

## 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.

**NHS** Jobs

You're viewing NHSBSA Lee UAT [Change](#)

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

Show tasks for all accounts

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

NHSBSA Lee UAT  
**Dashboard**

Tasks by stage **Listings by user**

Showing tasks for  
All users

<a href="#">Draft</a>	11	<div style="width: 100%;"><div style="width: 100%;"></div></div>
<a href="#">Published</a>	5	<div style="width: 100%;"><div style="width: 100%;"></div></div>
<a href="#">Shortlisting</a>	26 - on track 24, overdue 2	<div style="width: 100%;"><div style="width: 92%;"></div></div>
<a href="#">Interviews</a>	15 - on track 14, overdue 1	<div style="width: 100%;"><div style="width: 93%;"></div></div>
<a href="#">Ready to offer</a>	10 - on track 9, overdue 1	<div style="width: 100%;"><div style="width: 90%;"></div></div>
<a href="#">Conditional offers</a>	14 - on track 4, overdue 10	<div style="width: 100%;"><div style="width: 28%;"></div></div>
Pre-employment checks	0	<div style="width: 100%;"><div style="width: 0%;"></div></div>
<a href="#">Contracts</a>	6	<div style="width: 100%;"><div style="width: 100%;"></div></div>
End recruitment	0	<div style="width: 100%;"><div style="width: 0%;"></div></div>

**What you can do**

[Create a job listing](#)

[Search for a listing](#)

[Search for an applicant](#)

**Manage the account**

[Manage users](#)

[At risk applicants](#)

[Accredited logos](#)

[Key performance indicators \(KPIs\)](#)

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[Criminal convictions and cautions](#)

[Welsh listings](#)

[Moving applicants to other accounts](#)

**Documents and templates**

[Overview of your organisation](#)

[Supporting information library](#)

[Contract templates](#) **1**

[Offer letter templates](#)

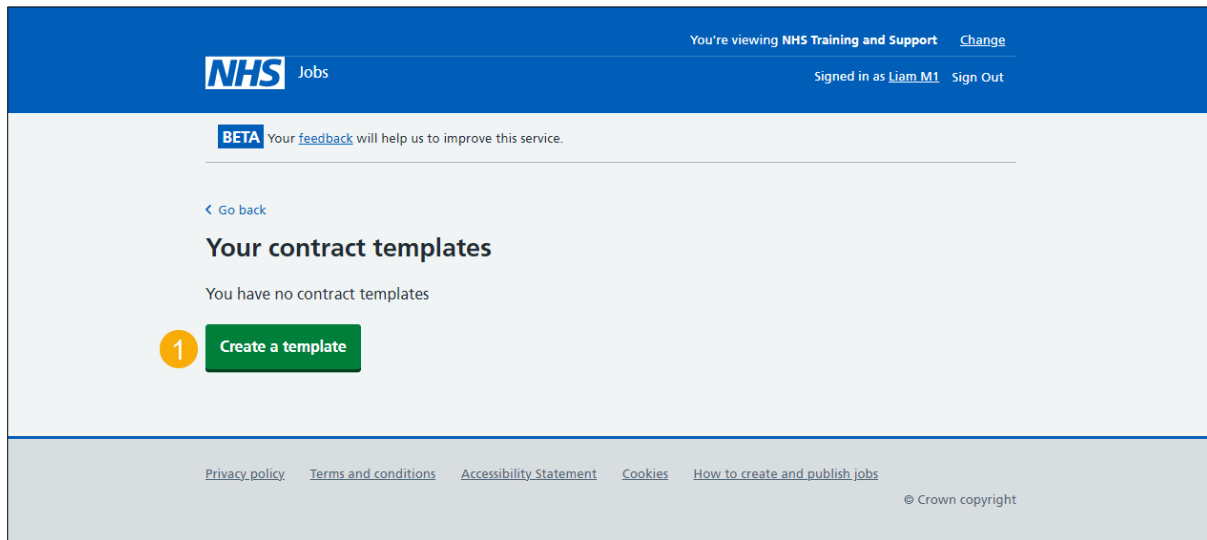
## Your contract templates

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.



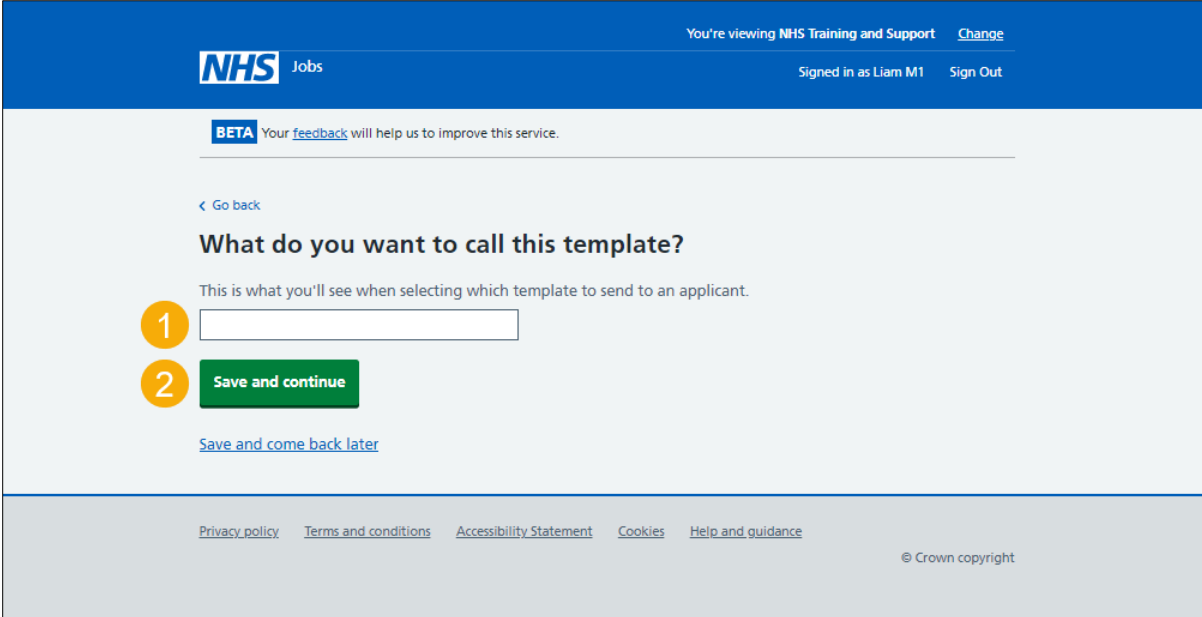
## What do you want to call this template?

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 that says 'Save and come back later'. At the bottom of the page, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance'. The footer contains 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 application 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 content area contains the question 'Which type of agreement is this template for?' followed by 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 also present. 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 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 and 'Jobs' text. On the right side of the header, it says 'You're viewing NHSBSA Lee UAT' with a 'Change' link, and 'Signed in as Lee Mapes' 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 located on the left. The main heading is 'Add a term of employment'. Underneath, there are two sections: 'Type of term' with the example 'Notice period' and a text input field marked with a '1' in a yellow circle; and 'Details of the term' with the example '30 days' and a larger text area marked with a '2' in a yellow circle. At the bottom of the form is a green 'Save and continue' button marked with a '3' in a yellow circle. The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance', along with the text '© 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.

 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
Notice period	30 days <span style="float: right;">1 <a href="#">Change or Remove</a> 2</span>

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 form with the following details:

- Template name:** NHS Jobs (with a 'Change' link and callout 1)
- Type of agreement:** A contract of employment (with a 'Change' link and callout 2)
- Additional principal terms:** Notice period (with a 'Change' link and callout 3)
- Terms and conditions:** (with a 'Change' link and callout 4)

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

The footer of the page includes 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).

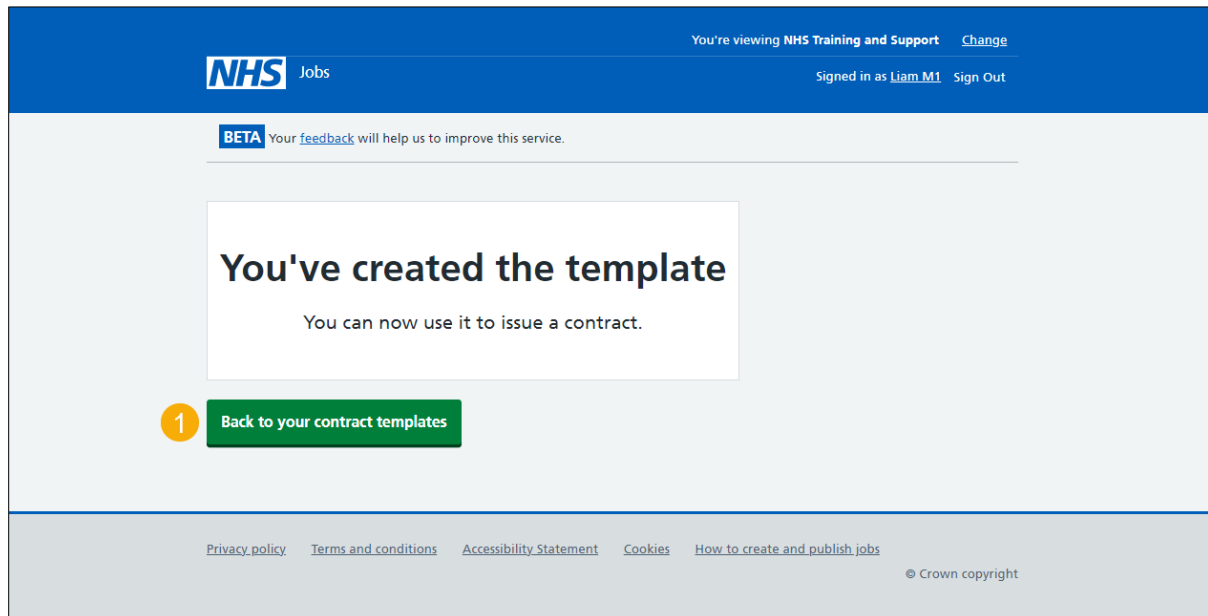
## You've created the template

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.

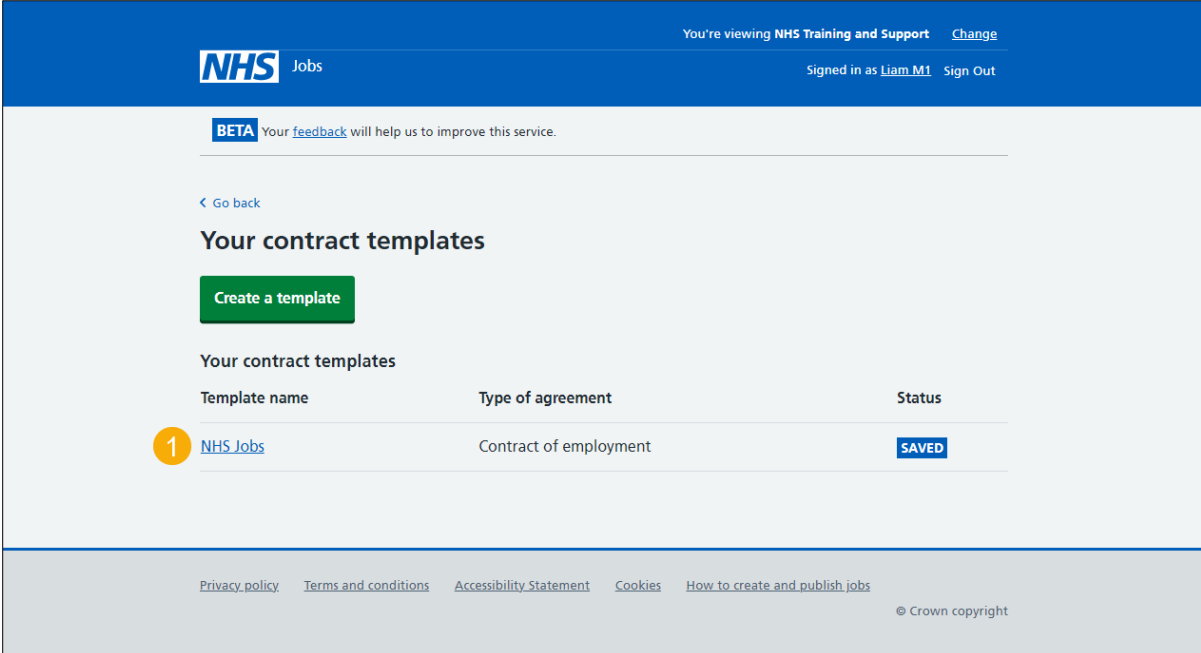
## View your contract templates

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
<a href="#">NHS Jobs</a>	Contract of employment	SAVED

A yellow circle with the number '1' is placed over the 'NHS Jobs' link in the table. 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'.

## 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 displays the 'Manage contract template' interface. At the top, a blue navigation bar contains 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. Below the navigation bar is a 'BETA' banner stating 'Your feedback will help us to improve this service.' The main content area features a 'Go back' link and the title 'NHS Jobs'. A table lists the template details:

Template name	NHS Jobs	<a href="#">Change</a> (1)
Type of agreement	A contract of employment	<a href="#">Change</a> (2)
Additional principal terms	Notice period	<a href="#">Change</a> (3)
Terms and conditions		<a href="#">Change</a> (4)

Below the table, there are instructions for using headings, sub-headings, and lists (bullet and numbered). A sidebar titled 'What you can do' contains three links: [Delete](#) (5), [Preview \(PDF, 4 KB\)](#) (6), and [Download \(PDF, 4 KB\)](#) (7). The footer includes 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 contract template, you've reached the end of this user guide.

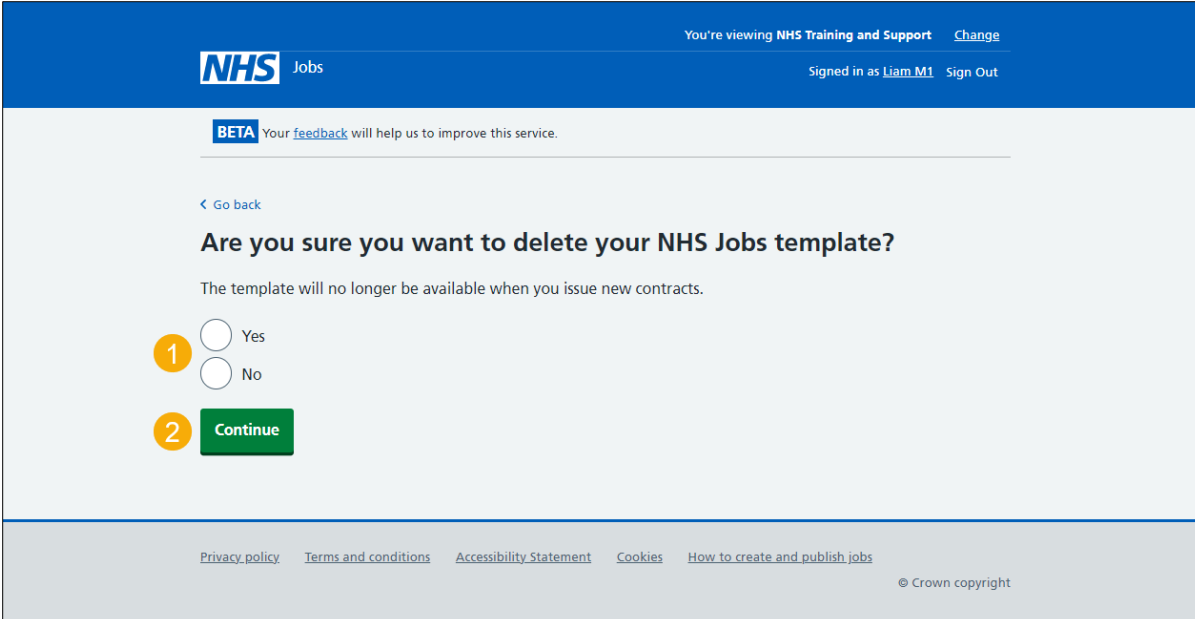
## Are you sure you want to delete your contract template?

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 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 '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.

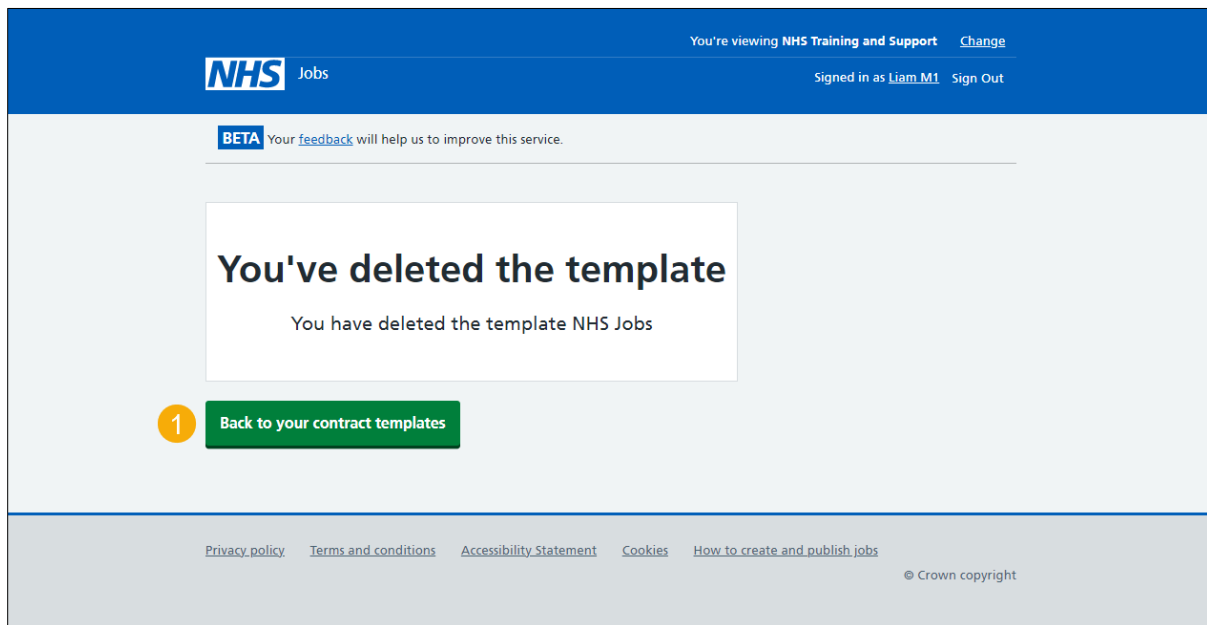
If you don't want to delete your contract template, you've reached the end of this user guide.

## 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.