Recruitment
User Guide
For Managers
(Standard)

Recruitment Process Flow (General)

Key:
VRF = Vacancy Request Form
HR BP = HR Business Partner
HM = Hiring Manager

HM steps
HR steps
HM Notifications

Step 1:
Initiate VRF

You will be notified once the VRF is approved by FR/Director, Finance & HR BP

Step 2:
After final approval by HR BP, the necessary steps will be carried out to publish the vacancy

You will be notified once the advert is live

Step 3:
Once the advert goes live, you will be able to view applicants

You will be notified once the advert closes

Step 4:
Once the advert closes:
1. Complete the shortlist assessment
2. Update the status of applicants
3. Complete the 'Interview Arrangements' form

Step 5:
The HR Team will schedule the interviews and reject any applicants who are not shortlisted for interview

You will be notified once the interviews have been scheduled

Step 6:
Once interviews have concluded:
1. Upload interview notes
2. Update the status of applicants

Step 7:
Your HR BP will contact you to finalise the Ts&Cs and to complete the 'Offer Approval' form

Step 8:
The HR Team will then issue the contract and commence the pre-employment checks

You will be notified once the pre-employment checks commence and will be updated regularly on the progress

Step 9:
Complete the 'Right to Work upload' form

Step 10:
Once the pre-employment checks are complete, the HR BP will contact you to agree the start date

Step 11:
Once the start date is agreed, the applicant will be transitioned to an employee and sent confirmation of their start date. They will also be asked to complete their onboarding activities directly in CoreHR.

Key:
VRF = Vacancy Request Form
HR BP = HR Business Partner
HM = Hiring Manager

HM steps

HR steps

HM Notifications

Recruitment Process Flow (Rolling Vacancies)

Step 1:
Initiate VRF (with a max number of vacant positions for the year i.e. 10 or 20)

You will be notified once the VRF is approved by FR/Director, Finance & HR BP

Step 2:
After final approval by HR BP, the necessary steps will be carried out to publish the rolling vacancy/advert

You will be notified once the advert is live

Step 3:
Once the advert goes live, you will be able to view the applicants

You will be notified when applicants apply

Step 4:
Once applications are received :
1. Complete the shortlist assessment
2. Update the status of applicants

Step 5:
The HR Team will reject applicants who are not shortlisted for interview

Step 6:
1. Schedule interviews (send self-declaration form, for roles that involve Regulated Activity)
2. Once interviews have concluded:
   - Upload interview notes/self-declaration
   - Update the status of applicants

Step 7:
Your HR BP will contact you to finalise the Ts&Cs and to complete the 'Offer Approval' form

Step 8:
The HR Team will then issue the contract and commence the pre-employment checks

You will be notified once the pre-employment checks commence and will be updated regularly on the progress

Step 9:
Complete the 'Right to Work upload' form

Step 10:
Once the pre-employment checks are complete, the HR BP will contact you to agree the start date

Step 11:
Once the start date is agreed, the applicant will be transitioned to an employee and sent confirmation of their start date. They will also be asked to complete their onboarding activities directly in CoreHR.

Recruitment Process Flow (Cheder Readers - Under 18s)

Key:
VRF = Vacancy Request Form
HR BP = HR Business Partner
CHT = Cheder Head Teacher

CHT steps

HR steps

CHT Notifications

Step 1:
Initiate VRF (with a max number of vacant positions for the year i.e. 10 or 20)

You will be notified once the VRF is approved by FR/Director, Finance & HR BP

Step 2:
After final approval by HR BP, the necessary steps will be carried out to publish a rolling vacancy. Applicants will be asked to state their preferred Cheder location

Note: the adverts will include the following wording:

Please note, this vacancy applies to applicants under the age of 18 only. If you are aged 18 or over, please apply via the following vacancy: [URL]

You will be notified once the advert is live

Step 3:
Once the advert goes live, you will be able to view applicants who have indicated a preference of working at your Cheder

You will be notified when applicants apply

Step 4:
Once applications are received:
1. Complete the shortlist assessment
2. Update the status of applicants

Step 5:
The HR Team will reject any applicants who are not shortlisted for interview

Step 6:
1. Schedule interviews (send self-declaration form, for roles that involve Regulated Activity)
2. Once interviews have concluded:
   - Upload interview notes/self-declaration
   - Update the status of applicants
   - Action verbal offer (no start date)
   - Complete the 'Offer Approval (Standard)' form

Step 8:
The HR Team will issue the contract and commence the pre-employment checks (only 1 reference required)

You will be notified once the pre-employment checks commence and will be updated regularly on the progress

Step 9:
Complete the 'Right to Work upload' form, verify the reference & complete any other pre-employment checks

Step 10:
Once the pre-employment checks are complete, the HR BP will contact you to agree the start date

Step 11:
Once the start date is agreed, the applicant will be transitioned to an employee and sent confirmation of their start date. They will also be asked to complete their onboarding activities directly in CoreHR.

Recruitment Process Flow (Cheder Readers – Aged 18 and over)

Key:
VRF = Vacancy Request Form
HR BP = HR Business Partner
CHT = Cheder Head Teacher

CHT steps

HR steps

CHT Notifications

Step 1:
Initiate VRF (with a max number of vacant positions for the year i.e. 10 or 20)

You will be notified once the VRF is approved by FR/Director, Finance & HR BP

Step 2:
After final approval by HR BP, the necessary steps will be carried out to publish a rolling vacancy. Applicants will be asked to state their preferred Cheder location

You will be notified once the advert is live

Note: the adverts will include the following wording:

Please note, this vacancy applies to applicants aged 18 and over only. If you are under 18, please apply via the following vacancy: [URL]

Step 3:
Once the advert goes live, you will be able to view applicants who have indicated a preference of working at your Cheder

You will be notified when applicants apply

Step 4:
Once applications are received:
1. Complete the shortlist assessment
2. Update the status of applicants

Step 5:
The HR Team will reject any applicants who are not shortlisted for interview

Step 6:
1. Schedule interviews (send self-declaration form, for roles that involve Regulated Activity)
2. Once interviews have concluded:
   - Upload interview notes/self-declaration
   - Update the status of applicants
   - Action verbal offer (no start date)
   - Complete the 'Offer Approval (Standard)' form

Step 8:
The HR Team will issue the contract and commence the pre-employment checks

You will be notified once the pre-employment checks commence and will be updated regularly on the progress

Step 9:
Complete the 'Right to Work upload' form, verify the references & complete any other pre-employment checks

Step 10:
Once the pre-employment checks are complete, the HR BP will contact you to agree the start date

Step 11:
Once the start date is agreed, the applicant will be transitioned to an employee and sent confirmation of their start date. They will also be asked to complete their onboarding activities directly in CoreHR.

Contents

1. Overview

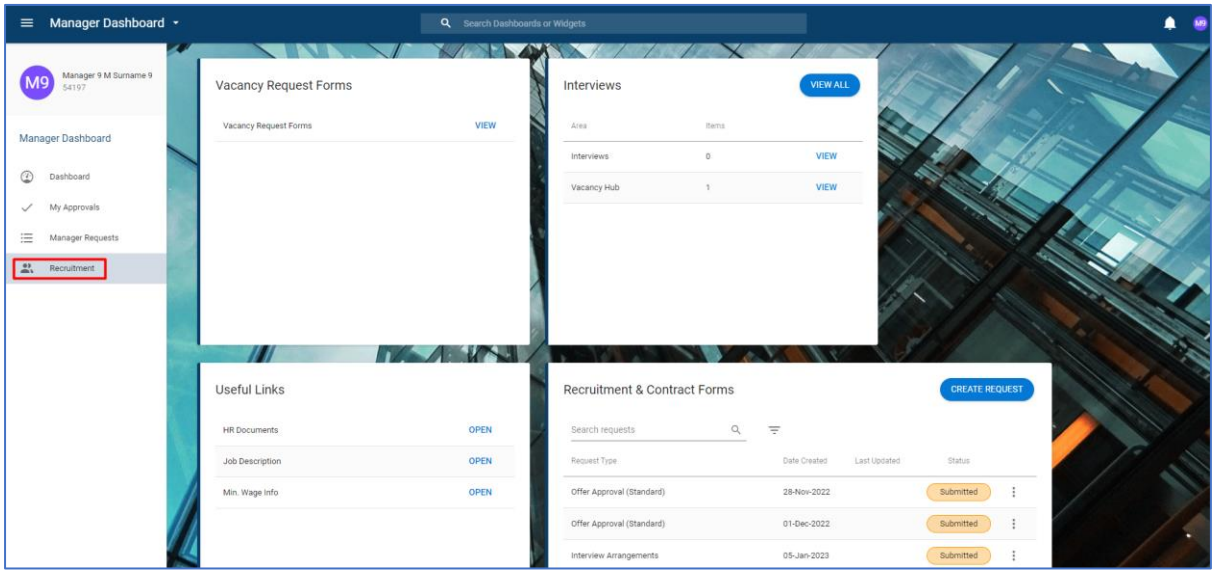
1.1. Purpose of this Guide

The purpose of this document is to provide detailed guidance on the Recruitment-related tasks for Managers in CoreHR. This guide outlines how you can:

- Submit and copy a Vacancy Request Forms (VRF)
- View applications
- Complete shortlisting
- Progress applicants
- View interview details
- Action an offer for a successful applicant

To access the new Recruitment screens, within the Manager Dashboard navigate to the Recruitment tab. There are four available sections:

- **Vacancy Request Forms (VRF):** submit, copy, and view the progress of VRFs
- **Interviews:** view your vacancies, view/progress applicants, and view upcoming interviews
- **Useful Links:** helpful documents and information to guide you during the Recruitment process
- **Recruitment & Contract Forms:** initiate any other Recruitment-related forms e.g. Interview Arrangements, Offer Approvals and Right to Work



The following sections of the user guide provide detailed instructions for each of the steps within the Recruitment process, and each of the sections outlined above.

Note
The Rabbinic Recruitment process is different to the 'Standard' process outlined within this guide. The steps to raise the Rabbinic Vacancy Request Form are outlined within the Financial Representative (FR) / Director Approval User Guide. In addition, you will be advised of next steps by the HR Director and/or Director of Communities.

2. Vacancy Request Forms (VRFs)

2.1. Submitting a Vacancy Request Form (VRF)

The Vacancy Request Form (VRF) replaces the previous Vacancy Notification Form (VNF) and will usually be initiated by the Hiring Manager, or Synagogue Administrator, if applicable.

Note
A draft **VRF** can be saved to come back to later, but only once all mandatory fields (indicated with an asterisk) have been populated. It is therefore essential that prior to completing the form, you have the following information to hand:

- Expected Start Date - provide a rough estimate of when you want the successful applicant to start (subject to any notice period and pre-employment checks)
- Finance Department/Sub-Department – refer to further guidance available here. If you are unsure, contact your designated Management Accountant for clarification (Management Accountant Matrix)
- Accommodation availability (if applicable)
- Working hours/pattern and weeks per year
- Advert Closing Date
- DBS and Regulated Activity information – refer to "Regulated Activity Flow chart" and "List of roles that require DBS checks" available here
- Preferred Advertising Publication(s)
- Cost Centre and Budget/Grant Information
- Reason for the Vacancy
- Salary (including pro-rata salary, if applicable)
- Job Description, Advert Wording and any other documents (Word Versions only)

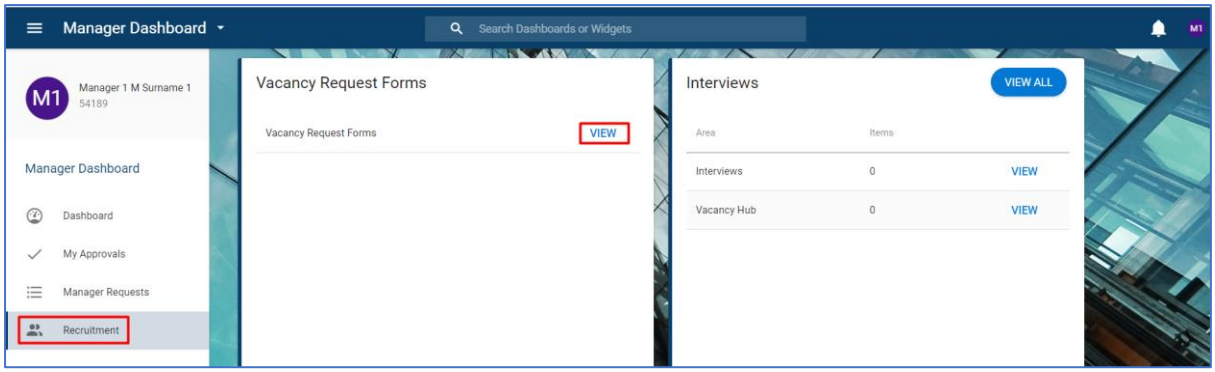
Further guidance for each of these fields is detailed below.

You may wish to review each section of the Vacancy Request form prior to populating the form to ensure you have the necessary information.

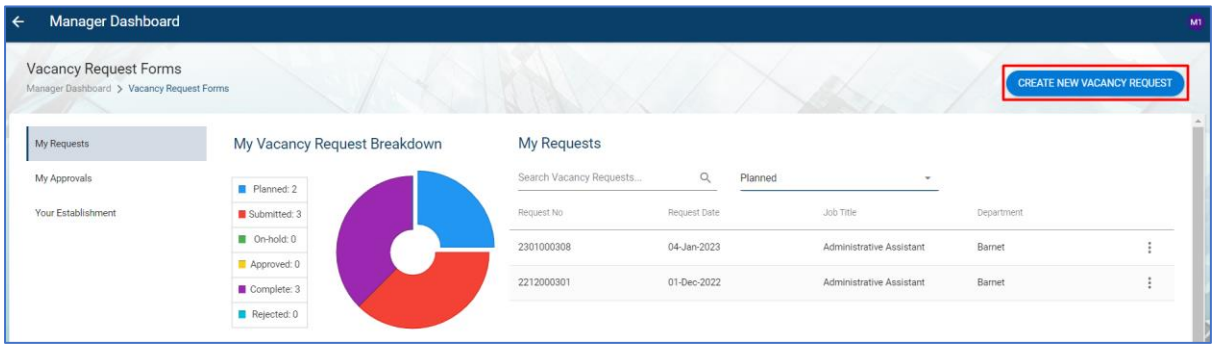
Note
If a Synagogue Administrator raises a request on behalf of someone else, the Hiring Manager will be bypassed in terms of approvals and notifications, and they will not be able to view the approved request.

To initiate the VRF:

- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Vacancy Request Forms section, click 'View':

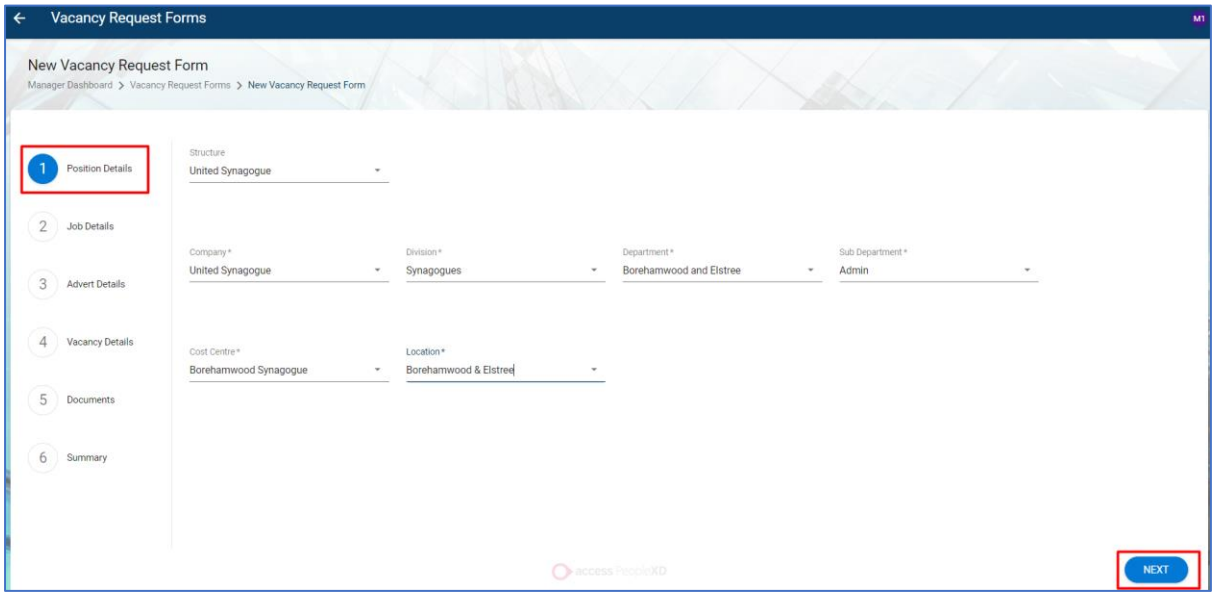


- Click ‘Create New Vacancy Request’



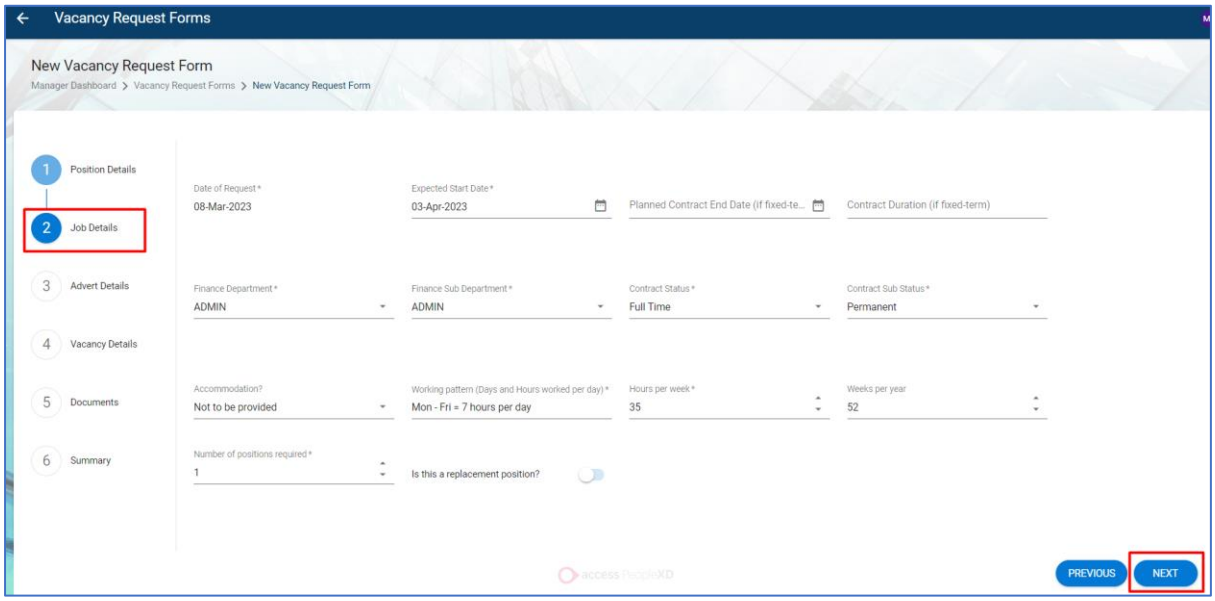
- Populate each of the sections (mandatory fields are indicated with an asterisk):

- **1. Position Details:**



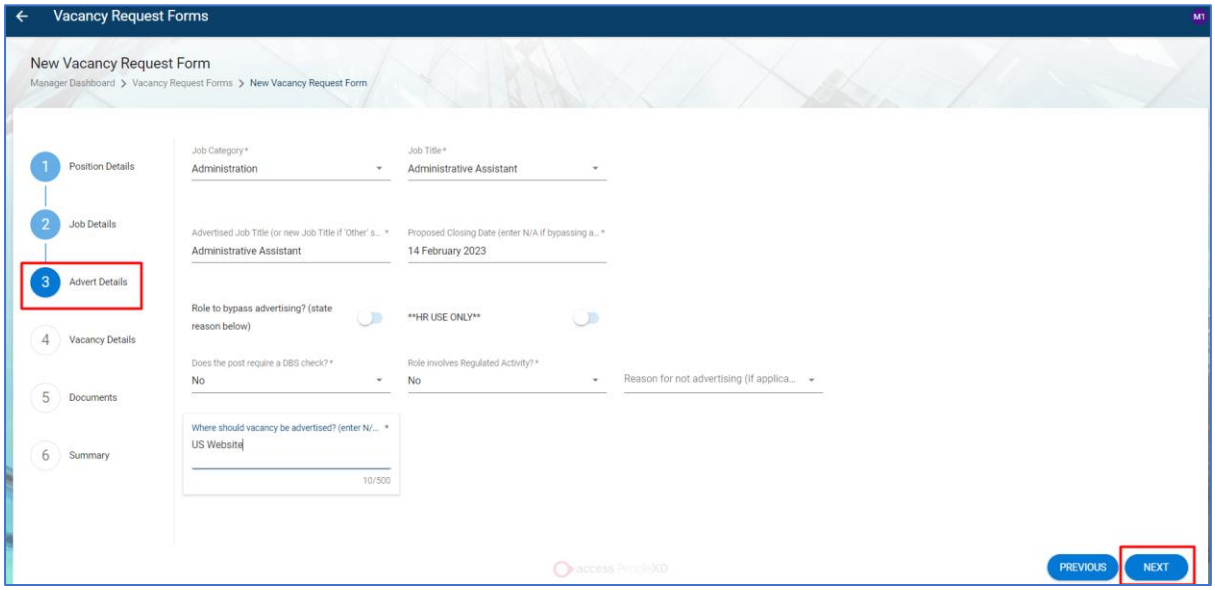
  - Complete all fields, providing details of where the position sits within the organisation and click ‘Next’.

- **2. Job Details:**



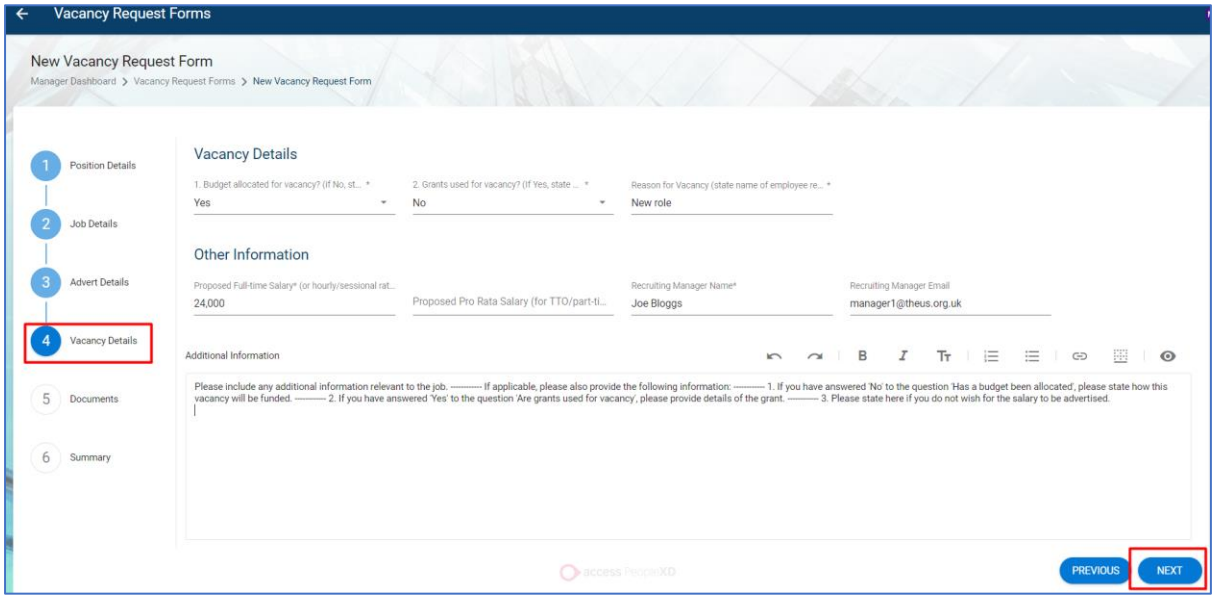
- ***Date of Request:*** this will pre-populate to today's date
- ***Expected Start Date:*** provide a rough estimate of when you want the successful applicant to start (subject to any notice period and pre-employment checks)
- ***Planned Contract End Date* and *Contract Duration*:** complete these if this is a fixed-term position
- ***Finance Department* and *Finance Sub Department:*** refer to further guidance available here. If you are unsure, contact your designated Management Accountant for clarification (Management Accountant Matrix)
- ***Contract Status* and *Contract Sub Status*:** select from the dropdown list
- ***Accommodation:*** indicate whether accommodation will be provided
- ***Working Pattern:*** provide the days worked and hours to be worked per day e.g. Mon-Fri 8 hours per day. Please note, if you require additional space to provide this information, you can use the 'Additional Information' textbox available within Section 4 (Vacancy Details). You will be able to reconfirm the working pattern details at the offer stage
- ***Hours per week:*** provide the total number of hours to be worked per week. You will be able to reconfirm the working hours at the offer stage
- ***Weeks per year:*** adjust the number in this field, if required, i.e. if the request is for a term-time only (TTO) position
- ***Number of positions:*** this will usually be one, unless recruiting multiple employees into a position e.g. for Summer Camp
- ***Is this a replacement position?*** if this is an existing position and an employee is being replaced, please click the toggle (the darker blue colour indicates 'Yes')

- 3. **Advert Details:**



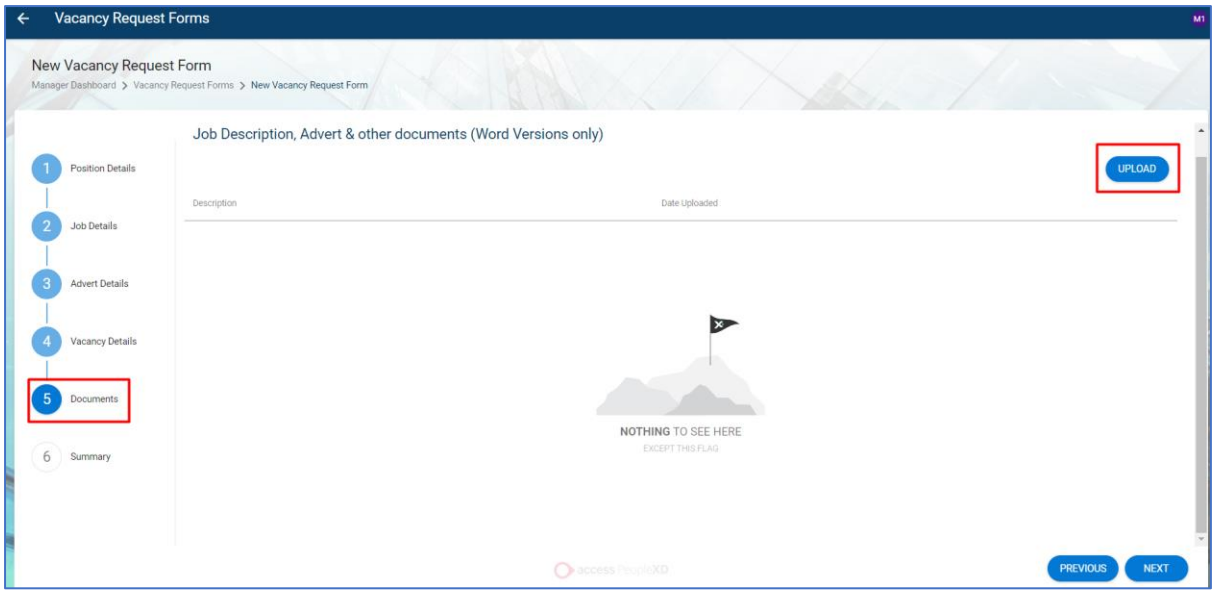
- ***Job Category:*** select the relevant Job Category from the dropdown list (this allows applicants to filter by Job Category to identify suitable vacancies)
- ***Job Title:*** select the job title from the dropdown list. If this is a new position or the job title you require is not listed, select *** Other - New Job Title ***** and add the new job title in the next field
- ***Advertised Job Title:*** input the job title (this field is required even if it is the same as the previous Job Title field)
- ***Proposed Closing Date:*** date on which you would like the advert to close
- ***Role to bypass advertising?:*** disregard this field unless it is a role that meets the bypass criteria, separate guidance is available here.
- **DBS and Regulated Activity fields:** complete both, refer to the "Regulated Activity Flow chart" and "List of roles that require DBS checks" available here for further guidance
- ***Where should vacancy be advertised?:*** indicate where you would like the vacancy to be advertised. Further guidance is available here
- Click 'Next'

- **4. Vacancy Details:**

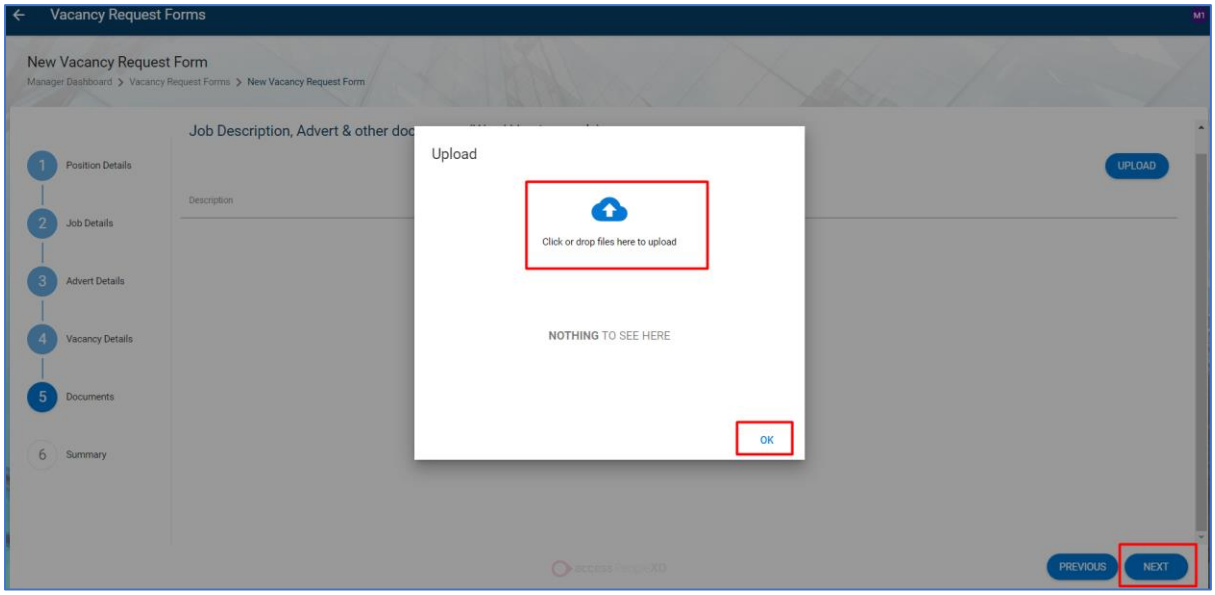


- ***Budget allocated for vacancy?:*** confirm whether a budget has been allocated for the vacancy. If 'No', state how this vacancy will be funded within the 'Additional Information' textbox below
- ***Grants used for vacancy?:*** confirm whether any grants are being used for this vacancy. If 'Yes', please provide details of the grant within the 'Additional Information' textbox below
- ***Reason for Vacancy:*** provide the justification for the vacancy i.e. provide the name of the employee that is being replaced, if applicable, or if it is a new post, state why the new post is required
- ***Proposed Full-Time Salary:*** provide the full-time salary, or for hourly/sessional rates (if this is not a salaried position) ensure you note 'per session' / 'per hour'. If required, use the Full Time Equivalent (FTE) Salary Calculator
- ***Proposed Pro Rata Salary:*** for part-time or term-time (TTO) posts, provide the pro-rated salary. If required, use the Term Time Salary Calculator
- ***Recruiting Manager Name and Email*:** provide the details of the Hiring Manager who will be responsible for the Recruitment
- ***Additional Information:*** provide any further information, as required. If you have answered 'No' to the budget or 'Yes' to the grant questions, please provide additional information here

- **5. Documents:**

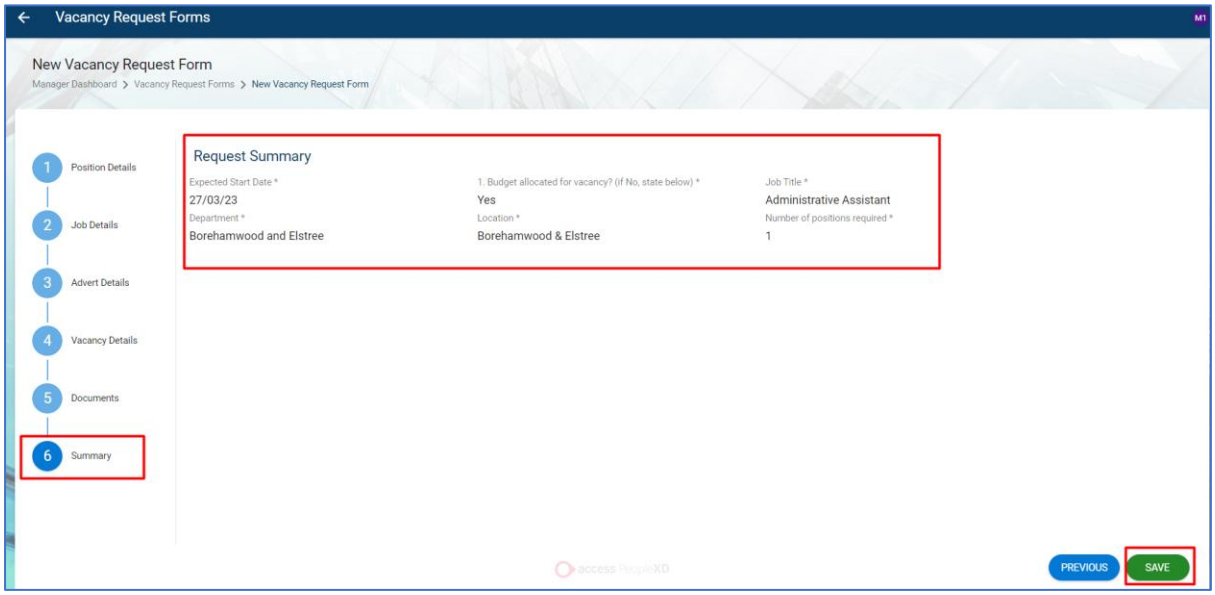


- Provide the Word versions of the Job Description, Advert wording and any other documents by clicking on the 'Upload' button:

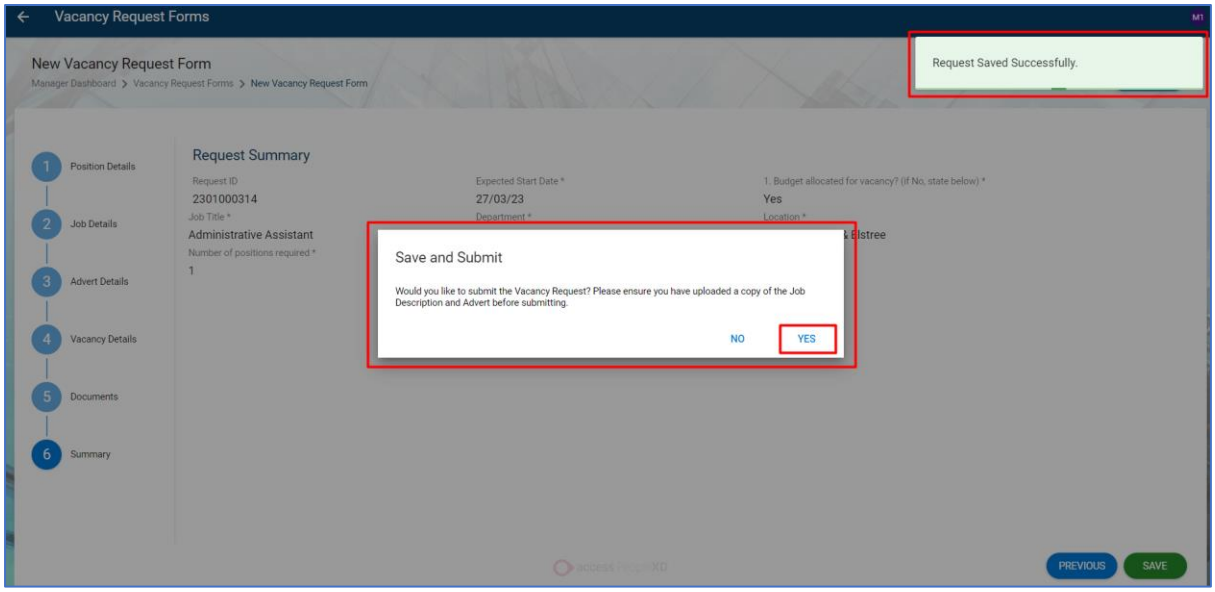


- Job Description templates are available here or within the 'Useful Links' section within the Recruitment tab
- Click 'Next'

- **6. Summary:**
  - Review the Request Summary prior to submitting the form:



- Once all sections are complete, submit your request by clicking 'Save' then 'Yes' on the pop-up message:

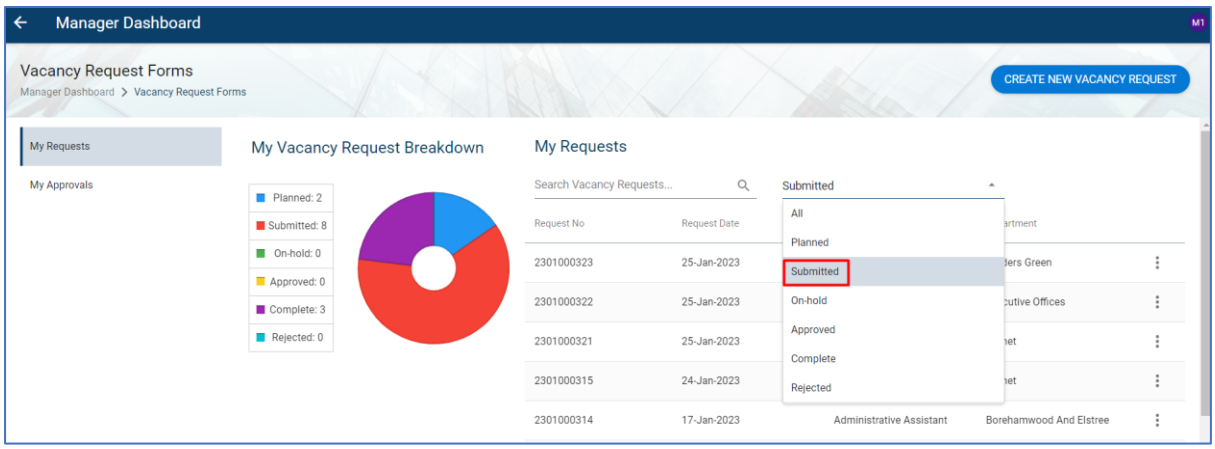


Note
You can save the Vacancy Request Form (VRF) to complete at a later stage; simply click 'Save' and 'No' on the pop-up message. Please note, you can only save the VRF once all mandatory fields have been completed (indicated by an asterisk).
To access the saved VRF, within the Manager Dashboard, navigate to the Recruitment tab, then within the Vacancy Request Forms section, click 'View'. Click on the ⋮ button next to the relevant vacancy and select 'Edit'.

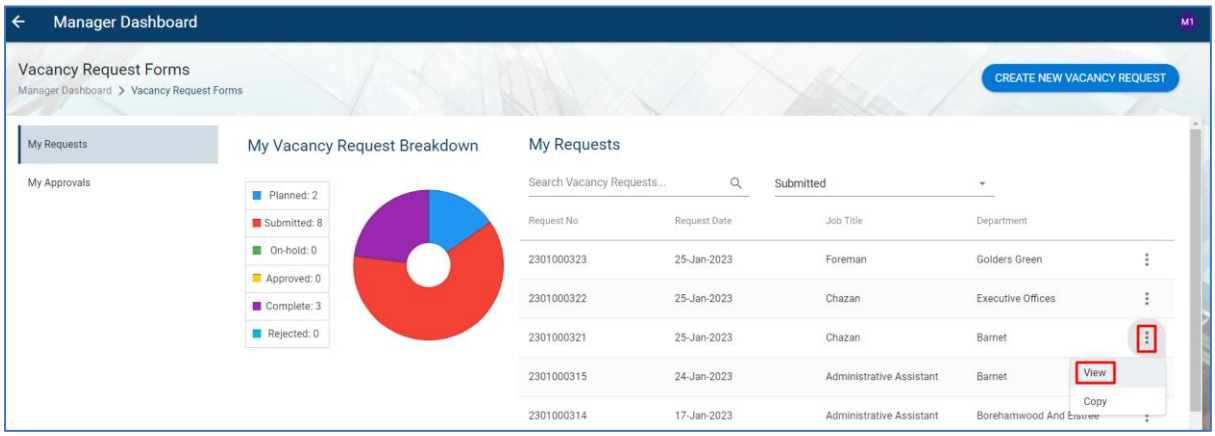
- Once submitted, the VRF will proceed to the next stages of approval (i.e. FR, Finance and HR).

Note
If an FR/Director submits a VRF, they will also need to approve the form in their remit as FR/Director.

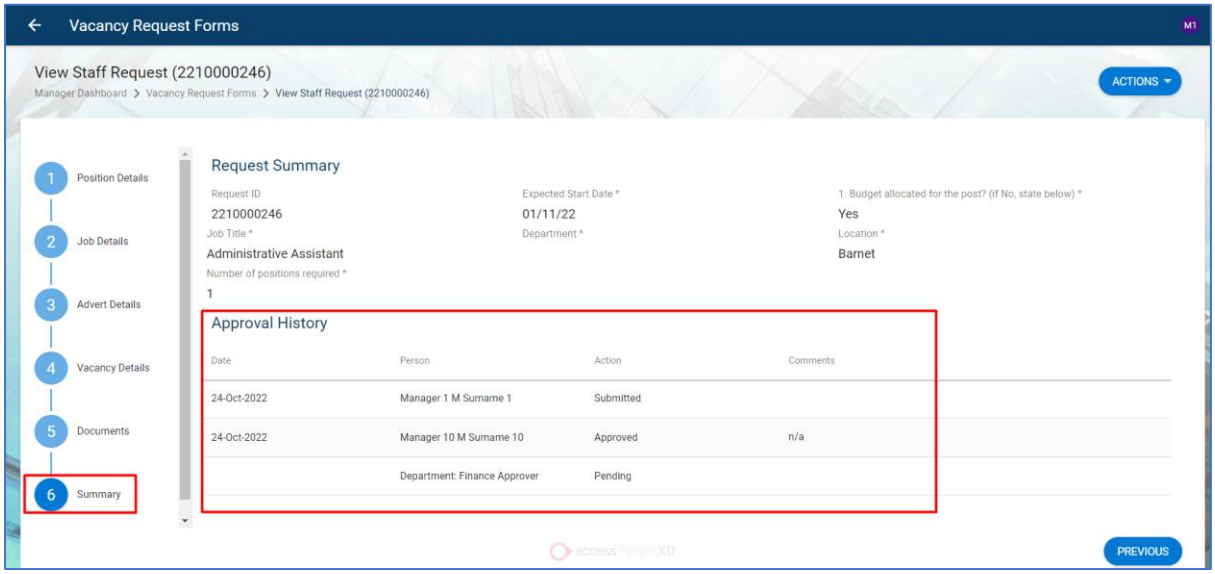
- To track the progress of the approvals:
  - Within the Manager Dashboard, navigate to the Recruitment tab
  - Then within the Vacancy Request Forms section, click 'View'
  - In the 'My Requests' section select 'Submitted' from the dropdown list (once the vacancy has been approved by all parties, it will be viewable within the 'Complete' status dropdown):



  - Click on the ⋮ button next to the relevant vacancy and select 'View':



- Navigate to Section 6 (Summary) where you can review the Approval History; you will be kept informed via email of the approval progress:

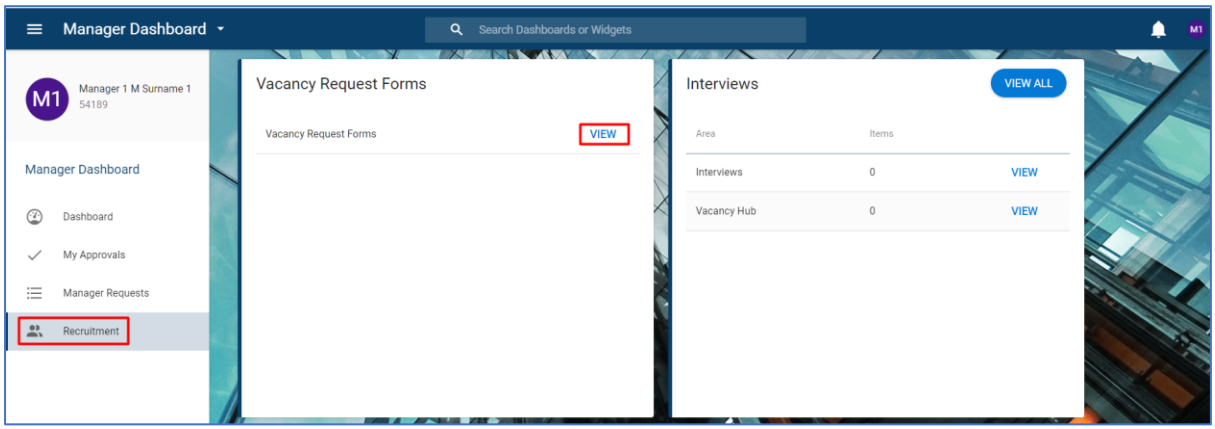


Once the Vacancy Request has been approved by all parties, the HR team will carry out their activities to make the vacancy live and you will be notified via email.

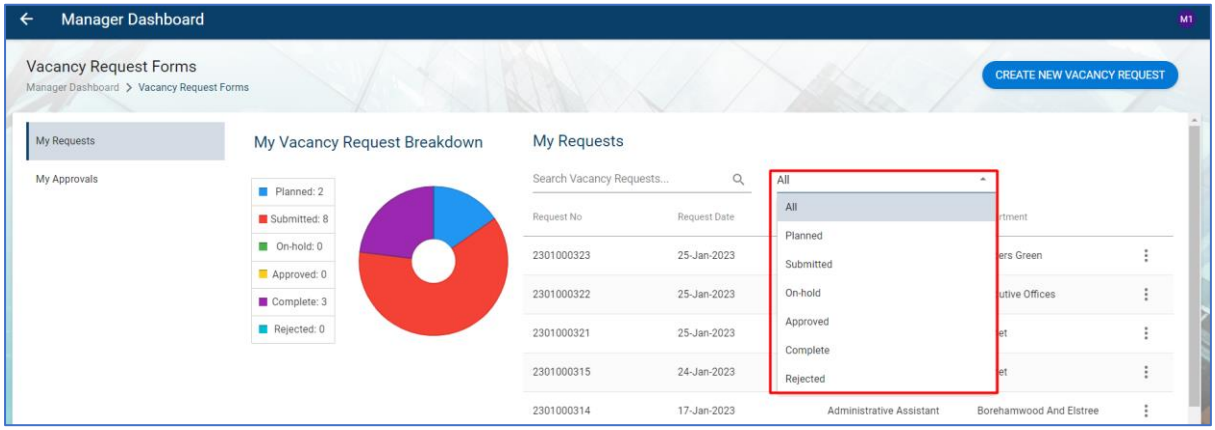
2.2. Copying a Vacancy Request Form (VRF)

It is possible to copy a previous VRF. You may wish to do this if a VRF is rejected and you need to re-submit, or if you recruit for a similar role in the future. To copy a previous form:

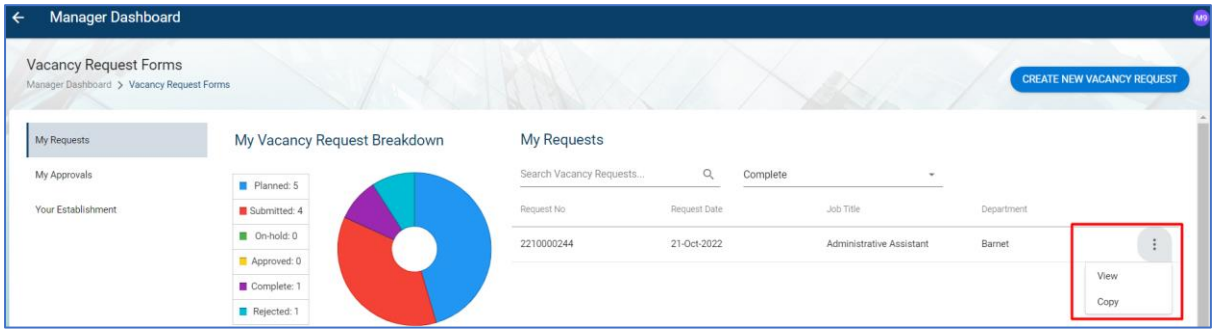
- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Vacancy Request Forms section, click 'View':



- Select 'All' from the status dropdown list to view all VRFs (alternatively select 'Complete' to view only approved VRFs):



- Click on the ⋮ button next to the relevant vacancy and select 'Copy'



- Update the fields as required within the form, then submit the form in the usual way (as outlined above)

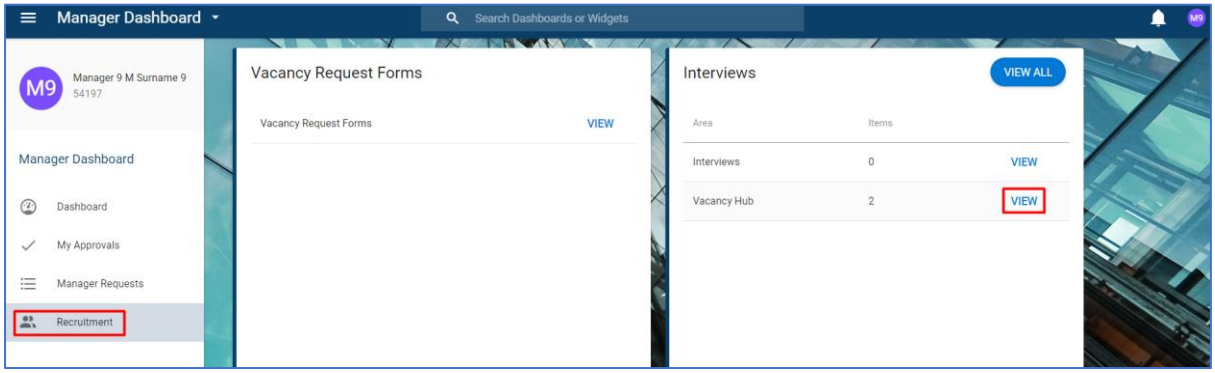
3. Shortlisting

All panel members (those involved in the hiring process) will be notified via email once the advert for the vacancy is live and informed of next steps. Panel members will be able to view applicants prior to the closing date, but they should wait until after the closing date to complete the applicant shortlist.

3.1. Viewing applicant(s)

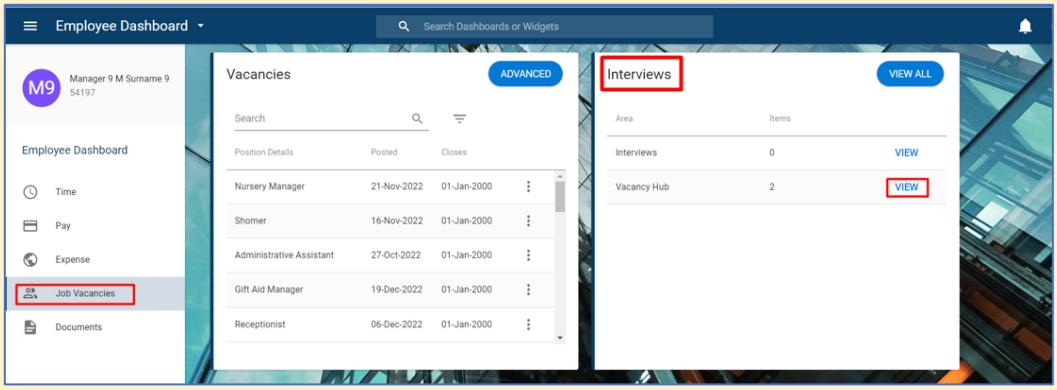
To view applicants:

- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Interviews Section, click 'View' next to the Vacancy Hub:



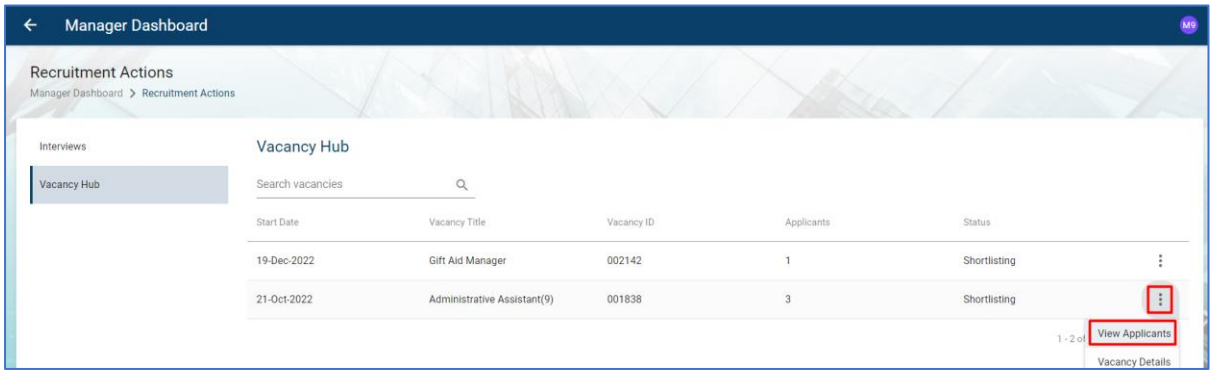
Note

If you are a panel member but are not a line manager, you will not have access to the Manager Dashboard. To view vacancies and applicants for which you are a panel member, navigate to the Job Vacancies tab (on the left-hand side), in the Interviews section click 'View' next to the Vacancy Hub then continue with the below steps.

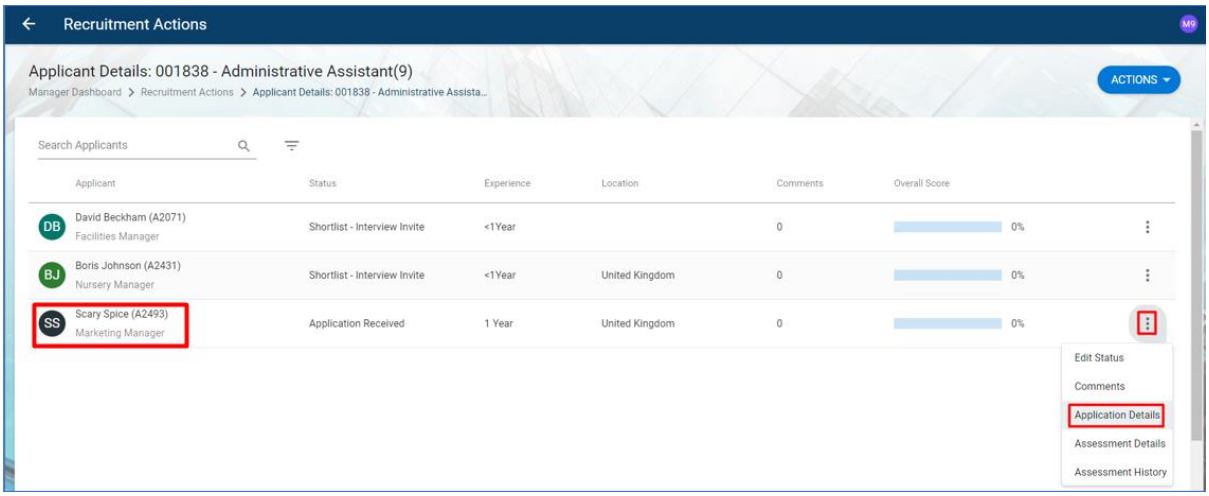


Please note that throughout this guidance, as you are not a manager, you will need to follow the above steps whenever you need to access the Interviews section.

- Click on the ⋮ button next to the relevant vacancy and select 'View Applicants':



- You can view each application by clicking on the ⋮ button next to the applicant's name and selecting ‘Application Details’:



Note
The figure within the ‘Experience’ column is a rough guide; if there are any gaps in an applicant’s employment history, the system will only count their experience back to the most recent gap.

Panel members must not contact applicants directly; the HR team will liaise with candidates once you have followed the steps below to complete the shortlist and progress the applicants.

3.2. Completing the shortlist

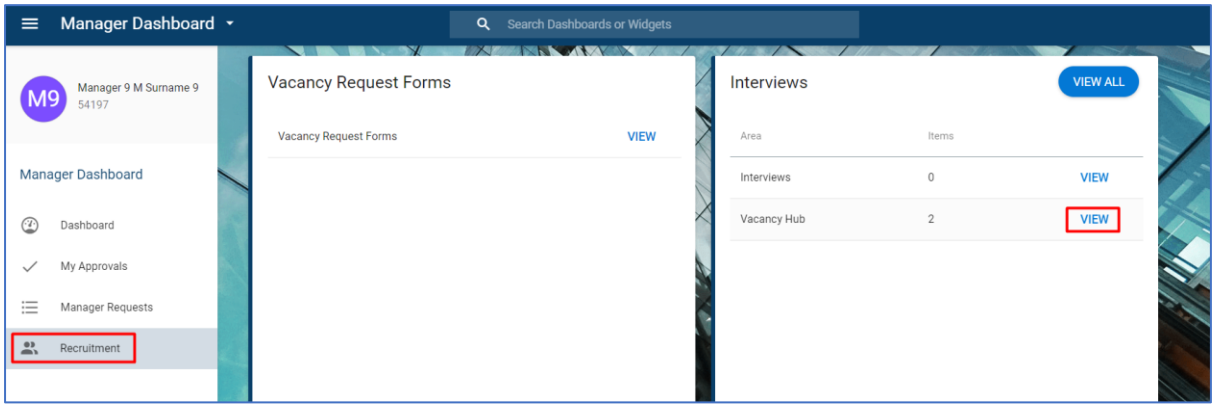
All panel members will be notified via email once the advert for the vacancy has closed and informed of the next steps.

You have the option to shortlist/score applicants individually or as a group:

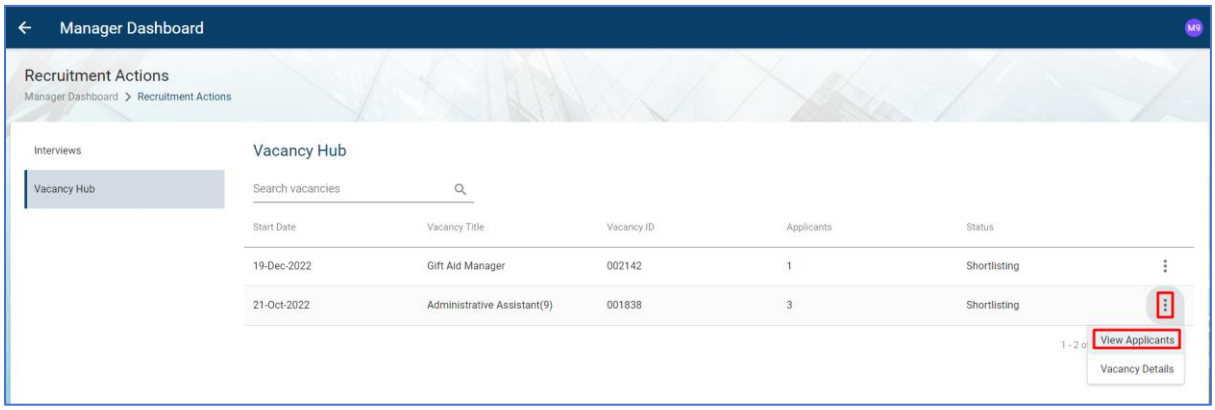
(A) If the shortlisting panel are assessing/scoring applicants individually:
- Each panel member should complete the assessment using the template provided via email
- Once completed, the template should be emailed to the Hiring Manager.
- If panel members scoring is different, a discussion should take place to reach a consensus score. The Hiring Manager should then input the consensus score for each applicant, within the 'Assessment Details' section.

(B) If the shortlisting panel are assessing/scoring as a group, a discussion should take place to reach a consensus score; the Hiring Manager should input the consensus score for each applicant, within the 'Assessment Details' section (see below).

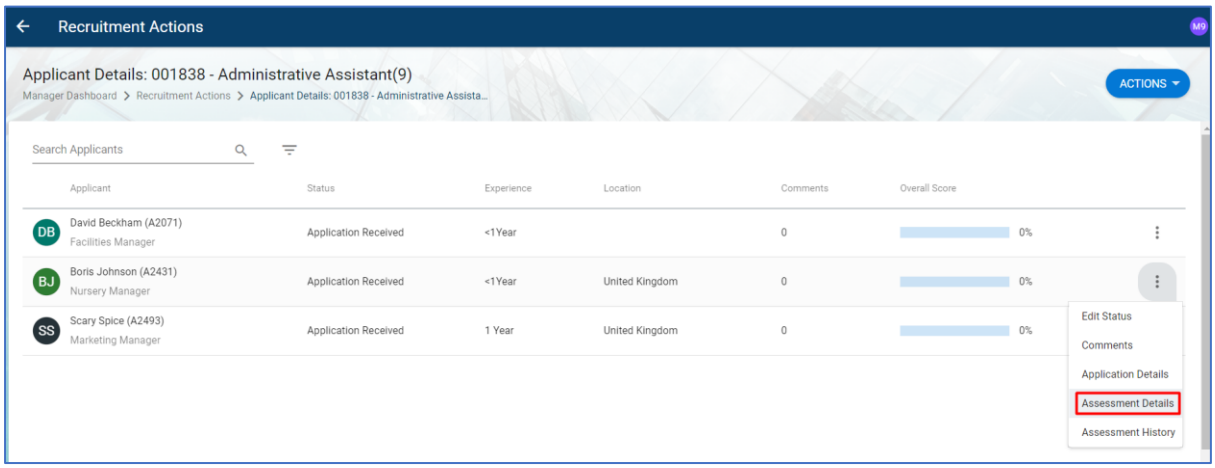
To access the Assessment Details section:
- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Interviews section, click 'View' next to the Vacancy Hub:



- Then click on the ⋮ button next to the relevant vacancy and select 'View Applicants'

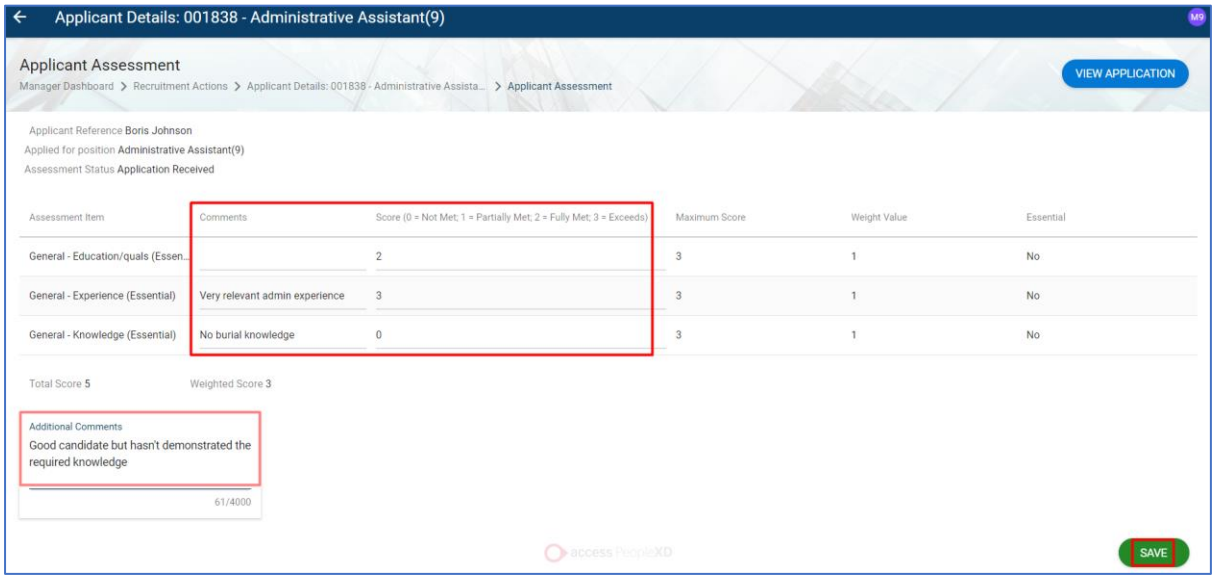


- You can complete the shortlist assessment by clicking on the ⋮ button next to each applicant's name and selecting 'Assessment Details'



- Input your score against each assessment criteria and, if applicable, provide comments/ justification and click 'Save'. Please note, the scoring scale is:
  0 = Not Met; 1 = Partially Met; 2 = Fully Met; 3 = Exceeds

- You can provide overall comments in the Additional Comments field, if applicable

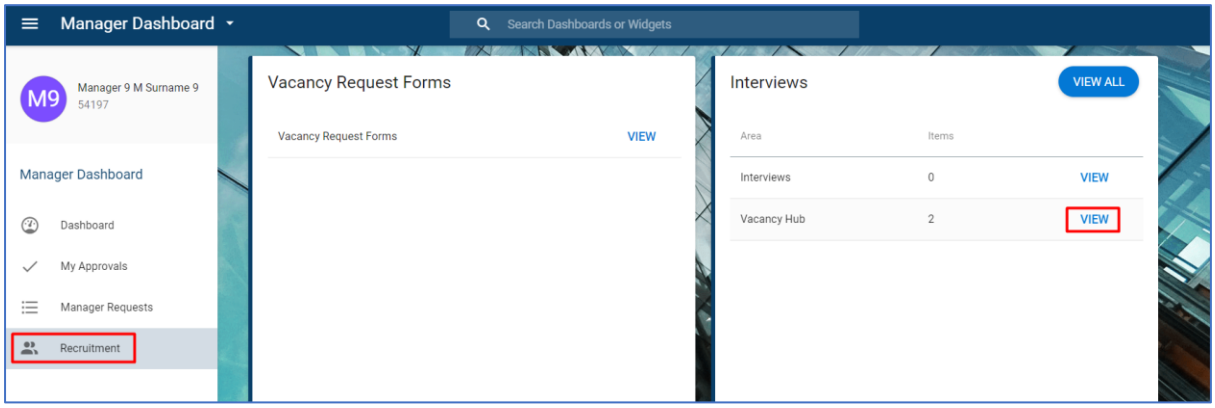


- Click back to return to any other applicants to continue shortlisting

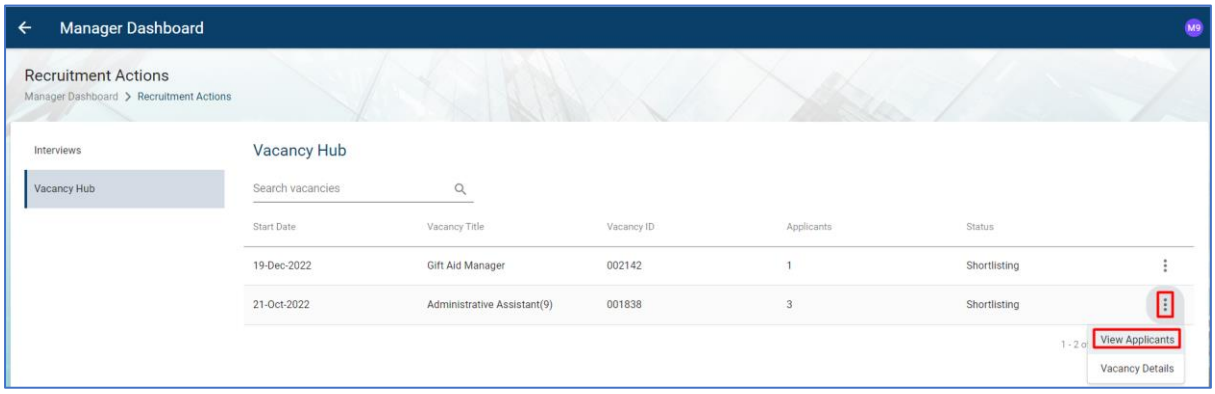
3.3. Progressing the applicant(s)

Once shortlisting is complete (as detailed above) the Hiring Manager should progress the applicants accordingly by updating their status. To update an applicant's status:

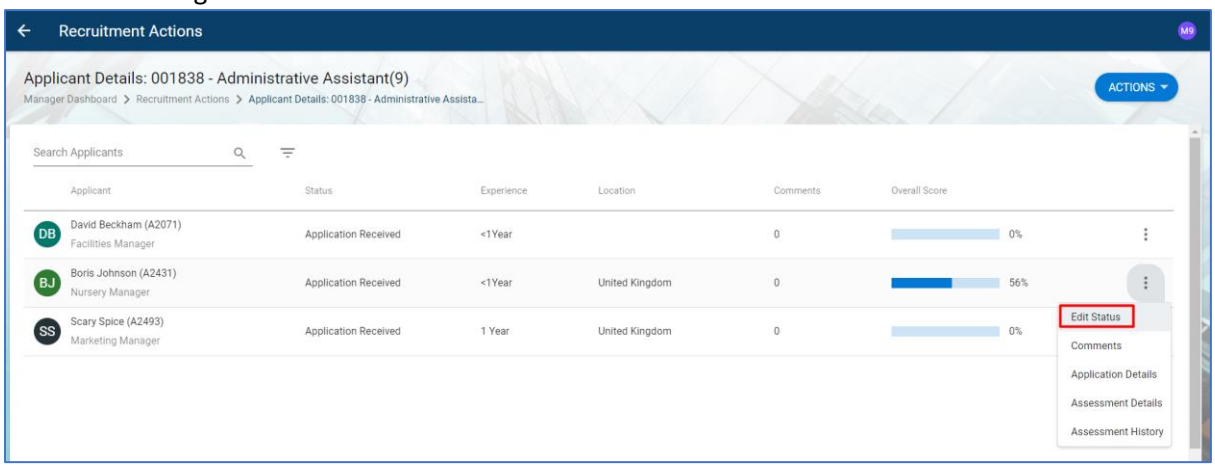
- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Interviews section, click 'View' next to the Vacancy Hub:



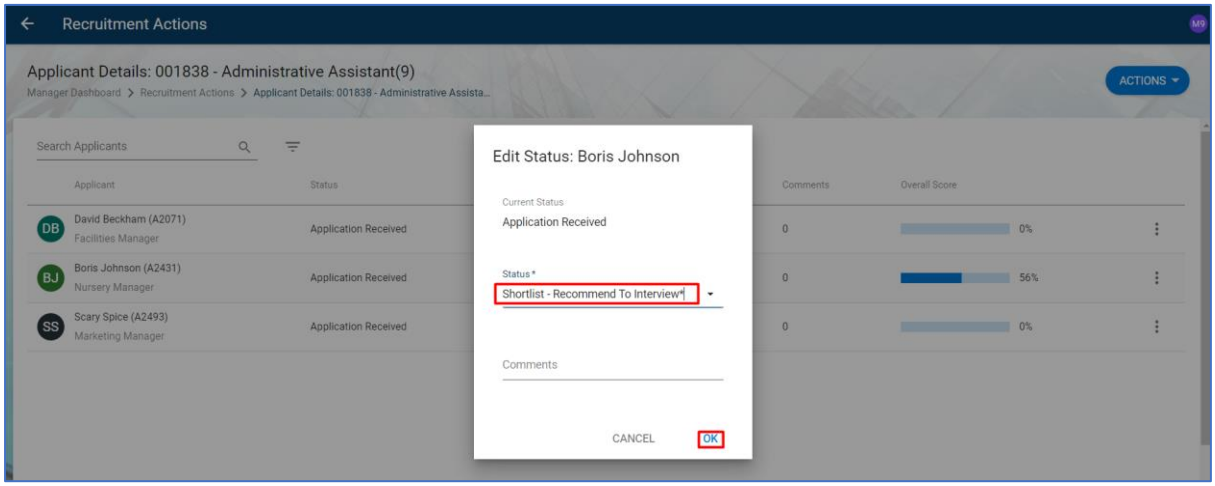
- Click on the ⋮ button next to the relevant vacancy and select 'View Applicants'



- Then update each applicant's status by clicking on the ⋮ button next to each applicant's name and selecting 'Edit Status':

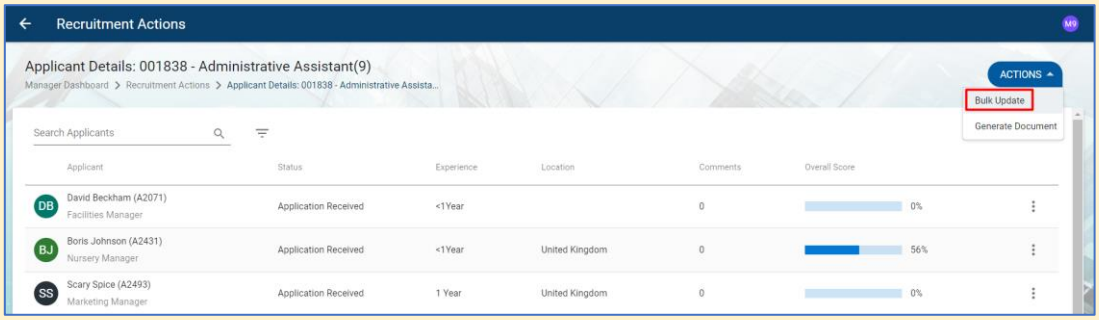


- Progress each applicant to one of the following status options and click OK:
  - Shortlist - Recommend To Reject
  - Shortlist - Recommend To Interview
  - Shortlist – Recommend to Reserve

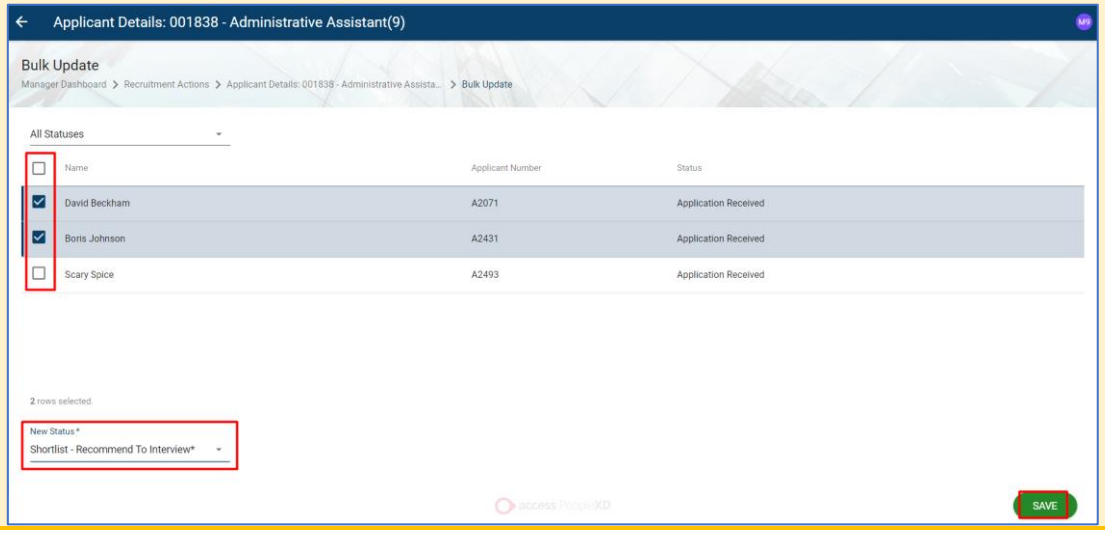


Note

It is possible to bulk update applicant statuses, by clicking on 'Actions' within 'View Applicants' and selecting 'Bulk Update':



Tick the relevant applicants, select the New Status from the drop-down list and click 'Save':



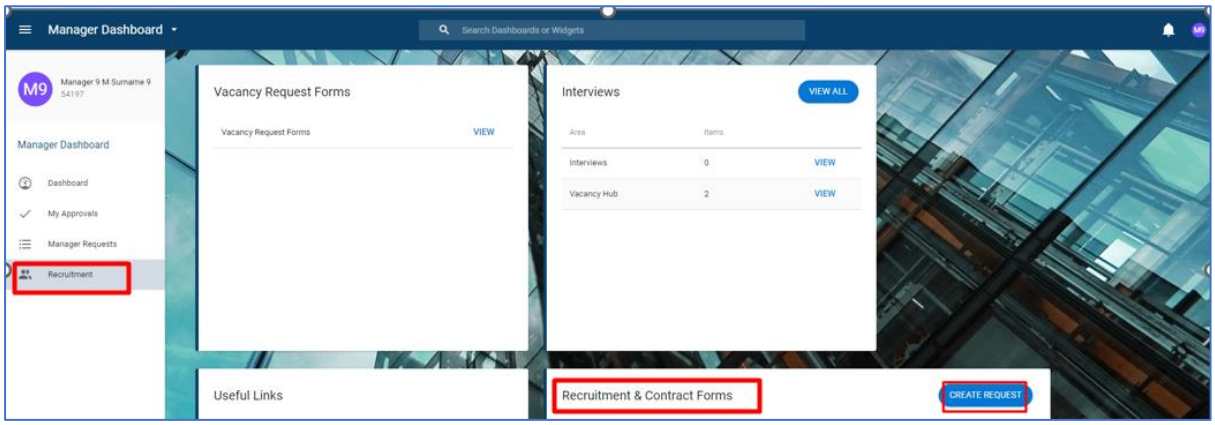
Following the status update, the HR team will be informed and action any rejections. Please see below for next steps for any applicants recommended to interview.

3.4. Provide interview details

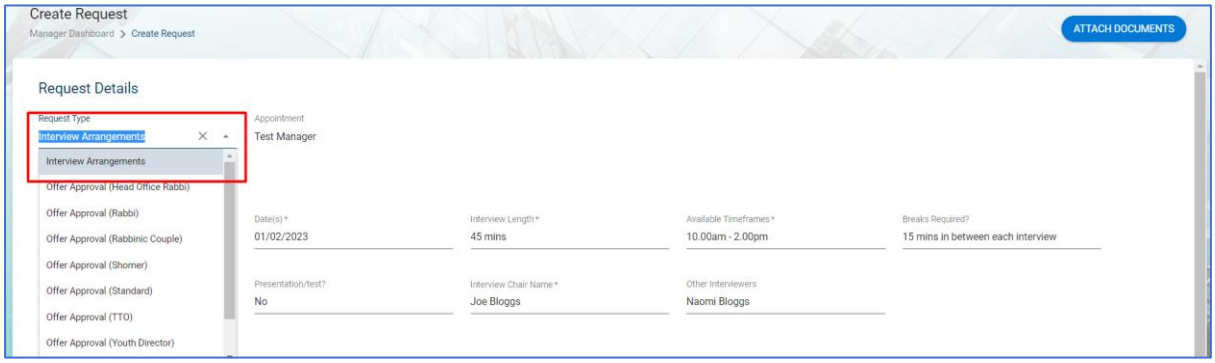
After progressing the applicant(s) to the 'Shortlist - Recommend to Interview' status, please complete the Interview Arrangements Form:

Note
If applicable, the Synagogue Administrator can raise forms on behalf of someone else, but the Hiring Manager will be bypassed in terms of approvals and notifications, and they will not be able to view the approved request.

- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Recruitment & Contract Forms section, click 'Create Request' (you may need to scroll down to view this section):

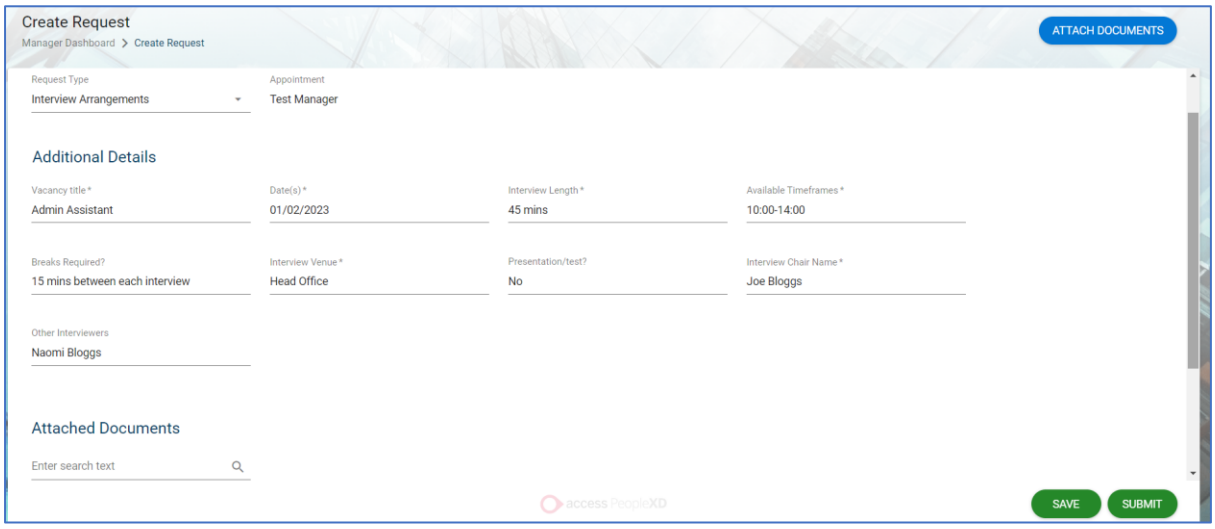


- Within the Request Type dropdown list, select 'Interview Arrangements':

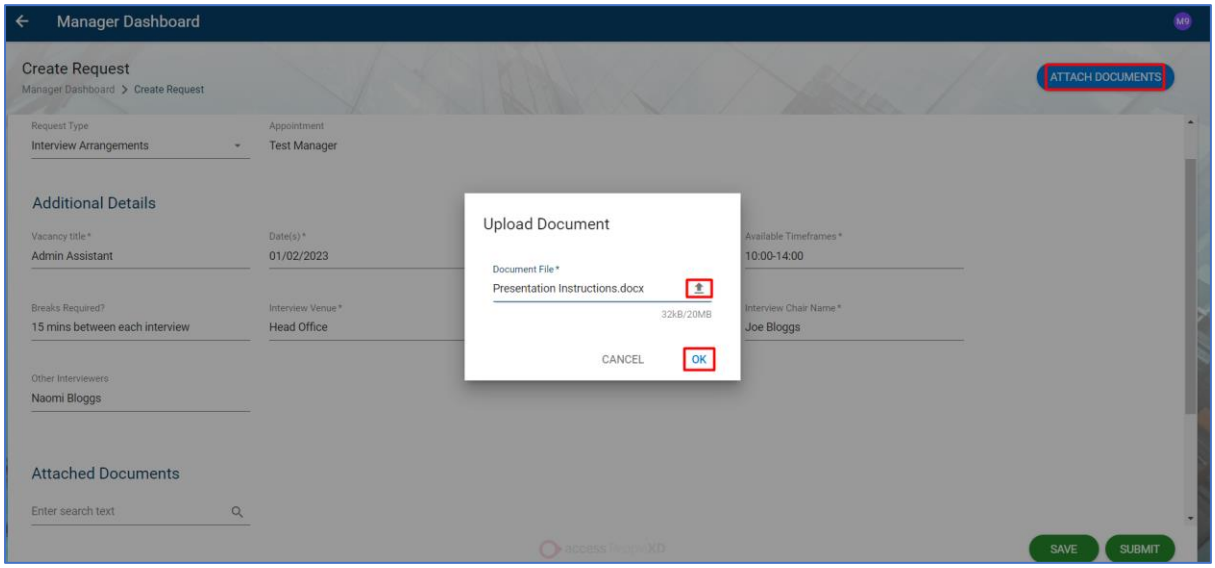


Note
The job title visible within the 'Appointment' field is your job title; if you have more than one appointment, ensure you are completing the form with the correct role/location selected.

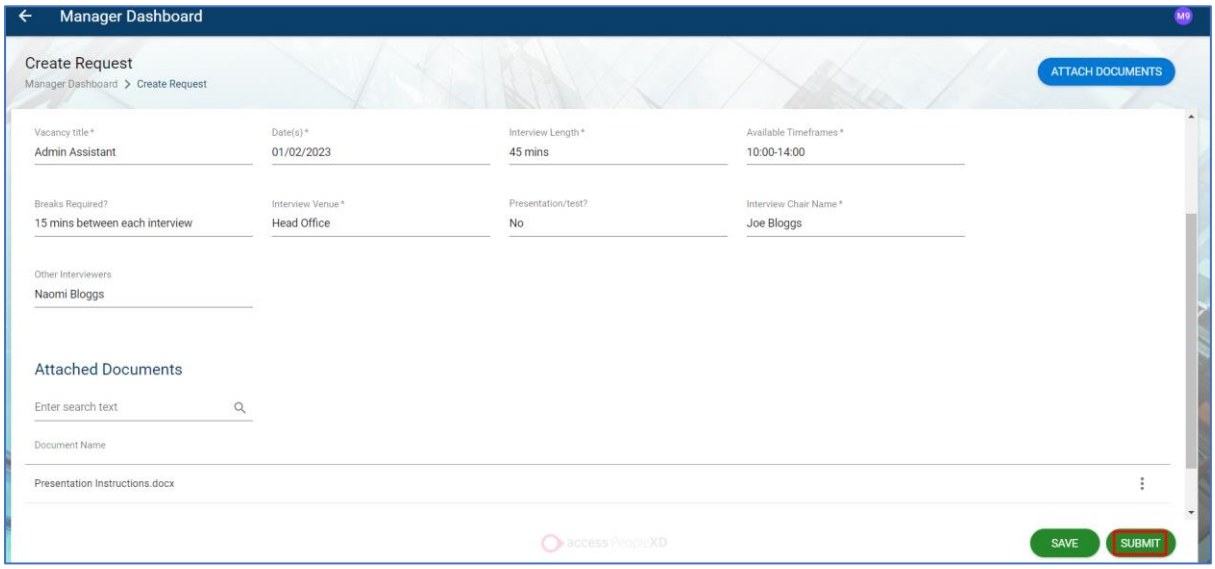
- Populate the fields:



- If a presentation or test is required, please upload any instructions/documentation to be provided to the applicants by clicking on 'Attach Documents' then upload the relevant documents and click 'OK':



- Click ‘Submit’ (or you can click ‘Save’ and return to the form at a later date):



- Once the form has been submitted, the information will be sent to the HR Department to arrange interviews. All panel members will be notified via email once the interviews have been scheduled and informed of next steps.

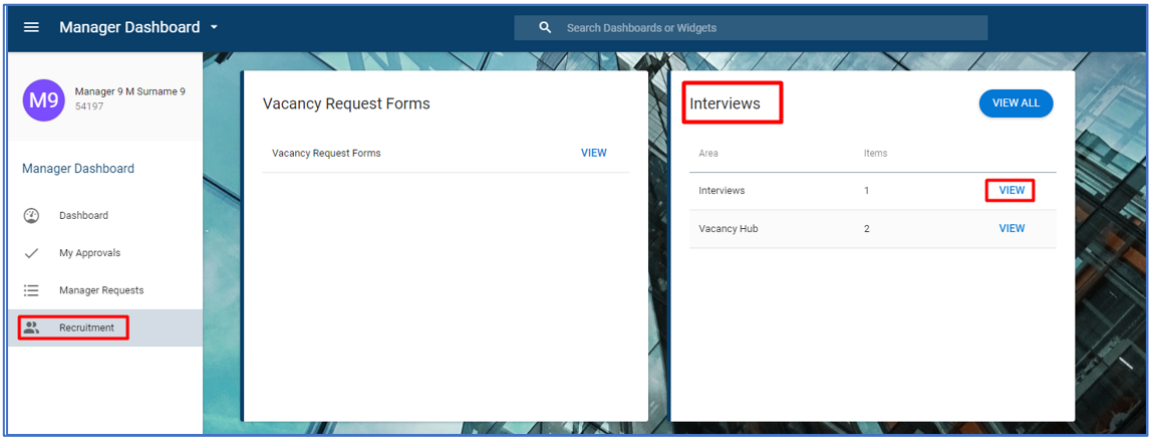
4. Conducting the interviews

All panel members will be notified via email once the interviews have been scheduled and informed of next steps.

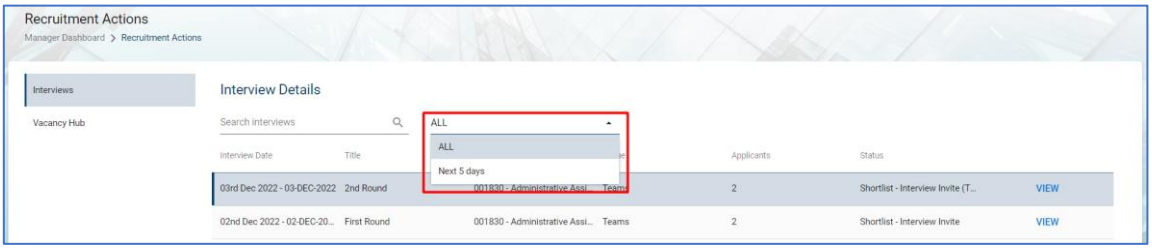
4.1. Viewing the interview schedule

To access the interview schedule:

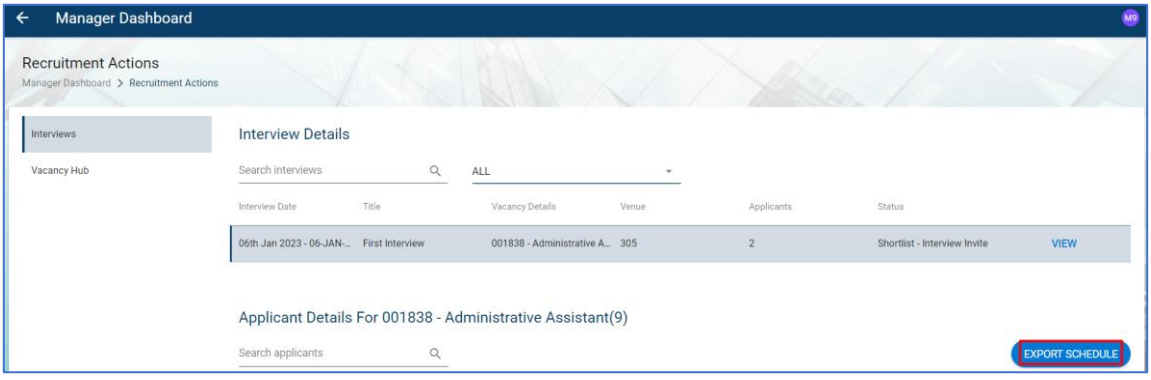
- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Interviews section, click 'View' next to Interviews:



- By default, within the Interview Details section, you will be able to see all interviews scheduled within the next 5 days. If you wish to see interviews scheduled beyond this point, change the dropdown from 'Next 5 days' to 'ALL':



- If you wish, you can export the Interview Schedule to Excel by clicking 'Export Schedule':



Note
You will be able to view the interview schedule whilst it is being arranged. You will receive an email once this is confirmed.

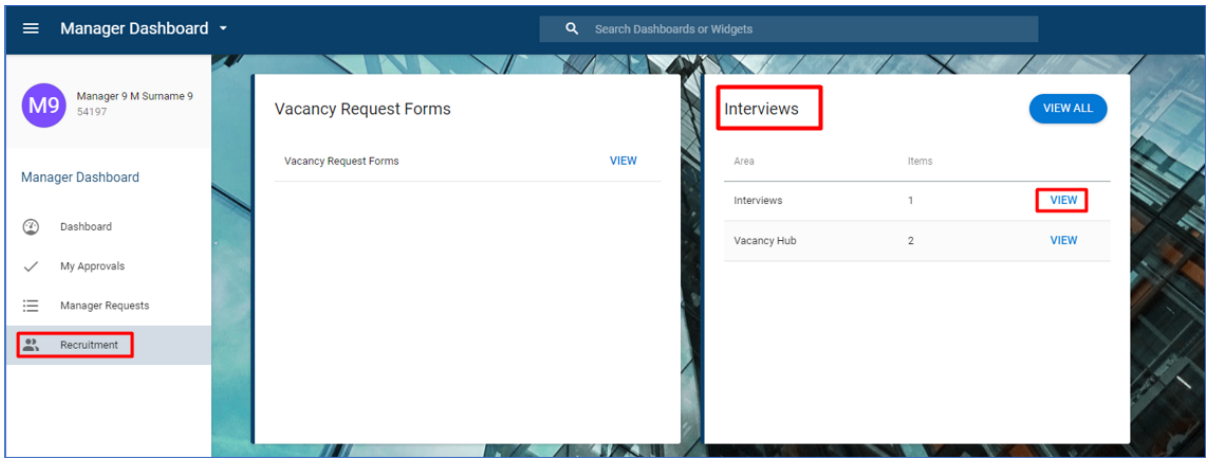
4.2. Uploading interview notes

During the interviews, all Interview Panel members should use the offline Interview Feedback form to capture their notes, which will be sent via email once the interviews have been scheduled.

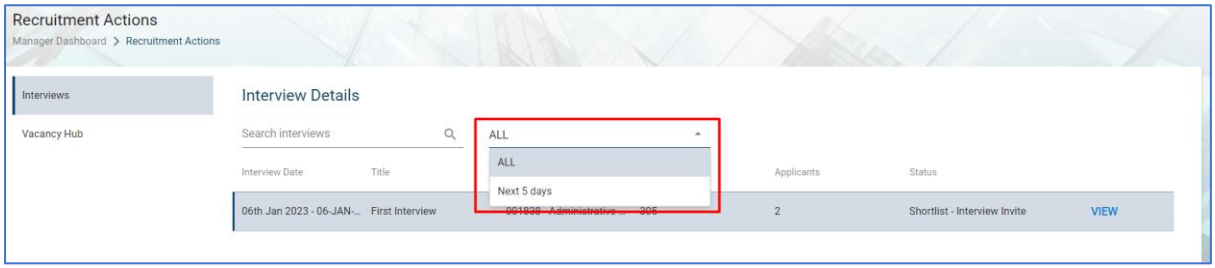
For safer recruitment roles: Please note, the applicant will be asked to complete and bring to the interview their completed self-disclosure form which should be reviewed by the panel during the interview.

Once the interviews have taken place, the interview notes should be provided to the Hiring Manager who should upload the notes (and, if applicable, copies of the self-disclosure forms) by following these steps:

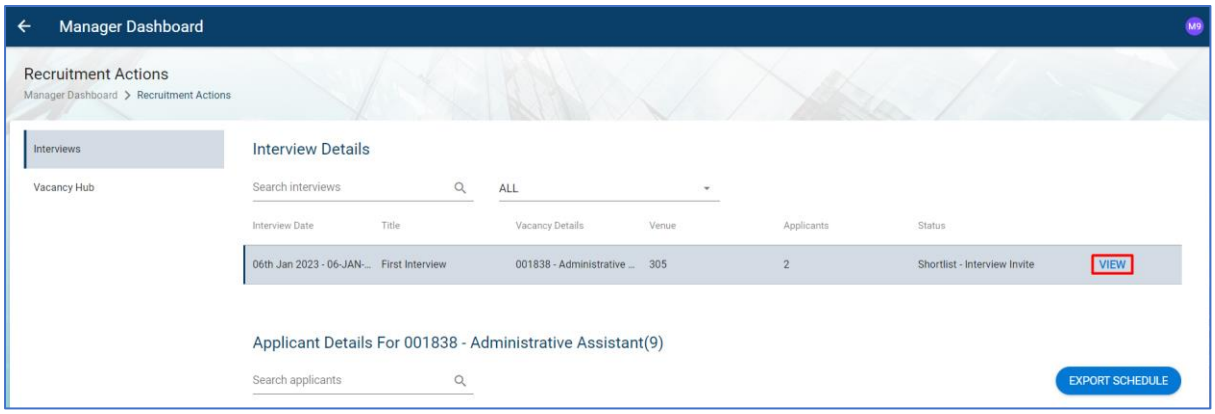
- Within the Manager Dashboard, navigate to the Recruitment tab
- Under the Interviews Section, click 'View' next to Interviews:



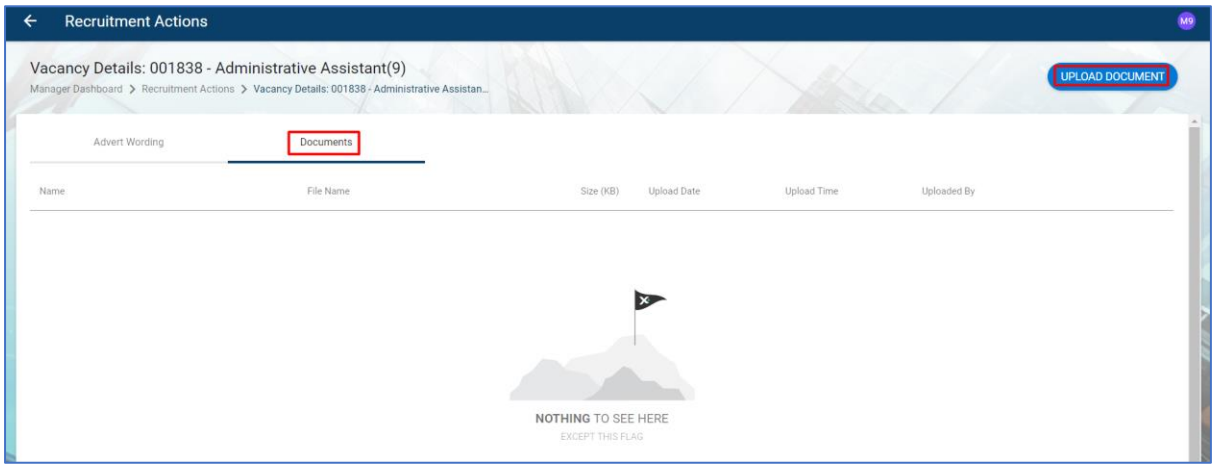
- By default, within the Interview Details section, you will be able to see all interviews scheduled within the next 5 days. If you wish to see interviews scheduled outside of this period, change the dropdown from 'Next 5 days' to 'ALL':



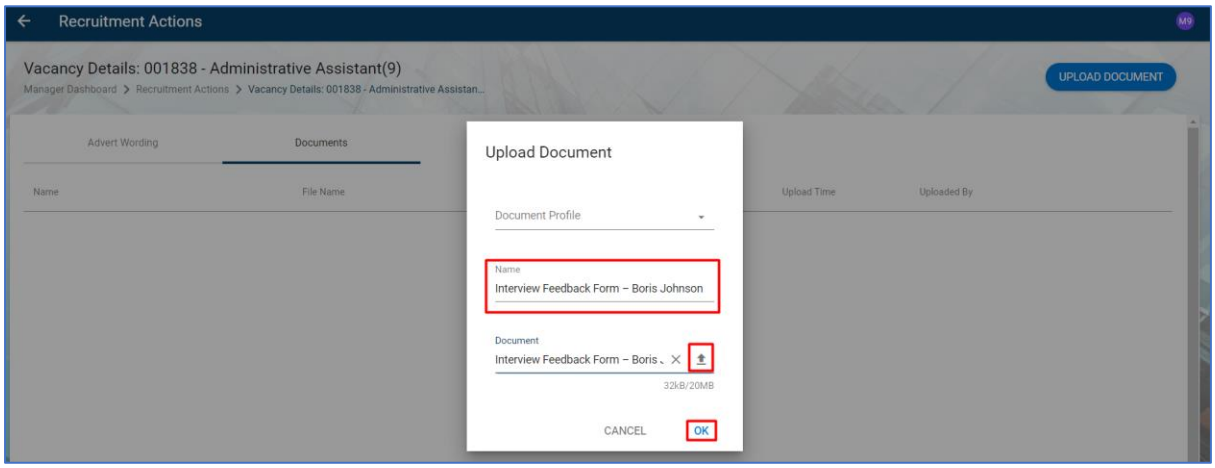
- Next to the relevant interview, click 'View':



- Navigate to the Documents tab and click ‘Upload Document’:



- Provide the applicant’s name within the file name e.g. “Interview Feedback Form – Boris Johnson”, upload the file and then click ‘OK’ (the ‘Document Profile’ should be left blank):

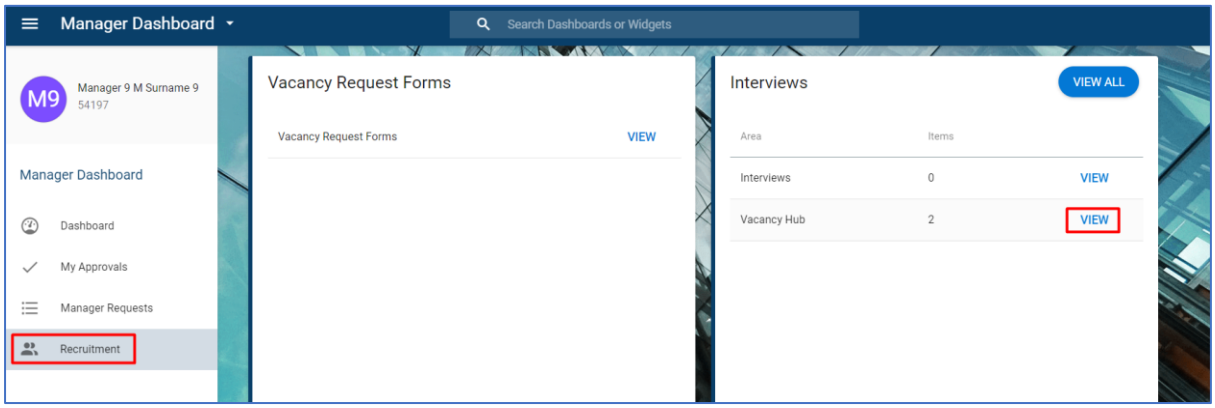


- Repeat these steps for each applicant.

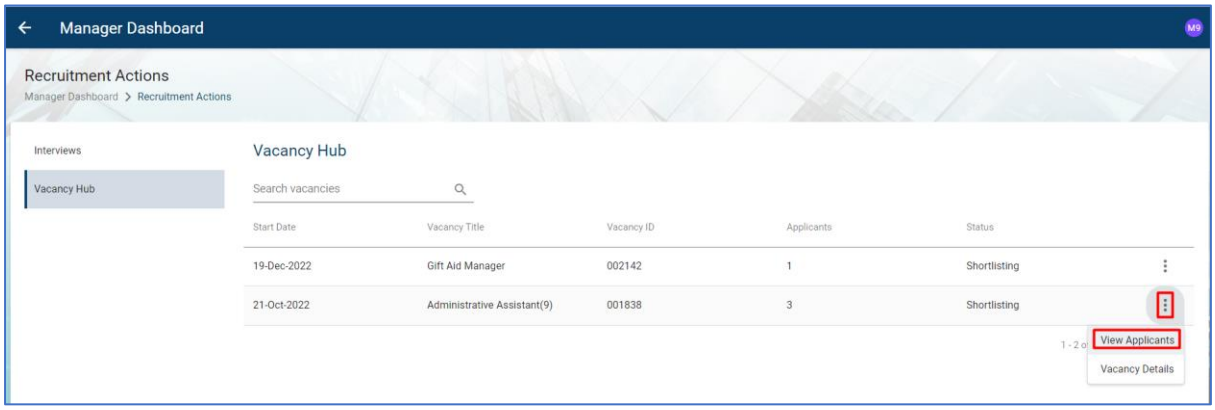
4.3. Progressing the applicant(s)

Once the interview notes have been uploaded, the Hiring Manager should update the status of each applicant. To update an applicant's status:

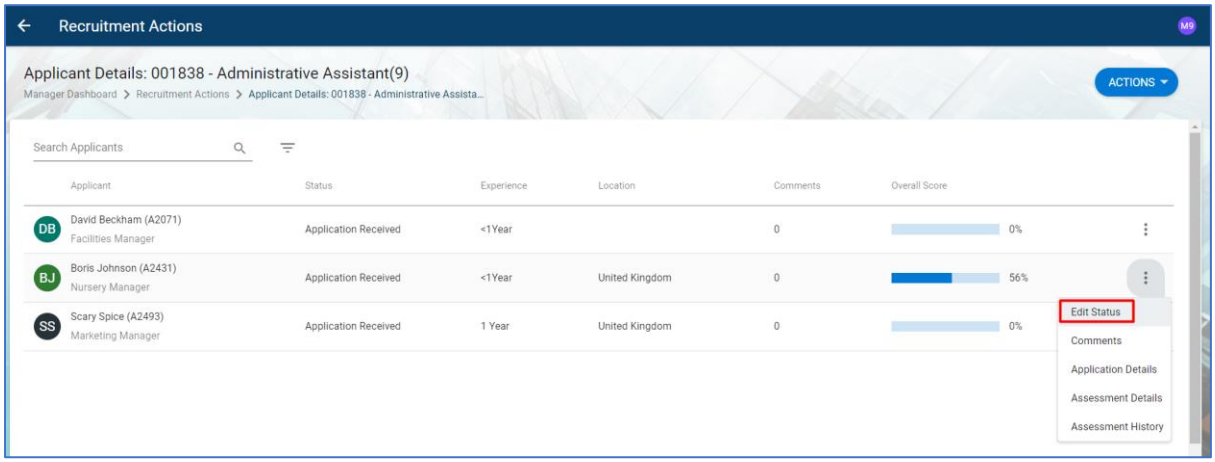
- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Interviews Section, click 'View' next to the Vacancy Hub:



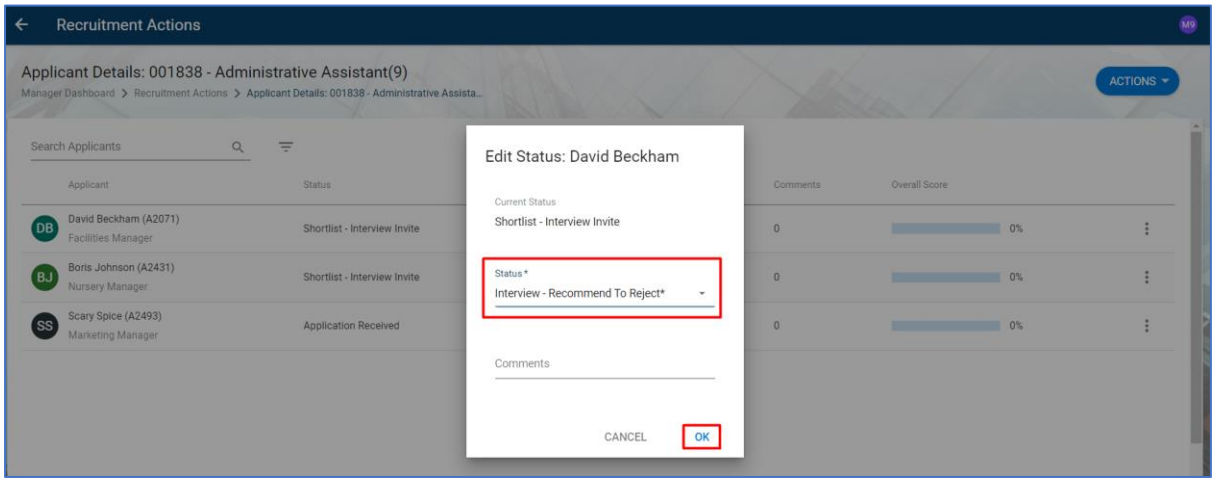
- Then click on the ⋮ button next to the relevant vacancy and select 'View Applicants'.



- Then update each applicant's status by clicking on the ⋮ button next to each applicant's name and selecting 'Edit Status':



- Progress each applicant to one of the following status options and click OK:
    - Interview - Recommend To Reject
    - Interview - Recommend To 2nd Interview
    - Interview - Recommend To Reserve
    - Interview - Recommend Progress To Offer



HR will be notified of the status update(s). For the successful applicant(s), the HRBP will be in touch to discuss and finalise the terms and conditions, prior to making the formal offer.

If you wish, you can contact the applicant to inform them that they have been successful, but you should ensure that you **do not discuss salary or start date**.

5. Actioning an offer

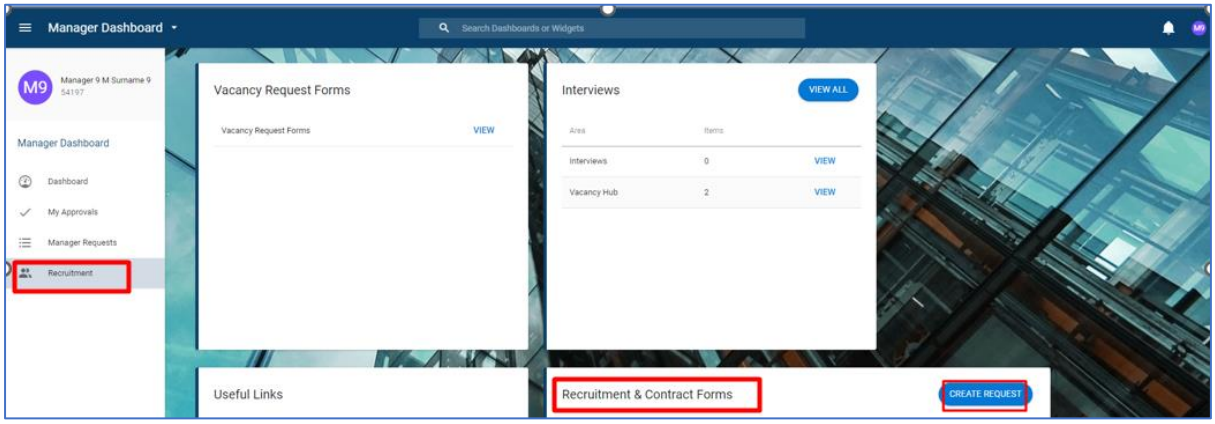
Your designated HRBP will be notified when you update an applicant's status to '*Recommend Progress To Offer'*. They will then contact you to finalise the terms and conditions for the offer. The HRBP will then verbally offer the role to the applicant and, once they have accepted, the HRBP will arrange a time with the Hiring Manager to complete the following steps:

5.1. Completing the Offer Approval form

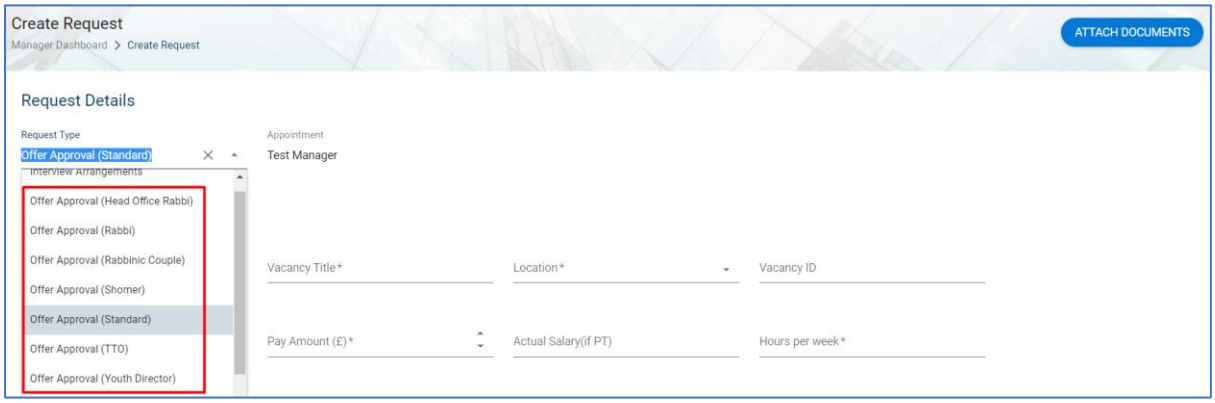
Once the applicant has accepted, the HRBP will arrange a time with you to complete the Offer Approval Form *(this replaces the Contract Request Form)*:

Note
If applicable, the Synagogue Administrator can raise forms on behalf of someone else, but the Hiring Manager will be bypassed in terms of approvals and notifications, and they will not be able to view the approved request.

- Within the Manager Dashboard, navigate to the Recruitment tab
- Then within the Recruitment & Contract Forms section, click 'Create Request' (you may need to scroll down to view this section):

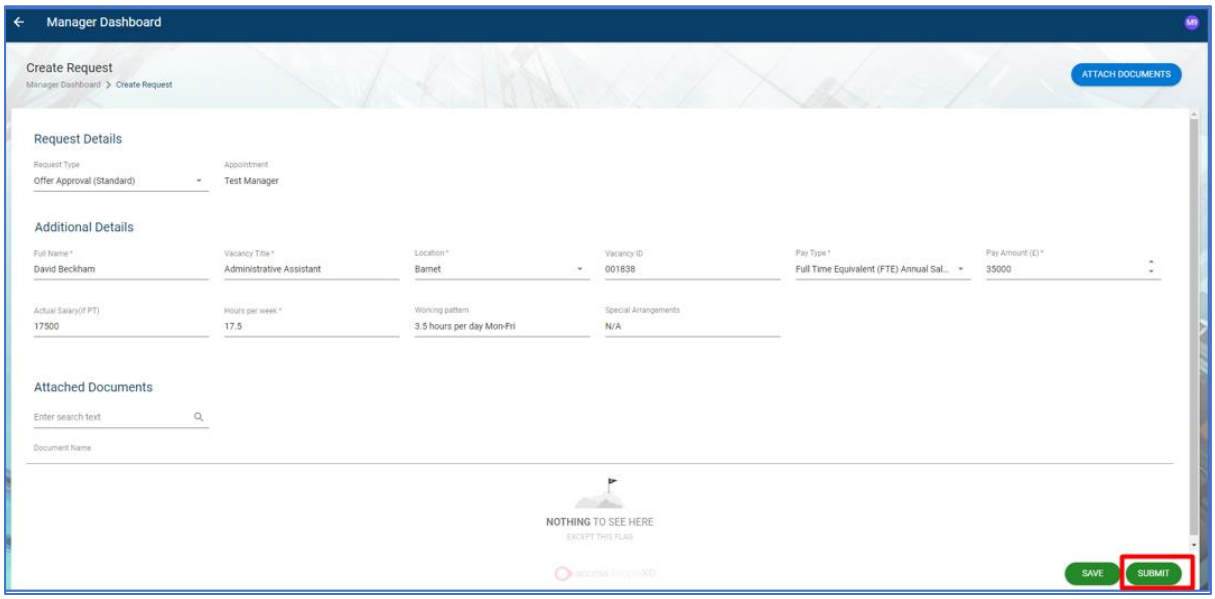


- Within the Request Type dropdown list, select the relevant 'Offer Approval' form:



Note
The job title visible within the 'Appointment' field is your job title; if you have more than one appointment, ensure you are completing the form with the correct role/location selected.

- Populate the fields and then click ‘Submit’ (or you can click ‘Save’ and return to the form at a later date):



- If you are submitting the form for an as-and-when/zero hours position, populate the Hours per week as ‘0’ and enter ‘N/A’ within the Working pattern field.
- Once submitted, the information will be sent to the HRBP for approval and the relevant parties will be notified (FR/Director, Finance, HR Admin).

Note

Please note, there is no requirement to attach either of following documents that were previously required:

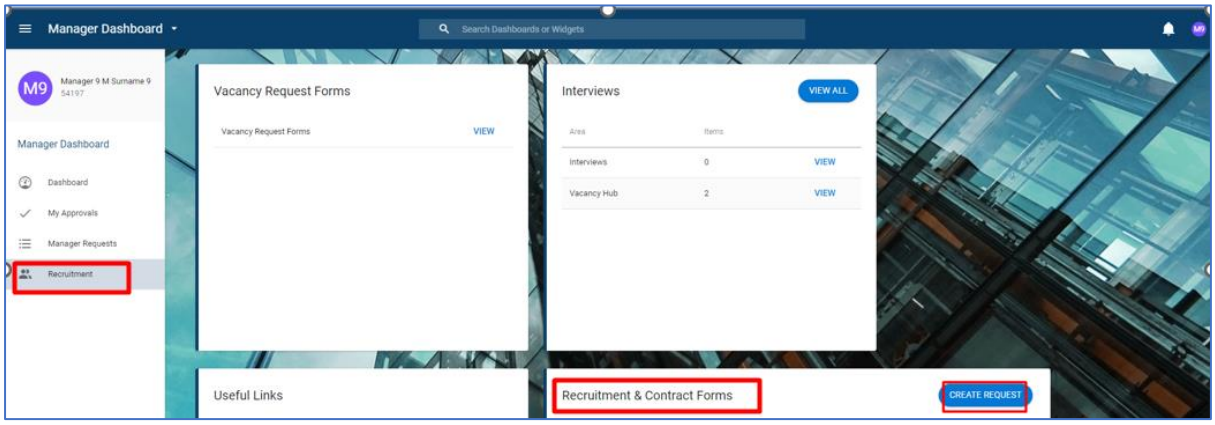
- Right to Work information will be captured separately
- The ‘New Starter Declaration Form’ (as new starters will be able to provide this information directly into Core within the Onboarding module).

The HR team will then issue the Contract of Employment, with **no start date** (as this will be subject to the successful completion of the pre-employment checks). The team will then commence the pre-employment checks and the Hiring Manager will be notified.

5.2. Completing the Right to Work Upload Form

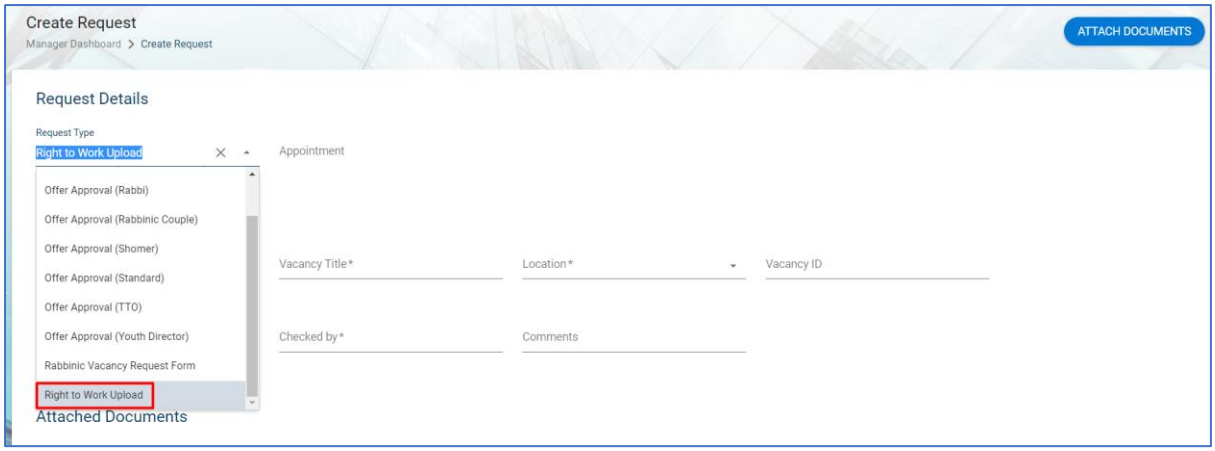
Once the pre-employment checks have commenced, the Hiring Manager will be notified via email and instructed to complete the Right to Work Upload Form by following these steps:

- As part of the pre-employment checks, the Hiring Manager is required to verify the applicant's Right to Work in the UK; therefore, the applicant will be asked to provide their evidence to the Hiring Manager (if they haven't already as part of the safer recruitment interview requirements, if applicable).
- Firstly, read and follow the "Right to Work Checking Process" document provided to you via email.
- Then complete the Right to Work Upload Form:
    - Within the Manager Dashboard, navigate to the Recruitment tab
    - Then within the Recruitment & Contract Forms section, click 'Create Request' (you may need to scroll down to view this section):



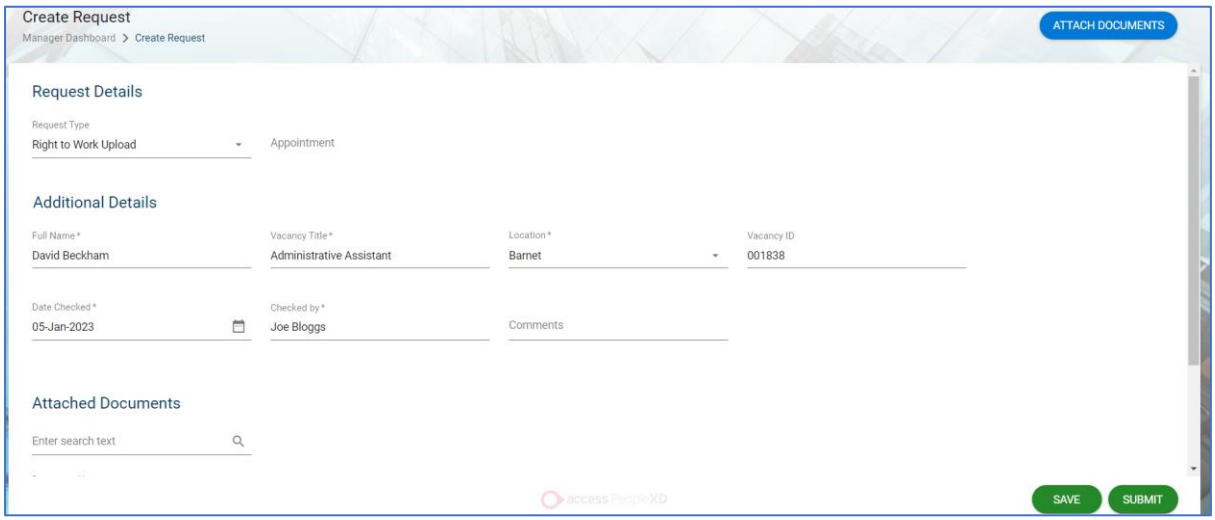
Note
If applicable, the Synagogue Administrator can raise forms on behalf of someone else, but the Hiring Manager will be bypassed in terms of approvals and notifications, and they will not be able to view the approved request.

- Within the Request Type dropdown list, select 'Right to Work Upload':

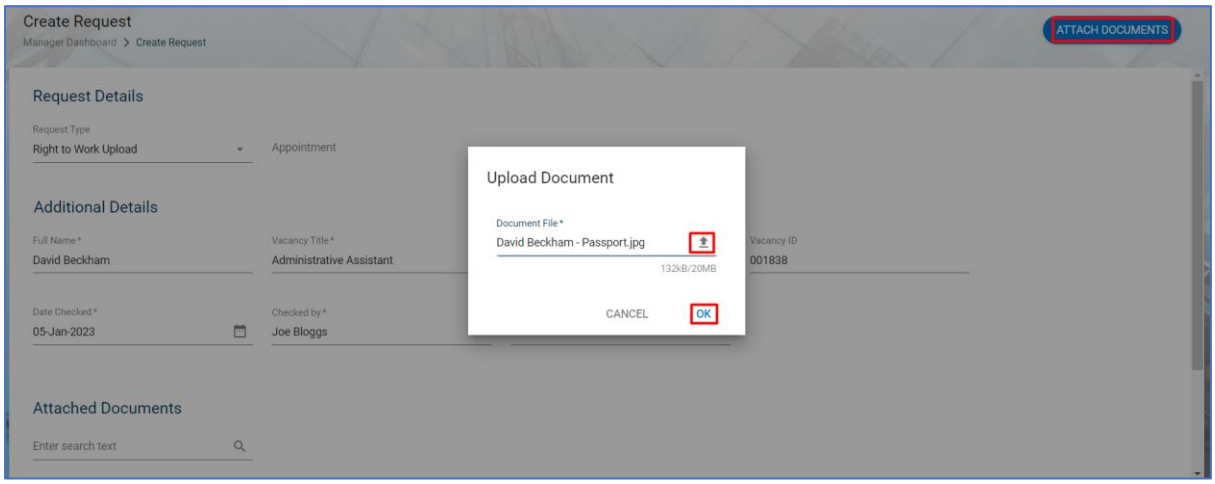


Note
The job title visible within the 'Appointment' field is your job title; if you have more than one appointment, ensure you are completing the form with the correct role/location selected.

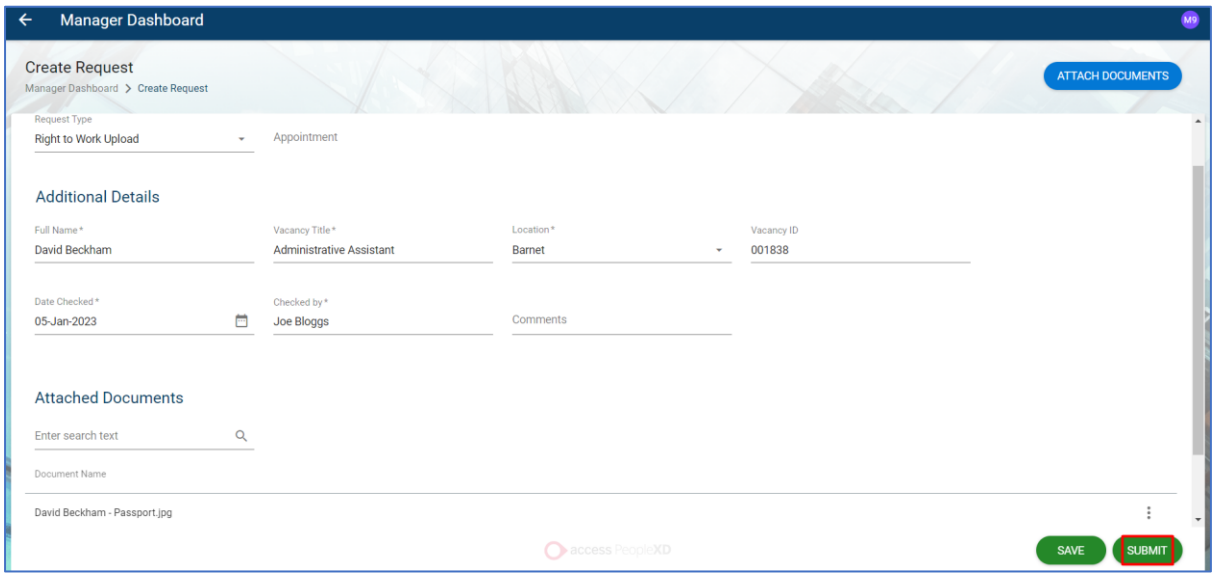
- Populate the fields:



- Attach the relevant documents by clicking on 'Attach Documents' then upload the file and click 'OK':



- Click ‘Submit’ (or you can click ‘Save’ and return to the form at a later date):

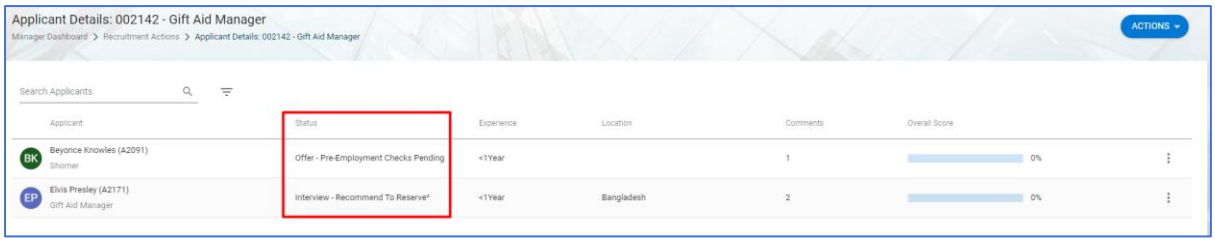


Note
Multiple Right to Work documents can be uploaded to the Right to Work Upload form, if required; each document will need to be attached individually by clicking Attach Documents.

Once the form has been submitted, the information will be sent to the HRBP for review and approval.

5.3. Tracking progress of pre-employment checks

It is possible to track the status of an applicant via their Applicant Status; this will demonstrate where they are within the Recruitment process, for example, e.g. 'Offer - Offer Accepted/Contract Signed', 'Offer - Pre-Employment Checks Pending', 'Offer - Pre-Employment Checks Completed':



Once all pre-employment checks have been satisfactorily completed, the HRBP will contact you to discuss/agree the start date. The HRBP will then inform the applicant and they will be transferred from applicant to employee, whereupon they will be required to complete their onboarding activities via CoreHR.