

How to manage offer letter templates in NHS Jobs user guide

This guide gives you instructions for how to manage offer letter templates in the NHS Jobs service.

You can use offer letter templates when making an online job offer to an applicant.

In your organisations account, you can:

- create an offer letter template
- preview an offer letter template
- download an offer letter template
- change an offer letter template
- delete an offer letter template

Once a template is created, it can be used by the applicable roles in your account.

To find out which roles can do this, go to the '**Roles and permissions**' link in the '**Help and information**' section of the [employer dashboard](#).

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Offer letter templates

This page gives you instructions for how to manage offer letter templates in your organisations account.

Important: The employer dashboard is shown. You'll only see the 'Offer letter templates' link if you are an NHS Jobs 'Super user', 'Team leader' or 'Recruitment administrator' for your organisations account.

To manage your offer letter templates, complete the following step:

1. Select the '[Offer letter templates](#)' link.

The screenshot displays the NHSBSA Lee UAT Dashboard. At the top, it indicates the user is signed in as Lee Mapes. The dashboard is divided into several sections:

- Header:** NHS Jobs logo, user name 'Signed in as Lee Mapes', and a 'Sign Out' link.
- Feedback:** A 'BETA' badge with the text 'Your feedback will help us to improve this service.'
- Navigation:** 'Tasks by stage' and 'Listings by user' tabs. A dropdown menu shows 'Showing tasks for All users'.
- Tasks by Stage:** A list of recruitment stages with counts and progress bars:

Stage	Count	Progress
Draft	11	Green bar (approx. 10%)
Published	2	Green bar (approx. 10%)
Shortlisting	5 - on track 0, overdue 5	Red bar (approx. 10%)
Interviews	8	Green bar (approx. 10%)
Ready to offer	8 - on track 7, overdue 1	Green bar (approx. 10%)
Conditional offers	13 - on track 3, overdue 10	Red bar (approx. 10%)
Pre-employment checks	0	Grey bar
Contracts	3	Green bar (approx. 10%)
- What you can do:** Buttons for 'Create a job listing', 'Search for a listing', and 'Search for an applicant'.
- Manage the account:** Links for 'Manage users', 'At risk applicants', 'Accredited logos', 'Key performance indicators (KPIs)', 'Approval settings', 'Departments', and 'Welsh listings'.
- Documents and templates:** Links for 'Overview of your organisation', 'Supporting information library', 'Contract templates', and 'Offer letter templates' (highlighted with a yellow circle containing the number 1).
- Help and information:** A section at the bottom right.

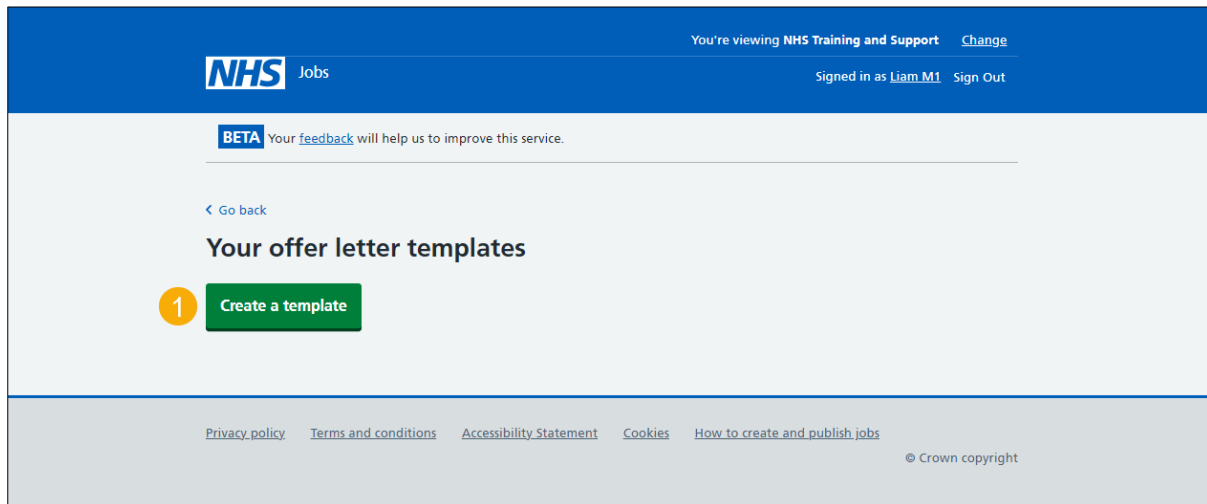
Your offer letter templates

This page gives you instructions for how to create a template.

Important: In this example, you have no offer letter templates.

To create a template, complete the following step:

1. Select the ['Create a template'](#) button.



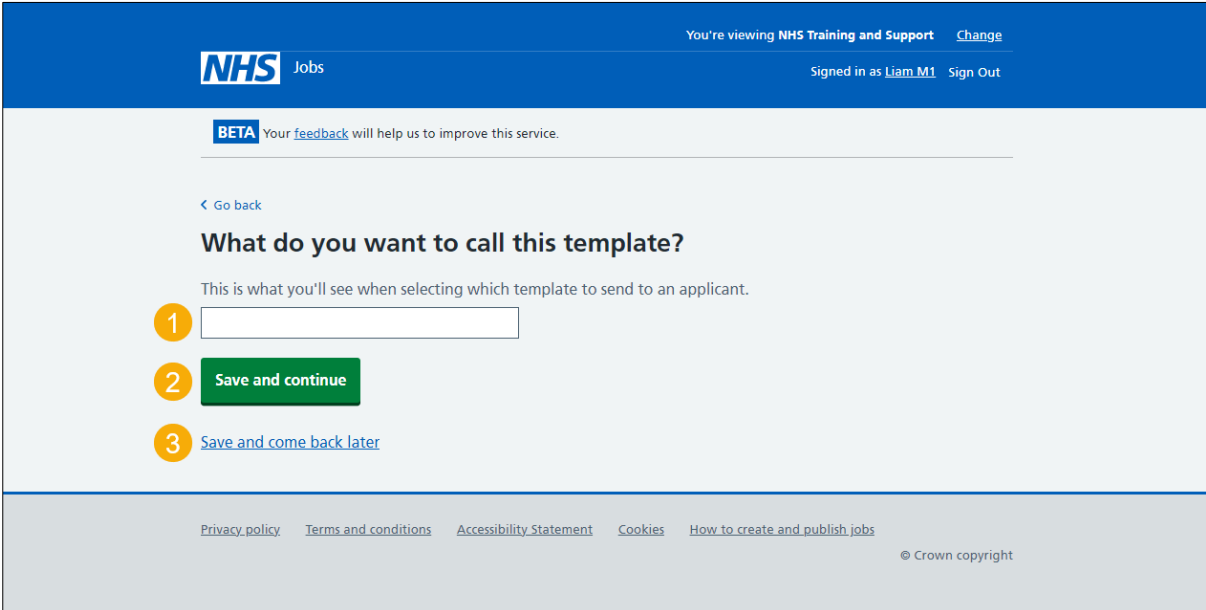
What do you want to call this template?

This page gives you instructions for how to add a template name.

Important: This is what you'll see when selecting which template to send to an applicant.

To add a template name, complete the following steps:

1. In the **Template name** box, enter the details.
2. Select the ['Save and continue'](#) button.
or
3. Select the ['Save and come back later'](#) link.



The screenshot shows the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A '< Go back' link is visible. The main heading is 'What do you want to call this template?' followed by the instruction: 'This is what you'll see when selecting which template to send to an applicant.' There are three numbered steps: 1. A text input field. 2. A green 'Save and continue' button. 3. A blue link 'Save and come back later'. At the bottom, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice: '© Crown copyright'.

If you've selected the 'Save and come back later' link, you've reached the end of this user guide.

Add fixed term

This page gives you instructions for how to add fixed terms to your offer letter template.

Important: These are the terms that were entered into the job listing and appear as fixed terms at the top of the template you're creating. You can add more fixed terms. For example, the notice period or pension contributions.

To add another fixed term, complete the following steps:

1. Select the ['Add another'](#) button.
- or
2. Select the ['Save and continue'](#) button.

You're viewing **NHS Training and Support** [Change](#)
NHS Jobs
Signed in as **Liam M1** [Sign Out](#)

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

[Go back](#)

Principal terms of employment

These are the terms that were entered into the job listing and appear as fixed terms at the top of the template you're creating.

Job title	job title
Location	address line 1 address line 2 address line 3 address line 4 postcode
Contract type	contract type
Working pattern	working pattern
Number of hours or sessions a week	hours or sessions
Contract duration	contract duration
Pay scheme	pay scheme
Band	band
Pay	pay more details about the pay (optional)

You can add more fixed terms. For example, the notice period or pension contributions.

1 [Add another](#)

2 [Save and continue](#)

[Save and come back later](#)

[Privacy policy](#)
[Terms and conditions](#)
[Accessibility Statement](#)
[Cookies](#)
[How to create and publish jobs](#)

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Add a fixed term

This page gives you instructions for how to add a fixed term.

Important: You'll only see this page if you're adding a fixed term to your offer letter template. For example, Notice period and 30 days.

To add a fixed term, complete the followings steps:

1. In the **Type of term** box, enter the details.
2. In the **Details of the term** box, enter the details.
3. Select the '[Save and continue](#)' button.

The screenshot shows the NHS Jobs website interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right side of the header, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A '< Go back' link is visible. The main heading is 'Add a term of employment'. Below this, there are two input fields. The first is labeled 'Type of term' with the example 'For example, Notice period' and is marked with a '1' in a yellow circle. The second is labeled 'Details of the term' with the example 'For example, 30 days' and is marked with a '2' in a yellow circle. Below the second input field is a green button labeled '3 Save and continue'. At the bottom of the page, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with the copyright notice '© Crown copyright'.

Manage fixed term

This page gives you instructions for how to manage the fixed terms.

Important: In this example, a new fixed term is added: Notice period and 30 days.

To manage the fixed terms, complete the following steps:

1. Select the ['Change'](#) link (optional).
2. Select the ['Remove'](#) link (optional).
3. Select the ['Add another'](#) button (optional).
or
4. Select the ['Save and continue'](#) button.

NHS Jobs
You're viewing [NHS Training and Support](#) [Change](#)

Signed in as [Liam M1](#) [Sign Out](#)

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

[Go back](#)

Principal terms of employment

These are the terms that were entered into the job listing and appear as fixed terms at the top of the template you're creating.

Job title	job title
Location	address line 1 address line 2 address line 3 address line 4 postcode
Contract type	contract type
Working pattern	working pattern
Number of hours or sessions a week	hours or sessions
Contract duration	contract duration
Pay scheme	pay scheme
Band	band
Pay	pay more details about the pay (optional)
Notice period	30 days

1 [Change or Remove](#) 2

You can add more fixed terms. For example, the notice period or pension contributions.

3 Add another

4 Save and continue

[Save and come back later](#)

[Privacy policy](#) [Terms and conditions](#) [Accessibility Statement](#) [Cookies](#) [How to create and publish jobs](#)
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Add more terms and conditions to the template

This page gives you instructions for how to add more terms and conditions to the template.

Important: Use the **How to format your template** section to add headings, bullets, and numbered information.

To add more terms and conditions to the template, complete the following steps:

1. In the **Add more terms and conditions** box, enter the details.
2. Select the [Save and continue](#) button.

NHS Jobs

You're viewing **NHS Training and Support** [Change](#)

Signed in as **Liam.M1** [Sign Out](#)

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

[Go back](#)

Add more terms and conditions to the template

1

2 [Save and continue](#)

[Save and come back later](#)

How to format your template

To put a heading in your template, use a hash:

- # This is a heading
- ## This is a sub-heading

To make a bullet point list, use an asterisk symbol:

- * Bullet information A
- * Bullet information B
- * Bullet information C

To make a numbered list, use the number, then a full stop:

1. Numbered information A
2. Numbered information B
3. Numbered information C

[Privacy policy](#) [Terms and conditions](#) [Accessibility Statement](#) [Cookies](#) [How to create and publish jobs](#)

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Check the details before creating the template

This page gives you instructions for how to check the details before creating the template.

Important: Preview the template before you create and save it. When you're satisfied that it's correct, you can save the details and create the template so it can be used to issue offer letters.

To check the details before creating the template, complete the following steps:

1. Select the ['Change'](#) link (optional).
2. Select the 'preview the template' link.
3. Select the 'download the template' link (optional).
4. Select the ['Create the template'](#) button.

The screenshot shows the NHS Jobs interface. At the top, there's a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' and 'Signed in as Liam.M1'. Below the header, there's a 'BETA' notice. The main content area is titled 'Check the details before creating the template'. It contains a form with the following sections:

- Template name:** NHS Jobs (with a [Change](#) link).
- Additional principal terms:** Notice period: 30 days (with a [Change](#) link and a yellow callout '1').
- Terms and conditions:** (with a [Change](#) link).

Below the form, there are instructions for entering text: '# Enter the heading here', '## Enter the sub-heading here', '* Enter the bullet information here', and '1. Enter the numbered information here'. A section titled 'Save and create the template' explains that users should save details to create a template for issuing offer letters. A box titled 'You can also:' contains two links: [preview the template \(PDF, 4 KB\)](#) (with a yellow callout '2') and [download the template \(PDF, 4 KB\)](#) (with a yellow callout '3'). At the bottom of this box is a green button labeled 'Create the template' (with a yellow callout '4') and a link to 'Save and come back later'. The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice: '© Crown copyright'.

Tip: If you preview or download the template, it uses a portable document format (PDF).

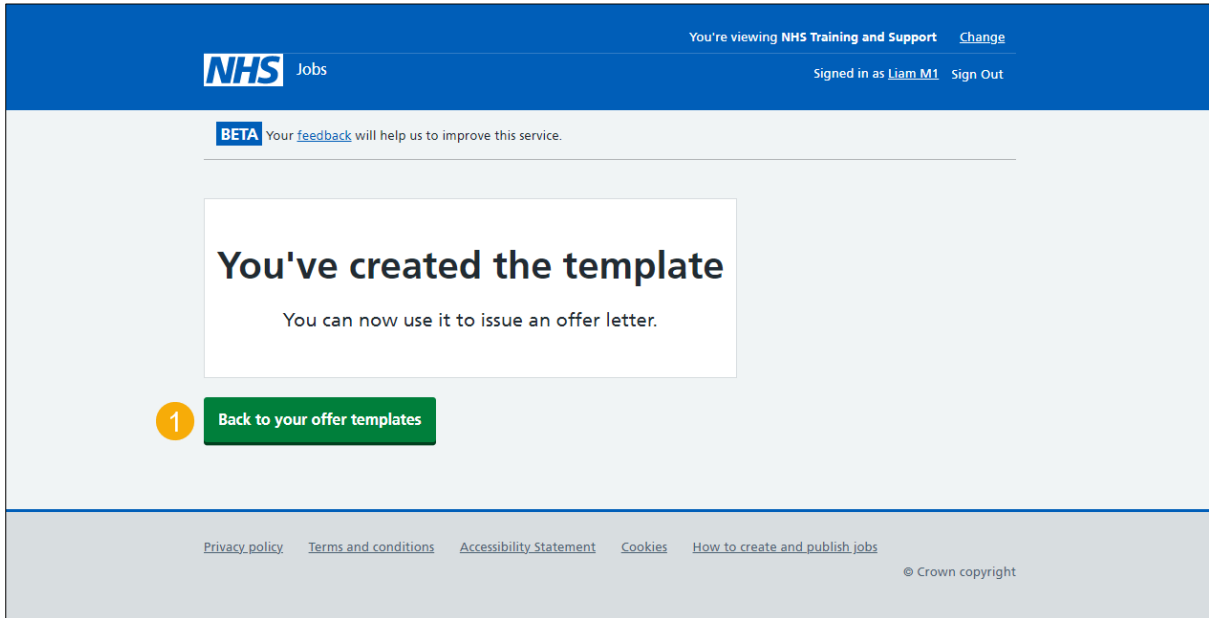
You've created the template

This page shows confirmation you've created the template.

Important: You can now use it to issue an offer letter.

To go back to your offer letter templates, complete the following step:

1. Select the ['Back to your offer letter templates'](#) button.



You've created the offer letter template. If you don't want to view your offer letter templates, you've reached the end of this user guide.

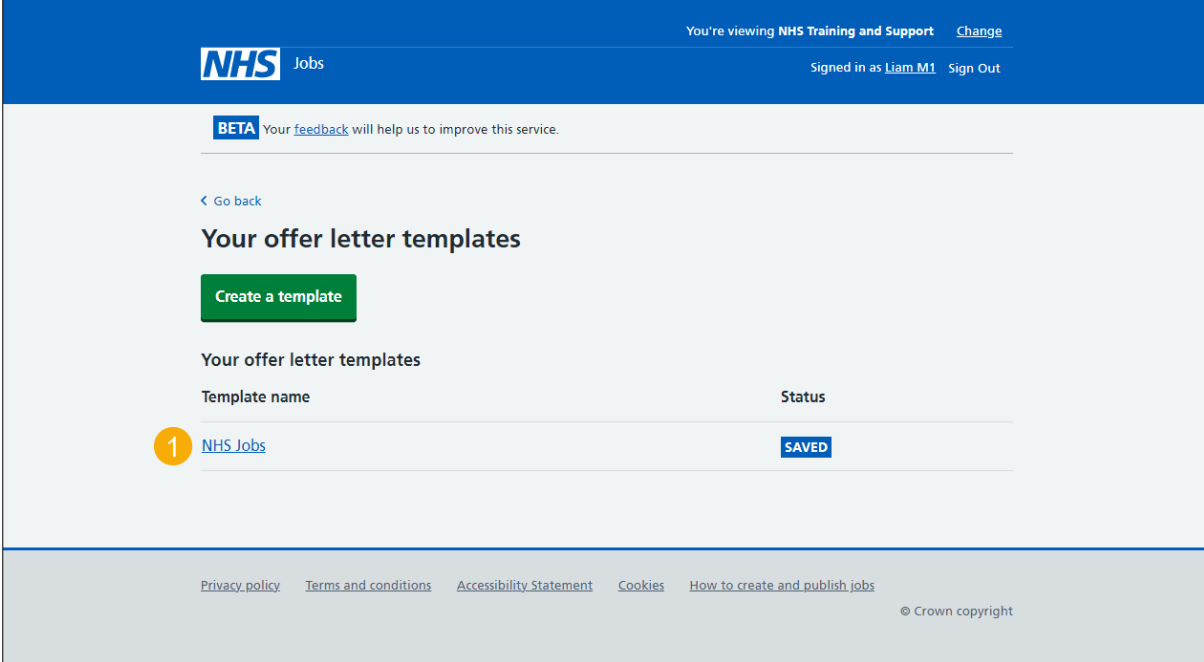
View your offer letter templates

This page gives you instructions for how to view your offer letter templates.

Important: In this example, the 'NHS Jobs' template is saved.

To view your offer letter template, complete the following step:

1. Select the ['template name'](#) link.



The screenshot shows the NHS Jobs interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A 'Go back' link is visible. The main heading is 'Your offer letter templates', followed by a green 'Create a template' button. Below this is a section titled 'Your offer letter templates' containing a table. The table has two columns: 'Template name' and 'Status'. There is one row with the template name 'NHS Jobs' and the status 'SAVED'. A yellow circle with the number '1' is placed over the 'NHS Jobs' link. At the bottom of the page, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice: '© Crown copyright'.

Manage your offer letter template

This page gives you instructions for how to manage your offer letter template.

To manage your offer letter template, complete the following steps:

1. Select the ['Change'](#) link (optional).
2. Select the ['Delete'](#) link (optional).
3. Select the ['preview the template'](#) link (optional).
4. Select the ['download the template'](#) link (optional).

The screenshot shows the NHS Jobs offer letter template management interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header, there is a 'BETA' notice: 'Your feedback will help us to improve this service.' A 'Go back' link is on the left. The main content area is titled 'NHS Jobs' and contains a table with the following details:

Template name	NHS Jobs	Change
Additional principal terms	Notice period: 30 days	Change

Below the table, there is a 'Terms and conditions' section with a [Change](#) link. The terms and conditions content includes:

- # Enter the heading here
- ## Enter the sub-heading here
- * Enter the bullet information here
- 1. Enter the numbered information here

On the right side of the table, there is a 'What you can do' box with the following links:

- [Delete](#)
- [Preview \(PDF, 4 KB\)](#)
- [Download \(PDF, 4 KB\)](#)

The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with the copyright notice '© Crown copyright'.

Tip: If you preview or download the template, it uses a portable document format (PDF).

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

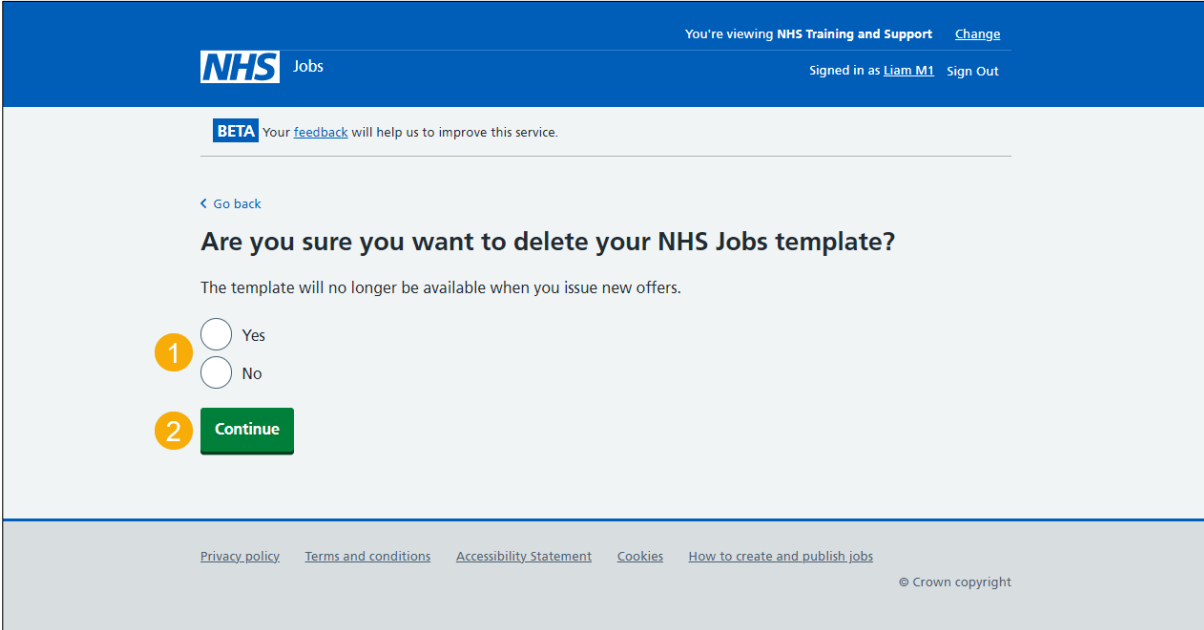
Are you sure you want to delete your template?

This page gives you instructions to confirm if you're sure you want to delete your template.

Important: The template will no longer be available when you issue new offers.

To confirm if you're sure you want to delete your template, complete the following steps:

1. Select an answer:
 - ['Yes'](#)
 - 'No'
2. Select the 'Continue' button.



The screenshot shows the NHS Jobs user interface. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right side of the header, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A 'Go back' link is visible. The main content area features the heading 'Are you sure you want to delete your NHS Jobs template?' followed by the text 'The template will no longer be available when you issue new offers.' There are two radio button options: 'Yes' (marked with a '1' in a yellow circle) and 'No'. Below these is a green 'Continue' button (marked with a '2' in a yellow circle). At the bottom of the page, there are links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', along with a copyright notice: '© Crown copyright'.

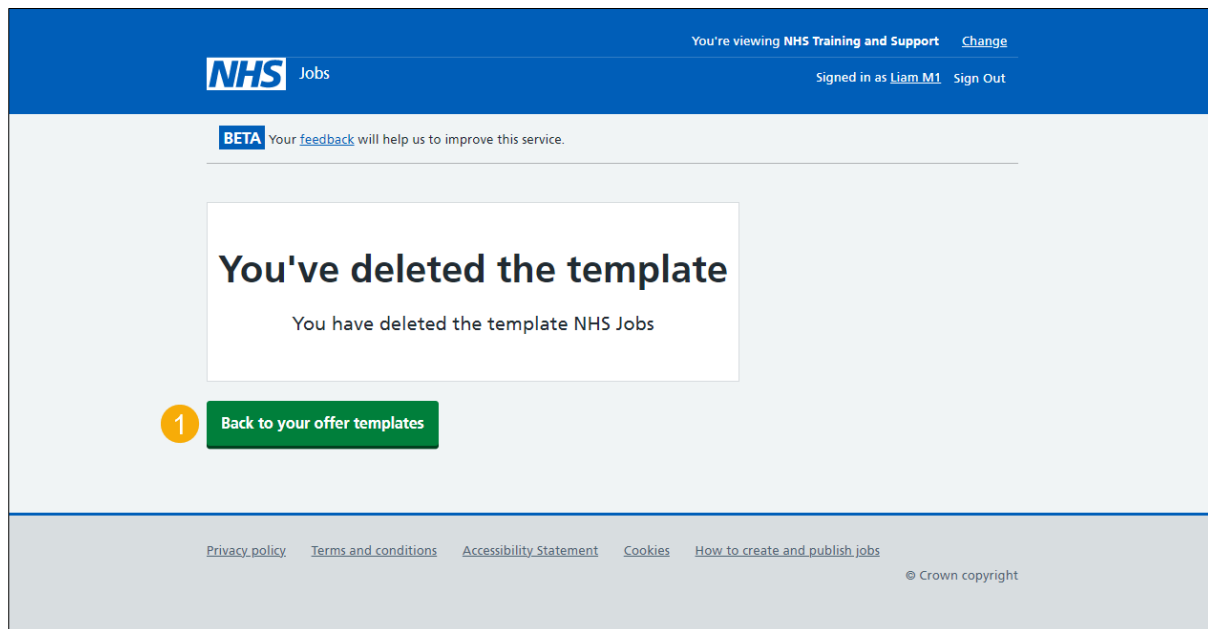
If you don't want to delete your offer letter template, you've reached the end of this user guide.

You've deleted the template

This page shows confirmation you've deleted the template.

To go back to your offer templates, complete the following step:

1. Select the 'Back to your offer templates' button.



You've deleted the offer letter template and reached the end of this user guide.