iTrent Recruitment – Manager's Guide

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Managers Guide – iTrent Recruitment

As a manager you will now request an advert (requisition) and manage the recruitment process via myTeam (iTrent), keeping the process streamlined within the one system.

This document will provide guidance on how to request a requisition, how to manage shortlisting, interviews and offer the successful applicant a position within the organisation.

Logging in

Log in to myTeam and select “Recruitment” from your main menu options:

1. You will now be directed to your Recruitment Summary dashboard:

Within your dashboard, there is an “Alerts” section which shows information such as:

- Total Requisitions
- Total Requisitions which have been published
- Number of interviews in the next 7 days
- Total number of applicants
- Average days to fill position
- Open positions

The “Open Requisition” section will display your requisitions and provides a quick overview such as:

- Requisition name
- Number of applicants
- Status of requisition (published or not)

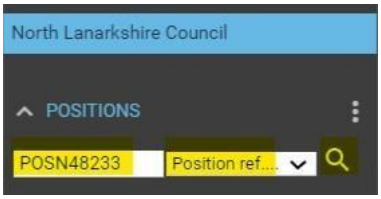
At the bottom of the summary page, you will have access to useful links that will assist you when navigating within the system. It contains helpful folders with steps under each folder which have been set up to ease your user experience.

Request to Recruit

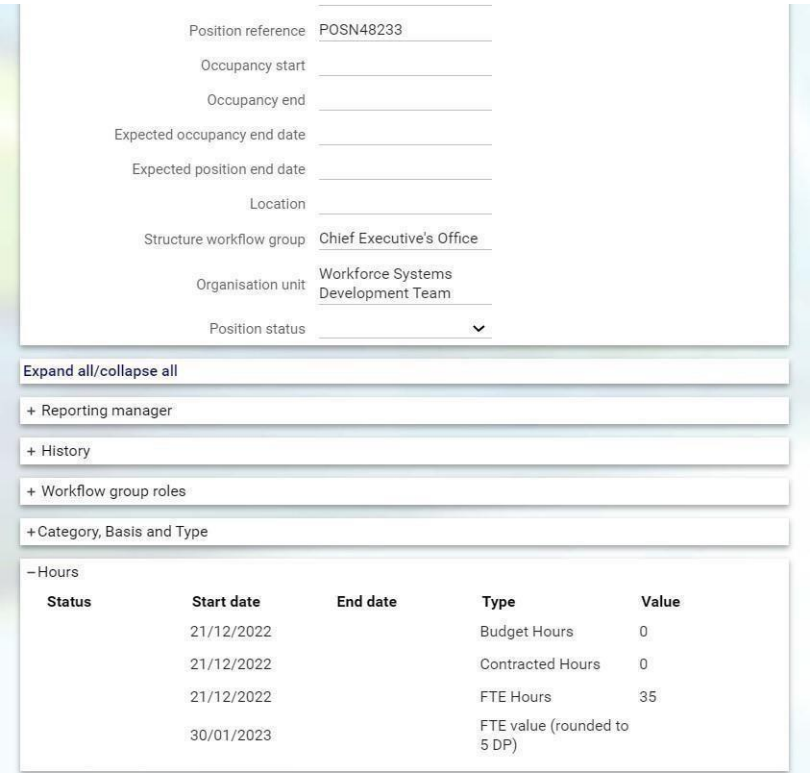
To request to recruit, the first stage in the process is to review the current position details. You must be the reporting manager of the position(s) otherwise you will not be able to view the information. Therefore, if one of your reportees or colleagues is the reporting manager for the position(s), you should advise them to complete this section to confirm the vacant position(s) details are correct. You are required to have this information before you can progress to Step 3 “Request to Recruit”.

Select “1. Review current position details” as shown below:

When this link is selected, a search bar will appear on the left-hand side of the page. Within the “Search” section, enter the position number, ensure that the drop down is selected to “Position ref. no.” and then search by clicking the magnifying glass:



Once you have entered the position number and clicked the magnifying glass to search - the “Position Summary” screen will display. You will now be able to review the current position details such as contracted hours and grade:



When you have reviewed the position details, the next step is to check that the position is vacant. The structure will only allow one occupant per position at any one time.

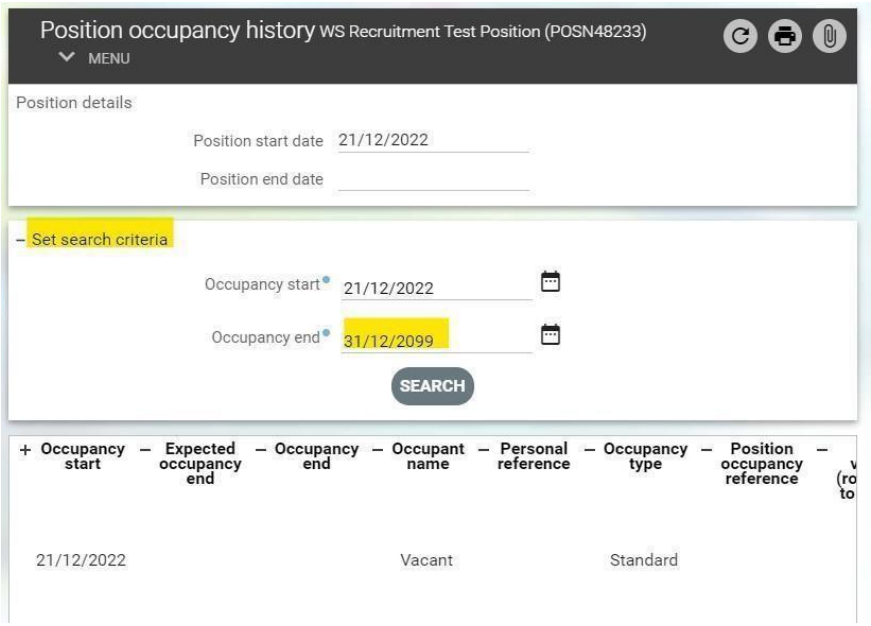
***Please note: If when reviewing you notice details that are incorrect, for example,* the wrong contracted hours within the position, you should not proceed. Contact your HR Business Partnership Team to gain clarity before progressing.**

Select “2. Review Position Occupancy history” from the menu bar:

This will display the history of the position occupancy. For this example, the position has been vacant from its creation. However, if an employee has been, or is currently in the position, their details will display below. To use a position to recruit, any employees’ name who appears, must have an end date in the “occupancy end” field. If there is an employee within the position but no “occupancy end” is shown, you will be unable to use

this position. Your HR Business Partner will be able to advise on how to progress with your position numbers if they are occupied.

To ensure you view any future dated changes, please click the highlighted “Set search criteria below” and search for a date in the future such as 31/12/2099. This will ensure that any future dated changes are displayed.



You should then repeat this step for each position number you have to ensure they are either vacant or have an occupancy end date. Once your position number(s) have been confirmed as vacant (or soon to be vacant), you should progress to the next link on the menu “3. Request to Recruit.”

Within the “Requisition details” page; under the “Requisition” heading, you should complete the following fields:

Requisition name – this should be the name of the position you are recruiting for. If you also intend to use this requisition to recruit for casual/sessional vacancies, please indicate this in the requisition name. For school recruitment you should also include the name of school in this field.
The **Requisition reference** will generate automatically once the request has been submitted.

Start date – This should always be completed as the current date, even if you intend for the successful applicant to start in the distant future.

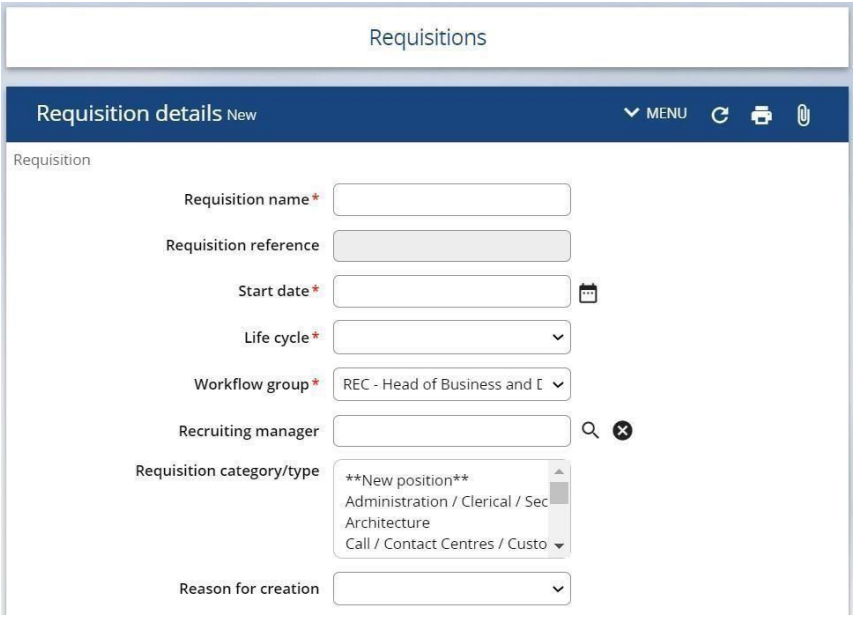
Life cycle – Select from the drop-down whether this is a Teaching or Non-Teaching requisition.

Workflow group – Select the relevant workflow group for your service/department. This is to ensure that your request goes via the correct authorisation process for your service. **Selecting the incorrect option here may direct this to the wrong authorizer and therefore delay your recruitment request, so please ensure this is correct.**

Recruiting Manager – After selecting the magnifying glass icon you should update the drop-down search to “Personal reference” and enter your employee number. You should then select your employee record from the results.

Requisition category/type – Select the most appropriate category for the position you are advertising. This will ensure your advert appears in the search results for applicants who filter their search by this field.

Reason for creation – From the drop-down list, select the reason for requesting the requisition.



At the **Additional fields** section you should then complete all fields relevant to your request to recruit. If any of the required information is not completed, your request to recruit will be rejected and you will have to resubmit this again.

Please also ensure you include details of the Panel Members for your requisition at the relevant field, as they will need to be attached by the Workforce Resourcing team in order to access applications and progress applicants through the recruitment process.

Once you have entered all information applicable to your request, you should select **Save**. The request to recruit will then be sent through the authorisation process. You will receive email notifications to advise which authorisation stage your requisition is at, as well as whether the request has been authorised or rejected.

Please ensure that you only press the save button **once.** Once you have saved, please do not make any changes as this will cause the requisition to cancel and not progress. If you require to make any changes, you should follow the re-submission guidance.

Once the requisition has been fully approved, the Workforce Resourcing Team within the Employee Service Centre will then progress to advert.

The parties involved in each stage of the authorisation process are the HRBP Admin, Finance and HR Business Partner.

Once the requisition has been progressed to advert and published, applicants will then be able to view this and apply. iTrent Recruitment allows you to view real time information, so once an applicant applies, you will be able to view their application.

Applicants are however anonymous on iTrent Recruitment. Managers, Panel Members and the Workforce Resourcing Team will not be able to view any identifiable information at the first stage of the process. Applicants will be furnished with an “Applicant Reference Number” (APP********) and any identifiable information (such as their name) will only be made available if the applicant is successful in being progressed to interview.

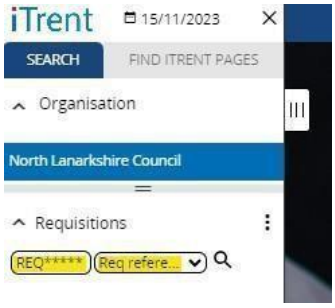
Requisition Request Rejected

If your request to recruit is rejected, you will receive an email advising the stage this has been rejected at.

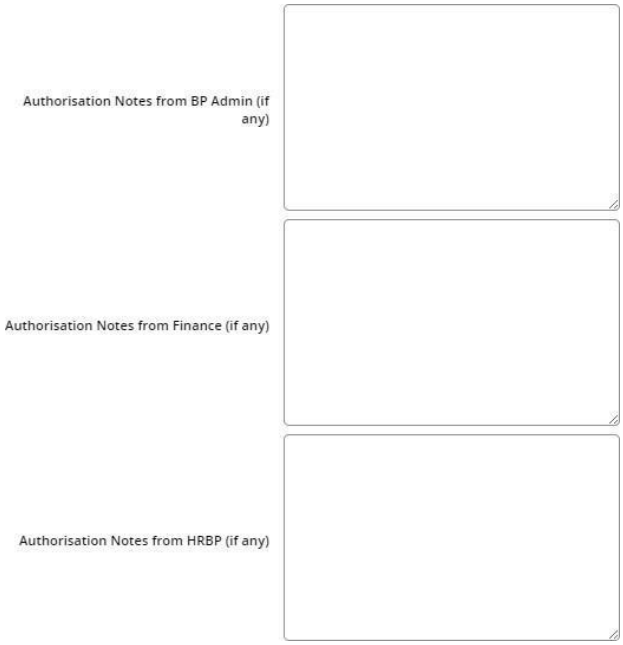
If your request to recruit has been rejected, you will receive an email notification of this advising which authoriser rejected the request. To view the reason for rejection, please log into iTrent **Recruitment** under your People Manager role and select the Recruitment link from the list on the home page.

Once selected you will be directed to your **Recruitment Summary**, with a list of links available. From here you should select the link **Rejected requisition search** under **Request to recruit**:

You should then search for your requisition using the Requisition Reference Number (REQ*****):



The page will then refresh to the Requisition Details page for this requisition and the reason for rejection can then be found at the bottom of the page at the relevant field for Authorisation Notes:



To resubmit your requisition, you should make the required changes noted by the authoriser. Once the changes have been made, you must then select the **Resubmission** dropdown at the **Reason for creation** field which sits near to top of the page:

You must ensure this field is updated to Resubmission. Failure to do so means that your request to recruit will not be resubmitted to the authorisers.

You must then select the relevant reason for the original Request to Recruit from the drop down:

Once all previous steps have been completed and you are satisfied with the changes made, you should then scroll to the bottom of the page and select **Save**:

This will then resubmit the request to recruit and you will receive an email notification confirming this.

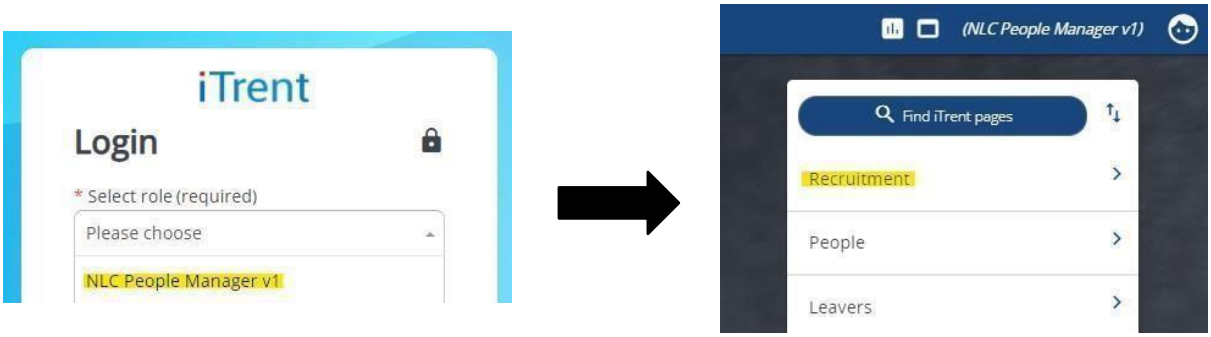
If you do not receive an email notification, please repeat the previous steps.

Requisition Published

After your request to recruit has been fully authorised, this will then be directed to the Workforce Resourcing team to progress to advert. You will then receive an email notification when the requisition has been published which will include the requisition name, reference number and application closing date.

Accessing Your Requisition

Once your requisition has been published, you should be able to access this at the **Recruitment summary**. You can find this by logging into myTeam under your People Manager role (or Panel Member role) and then selecting the **Recruitment** link:



You should then search for your requisition by searching the requisition reference number included in your Requisition Published email:

If you experience any issues accessing your requisition after it has been published, please ensure you try accessing this with both your People Manager role and Panel Member role (if available). If you do not have the Panel Member role please contact ESC-RecruitmentTeam@northlan.gov.uk for assistance.

Following Advert End Date

After the advert has closed, the Recruiting Manager will receive an email notification advising this. If after reviewing the number of applicants you decide you would like to re-advertise, you should contact ESC-RecruitmentTeam@northlan.gov.uk to confirm this and include the following:

- Requisition name
- Requisition reference number
- Whether the requisition should be re-advertised internally or externally
- How long this should be re-advertised for

A member of the team will then progress this accordingly.

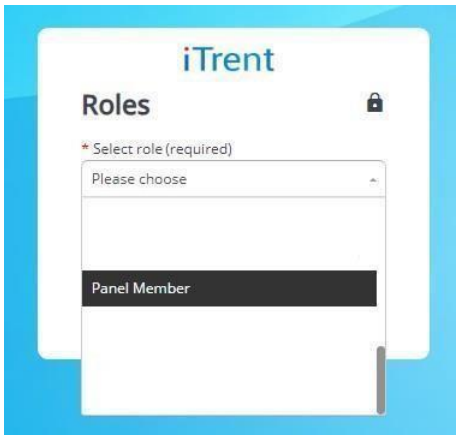
Shortlisting

If the advert for the requisition has closed and you are happy with the number of applicants; you can then begin shortlisting. To do so, the Recruiting Manager should

convene a meeting with the other Panel Members as soon as possible after the advert closes to shortlist the applicants and organise the interviews. This meeting can be done either in person or virtually.

Accessing Your Requisition

When accessing iTrent to commence shortlisting, if you cannot find your requisition using your People Manager role then you should use the Panel Member role:



If this role does not display as an option for you, please contact ESC-RecruitmentTeam@northlan.gov.uk for assistance. Your email should include the Requisition Name and Requisition Reference number, as well as your own name and employee reference number.

Panel Members

Panel Members should be confirmed by the Recruiting Manager when creating the request to recruit. This then allows the Workforce Resourcing team to provide Panel Members access to the requisition to ensure they can complete their shortlisting. If a member of the panel does not have this access, either the Recruiting Manager or Panel Member should contact the Workforce Resourcing team at ESC-RecruitmentTeam@northlan.gov.uk to confirm the following:

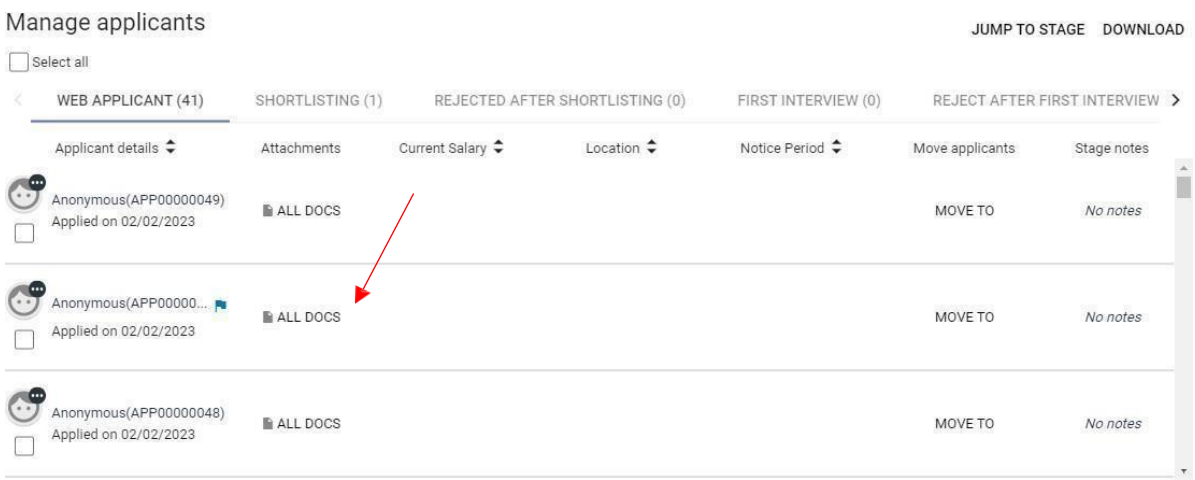
- Name of Panel Member(s) to be added (and payroll number(s) if known)
- Requisition name and reference number(s) (REQ*****) of those they require access to

Downloading Applications

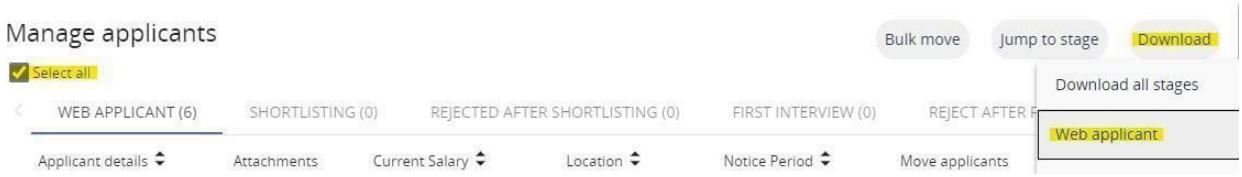
Once the advert has closed, all applicants will appear under the stage **Web Applicant** at the **Manage Applicants** area. Applicants will be anonymous and can be identified by their applicant reference number (**APP********).

If the applicant reference number is not totally visible, you can find this by hovering over the icon (often a blue flag will obscure the full number on the dashboard).

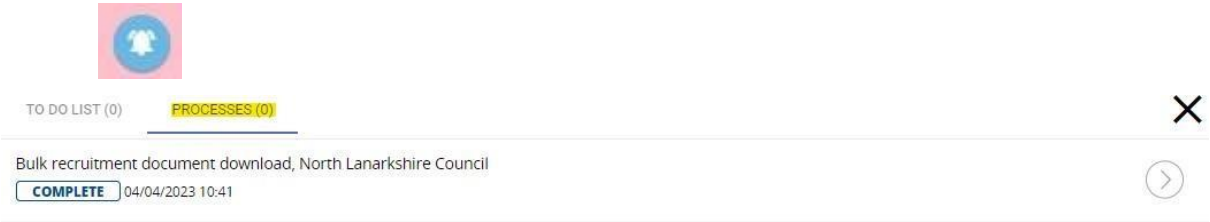
To view an application, you should select the attachment **ALL DOCS** for the relevant applicant and then select **Application print**:



To download multiple applications at once, you should **Select all**, then **Download** and then select **Web applicant**:



You will then be asked to confirm this and, after selecting OK, you will receive a notification from iTrent advising the download will be run in the background and that you will be notified once completed. Once the download has been completed, the notification will appear at the top of the page, where you should then select the bell notification icon (below) which will then display the following:



Here you should select **Processes**. After selecting the relevant result, you will be directed to a page titled **Download output** which will then allow you to download the applications in bulk.

Applicants Displaying a Blue Flag

Applicants who confirm themselves as any of the following can be identified by a blue flag next to their name (as seen in the example below):

- We are a Disability Confident Leader and offer a guaranteed interview to applicants who consider themselves to be disabled and who meet the essential criteria for the job. Reasonable adjustments to support equal opportunity to perform at an interview must be made also.
- We also have the guaranteed interview scheme for supported employment applicants, like applications from Employment Initiative, Family Firm, Project Ability, Routes to Work, Pathway Programme – Winter Leaver.
- The guaranteed interview scheme also includes veterans, reservists, service leavers and service leavers' spouses. Find out about the Armed Forces Covenant here. For more information on the issues faced by ex-service personnel, there is an e-learning course on learn NL.
- North Lanarkshire Council is committed to #KeepingThePromise. This means that if you have ever been in care (looked after at home with a social worker, lived with a relative other than your parents, experienced foster, residential or secure care) you are entitled to a guaranteed interview for this position if you meet the essential criteria of the person specification/job description. This is one way North Lanarkshire is demonstrating our commitment to supporting Care- Experienced People.

These applicants should be guaranteed an invite to interview if they meet all of the essential criteria, so please ensure you take a note of their application reference number when completing your shortlisting.

Progressing to Shortlisting

To progress to shortlisting, at the **Manage Applicants** dashboard, you should **Select all** applicants sitting under the stage **Web Applicant** and then **Bulk move** them to the **Shortlisting** stage. This will then allow you to commence shortlisting.

Once all applicants are sitting under the **Shortlisting** stage, the shortlisting form can be accessed at the link **Shortlist Applicants**:

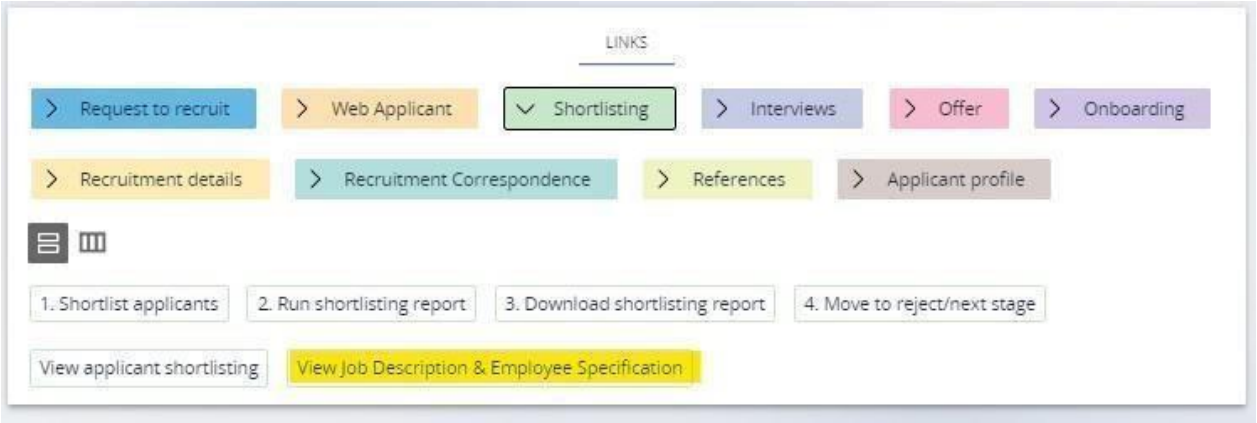
These links will be available on both Recruiting Manager and Panel Member roles.

Known Applicants

Applicants at the shortlisting stage will now be anonymised and are therefore not identifiable. Previous guidance on known applicants therefore does not apply at the shortlisting stage.

Shortlisting Applicants

When completing the online shortlisting proforma, each applicant should be scored against the criteria set out under the employee specification. The panel must ensure all applicants are shortlisted. You can access the Job Description & Employee Specification at the below link, which sits under **Shortlisting**:



Please note that only one person is required to complete the online shortlisting forms on behalf of the Panel.

Non-Teaching Requisitions

Each applicant should be scored against the criteria detailed with each respective section of the employee specification using the scoring matrix below:

Qualifications/Training, Work Experience, Knowledge/Skill/Ability, Personal Qualities/Attributes, Other

Essential criteria

Criteria information	Shortlisting question	Shortlisting response	Criteria score	Comments
Qualifications & Training (essential) Factor Assessed as per Employee Spec (e.g. Qualifications & Training)				
Work Experience (essential) Factor Assessed as per Employee Spec (e.g. Work Experience)				
Knowledge/Skill/Ability (essential) Factor Assessed as per Employee Spec (e.g. Knowledge/Skill/Ability)				
Personal Qualities/Attributes (essent) Factor Assessed as per Employee Spec (e.g. Personal Qualities/Attributes)				
Other (essential) Factor Assessed as per Employee Spec (e.g. Other)				

Please refer to the employee specification for the position when completing your applicant shortlisting. The shortlisting should be carried out in two parts with the essential and desirable criteria scored separately. When assessing an application against the employee specification, these sections should be scored on a scale of 0 to 4, as outlined below:

0 – No evidence provided/not applicable
1 – Applicant mentions some of the criteria
2 – Applicant mentions all criteria
3 – Applicant mentions some of the criteria and provides relevant supporting examples
4 – Applicant mentions all criteria and provides relevant supporting examples

For the Qualifications & Training factors, you should score the applicants as follows:

- **If there is only one qualification on the employee specification, they should be scored either 0 if they do not have this or 4 if they have this.**
- **If there are two qualifications on the employee specification, they should be scored 0 if they do not have either, 2 if they have one of the qualifications or 4 if they have both.**

While there may be more than 2 qualifications in this section, please ensure these are scored at the relevant sections for those that are Essential and those that are Desirable (if applicable).

There is a **Comments** field available for each criteria section and this should only be used for any additional/supporting information relating to the scoring. Please be mindful that any information included in these fields will be made available to an applicant in the event of a subject access request.

Once you have completed the shortlisting form, please ensure you select **Save** at the bottom of the page before moving on. You should then repeat for all applicants under the requisition.

The recruitment panel should then decide which applicants will make the interview shortlist.

Teaching Requisitions

For teaching requisitions, the criteria and scoring system reflect the previous shortlisting proforma and should be completed in the same manner. Applicants should be scored as either a 0 or 1 for each of the listed criteria, with a comments box available for supporting information:

Criteria information	Shortlisting question	Shortlisting response	Criteria score	Comments
Present Post/ School Present Post/ School				
Qualifications Qualifications				
Experience Experience				
Professional Development Professional Development				
Working with and leading people Working with and leading people				
Management Skills Management Skills				
Communication Skills Communication Skills				
Implementing Change Implementing Change				
Inter Personal Skills Inter Personal Skills				

The comments field should only be used for any additional/supporting information relating to the scoring. Please be mindful that any information included in these fields will be made available to an applicant in the event of a subject access request.

Shortlisting in Bulk

For requisitions with a high volume of applicants, you can shortlist in bulk using a spreadsheet proforma and upload this to iTrent as a document attachment. To do this,

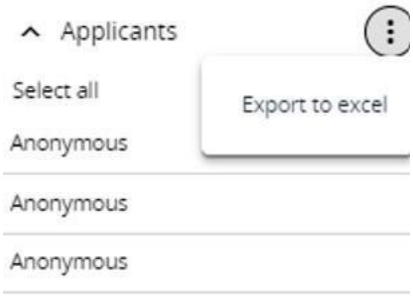
1. Move applicants from “Web Applicant” stage to shortlisting.

2. Download the shortlisting proforma by clicking on the link under the “Shortlisting” tab:

   Download Shortlisting Proforma - "NLC - Shortlisting Proforma v1"

3. Copy & Paste APP numbers from iTrent to the Shortlisting Proforma - this can be achieved by the following steps: Click on “Shortlist Applicants”

Click the 3 dots and press “Export to Excel”:



4. You can then copy the APP numbers from the excel downloaded document to the Shortlisting pro-forma.

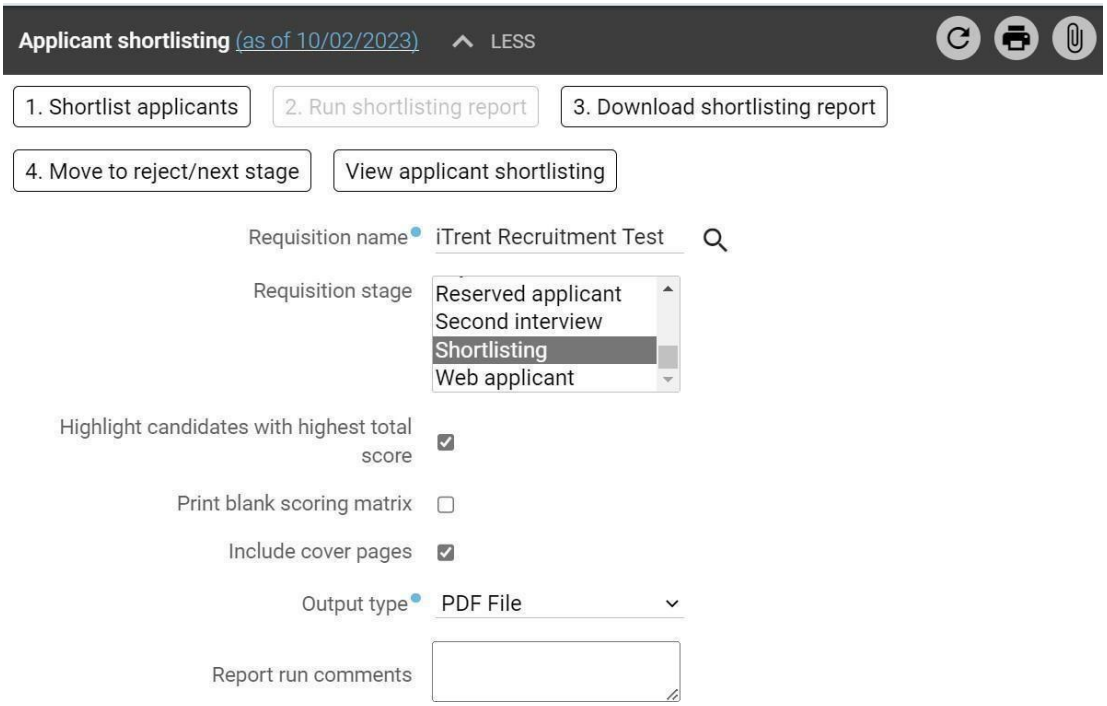
5. Once you have shortlisted, you should then upload the proforma to iTrent:

Upload Shortlisting Proforma

You should then follow the below guidance for moving applicants to the next stages/rejection.

Progressing Completed Shortlisting

Once all members of the panel have completed their shortlisting for all applicants, the member of the panel responsible for progressing to interviews should progress through the remaining **Shortlisting** links, beginning with **Run Shortlisting Report**. Selecting this link will then refresh the page and the left panel will display a number of options for Recruitment Reports. Here you should select **Applicant Shortlisting** and the effective date should be the current date. You should then see the following page and complete as below:



At requisition name, select the magnifying glass and then search/select your requisition. At Requisition stage, you should select the stage **Shortlisting**. You should then ensure the checkbox is selected for **Highlight candidates with highest total score**.

After this you should select **Run** and will then receive an iTrent notification and an email once the report is ready. Once this is ready you should return to the menu at the top and then progress to the link **Download Shortlisting Report**. You can then download a copy of the report which will identify the highest scoring applicants. This will allow you to identify which applicants should be progressed to interview.

iTrent North Lanarkshire Council

Applicant Shortlisting

Requisition: iTrent Recruitment Test
Stage(s): Shortlisting
Highlight candidates with highest total score: Yes

Stage: Shortlisting

Requisition name: iTrent Recruitment Test
Response range: 0 – 4
Total number of applicants: 10

Applicant Name (Applicant Reference)	Essential					Desirable					Total
	Knowledge/Skill/ Ability (essential)	Other (essential)	Personal Qualities/Attributes (essent)	Qualifications & Training (essential)	Work Experience (essential)	Knowledge/Skill/ Ability (desirable)	Other (desirable)	Personal Qualities/Attributes (desir)	Qualifications & Training (desirable)	Work Experience (desirable)	
ANON. (APP00000002)	4	4	4	4	4	4	4	4	4	4	40
ANON. (APP00000090)	0	0	0	0	0	1	1	1	1	1	5
ANON. (APP00000091)	3	3	3	3	3	3	3	3	3	3	30
ANON. (APP00000092)	3	3	3	3	3	4	4	4	4	4	35
ANON. (APP00000093)	2	2	2	2	2	3	3	3	3	3	25
ANON. (APP00000094)	2	2	2	2	2	2	2	2	2	2	20
ANON. (APP00000095)	1	1	1	1	1	1	1	1	1	1	10
ANON. (APP00000096)	1	1	1	1	1	0	0	0	0	0	5
ANON. (APP00000098)	4	4	4	4	4	3	3	3	3	3	35
ANON. (APP00000100)	0	0	0	0	0	0	0	0	0	0	0

10/02/2023
08:39:50

denotes highest scoring applicant(s)

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In the above example, we have used the highlighter tool on Adobe Acrobat Reader to note the highest scoring applicants to be progressed to interview. You will require to either highlight or take a note of these applicant's reference numbers for the following steps in order to progress them correctly.

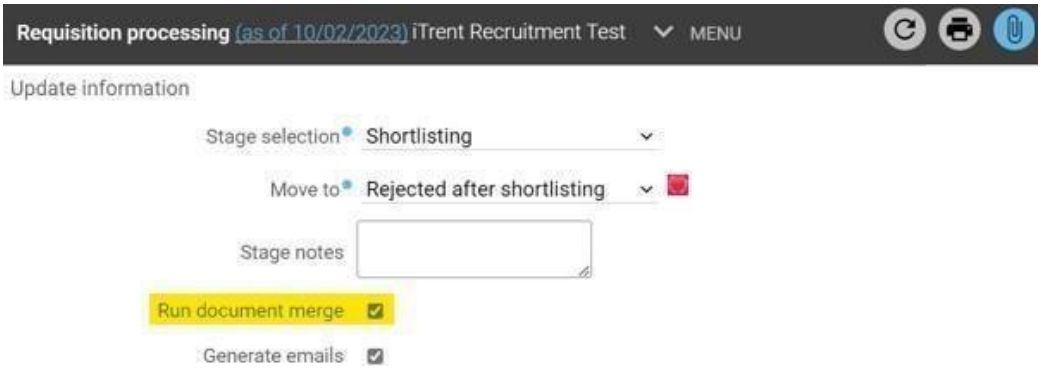
Please note you should not use the total score column and should instead refer to the essential scores first and foremost.

Your applicants for interview should be those who scored highest on the essential criteria. If there are a significant number, you can narrow the pool for interview by selecting those who scored highest on the desirable criteria. For example, both APP00000093 & APP00000094 scored 2 for all essential criteria on the above, however APP00000093 is being progressed to interview as they scored higher on the desirable criteria.

Rejecting Unsuccessful Applicants

Once you have noted the application reference numbers of those to be progressed, you should move to the link **Move to reject/next stage**. At this stage you should select **Shortlisting** at **Stage selection** and then begin by moving unsuccessful applicants to **Rejected after shortlisting**.

When rejecting applicants, you must select the checkbox for Run document merge to ensure they receive an email advising them of their outcome:



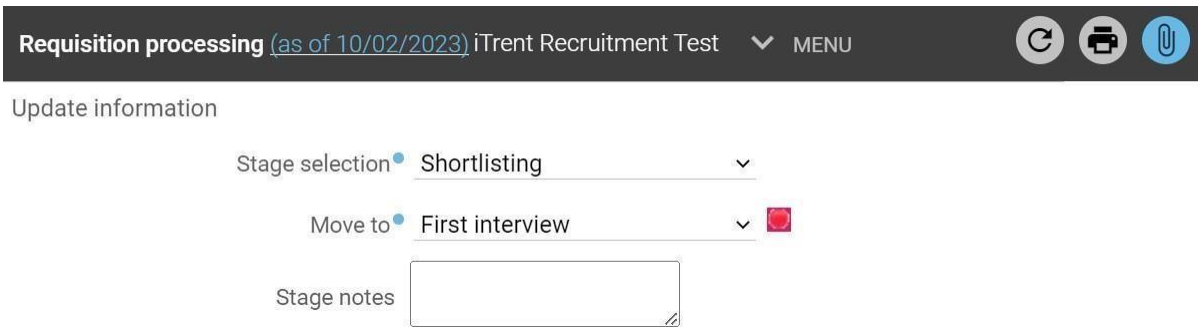
Once you have updated as above, you should select those applicants who will be rejected and then select **Save.**

Applicants

Applicant name	Applicant stage	✓
Anonymous (APP00000002)	Shortlisting	☐
Anonymous (APP00000096)	Shortlisting	☑
Anonymous (APP00000095)	Shortlisting	☑
Anonymous (APP00000093)	Shortlisting	☐
Anonymous (APP00000090)	Shortlisting	☑
Anonymous (APP00000098)	Shortlisting	☐
Anonymous (APP00000100)	Shortlisting	☑
Anonymous (APP00000091)	Shortlisting	☐
Anonymous (APP00000092)	Shortlisting	☐
Anonymous (APP00000094)	Shortlisting	☑

Progressing Applicants to Interview 1

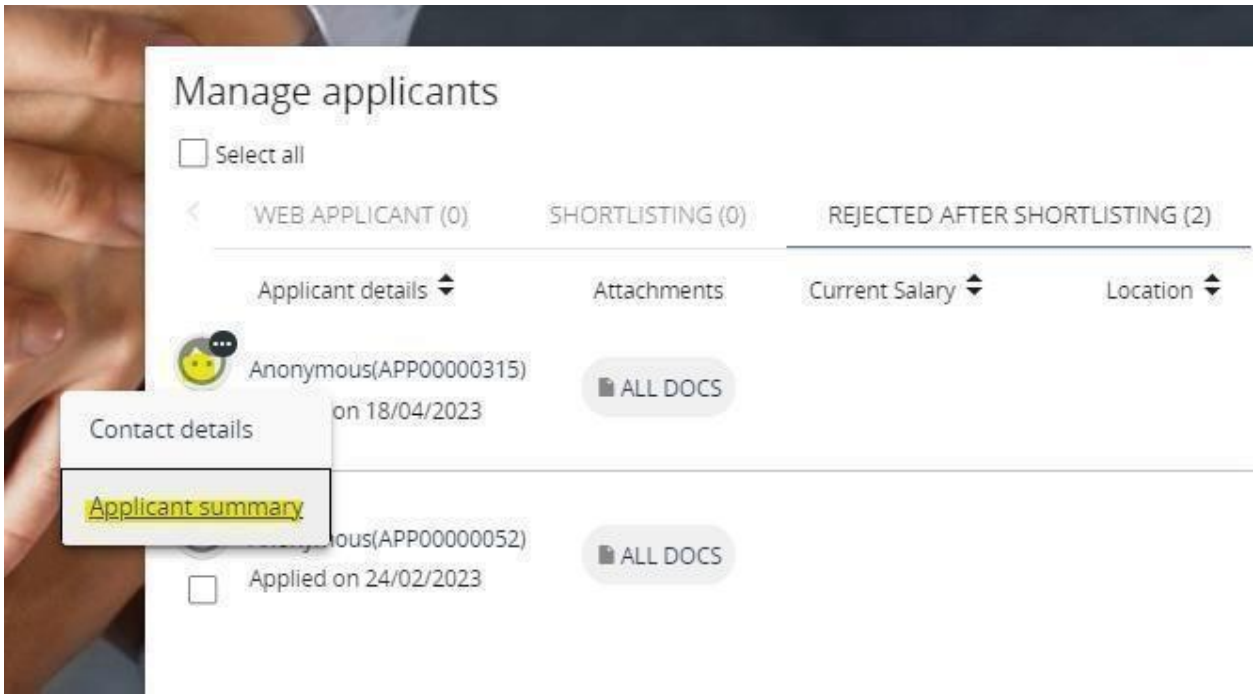
The page will refresh and you should then return to the **Move to** field. This should be updated to **Interview 1** and then you should select the remaining applicants and select **Save**. Doing so will then move your remaining applicants to the stage **First Interview**.



You have now completed your shortlisting and can progress to interviews.

How to Check Rejection Email has been Generated

To check that the rejection email has been generated, you should go to the stage **Reject After Shortlisting**, select the icon for an applicant and then select **Applicant summary**:



From this screen you will then be able to see the list of **Correspondence**, including details of the date and time this was generated:

If you cannot see this correspondence listed, you should move the affected applicant(s) back to the **Shortlisting** stage and then follow the instructions at Rejecting Unsuccessful Applicants again.

Please note that generated correspondence runs on a daily batch and will not send to the rejected applicants instantly.

No Suitable Applicants

If the panel determines there are no suitable applicants after completing their shortlisting, you should contact ESC-RecruitmentTeam@northlan.gov.uk to confirm whether or not you wish to re-advertise and a member of the team will progress this accordingly.

If you would like to re-advertise, you should confirm the following details in your email:

- Requisition name
- Requisition reference number
- Whether the requisition should be re-advertised internally or externally
- How long this should be re-advertised for

Interviews

Recruitment Panel

The recruitment panel should consist of at least 2 panel members. The panel members should be aware of the following when applicants are moved to interview 1 and are no longer anonymous:

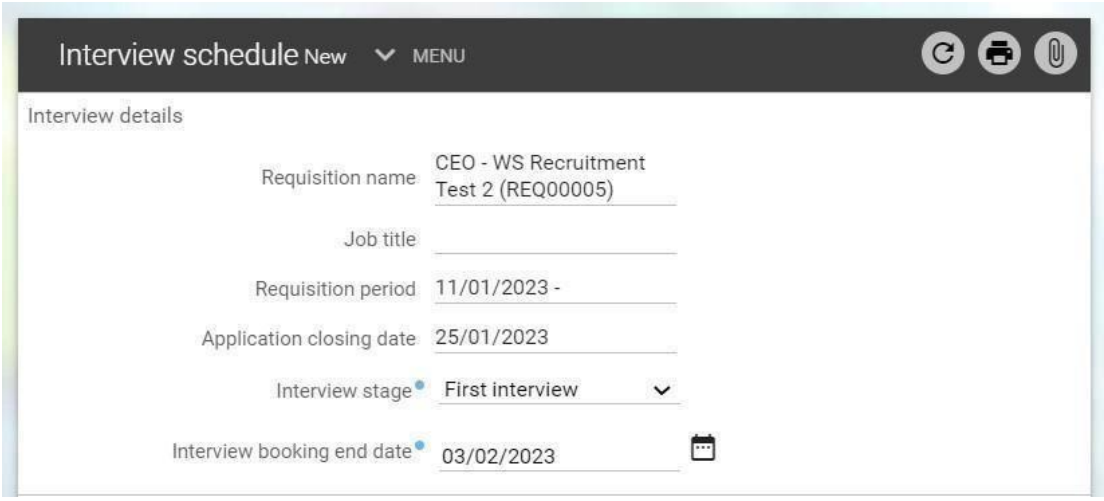
- **Personal relationship** – If a panel member identifies an applicant that they have a personal relationship with then the panel member will not be permitted to take part in the recruitment panel.
- **Objectivity** – Any panel member who feels that their knowledge of an applicant would seriously compromise their objectivity should withdraw from the selection process. It is the responsibility of the panel member to declare this interest. Failure to do so and to continue to participate in the recruitment process will be deemed a breach of policy and the employee may be subject to disciplinary action under the Disciplinary Policy.
- **Internal applicant** - If an internal applicant is applying for a position, and the applicant's line manager is participating in the recruitment process, this is deemed to be a professional relationship and the panel can continue as is.

If you have concerns over any of the above, please contact the Workforce Resourcing Team for further advice at: ESC-RecruitmentTeam@northlan.gov.uk

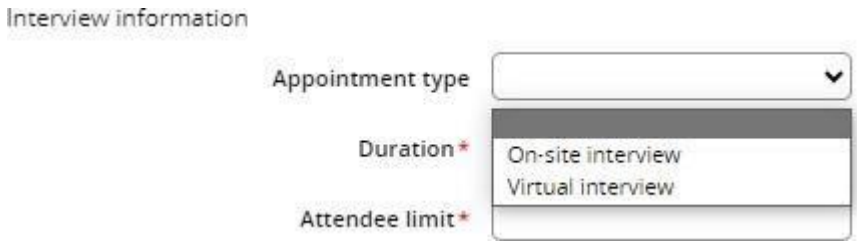
Progressing to Interview

Before you invite applicants to interview, you first need to create the interview schedule, which details the slots that are available for interviews. To do this you should select the link **1. Create interview schedule** from within the **Interviews** section:

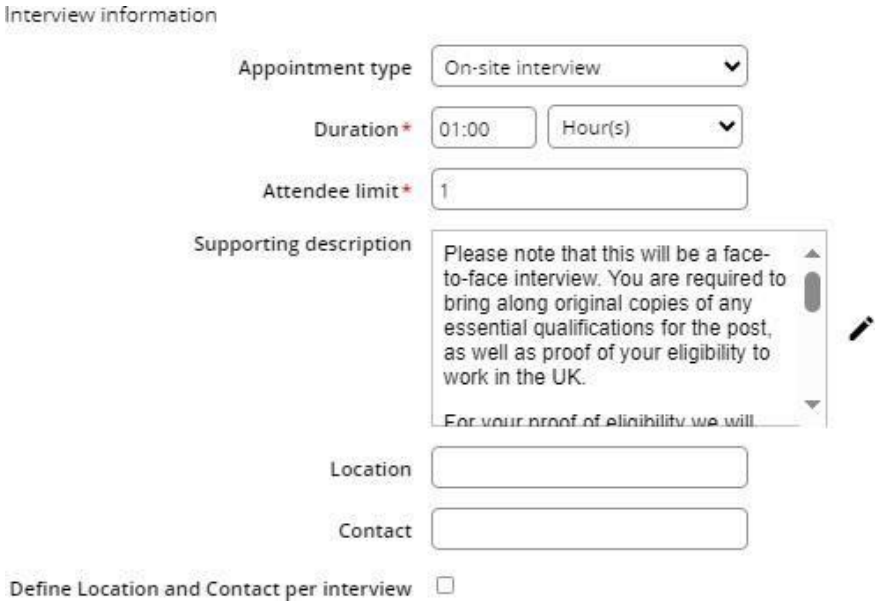
At the **Interview stage** field you should select whether this is a first or second interview from the drop-down list. You should then update the **Interview booking end date** field to the date where you wish the interview booking to close. We would recommend allowing applicants to book interview slots until at least 3 days prior to the interview date. Once this date has passed, the applicants will not be able to book their interview slot:



Within **Interview information** section, the **Appointment Type** field should be updated to either On-site or Virtual interview:



Once selected, the page will refresh and a number of the following fields will then be populated:



The **Duration** field will automatically update to 01:00 hour, however this can be amended to suit the interview durations that you want to set.

The **Attendee limit** is the limit of how many applicants can book each interview slot. If you only wish to interview one applicant per interview slot, this should remain as 1. If however you are conducting group interviews, this field should be updated to the maximum number of applicants you can accommodate at each interview slot. Further guidance on group interviews can be found here.

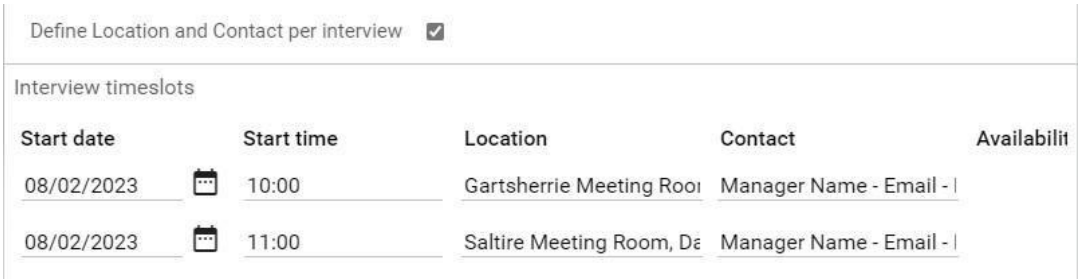
The **Supporting description** field will be populated with information relating to the option selected at the **Appointment** type field. You can then add further information for the applicants by selecting the pen icon. This would include information such as the format of the interview (for example: question and answer format/group interview) and details of any tasks to be completed on the day or presentations to be sent prior to interview (including email address of who these should be sent to and by what date/time). The text included at this field will appear on the email invitation to interview, so you should ensure the applicant has all the information they will require.

The **Location** and **Contact** can be added at these fields if the location and contact is the same for every interview. If this is the case, you should update these field

accordingly. These fields are free text and will allow you to enter names and phone numbers/email addresses. However, if the location and/or the interview contact will differ for some interviews (for example, interviews over multiple days or with different lead interviewers) then you should leave these sections blank.
Within the **Interview timeslots**, enter the **Start date** and **Start time** of each interview slot. You can then use the **+** and **–** icons to add or remove slots:

If you wish to set up interview slots with different locations and contacts, you should select the tick-box for **Define Location and Contact per interview**. This will then refresh the page and allow you to define the **Location** and **Contact** per interview slot.

You can then enter the location and contact for each timeslot:



You should then select **Save** once you have scheduled your interviews and are ready to progress.

Virtual Interviews

For virtual interviews, please note that after these have been scheduled on iTrent, it is the panel's responsibility to schedule the Microsoft Teams invites off iTrent. You can find each applicant's email address and interview slot by accessing the link **2. Interview invitations** under **Interviews**:

The page will then refresh and the applicant booking information can be found at the bottom, including their email address and their interview slot if they have booked one:

Candidates

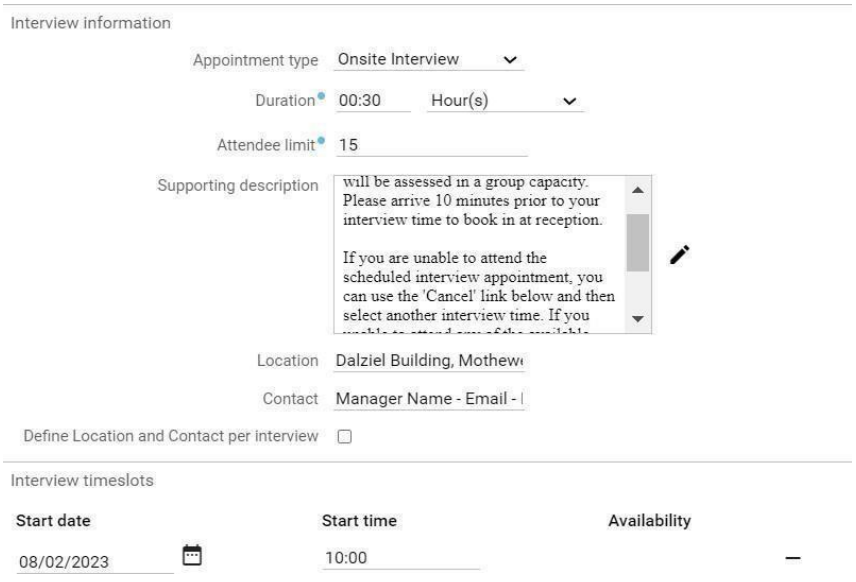
Name	Email address	Web applicant	Current stage	Invited	Booked
Mr August Fourteenth	augustfourteenth1408@outlook.com	Yes	First interview	No	No
Mr August Fourteenth	augustfourteenth1408@outlook.com	Yes	First interview	31/08/2023	11/09/2023 09:30

Group Interviews

If you wish to conduct group interviews, within the **Attendee limit** field you should enter the maximum number of applicants you wish to interview per slot. This will then enable that number of applicants to book each available interview slot.

In the example below, the manager wishes to invite 15 applicants to the one group interview within Dalziel Building, Motherwell.

The **Attendee limit** field should therefore be set as 15 and the **Supporting description** should be edited to advise applicants that it will be a group interview. Within the **Interview timeslots** section, only one interview timeslot is required as all applicants will be invited to interview on the same date and at the same time:

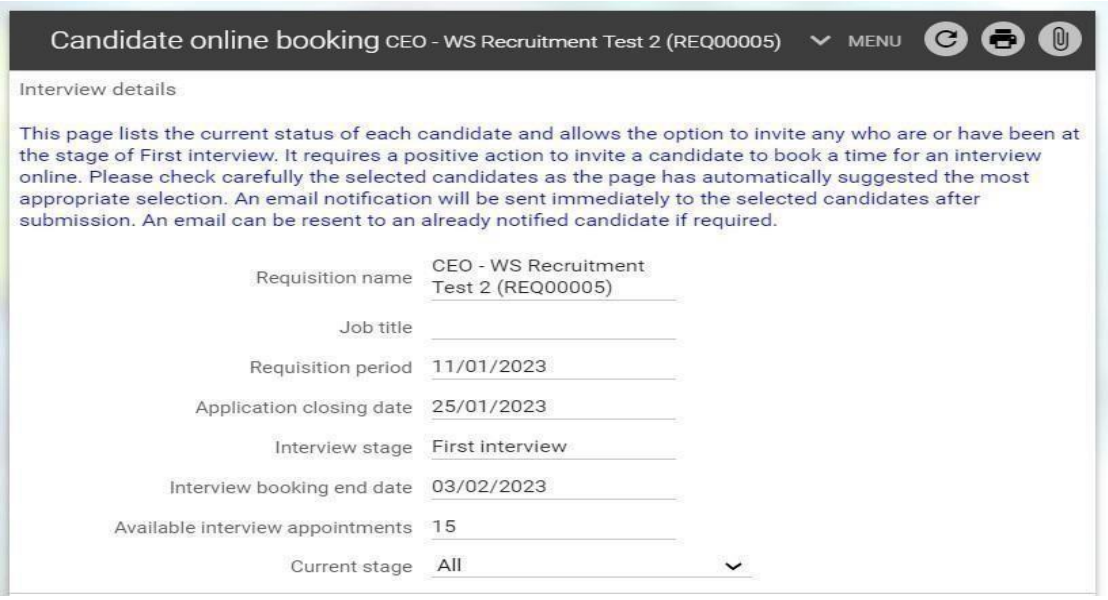


Once you have updated the necessary field you should then select **Save**.

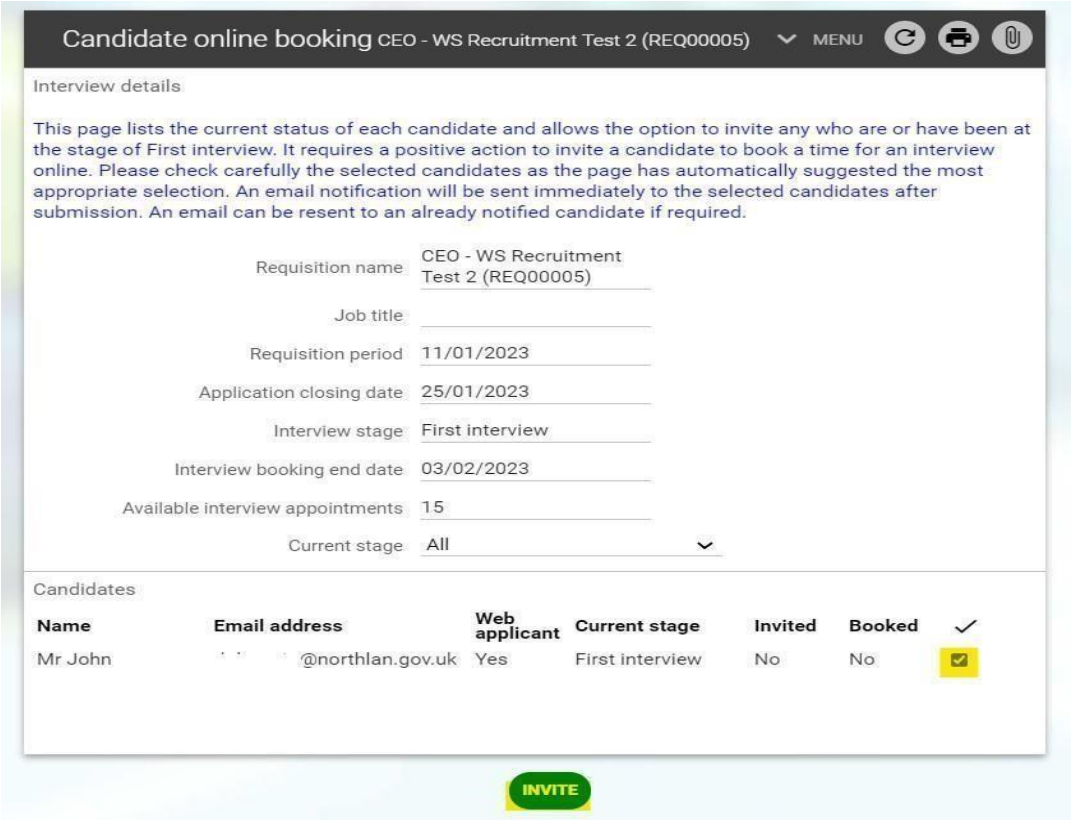
Inviting Applicants to Interview

Once the interview schedule has been created you can then invite the applicants to interview. To do this you should select **2. Interview invitations** under the **Interviews** section:

The page will then refresh, with the relevant fields populated from the requisition details and the interview schedule created at the previous step. Within the **Current stage** field, please ensure you select either the “First interview” or “Second interview” dropdown option. This will ensure only the applicants who have been successful in gaining an interview are invited.



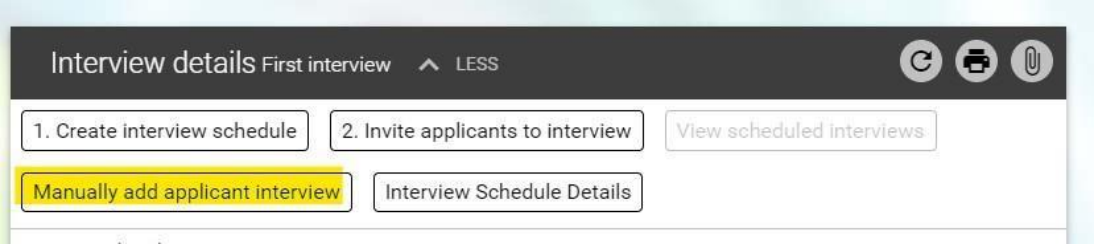
Within the **Candidates** section, the applicants who are at this stage will automatically display. To invite them, ensure the tick-box under the tick icon is selected for every applicant and then select the **Invite** button:



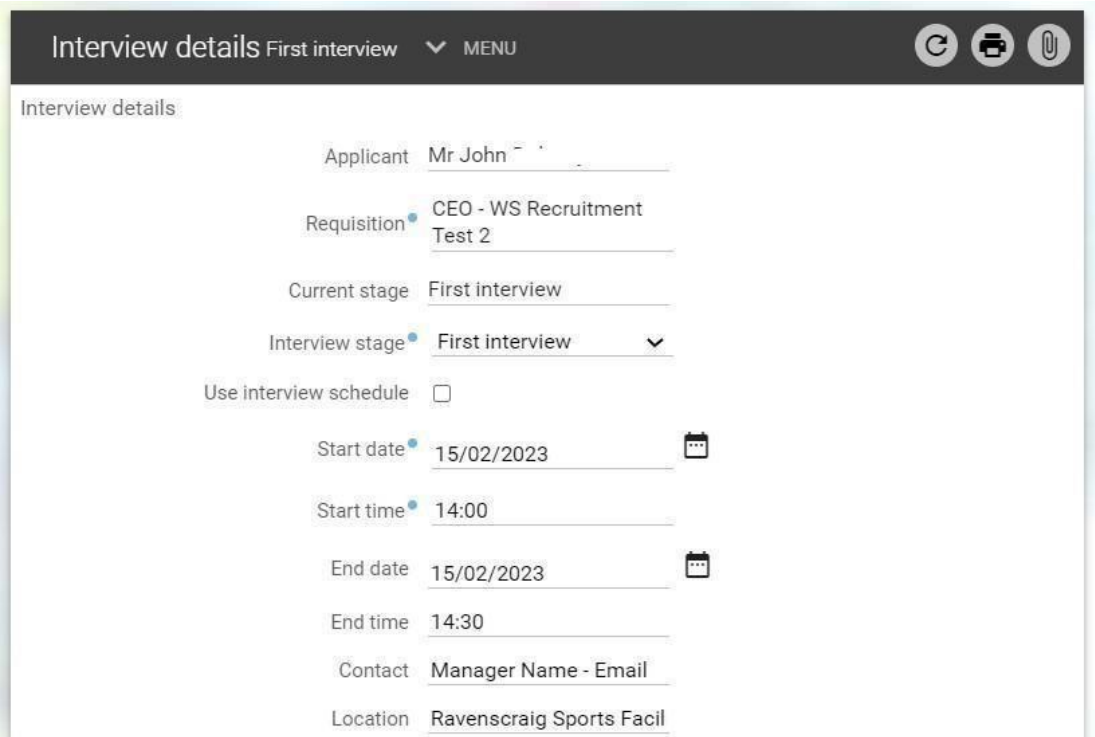
It is important to double check the applicants are all at the correct **Current stage** to ensure you are only inviting applicants who should be progressed to interview, as once you select **Invite** the applicants will be sent an email immediately.

Rescheduling an Interview

If an applicant contacts you to advise they are unable to attend the interview at the provided date(s) and time(s), you can manually enter a new interview date and time agreed by yourself and the applicant. To do this you should select the link **Manually add applicant interview** from the menu at the top of the page:



The page will then refresh as below, allowing you to create new interview slots. First you should select the magnifying glass icon at the **Applicant** field and search for the applicant. The **Interview stage** field should then be updated to either **First Interview** or **Second Interview**. You should then enter the alternative interview date and time under **Start date** and **Start time**, as well as updating the **Contact** and **Location** fields with the relevant information:



Interview Assessment Forms

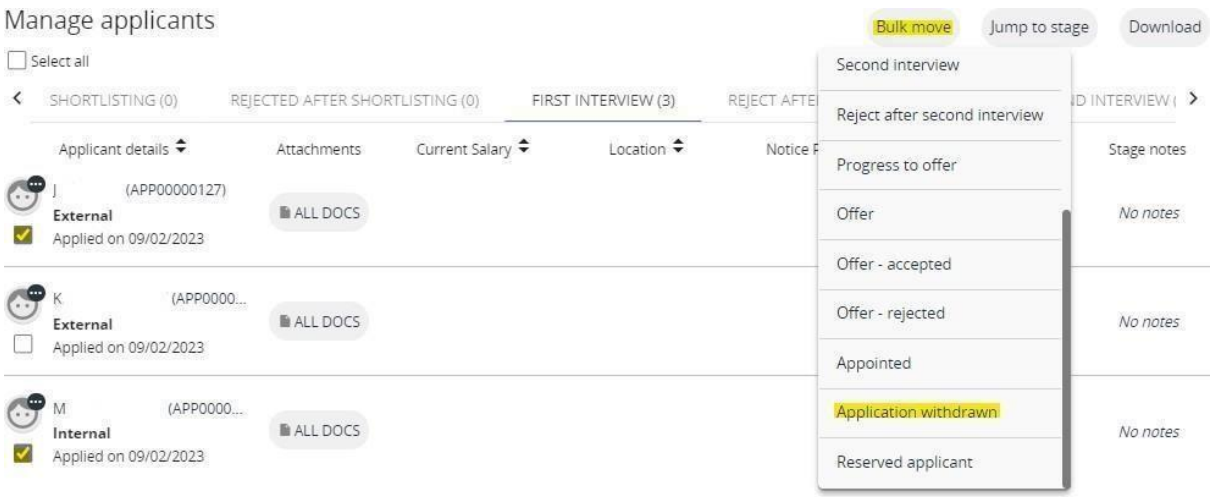
The process for the Interview Assessment Forms has not changed. All interview assessments and associated recruitment documentation for the unsuccessful applicants should be retained by the interview panel in line with retention schedules and destroyed after 6 months. You can find the relevant Interview Assessment Forms at the following links:

- Non-Teaching Interview Assessment Form
- Teaching Interview Assessment Form

The Professional Dialogue Form is also available for relevant promoted Teacher positions.

Applicants Who Did Not Attend Interview

Following interviews, any applicants who did not attend should be actioned as follows. Under the **Manage applicants** area within your requisition, you should select the applicant(s) who did not attend interview and then **Bulk move** them to the stage **Application withdrawn:**



The effective date should then be confirmed as the current date. Once selected, you will see an overview of the applicants to be moved to the **Application withdrawn** stage. After double-checking the details are correct, you should then select **Save**. The page will then refresh and return to the **Manage applicants** area, where these applicants will now appear under the stage **Application withdrawn**. If this does not update instantly, please refresh the page by selecting the highlighted icon at the top of the page:

Rejecting Applicants after Interview

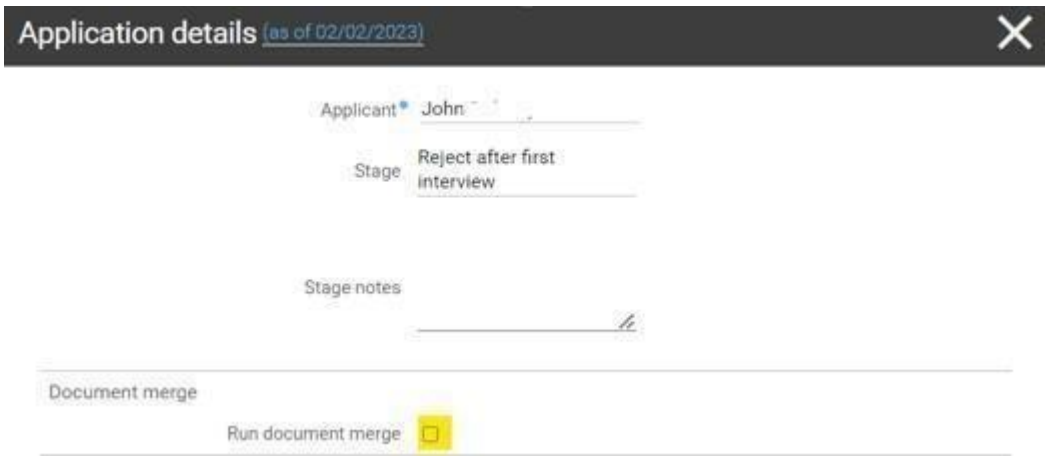
Once you have conducted your interviews and the panel has decided the successful applicant(s), you should move the unsuccessful applicants to the **Reject After First Interview** stage.

We would however recommend that you contact the successful applicant(s) to confirm that they are happy to accept the position before progressing anything on iTrent recruitment.

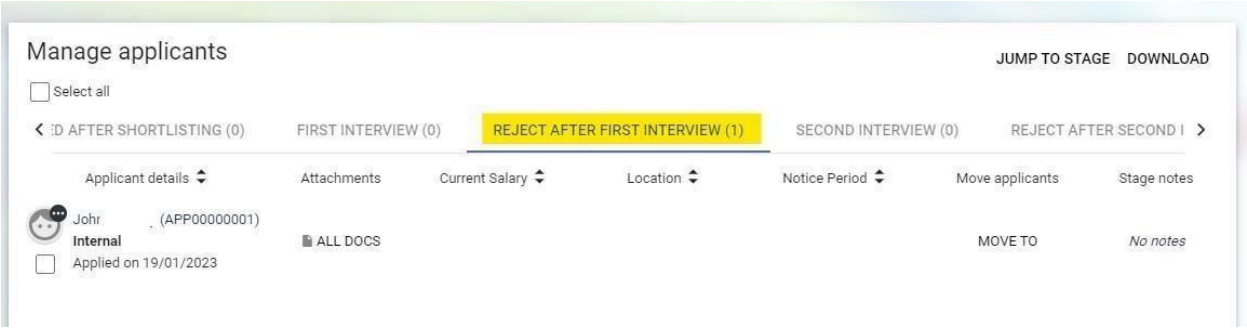
Once you have done so, you can progress with rejecting the unsuccessful applicants. Within the **Manage Applicants** of your requisition, ensure you are within the **First Interview** stage:

Here you should select each of the unsuccessful applicants by clicking on the tick-box underneath the face icon, select **Move to** and then select the stage **Reject after first interview**:

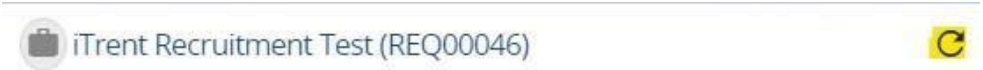
When rejecting applicants at this stage, you must ensure you select "Run document merge" and then click "Save" This will then issue a notification to the applicant to advise that they have been unsuccessful following their interview:



You can check that this process has worked by selecting the **Reject After First Interview** stage and should then be able to find the rejected applicants:



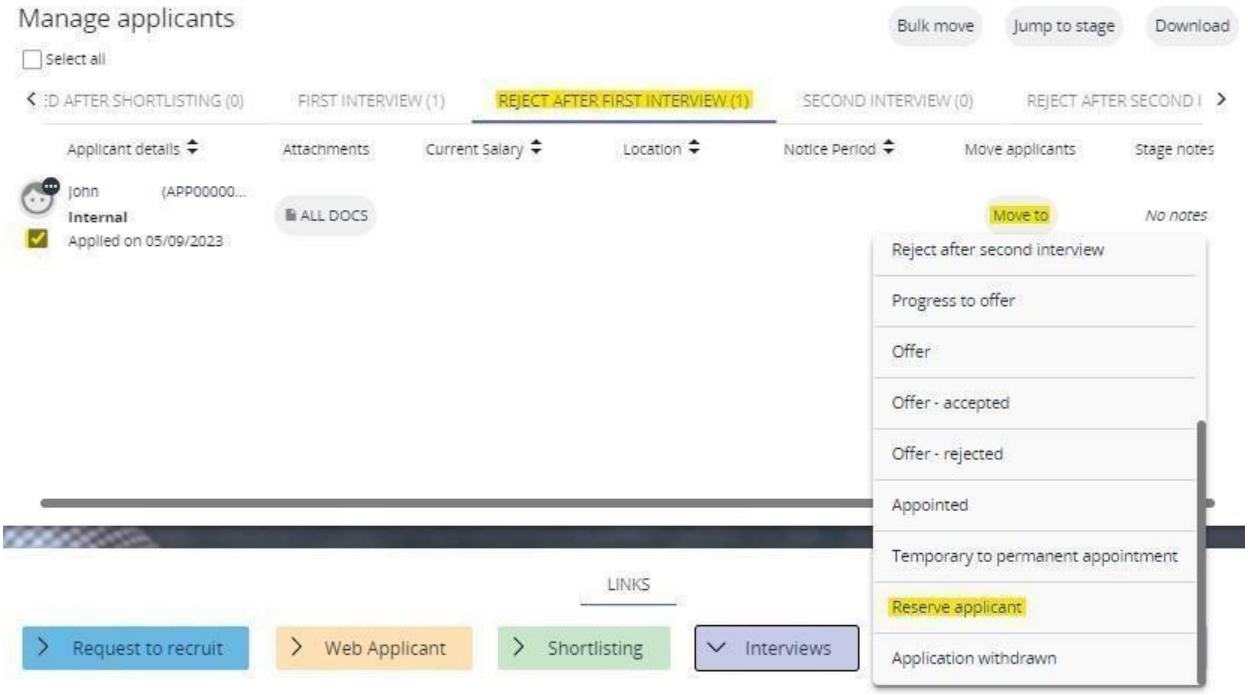
If the rejected applicants do not display at this stage, please select the refresh icon at the top of the page:



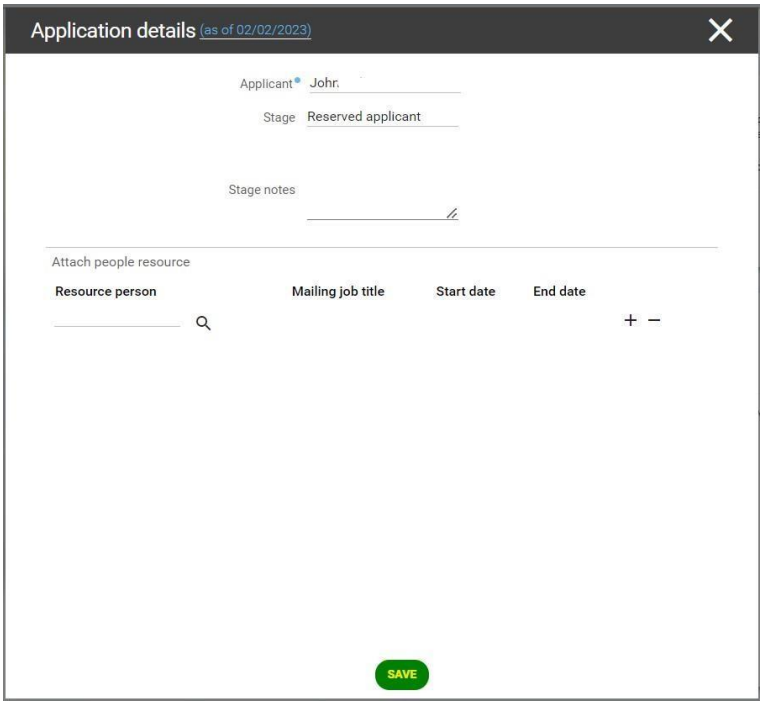
The process above is the same for second interviews, however, instead of selecting **Reject After First Interview** you should select **Reject After Second Interview**.

Reserve Applicant

If you have a reserve applicant for the requisition, you should firstly carry out the above step to ensure the applicant is notified they have been unsuccessful. At the **Manage Applicants** section, you should select the relevant stage **Reject After First Interview** or **Reject After Second Interview**, select **Move to** and then select **Reserve Applicant** from the drop-down options:



The following **Application details** screen will then appear. You should then select **Save** and this will move the applicant to the **Reserve applicant** stage:



The applicant will then appear under the **Reserve Applicant** stage:

Please ensure before moving an applicant to the Reserve Applicant stage that they are included when rejecting the unsuccessful applicants, as otherwise they will receive no email correspondence following their interview.

No Suitable Applicants

If the panel determines there are no suitable applicants after completing their interviews, they should contact ESC-RecruitmentTeam@northlan.gov.uk to confirm whether or not they wish to re-advertise and a member of the team will progress this accordingly.

If you would like to re-advertise, you should confirm the following details in your email:

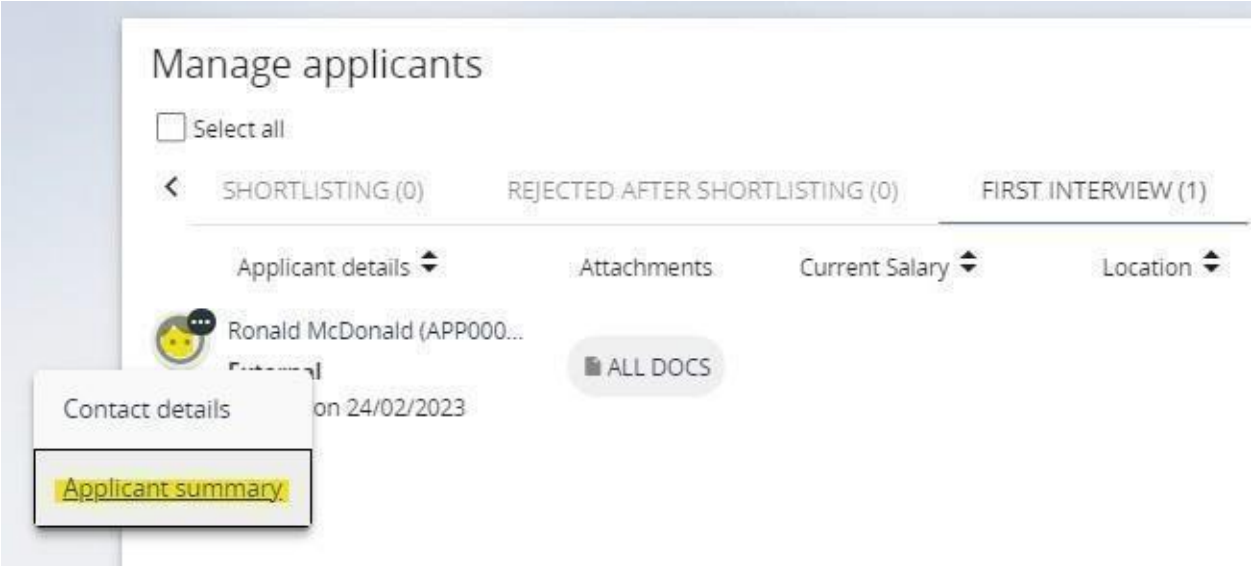
- Requisition name
- Requisition reference number
- Whether the requisition should be re-advertised internally or externally
- How long this should be re-advertised for

Progressing to Offer

If the panel determines there are suitable applicants after interviewing, you should progress as follows.

Contacting the Successful Applicant(s)

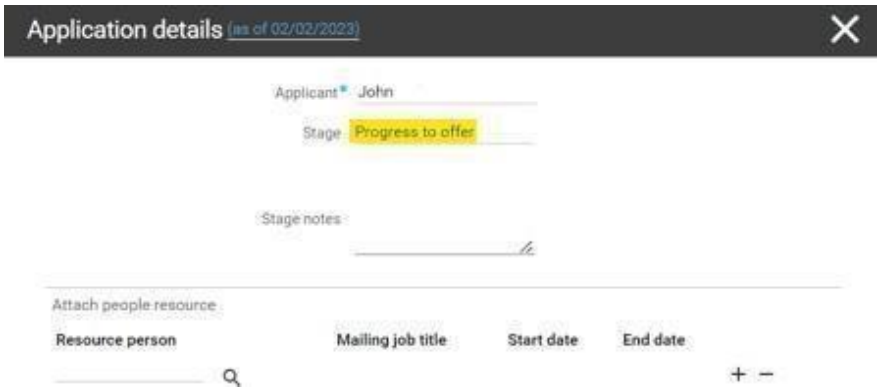
Before progressing on iTrent recruitment, you should contact the successful applicant(s) to let them know they have been successful at interview. An applicant's contact details can be found in their **Applicant Summary** which can be accessed by selecting the person icon beside their name:



Moving Applicant Stages

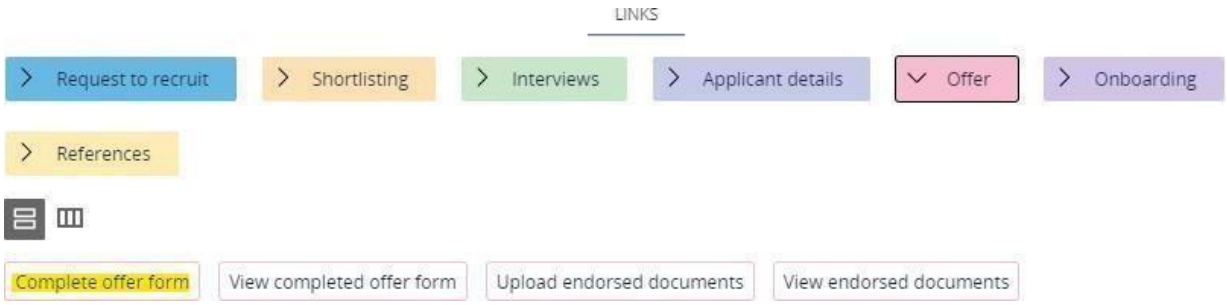
You should select those you wish to offer a vacancy from their current stage (either **First Interview** or **Second Interview**) by selecting the checkbox under the person icon, select **Move to** and then select **Progress to Offer** from the dropdown:

The **Application details** screen will appear, please ensure the **Stage** is showing as **Progress to offer** and select **Save**:

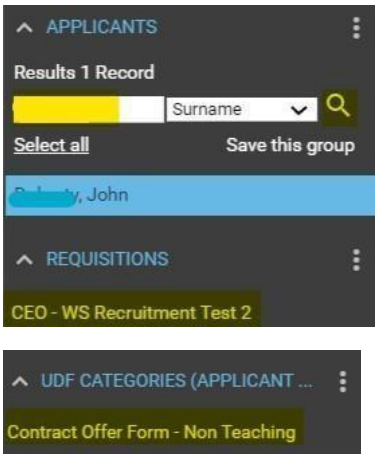


The applicant(s) will then appear under the **Progress to Offer** stage. This will then notify the Workforce Resourcing Team that an offer has been made and that they can progress with the pre-employment checks once you have completed your Contract Offer Form(s) for the successful applicant(s).

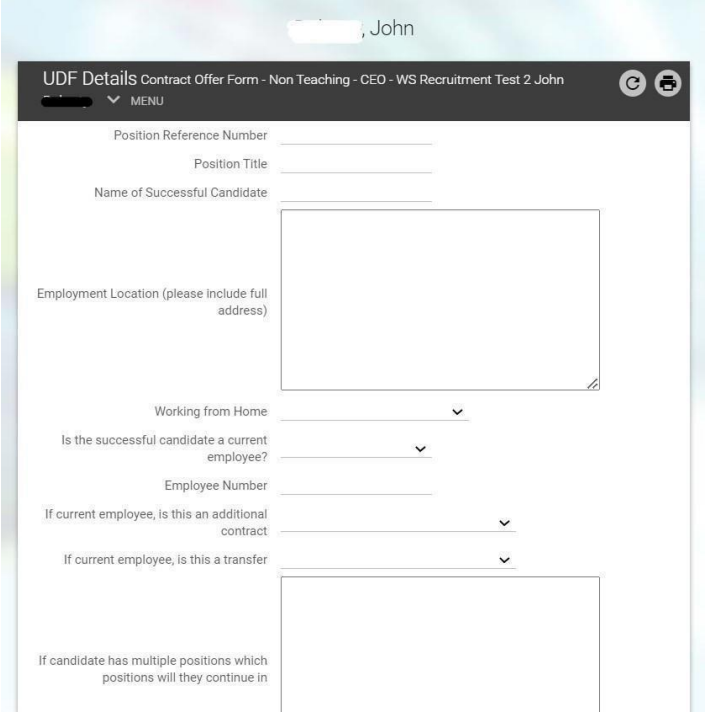
Once the applicant(s) have been progressed to offer, under the **Offer** links, please select **Complete offer form**:



You should then search for the relevant applicant's name and select either **Contract Offer Form – Teaching** or **Contract Offer Form – Non Teaching** (as applicable):

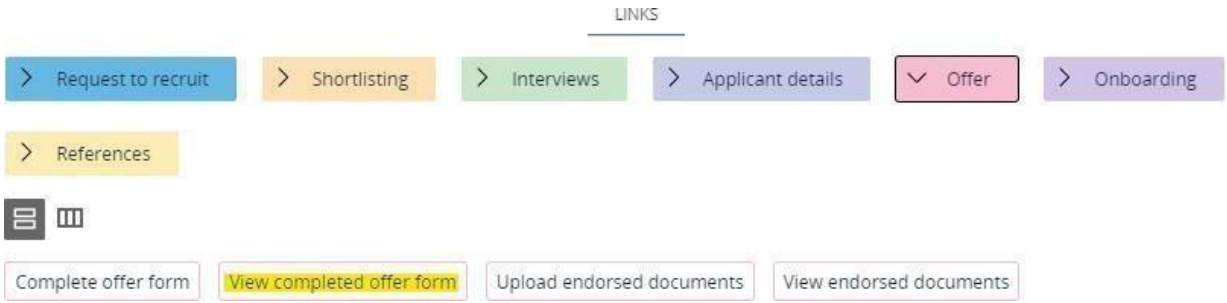


You should then ensure all fields on the contract offer form are completed. The Workforce Resourcing Team require all information on this form to be able to start the offer process and begin the pre-employment checks.



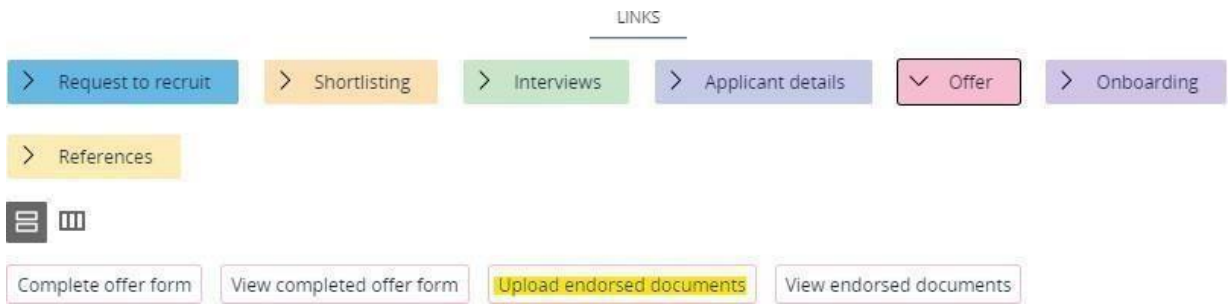
Once completed, select **Save**. This will then notify the Workforce Resourcing Team to activate onboarding for the applicant and begin the pre-employment check process.

If you wish to view your completed offer form, you can view this by selecting the link **View completed offer form:**



If you have copies of the successful applicant's qualifications and eligibility to work in the UK from their interview, these should be uploaded at this stage via the link **Upload endorsed documents**. UK legislation on right to work checks now requires a member of the panel to view and endorse all original documentation from the applicant. If you have not obtained this at interview, you should arrange to meet with the successful

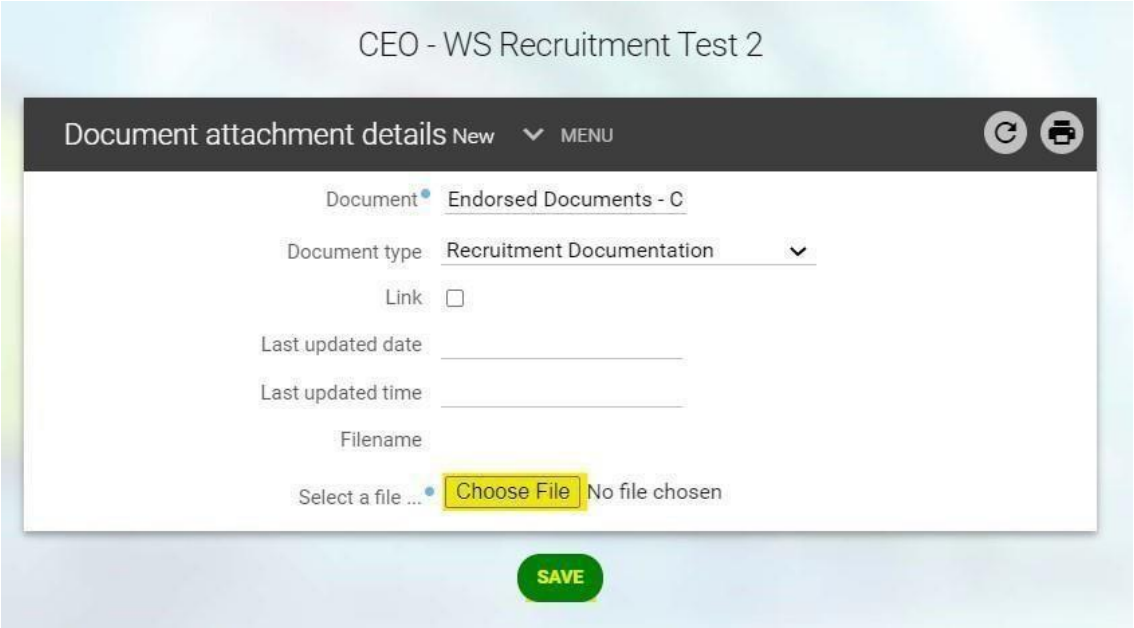
applicant to get this documentation and upload this once received. To upload this, go to the menu and select **Upload endorsed documents**:



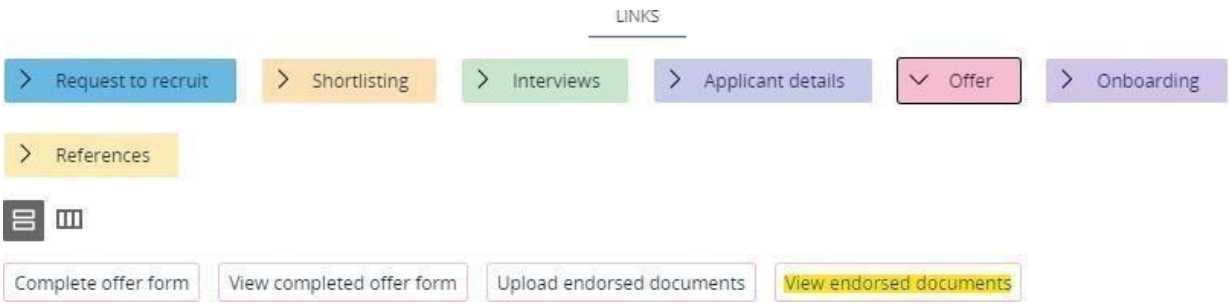
Within the **Document** field you should enter the document name is the following format: **Endorsed Documents - Applicants Name**

The **Document type** field should always be updated to the **Recruitment documentation** dropdown.

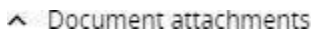
You should then select **Choose file** and then search for and select the relevant saved file. Once updated, you should select **Save**:



You then can view any endorsed documents that have been uploaded by selecting the link **View endorsed documents**:



Once you have searched for and selected the relevant applicant, any uploaded documents will then appear under the **Document Attachments** section on the left-hand panel. You can then view/download the documents from here:



Additional Recruitment

If other vacancies arise and you would like to fill these with suitable applicants from the ongoing recruitment campaign, you can do so by completing the Additional Recruitment Request Form and returning as follows*:

- If this due to a promotion or resignation this will be a backfill and the form should therefore be returned to: ESC-RecruitmentTeam@northlan.gov.uk
- If this is due to additional funding, maternity or sickness, you should return this to your HR Business Partner to progress.

**For casual/sessional recruitment, there is no need to complete the Additional Recruitment Request Form. Instead, you should complete a Contract Offer form for the applicant(s) on iTrent recruitment and ensure this indicates they are to be offered a casual or sessional role on the Position Title field.*

For any additional appointments, please ensure you move them to the **Progress to Offer** stage and complete the relevant contract offer form/upload their endorsed documents. This will then allow the Workforce Resourcing Team to progress accordingly.

Onboarding

The Workforce Resourcing Team will then activate the onboarding process and carry out any other relevant pre-employment checks. As a Recruiting Manager or Panel Member, you are not required to do anything further until you are contacted by a member of the Workforce Resourcing Team. This may include requests to verify a reference or to review an applicant's Health Questionnaire (if applicable). Once all pre- employment checks have been completed, you will be contacted to advise a start date can now be agreed with the successful applicant and to confirm this with the Workforce Resourcing Team.

Please note you must not agree a start date with the successful applicant until a member of the Workforce Resourcing Team contacts you to advise all necessary pre-employment checks have been completed.

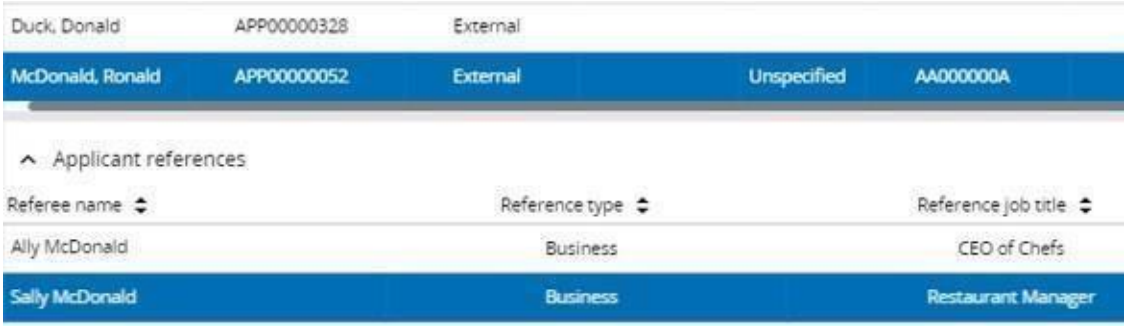
You can check the progress of the successful applicants onboarding under the **Onboarding** section, where you can view the onboarding checklist progress and the applicants' pre-employment checks at the highlighted links:

References

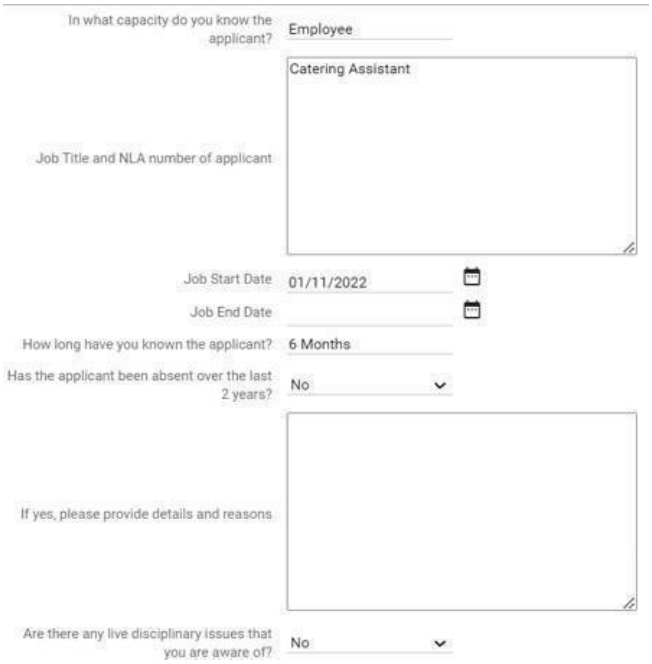
Viewing a completed reference

You will be notified by email when a reference has been completed for an applicant. When this email has been received, you should review the completed reference using the link **View completed reference form**:

You should then search for and select the relevant applicant (the applicant's name will be include in the email notification). This will then display results for all referees provided by the selected applicant. To check the completed reference, you should select the relevant referee from the list of results:



You will now be able to view the completed reference:



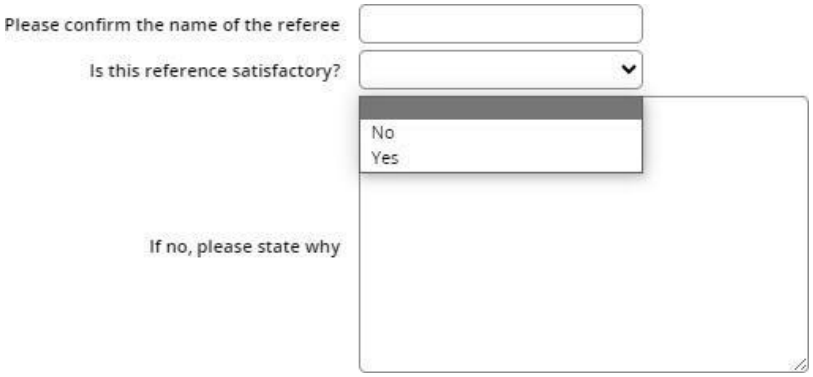
Verifying a completed reference

You should then review the reference and determine whether this is satisfactory. To do this you should select the link **Complete referee satisfactory form** from the menu:

From the available list, please select **Reference check**:

Here you should state the name of the referee you are completing the verification for. You should then confirm whether the completed reference is satisfactory.

If the reference is not satisfactory, you must include the reason for this.



This process should be repeated for all completed references.

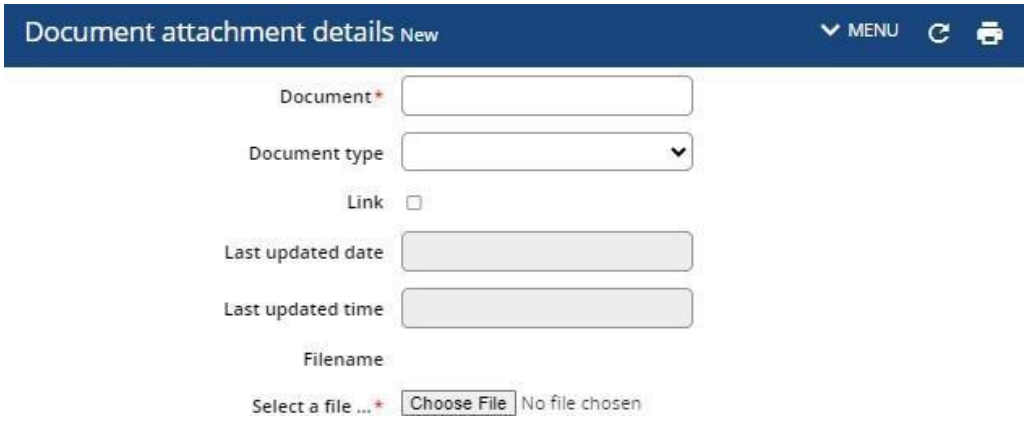
Other references

There may be examples of other completed references, such as verbal references or confirmation of employment letters.

Verbal references

If your service undertakes verbal references, the relevant form should be uploaded via the highlighted link below.

Selecting this link will prompt you to search for the relevant applicant. Once selected, you should then select the name of the relevant referee from the list of results. The page will then appear as follows:



The **Document** field should be updated according to the following format: **Reference – REQ Number – Company Name**

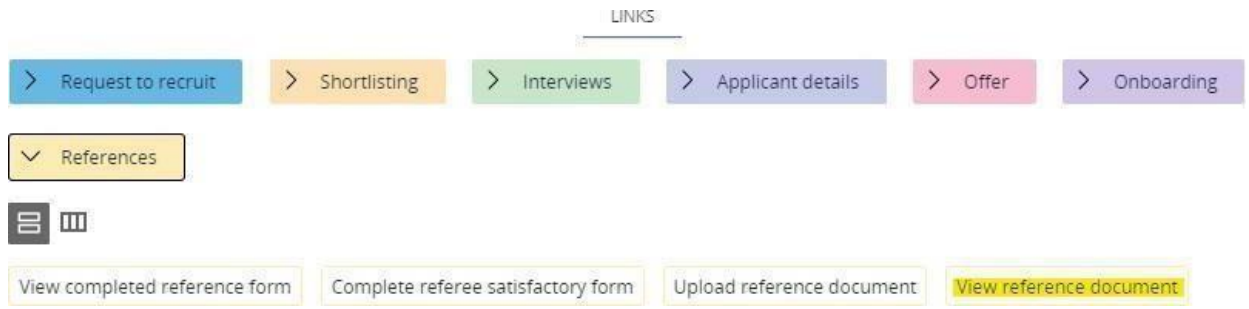
Document type should always be “Upload to Web Recruitment”.

At **Select a file** you should then search for and select the relevant verbal reference from your file explorer. Selecting **Save** will then upload the document to iTrent.

Confirmation of employment

Some organisations do not provide detailed references, instead providing only the job title of the applicant and their employment dates. You will be emailed by a member of

the Workforce Resourcing team to confirm when one of these references have been returned and this will be available to view at the link **View reference document**:



Once viewed, you should then go back to the link **Complete referee satisfactory form** and verify the reference.

Confirming a Start Date

Once all pre-employment checks have been completed, you will be notified of this by email and asked to confirm a suitable start date. You should then contact the successful applicant(s) to confirm a mutually agreeable start date and confirm this by email with your Recruitment Advisor. Please ensure you also include the following:

- Reporting details for their first day (location/person/time)
- If the position has a rotating work pattern (for example, over 4 weeks), you must confirm which day and week of the pattern the agreed start date will be (for example, week 2 day 3)

Please allow for a minimum of 7 days' notice of the start date to ensure the Workforce Resourcing team can process this before the employee commences their new role.

The Recruitment Team will then confirm this with the applicant(s) in an email and transfer the applicant to the position (and an employee number will be generated for new employees to NLC). You will then have access to the employee on your myTeam account. An email will be issued to you to confirm this and their employee number which will allow you to arrange IT access etc. mySelf access will automatically be provided. However, should your new staff member require access to core iTrent and/or myTeam for their new role – please complete the relevant security forms on www.myNL.co.uk and send these to the ESC People Helpdesk at esc-helpdeskteam@northlan.gov.uk

Further Information

If you require further support –

For staff live on myNL Portal - Please raise a People Helpdesk General Enquiry request form.

For staff not yet live - Please email ESC-HelpDeskTeam@northlan.gov.uk

Glossary

Requisition - Advert requests are now known as Requisitions.

Applicant – People who apply for requisitions are now known as applicants.

Published - Means the requisition has been published and applicants can apply.

REQ Number – This is the new job reference number.

APP Number – This is the applicant reference number.