

Processing Shortlisting Outcomes

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Processing Shortlisting Outcomes on the Online Recruitment System

After the shortlisting exercise has been completed, only the 'Shortlisting Final Order of Merit' form should be uploaded to the requisition. The process for uploading the interview document is the same as that of uploading/attaching documents to a requisition which can be found on page 32 of the [Creating a Requisition and Requisition Management guide](#).

Corporate based positions

The following processes for notifying candidates of shortlisting outcomes will be processed by the Corporate Recruiters.

School based positions

The following processes for notifying candidates of shortlisting outcomes will be processed by the School Hiring Manager (Principal)/Hiring Manager Assistant (nominee).

Rejecting a candidate

You will not want to progress candidates who have not met all essential criteria. If you have decided to set and use desirable criteria, you will also want to reject candidates who did not meet the applied desirable criteria.

You can reject a candidate from the main candidate list of the requisition or from their job submission page. The steps remain the same but are completed from different screens.

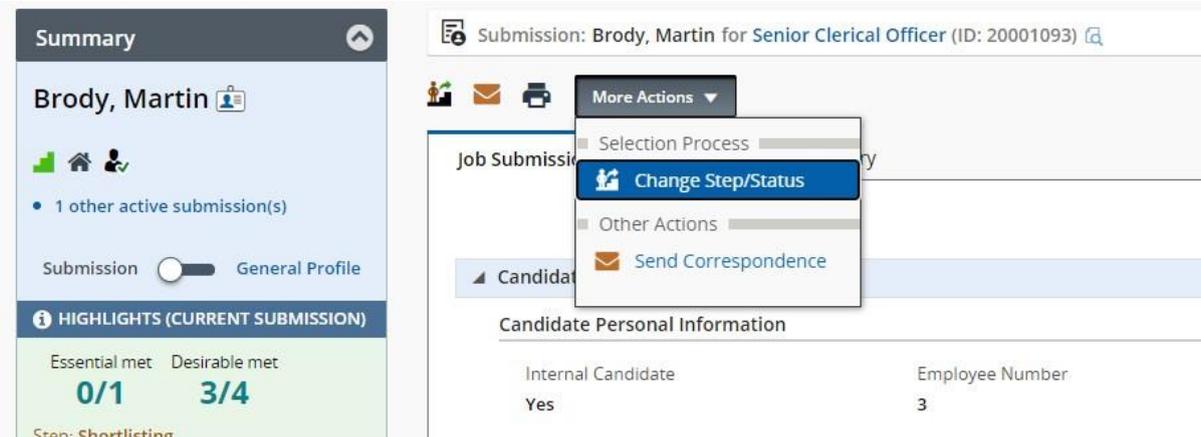
To reject a candidate from the main candidate list, select the **check box** in the first column. You can select several candidates to reject at one time:

<input type="checkbox"/>		Candidate				Step	Selection Step, Status	Essential
<input checked="" type="checkbox"/>		Brody, Martin (24644)				Shortlisting	Shortlisting - New	0 / 1

Click **More Actions** at the top of the page, scroll to and click on **Change Step/status**:

<input type="checkbox"/>		Candidate				Step	Selection Step, Status	Essential
<input checked="" type="checkbox"/>		Brody, Martin (24644)				Shortlisting	Shortlisting - New	0 / 1
<input type="checkbox"/>						Shortlisting	Shortlisting - New	1 / 1
<input type="checkbox"/>						Shortlisting	Shortlisting - New	1 / 1
<input type="checkbox"/>		Pond, Amy (24662)				Shortlisting	Shortlisting - New	0 / 1

To reject a candidate from their job submission page, click **More Actions** at the top of the job submission, scroll to and click on **Change Step/status**.



The following 'Change Step and Status' pop up is displayed:

x
Change Step and Status

Candidate Name
Brody, Martin
Requisition Title
Senior Clerical Officer (20001093)

Currently in

Step Shortlisting	Status New
----------------------	---------------

➔

Change to

Step Shortlisting	Status Progress to 1st Stage*
----------------------	----------------------------------

* = completes the step

Comments

Please enter comments here

Select Other Action

Send Correspondence

Cancel
Apply and Continue
Apply and Close

Under the **Change to** heading click to display the status drop down:

Change to	
Step	Status
Shortlisting	<div style="border: 1px solid black; padding: 5px;"><p>Progress to 1st Stage* ▼</p><p>Progress to 1st Stage*</p><p>DO NOT USE: Rejected - Not Eligible to work in UK</p><p>Rejected</p><p>On Hold</p><p>Candidate Withdrawn ▼</p></div>

Select the **Rejected** status. A **Details or Disposition** box will appear. Select the reason for rejection. These reasons will vary depending on what stage of the process the candidate is at.

Details or Disposition

Does not meet the required criteria for the role

Under the **Select Other Action** sub heading, Select to **Send Correspondence**.

Select Other Action

Send Correspondence

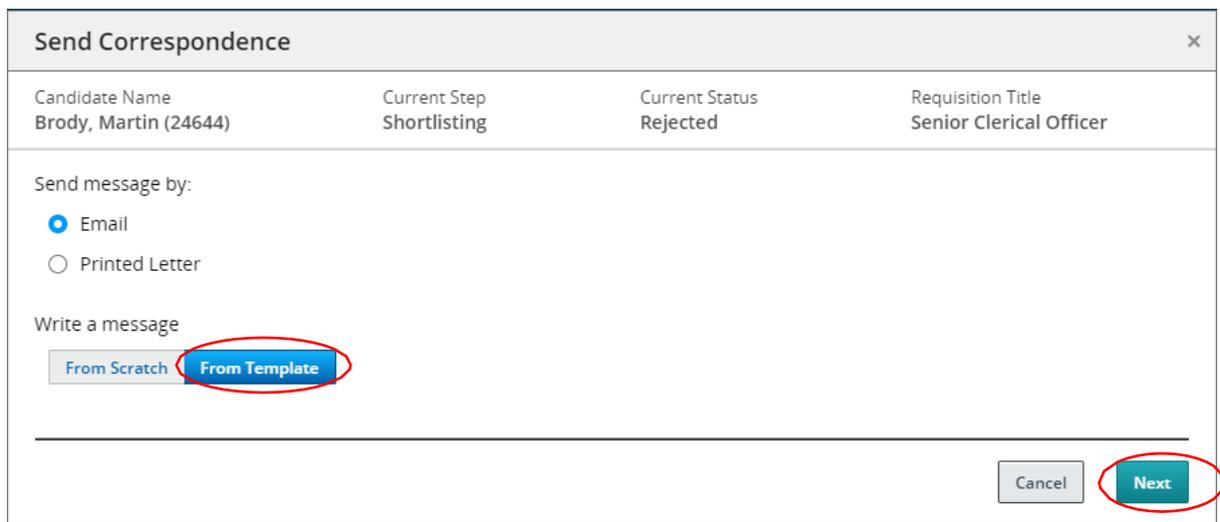
Add comments as necessary, however, these comments are not mandatory. Click the **Apply and Proceed to Next Action** button.

The 'Send Correspondence' pop up will appear:

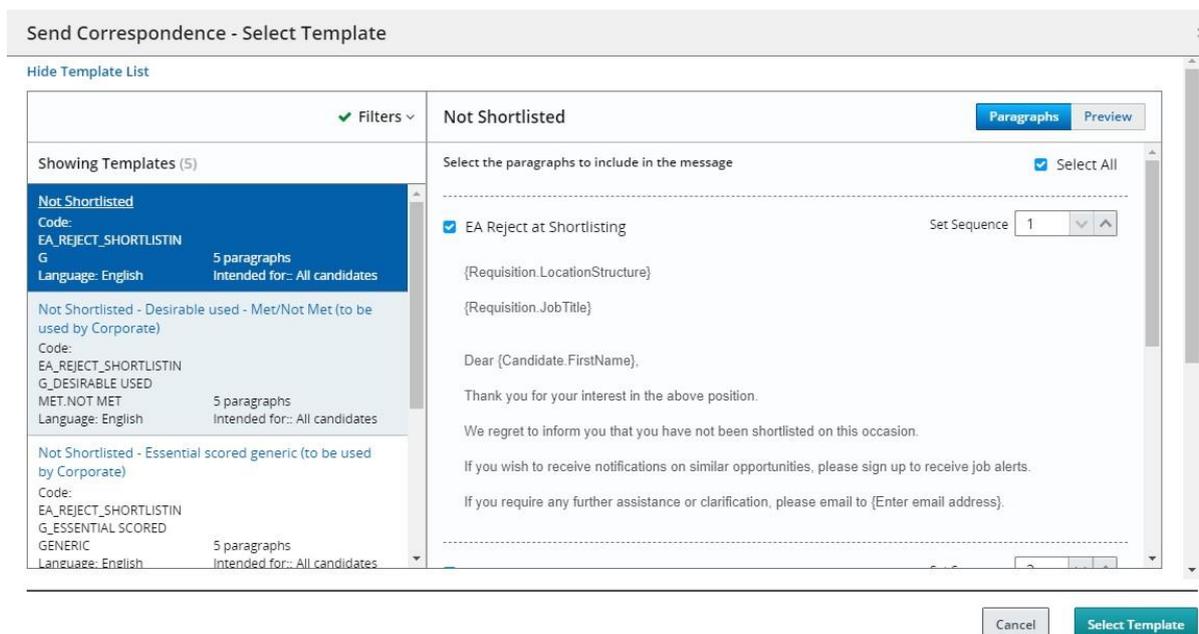
You can choose to send correspondence by 'Email' or by 'Printed Letter'. It is recommended that you send correspondence via **Email** as the details of this will then be stored in the candidate history for that role and can be accessed later if necessary.

You can select to write a message from scratch or from a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

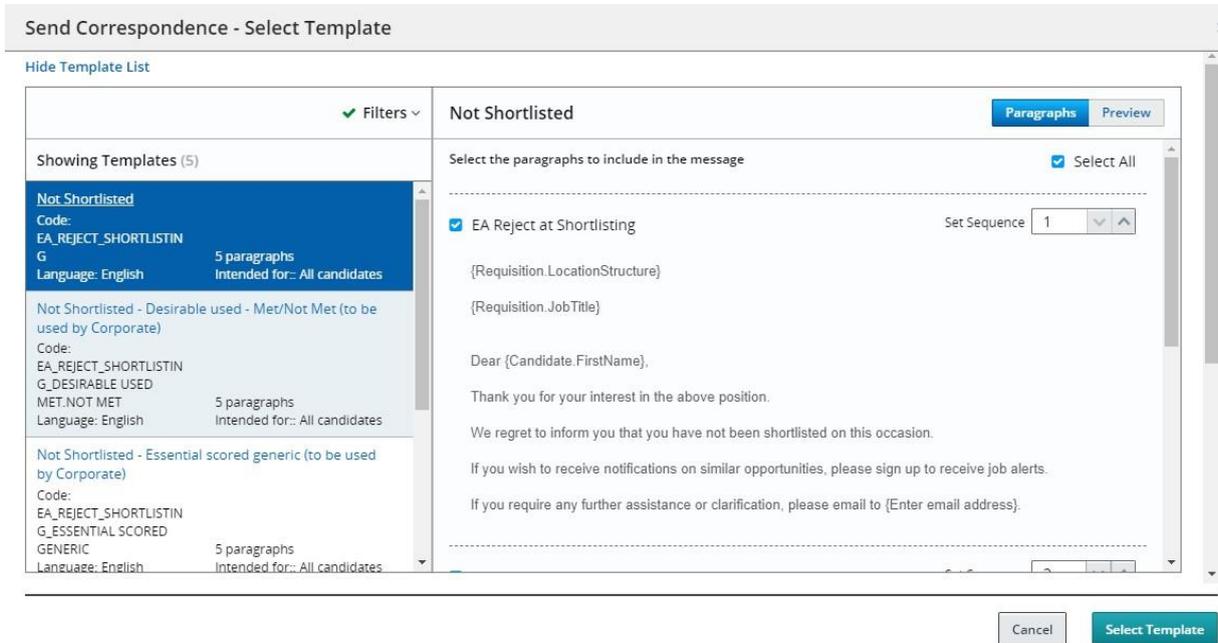
To use a template, ensure the **From Template** button is highlighted in blue and click **Next**.



The following pop up will appear:



Click on the template you wish to use. You will notice that this will be then be highlighted in a dark shade of blue.

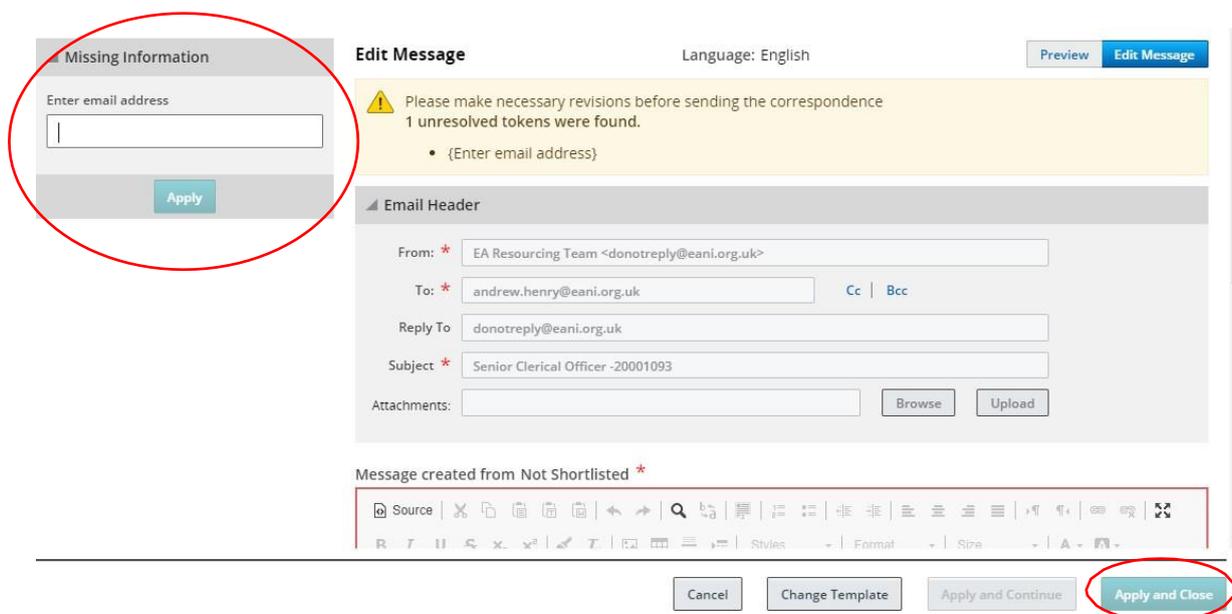


You will be now able to review the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

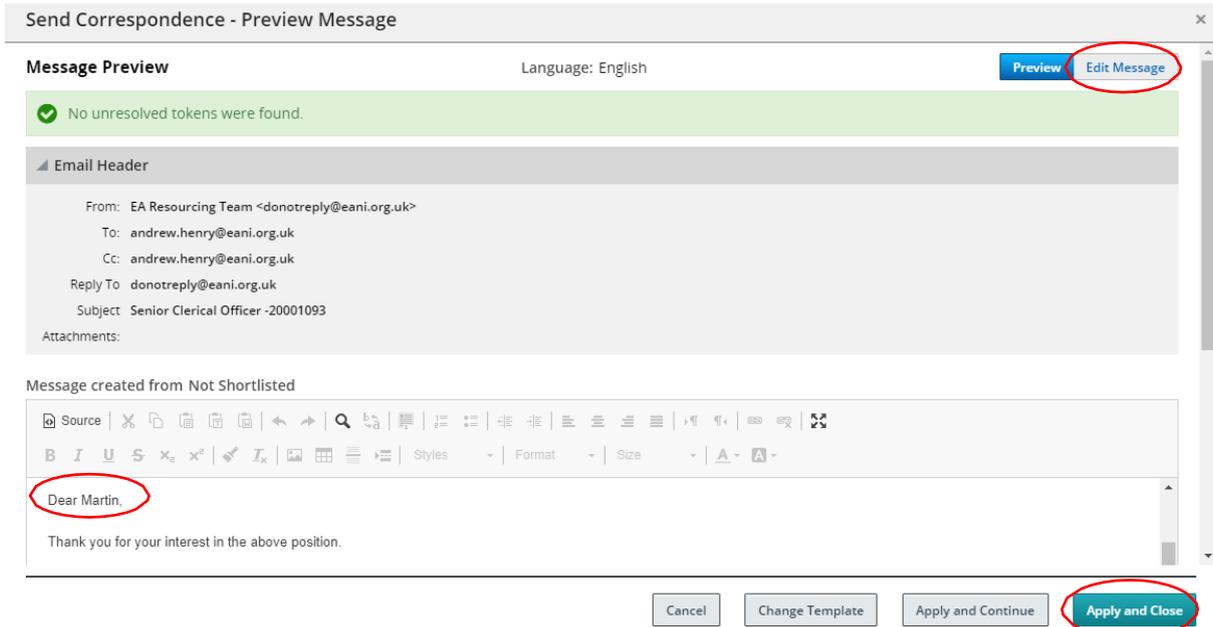
Click the **Select template** button and the following pop up will display:

Enter any relevant missing information required to populate on the letter and click **Apply**.



When the missing information has been resolved. You will now be able to preview your letter. Text in curly brackets will now be populated in the correspondence received by the candidate.

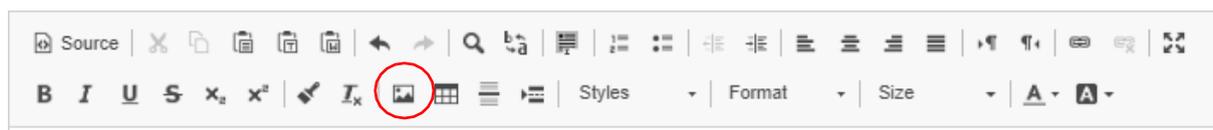
If you need to edit a template correspondence, you can do so by clicking on the **Edit Message** at the top of the screen.



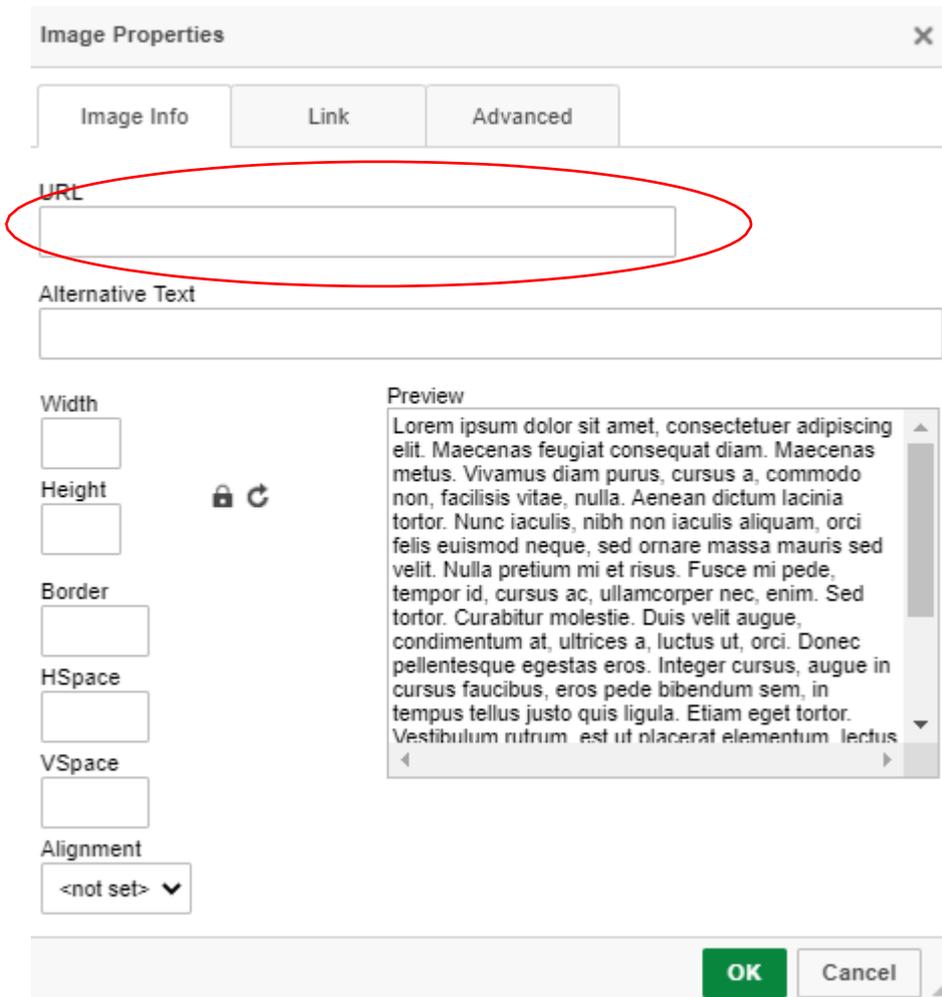
You may wish to add attachments, insert a school logo or edit the email address the correspondence is being issued from.

To insert a school logo, you will need to click **Edit Message** to unlock the edit toolbar.

Click on the **Image Icon**.



The following pop up will be displayed.



You will then need to locate the school logo from your school website. Right click on the image, and then click on **copy image address**. Paste the image address into the **URL** field.

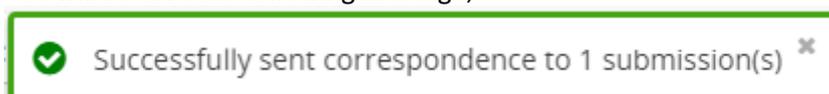
Click **OK** and the school logo will appear in your message template.

You may wish to remove the EA Logo.

Please note that the default email address is the **EA Resourcing Team**.

To issue this correspondence, click **Apply and Close**.

You will receive the following message;



Rejecting candidates in bulk

Alternatively, you can choose to reject multiple candidates. To perform this action, you will need to do this from the submissions list and the candidates that you have selected must be in the same step and status, for example, **shortlisting step and status - new**. Select the **check box** in the first column for those candidates that you are rejecting.

Click **More Actions** at the top of the page, from the drop down menu, click on **Change Step/status**.



<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Candidate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Step	Selection Step, Status	Essential ▲
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brody, Martin (24644)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shortlisting	Shortlisting - New	0 / 1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pond, Amy (24662)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shortlisting	Shortlisting - New	0 / 1

As outlined previously, select the reason for rejection. An **additional Details or Dispositions** box will appear. Select the reason for rejection. These reasons will vary depending on what stage of the process the candidate is at.

Under the **Select Other Action** sub heading, Select to **Send Correspondence**. Click **Apply and Proceed to Next Action**.

You can choose to send correspondence by 'Email' or by 'Printed Letter'. It is recommended that you send correspondence via **Email** as the details of this will then be stored in the candidate history for that role and can be accessed later.

You can select to write a message from scratch or from a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To use a template, ensure the **From Template** button is highlighted in blue and click **Next**.

The send correspondence pop up is displayed with a selection of template letters. Click on the template you wish to use.

As before, you will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

Click on the **Select Template** button at the bottom of the page.

Review the template and should you wish to make any amendments, these will need to be done at this point.

Bulk Action - Send Correspondence to 2 Submissions - Preview Message

Language: English

Edit Message Preview Edit Message

Email Header

From: * EA Resourcing Team <donotreply@eani.org.uk>

To: * {CandidateHeader.Email} Cc | Bcc

Reply To: donotreply@eani.org.uk

Subject * {Requisition.JobTitle}-{RequisitionHeader.ContestNumber}

Attachments: Browse Upload

Message created from Not Shortlisted *

Source | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Link | Unlink | Text Size | Styles | Format | Size | Font Color | Font Style

{Other.CompanyLogos1}

{Requisition.LocationStructure}

Cancel Change Template Apply and Continue **Apply and Close**

Click **Apply and Close**.

A send correspondence pop up will be displayed and this will highlight any errors or missing information which need to be completed on your template letters. Click **Review All**.

Bulk Action - Send Correspondence

Warning

2 of 2 submissions contains errors and will not be sent. Would you like to continue?

Cancel **Review All**

The names of the candidates that you have selected to send correspondence to in bulk will now appear on the left side of the screen.

Bulk Action - Send Correspondence to 2 Submissions - Preview Message

There are 2 submissions containing errors (2 in total)

Hide selected submissions

Please resolve following submission errors

Submissions	Sort by
<ul style="list-style-type: none"> Amy Pond ID 31122 Language English 1 Errors Martin Brody ID 31123 Language English 1 Errors 	

Amy Pond ID:31122 Validate

Missing Information

Enter email address

Apply

Edit Message Language: English Preview Edit Message

Please make necessary revisions before sending the correspondence
1 unresolved tokens were found.

{Enter email address}

Email Header

From: * EA Resourcing Team <donotreply@eani.org.uk>

To: * terri.watson@eani.org.uk Cc | Bcc

Reply To: donotreply@eani.org.uk

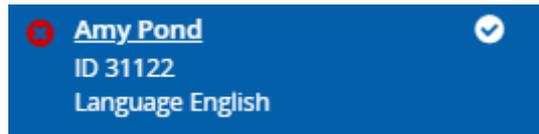
Subject * Senior Clerical Officer -20001093

Cancel Back Apply and Continue **Apply and Close**

You will notice that there are a number of errors against each candidate that need to be resolved.

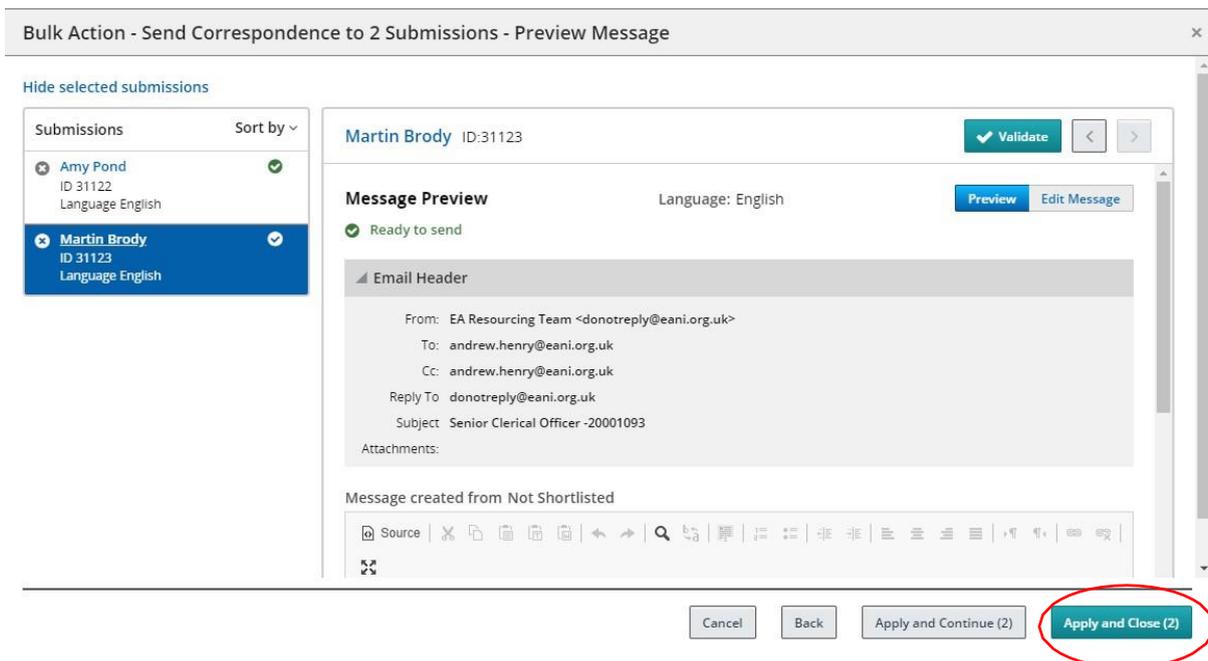
These errors can be resolved by completing the missing information tab. Complete with the required information and click the **Apply** button.

This information has now been populated on the first candidate correspondence; you will notice that there is now a tick beside the candidate name to confirm that all errors have been resolved.



To resolve the errors on the remaining candidates, click on their name, they will now highlighted in a dark shade of blue. Click **Apply** to complete the required information. You will need to continue with this process for all candidate that you have selected.

To preview each correspondence you can do this by clicking on the candidate's name.



Click the **Apply and Close** button to issue the correspondence.

*Note the number in brackets in the **Apply and Close** button, this highlights the total number of correspondence being issued.*

The following message will display;



To view the correspondence that you have just sent, click on the candidate name to access their profile and select the **History** tab.

Submission: Pond, Amy for Senior Clerical Officer (ID: 20001093) [🔗](#)

More Actions ▾

Job Submission Interviews **History**

Show history for Current submission - Senior Clerical Officer (... ▾)

Modify Categories 8 out of 11 event categories selected Sort By ▾

Senior Clerical Officer (ID: 20001093)			
Date	Events	Details/Comments	By
29-Jul-2020, 3:11:41 PM	Correspondence sent	Senior Clerical Officer -20001093 🔗	Hiring Manager (Hiring Manager)

The candidate history has been logged. Click on the blue hyperlink under the **Details/Comments** column to view correspondence received by the candidate.

Correspondence Preview ✕



Northern Ireland>Down>Dundonald>Dundonald Office

Senior Clerical Officer

Dear Amy,

Thank you for your interest in the above position.

We regret to inform you that you have not been shortlisted on this occasion.

If you wish to receive notifications on similar opportunities, please sign up to receive job alerts.

If you require any further assistance or clarification, please email to ea@recruitment.org.uk.

Yours sincerely

EA Corporate Resourcing Team

Do not reply to this email as this is an automated notification.

Please note that you can update your account preferences at anytime by accessing the [My Account](#) page.

Close

You will notice that the fields previously in curly brackets were populated in the correspondence received by the candidate.

When you are finished, click the **Close** button.

Progressing a candidate

You will want to progress candidates who have met all essential criteria and any desirable criteria that you have set and applied.

You can progress a candidate from the main candidate list of the requisition or from within their job submission page. The steps remain the same but are completed from different screens.

Tip: You can choose to schedule interviews/assessments either:

- One by one by selecting only one candidate at a time
- In bulk by selecting all candidates you are inviting to interview per interview date
- In bulk by selecting all candidates you are inviting to interview in total

If you select more than one candidate at a time to schedule an interview for, you **must** edit the invite letter for each candidate to update the date/time. This will be shown later in this user guide.

To progress a single candidate from the main candidate list select the **check box** in the first column next to the candidate you want to progress. You can select to progress multiple candidates at once.

Click **More Actions**, scroll to and click on **Change Step/status**:

<input type="checkbox"/>		Candidate			Step	Selection Step, Status	Essential
<input checked="" type="checkbox"/>		Carter, Peggy (24664)			Shortlisting	Shortlisting - New	1 / 1
<input type="checkbox"/>		Danvers, Carol (24629)			Shortlisting	Shortlisting - New	1 / 1
<input type="checkbox"/>		Pond, Amy (24662)			Shortlisting	Shortlisting - Rejected	0 / 1
<input type="checkbox"/>		Brody, Martin (24644)			Shortlisting	Shortlisting - Rejected	0 / 1

To progress a candidate from the job submission page, click **More Actions** at the top of the candidate job submission, scroll to and click on **Change Step/status**.

NB: Should you progress a candidate from their job submission page, you can only progress one candidate at a time as opposed to completing this task for several candidates at once.

Summary

Carter, Peggy

1 other active submission(s)

Submission General Profile

HIGHLIGHTS (CURRENT SUBMISSION)

Essential met: 1/1 Desirable met: 2/4

Step: Shortlisting
Status: New
Source: Career Section
Date of Application: 21-Jul-2020

Submission: Carter, Peggy for Senior Clerical Officer (ID: 20001093)

More Actions

- Selection Process
- Change Step/Status**
- Other Actions
- Send Correspondence

Candidate Personal Information

Internal Candidate	Employee Number
Yes	2
Surname	National Insurance Number
Carter	SA137309B

The following 'Change Step and Status' pop up is displayed:

Change Step and Status

Candidate Name: Carter, Peggy Requisition Title: Senior Clerical Officer (20001093)

Currently in	Change to
Step: Shortlisting Status: New	Step: Shortlisting Status: Progress to 1st Stage*

* = completes the step

Comments:

Select Other Action: Send Correspondence

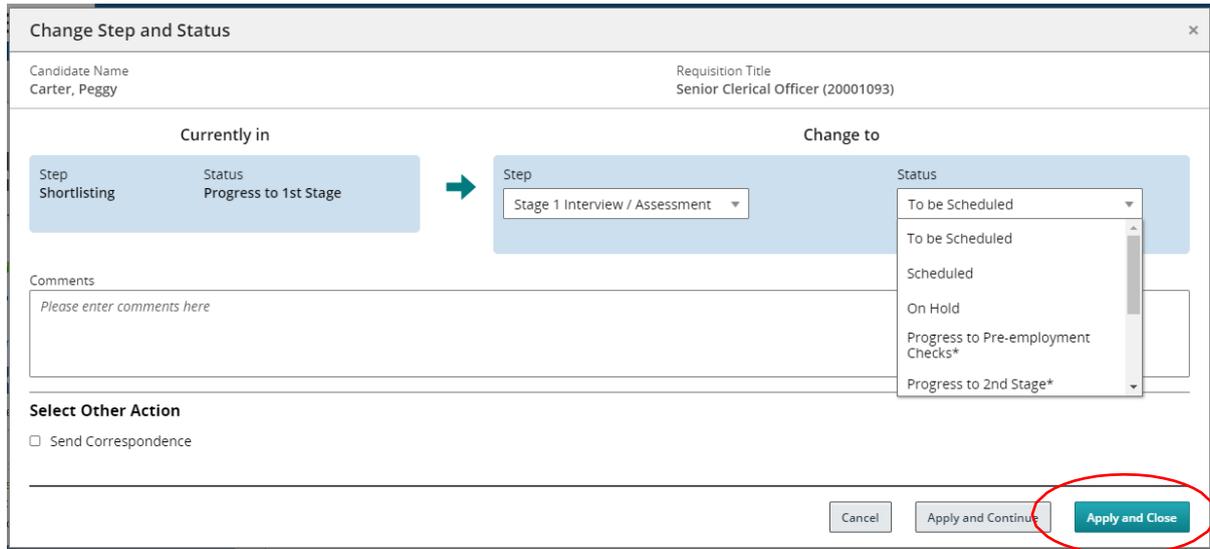
Click to display the drop down on the **Change to** status heading.

Change to

Step: Shortlisting	Status: Progress to 1st Stage* <ul style="list-style-type: none"> Progress to 1st Stage* DO NOT USE: Rejected - Not Eligible to work in UK Rejected On Hold Candidate Withdrawn
--------------------	---

Ensure **Progress to 1st Stage*** is selected and click **Apply and Continue**. This will move the candidate to the next step of the workflow – **Stage 1 Interview/Assessment**.

The 'Change Step and Status' pop up page will reflect this new step and will have options for the New Status of the candidates:



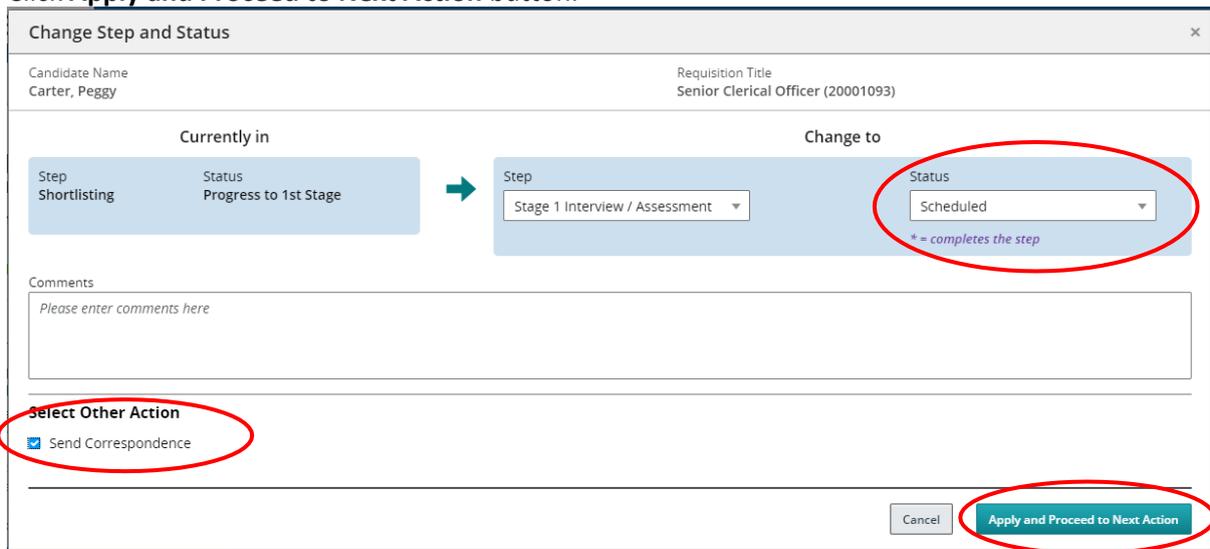
To schedule your interviews later, select **To be Scheduled** and click **Apply and Close**.

You will be returned to the requisition candidate list where you will notice that the candidates have been updated to the new step and status:

Alternatively, if you wish to proceed to schedule your interviews select **Scheduled** on the New Status list:

Under the **Select Other Action** sub heading, tick the checkbox to **Send Correspondence**:

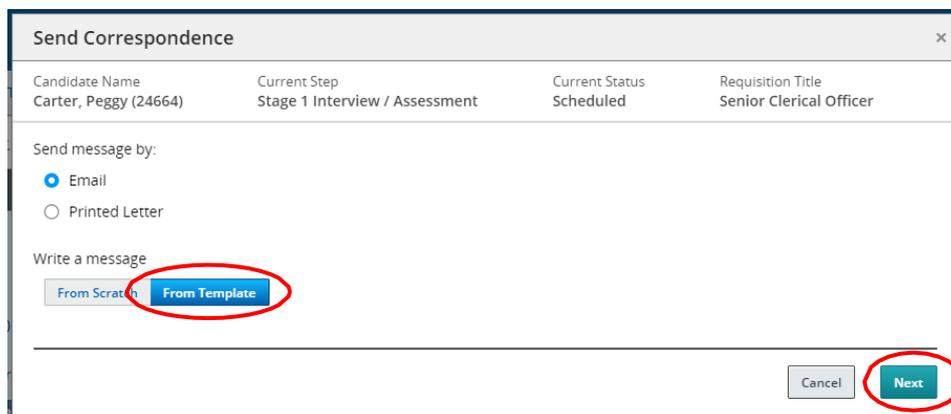
Click **Apply and Proceed to Next Action** button.



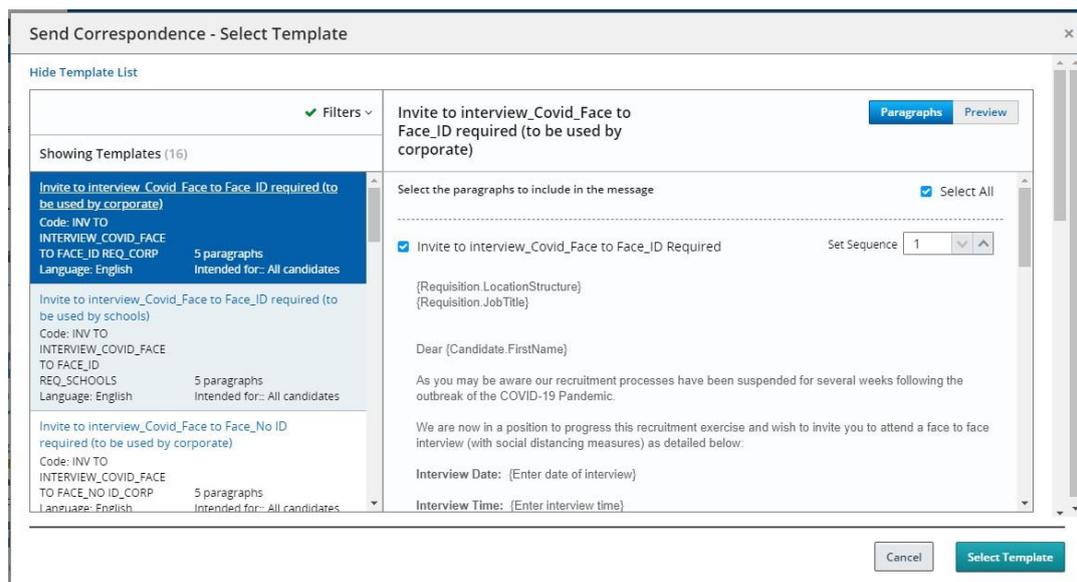
The 'Send Correspondence' pop up will display. You can choose to send correspondence by Email or by Printed Letter by changing the drop down value in the first field. It is recommended that you send correspondence via **Email** as the details of this will then be stored in the candidate history for that role and can be accessed later if necessary.

You can create an Invite to Interview/Assessment from scratch or from a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To use a template, ensure the **From Template** button is highlighted in blue and click **Next**.



The following pop up will appear:

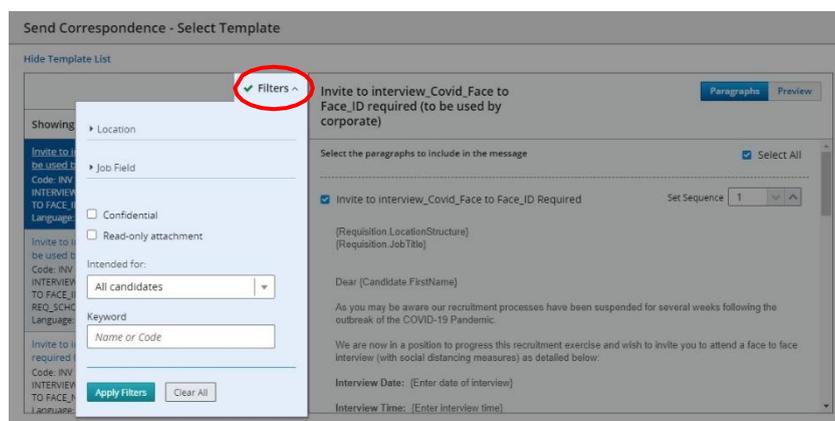


The 'Template Selector' pop up will appear. Click on the template you wish to use, you will notice that this will be highlighted in a dark shade of blue.

You will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

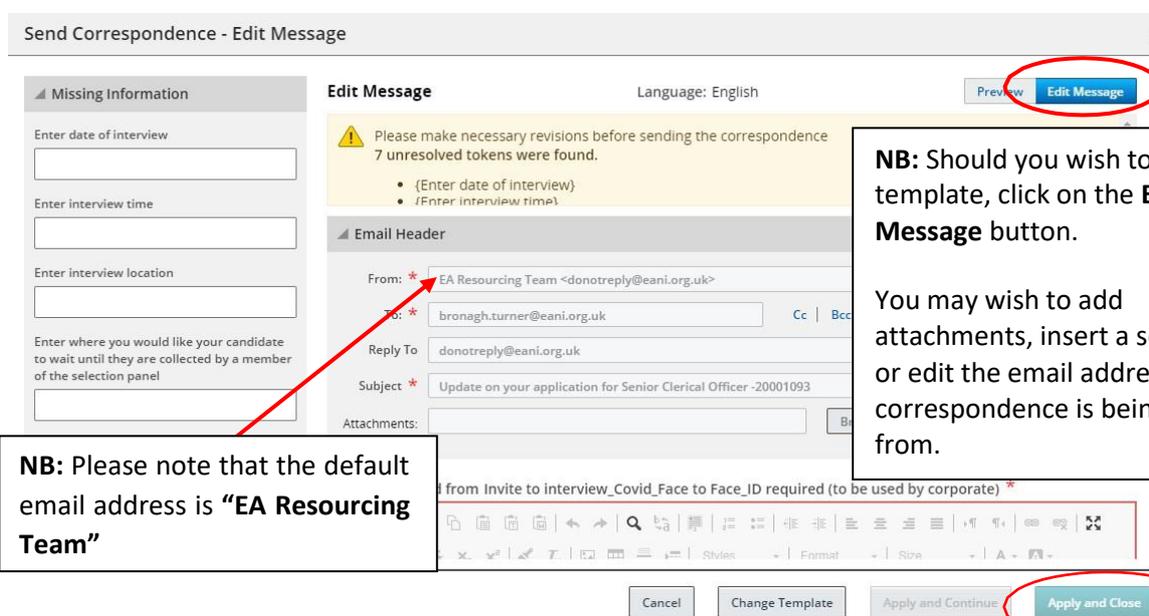
All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required by clicking the checkbox next to the paragraph title.

You can use the filters to assist you with your search.



Click the **select template** button to continue.

A warning message will now be displayed to advise that there is missing information that needs to be completed on the interview letters. This missing information will be the actual interview details. Enter this information on the missing information pane and click **Apply** beneath the missing information fields to update the template.



NB: Please note that the default email address is “EA Resourcing Team”

NB: Should you wish to edit the template, click on the **Edit Message** button.

You may wish to add attachments, insert a school logo or edit the email address the correspondence is being issued from.

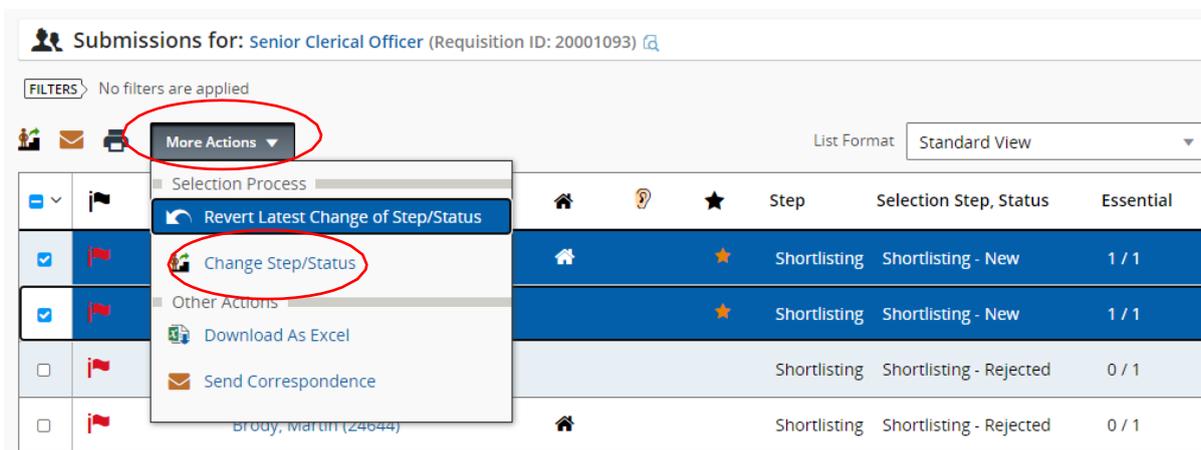
Review the template letter to ensure the text previously in curly brackets has now been populated with the information you provided. Click **Apply and Close** to issue the correspondence.

Sending Interview correspondence to more than one candidate at a time to interview/assessment stage

If you are selecting several candidates to invite to interview at one time. From the submission list, Select the **check box** in the first column for those candidates that you are inviting to interview.

<input type="checkbox"/>		Candidate				Step	Selection Step, Status	Essential
<input checked="" type="checkbox"/>		Carter, Peggy (24664)				Shortlisting	Shortlisting - New	1 / 1
<input checked="" type="checkbox"/>		Danvers, Carol (24629)				Shortlisting	Shortlisting - New	1 / 1

Click **More Actions**, from the drop down, click on **Change Step/status**:



Submissions for: Senior Clerical Officer (Requisition ID: 20001093)

FILTERS No filters are applied

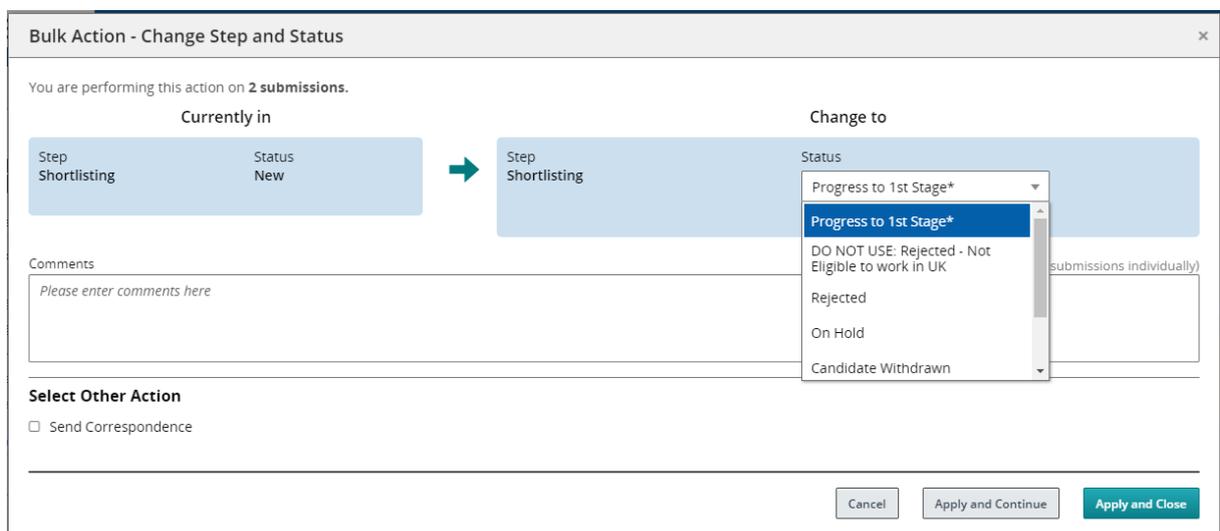
More Actions

Selection Process

- Revert Latest Change of Step/Status
- Change Step/Status**
- Other Actions
 - Download As Excel
 - Send Correspondence

<input type="checkbox"/>						Step	Selection Step, Status	Essential
<input checked="" type="checkbox"/>						Shortlisting	Shortlisting - New	1 / 1
<input checked="" type="checkbox"/>						Shortlisting	Shortlisting - New	1 / 1
<input type="checkbox"/>						Shortlisting	Shortlisting - Rejected	0 / 1
<input type="checkbox"/>		Brody, Martin (24644)				Shortlisting	Shortlisting - Rejected	0 / 1

Click to display the drop down on the **change to** Status heading.



Bulk Action - Change Step and Status

You are performing this action on 2 submissions.

Currently in

Step Shortlisting Status New

Change to

Step Shortlisting Status

Progress to 1st Stage*

DO NOT USE: Rejected - Not Eligible to work in UK

Rejected

On Hold

Candidate Withdrawn

Comments

Please enter comments here

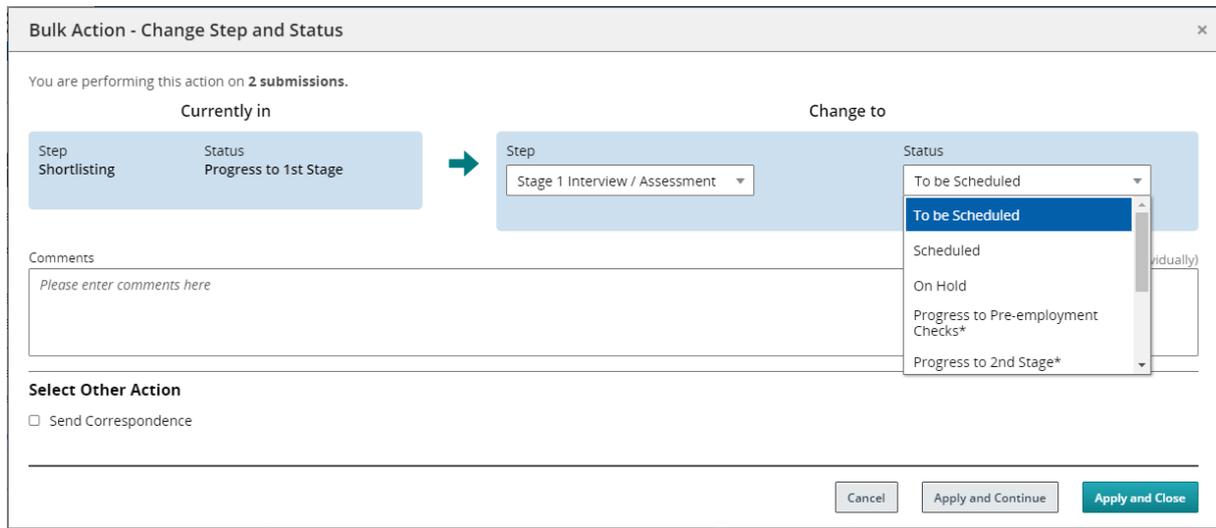
Select Other Action

Send Correspondence

Cancel Apply and Continue Apply and Close

Ensure **Progress to 1st Stage*** is selected and click **Apply and Continue**. This will move the candidate to the next step of the workflow – **Stage 1 Interview/Assessment**.

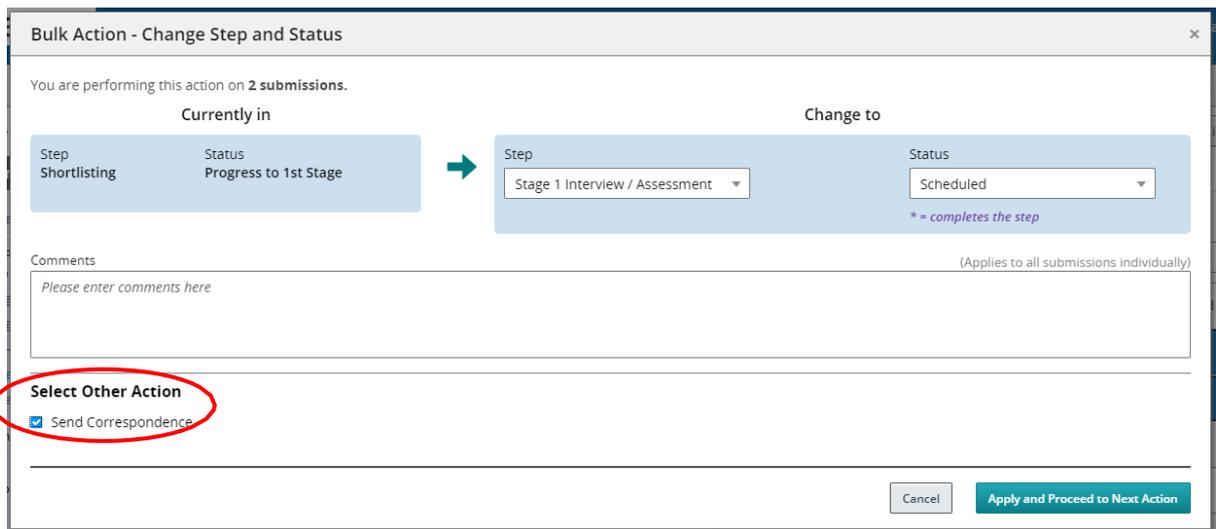
The pop up will reflect this new step and will have options for the New Status



To schedule your interviews later, select **To be Scheduled** and click **Apply and Close**.

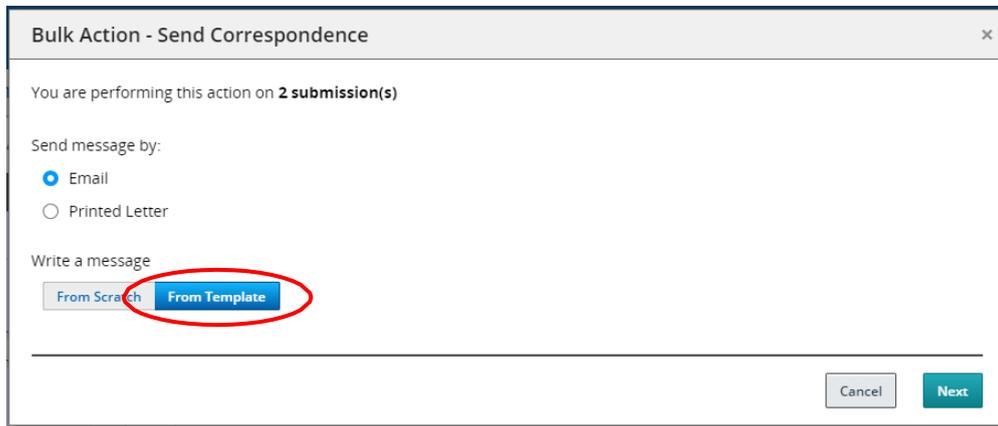
Alternatively, if you wish to proceed to schedule your interviews select **Scheduled** on the New Status list.

Under the **Select Other Action** sub heading, tick the checkbox to **Send Correspondence**:



Click **Apply and Proceed to Next Action** button.

The ‘**Send Correspondence**’ pop up is displayed. You can choose to send correspondence by Email or by Printed Letter. **It is recommended that you send correspondence by Email.** Candidates have been advised that on completion of their application, all correspondence relating to their application will be sent via the email address they provided.

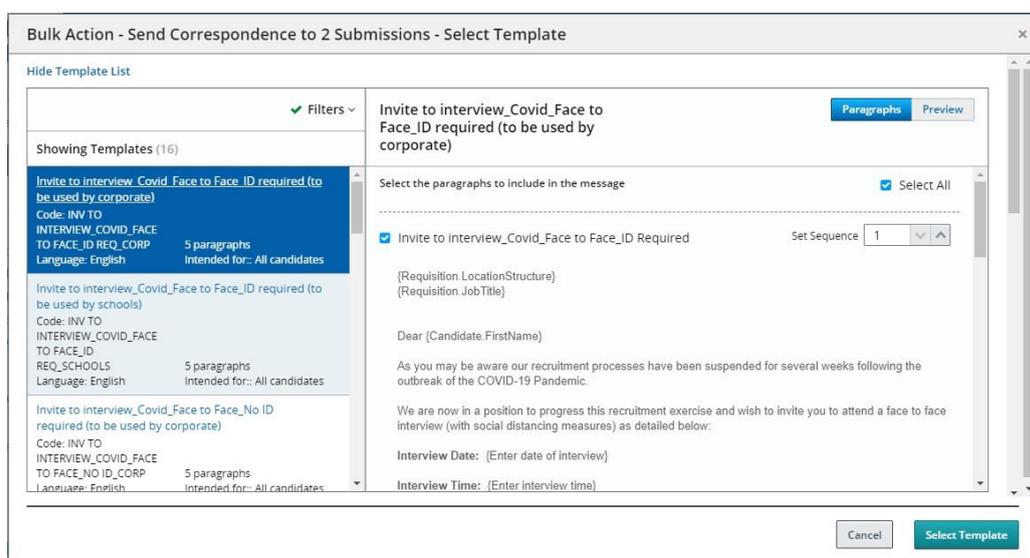


You can create an Invite to **Interview or Assessment** from scratch or from a template. Templates have been created in the system library for your ease; it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

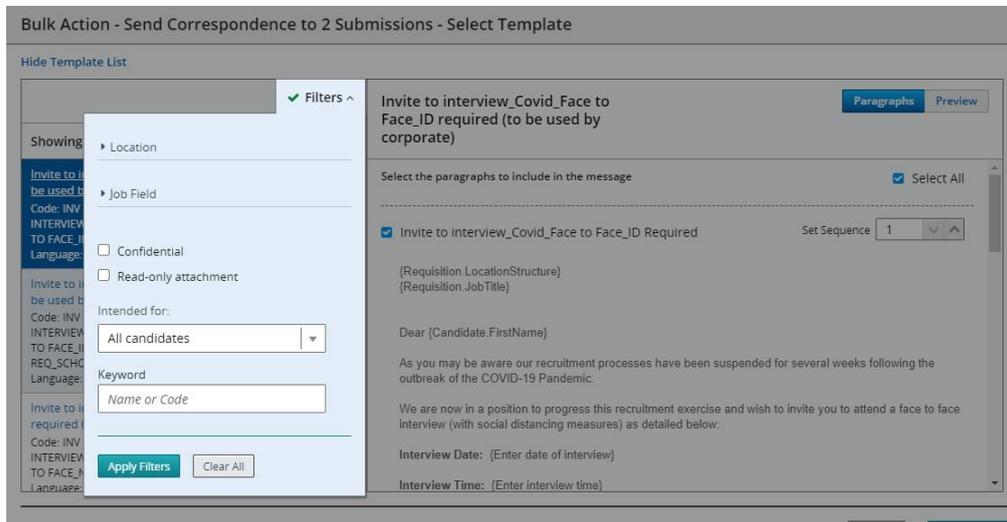
To access the library templates, click on the **templates** button and then click **next**.

The ‘Template Selector’ pop up will appear. Click on the template you wish to use, you will notice that this will be highlighted in a dark shade of blue.

You will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

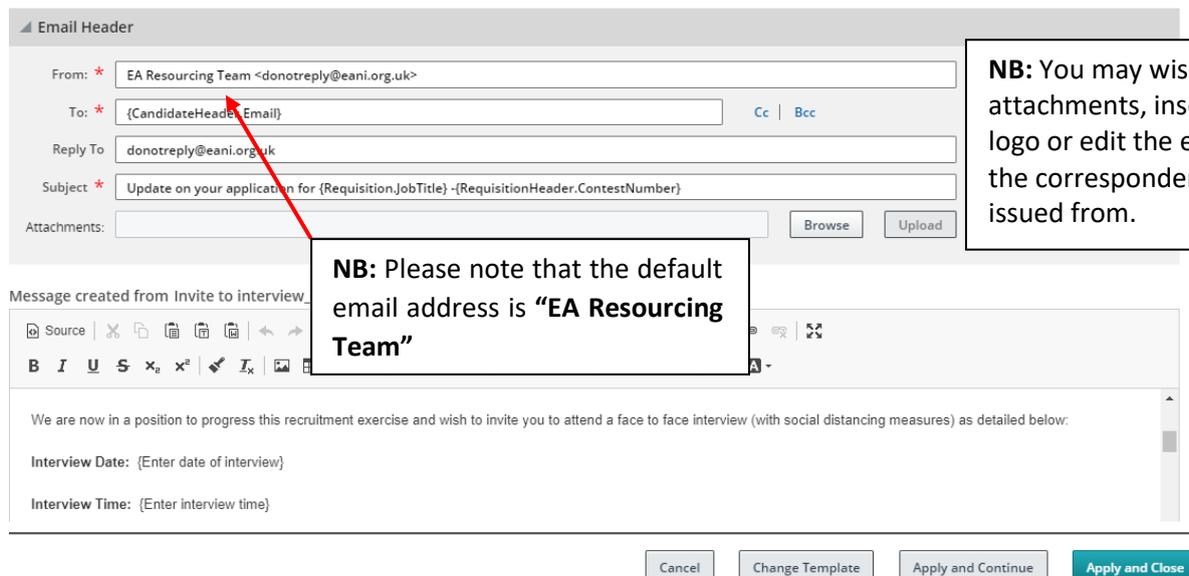


All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required by clicking the checkbox next to the paragraph title. You can use the filters to assist you with your search.



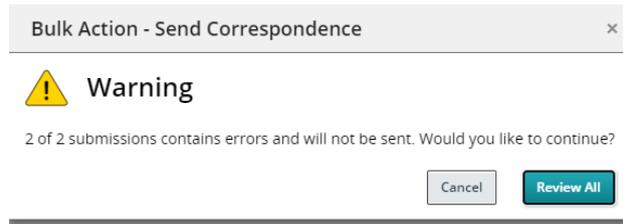
Click the **select template** button to continue.

The template will now open in an editable format. Make amendments if necessary.



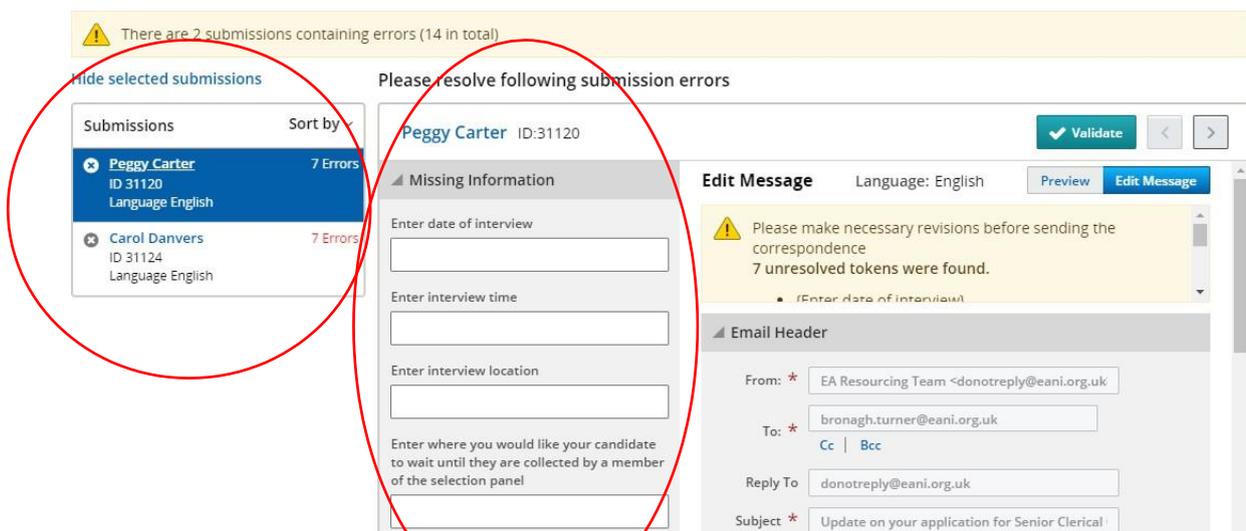
When you are ready to proceed, click on the **Apply and Continue** button to continue.

A warning pop up will now be displayed to advise that there are errors on the submission. This is referring missing information that needs to be completed on the interview letters. This missing information will be the actual interview details. To input this information, click **Review all**.



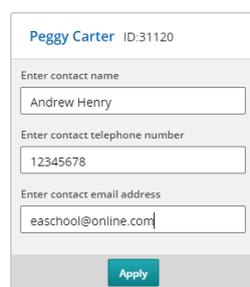
The next page within the pop up enables you to complete the missing information and tailor the correspondence for each candidate. These missing information fields may vary depending on the correspondence template you have selected to use.

Enter the interview details within the **missing information** pane.



If you have selected multiple candidates to **invite to interview**, enter the interview details for the first candidate, only leaving out the **interview time** field. You can update each candidate's interview time before sending the invite. This action will populate the information on all candidate invites and ensure you do not invite candidates to attend for interview at the same time.

When you have completed the missing information fields, click **Apply**.



The missing information that you have entered will now be displayed in the correspondence for your review.

Click on the next candidate and you will notice that the missing information fields will be populated with the information that you entered for the 1st candidate. To apply this information to the template, click the **apply** button. Continue this action for all candidates on your list.

You will now notice that each candidate will have one error on their template.



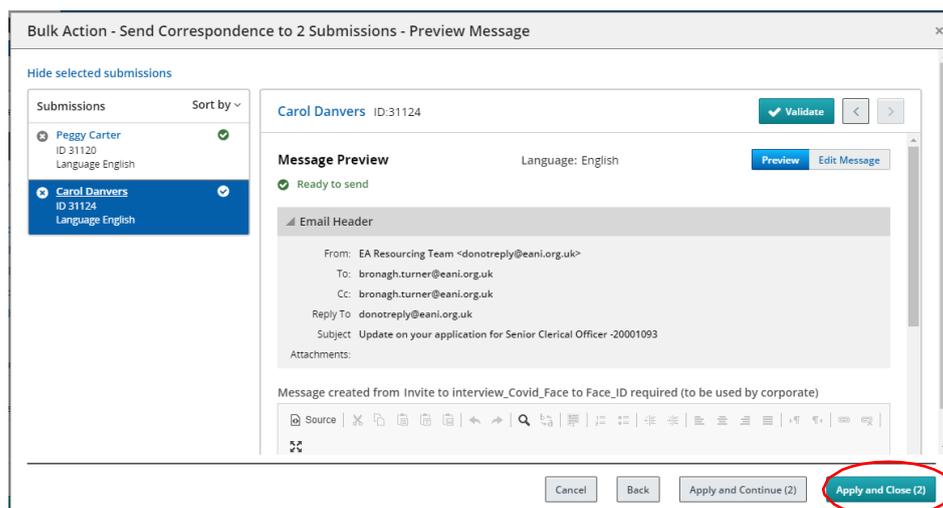
This will be the **interview time**. To populate this information for each candidate, click on the candidate name and enter the interview time that corresponds with your interview schedule. Click **Apply** to add this missing information to each of your candidates invite to interview letter.

If you need to edit a candidates correspondence, click on candidate name and then click the **Edit Message** button on the top right of the pop up. The correspondence will then open in an editable format. You will now be able to make amendments.

However, please note that this will only edit individual letters and if amendments are applicable to each candidate, this action will need to be repeated for all candidate correspondence.

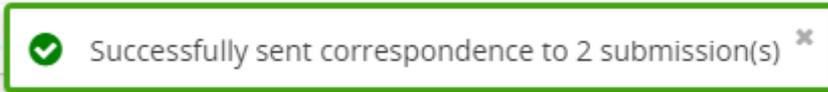
Ensure that there are no errors on the correspondence as this may prevent your correspondence from saving or sending.

To preview each candidate correspondence before sending, click on each candidate's name, it will be highlighted in a dark shade of blue.



Click **Apply and Close**. If you are sending more than one invite to interview correspondence, you will notice that there will be a number identifying the total correspondence you are about to issue in brackets on this button.

The following message will appear;



You will be returned to the requisition candidate list where you will notice that the **candidates Step and Status** has been updated to **Stage 1 interview/Assessment – Scheduled**:

<input type="checkbox"/>		Carter, Peggy (24664)			Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Scheduled	1 / 1
<input type="checkbox"/>		Danvers, Carol (24629)			Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Scheduled	1 / 1

To view the correspondence that you have just sent, click on the candidate name to access their profile:

You are here > ... > Requisition List > Submission List > Candidate View Back to Submission List < >

Submission: [Carter, Peggy for Senior Clerical Officer \(ID: 20001093\)](#)

More Actions

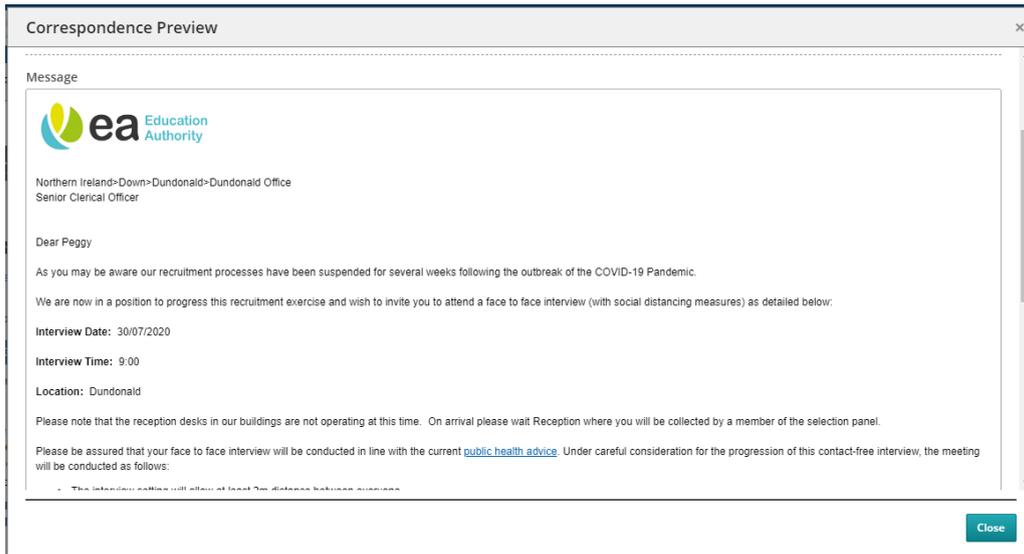
Job Submission Interviews **History**

Show history for: Current submission - Senior Clerical Officer (...)

Modify Categories: 8 out of 11 event categories selected Sort By

Senior Clerical Officer (ID: 20001093)			
Date	Events	Details/Comments	By
30-Jul-2020, 12:26:18 PM	Correspondence sent	Update on your application for Senior Clerical Officer -20001093	Hiring Manager (Hiring Manager)

From this screen, select the **History** tab. This will display all system history for this candidate. Links in blue are hyperlinks which, when clicked, enable you to view correspondences as received by the candidate:



When you are finished with this pop up. Click the **Close** button.

Inviting a candidate to a further interview/assessment

The action taken to progress a candidate to another interview/assessment is predominantly the same as detailed above. The main difference is the different step and status you will use.

Select the relevant candidate(s), click **More Actions** and select **Change Step/status**:

<input checked="" type="checkbox"/>		Carter, Peggy (24664)			Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Scheduled	1 / 1
<input checked="" type="checkbox"/>		Danvers, Carol (24629)			Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Scheduled	1 / 1

The **'Change Step and Status'** pop up will be displayed. Ensure that the **Change To Status** is updated to **Progress to 2nd Stage** and click **Apply and Continue**:

NB: Status with an asterisks at the end indicated that this is the end of the current Step and you must move the candidate to the next step in the process.

Bulk Action - Change Step and Status

You are performing this action on **2 submissions**.

Currently in	➔	Change to
Step Stage 1 Interview / Assessment		Step Stage 1 Interview / Assessment
Status Scheduled		Status Progress to 2nd Stage* Progress to 2nd Stage* Rejected Rejected Reserve Candidate Withdrawn Position Withdrawn

You will now land on a new step, **'Stage 2 Interview/Assessment'**. Ensure that the new status is updated to **Scheduled** and tick the check box under **Select Other Action** to **Send Correspondence**.

Bulk Action - Change Step and Status

You are performing this action on **2 submissions**.

Currently in	➔	Change to
Step Stage 1 Interview / Assessment		Step Stage 2 Interview / Assessment
Status Progress to 2nd Stage		Status Scheduled <small>* = completes the step</small>

Comments (Applies to all submissions individually)

Please enter comments here

Select Other Action

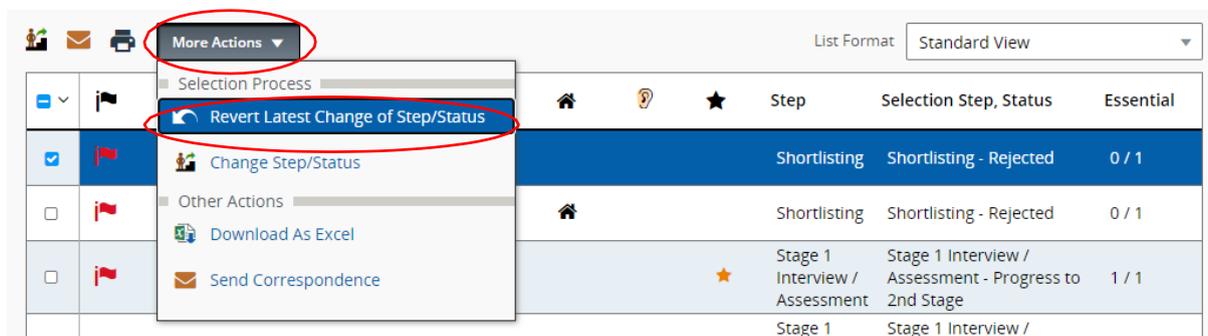
Send Correspondence

Repeat the same steps outlined before to issue the invite to interview/assessment to your selected candidate(s).

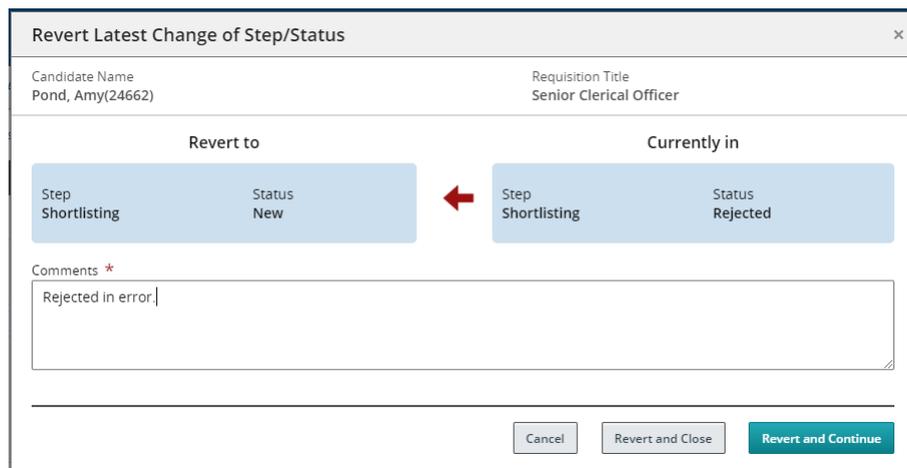
Copy the steps from before to schedule a third interview/assessment. This can only be completed if the 'Detailed Candidate Selection Workflow' was selected on the initial requisition prior to advertisement. Again, the main difference is the step and status you will use. You will need to select **Progress to 3rd stage** to land on the 'Stage 3 Interview/Assessment' step and from there you can schedule a further interview, issuing correspondence as outline above.

Reverting the Step/Status of a candidate

If you have accidentally moved a candidate to the wrong Step or Status, you will want to revert this action. To do this, select the candidate that has been moved in error, click **More Actions** and select the **Revert latest change to step/status** from the drop down menu:



The 'Revert the latest change of step/status' pop up appears:



The dialog box shows the following information:

- Candidate Name:** Pond, Amy(24662)
- Requisition Title:** Senior Clerical Officer

Comparison of current and target state:

Revert to		←	Currently in	
Step: Shortlisting	Status: New		Step: Shortlisting	Status: Rejected

Comments *
Rejected in error.

Buttons: Cancel, Revert and Close, Revert and Continue

Provide a reason for reverting the action in the comments box and click **Revert and Close**. If you need to revert a candidate by more than one Step/Status at a time, click **Revert and Continue** instead.

If you click **Revert and Continue** and there is a further Step/Status to revert, the system will now display this in the pop up. Follow the same process of providing relevant details in the comments box and click either of the Revert buttons.

If you have clicked **Revert and Continue** in error instead of **Revert and Close**, simply click the **Cancel** button to leave the pop up and no further action will be taken.

Tip: If you have reverted a step/status that originally issued correspondence to a candidate, you may need to take corrective action.

For example, if you moved a candidate to 'Rejected' in error and have issued correspondence to the candidate informing them of this, you will need to follow up with the candidate and advise them of the error.

Key point

It is recommended that all candidate correspondence is issued via the online recruitment system and not from users work or personal email address so that it can be tracked in the History tab and can be accessed or relied on at a later date if necessary.