Recruitment Module Guide

EPM Connect Guide

Document Control

Document Overview: This document provides a step by step guide to adding users and managing permissions and notifications within EPM Connect.

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 24th March 2026 and is issued on a version-controlled basis under her signature.

Document History

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Contents

Recruitment Module Guide

Our Recruitment Module provides a consistent, structured framework that reduces human error, minimises paperwork, and streamlines every stage of the hiring process. From the creation of the advert through to shortlisting, interviews, references, and offers, every step is managed within one central system—giving you full visibility and control throughout.

A key advantage is the ability to seamlessly convert candidates into employees. Candidate data flow directly into the employee record, removing the need for manual re-entry. This not only saves significant administrative time and cost but also reduces the risk of human error.

You can configure approval workflows, maintain a complete audit trail, and manage recruitment forms, applications, shortlists, and supporting documents with ease. Vacancies can be advertised wherever you choose, with a simple iframe link to your application form to enable capture within the module. Talent Pools and the ability to contact candidates who have partially completed applications, encourage current and future applications, whilst pre-screening and killer questions can be tailored to support effective shortlisting. Once submitted, applications are automatically captured alongside candidate details and documents, while the ability to add offline candidates manually, ensures all applicants are managed within a single system.

Successful candidates can be onboarded with ease and with no duplication of data entry: ensuring accuracy, efficiency, and a professional experience. The module, together with the Employee, Training and CPD and Performance modules help you to attract, manage, and retain the best talent for your school or Trust.

Create a vacancy

To create a vacancy, you must first create a post or there must already be an approved post showing within the **Employee** section.

Add a new post

To create a new vacancy the post must be approved and showing in **Approved Posts**.

1. On the left-hand side of the system window, select **Employees**. A list of further menu options are displayed.
2. Select **Posts**. A list of further menu options are displayed.
3. Select **All Posts**. The main page is displayed.

   If the employee is leaving in, for example in 6 months time, a vacancy can be created from a filled post.

4. Click **Add Post**, a new **+ Create Post** page is displayed.

5. In the **ID** text box, add an ID. This can be in any format.
6. In the **Title** text box, add a title.

7. From the **Post Type** drop-down, select a post type.
8. In the **Description** text box, add a description.
9. Complete the details within the **Job information** section of the form.
10. Within the **Approval** section, tick the **Requires Approval** box if the post requires approval.

    If this box has been ticked, select the approvers from the **Users** or **User Groups** drop-down menu.

11. Click **Save** to finish.

    When adding a post you can determine if a post needs approval. Should it not need an approval, leave the **Requires Approval** box at the bottom of the form empty.

    If the post has gone through approval, you can edit the details in the future, for example a Full Time post changes to a Part Time post.

    If the post have already been approved, the post should be archived and a new post created with any changes.

    If you are creating a new post that is similar to an existing one (for example, a Teaching Assistant role), you can save time by using the **Copy** function. Click the **Copy** icon on the far right-hand side (next to the edit/pencil icon).

    The system will duplicate all existing details from that post, allowing you to amend only the fields that need to change. This avoids re-entering information and ensures consistency across similar roles.

Edit a post

If the post has gone through approval, you can edit the details in the future, for example a Full Time post changes to a Part Time post. If the post have already been approved, the post should be archived and a new post created with any changes.

1. On the left-hand side of the system window, select **Employees**. A list of further menu options are displayed.
2. Select **Posts**. A list of further menu options are displayed.
3. Select **Approve Posts**. The Approve Posts page is displayed, detailing all posts sent for approval.

    The **Open** tab details all posts yet to be approved.

    The **Closed** tab details all approved and rejected posts.

4. Select the **Open** tab.

5. Click the pencil icon. A new page is displayed.
6. Make the changes as required.
7. Click **Save** to finish.

Approve a post

1. On the left-hand side of the system window, select **Employees**. A list of further menu options are displayed.
2. Select **Posts**. A list of further menu options are displayed.
3. Select **Approve Posts**. The Approve Posts page is displayed, detailing all posts sent for approval.

   The **Open** tab details all posts yet to be approved.

   The **Closed** tab details all approved and rejected posts.

4. Select the **Open** tab.
5. Click the tick icon. A new page is displayed.
6. Scroll down the page and in the **Approval Note** text box, enter an approval note if relevant.
7. Click either the **Approve** or **Reject** button.

8. The post will move to the **Closed** tab.

Create a vacancy from a current post

1. On the left-hand side of the system window, select **Employees**. A list of further menu options are displayed.
2. Select **Posts**. A list of further menu options are displayed.
3. Select **All Posts**. The **Posts** page is displayed.

   This creates the structure within the organisation, which is why it includes posts that are currently unfilled.

4. Click the title of the post you wish to convert into a vacancy. The **+ Edit Post** page is displayed.

   You can also view all current posts within **Posts Map**. This provides an organisation chart and will show all the posts within the organisation and who each post reports to.

   To select a post, click the pencil icon next to the relevant post.

5. Click the **Create Vacancy** button, located under **Linked Job Role** information.
6. In the **Vacancy ID** text box, enter a vacancy ID

   Choose a system that works for your school/Trust for example SCITEACH060423 or simply 1245. The ID can be a combination of numbers and/or letters.

7. In the **Start Date** field, select a start date from the calendar.

   This is the date you wish to start the recruitment – ie the date the vacancy will go live.

8. In the **Target Date** field, select a target date from the calendar.

   This is the date you expect the post to be filled and all checks to have been undertaken.

9. In the **Candidates Expiration Date** field, select a candidates expiration date from the calendar.

   This defaults to 6 months from the date the candidate applies, unless they allow their data to be held for a longer period.

10. From the **Approval** drop-down, select a user or user group or do not tick **Requires Approval**.
11. Select the **Requires Approval box** if it applies.
12. From the **Users** drop-down menu, select all users that apply or from the **User Groups** drop-down menu, select the user group that applies.

    Once you have created a vacancy from a post you have created, all the details will pull through into the vacancy. These details cannot be amended once the vacancy is added so ensure they are correct whilst still editing the post. However additional vacancy information can be changed. For example, **start date** and **target date**.

13. Click **Save** to finish. The page refreshes with new tabs at under the vacancy details.

    The vacancy will now be open but the advert is not yet live. This can be managed within the **Advert** tab below.

Edit a vacancy

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The **Vacancies** page is displayed.

4. Click the pencil icon next to the vacancy you wish to edit.
5. Edit the details and click **Save** to finish.

Approve a vacancy

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **Approve Vacancies**. The Approve Vacancies page is displayed, detailing all vacancies sent for approval.

   The **Open** tab details all posts yet to be approved.

   The **Closed** tab details all approved and rejected posts.

4. Select the **Open** tab.

5. Click the tick icon. A new page is displayed.

6. Scroll down the page and in the **Approval Note** text box, enter an approval note if relevant.
7. Click either the **Approve** or **Reject** button.

8. The post will move to the **Closed** tab.

Set up and manage vacancies

Once the vacancy is created you will need to work through the tabs:

- **Advert:** Create an advertising campaign
- **Recruitment Process:** Set up the recruitment process
- **Recruitment Panel:** Select a recruitment panel
- **Application Form:** Create an application form
- **Pre-screening Questions:** Create pre-screening questions
- **Interviews:** Set up interviews.
- **Set advert as live**

Advert – Create and set advert as Live

This is the tab you will use to create the advert campaign on the job portal as well as the school/Trust's website.

1. Create the vacancy by following the Create a Vacancy Guide above.
2. Scroll down and select the **Advert** tab.

   Ensure you begin with the **Advert** tab. The other tabs cannot be fully completed until the **Advert** tab has been completed.

3. Click the **+ Start New Advert Campaign** button. The Add Advert Campaign page is displayed.

   The information in this page is only viewable to users of the Recruitment module (ie not to candidates), however all of the fields within the **Advert** section will be visible to candidates once the **Show On Every Candidate Portal** toggle and **Show On Trust Website** toggle at the top of the screen are moved to **YES**.

   Ensure these are all set to **NO** until everything is ready to go live.

4. Check and complete the details in the form.

   Many of the details will have pulled through from the post itself, however you can make any changes which you wish to be visible within the advert itself.

   Salary details will not pull through, as you may wish to add this as a range rather than a specific salary.

5. Complete **Benefits, About School, Job Description, Essential Criteria, Desired Criteria** and **Acknowledgement Message**.

6. Click **Start Campaign** to finish. The information you have entered is now saved.

Clicking **Start** Campaign will save the information as a draft, allowing you to come back to it at a later time, or ask a colleague to review it.

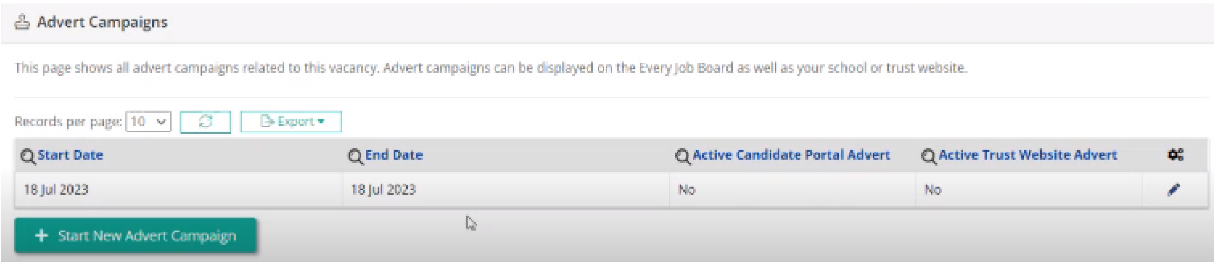
Once you have clicked **Start Campaign**, the page will show a number of additional areas to complete. The advert is now listed within the **Advert** tab.

7. Scroll down to **Documents** (under **Contact Number)** and select from the drop-down menu options.
8. Click **Click to copy advert URL into the clipboard**. This can be added to your website or within the **Application Information** within any of your job adverts on other job boards.
9. To set the advert as live, ensure you have moved the toggles at the top of the advert to **YES**.

Troubleshooting

If your advert has not appeared within the candidate portal, check that the **Active Candidate Portal Advert** and **Active trust Website Advert** fields both display **YES** and that the **Start Date** is correct.

To edit any of this information click the pencil icon. The **End Date** can be changed by adjusting the **Application Deadline**. Ensure you click **Save** to finish.



Recruitment Process – Set Up

The Recruitment is set to default to **Application Received**, **Shortlisted** and **Rejected**, however you can add any additional stages you wish by clicking the **Add Recruitment Process** button.

Add optional target dates for each of these stages of the process and change the order by dragging and dropping the stages into the order you require. The system will use these target dates to assess whether the recruitment for this vacancy is on target.

1. Select the **Recruitment** tab.
2. In the **Target Date** text box within each stage, select a target date.
3. Click the **+ Add Recruitment Process** button to add a new Recruitment Stage.

4. From the **Stage** drop-down menu, select an option.
5. **Recruitment Stages** can be updated in **Recruitment Settings**.

6. In the **Target Date** text box, enter a date.
7. Repeat the process to add additional recruitment stages.
8. Drag and drop the stage to re-order the stages.
9. Click **Save** to finish.

Recruitment Panel - Set Up

This tab allows you to set up the individuals within the panel and within the **Applications Approval Team**. Individuals added will receive notifications regarding. This will also decide which permissions the panel can view. The equalities and diversity information will be anonymised for all members on the panel.

When individuals are added into the **Recruitment Panel** they will view a version of the application which anonymises ED&I information and sensitive questions.

1. Select the **Recruitment Panel** tab.
2. From the **Recruitment Panel** drop-down menu, select the users you wish to add.

   The **Recruitment Panel** can edit this vacancy and manage linked candidates.

   If none of the users added within the **Recruitment Panel** field have Safer Recruitment Training (confirmed within the **Pre-employment Checks** area of the **Employee Record** in **Employees**), the system will raise this as a warning.

3. Within the **Application Approval Panel** drop-down menu, select the users you wish to add.

   The **Applications Approval Team** can approve applications. This is a team of individuals who approve applications as they come in. If they are on the panel they will see anonymised versions. They can approve candidates or reject them if they do not meet the required criteria or if they have failed any of the killer questions that you have set up.

   Unapproved applications will sit in **Unapproved Vacancies**. You can also leave this area empty which prevents the need for applications to be managed via this process.

   If the **Applications Approval Team** field is left blank, everyone with access to the applications can approve them.

   If there is a single approver, that user will be the only user who is able to approve applications for this vacancy.

   If there is more than one approver, then all selected uses must approve the application. If any of the Applications Approval Team reject the application, the whole application will be considered rejected.

4. Click **Save** to finish.

Vacancy Approval

When adding vacancies there is an option to set the vacancy as requiring approval. To do this tick the **Requires Approval** box when adding a vacancy and choose the users or user groups who will approve the vacancy.

The **Vacancy Approval** tab within the vacancy will only show the vacancies which have been approved and the name of the person who has approved the vacancy.

Vacancies awaiting approval will be shown within the **Awaiting Approval** tab and can be managed here or within the **Approve Vacancies** page.

Application Form – Create

The application form will be attached to the vacancy and the applicant will complete this when they click **Apply.** The questions and answers completed within this form will be saved against the applicant.

Custom forms are built within **Settings**. Ensure you give each customised form an easily recognisable name.

1. Select the **Application Form** tab.
2. From the **Application Form** drop-down menu, select the form you wish to include within this vacancy.
3. Click **Save** to finish.

A **Saved Successfully** message will appear at the top of the screen.

Pre-screening questions - Create

Optional **Pre-screening** questions can also be attached alongside the application form. The questions in this form will be pulled through to the application form for this vacancy. The questions and answers completed within this form will be saved against the applicant. You can build custom forms within **Settings**.

1. Select the **Pre-screening Questions** tab.
2. From the **Pre-screening Questions** drop-down menu, select the questions you wish to include within this vacancy.
3. Click **Save** to finish.

A **Saved Successfully** message will appear at the top of the screen.

Interviews – Create forms

This tab allows you to add select the interview forms you have created within **Settings**, however these are for internal use only and cannot be viewed by applicants. Ensure you give each customised form an easily recognisable name.

You can add multiple interview stages, for example adding a First and Second Stage Interview or a Task.

1. Select the **Interviews** tab.
2. Click the **+ Add Interview** button.

3. From the **Interview 1** drop-down menu, select the form you wish to include within this vacancy.
4. Click **Save** to finish.

   A **Saved Successfully** message will appear at the top of the screen.

Add Documents

Both standard and signable documents can be added to the vacancy. This function can be used to attach documents that relate to the candidate, whilst also sending documents to the candidate for signing.

Add Standard Document

This function can be used to attach documents that relate to the candidate and if managed can be made visible to candidates.

1. Select the **Documents** tab.
2. Click **Edit Documents**.
   

3. Select the **Documents** tab. The **Documents** page is displayed.
4. Scroll down to **Documents** and click the **+ Upload Documents** button.
   

   Signable Documents must be first added as documents within the **Documents** section.
5. In the **Title** field, enter the title.
6. Click **Select** file.
   

7. In the **Expiry Date** field, select a date.
8. Do not click the **Create a signable document from this file after upload** if you wish to make the document signable.

   This is not required for standard documents.
9. Click the **Save** button.
   

   The item will appear within the **Documents** section.

Make document visible to candidates

Documents can be made visible to employees via the Candidate Portal Visibility button.

1. Click the **Candidate Portal Visibility** button. A **Vacancy Documents Visibility** window is displayed.
2. Click the pencil icon next to the document you wish to make visible to candidates.
3. From the **Selected Candidates** drop-down menu, select the relevant candidates.

   The selected document will be visible to each candidate selected.
4. Click the **Save** button.
   

Add Signable Document

This function can be used to attach documents that relate to the candidate and if managed can be made visible to candidates.

1. Select the **Documents** tab.
2. Click **Edit Documents**.

3. Select the **Documents** tab. The **Documents** page is displayed.
4. Scroll down to **Documents** and click the **+ Upload Documents** button.

Signable Documents must be first added as documents within the **Documents** section.

5. In the **Title** field, enter the title.
6. Click **Select** file.

7. In the **Expiry Date** field, select a date.
8. Click the **Create a signable document from this file after upload**
9. Click the **Save** button.

The item will appear within the **Documents** section.

5. Click the **Save** button. The screen refreshes and new fields appear.

6. In the **Name** field, enter a name.
7. In the **Message** field, enter a message.

This can be over-written with a bespoke message.

8. In the **Signature Deadline** field, select a date.

This must be a future date, not today's date.

9. The **Document** field will have already been added within the previous screen.
10. From the **HR User Notification** drop-down menu, select the email address of the employee the document relates to and where relevant Line Managers who you wish to receive notifications.

Selected users will receive an email notification whenever any action has been taken, for example the document has been signed or read. Notifications should be set up within **Employees Settings**.

11. From the **Choose HR Recipients** drop-down menu, select the users that apply.

If selected the school signatories will be able to view this document within **My Documents** within **My Portal**.

The recipient is the owner of this document, this means that after users have signed this document, the document will stay attached to the employee profile. If there are multiple recipients there will be multiple signable instances of this document that will belong to each individual recipient.

12. Leave the **Choose Bureau Recipients** field blank.

    This field is not currently in use

13. From the **Choose Candidate Recipients** drop-down menu, select the users that apply.

    Select the candidate(s) you wish to sign the document.

    The document will stay attached to the candidate profile. If there are multiple recipients there will be multiple signable instances of this document that will belong to each individual recipient.

Add Signatories

Important

A user representing the Employer (school) should be added as the first signature. If multiple employers need to sign the document, on behalf of the school or trust, these should be added as subsequent signatories. The Candidate should always be the final signatory.

Employer Signatories

1. Click the **+ Add Signatory** button. A new window is displayed.

2. From the **HR**, **Bureau or Candidate** drop-down menu, select **HR User**.
3. From the **Users** drop-down menu, select the user that apply.

    Select the email address of the user who will be signing on behalf of the school. Alternatively select **Signer Tags**.

4. From the **Signer Tags** drop-down menu, select the signer tags that apply.

    Signer Tags allow you to set groups of signatories.

    Signer Tags are set up in **Employee Settings**.

5. From the **Approval Condition** drop-down menu, select the approach that applies for document to be classed as approved.

    Requires signing by All: Requires each user or signer tag to sign the document.

    Requires signing by Any: Requires just one user or signer tag to sign the document.

6. From the **Approval Order** drop-down menu, select first.

    This will allow the employer to sign first on behalf of the school or Trust. The candidate will not be able to view or sign the document until all other signatories have signed the document.

7. Click the **Save** button. The window closes.

8. Repeat the process for all additional employee signatories.

Candidate Signature

You should now repeat the process for the candidate.

1. Click the **+ Add Signatory** button. A new window is displayed.

2. From the **HR or Bureau User** drop-down menu, select an option.
3. From the **Users** drop-down menu, select the employee.
4. From the **Approval Condition** drop-down menu, select either option.

   Either option can be used for employees.

5. From the **Approval Order** drop-down menu, select and option.

   Select the next available order, for example if you have already selected First and Second for employers signing on behalf of the school/trust, select **Third**.

6. Click the **Save** button. The window closes.

7. Click the **Save** button within the main page.

8. Click the email icon on the far right-hand side of the document listed. A preview of the email is displayed.

   This is the email that will be sent to the employee. The email content cannot be changed.

9. Click **Send**.

The document will now be sent to the school signatory to sign. This will appear as a **Task** within the **Task Management Module** and within **My Tasks** within **My Portal**.

Once this has been completed, it will be sent to the candidate to sign.

Once signed by both parties, the document will be visible to the candidate within **My Documents** in **the Candidate Portal**.

Check the progress of the contract or letter

Once the document has been sent for signing, we recommend checking the progress of the document to ensure that all parties have signed the document, in order to ensure compliance.

1. From the left-hand side of the system, select **Recruitment**. A list of further options is displayed.
2. Select **Vacancies**. A list of further options is displayed
3. Select **All Vacancies**.
4. Click the pencil icon on the far right-hand side of the vacancy you wish to view. The vacancy is displayed.
5. Scroll down the page and select the **Documents** tab from the horizontal tabs under the vacancy information.
6. Check the **Is sent for signing** column within the data table to ensure the document has been sent.

   Yes indicates the document has been sent.

   No indicates the document has not been sent.

   To send the document, click the email icon next to the relevant document and click **Send**.

7. Check the **is signed by everyone** column.

   Yes indicates the document has been signed by everyone.

   No indicates the document has not been signed by all parties.

   Click the eye icon and select the **Signatories** tab to view whether the document has been read and signed by each party.

   Click the pencil icon to edit. Editing will remove all signatures from the document.

   Click the cross icon to delete the document.

   Click the double arrow icon to reset the document. This will remove all signatures.

   Click the envelope icon to send the document for signing.

   Click this icon to preview the document. The document will appear within your download files.

   Click this icon to make the document signable

   Click this icon to download the document.

Approve vacancies

When adding vacancies there is an option to set the vacancy as requiring approval. To do this tick the **Requires Approval** box when adding a vacancy and choose the users or user groups who will approve the vacancy.

Vacancies awaiting approval will be shown within the **Awaiting Approval** tab of the **Vacancies** page and can be managed here or within the **Approve Vacancies** page.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **Approve Vacancies**. The **Approve Vacancies** page is displayed.
4. Click the pencil icon next to the vacancy you wish to edit to check the details first.
5. Scroll down to the bottom of the screen and click the **Vacancy Approval** tab.
6. Click the tick icon to approve the vacancy.
7. Click **Save** to finish.

   Save

Setting an Advert as Live

Once you have completed all the main tabs, you can set the advert as live.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Click the pencil icon next to the vacancy you wish to edit. The vacancy information is displayed.
4. Scroll down to the tabs at the bottom of the page and select the **Advert** tab.
5. Click the pencil icon on the right of the advert you wish to make live.
6. Double check the details and ensure that the **Start Date** and **End Dates** are correct.
7. Change all relevant toggles to **YES**. The advert will now be live and you are able to receive applications from candidates.

   YES
8. Click **Save** to finish.

   Save

Troubleshooting

If an advert is not showing on the portal or your website, go to the Advert section and ensure that the **Start Date** and **End Dates** are correct and that all relevant toggles are marked as **YES**.

Edit a live vacancy during the recruitment process

These tabs are generally only relevant once the vacancy is live.

Vacancy Approval

The **Vacancy Approval** tab within the vacancy will only show the vacancies which have been approved and the name of the person who has approved the vacancy.

Documents – Add documents

See **Add Documents** guide above.

Notes – Add notes

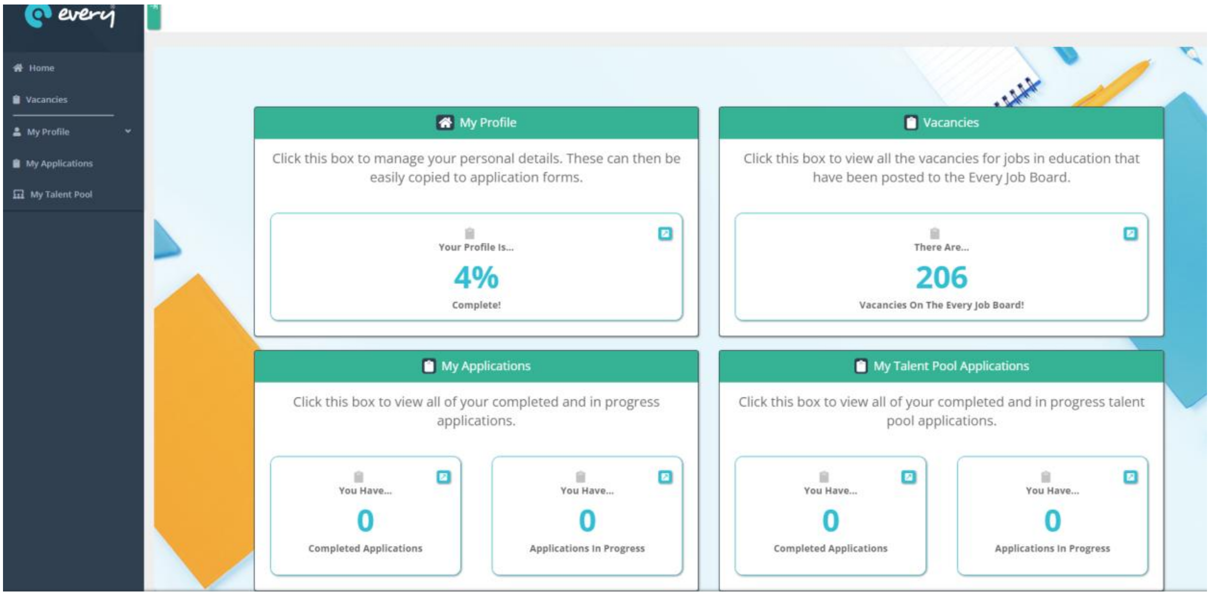
1. Select the **Notes** tab. The Notes page is displayed.
2. Click the **+ Add Note** button and create a title.

3. Click **Save** to finish.

Candidate Portal



The **Candidate Portal** allows candidates to apply for roles advertised by EPM Connect. This portal is separate from the EPM Connect platform and can be viewed by clicking on this link: https://candidates.epmportal.uk/.

My Profile

My Profile displays the candidate's personal information, sensitive information, experience, qualifications and referees with various mandatory fields. This information will pull through into each application the candidate completes, preventing the need for candidates to complete this information each time they apply for a role. The candidate must include 2 references, including their current employer. Documents can also be uploaded and candidates can edit or provide additional information for particular roles.

My Applications

My Applications displays all applications in process in addition to applications previously submitted by the candidate.

Candidates can also view any messages within this section, that they have sent or have been received from the school/Trust and respond to any messages.

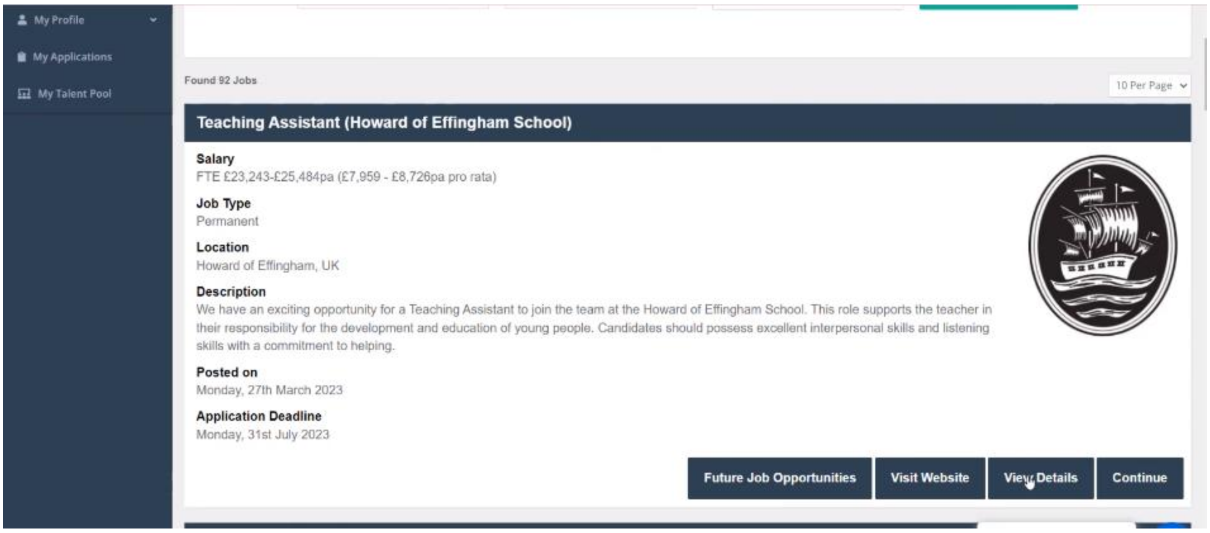
My Talent Pool

My Talent Pool will allow candidates to join the School/Trust Talent Pool for any future roles. This will allow the School/Trust to view prospective candidate for future roles.

Vacancies

Vacancies displays all live vacancies and candidates can search using key words or postcodes. Each vacancy will preview the basic details of the vacancy and allows the candidate to select **Future Job Opportunities**, **Visit Website** or **View Details** to view the full vacancy, or click **Apply Now** or **Continue** if they have already started the application.

The candidate will complete any Pre-screening questions and then **Personal Information, Sensitive Information, Education, Employment History, Referees,** which will be pre-populated with information within their profile, in addition to **Application Form Questions** which are specific to the advert.



Once the applicant has completed the application, they will be sent through to the **Recruitment Module** of the system for your team to view and move through the recruitment stages.

The candidate will complete any Pre-screening questions and then **Personal Information, Sensitive Information, Education, Employment History, Referees,** which will be pre-populated with information within their profile and **Application Form Questions**. Once the applicant has completed the application, they will be sent through to the **Recruitment Module** of the system for your team to view and move through the recruitment stages.

Managing Applications

Once applications have been received, they can be viewed and approved or rejected by the **Approval Team**. Before candidates can be managed via the recruitment process, their applications must be approved by an **Approver**.

The **Applications Approval Team** who don't have full access to the system, will see an anonymised application and therefore only see the **Applicant ID** and not the **Name** of the individual.

The **Applications Approval Team** will also be able to view any applicants that have failed any of the **Killer Questions**. This makes it easier for the Approver as they can go ahead and reject any of the candidates who display a **YES** under **Failed Killer Questions.**

Killer Questions

Killer questions allow you to set questions that if failed can be used to reject candidates. For example: Do you have QTS?

You can reject applicants who have failed killer questions individually or en-masse, or view each applicant's answer and application before making a decision. This allows you to quickly reject candidates who have failed essential criteria. We recommend checking that a response has not failed on a technicality before making a decision to reject an applicant.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The **All Vacancies** page is displayed.
4. Click on the **Vacancy ID** of the vacancy you wish to view.
5. Scroll down and select the **Applications** tab
6. Click on the **Candidate ID** of any of the candidates who have a **YES** under **Failed Killer Questions.** This will take you to **View Applicant**.

Reject applicants based on Killer Questions

You can reject applicants who have failed killer questions individually or en masse, or view each applicant's answer and application before making a decision.

1. To reject any of these applicants, tick the box on the far right of any applicants you wish to reject or, tick the box within the heading to highlight all applicants.

   We recommend checking that a response has not failed on a technicality before making a decision to reject a candidate.

2. Click the **x Reject selected applicants** button to reject applicants.

   Rejected applications will move into the **Rejected Applications** section at the bottom of the screen.

View applicant answers to Killer Questions

If there are a limited number of applications for a particular role, you may decide not to reject applicants who have failed killer questions.

1. Click the **Name** of the applicant you wish to view. The **View Applicant** screen is displayed.
2. Click **Failed Killer Questions** to view their response to any killer questions.

Approve or Reject Applications

Applicants who have applied through the **Candidate Portal** must be approved via the approval panel before they can be shortlisted.

You can view and approve applications within the **Applications** tab of the vacancy itself, or within the **Candidates** section of the **Recruitment** module.

Approve Applications via Vacancy

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The Vacancies page is displayed.
4. Click the pencil icon next to the relevant vacancy.
5. Scroll down and select the **Applications** tab to view the full application and details.

   Any gaps in employment will be flagged and a reason provided by the candidate.

6. To download the application, scroll to the top of the candidate profile and click either **Download Full Application** or **Download Anonymised** (this anonymises name, address, sensitive information).
7. Tick the box on the far right-hand side of the applicants you wish to approve or reject, or tick the box in the column header to highlight all applicants to select all.
8. Click **+ Approve selected applicants**.

Approve Applications via All Candidates

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.
4. Select the **Applications for Approval** tab.
5. Tick the box on the far right-hand side of the applicants you wish to approve or reject, or ick the box in the column header to highlight all applicants to select all.
6. Click **x Reject selected applicants**.

Manage Candidates via the Vacancy

Candidate applications must be approved by **Approvers** before being managed via further stages. All **Approved Applications** will sit in the **Applications** area waiting for the **Recruitment Panel** to approve or reject them.

Once an applicant becomes a candidate you can view their information but can also edit it, with, for example, further information they have provided at interview or after the application was received.

1. On the left-hand side of the system window, click **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The **Vacancies** page is displayed.
4. Click on the **Vacancy ID** of the vacancy you wish to view.
5. Scroll down and select the **Candidates** tab.

   Shortlisted Candidates – These are applications who have been shortlisted or manually entered candidates who did not apply via the candidate portal.

   Rejected Applications – These are applications that have been rejected.

   Candidates without a continuous link to a Candidate Profile: Click the button below to view these candidates.

Update candidate information

Candidate information can be edited to reflect additional information provided during the recruitment process. This is also useful to manage candidates who have applied outside of the standard recruitment process. All amendments are recorded within the **Audit Trail**, with a time stamp and the name of the person who has edited the information.

To edit candidate information, click the pencil icon next to the candidate you wish to edit.

The following tabs can be viewed and edited:

- Experience
- Education
- Interview 1
- ED&I
- Application
- Pre-screening
- References
- Documents
- Notes
- Audit Trail

Experience

This tab provides information regarding the candidates work experience. Previous roles should be entered in chronological order, from most recent to oldest. Any gaps in information will be shown and require an explanation before saving.

Click the **Add** button to enter additional experience. A new set of **Experience** fields will open.

Education

This tab provides information regarding the candidates work experience.

Previous roles should be entered in chronological order, from most recent to oldest. Any gaps in information will be shown and require an explanation before saving.

Edit the information and click **Save**. Click **+ Create Candidate Qualification** to add a qualification.

Interview 1 – Add notes

This tab allows you to view and edit the relevant Interview form you chose when adding the vacancy.

Edit the information and click **Save** to finish.

ED&I

This tab allows you to view and edit Ethnicity, Diversity and Inclusion information.

Edit the information and click **Save** to finish.

Application

This tab allows you to view and edit the custom application form for this candidate. Custom forms are created in **Settings**.

Edit the information and click **Save** to finish.

Pre-screening

This tab allows you to view and edit the assigned custom form for this candidate. Custom forms are created in **Settings**.

Edit the information and click **Save** to finish.

References

This tab allows you to view and edit reference information received for the candidate.

1. Click the **+ Create Candidates Reference** button and edit the information.
2. Move the toggles to **YES** or **NO** to reflect the statements.

3. Click **Save** to finish..

Edit Reference

1. Click the pencil icon and complete the information.
2. Click **Save** to finish.

Documents

This tab allows you to save documents related to this candidate's application.

Click the **+ Add Document** button to add documents and see the **Add Documents** guide above.

Notes

This tab allows you to save notes related to this candidate's application.

Click **+ Add Note**, to add a note.

Audit Trail

The **Audit Trail** provides a full view of all changes made to a candidate file, including a tie stamp and the name of the user that has made the changes.

Manage candidates through the recruitment process

1. To move the candidate through the recruitment process, from the **Recruitment Process Stage** drop-down menu select **Application Received**, **Shortlisted**, **Rejected**, **Successful**, **Called to Interview**, **References** or any other stages set up during **Settings**.

Send candidate messages

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Click **Vacancies**. A list of further menu options are displayed.
3. Click **All Vacancies**. The **Vacancies** page is displayed.
4. Click on the **Vacancy ID** of the vacancy you wish to view.
5. Scroll down and select the **Candidates** tab.
6. Click the pencil icon next to the candidate you wish to view.
7. To send a candidate a message, click the **Message** button at the top of the screen.
8. To view messages, click **Messages**, located under **Contact Details**.

You will be able to send/respond to a message and see the full chat history from before they were an approved applicant.

Add candidates to the system that did not apply via the candidate portal

Candidates who did not apply via the candidate portal, can be added manually.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The **Vacancies** page is displayed.
4. Click on the **Vacancy ID** of the vacancy you wish to view.
5. Scroll down and select the **Candidates** tab.
6. Within the **Shortlisted Candidates** area, click the **+Add Candidate** button.

7. Complete the details within the form
8. Click **Save** to finish.

Add a candidate to your Talent Pool

Candidates who have applied for roles within the school can be invited to join your Talent Pool. This is really useful for high quality candidates that have not been successful as it allows you to notify them of future roles and remain in contact, with the aim to encourage them to apply for future roles.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The **Vacancies** page is displayed.
4. Click on the **Vacancy ID** of the vacancy you wish to view.
5. Scroll down and select the **Candidates** tab.
6. Click the pencil icon next to the candidate you wish to view.
7. Click the **Add to Talent Pool** button. A new window is displayed.

The window displays the message which will be sent to the candidate inviting them to your Talent Pool. Due to GDPR guidelines, candidates cannot be added to your Talent Pool without their consent.

8. Click **Send** to send the message.

Convert candidate to employee

The system allows you to convert successful candidates into employees at the click of a button. All candidate data will be transferred into a new employee record.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.
4. Click the name of the employee you wish to convert.
5. Click the **Covert to Employee** button. Click the **Covert to Employee** button and the data will automatically populate the employee record.

6. Update any of the fields not already completed and the employee record is ready to view.

   Important

   It is important to check all details entered by the candidate and to ensure for example that abbreviation of forenames have not been used.

User Link

You can either link the employee to an existing employee or create a new user by entering a new email address.

If the user/email is not present in the list then they do not have access to this property.

If the employee is already employed within the organisation

From the **Link to Existing User** drop-down menu, select the employee.

If the employee is new to the organisation

In the **Enter New User Email** text box, enter the employee's email.

User Groups

1. From the **User Group** drop-down menu, select all the user groups that apply.

Single Central Record Check

1. Within the **Single Central Record Checks** section, click the **+/-** button.

2. Select all the checks that you wish to be undertaken on behalf of this employee.
3. Click **Save** to finish. You will be taken to the **Employee** section.

   All information already received and added to the candidate information will be pulled through into the **Employee** section.

   The only documents that do not pull through are any **Documents** that have been added and any **References**.

4. Complete the remaining fields within the **Personal Information**, **Qualifications**, **ID & Other Checks**, **Pre Employment Checks** and **Employee Documents** sections.

Adding a role to the employee

1. Scroll down to the **Select Job Role** section and click the **Add Job Role** button. A new window is displayed.
   

2. Complete the fields and click **Save** to finish.
   

3. From the **Post** drop-down menu, select the post that has been filled by the employee. This will link the employee to the post that was unfilled and also update the **Linked Job Role** within the **Post**.

   If the **Post information** was not completed when adding the post, you will need to add the information from scratch.

4. Complete the remaining fields within the **Job Information**, **Salary Information**, **Pensions & Benefits**, **Job Documents** and **Probation** sections.

Closing the vacancy

To close the vacancy you will need to return to the **Recruitment** module.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Vacancies**. A list of further menu options are displayed.
3. Select **All Vacancies**. The **Vacancies** page is displayed.
4. Select the **Vacancy ID** of the vacancy you wish to close.
5. Scroll down and click **Close Vacancy** to close the open vacancy. The vacancies is closed and will appear within the **Closed Vacancies** tab within the **Vacancies** section.
   

Candidates

The candidate section allows you to view, manage and add candidates.

View and edit candidates

The **Candidates** page provides an overview of all candidates within the system and allows you to view and edit candidate details.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.

   Candidates tab: Candidates are applicants who have been shortlisted or manually entered to the shortlist as their application did not come through the candidate portal.

   Expiring tab: These candidate records are older than the candidate data retention date set in their vacancy, and should be considered for deletion if their data is no longer required.

   Applications tab: These are applicants who have applied through the **EPM Connect Candidate Portal** and are not yet approved.

   Applications For Approval tab: These are applicants that have applied through the **EPM Connect Candidate Portal** and require your approval prior to be shortlisted.

   Proactive Applicants Recruitment: These are applicants who started the application process for a vacancy within the **EPM Connect Candidate Portal**, but haven't yet completed it.

4. Click the pencil icon next to the candidate you wish to view.
5. Edit the details and click **Save** to finish.

Add candidates

To add a candidate, follow the steps below or alternatively manage this directly via the **Add Candidates** page of the **Recruitment** module.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.
4. Click the **+ Add Candidate** button.

5. Complete the candidate details and click **Save** to finish.

Additional tabs within the All Candidates page

There are a number of additional tabs within the **All Candidates** page, including:

- Proactive Application Management
- Expiring Candidates
- Applications

Proactive Application Management

The **Candidate Portal** tracks candidates that have started the application process for a vacancy within the **Candidate Portal**, but haven't yet completed it. These can be viewed within the **Proactive Applicants Recruitment** tab, within the **Candidates** section of the **Recruitment** module.

Send messages to these candidates to prompt them to complete the application, or gain feedback regarding why they did not complete the application. This can be invaluable in developing your recruitment process to maximise the number of applications you receive.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.
4. Select the **Proactive Applicants Recruitment** tab.

5. Click on the open email icon to preview the email.

6. Click the closed email icon to send an email to the prospective applicant.

   The email will have a direct link to the advert and the contact details that were on the advert.

   Candidates do not need to be pre-registered with the **EPM Candidate Portal**. Even if they apply via another job board, they can apply via the URL and use the **Candidate Portal**.

Expiring Candidates

This tab will highlight any candidates who are older than or approaching their candidates data retention date. It will not delete automatically but will highlight those that should be considered for deletion.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.
4. Select the **Expiring** tab to view all expiring candidates.

Applications

The Applications tab displays all **Unapproved Applications** and **Rejected Applications**.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Candidates**. A list of further menu options are displayed.
3. Select **All Candidates**. The **Candidates** page is displayed.
4. Select the **Application** tab to view all expiring candidates.

   Unapproved Applications are applications that have not yet been approved by the Approval panel.

5. Click **+ Approve selected applications** to approve or **x Reject selected applications** to reject the application.

Rejected Applications are applications that have been rejected by the **Approval Panel**.

6. Click **View Application without a continuous link to a Candidate Profile** to view applicants without a link to a Candidate Profile.

Applications For Approval

The **Applications for Approval** tab displays all applicants who have applied through the **EPM Connect Candidate Portal** and require your approval prior to be shortlisted.

To view information about a particular applicant, click the eye icon.

Talent Pools

Candidates who have applied can be invited to join your Talent Pool. This is really useful for high quality candidates that have not been successful as it allows you to notify them of future roles and remain in contact, with the aim to encourage them to apply for future roles.

Talent Pools candidates can be managed within the **Talent Pool** section of the Recruitment module.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Talent Pool**. The Talent Pool page is displayed.
3. Select the relevant tab you require. The table can be filtered using the magnifying glasses or sorted using the column headings.

   Candidates: Displays all the candidates within your talent pool.

   Confirmation Emails Sent: Displays all emails sent to candidates inviting them to join your Talent Pool, the date sent, answer status and the date the answer was received.

   Vacancy Emails Sent: Displays all emails sent to candidates invited to join a vacancy in the Talent Pool.

   Vacancy Approvals: Displays all candidates that failed a killer question/s while applying for a vacancy via the Talent Pool.

   Applicants: Displays all candidate portal users that requested to join the talent pool.

   Applicant Approvals: Displays all candidate portal users that requested to join the talent pool and are still awaiting approval.

   Use the action icon to see, approve or reject a candidate's application.

Trust Overview

The Trust Overview provides you with a Trust view of the Recruitment Module, with the ability to view all **Vacancies**, **Candidates** and **Talent Pools** within the Trust. You cannot add new vacancies via the Trust Overview, this should be done via the individual property (school) **Recruitment** Module, but you are able to edit existing vacancies.

Vacancies

The All Vacancies tab provides an overview of all current and closed vacancies and filled and unfilled posts.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **All Vacancies**. The **Vacancies** page is displayed.
3. Select the tab you require.

View and edit Vacancies

The **Vacancies** tab displays all current live vacancies.

1. Select the **Vacancies** tab.
2. Click the pencil icon to view and edit a vacancy.
3. Edit the details you require and click **Save** to finish.

Closed Vacancies

The **Closed Vacancies** tab displays all closed vacancies. **Closed Vacancies** can be reopened and made live by changing the **Start Date** and **Target Date**.

1. Select the **Closed Vacancies** tab.
2. Click the pencil icon to view and edit a vacancy.
3. To reopen the vacancy, scroll down and in the **Start Date** field, enter a new date.
4. In the **Target Date** field, enter a new date.
5. In the **Candidate Data Retention Date** field, enter a new date.
6. Click **Save** to finish.

Posts to Fill

The **Posts to Fill** tab displays posts that are currently vacant or will become vacant soon. Select the **Posts to Fill** tab.

1. Click the pencil icon to view and edit the post.
2. Edit the details.
3. Scroll down and click the **Create Vacancy** button. A new page is displayed.

Create a Vacancy

1. Click the **Create Vacancy** button, located under **Linked Job Role** information.
2. In the **Vacancy ID** text box, enter a vacancy ID

   Choose a system that works for your school/Trust for example SCITEACH060423 or simply 1245. The ID can be a combination of numbers and/or letters.

3. In the **Start Date** field, select a start date from the calendar.

   This is the date you wish to start the recruitment – ie the date the vacancy will go live.

4. In the **Target Date** field, select a target date from the calendar.

   This is the date you expect the post to be filled and all checks to have been undertaken.

5. In the **Candidates Expiration Date**. Field, select a candidates expiration date from the calendar.

   This defaults to 6 months from the date the candidate applies, unless they allow their data to be held for a longer period.

6. Select the **Requires Approval** box**.**
7. From the **Approval** drop-down, select a user or user group or do not tick **Requires Approval**.
8. if it applies.
9. From the **Users** drop-down menu, select all users that apply or from the **User Groups** drop-down menu, select the user group that applies.

   Once you have created a vacancy from a post you have created, all the details will pull through into the vacancy. These details cannot be amended once the vacancy is added so ensure they are correct whilst still editing the post. However additional vacancy information can be changed. For example **start date** and **target date**.

10. Click **Save** to finish. The page refreshes with new tabs at under the vacancy details.

    The vacancy will now be open but the advert is not yet live. This can be managed within the **Advert** tab below.

Candidates

The **All Candidates** section allows you to view all **Candidates**, **Application Applications for Approval** and **Expiring Candidate** information.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **All Candidates**. The **Candidates** page is displayed.
3. Select the tab you require.

Candidates

The **Candidates** tab displays all candidates who have applied for roles within the Trust.

The **Shortlisted Candidates** section displays all candidates whose applications have been approved by applicant approvers.

The **Application Received Candidates** section displays all candidates who have not yet been approved by applicant approvers.

The **Unsuccessful Candidates** section displays all candidates that have been rejected.

Click the **View Candidates without Recruitment Process Stage** button to view candidates who have not yet been processed.

Click the pencil icon to edit a candidate's profile. All changes will appear within the **Audit Trail**.

Applications

The Applications tab displays all **Unapproved Applications** and **Rejected Applications**.

Unapproved Applications are applications that have not yet been approved by the Approval panel.

Click **+ Approve selected applications** to approve or **x Reject selected applications** to reject the application.

Rejected Applications are applications that have been rejected by the Approval Panel.

Click **View Application without a continuous link to a Candidate Profile** to view applicants without a link to a Candidate Profile.

Applications For Approval

This tab displays all applicants who have applied through the EPM Connect Candidate Portal and require your approval prior to be shortlisted.

To view information about a particular applicant, click the eye icon.

Expiring

This tab shows all candidates that are older than 5 months and should be considered for deletion if their data is no longer required.

Talent Pools

Candidates who have applied can be invited to join your Talent Pool. This is really useful for high-quality candidates that have not been successful as it allows you to notify them of future roles and remain in contact, with the aim to encourage them to apply for future roles.

Talent Pools candidates can be managed within the **Talent Pool** section of the Recruitment module.

1. On the left-hand side of the system window, select **Recruitment**. A list of further menu options are displayed.
2. Select **Talent Pool**. The **Talent Pool** page is displayed.
3. Select the relevant tab you require. The table can be filtered using the magnifying glasses or sorted using the column headings.

   Candidates: Displays all the candidates within your talent pool.

   Confirmation Emails Sent: Displays all emails sent to candidates inviting them to join your talent pool, the date sent, answer status and the date the answer was received on.

   Vacancy Emails Sent: Displays all emails sent to candidates invited to join a vacancy in the talent pool.

   Vacancy Approvals: Displays all candidates that failed a killer question/s while applying for a vacancy from talent pool email. Use the action icon to see, approve or reject a candidate's application.

   Applicants: Displays all candidate portal users that requested to join the talent pool.

   Applicant Approvals: Displays all candidate portal users that requested to join the talent pool and are still awaiting approval. Use the action icon to see, approve or reject a candidate's application.

Settings

See **Recruitment Module Settings Guide** to view the full guide.