Recruitment and Onboarding Process and Workflow

Sept 2025

1.   Introduction

The Mercian Trust are committed to adhering to an efficient, fair and transparent recruitment and selection process that is in line with the Equality Act 2020 and safer recruitment practices.

As such, we have provided a guide to the recruitment process. This is to ensure all individuals involved in recruitment activities, understand their role and timescales for a successful recruitment.

Our aim is to ensure that all candidates have a positive experience when they apply for a role within the Mercian Trust.

This workflow has been produced to ensure that it supports the Safeguarding policy and Keeping Children Safe in Education (KCSIE).
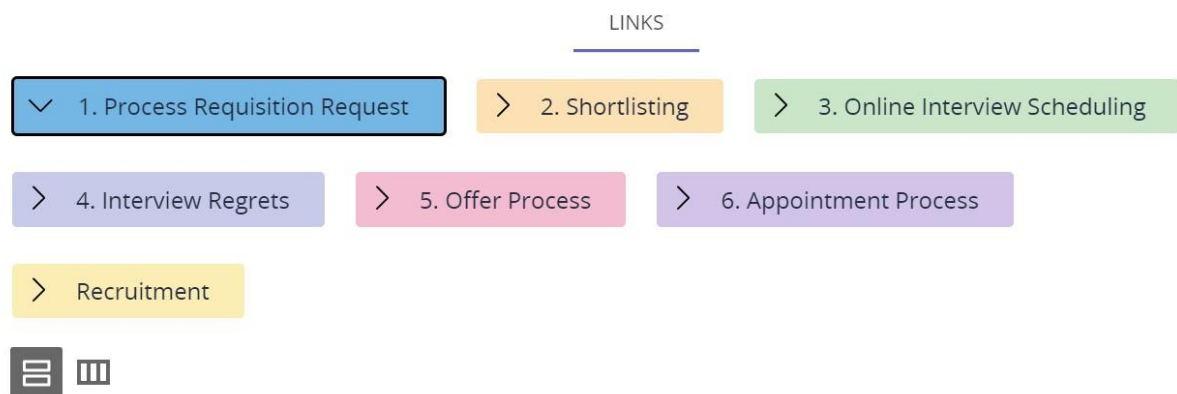
This process applies to all staff who are employed directly by the Trust, including those on casual and fixed term contracts.

Please note this is a live document and updated regularly. Any updates will be reflected through the live version available on the Mercian Portal. Any changes made to this document will be notified to leaders through the regular Central Leadership Team and Operational Leadership Team meetings.

2.   Overview via iTrent of the recruitment process

Below in Fig 1 is a summary of the steps we currently follow in iTrent to complete each stage of the recruitment process.

Fig 1

LINKS

| ∨ 1. Process Requisition Request | ❯ 2. Shortlisting | ❯ 3. Online Interview Scheduling |

| ❯ 4. Interview Regrets | ❯ 5. Offer Process | ❯ 6. Appointment Process |

| ❯ Recruitment |

Step 1   The school alerts the Business Manager that they have a vacancy.

Step 2   A Requisition is raised in iTrent by the Headteacher's PA or the school's Business Manager.

Step 3   Headteacher's PA or Business Manager attach the job description and person specification to the recruitment requisition at Step 12 on i-trent. It is important when submitting the requisition to ensure there is an updated job description and person specification ready as this will be required to advertise the vacancy and if not ready is likely to result in delays to the role being advertised.

Step 4a   (*new roles only*) - Approval by Headteacher, Business Services Director, HR Advisor and Trust Executive. All approvals should be completed within 48 hours of the requisition being submitted.

Step 4b   (*existing/replacement roles*) - Approval by Headteacher, Business Services Director and HR Advisor. All approvals should be completed within 48 hours of the requisition being raised.

Step 5   HR Administrator to place advert within 1 working day assuming the job description and all the relevant dates have been provided along with the recruitment requisition. Where information is not provided, it will result in a delay to the advert.

Step 6   Recruitment tracker updated to 'live' status by HR Administrator, followed by ongoing updates to the recruiting manager as recruitment progresses.

Step 7   When the advert closes either the Headteacher's PA can pull off the applications or they can be sent to the recruiting manager directly by the HR Administrator.

Step 8   The HR Administrator will keep candidates informed with progress of the recruitment process and notify them if there are any unexpected delays.

Step 9   Shortlisting must be conducted by 2 panel members **(one of which must be Safer Recruitment trained)**. Schools can access the short-listing template and interview questions template in the central area unless they choose to use their own, but this must include the mandatory questions contained in the Trust's template. These can be found in the 'Recruitment- Schools and Central Teams' Teams Channel.

Step 10   The schools should return their short-listing matrix to the HR Administrator via the dedicated recruitment email address: recruitment@merciantrust.org.uk

Step 11   The school will provide details of the lesson observation topic/task, (if applicable).

Step 12   HR Administrators will notify the successfully shortlisted candidates via email with their interview details via standard template email. **Candidates must have at least 5 days' notice of the interview.** This can be shorter if the interview date was notified as part of the initial advert but the minimum notice to candidates will be 72 hours.

Step 13   The safeguarding self-declaration form will be sent to the short-listed candidates at this stage via iTrent.

Step 14   Regret at shortlisting emails will be sent to unsuccessful candidates.

Step 15   As part of the recruitment and onboarding process for Primary Education, the HR Administrator will be responsible for sending a second self-declaration form specifically related to Childcare to all new recruits joining Rushall, Oakwood, and New Leaf.

Step 16   Employment History Checks and Online checks are completed, and references are requested (where the candidate has provided permission). Once the information is back, this is documented on a "pre interview" matrix confirming the outcome of the checks which is sent to the interview panel so they can discuss and explore any concerns with the individual at interview. Please be aware that the Trust do not offer work visas or sponsorships if these are required by the individual, in these cases please consult HR.

Step 17   Any references received are sent to the panel prior to interview. If there is a concern raised by one of the references this is indicated in the pre-interview matrix. This should be checked prior to interview so the panel are aware of any updates to the pre-interview matrix.

Step 18   During the interview, the panel will discuss *any* positive disclosures, concerning references or concerning social media check with the candidate. Responses to these should be carefully noted by the interview panel. Panel members must be aware that interview notes may be shared with the candidate if they make a Subject Access Request.

Step 19   Candidates must provide Right to Work (RTW) documents (refer to HR for further information), proof of their address plus one further document as proof of ID and evidence of their Qualifications e.g. original certificates, where qualifications are essential to the role, **so the interview panel can verify and record as part of the interview**. If a work permit is required, then a Share Code should be obtained from the candidate and provided to the HR Administrator via recruitment@merciantrust.org.uk who will conduct the online RTW check.

Step 20   Interviews are held, and each panel member scores the candidates against the interview questions. Based on this, the panel will agree who the successful candidate is and indicate this on the scoring matrix, including the reasons for their decision.

Step 21   Based on the recommendation of the interview panel, the Recruiting Manager will make a verbal **conditional** offer of employment subject to the normal conditions relating to safer recruitment checks. Any offer made must be in line with the terms and conditions of the role as approved on the recruitment requisition.

Step 22   Recruiting Manager or Headteacher's PA will complete the Successful Candidate Form (for externally appointed candidates e.g. those that are not currently employed by the Trust) or the Internal Transfer Form (for internally appointed candidates). Links to the forms can be found in the Mercian HR Portal. Any completed forms must be in line with the terms and conditions approved on the recruitment requisition, any that don't match will be rejected and a new form will need to be submitted.

Step 23   On receipt of the approved Successful Candidate or Internal Transfer Form a written conditional offer, will be sent by the HR Administrator, within 1 working day of receiving the approved Form.

Step 24   It is the recruiting managers responsibility to provide verbal outcomes of the interview process to unsuccessful candidates which will be followed up with "regret after interview letters" being sent by HR.

Step 25   It is the recruiting manager's responsibility to provide feedback to unsuccessful candidates if requested, therefore any interview notes should be retained within the school for a period of 6 months, after which they should be confidentially destroyed.

4.   Onboarding Process steps

Step 1   On receipt of the approved Successful Candidate Form, the HR Administrator will ensure all Right to Work, ID and qualification documents have been received from the Recruiting Manager and are acceptable and in line with the legal and statutory documents required for proof of Right to Work and to enable all safer recruitment checks to be completed.

Step 2   The HR Administrator will send the successful candidate a link to the onboarding process and flow via i-trent, so the successful candidate can commence completion.

Step 3   The HR Administrator, will monitor that the candidates has completed all forms correctly and chase where these are not completed within the assigned timeframe.

Step 4   When an HR Administrator is handling an individual who holds both a work permit and a Biometric Residence Permit (BRP), they must first review the BRP to identify any restrictions on the type of work the individual is allowed to do. They should then assess whether the job role being offered complies with those restrictions. After confirming this, the HR Administrator must request a share code and date of birth from the applicant to carry out an online Right to Work check. Once the share code is received, the HR Administrator should verify it using the official government portal, ensuring that the information displayed—such as the individual's name, work permissions, and expiry date—matches the details provided in the application. After successful verification, the HR Administrator must save and upload the Right to Work check result to both the SCR (Single Central Record) under the Right to Work section and the individual's iTrent personnel file.

Step 5   It is the responsibility of the HR Administrator to ensure that the SCR is updated, and **safer recruitment checks are completed prior to someone starting**.

Step 6   HR Advisors will check the completed Health Questionnaire. If anything of concern is noted, the HR Advisor will make a referral to Occupational Health and advise on any recommendations made by Occupational Health following the referral.

Step 7   If any issues or concerns are raised by anything contained within the safer recruitment checks, the HR Administrator will flag this to the HR Advisor. The HR Advisor will then discuss with the recruiting manager and Headteacher.

Step 8   If there is a positive disclosure, the HR Advisor, with the Headteacher or appropriate central MAT Director, will carry out a risk assessment using the Positive Disclosure Risk Assessment Form.

Step 9   Based on the outcome of the risk assessment, if an offer is to be withdrawn, this must be approved by the Headteacher and People Manager. If an offer, is to continue with a positive disclosure, this must be approved by the Headteacher and Director of People and Organisation Development.

Step 10   Once all safer recruitment checks are completed, the HR Administrator will confirm this with the school, confirm the successful candidates start date and issue the Written Statement of Employment Particulars to candidates. **It should be noted that it takes around 2 – 3 weeks to complete all safer recruitment checks.**

Step 11   The HR Administrator will then move the successful candidate to a new starter on payroll via ready to appoint on i-trent.

Step 12   The HR Administrator will notify the school and the HR Advisor if one reference or the DBS is outstanding by the start date, so they can complete a risk assessment, which must be approved by the People Manager, if the individual will be starting ahead of all recruitment checks being completed. **Where this is the case, under KCSIE, the Trust and our schools are required to ensure that a Child Barred List check is completed and the individual staff member is appropriately supervised before the individual attends any of the Trust's schools, offices or sites.**

SUCCESSFUL CANDIDATES WILL NOT BE ABLE TO START UNLESS ALL SAFER RECRUITMENT CHECKS ARE SATISFACTORILY COMPLETED OR A RISK ASSESSMENT HAS BEEN APPROVED AND A MEMBER OF THE HR TEAM HAS CONFIRMED AN INDIVIDUAL CAN COMMENCE EMPLOYMENT.

Step 13   One week before the start date, the HR Administrator will add new starter details to the schools MIS system so an email account can be created by the IT support team.

Step 14   One week before start date, the HR Administrator will send a reminder to relevant school of new starter details.

Step 15   On the successful candidates **first day of work**, the Headteacher's PA must ensure the original DBS document has been seen and verified by checking the DBS certificate number and issue date of the original enhanced DBS certificate. It is the Headteacher's PA's responsibility to ensure the SCR is updated on the first day. If it is a positive disclosure that the Trust has not previously been made aware of (convictions, penalties, fines, imprisonment, etc), the Headteacher's PA should notify the Headteacher and contact their designated HR Advisor as a matter of urgency so a risk assessment can be carried out. **The individual must not remain on site whilst the risk assessment process is carried out.**

Step 16   If a candidate does not start work, the Headteacher's PA must inform HR and Payroll immediately.

Step 17   The HR Administrator must ensure all documentation is received, signed and added to the successful candidates i-trent personnel record.