

How to manage users in NHS Jobs user guide

This guide gives you instructions for how to manage users in the NHS Jobs service.

A user account is needed to complete the necessary recruitment tasks.

In your organisations account, you can add, change, deactivate and reactivate a user's account.

The NHS Jobs roles available are:

- 'Super user'
- 'Team manager'
- 'Recruitment administrator'
- 'Recruiting manager'

Once you assign a user a role, this determines the tasks they can do.

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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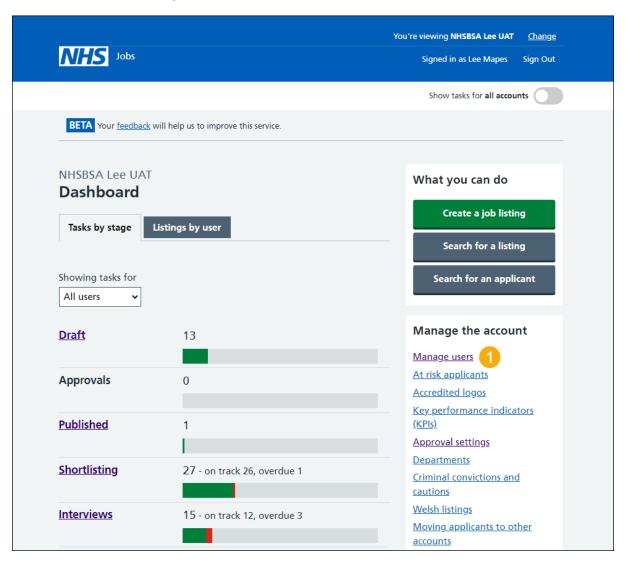
Manage users

This page gives you instructions for how to manage users for your organisations account.

Important: The employer dashboard is shown. You'll only see the 'Manage users' link if you are an NHS Jobs 'Super user' role for your organisations account.

To manage your users, complete the following step:

1. Select the 'Manage users' link.

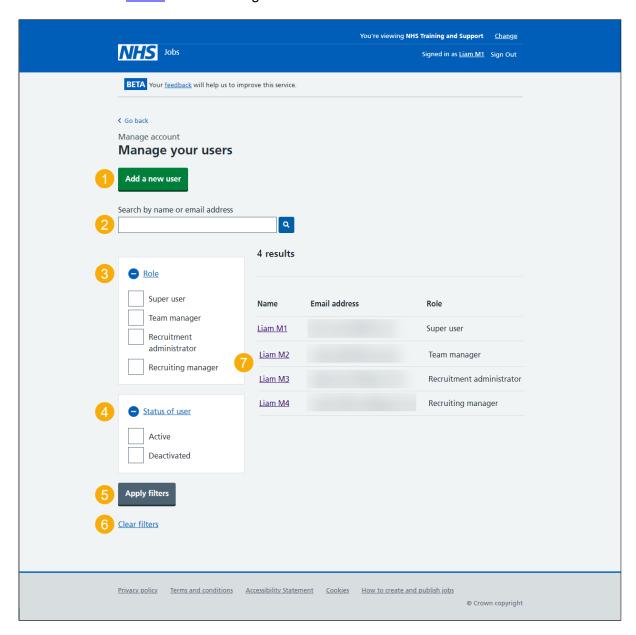


Manage your users

This page gives you instructions for how to manage your users.

To manage your users, complete the following steps:

- **1.** Select the 'Add a new user' button.
- 2. In the Search by name or email address box, enter the details.
- 3. Select the 'Role' link to filter your by role.
- **4.** Select the 'Status of user' link to filter by status.
- **5.** Select the 'Apply filters' button to filter by role and status.
- **6.** Select the 'Clear filters' link to clear the filter for role and status.
- 7. Select a 'Name' link to manage this user account.



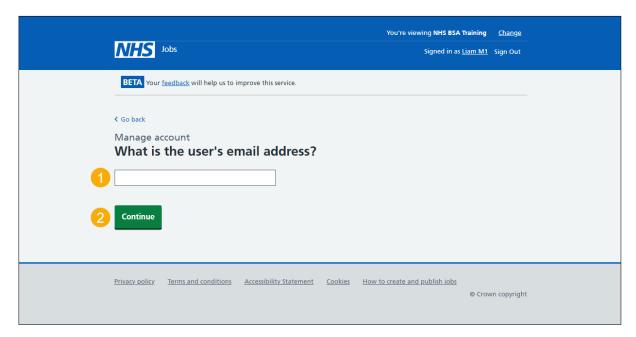
What is the user's email address?

This page gives you instructions for how to add the user's email address.

Important: You'll only see this page if you're adding a new user to your organisations account. The user will receive an email with details of how to sign into the organisation's account.

To add the user's email address, complete the following steps:

- 1. In the Email address box, enter the details.
- 2. Select the 'Continue' button.

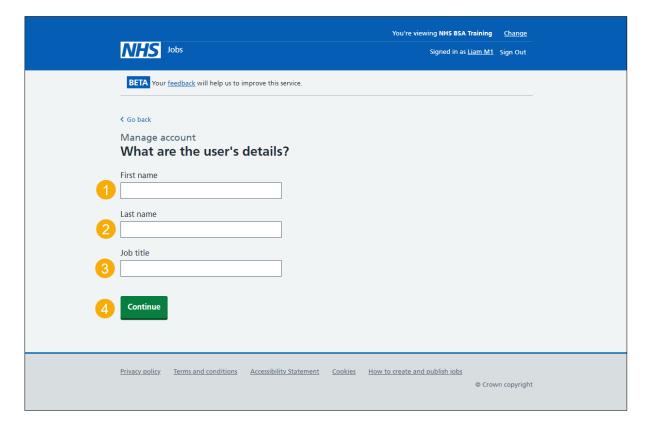


What are the user's details?

This page gives you instructions for how to add the user's details.

To add the user's details, complete the following steps:

- 1. In the **First name** box, enter the details.
- 2. In the Last name box, enter the details.
- 3. In the Job title box, enter the details.
- **4.** Select the 'Continue' button.



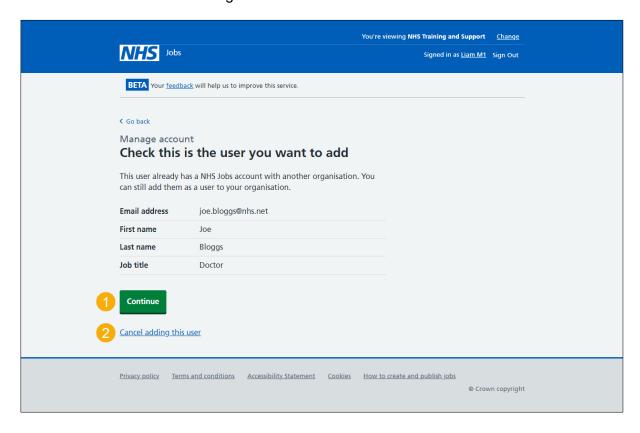
Check this is the user you want to add

This page gives you instructions for how to check this is the user you want to add.

Important: You'll only see this page if this user already has an NHS Jobs account with another organisation. You can still add them as a user to your organisation.

To confirm if this is the user you want to add, complete the following steps:

- Select the '<u>Continue</u>' button. or
- 2. Select the 'Cancel adding this user' link.



If you select the 'Cancel adding this user' link, you've reached the end of this user guide.

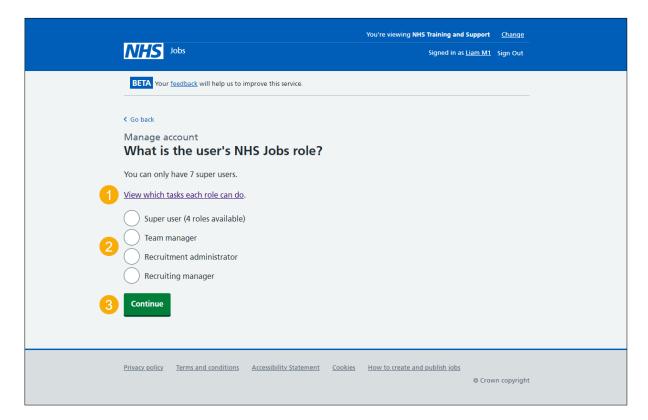
What is the user's NHS Jobs role?

This page gives you instructions for how to add the user's NHS Jobs role.

Important: You can only have 7 super users. In this example, there are 4 super user roles available.

To add the user's NHS Jobs role, complete the following steps:

- 1. Select the 'View which tasks each role can do' link.
- 2. Select an answer.
- 3. Select the 'Continue' button.



Tip: To find out what tasks users can do, go to the 'How to view which tasks each role can do in NHS Jobs' user guide or video from the 'Manage users' section on the 'Help and support for employers' webpage.

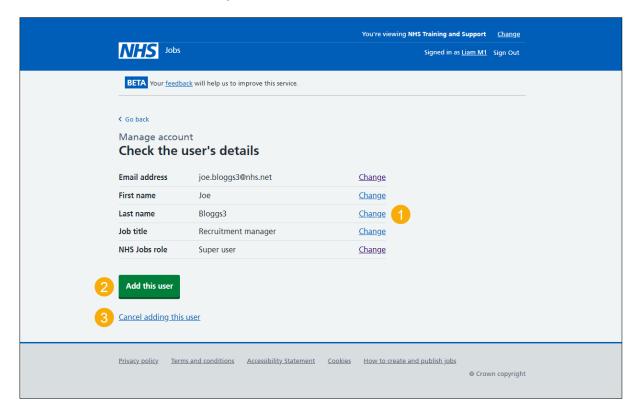
Check the user's details

This page gives you instructions for how to check the user's details.

Important: Make sure the user's email address is correct as this can't be changed once you add their account.

To check the user's details, complete the following steps:

- 1. Select a 'Change' link (optional).
- Select the 'Add this user' button. or
- 3. Select the 'Cancel adding this user' link.



If you select the 'Cancel adding this user' link, you've reached the end of this user guide.

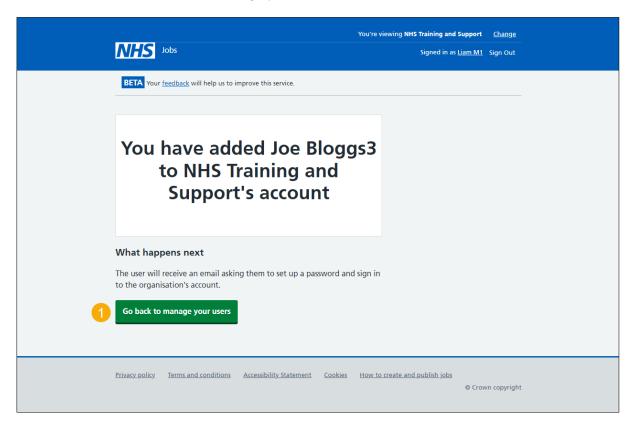
You've added the user to your account

This page shows confirmation you've added the user to your account.

Important: The user will receive an email asking them to set up a password and sign into the organisation's account.

To go back to manage your users, complete the following step:

1. Select the 'Go back to manage your users' button.



Tip: If you need to change or deactivate a user's account, go to the 'Change or deactivate a user's account' page.

You've added the user to your organisation's account and reached the end of this user guide.

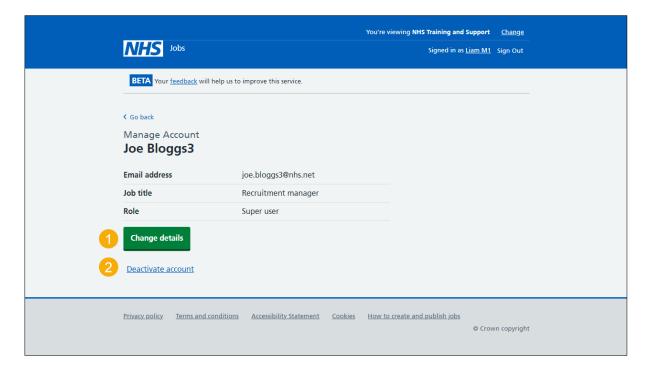
Change or deactivate a user's account

This page gives you instructions for how to change or deactivate a user's account

Important: You'll only see the 'Deactivate account' link if the user's account status is 'ACTIVE'. If you need to change your account details, contact the NHS Jobs Support Team at nhsbsa.nhsjobs@nhsbsa.nhs.uk.

To change or deactivate a user's account, complete the following steps:

- Select the '<u>Change details</u>' button. or
- 2. Select the 'Deactivate account' link.



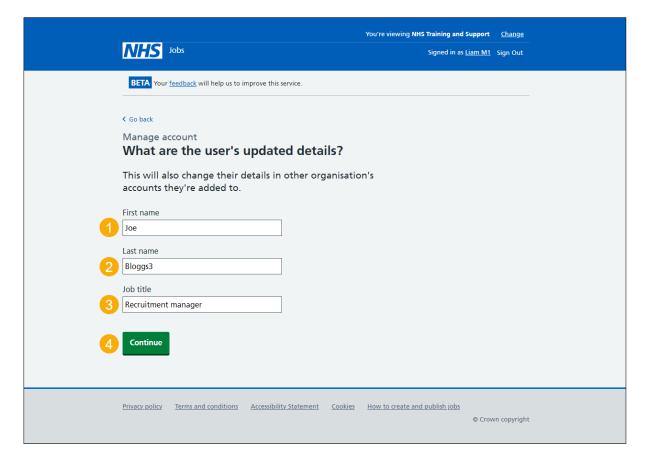
What are the user's updated details?

This page gives you instructions for how to change the user's details.

Important: You'll only see this page if you're changing the user's details. This will also change their details in other organisation's accounts they're added to.

To change the user's details, complete the following steps:

- 1. In the **First name** box, enter the details.
- 2. In the Last name box, enter the details.
- 3. In the Job title box, enter the details.
- 4. Select the 'Continue' button.



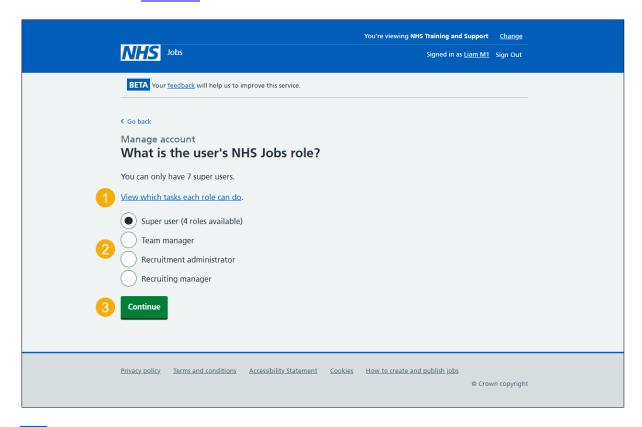
What is the user's NHS Jobs role?

This page gives you instructions for how to change the user's NHS Jobs role.

Important: In this example, the user's NHS Jobs role is a 'Super user'.

To change the user's NHS Jobs role, complete the following steps:

- 1. Select the 'View which tasks each role can do' link.
- **2.** Select an answer.
- **3.** Select the 'Continue' button.



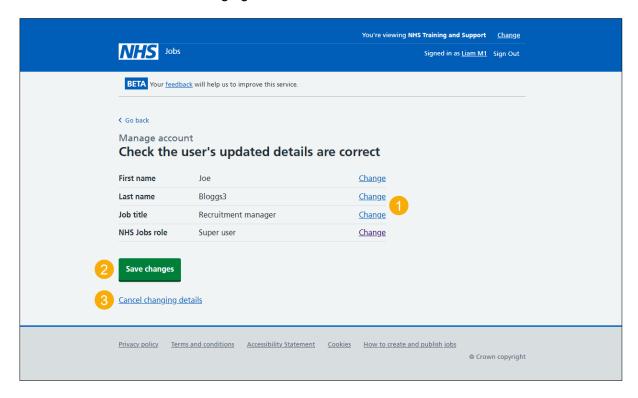
Tip: To find out what tasks users can do, go to the 'How to view which tasks each role can do in NHS Jobs' user guide or video from the 'Manage users' section on the 'Help and support for employers' webpage.

Check the user's updated details are correct

This page gives you instructions for how to check if the user's updated details are correct.

To check if the user's updated details are correct, complete the following steps:

- 1. Select a 'Change' link (optional).
- 2. Select the 'Save changes' button.
- **3.** Select the 'Cancel changing details' link.



If you select the 'Cancel adding this user' link, you've reached the end of this user guide.

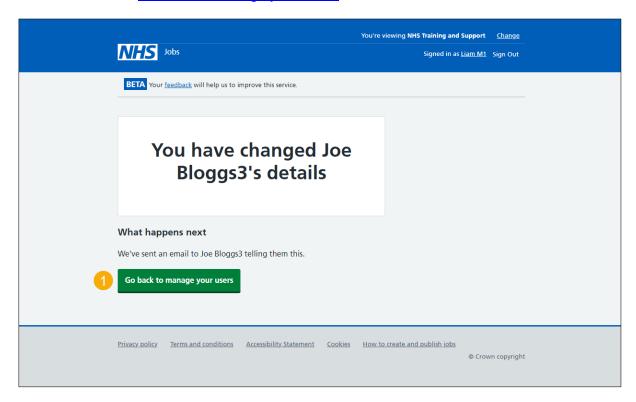
You have changed the user's details

This page shows confirmation you've changed the user's details.

Important: The user will receive an email telling them of the change.

To go back to manage your users, complete the following step:

1. Select the 'Go back to manage your users' button.



Tip: If you need to deactivate a user's account, go to the '<u>Deactivate the user's account</u>' page.

You've changed the user's details and reached the end of this user guide.

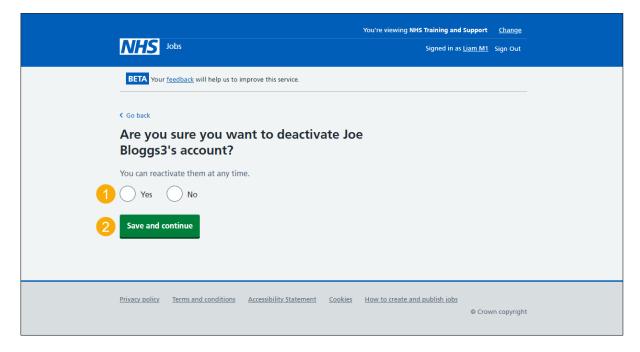
Are you sure you want to deactivate the user's account?

This page gives you instructions for how to confirm if you're sure you want to deactivate the user's account.

Important: You'll only see this page if you're deactivating a user's account. You can reactivate them at any time.

To confirm if you're sure you want to deactivate the user's account, complete the following steps:

- 1. Select an answer:
 - 'Yes'
 - 'No'
- 2. Select the 'Save and continue' button.



If you don't want to deactivate the user's account, you've reached the end of this user guide.

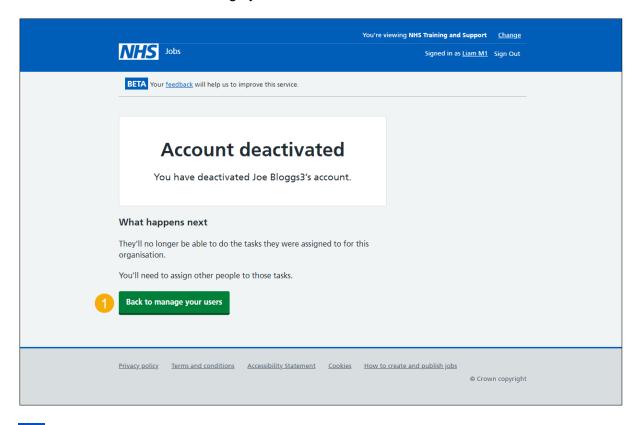
Account deactivated

This page shows confirmation the user's account is deactivated.

Important: Once a user is deactivated, they'll no longer be able to do the recruitment tasks they were assigned to for this organisation. You'll need to assign other people to those tasks.

To go back to manage you users, complete the following step:

1. Select the 'Back to manage your users' button.



Tip: If you need to reactivate a user's account, go to the 'Reactivate account' page.

You've deactivated the user's account and if you don't want to reactivate their account, you've reached the end of this user guide.

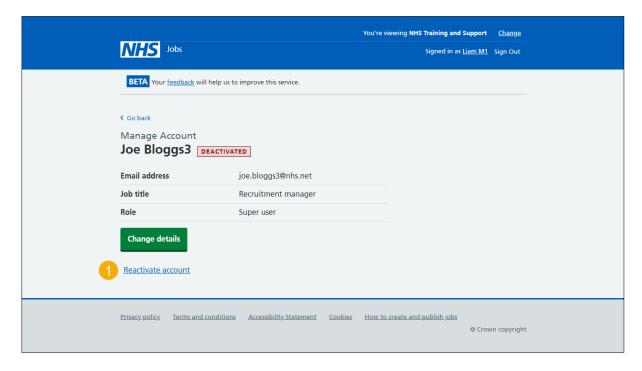
Reactivate account

This page gives you instructions for how to reactivate a user's account.

Important: You'll only see the 'Reactivate account' link if the user's account status is '**DEACTIVATED**'.

To reactivate a user's account, complete the following step:

1. Select the 'Reactivate account' link.



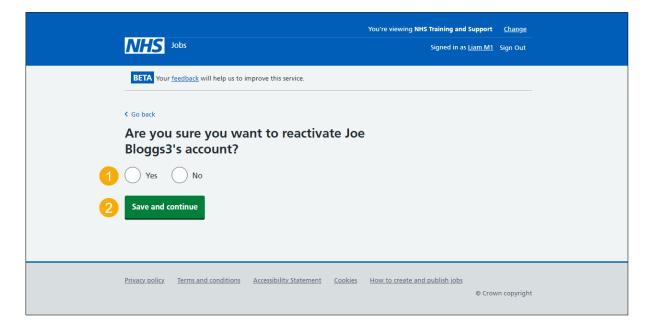
Are you sure you want to reactivate the user's account?

This page gives you instructions for how to confirm if you're sure you want to reactivate the user's account.

Important: You'll only see this page if you're reactivating a user's account. You can deactivate them at any time.

To confirm if you're sure you want to reactivate the user's account, complete the following steps:

- 1. Select an answer:
 - 'Yes'
 - 'No'
- 2. Select the 'Save and continue' button.



If you don't want to reactivate the users account, you've reached the end of this user guide.

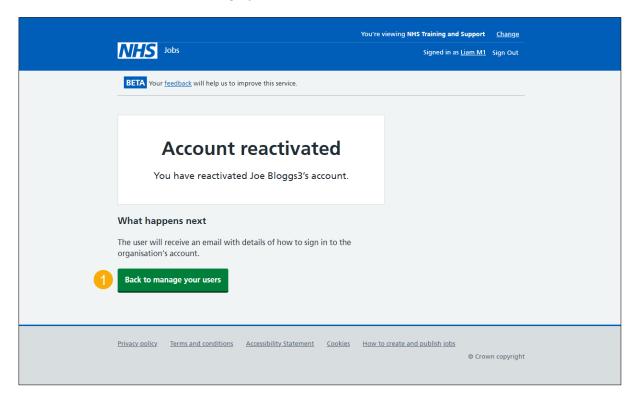
Account reactivated

This page shows confirmation the user's account is reactivated.

Important: The user will receive an email with details of how to sign into the organisation's account.

To go back to manage your users, complete the following step:

1. Select the 'Back to manage your users' button.



You've reactivated the user's account and reached the end of this user guide.