

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, preview, change, download and delete a contract template.

Once a template is created, it can be used by the applicable roles in your organisations 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 manager' or 'Recruitment administrator' for your organisations account.

To manage your contract templates in your organisations account, 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 user's name 'Signed in as Lee Mapes', and a 'Sign Out' button. A toggle switch for 'Show tasks for all accounts' is visible. The main content area is titled 'NHSBSA Lee UAT Dashboard' and features a 'Tasks by stage' section with a dropdown menu set to 'All users'. The tasks are listed as follows:

Task Stage	Count	Progress
Draft	11	Progress bar (green)
Published	5	Progress bar (green)
Shortlisting	26 - on track 24, overdue 2	Progress bar (green and red)
Interviews	15 - on track 14, overdue 1	Progress bar (green and red)
Ready to offer	10 - on track 9, overdue 1	Progress bar (green and red)
Conditional offers	14 - on track 4, overdue 10	Progress bar (green and red)
Pre-employment checks	0	Progress bar (grey)
Contracts	6	Progress bar (green)
End recruitment	0	Progress bar (grey)

On the right side, the 'What you can do' section contains three buttons: 'Create a job listing', 'Search for a listing', and 'Search for an applicant'. The 'Manage the account' section lists various links: 'Manage users', 'At risk applicants', 'Accredited logos', 'Key performance indicators (KPIs)', 'Approval settings', 'Departments', 'Criminal convictions and cautions', 'Welsh listings', and 'Moving applicants to other accounts'. The 'Documents and templates' section includes links for 'Overview of your organisation', 'Supporting information library', 'Contract templates' (highlighted with a red circle and the number 1), and 'Offer letter templates'.

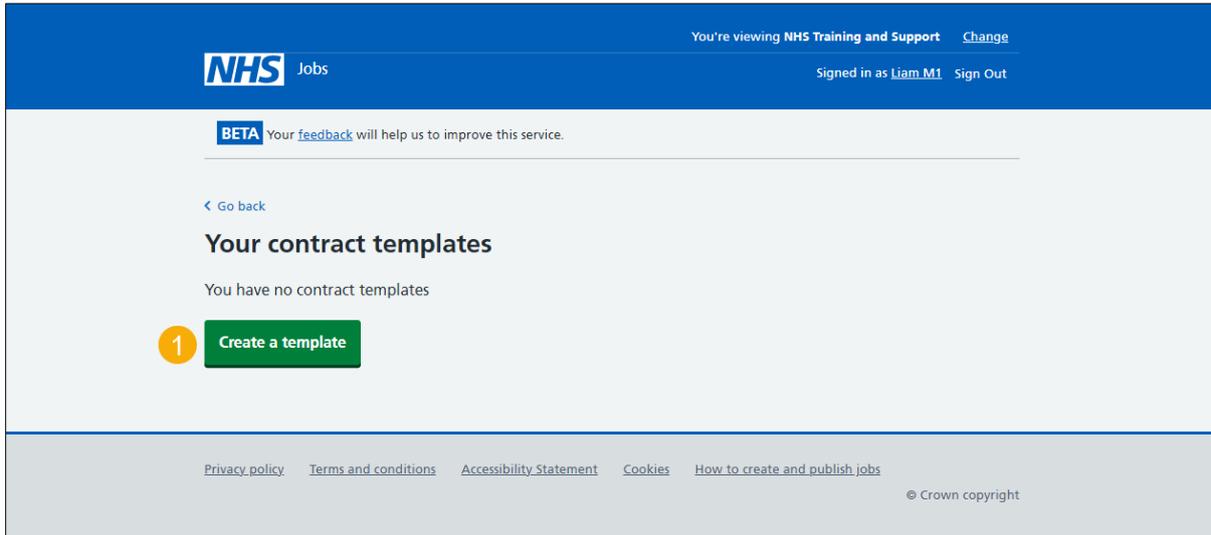
Your contract templates

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.



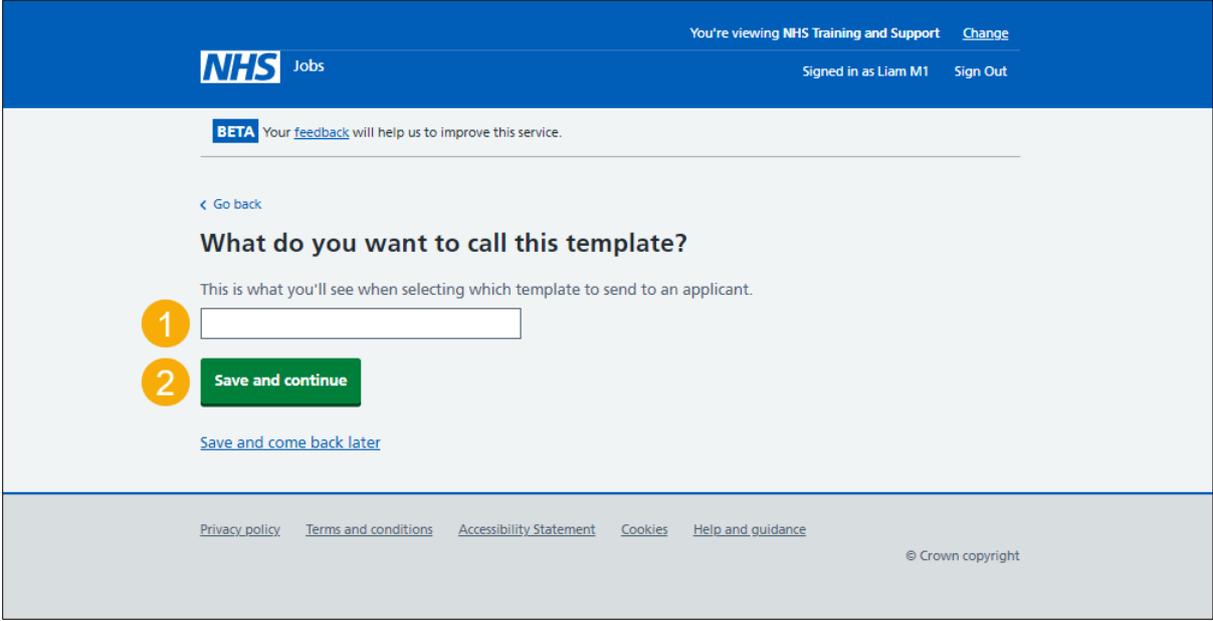
What do you want to call this template?

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.



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 Training and Support' with a 'Change' link on the right. Below the header, it says 'Signed in as Liam M1' 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 'What do you want to call this template?'. Underneath, it says 'This is what you'll see when selecting which template to send to an applicant.' There are two numbered steps: '1' next to an empty text input field, and '2' next to a green 'Save and continue' button. Below the button is a link 'Save and come back later'. At the bottom, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance', along with the text '© Crown copyright'.

Tip: To save your progress, you can select the 'Save and come back later' link.

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'. The 'A contract of employment' option is selected, indicated by a yellow circle with the number '1'. Below the options, there is a green 'Save and continue' button with a yellow circle and the number '2' next to it. A 'Save and come back later' link 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 text '© Crown copyright'.

Principal terms of employment

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 to your contract template, complete the following steps:

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

Jobs

You're viewing NHSBSA Lee UAT [Change](#)
Signed in as Lee Mapes [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 or Grade	band or grade
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

[Privacy policy](#)
[Terms and conditions](#)
[Accessibility Statement](#)
[Cookies](#)
[Help and guidance](#)

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Add a term of employment

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 'Add a term of employment' form. At the top, there is a blue header with the NHS logo, 'Jobs', and user information: 'You're viewing NHSBSA Lee UAT Change' and 'Signed in as Lee Mapes Sign Out'. Below the header, a 'BETA' badge 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 has two input fields: 'Type of term' (with the example 'Notice period') and 'Details of the term' (with the example '30 days'). A green 'Save and continue' button is at the bottom. The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance', along with the copyright notice '© Crown copyright'.

Manage terms of employment

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

Important: In this example, a new fixed term is added: Notice period 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 **NHSBSA Lee UAT** [Change](#)


Signed in as Lee Mapes [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 or Grade	band or grade
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

[Privacy policy](#)
[Terms and conditions](#)
[Accessibility Statement](#)
[Cookies](#)
[Help and guidance](#)

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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** instructions 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 **NHSB5A Lee UAT** [Change](#)

Signed in as Lee Mapes [Sign Out](#)

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

[Go back](#)

Add more terms and conditions to the template

1

2 [Save and continue](#)

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

[Privacy policy](#) [Terms and conditions](#) [Accessibility Statement](#) [Cookies](#) [Help and guidance](#)

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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, change or confirm the details before creating the template, complete the following steps:

1. Select this '[Change](#)' link to change the template name (optional).
2. Select this '[Change](#)' link to change the type of agreement (optional).
3. Select this '[Change](#)' link to change the additional principal terms (optional).
4. Select this '[Change](#)' link to change the terms and conditions (optional).
5. Select the 'preview the contract template' link (optional).
6. Select the 'download the contract template' link (optional).
7. Select the '[Create the template](#)' button.

The screenshot shows the 'Check the details before creating the template' page on the NHS Jobs portal. The page is titled 'Check the details before creating the template' and includes a 'Go back' link. The main content area contains a table with the following details:

Template name	NHS Jobs	Change 1
Type of agreement	A contract of employment	Change 2
Additional principal terms	Notice period	Change 3
Terms and conditions		Change 4

Below the table, there are instructions for formatting text: '# This is a heading', '## This is a sub-heading', '* Bullet information A', '* Bullet information B', '* Bullet information C', '1. Numbered information A', '2. Numbered information B', '3. Numbered information C'.

The 'Save and create the template' section includes the text: 'When you're satisfied that they're correct, save these details and create the template so it can be used to issue contracts.' Below this, there are two links: 'preview the contract template (PDF, 4 KB)' (5) and 'download the contract template (PDF, 4 KB)' (6). At the bottom of this section is a green 'Create the template' button (7) and a 'Save and come back later' link.

The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance', along with the copyright notice '© Crown copyright'.

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

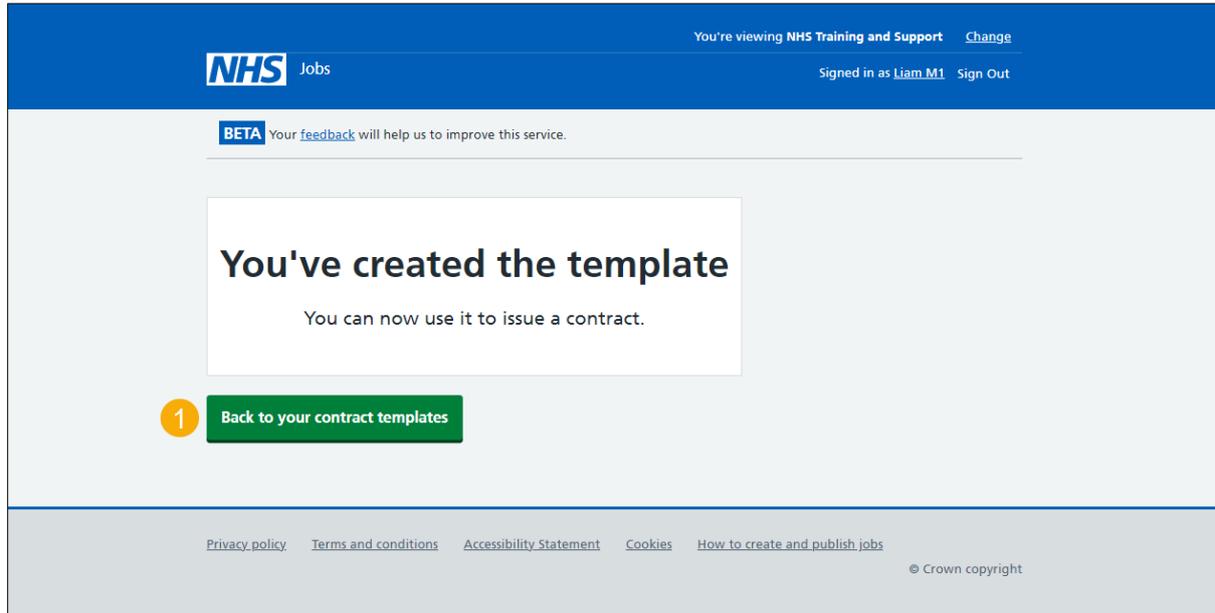
You've created the template

This page shows confirmation you've created the template.

Important: You can now use it to issue 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: You'll only see this page if you're viewing your contract templates. In this example, the 'NHS Jobs' contract template is saved.

To view your contract template details, complete the following step:

1. Select the ['template name'](#) 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 'Your contract templates', followed by a green 'Create a template' button. Below that, the heading 'Your contract templates' is followed by a table:

Template name	Type of agreement	Status
NHS Jobs	Contract of employment	SAVED

At the bottom, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs'. A copyright notice '© Crown copyright' is at the bottom right.

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 this '[Change](#)' link to change the template name (optional).
2. Select this '[Change](#)' link to change the type of agreement (optional).
3. Select this '[Change](#)' link to change the additional principal terms (optional).
4. Select this '[Change](#)' link to change the terms and conditions (optional).
5. Select the '[Delete](#)' link (optional).
6. Select the 'preview' link (optional).
7. Select the 'download' link (optional).

The screenshot shows the NHS Jobs interface for managing a contract template. At the top, it says 'You're viewing NHSBSA Lee UAT' and 'Signed in as Lee Mapes'. The main content area has a 'BETA' notice and a 'Go back' link. The template details are as follows:

Template name	NHS Jobs	Change (1)
Type of agreement	A contract of employment	Change (2)
Additional principal terms	Notice period	Change (3)
Terms and conditions		Change (4)

The 'What you can do' sidebar contains:

- [Delete](#) (5)
- [Preview \(PDF, 4 KB\)](#) (6)
- [Download \(PDF, 4 KB\)](#) (7)

At the bottom, there are links for Privacy policy, Terms and conditions, Accessibility Statement, Cookies, and Help and guidance. 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 contract template?

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

Important: You'll only see this page if you're deleting your contract template. The template will no longer be available when you issue new contracts.

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

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

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 '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: '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 are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs'. A copyright notice '© Crown copyright' is at the bottom right.

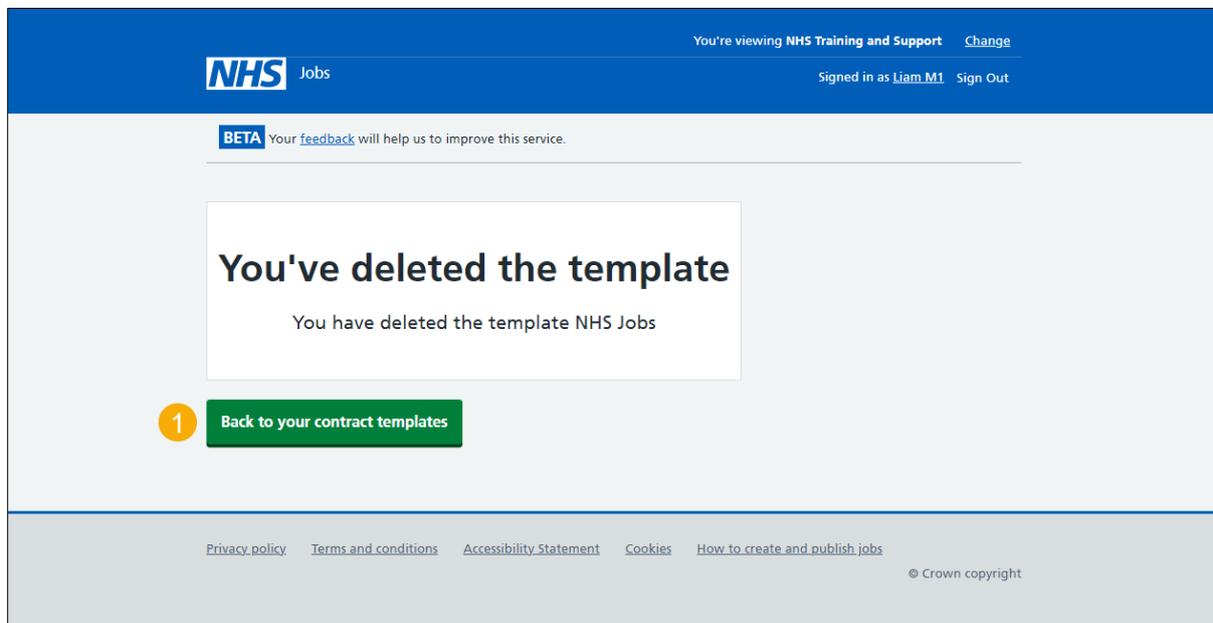
If you don't want to delete your contract template, you've reached the end of this user guide.

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.