

Screening Applicants Job Aid

Purpose: After creating a posting, screening applicants is an important step in determining the most qualified applicants to interview. All applicants shall be given equal consideration. The purpose of this job aid is to better understand the recommended process of screening and reviewing applications:

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Note: This guide is to be used by the Hiring Manager to **functionally** determine the rating of applicants. Although it is geared toward assisting the Hiring Manager through the rating process, the guide may also be used for a search committee, if one has been established. To find how to view an applicant’s materials, letters of recommendation and other documents, please reference [Reviewing Applicant’s Materials Job Aid](#).

To update the applicant rating and status in PeopleAdmin7, please reference the [Rating and Routing Applicants Job Aid](#).

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Step 1. Determine Timing of Applicant Evaluation

Hiring Managers are encouraged to review applications throughout the posting period. This practice allows for timely determination of ratings and monitoring of recruitment efforts.

Guaranteed Consideration Date

The only time an applicant will not be assigned a or a final rating will be when an application has been submitted after the guaranteed consideration date and was **NOT** reviewed. For example, a posting has a guaranteed consideration date of 07/01 but the employing department has asked to collect online applications until 08/01. If on 07/15, the employing department determines that they have a sufficient pool, then all applicants who applied through 07/15 shall be reviewed and assigned a final rating. Applicants who applied on 07/16 or after shall not be reviewed and they can be changed to the status of “Not Reviewed, Rec’d after Consideration Date”.

Please Note

- Using the example above, if a Hiring Manager (and/or Search Committee Member) opens/reviews the materials of an applicant who applied after 7/15, then all applications shall be rated up to the date for which that particular applicant applied.

Expert Advice

- Ensure rationales for applicant final ratings are business related. If you are unsure if your rationales are appropriate or can be supported, please contact your Human Resource Liaison, University Human Resources Recruitment, or the Office of Equal Opportunity.
- Schedule/hold dates on the Hiring Manager’s calendars for each step of the process such as: review and discussion of applications, rating, interviewing, and final selection.

Step 2. Understand the Position Requirements

Before beginning the applicant evaluation, the Hiring Manager shall define what will be considered as ‘related experience’, and/or ‘related degree field’, as applicable. It is important the Hiring Manager ensures the same evaluation criteria is applied to all applicants throughout the evaluation process.

Qualified/Not-Qualified

Position requirements are composed of different fields which may depend upon the position type. Those fields are outlined below with the associated position type:

Faculty must meet:	<ul style="list-style-type: none"> <input type="checkbox"/> Required Education and Experience <input type="checkbox"/> Required Licensure(s)/Certification(s)
P&S must meet:	<ul style="list-style-type: none"> <input type="checkbox"/> Required Education and Experience <input type="checkbox"/> Supplemental Required Education and Experience <input type="checkbox"/> Required Licensure(s)/Certification(s)
Merit must meet:	<ul style="list-style-type: none"> <input type="checkbox"/> Required Qualifications <input type="checkbox"/> Special Qualifications <input type="checkbox"/> Required Licensure(s)/Certification(s)

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Step 3. Determine “Qualified” or “Not Qualified”

The Hiring Manager will determine “Qualified” or “Not Qualified” based on the content of the application materials submitted by each applicant.

If an applicant does not meet all of the position requirements, that applicant shall be considered “Not Qualified”. The Posting Admin would then proceed with rating the applicant as “Not Qualified”. Then, he/she will take action to move the applicant to a status of “Does not Meet” as seen below and corresponding reason code which best describes the unmet requirements. The reason code provides more information as to why an applicant has been determined “Not Qualified”. The table below illustrates these status options along with corresponding reason code options.

Applicant Status – “Not Qualified”*	Reason Code(s)
Does not Meet Required Education and Experience	<input type="checkbox"/> Does not meet education requirement <input type="checkbox"/> Does not meet experience requirement <input type="checkbox"/> Does not meet license/certification requirement
Does not Meet Required Qualifications - Merit only	<input type="checkbox"/> Does not possess required knowledge, skill or ability <input type="checkbox"/> Does not meet required experience or education/training <input type="checkbox"/> Does not meet license/certification requirement
<i>(*)Once applicants are set to Does Not Meet Required Education and Experience they will be able to see on the applicant portal that they are no longer under consideration for the position.</i>	

Please Note

- All applicants shall be given equal consideration.
- Years of experience shall be equivalent to full time work to satisfy the required number of years (e.g., 10 years of half time work experience would only equal 5 years of full time work experience).
- Student experience is credited at half-time during the academic year.
- If a position requires a completed degree, applicants shall have the degree fulfilled by the proposed start date.

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Step 4. Understand the Preferred Rating Criteria

The Hiring Manager will use the following fields from within the posting to determine the ratings for all qualified candidates:

Faculty and P&S:	<input type="checkbox"/> Preferred Education and Experience <input type="checkbox"/> Preferred Licensure(s)/Certification(s)
Merit:	<input type="checkbox"/> Preferred Qualifications <input type="checkbox"/> Preferred Licensure(s)/Certification(s)

Step 5. Assign a Numerical Scale for Preferred Rating Criteria

After identifying the requirements, the Hiring Manager may assign a scale for each of the Preferred Education & Experience/Qualifications. The scale can be as simple as entering a '1' if the applicant met the listed Preferred Education & Experience or entering '0' if the applicant did not meet the listed Preferred Education & Experience.

Another method would be assigning a sliding scale for each of the Preferred Education & Experience/Qualifications. (e.g., scale 0-3; '0' did not meet, '3' = met to the highest degree).

Step 6. Determine Rating of Qualified Applicants

If an applicant meets all of the requirements for the position as noted in Step 2 above, the Hiring Manager will proceed in determining values and arrive at a final rating. As an example, the Hiring Manager shall assign the applicants from the optional collection tool into Qualified 0 - Qualified 5 groupings.

It is recommended the Hiring Manager uses the total values to identify groups. Each group will be assigned a final rating as illustrated in the example below.

Sample Rating Key:	
<i>Total Preferred Education/Experience</i>	<i>Final Rating</i>
0-2	Q0
3-5	Q1
6-8	Q2
9-11	Q3
12-14	Q4
15-17	Q5

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Common Mistakes To Avoid	
Averaging	The Hiring Manager may assign a scale of 0-3 for each preferred qualification/education and experience met by the applicant and then average the total. This can lead to decimals which can cause complications in the rating which shall be a whole number. It is recommended that departments add up all of the s to obtain a total and then rate the group with the highest s as Qualified 5, the next group Qualified 4, and so on.
Personal Knowledge	Do not allow personal knowledge of an applicant to affect the evaluation of written materials and/or numerical s/final rating.
Rating applicants that do not meet the requirements	An applicant who meets and exceeds all of your preferred qualifications/education and experience, but doesn't meet all of the requirements should be rated as "Not Qualified".
"Does Not Meet Required Education and Experience" as a 'catch all'	Do not change a qualified applicant's status to "Does Not Meet Required Qualifications/Education and Experience" because you are not interested in interviewing them. An applicant who meets the requirements shall be considered qualified.

Step 7. Manage Qualified Applicants

After determining a final rating, the Hiring Manager has three options for each applicant:

1. Route the Applicant by changing the workflow state to "Flagged/Request for interview"
2. Update Applicant Workflow State to "Not Interviewed"
3. Leave a pool of applicants (and update applicant status later)

Route the Applicant to "Flagged/Request for interview"

Applicants of the same rating should be given equal consideration. For example, if one Q4 is interviewed, all Q4's should be interviewed. If not, that applicant's workflow state should be changed to "Not Interviewed" and a reason code shall be selected.

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Update Applicant Status to “Not Interviewed”

If the Hiring Manager has no interest in interviewing applicants of the lowest ratings, he/she may update the workflow state of those applicants to “Not Interviewed”. The table below shows examples of the reason codes for the “Not Interviewed” status options:

Applicant Status* – Not Interviewed	Reason Code(s)
Not Interviewed	<ul style="list-style-type: none"> <input type="checkbox"/> Applicant withdrew application <input type="checkbox"/> Experience less desirable/relevant <input type="checkbox"/> Education less desirable <input type="checkbox"/> Skill set does not match needs of the position <input type="checkbox"/> Conflict of Interest <input type="checkbox"/> Quality of professional references <input type="checkbox"/> Inaccurate application <input type="checkbox"/> No response to email or call <input type="checkbox"/> Not available for the required hours of work <input type="checkbox"/> Application incomplete or late <input type="checkbox"/> Employment History <input type="checkbox"/> Did not show for interview

()Once applicants are set to “Not Interviewed” and provided with a “Reason Code”, they will be able to see on the applicant portal that they are no longer under consideration for the position.*

Leave a pool of applicants (and update applicant status later)

If the Hiring Manager wants to keep applicants under consideration, but not request interview approval, he/she should keep the applicants at the “Rate Applicant” workflow state. However, the Hiring Manager shall remember to move the remaining applicants to a final status after confirming the acceptance of the offer.

Expert Advice

- The Hiring Manager may consider applicants in ‘tiers’. She/he may not want to further consider those rated as Q1 and Q2, and may move them to a final workflow state in which applicants will see that they are no longer under consideration. However, there may be a First Tier group (i.e. Q5’s and Q4’s) and a Second Tier group (i.e. Q3’s) which the Hiring Manager would consider for the position. If so, she/he may wish to submit those in the First Tier for interview and hold the Second Tier at the “Rate Applicant” workflow state.

Alternatively, the Hiring Manager may wish to request interview approval of both tiers at the same time but only schedule and hold the Tier 1 interviews first. Depending on the success of Tier 1 interviews, Tier 2 candidates may not be interviewed. If the Hiring Manager feels it would be more efficient to request approval of both tiers at once, she/he should add a note such as ‘Tier 2’ in the Applicant history of the applicants who are considered in that group. It should be understood that all applicants in the Tier 2 group will either be changed to “Not Interviewed” or will be interviewed before a selection is made.

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Please Note

- For a comprehensive review all of applicants, view the Applicant List Report found under the report tab located within the posting, please reference the [Reviewing Applicant Reports Quick Reference Guide](#).

Step 8. Move Applicants to a Final Status

To update applicant final ratings and statuses in PeopleAdmin7, please reference the [Rating and Routing Applicants Job Aid](#).

Step 9. Applicant View and Emails

When an applicant successfully submits an application in the hiring system, they have the ability to monitor the status of the application submitted. The chart below illustrates what an applicant sees when final statuses/action labels are chosen.

What Applicant's See	Action Label(s)
No Longer Under Consideration	<ul style="list-style-type: none"> <input type="checkbox"/> Application Withdrawn <input type="checkbox"/> Does Not Meet Required Education and Experience <input type="checkbox"/> Does Not Meet Required Qualifications – Merit Only <input type="checkbox"/> Not Reviewed – Rec'd After consideration date <input type="checkbox"/> Interviewed, Not Hired <input type="checkbox"/> Not Interviewed <input type="checkbox"/> Not Interviewed – Faculty/Other Only <input type="checkbox"/> System Det'd Did Not Meet min Quals <input type="checkbox"/> Not Certified – Merit Only <input type="checkbox"/> UHR – Not approved for interview
Under Review	<ul style="list-style-type: none"> <input type="checkbox"/> Under Review by Posting Admin <input type="checkbox"/> Flagged for Interview (at any level) <input type="checkbox"/> Selected for Hire