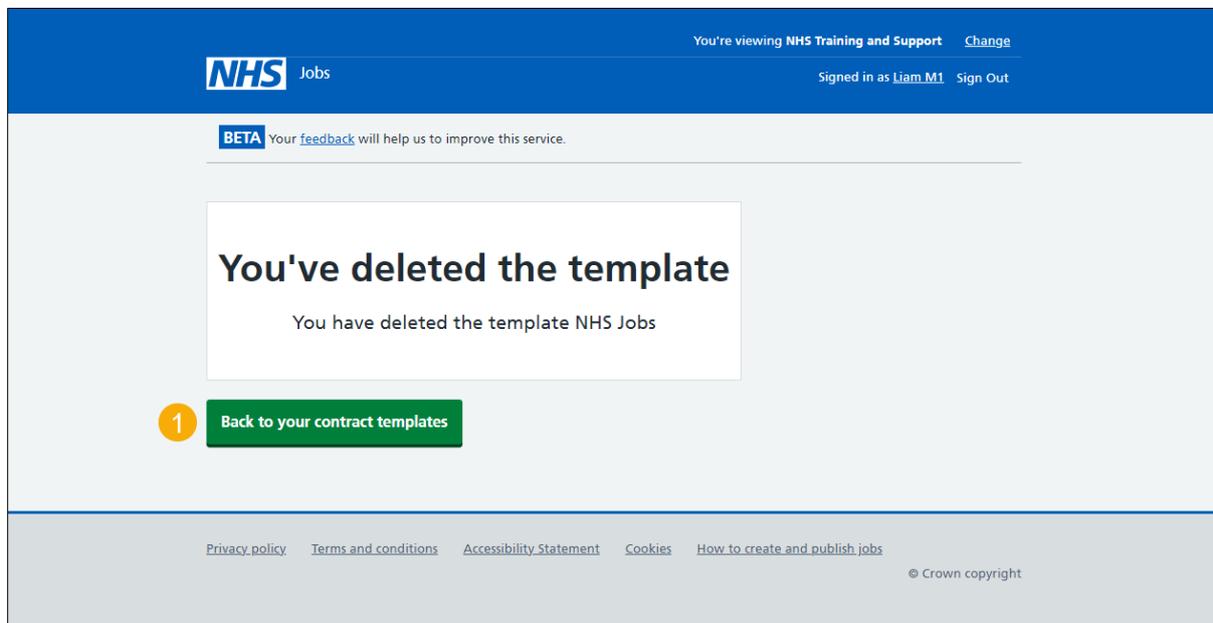
If you don't want to delete your contract template, you've reached the end of this user guide.

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.