

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, preview, change, download and delete an offer letter 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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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 manager' or 'Recruitment administrator' for your organisations account.

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

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

The screenshot displays the NHSBSA MW UAT Dashboard. At the top, it shows the user is signed in as Michael Wardman. The dashboard is divided into several sections:

- Header:** NHS Jobs logo, user name, and account type (NHSBSA MW UAT).
- Navigation:** 'Tasks by stage' and 'Listings by user' tabs. A dropdown menu for 'Showing tasks for' is set to 'All users'.
- Task Stages:** A list of stages with counts and progress bars:

Stage	Count	Details
Draft	23	- on track 20, overdue 3
Approvals	4	- on track 0, due 2, overdue 2
Published	9	
Shortlisting	15	- on track 6, due 3, overdue 6
Interviews	10	- on track 0, overdue 10
Ready to offer	6	- on track 0, overdue 6
Conditional offers	1	- on track 0, overdue 1
Pre-employment checks	0	
Contracts	7	- on track 0, overdue 7
- What you can do:** Buttons for 'Create a job listing', 'Search for a listing', and 'Search for an applicant'.
- Manage the account:** Links for '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'.
- Documents and templates:** Links for 'Overview of your organisation', 'Supporting information library', 'Contract templates', and 'Offer letter templates' (highlighted with a '1' in a yellow circle).

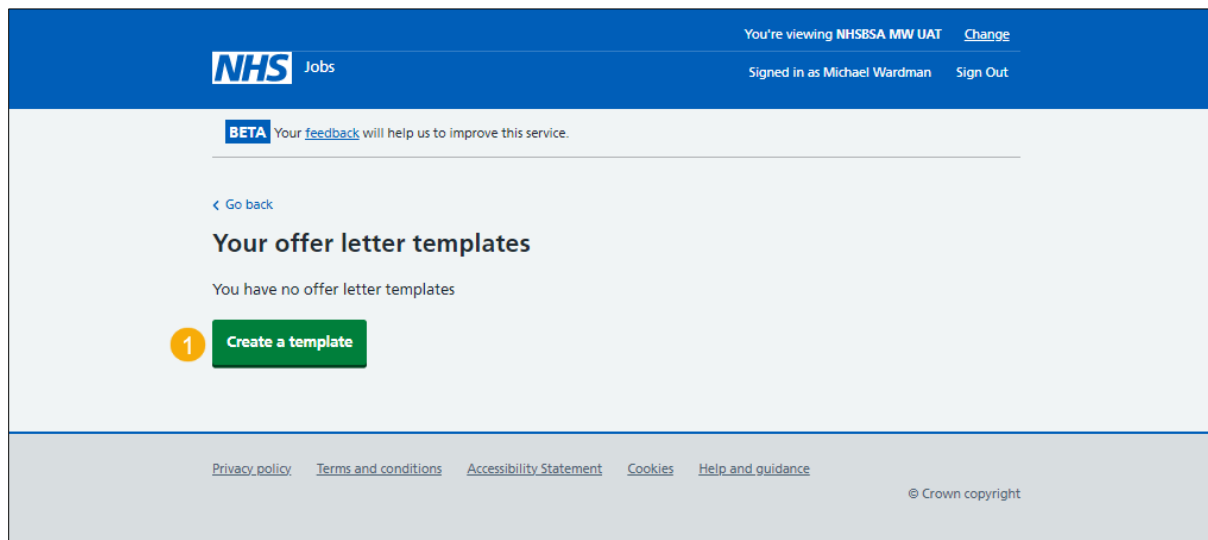
Your offer letter templates

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.



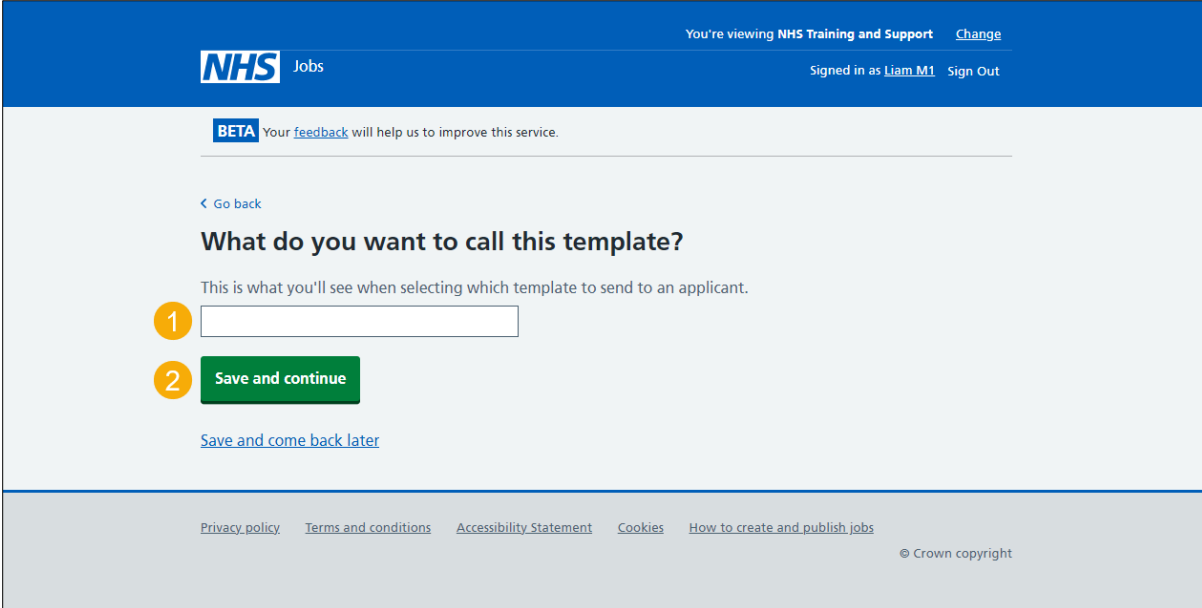
What do you want to call this template?

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.



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, 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?'. Below this, a sub-heading reads: '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 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 '© Crown copyright'.

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

Principal terms of employment

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 to your contract template, 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 term of employment

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 '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 three numbered steps: 1. 'Type of term' with a text input field and the example 'Notice period'. 2. 'Details of the term' with a text input field and the example '30 days'. 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', along with the copyright notice '© Crown copyright'.

Manage a fixed term 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 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](#)
NHS Jobs
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)
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** 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 NHSBSA MW UAT [Change](#)

Signed in as Michael Wardman [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**

[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 offer letters.

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

1. Select this '[Change](#)' to change the template name (optional).
2. Select this '[Change](#)' link to change the additional principle terms (optional).
3. Select the '[Change](#)' link to change the terms and conditions (optional).
4. Select the 'preview the template' link.
5. Select the 'download the template' link (optional).
6. 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 'Change'. Below that, it says 'Signed in as Liam.M1' and 'Sign Out'. A 'BETA' banner indicates that feedback will help improve the service. The main heading is 'Check the details before creating the template'. Below this, there are three main sections: 'Template name' (NHS Jobs) with a 'Change' link (1); 'Additional principal terms' (Notice period: 30 days) with a 'Change' link (2); and 'Terms and conditions' with a 'Change' link (3). The 'Terms and conditions' section includes instructions for entering headings, sub-headings, bullet points, and numbered information. Below these sections is a 'Save and create the template' section with instructions. There are also links for 'preview the template (PDF, 4 KB)' (4) and 'download the template (PDF, 4 KB)' (5). At the bottom, there is a green 'Create the template' button (6) 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).

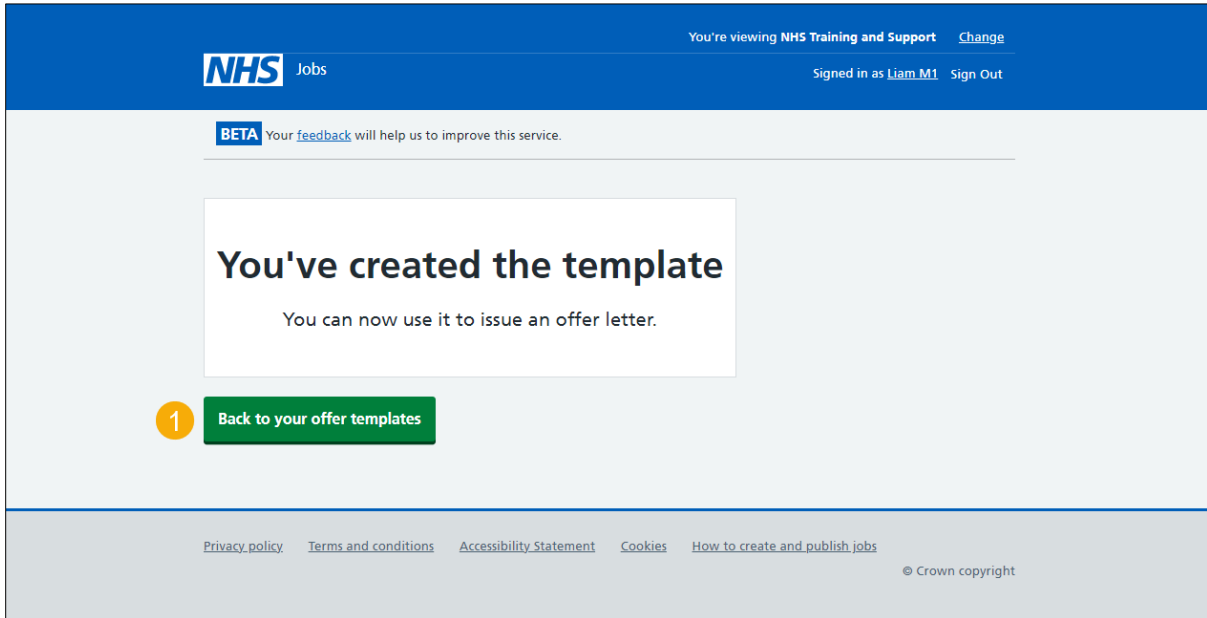
You've created the template

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: You'll only see this page if you're viewing your offer letter templates. In this example, the 'NHS Jobs' template is saved.

To view your offer letter 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 offer letter templates', followed by a green 'Create a template' button. Below that, the heading 'Your offer letter templates' is followed by a table with two columns: 'Template name' and 'Status'. The table contains one row with 'NHS Jobs' in the 'Template name' column and 'SAVED' in the 'Status' column. A yellow circle with the number '1' highlights the 'NHS Jobs' link. 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'.

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 this '[Change](#)' to change the template name (optional).
2. Select this '[Change](#)' link to change the additional principle terms (optional).
3. Select the '[Change](#)' link to change the terms and conditions (optional).
4. Select the '[Delete](#)' link (optional).
5. Select the 'preview the template' link (optional).
6. 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 NHSBSA MW UAT' with a 'Change' link, and 'Signed in as Michael Wardman' 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 on the left. The main content area is titled 'NHS Administrative template'. It has three main sections: 'Template name' (NHS Administrative template) with a 'Change' link; 'Additional principal terms' (Notice period: 30 days) with a 'Change' link (callout 1); and 'Terms and conditions' with a 'Change' link. A 'What you can do' sidebar on the right contains three links: 'Delete' (callout 2), 'Preview (PDF, 4 KB)' (callout 3), and 'Download (PDF, 4 KB)' (callout 4). At the bottom, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance', 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.

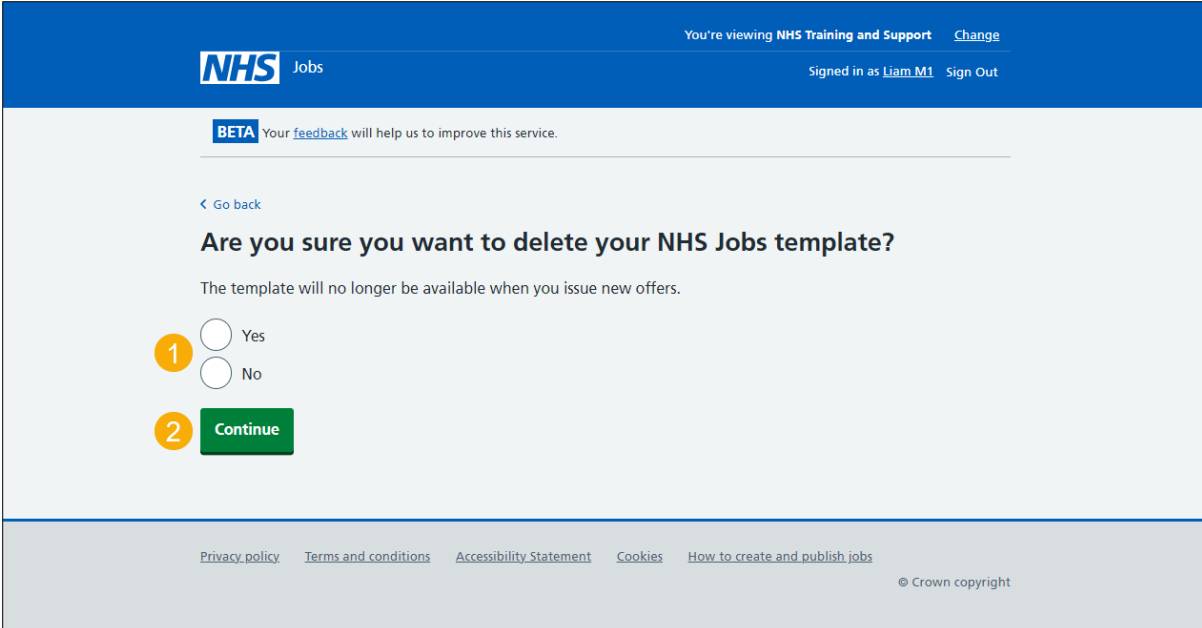
Are you sure you want to delete your template?

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

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

To confirm if you're sure you want to delete your offer letter 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'.

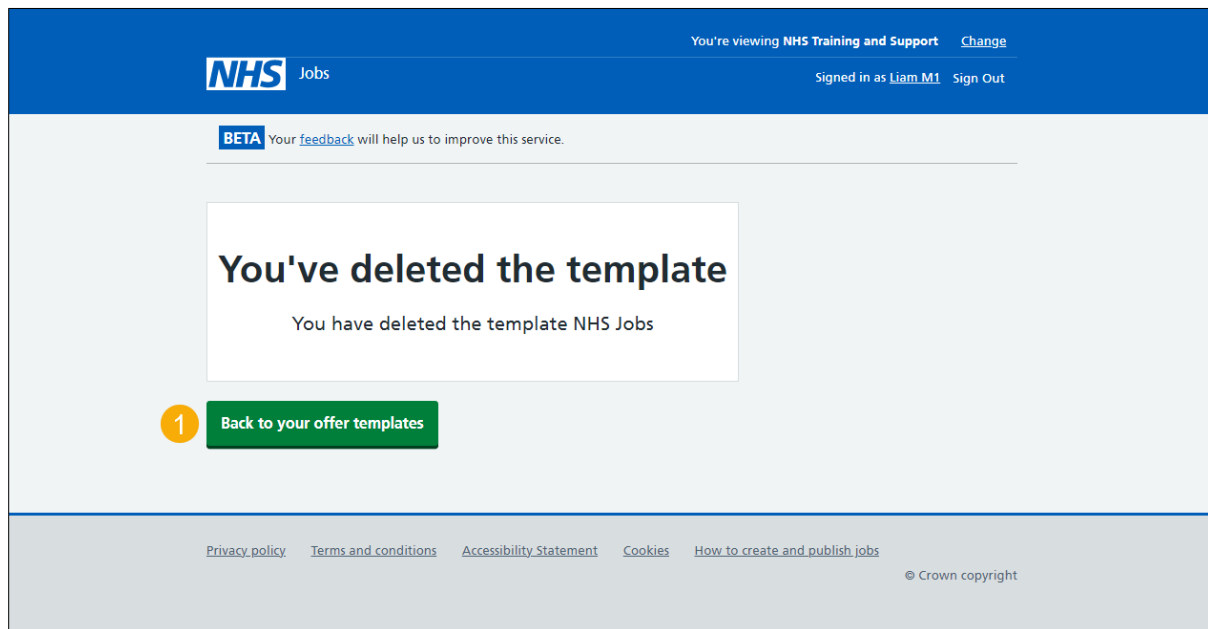
If you don't want to delete your offer letter template, you've reached the end of this user guide.

You've deleted the offer letter template

This page shows confirmation you've deleted the offer letter template.

To go back to your offer letter 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.