



Managers' Recruitment and Onboarding Task List

1| Managing Your Vacancy

- ❖ Upload vacancy to Trac
- ❖ Contact all approvers to review request
- ❖ Review advert details once vacancy is live
- ❖ Review applications (following policy)
- ❖ Plan shortlisting and interview dates
- ❖ Arrange cover if absent (delegate access can be requested)

2| Shortlisting & Interviews

- ❖ Complete shortlisting within 1 week
- ❖ Set up interviews on TRAC
- ❖ Interview details: Location, contact, special instructions etc
- ❖ Contact applicants with interview outcome (provide feedback)
- ❖ Update TRAC with interview outcomes (successful/reject/DNA)
- ❖ Retain interview notes for 12 months for all candidates

3| Conditional Offer of Employment

- ❖ Monitor pre-employment check progress on TRAC
- ❖ Review references in a timely manner
- ❖ Support decisions on continuing or withdrawing offers
- ❖ Provisionally plan start date and onboarding
- ❖ Agree start date with recruitment in line with induction
- ❖ Respond to recruitment queries or delays
- ❖ Understand required checks ([NHS Pre-employment checks](#))
- ❖ Complete risk assessments if DBS concerns arise
- ❖ Maintain contact and engagement with the candidate
- ❖ Confirm pre-employment checks are complete before start date is set

4| Start Date & Onboarding

- ❖ Hire candidate onto ESR ([before payroll cut-off](#))
- ❖ Check hire workflow status for errors/delays
- ❖ Ensure Occupational Health support is in place
- ❖ Prepare new starter requirements (if needed):
 - Uniform request
 - ID badge & parking
 - IT account/email & systems access
 - Workstation equipment
 - Smartcard access
- ❖ Check roster includes new starter
- ❖ Create training plan
- ❖ Arrange first week training / buddy support
- ❖ Plan local induction
- ❖ Add to team meetings, mailing lists & comms channels
- ❖ Ensure access to policies, SOPs & clinical systems guides
- ❖ Complete new starter risk assessments (DSE/Ergonomic workstation assessment)
- ❖ Review job description, objectives & expectations early on

Quick Links - New Starter Actions

- [IT/Cerner access](#)
- [Uniform Request](#)
- [ID Badge Request](#)
- [How to Order a Parking Fob](#)
- [Smart Card Access](#)

Guidance for Managers

- [Safe Recruitment & Selection Policy](#)
- [Safe Employment Policy](#)
- [Annual Leave Policy](#)
- [Trac Support Guide](#)
- [Recruitment Journey - Recruiting Manager](#)