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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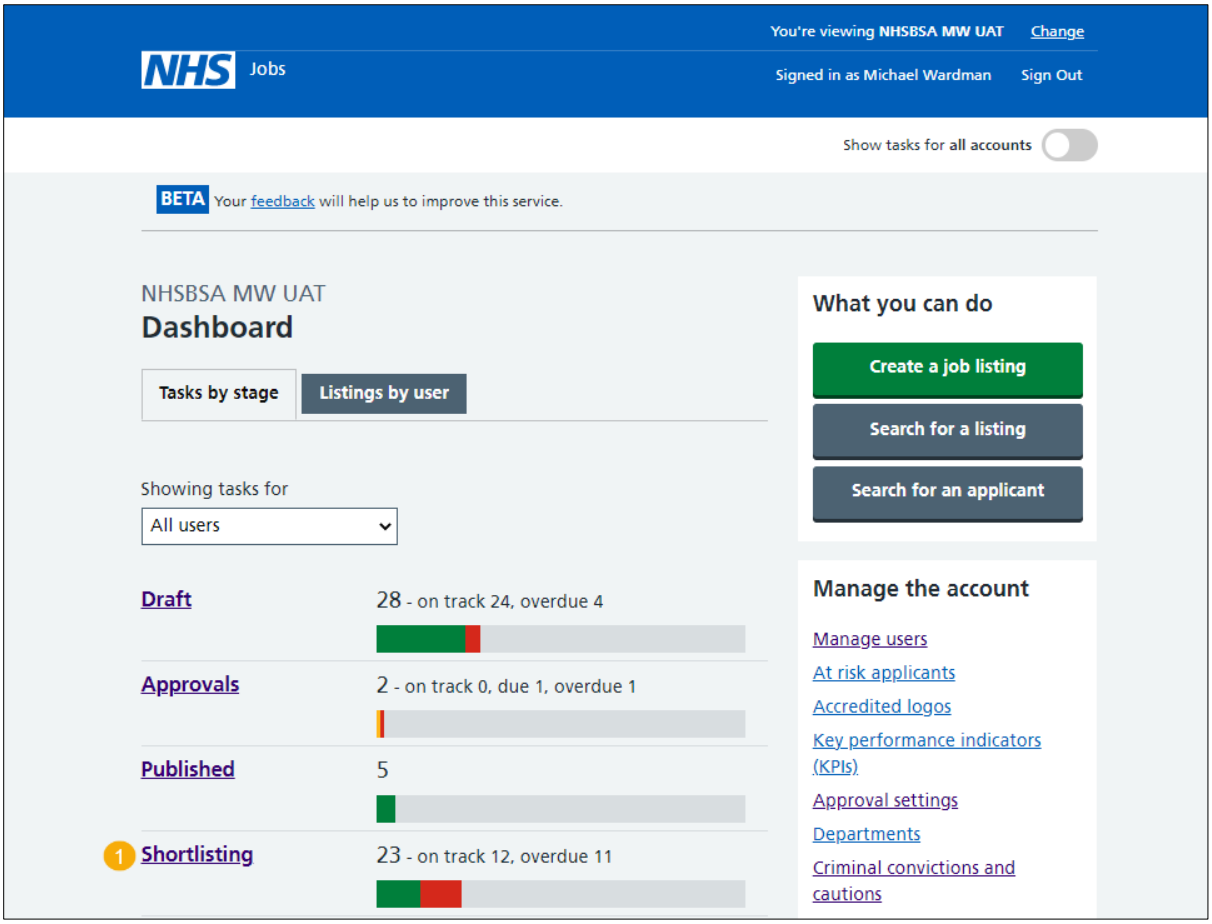
Shortlisting

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.



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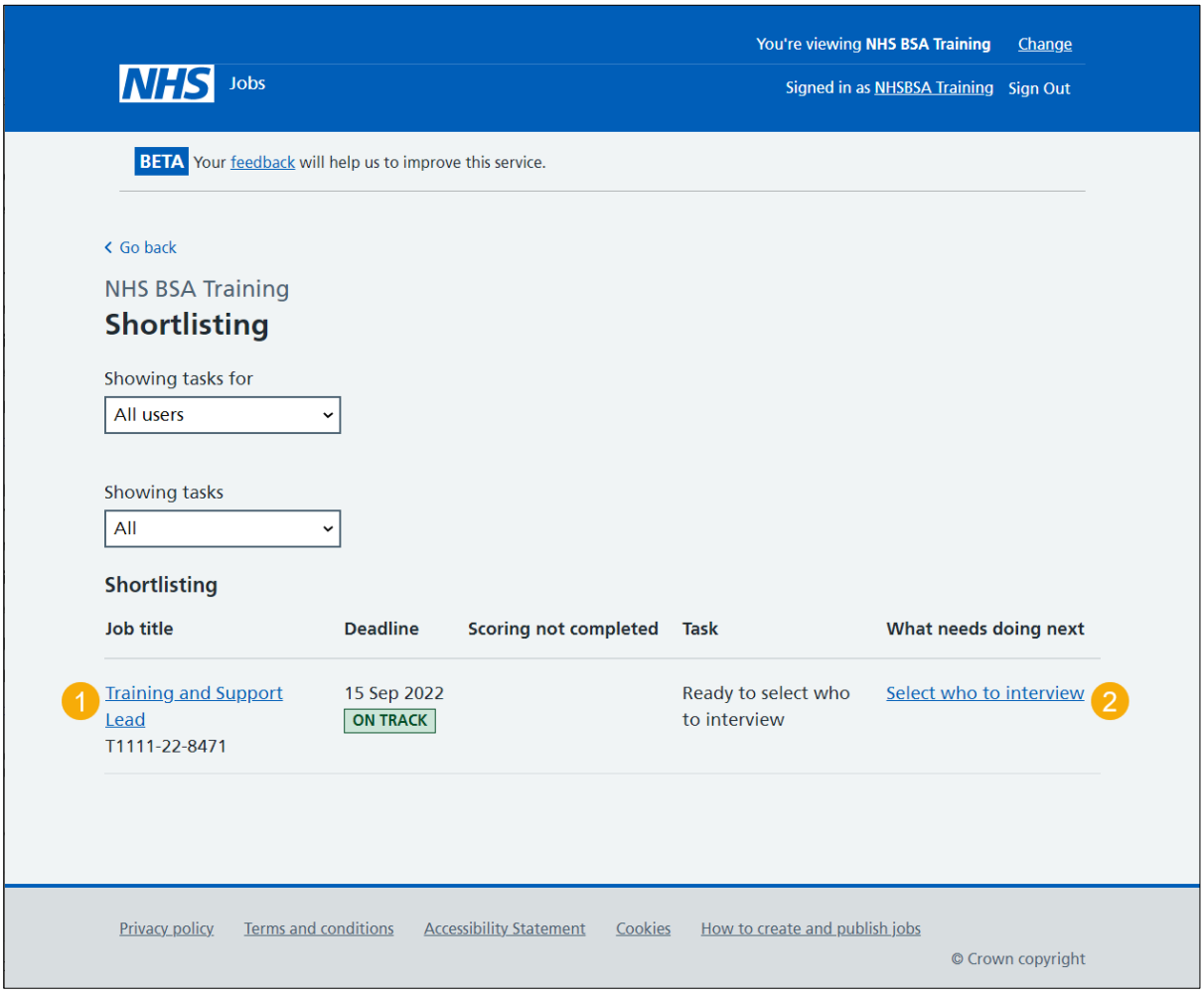
Select who to interview

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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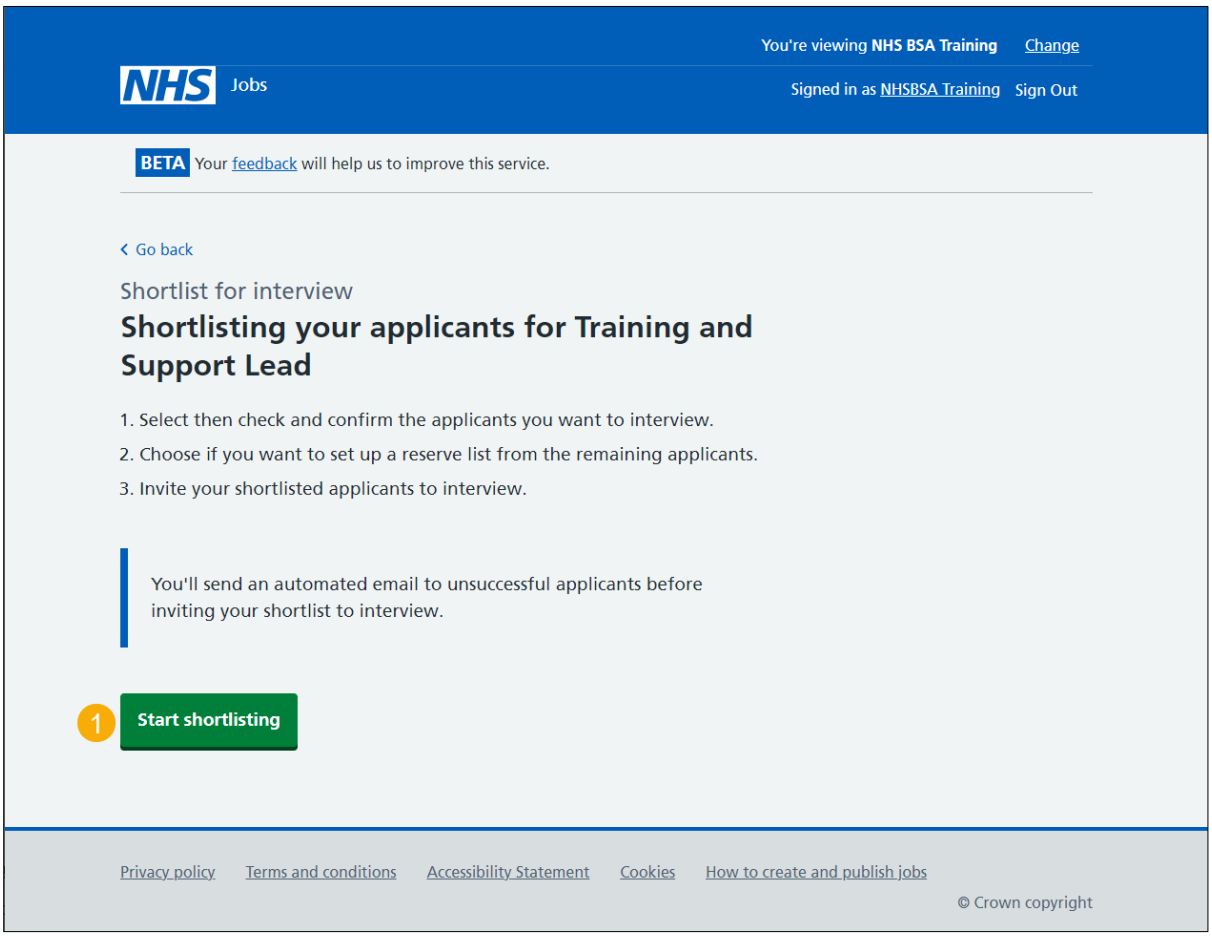
Start shortlisting

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.



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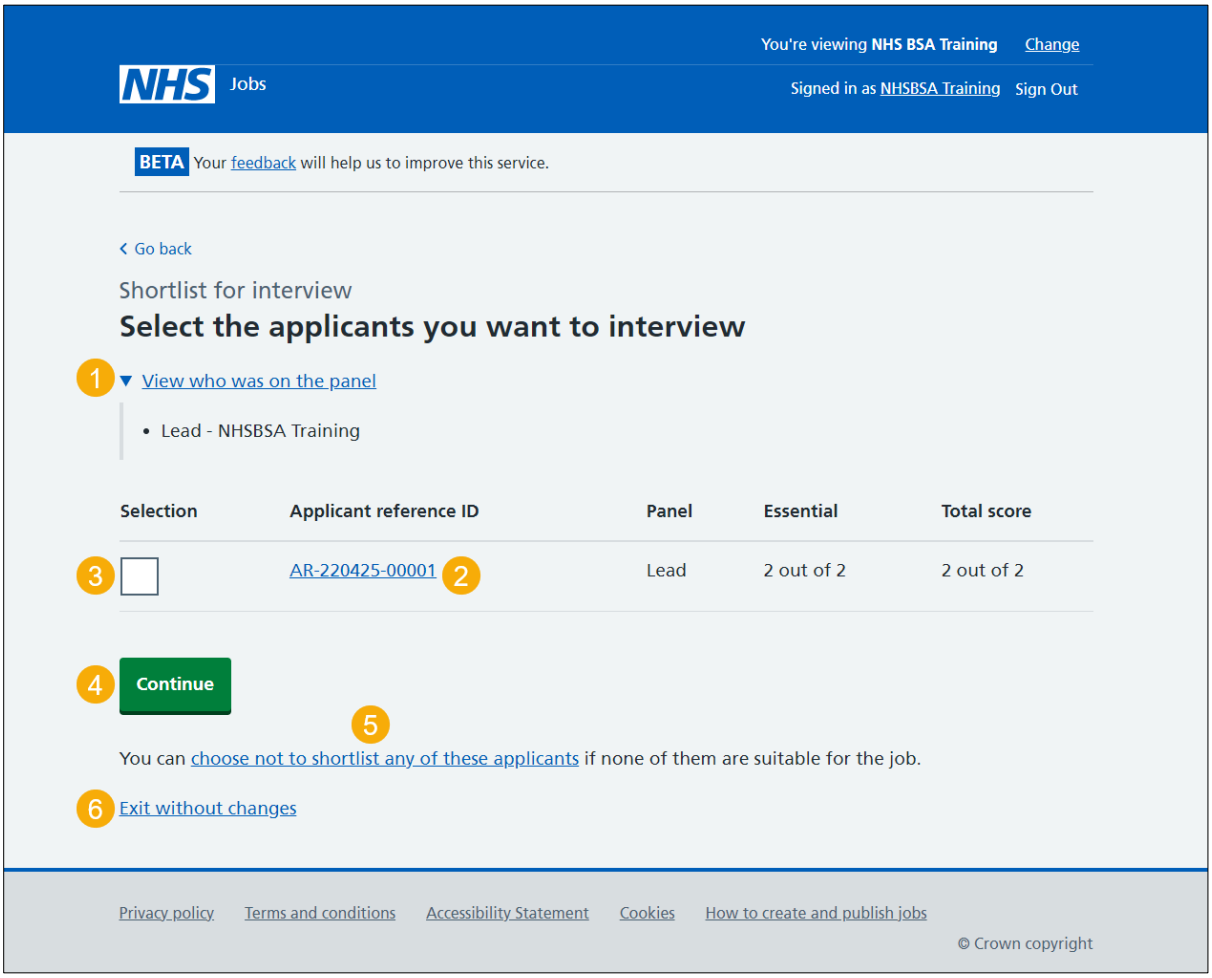
Select the applicants you want to interview

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.



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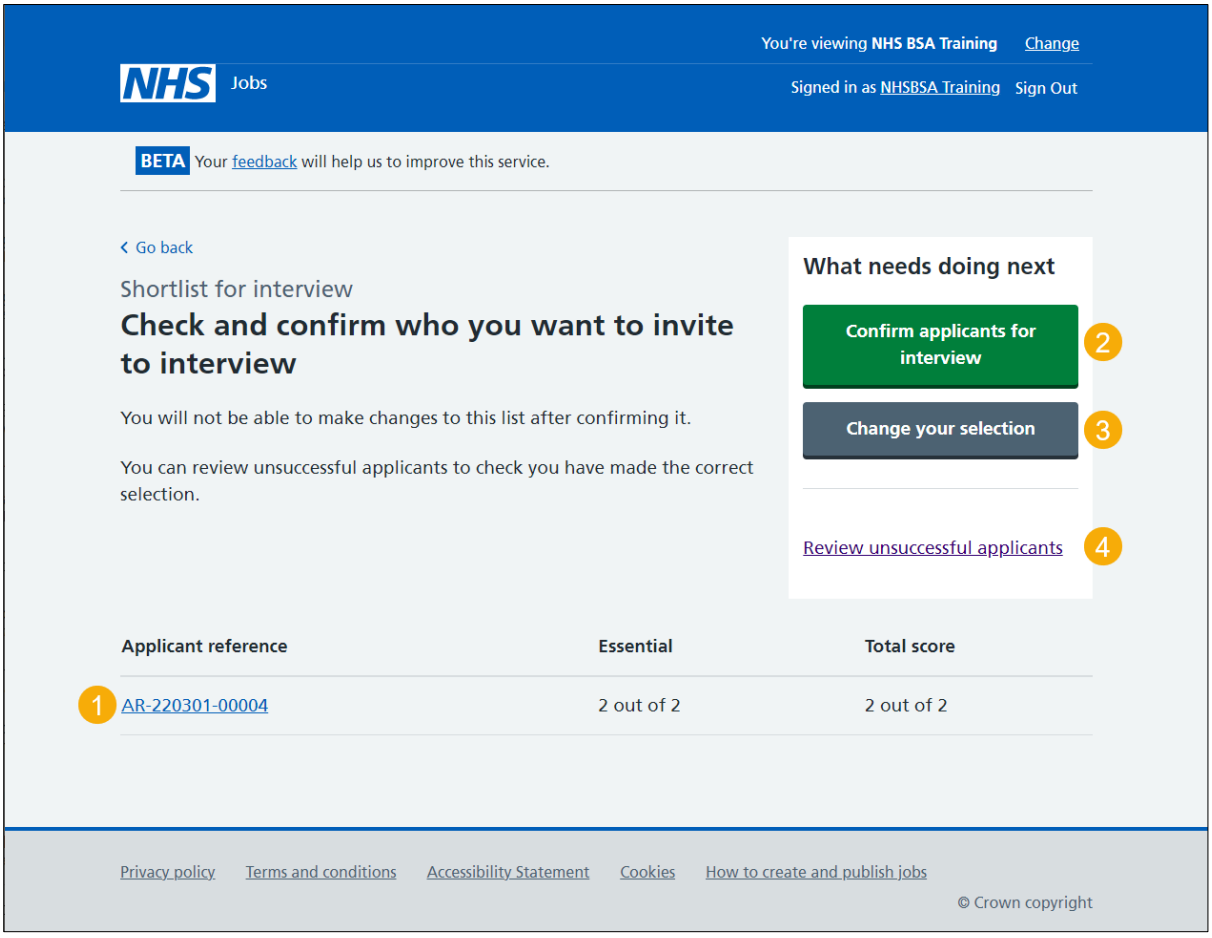
Check and confirm who you want to invite to interview

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).



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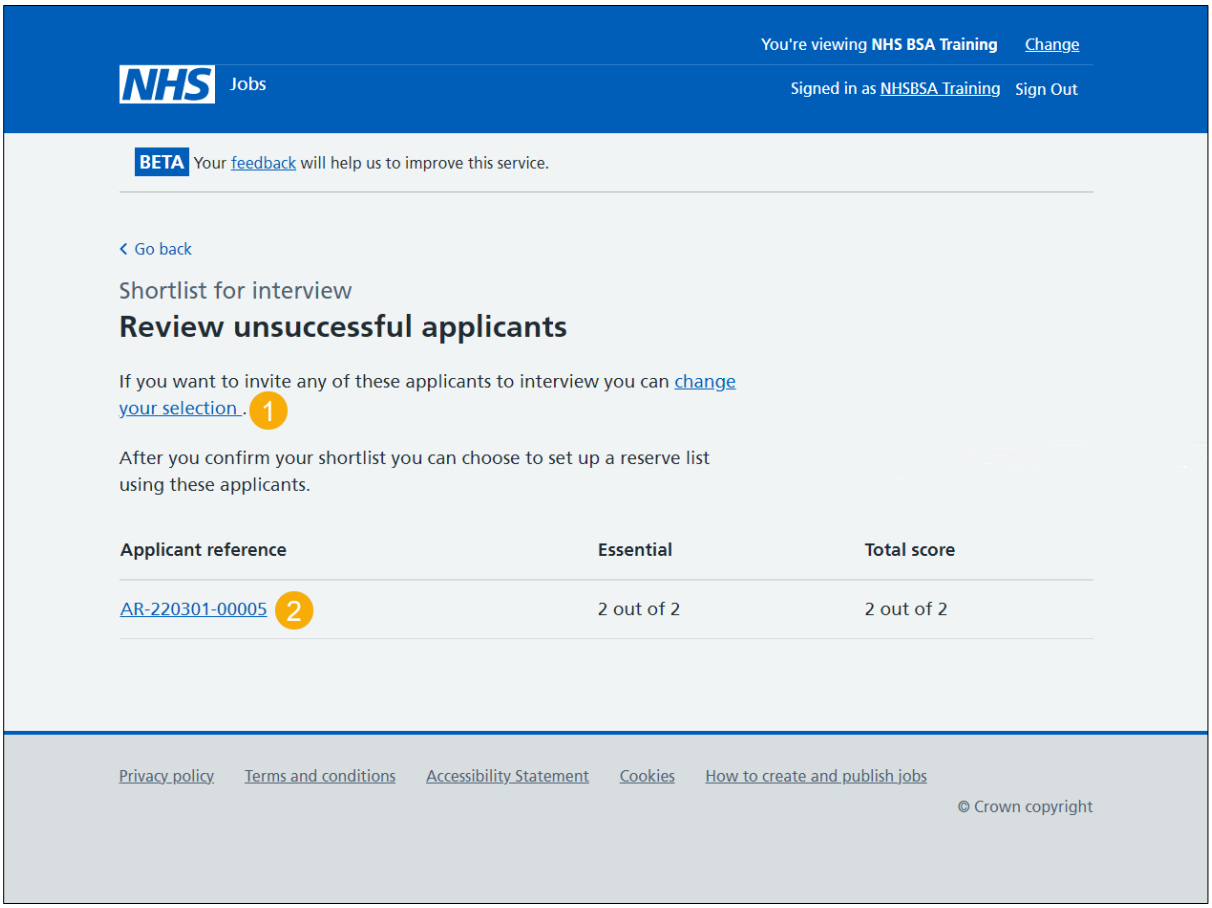
Review unsuccessful applicants

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).



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

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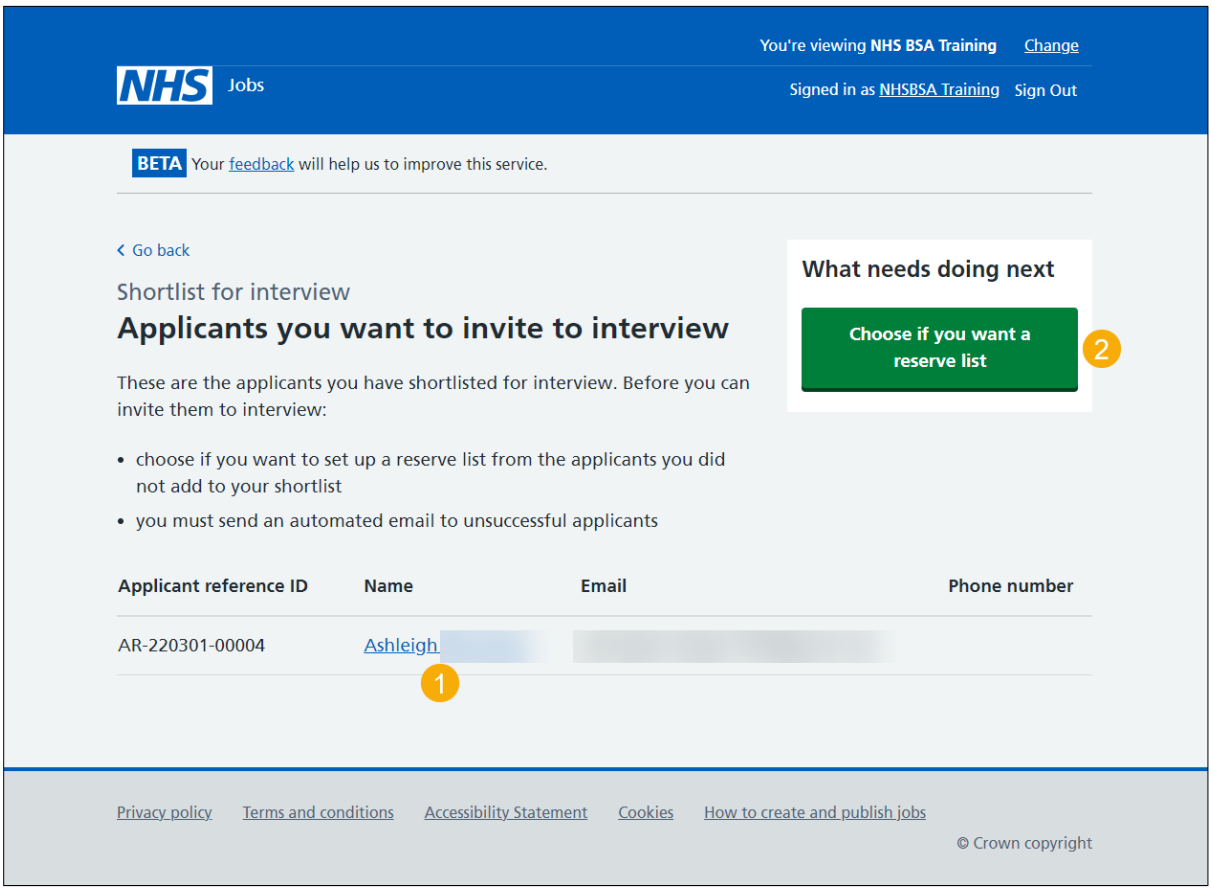
Choose if you want a reserve list

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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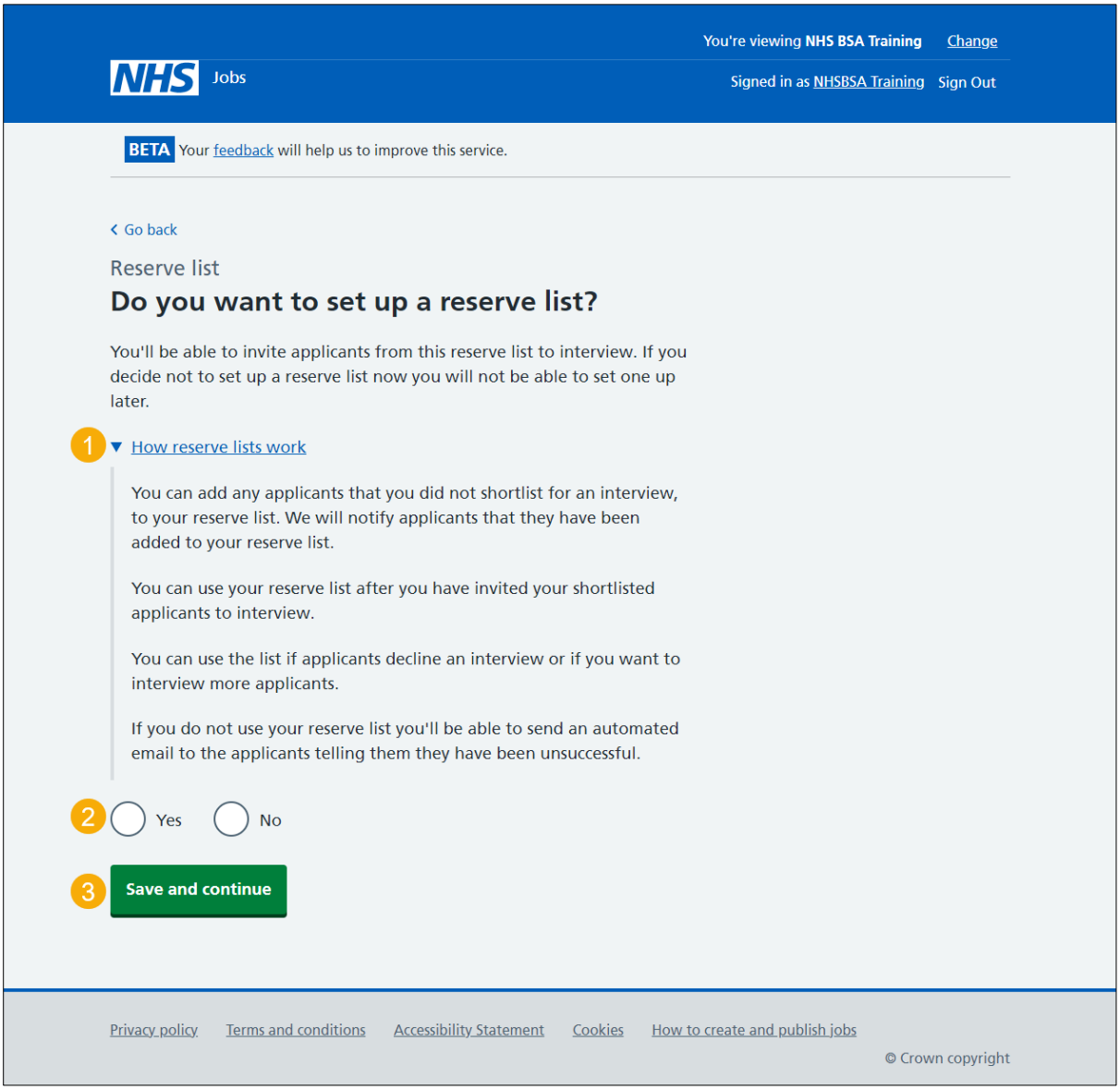
Do you want to set up a reserve list?

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.



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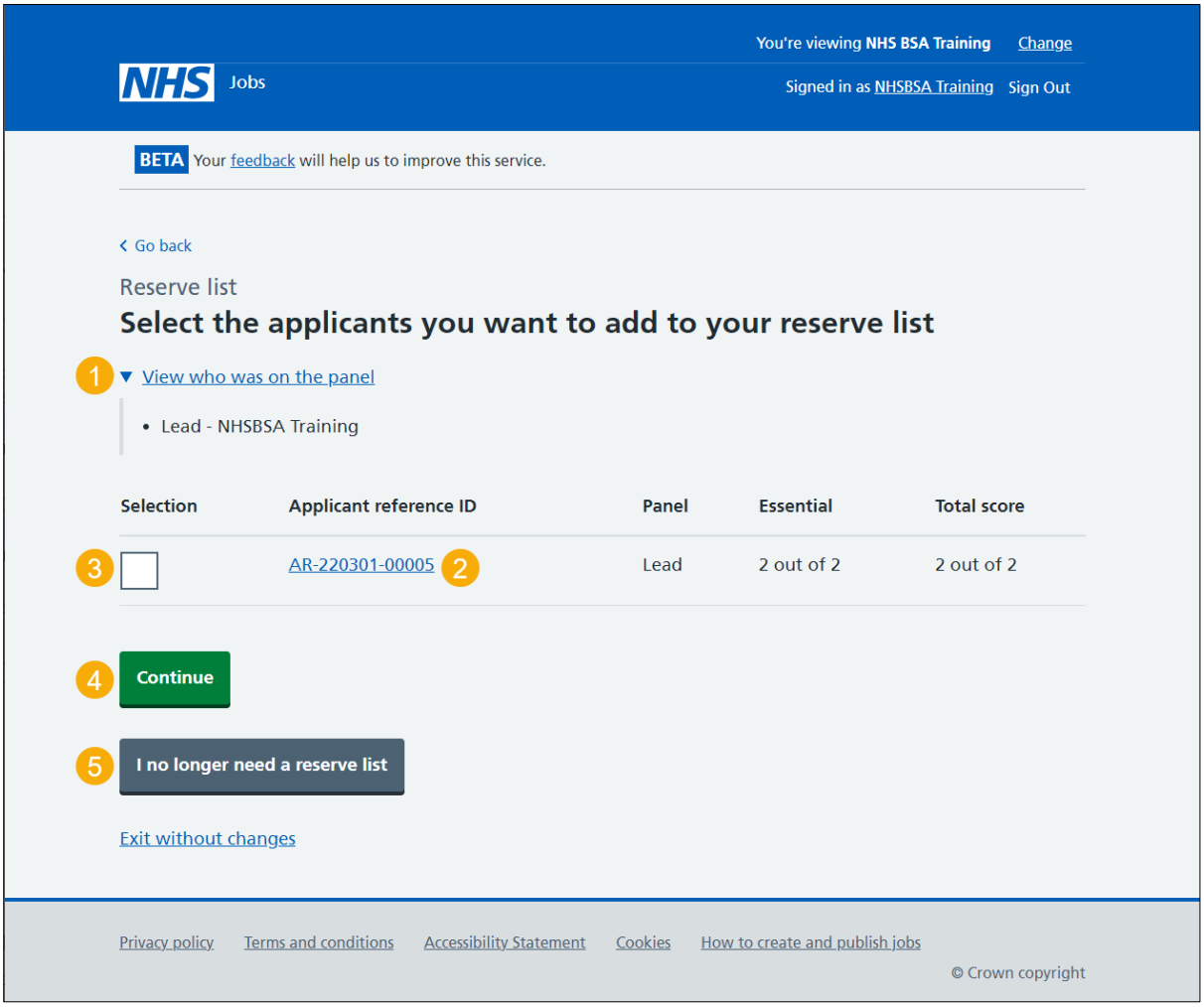
Select the applicants you want to add to your reserve list

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).



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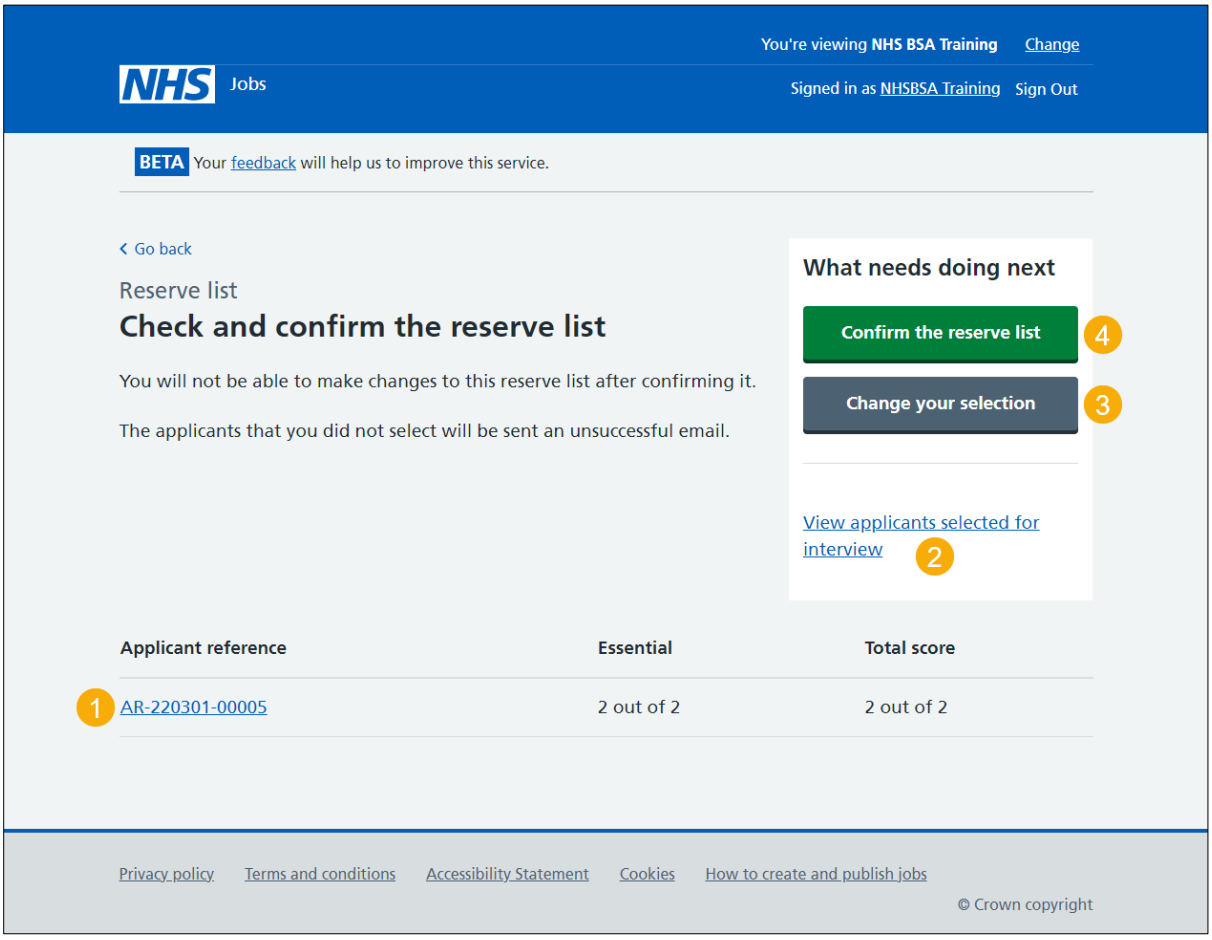
Check and confirm the reserve list

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.



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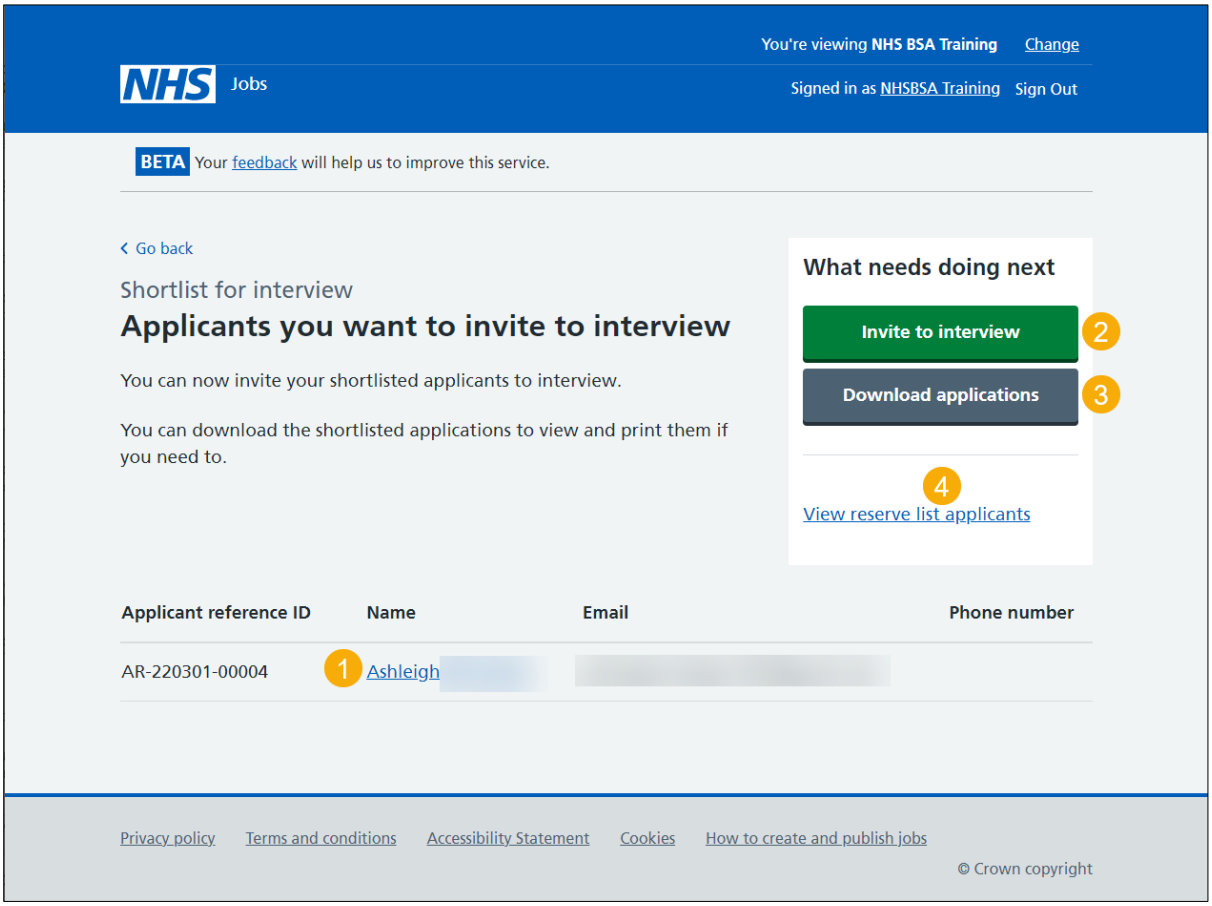
Applicants you want to invite to interview with a reserve list

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).



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.

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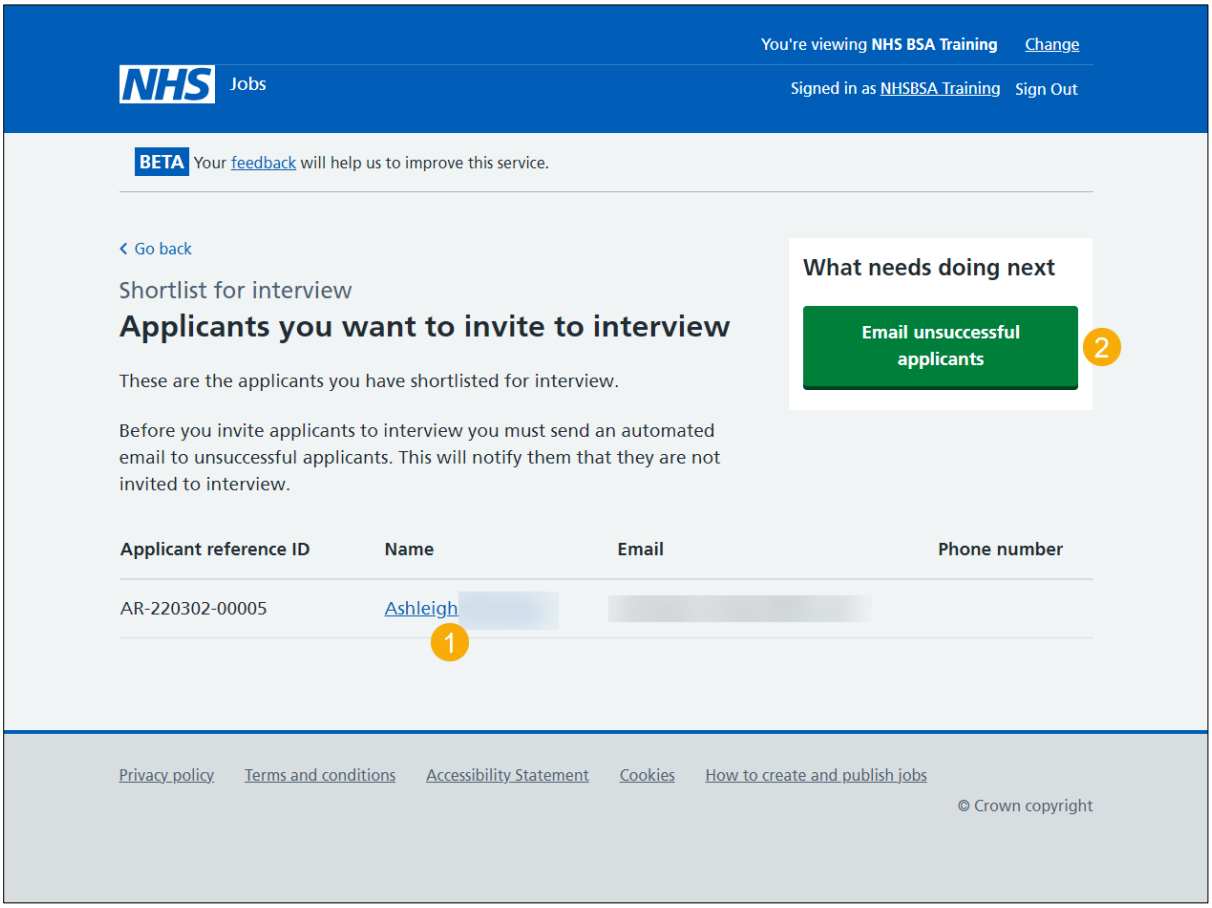
Applicants you want to invite to interview without a reserve list

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.



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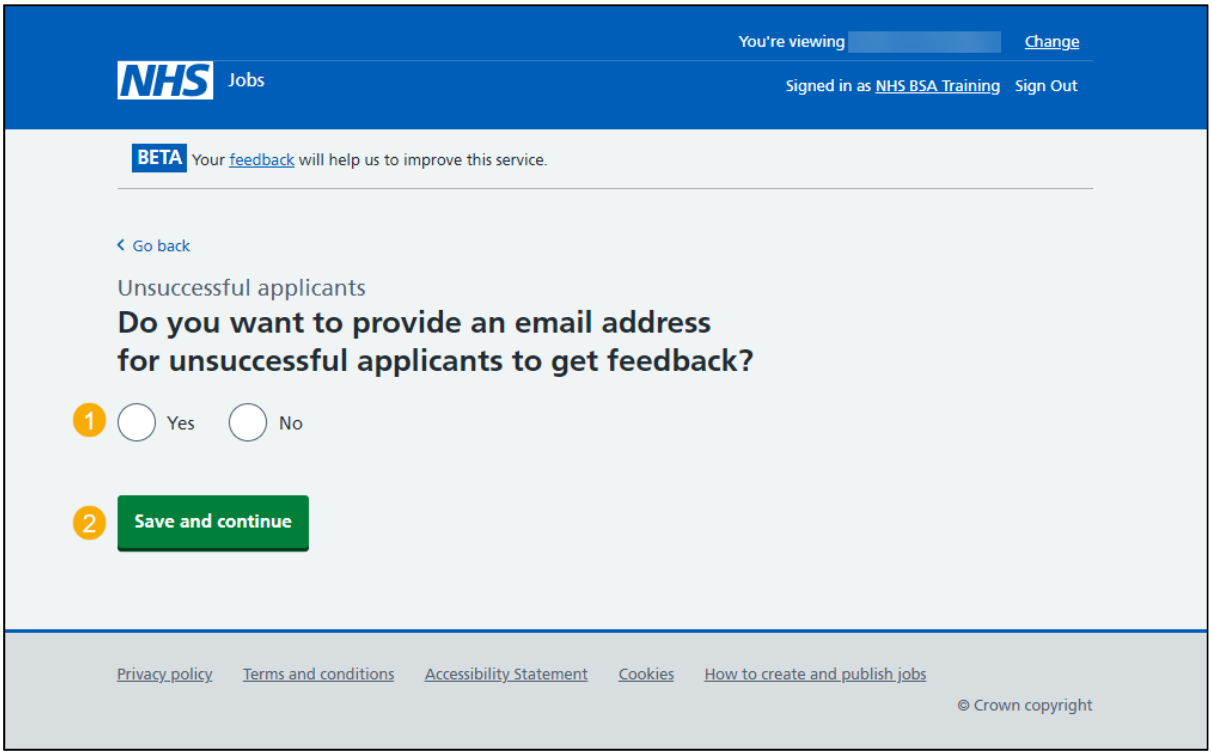
Do you want to provide an email address for unsuccessful applicants to get feedback?

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



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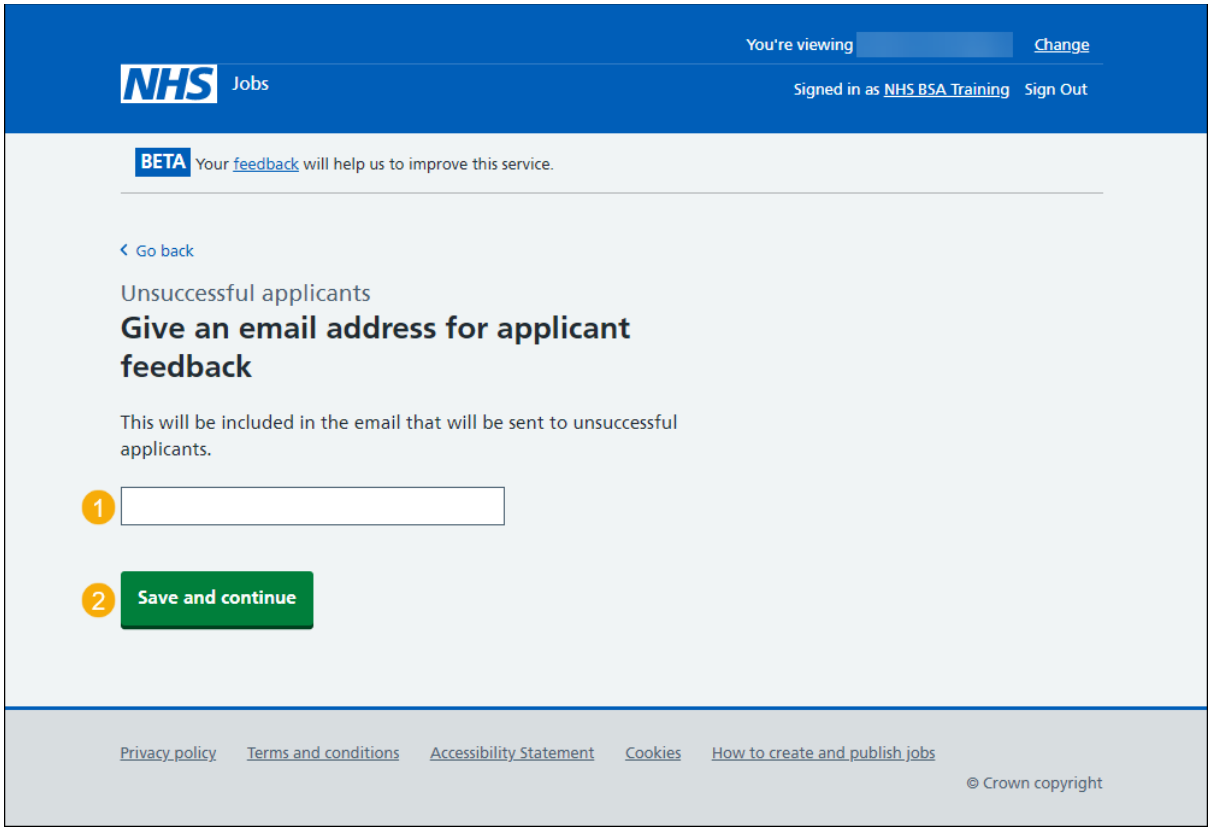
Give an email address for applicant feedback

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.



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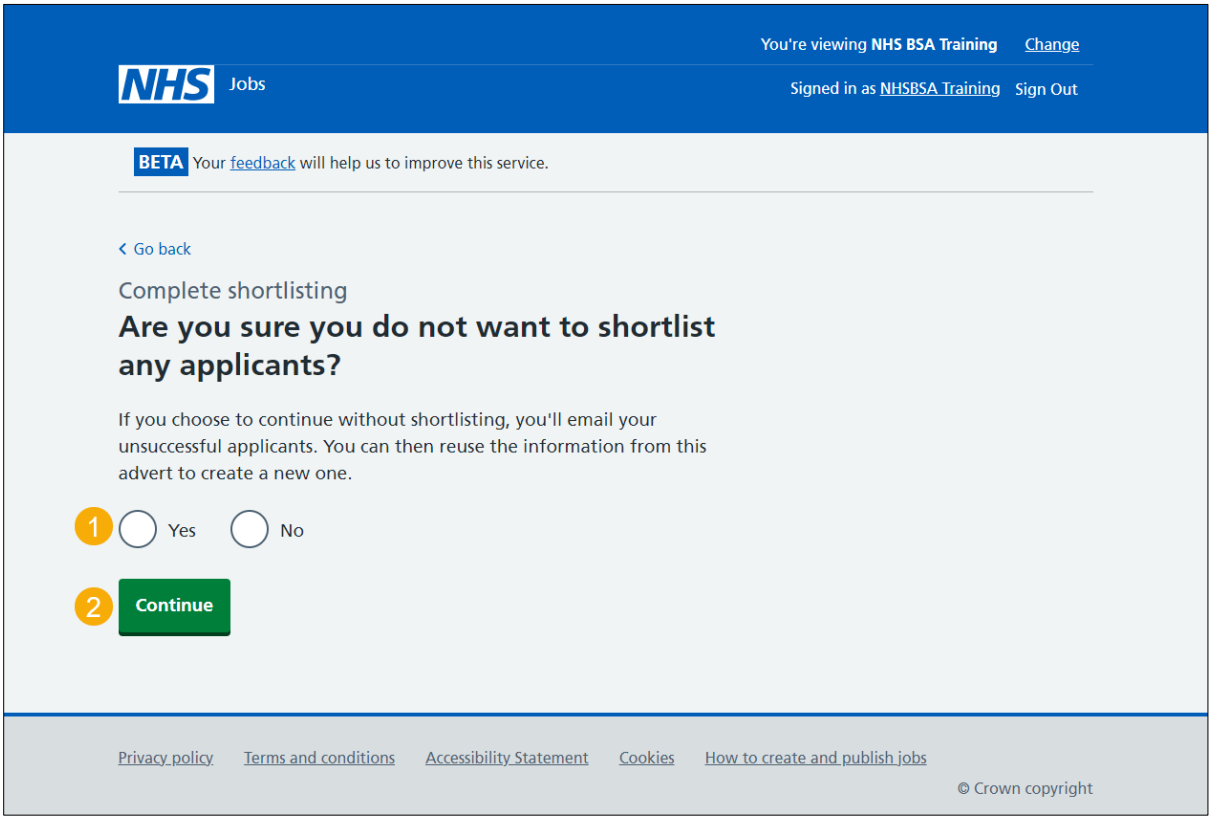
Are you sure you do not want to shortlist any applicants?

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.



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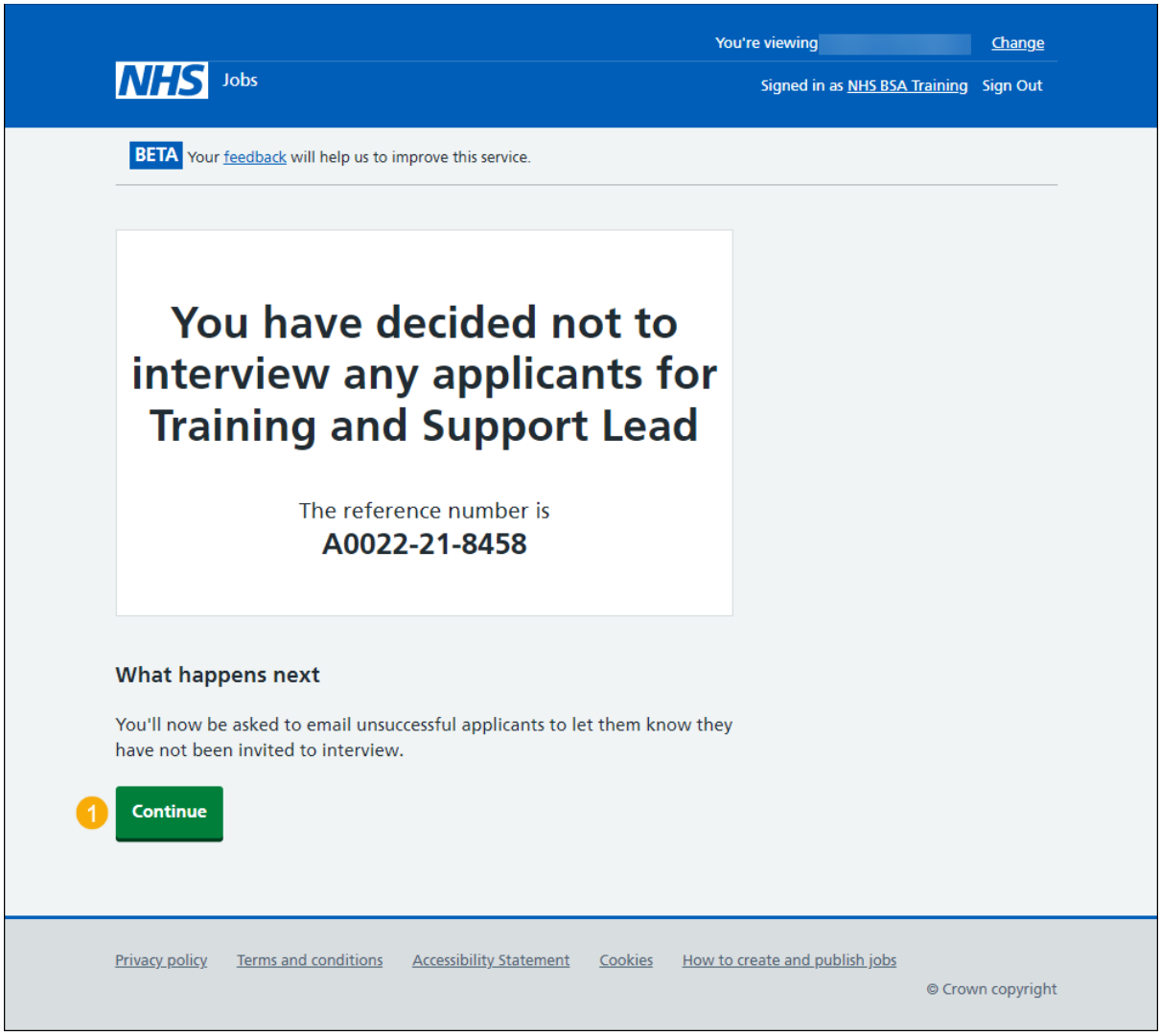
You've decided not to interview any applicants

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.



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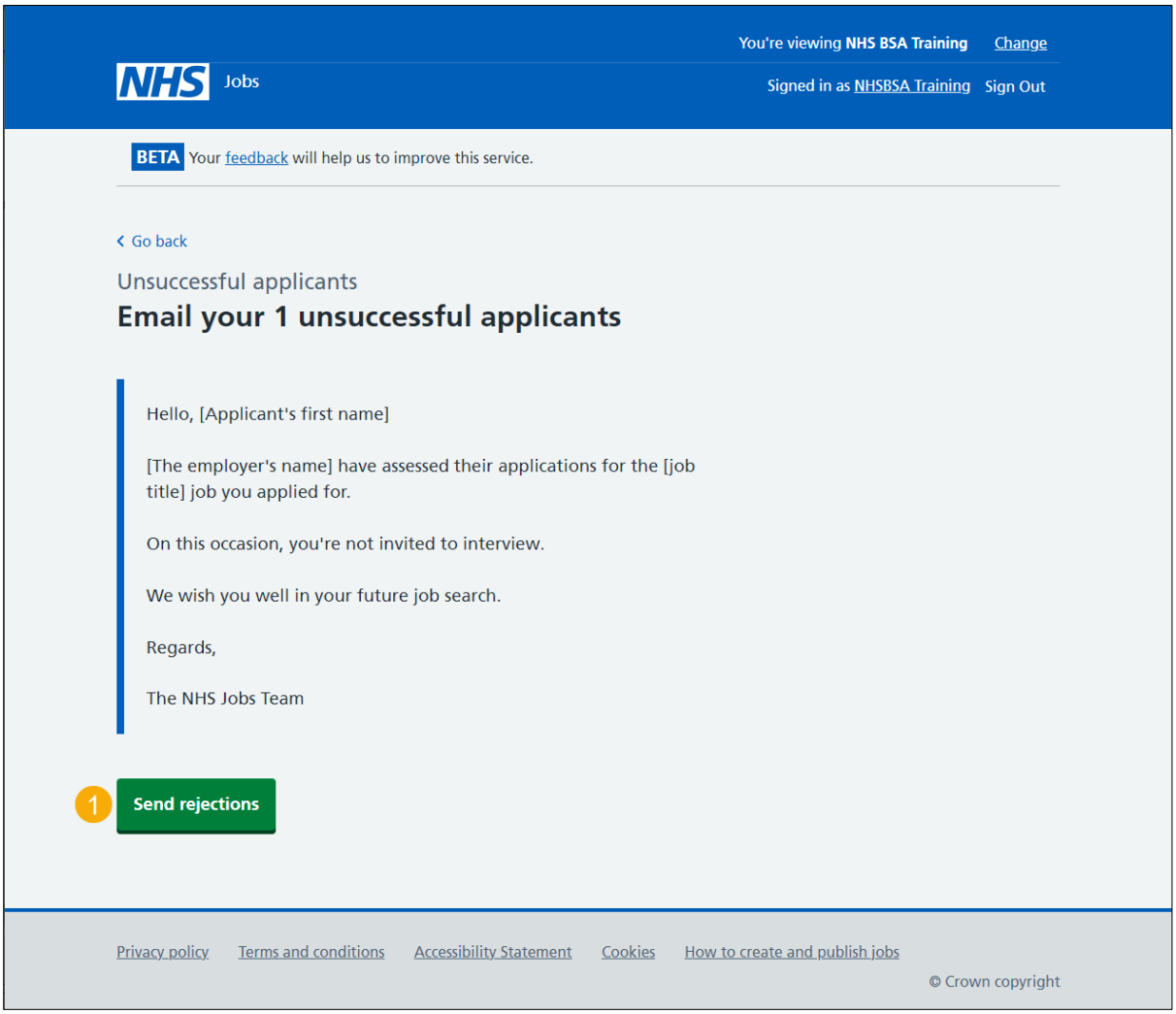
Email your unsuccessful applicants

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.



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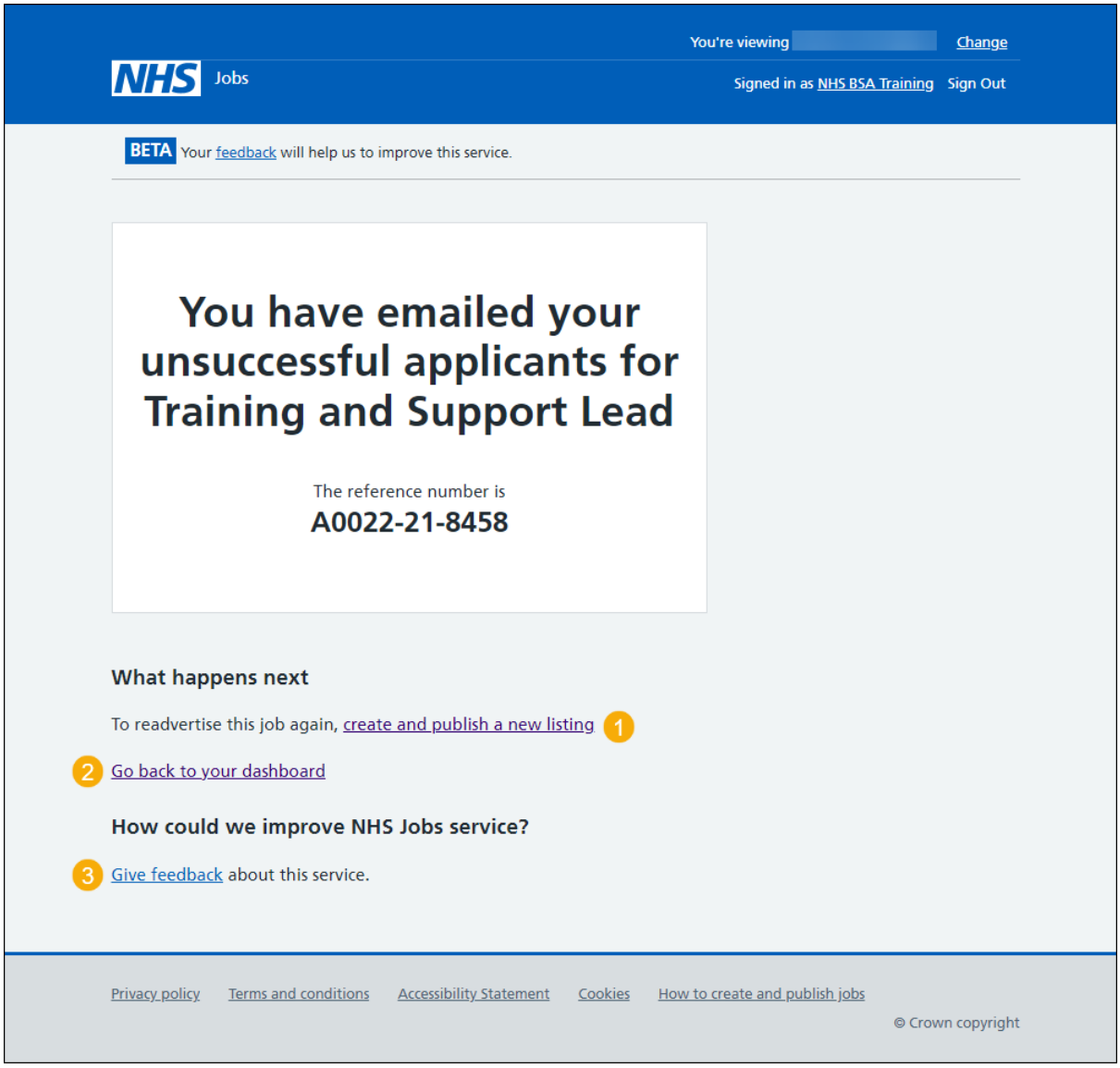
You've emailed your unsuccessful applicants

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).



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.

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