

# Hiring Applicants

## Hiring an Applicant in Self Service

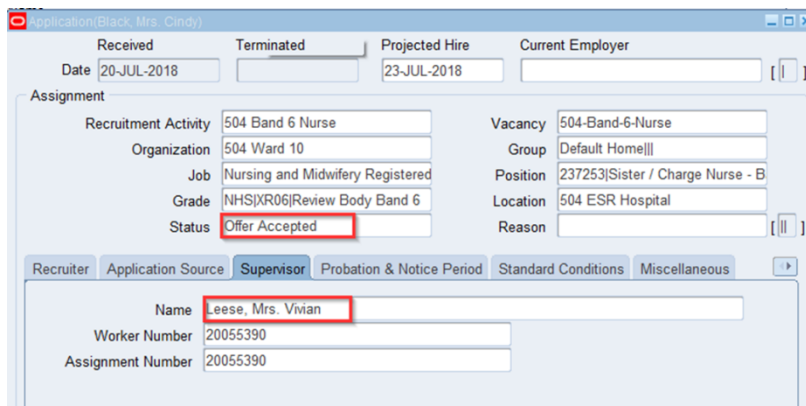
This Fact Sheet covers the tasks that need to be carried out when hiring an applicant using the Manager Self Service URPs. In addition to this it outlines tasks which will aid the hire process.

### Applicant Status and Manager

Before an applicant can be hired via the Self Service URPs certain conditions must apply.

As part of the recruitment process using the professional forms:

- The applicants status must be recorded as Offer Accepted.
- The Supervisor Tab on the applicant record must be completed. You will need to enter both the worker and assignment number.



Received	Terminated	Projected Hire	Current Employer
Date: 20-JUL-2018		23-JUL-2018	

Assignment

Recruitment Activity	504 Band 6 Nurse	Vacancy	504-Band-6-Nurse
Organization	504 Ward 10	Group	Default Home
Job	Nursing and Midwifery Registered	Position	237253 Sister / Charge Nurse - B
Grade	NHS XR06 Review Body Band 6	Location	504 ESR Hospital
Status	Offer Accepted	Reason	

Recruiter | Application Source | **Supervisor** | Probation & Notice Period | Standard Conditions | Miscellaneous

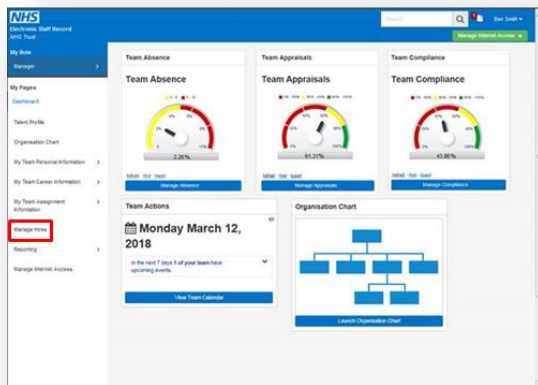
Name	Leese, Mrs. Vivian
Worker Number	20055390
Assignment Number	20055390

If this information is not populated the manager will be unable to hire the applicant.

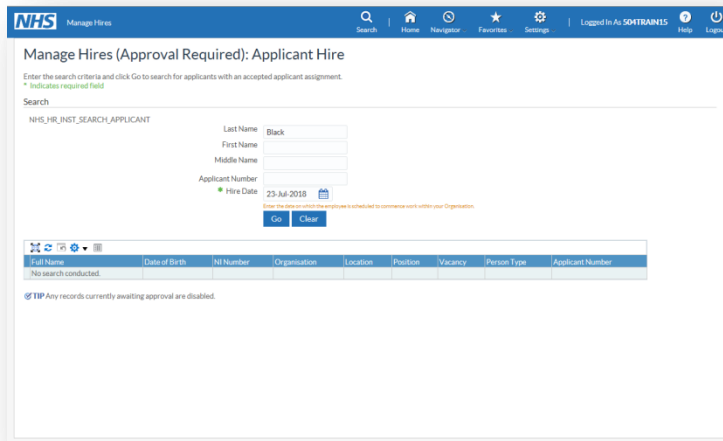
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## Access to Functionality



The functionality can be accessed by clicking Manage Hires link in the sidebar navigation pane on the Manager Dashboard on the ESR Portal.



# Hiring Applicants

## Search for Applicant

To search for an applicant enter the name and/or Applicant Number of the applicant in the appropriate fields in the Applicant Hire form and Click the Go button.

If there is more than one applicant with the same name select the applicant and click the Hire button. You will also need to ensure that the Hire Date is correct.

Manage Hires: Applicant Hire

Enter the search criteria and click Go to search for applicants with an accepted applicant assignment.  
\* Indicates required field

Search

NHS\_HR\_INST\_SEARCH\_APPLICANT

Last Name: Black

First Name:

Middle Name:

Applicant Number:

Hire Date: 24-Sep-2018

Go Clear

Select Applicant: Hire

Full Name	Date of Birth	NI Number	Organisation	Location	Position	Vacancy	Person Type	Applicant Number
Black, Mrs. Cindy	01-Jul-1982	NA010782B	504 Ward 10	504 ESR Hospital	237253(Sister / Charge Nurse - Band 6)NSA(Surgery)	504-Band-6-Nurse	Applicant	18804

TIP Any records currently awaiting approval are disabled.

## Internal Applicants

If an internal applicant is selected two options are presented:

Create Secondary Assignment – the application record becomes a new secondary assignment for the employee

Replace Primary Assignment – the application record replaces the existing primary assignment for the employee.

Select the assignment mode to hire internal applicant

For information on assignment modes, click [?](#)

Create Secondary Assignment

Replace Primary Assignment

Select Applicant: Hire

Select	Full Name	Date of Birth	NI Number	Organisation	Location	Position	Vacancy	Person Type	Applicant Number
<input checked="" type="radio"/>	Lawrence, Mrs. Mary	01-Jan-1960	WAS04185A	504 Ward 10	504 ESR Hospital	84710(Staff Nurse Band 5)NSA(Surgery)	504-Ward10IAT	Employee Applicant	18797

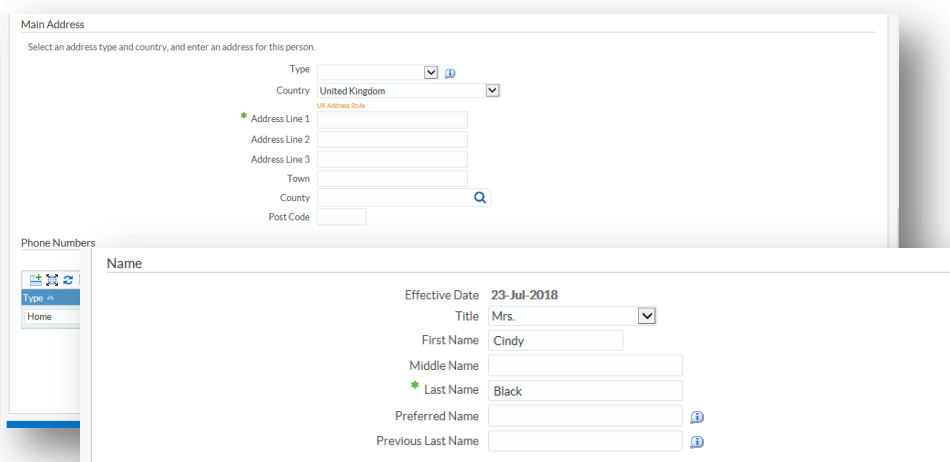
TIP Any records currently awaiting approval are disabled.

Where ESR is being used to manage establishment control local processes should be followed to ensure that establishment is not exceeded.

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## Personal Details

Some Personal Details will have been entered during the recruitment process. You will need to review this information to ensure that all necessary fields are complete.

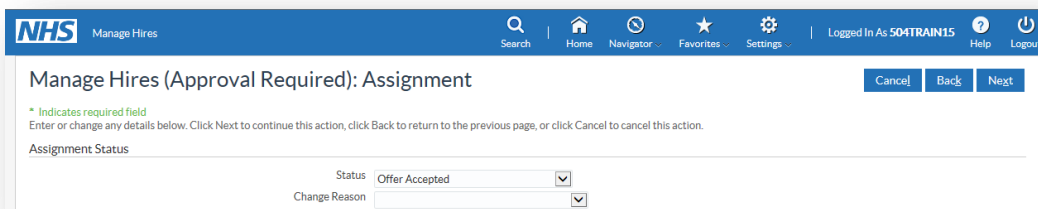


The screenshot shows two overlapping form windows. The top window is titled 'Main Address' and contains the following fields: Type (dropdown), Country (dropdown, set to 'United Kingdom'), Address Line 1 (text input, marked with a red asterisk), Address Line 2 (text input), Address Line 3 (text input), Town (text input), Country (dropdown with a search icon), and Post Code (text input). The bottom window is titled 'Name' and contains the following fields: Effective Date (text input, set to '23-Jul-2018'), Title (dropdown, set to 'Mrs.'), First Name (text input, set to 'Cindy'), Middle Name (text input), Last Name (text input, marked with a red asterisk, set to 'Black'), Preferred Name (text input with an information icon), and Previous Last Name (text input with an information icon). A 'Phone Numbers' sidebar is visible on the left of the 'Name' window.

## Assignment Status

The Status field will automatically be updated from Offer Accepted to Active Assignment on submission of the new hire request. This status will then be recorded against the employee's employment record in ESR.

A change reason should also be recorded.

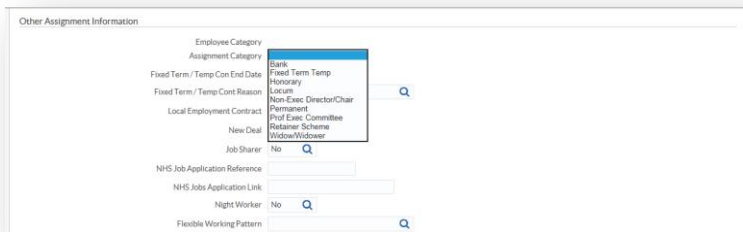


The screenshot shows the 'Manage Hires (Approval Required): Assignment' form. The top navigation bar includes the NHS logo, 'Manage Hires', and various utility icons (Search, Home, Navigator, Favorites, Settings, Logged In As 504TRAIN15, Help, Logout). The main content area has a title 'Manage Hires (Approval Required): Assignment' and three buttons: 'Cancel', 'Back', and 'Next'. Below the title is a note: '\* Indicates required field. Enter or change any details below. Click Next to continue this action, click Back to return to the previous page, or click Cancel to cancel this action.' The 'Assignment Status' section contains two dropdown menus: 'Status' (set to 'Offer Accepted') and 'Change Reason'.

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## Assignment Category



The correct Assignment category needs to be selected.

## Salary Information

The Salary Information should only be completed where a new employee will receive a spot salary, this would be instead of allocating a point on a scale.

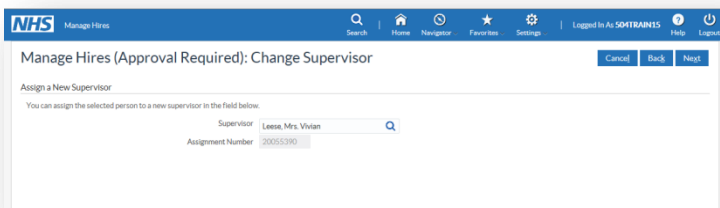


If the employee is to receive a spot salary it will need to be entered by your HR or payroll team.

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## Change Supervisor

If the person who is hiring the applicant will not be responsible for the day to day management of them they will be given the option to change the supervisor.



## Review Form

Details of any amendments made during the Hire Process are displayed highlighted by a blue dot.



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Attachments and comments to the approver can be added to support the Hire process, where further approvals are required.

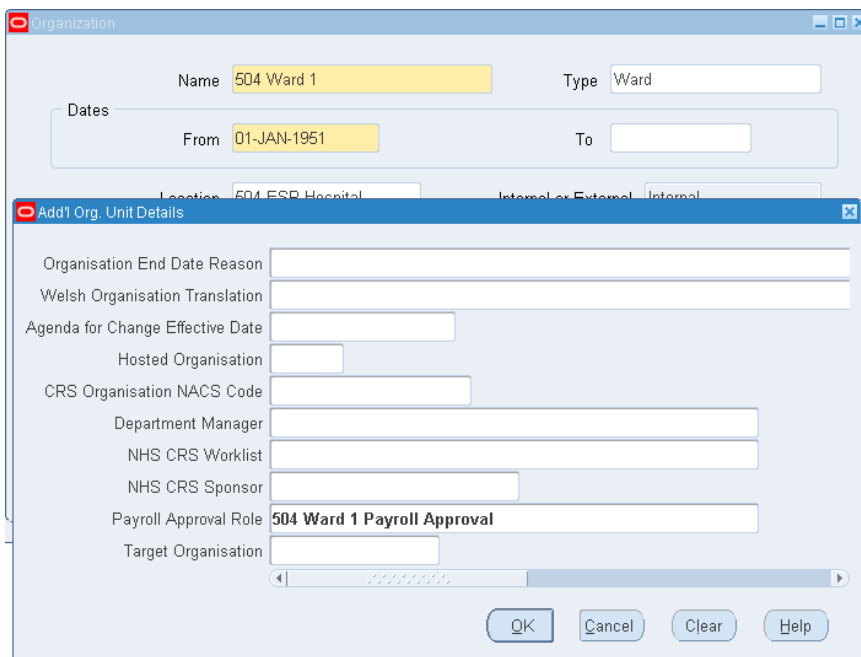
Review the information for the assignment and enter any additional comments to the approver. For example which point of the payscale the employee should be on.

## Local Payroll Approvals

Users of the Local Systems and User Administration URP can create local Payroll Approval roles to divide up the approval process within their organisation. The role names need to start with the organisation VPD code and have 'Payroll Approval' in the Role Name.

504 Car Park Termination	HR Manager		
504 Ward 1 Payroll Approval	HR Manager		<input checked="" type="checkbox"/>

A segment on the Organisation DFF called 'Payroll Approval Role' is used to associate all assignments linked to the organisation with the nominated payroll approval role. All organisations from this point down in the organisation hierarchy will also inherit this role unless another role is specified at a lower point in the hierarchy.



The screenshot shows two overlapping windows from a software application. The top window, titled 'Organization', has fields for 'Name' (504 Ward 1), 'Type' (Ward), and 'Dates' (From: 01-JAN-1951). The bottom window, titled 'Add'l Org. Unit Details', has several fields: 'Organisation End Date Reason', 'Welsh Organisation Translation', 'Agenda for Change Effective Date', 'Hosted Organisation', 'CRS Organisation NACS Code', 'Department Manager', 'NHS CRS Worklist', 'NHS CRS Sponsor', 'Payroll Approval Role' (504 Ward 1 Payroll Approval), and 'Target Organisation'. At the bottom of the second window are buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

For all Manager or Administrator Self Service changes that need Payroll Approval, the notification will go to users in the associated Payroll Approval role for that assignment. If the assignment does not have a role associated with it through the

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organisation structure then the notification will go to users in the national 'SSHR Payroll Notification' role.

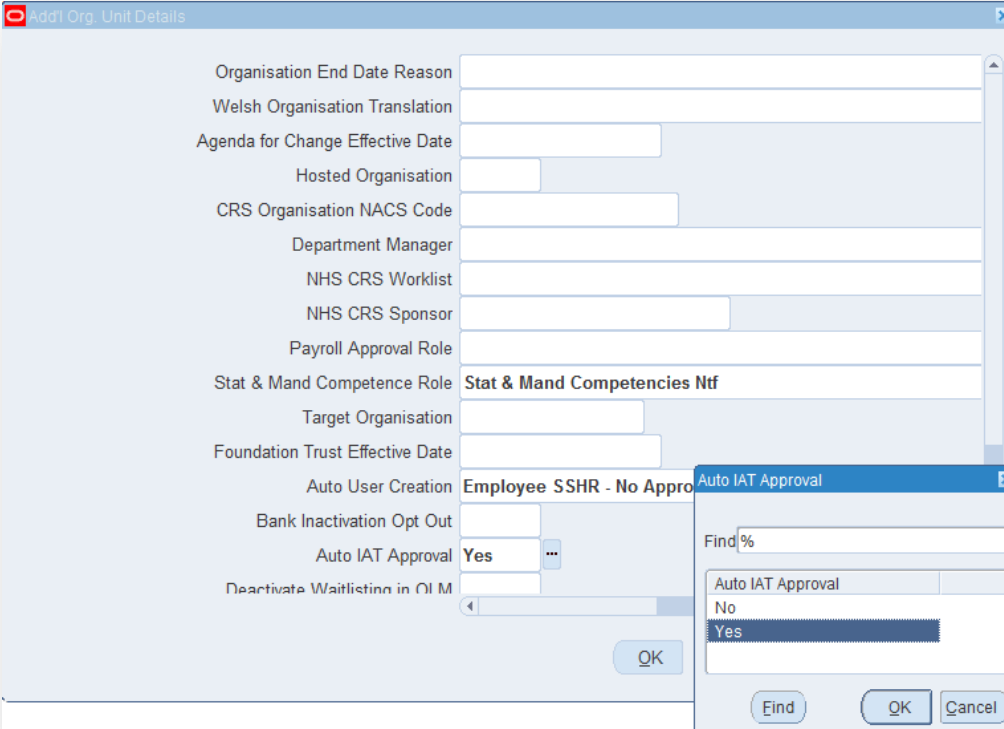
Where a notification is sent to a role that does not have a current active user attached, then the notification will fail. It is the system administrator's responsibility to ensure that all roles used for payroll approvals within the organisation have current active users attached to them.

If you are using the Manager Self Service (Payroll Approvals Not Required) URP your changes once submitted will be committed to the system.

## Additional Tasks

### IAT

The automated approval process enables both the initiation and approval to transfer the Portable Data Set. Auto IAT Approval needs to be recorded as Yes in the Add'l Org.Unit Details of the Trust level Organisation settings.



The screenshot shows a web-based form titled "Add'l Org. Unit Details". The form contains several fields for organizational information, including "Organisation End Date Reason", "Welsh Organisation Translation", "Agenda for Change Effective Date", "Hosted Organisation", "CRS Organisation NACS Code", "Department Manager", "NHS CRS Worklist", "NHS CRS Sponsor", "Payroll Approval Role", "Stat & Mand Competence Role" (set to "Stat & Mand Competencies Ntf"), "Target Organisation", "Foundation Trust Effective Date", "Auto User Creation" (set to "Employee SSHR - No Appro"), "Bank Inactivation Opt Out", "Auto IAT Approval" (set to "Yes"), and "Deactivate Waitlisting in OI M". A dropdown menu for "Auto IAT Approval" is open, showing a search bar "Find %" and a list of options: "Auto IAT Approval", "No", and "Yes". The "Yes" option is highlighted. Buttons for "OK", "Find", "OK", and "Cancel" are visible at the bottom of the form and the dropdown menu.



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This process is enabled where a 100% match has been found against:

- NI number
- Date of Birth, together with one of Last Name or Professional Registration

The Pre IAT dataset and the Portable Data Set information can be taken from the source NHS Organisation where they are subscribed to the Auto IAT process.

The IAT can be run for applicants with the status of:

- Offer Accepted
- Preferred Applicant
- Offered Post Unconditionally
- Offered Post Conditionally

## Pre IAT Datasets

Pre IAT datasets can be requested for:

- Occupational Health Information
- Statutory and Mandatory, CSTF, CCF and EDU competencies
- Doctors in Training and Trainee Dentists who have values in the Cash Floor Protection NHS and Annual Leave Appointment NHS elements

NHS Service History is only possible for organisations that have opted into the Auto IAT Process.

This information is transferred at the point of the Auto IAT approval and is returned to the appropriate Role Holders in the Organisation.

## IAT Reference Request

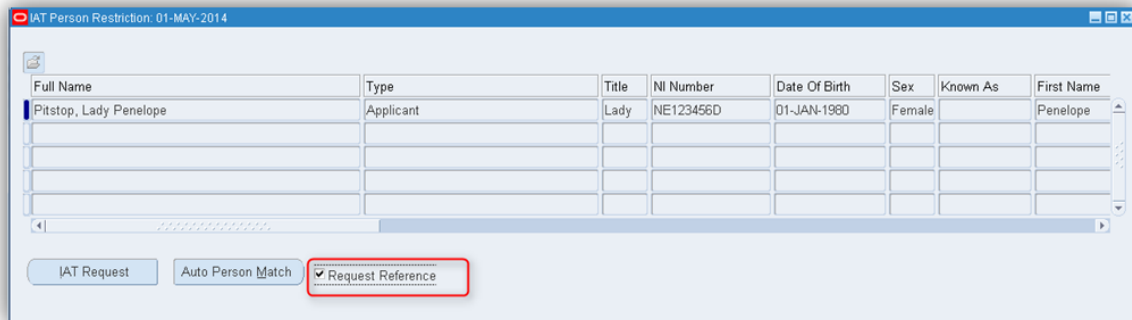
An optional tick box called 'Request Reference' is located on the IAT Person Restriction Form. Only available for applicants, ticking the Request Reference tick box will trigger a notification to the selected Organisation once the IAT is submitted and approved.

References can also be requested for internal applicants (Employee.Applicant and Ex-employee.Applicant)

Must have users in Reference Receipt and Reference Approver Roles to receive and request References

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The screenshot shows a software window titled "IAT Person Restriction: 01-MAY-2014". It contains a table with the following data:

Full Name	Type	Title	NI Number	Date Of Birth	Sex	Known As	First Name
Pitstop, Lady Penelope	Applicant	Lady	NE123456D	01-JAN-1980	Female		Penelope

Below the table are three buttons: "IAT Request", "Auto Person Match", and "Request Reference". The "Request Reference" button is highlighted with a red box and has a checked checkbox next to it.

The reference can be requested as part of the Pre Hire IAT process.

## Applicant Housekeeping

Applicants with a status of Ex-Applicant, where the records have had no activity for 13 months or more are automatically purged from ESR. Unsuccessful applicants' status should be updated to Ex-Applicant to ensure that they are included in this process.

To help with identifying the applicant records requiring a status update the analyses on the Vacancy tab of the Recruitment Dashboard can be configured to highlight applicants with a given status for X number of days e.g. those with a status of anything other than successful for more than 28 days may require updating to Ex-Applicant. Further details can be found in the ESR BI Dashboard Guide.

If applicants remain on ESR unnecessarily it can result in slower loading times and lead to difficulty in selecting the correct applicant record.