HRIS: Selecting candidates – shortlisting packs and priority candidate screening

HUMAN RESOURCES
UNIVERSITY OF OXFORD

Part of the Selecting Candidates process, this tutorial will explain the system steps you need to complete when your vacancy advertising closes and what you need to prepare for shortlisting. This covers the following:

- Advertise, apply, deadline

- View all applicants

- Generate applications and merge

- Screen for priority candidates

- Shortlisting pack

- Private questions report screening

Advertise, apply, deadline

The story so far

The following timeline depicts the activities relating to the advertising and applying stage of recruitment. The dates are for illustrative purposes only.

Before 1 July : Up to and including the advert publishing date

By this stage you will have:

- prepared the vacancy for advertising

- received approval for the advert

- publish the vacancy for advertising

From 1 Jul to 31 Aug : Vacancy advertised

During this time applicants apply. Whilst that is happening you can:

- record the selection panel

- record where the vacancy was advertised

- add completed vacancy events

- manage any applicant queries, such as changes to their personal details or application

31 Aug and after : Vacancy deadline

The advertising has come to an end. Now you can:

- view the final list of applicants

- generate shortlisting packs

- download the shortlisting form

- screen for priority candidates

- send packs to shortlisting panel

This guidance covers the activities post vacancy deadline.

- a step by step guide on the purpose of *Vacancy Events* in the system and how to update them

- a useful guide on how to track and record the locations of all advertisements and the associated costs

- a step by step guide on how to record the panel members for shortlisting and interviews

- a guide on how to manage applicant queries, including changing their personal details such as email, and how to manage applicants who apply late

View all applicants

You can see your full list of applicants from the *View Applicants* screen, as follows:

Step 1: Select the **Vacancies** tab from the **Recruitment Dashboard.** Either search or filter to locate your vacancy, then click on the **Actions** button on your vacancy.

Step 2: From the Actions menu select View Applicants to see a list of all applicants who have applied and their completed applications.
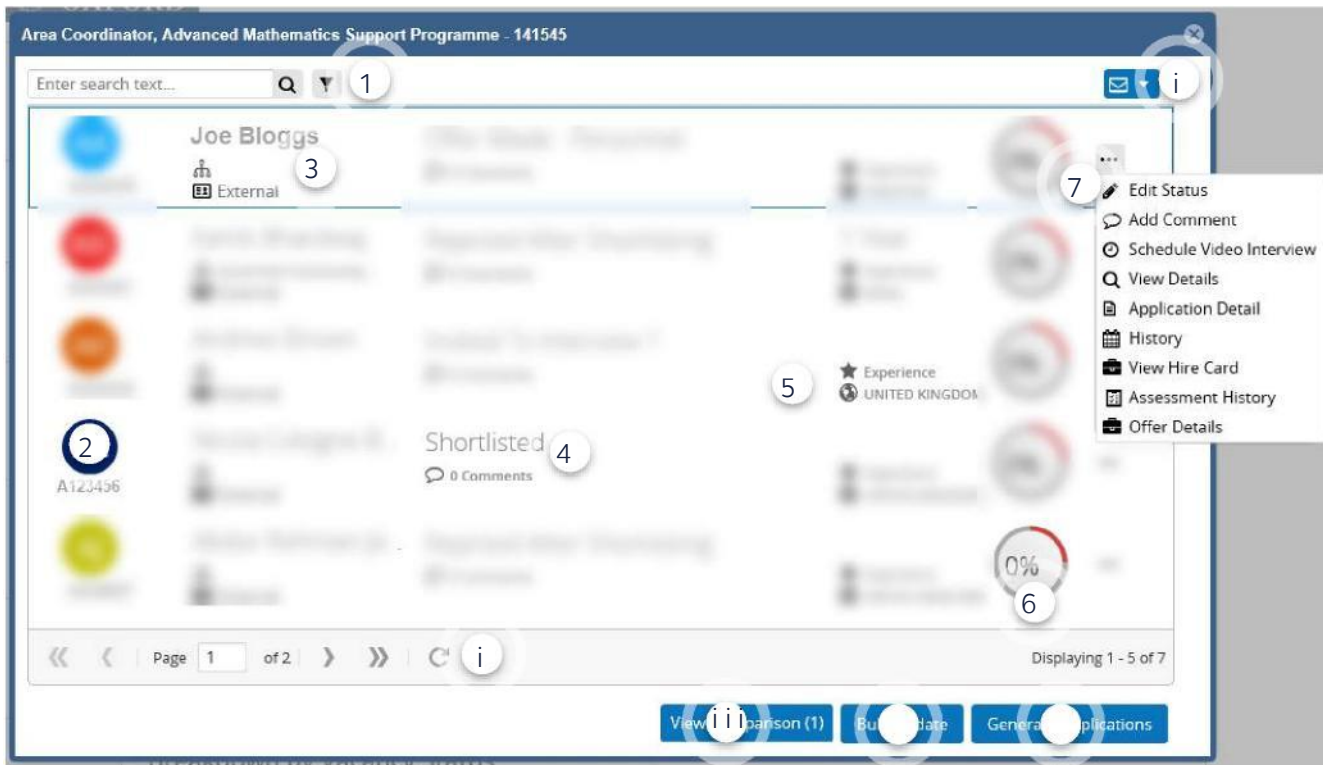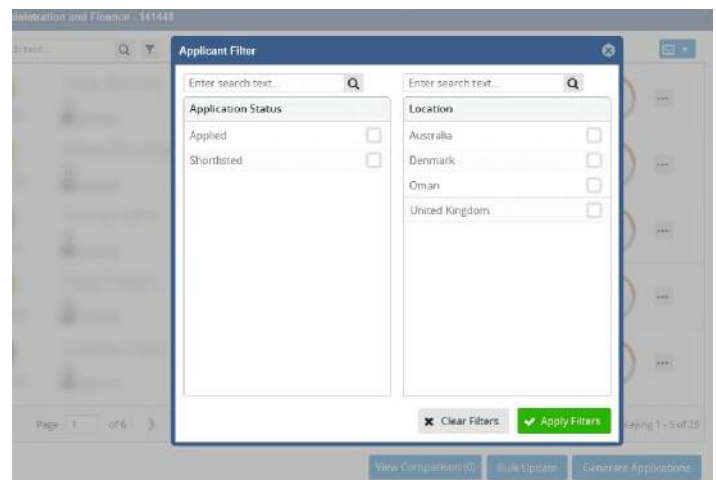

1. Applicant search and filter

You can search for an applicant with:

- part or all of applicant name
- part or all of the applicant id
- applicant status

You can also use a filter, see image on right

2. Applicant ID

Each applicant is given a unique ID number (7 characters long starting with an A) when they register to apply.

3. Applicant name

The applicant's first and last name appears here, along with whether they are an internal or external applicant, and if internal their current organisational hierarchy.

4. Applicant status

You can see the status of each applicant in this column and also any comments associated with that applicant.

5. Not in use – applicant overview

6. Not in use – assessment score

7. Applicant menu

Selecting the three dots opens a menu window. Below is a list of the functions you can do from here:

- change an individual applicant status through **Edit Status**

- **Add Comment**

- **View Details** allows you to manage an applicant's personal details such as their personal contact information

- see their completed application form in another browser window via **Application Detail**

- **History** shows their progress throughout the recruitment process

- View any offers made via **Offer Details**

Not in use are **Schedule Video Interview, View Hire Card,** and **Assessment History**.

i. Page navigation

You can see how many pages the total list of applicants is displayed across. You can refresh, navigate by the arrows, and enter a specific page number.

On the left side is a total of number of applicants and how many are being displayed.

i. Correspondence generation
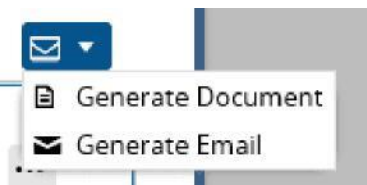
Generate documents or emails to send to applicants. Some of the types of correspondence:
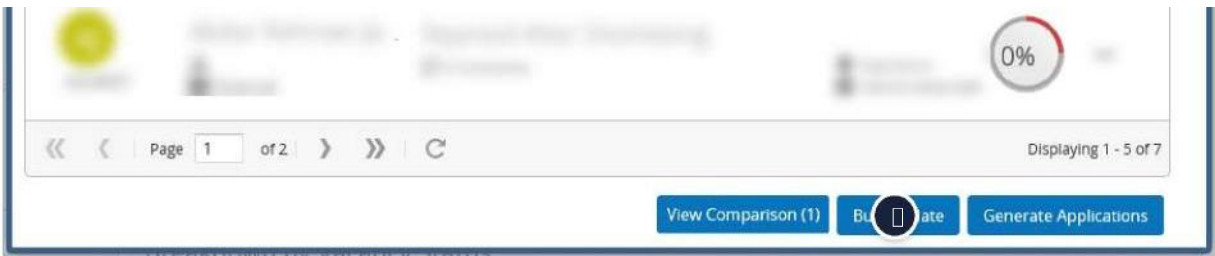
- Shortlisting form

- Invites to interview

- Rejections

- Forms eg University Card

i. View comparison – not in use

Its purpose is to select several applicants to compare:

- Status
- Qualification
- Experience
- Current Company
- Question rating (**not in use**)
- Interview score (**not in use**)
- Tag (**not in use**)

i. Bulk update

Recruitment Administrators can update a number of applicant statuses in bulk.

eg you have 12 applicants who have all been rejected post shortlisting, you can update their status to *Rejected After Shortlisting*.
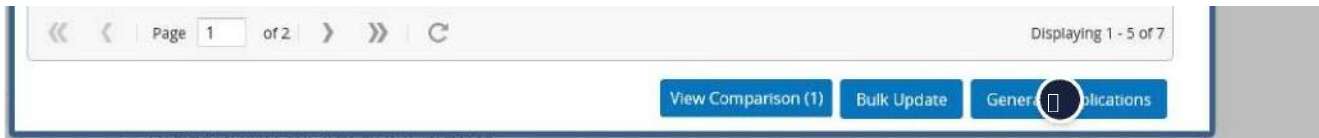
i. Generate applications

A Recruitment Administrator can filter by Applicant Status and then with the applications:

- generate
- merge
- view merged

Applicant menu – view details

Access the following by selecting **View Details** from the *Applicant menu* (via the **three dots**).

Applicant Details allows you to see and edit an applicant's personal details, eg contact details.	**Vacancy Detail** shows the details of this vacancy and other vacancies the applicant has applied for.
Referees contains information about the referees, their contact details, whether they can be contacted and the option to contact them through letter or email.	**Documents** is where you will find any documents that have been manually uploaded by the Recruitment Administrator.

View Details

A "How to" guide is available for the *View Details* screen. This covers information about the applicant, including how to make changes to their personal details.

Applicant Status

When an applicant applies their initial status will be recorded as *Applied*. See also [Recruitment statuses and events diagram](#) and [Recruitment Types, Statuses and Events](#) guide.

Generate applications and merge

Navigation
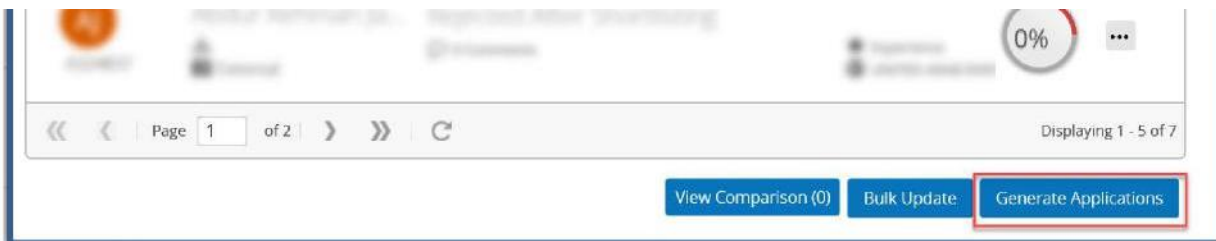
Select **Generate Applications** from the *View Applicants* screen

Generate Applications

Once selected a new window will open.

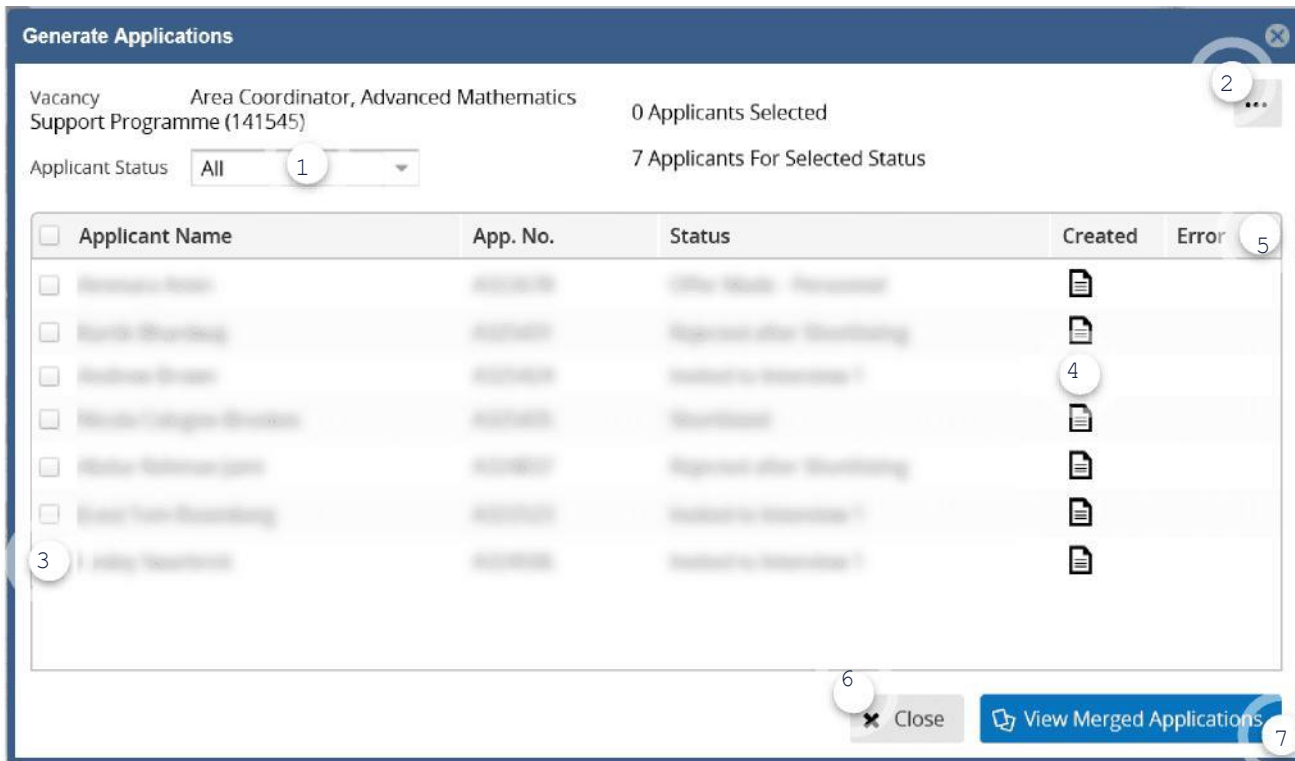## 1. Applicant status

You can use the drop down menu to select a particular applicant status. Once selected only applicants with that status will be displayed in the table below.

2. Three dot menu

This menu opens once you select the **three dots**. Here you can select applicants, generate applications, and merge them.

3. Select applicants

A tick box indicating the applicants you have selected. The box in the title row allows you to select or deselect all applicants with one click. Alternatively select one at a time if you just want a couple of the applicants.

4. Created column

Once an application has been generated the document icon will appear in the *Created* column. If you hover over the icon you can see the date and time it was generated.

5. Error column

An 'error' may appear in this column to highlight that there was an issue generating the full application.

6. Close

Clicking **Close** will exit the *Generate Applications* window. Alternatively you can click the small **x** in a circle top right corner of the window,

7. View merged applications

The **View Merged Applications** button will open an online PDF in another browser window. This PDF is all of the applicants' individual applications merged into the one PDF.
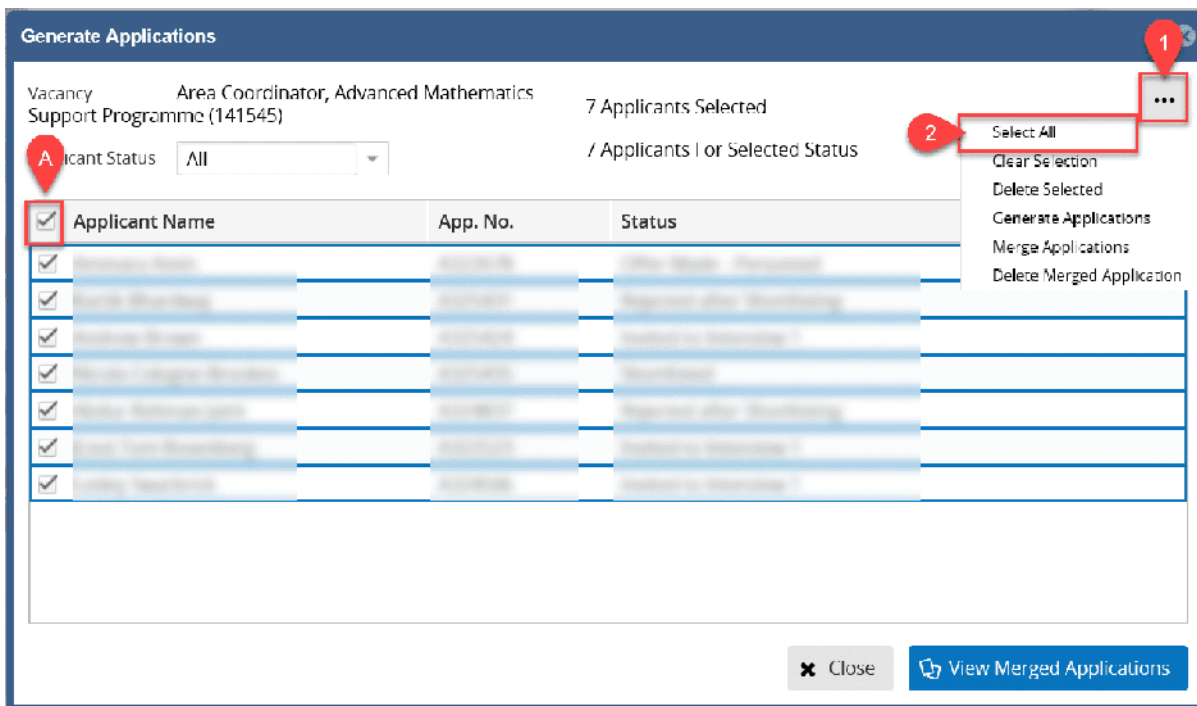
How to generate applications
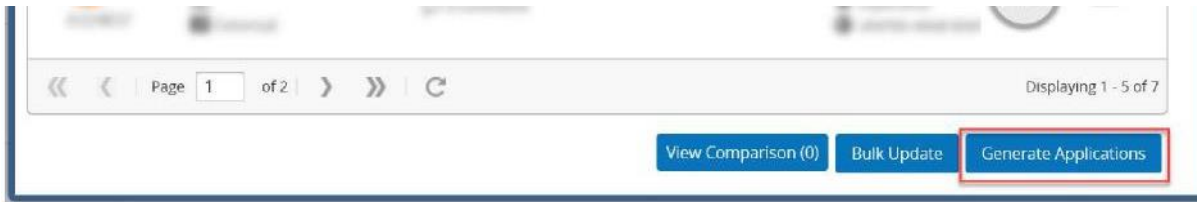
Before we can screen our applicants we need to generate their applications individually and then merge these into one single PDF pack.

Generating applications merges and converts their completed application form, completed questions, and any attached documents into one PDF document.

Step 1   Selecting applicants

Select the applicants' applications you wish to generate into an online PDF.

You can select all applicants by selecting the master tick box in the title row of the table. See area highlighted with an A on the image above. Alternatively you can click the **three dots** menu and then click **Select All**. Highlighted above with steps 1 and 2.

Or use the tick box per applicant line to select one or a few of the applicants if you wish to generate their applications only.

| Step 2 | Applicant Status– optional filter |
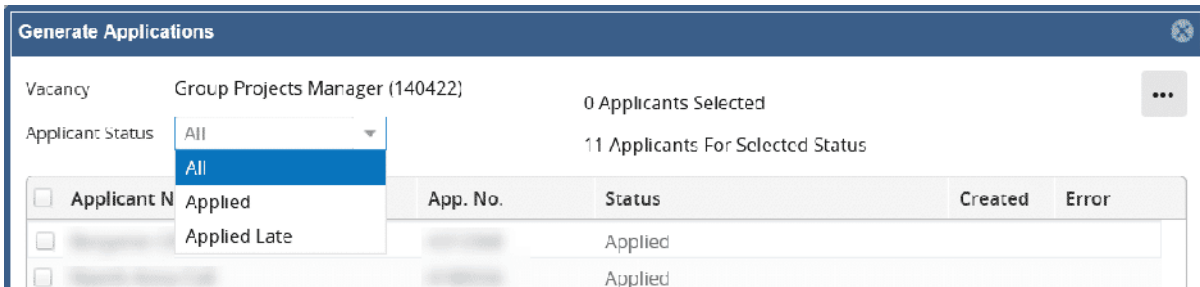
You can filter your applicant list further by selecting the **Applicant Status** drop down button.

Once filtered you could then use the options mentioned in the previous step to select your applicants.

| Step 3 | Generate applications |
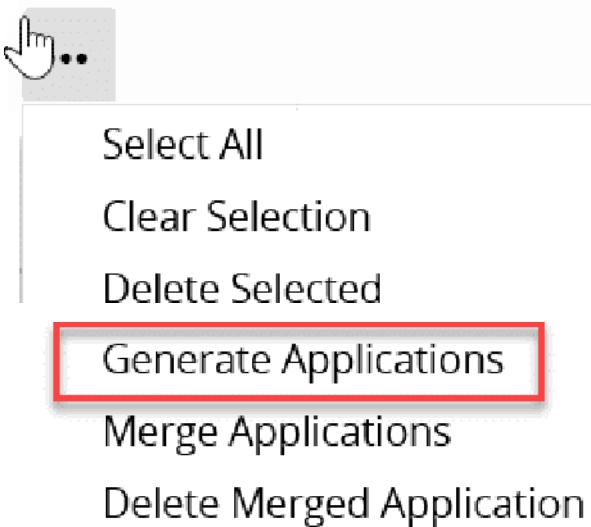
To generate the applications of the applicants selected you need to click on the **three dots**, and then select **Generate Applications**.

| Step 4 | Job Submitted |
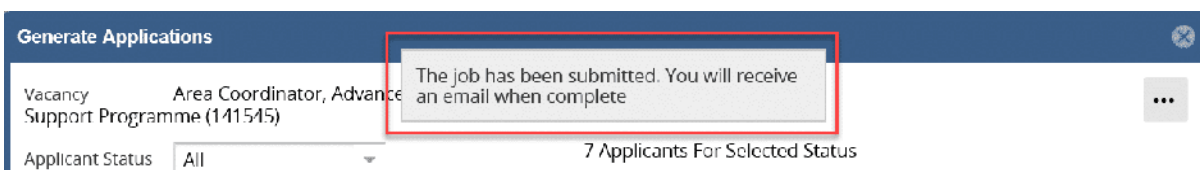
Next you should receive a notification letting you know that a job has been submitted, and that you will be notified via email once the applications have been generated.

Step 5   Email confirmation

When the applications have been generated you will receive an email.

Step 6   View application

Find your vacancy and navigate back to *Generate Applications*. A little document icon should appear in the *Created* column for the applicants selected.

Click on the **document icon** to open the generated application. It will open in a new browser window, and may require you to confirm that you trust the source.
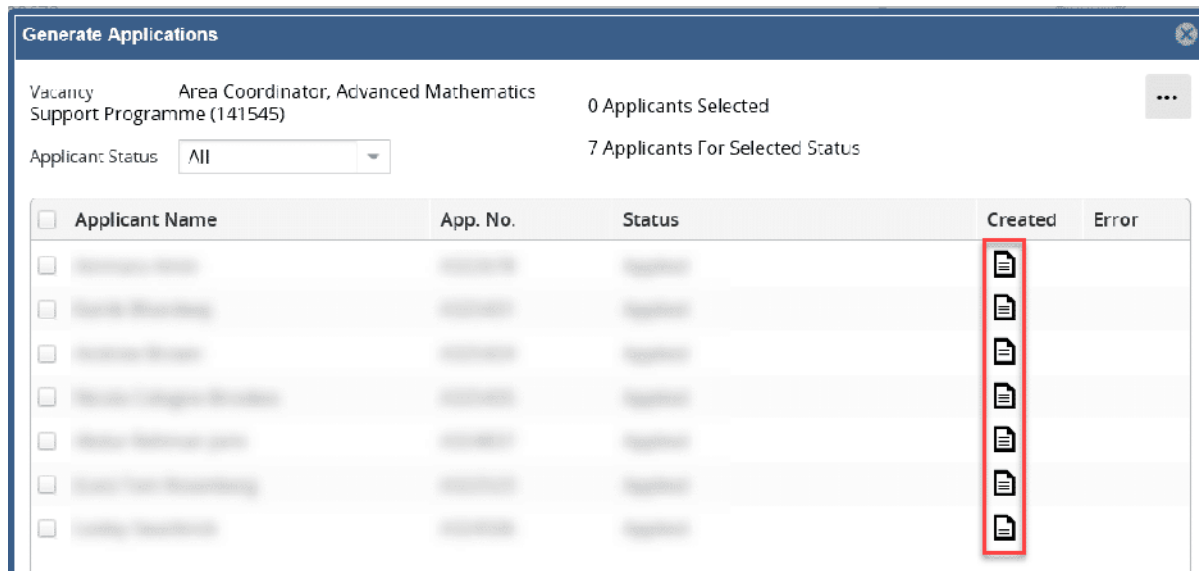
There is helpful information on browser alerts and managing browser settings on our HRIS website.

Step 7   Be aware of any errors

After the individual applications have generated, you MUST review the *Error* column for all of your applications.

If there is an issue with one of the individual packs, eg an applicant has password protected one of their documents, the PDF will still generate, BUT will omit that particular failed document.

Another common issue is that occasionally applicants attach zip files.

The only way for you to know if there is an issue, eg a missing document, is for you to review this *Error* column. If there are any issues always contact the HRIS Support Centre who will advise on each circumstance.

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Summary

To recap the main key steps are:

1.Select **Generate Applications**

2.Select your applicants using the tick box options or **three dots** menu and click on **Select All.**

3.Click the **three dots** and then click on **Generate Applications** to create the individual PDFs of their full application (ie including attached documents).

4.When you receive the email notification, return to CoreHR and navigate to the *View Applicants* screen of your vacancy.

5.Select the blue **Generate Applications** button to open.

6.The document icon will be visible for the applications generated, click the **icon** to open the PDF.
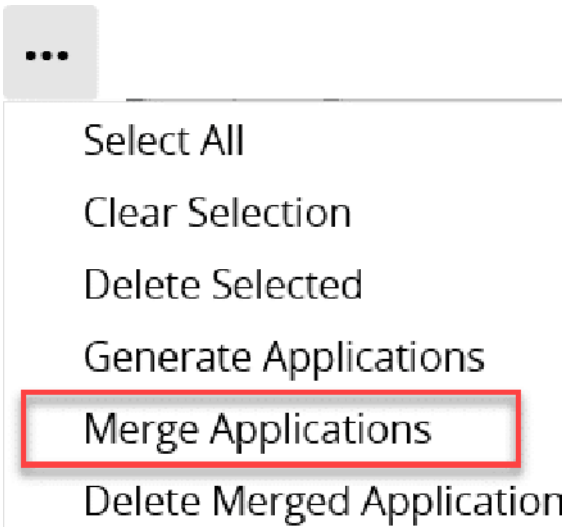
Merging applications

Merge your generated applications into one single PDF document to share with the shortlisting panel as part of their shortlisting pack.

The below images and following steps outline the process of how to merge the applications.
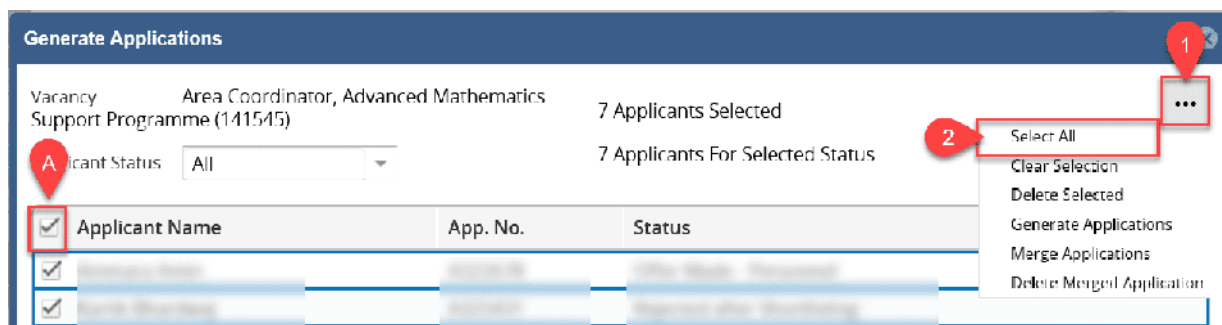
Step 1 – Select applications either by ticking them or clicking on **three dots**

Step 2– Click on the **three dots** and select **Merge Applications**

Step 3– Job submitted confirmation (onscreen pop-up notification)

Step 4– Email confirmation

Step 5– Select View Merged Applications

Step 6– The merged PDF opens in another browser window

Summary

1.   Select the applications you wish to merge by either using the tick box options or the **three dots** and **Select All** option as described earlier in this course.

2.   Select the **three dots** and then click on **Merge Applications** to merge.

3.   A notification should appear to confirm the job has been submitted.

4.   Once the merged document is ready you will receive an email notification.

5.   Return to the *Generate Applications* window and select the **View Merged Applications** button.

6.   If the merger has been successful then the online PDF of the document will open in another window. You may be required to show you trust the document source in order to open.

Not yet ready

If you select the **View Merged Applications** button before the document has finished merging you will see the following alert.
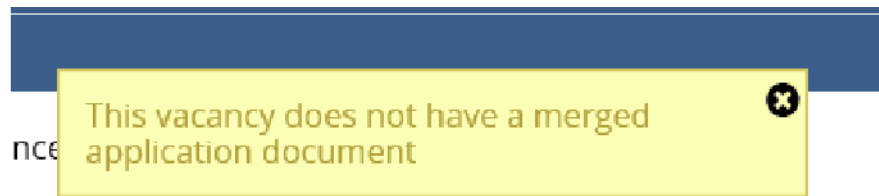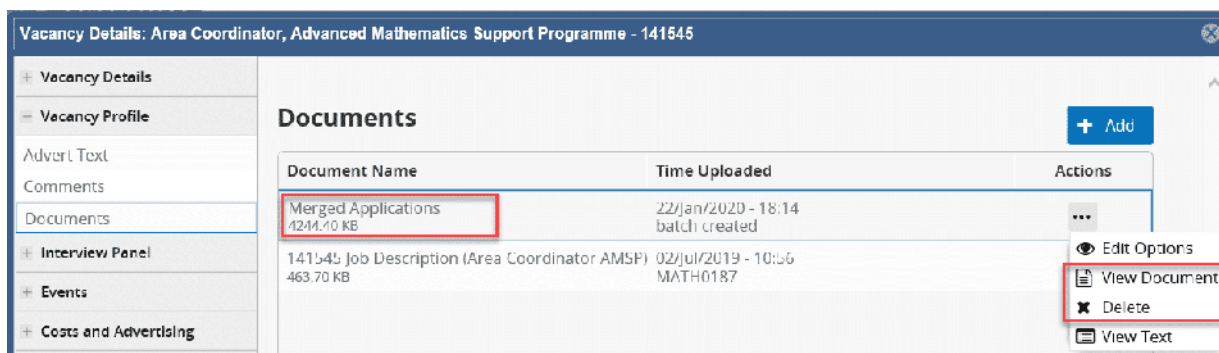

Select the **x** in the top right corner to close the alert

This vacancy does not have a merged application document

7 Applicants For Selected Status

Saved to the vacancy

Once the merged application has been created it is automatically saved to the vacancy. Navigate to the vacancy via **Recruitment Dashboard** icon, **Vacancies** tab, and search for your vacancy.

Select the **Actions** button and then click on **Edit Vacancy**, under *Vacancy Profile* select **Documents**. Here you will find the merged application, to view it select the **three dots** and click **View Document** or click **Delete** to delete the document. Once deleted it will not be accessible from *View Merged Applications* button.

Other ways to delete

You can also delete the merged application, and individual applications in the *Generate Applications* window.

Either select the application you wish to delete or select all of them, and then click on the **three dots** and then **Delete Selected**.

Or to delete the merged application click on the **three dots** and select **Delete Merged Application**.
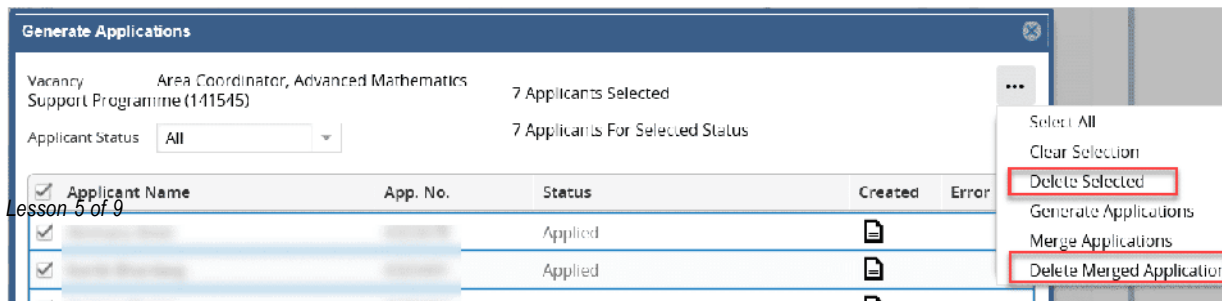
Screen for priority candidates

Priority candidates

Ahead of providing the panel with the shortlisting pack, you need to screen the applications for any priority candidates.

A priority candidate is an existing employee:

- with more than 2 years continuous service, who is within the last 3 months of a fixed term contract of employment; or
- who is at risk of redundancy from a permanent post; or
- who needs to be redeployed on health grounds.

Staff in this category are given the option of applying for vacancies as a priority candidate, which means they should be given preferential consideration by the selection panel.

Priority candidate letter

A priority candidate who wishes to be assisted with redeployment will be issued a letter by the Department which must be attached to their job application.

Screen for priority candidates

You need to identify if you have any priority candidates and then highlight these to the shortlisting panel. The best way to do this is to see if any of them have attached the priority candidate letter from their department to their application.

Check the merged application

On the Generate Applications screen, click on **View Merged Application** to open the document in a new browser.

Screening

The merged document contains all of the applications and any attachments the applicant added to their application. Priority candidates are instructed to attach their priority candidate letter to their application.

Scroll through these applications to see if any have a priority candidate letter attached. Alternatively you can use a CTRL+ F search functionality in your browser window and search by the term "priority candidate".

Priority candidates who have completed the "Application with Inbuilt Supporting Statement" will be unable to attach the letter. Therefore, you will have to use the CTRL+ F search functionality in order to look for the relevant term within their application.

Recording

If a priority candidate applies to one of your vacancies you should record this in the comments field in the *View Applicants* screen.

1.Search and select the applicant who is a priority candidate

2.Click on the three dots menu

3.Select Add Comment

4.Type your comment and save
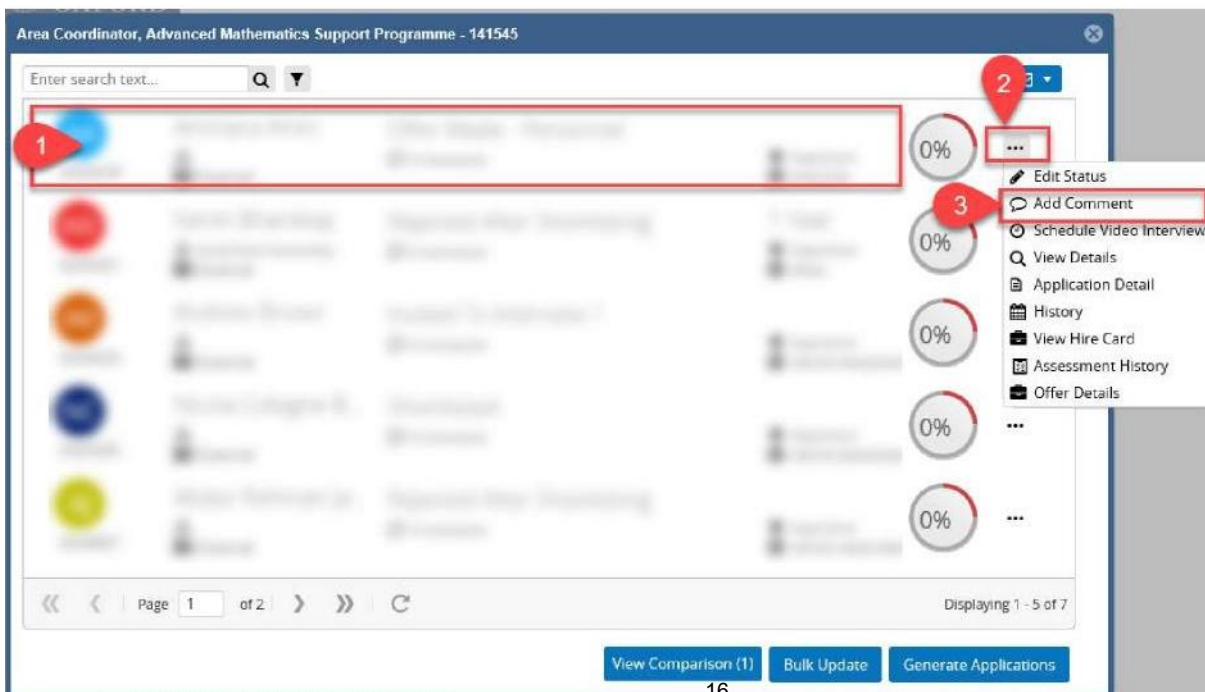
Notifying the panel

Priority applicants need to be brought to the attention of the shortlisting panel. Follow your department's process on how you notify the panel.

If the merged Application Pack is large then the panel could be advised to use CTRL+ F (search with 'priority') to locate priority candidate letters/ mentions in supporting statements if required.

Shortlisting pack

The merged application along with a shortlisting form make up the shortlisting pack.

Shortlisting form

The shortlisting form is used to record whether each applicant has met the essential and desirable criteria listed in the Job Description document attached to the vacancy. The results on this form help to determine who will be interviewed.

There are two types of shortlisting form:

A Shortlist Form Standard will allow you to score 7 essential and 7 desirable criteria

B Shortlist Form Extended will allow you to score 14 essential and 14 desirable

The shortlisting form is a Word document that we can create from Core and it will merge key fields from the vacancy, eg the applicants' names, the vacancy ID etc. Guidance on generating letters and forms in the CoreHR Recruitment portal is available from our support website.
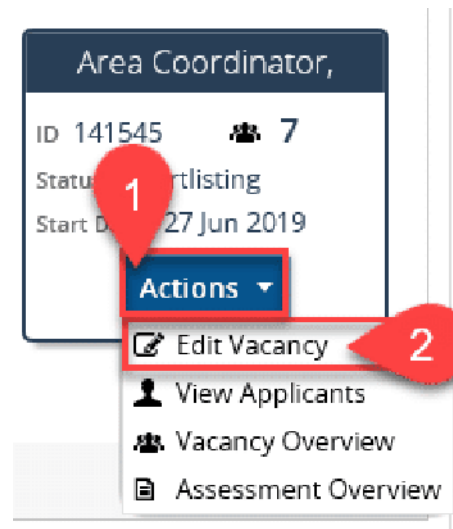
Shortlisting panel

Once you have the PDF pack and shortlisting form you can send these to the Shortlisting Panel. We always suggest you try to avoid printing these packs. In line with data protection you must ensure these documents are stored and sent securely via *Oxfile*.

Update vacancy status to shortlisting

Once the shortlisting pack has been sent to the panel, you must update the status of the vacancy from *Advertised* to *Shortlisting*.

Navigate to vacancy

In the *Recruitment Dashboard*, select the **Vacancies** tab, search and click on your **vacancy** tile. Then click on the **Actions** button and select **Edit Vacancy**

Select **Vacancy Details – 1** from the left-hand menu, under *Vacancy Details*. Then select the **drop down** menu of the *Status* field. Click on **Shortlisting** in the list. Remember to then scroll down and select **Save**.
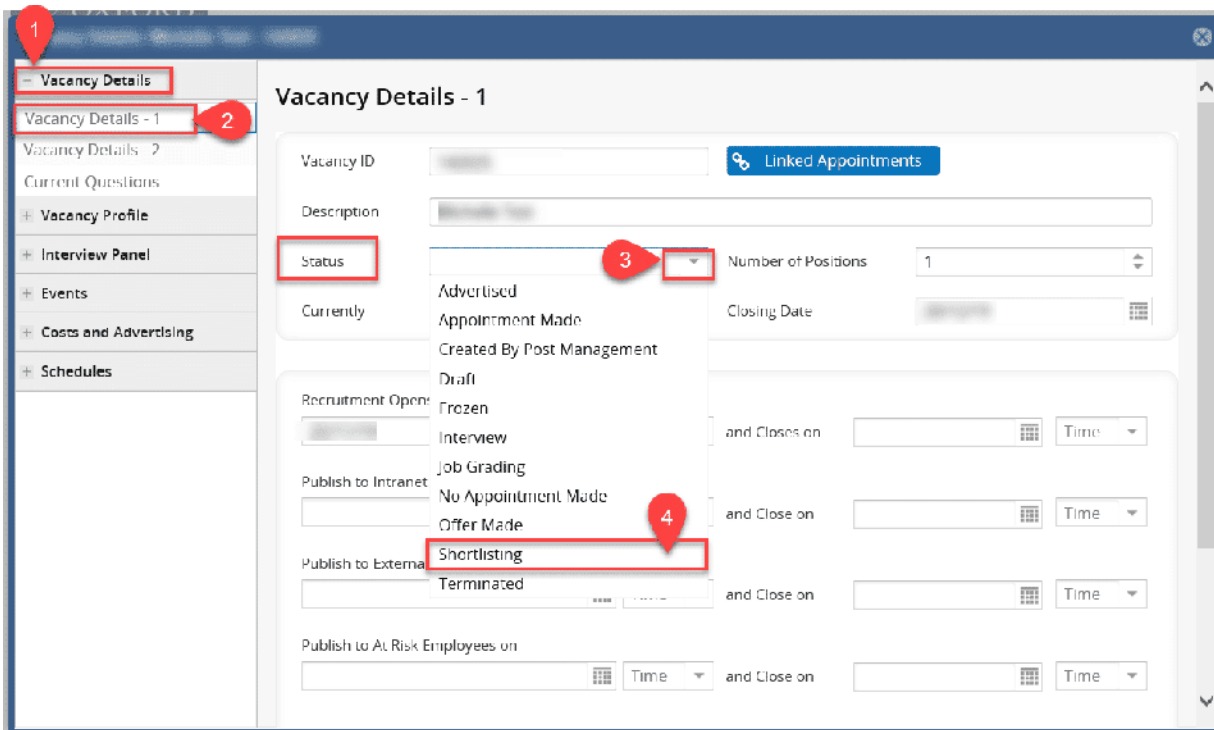
The Recruitment statuses and events diagram shows the different statuses to be used throughout the Recruitment process. Once available the REC00_Recruitment Basics guide illustrates how you update Vacancy Events and which events can be updated at this stage.

Private questions report screening

During shortlisting

Whilst your panel are shortlisting, and before the interviews, you should screen your applicants further using the *Private Questions* report.

When to run the report

This report MUST be run for each recruitment exercise AFTER shortlisting and BEFORE the interviews take place, therefore, avoiding bias within the shortlisting process.

Why should I run the report?

Several questions on the application form are not included in the shortlisting pack for the panel to see because they should not be taken into consideration when shortlisting. It is your responsibility to review these questions to see if there are any issues which could affect whether applicants can be recruited to this position and would need to be explored by the interviewers at interview.

How do I run the report?

Go to "Reporting" to run RECDEP47_Private Questions. For more information on how to run reports, either attend the quarterly classroom training or review the IP4_Running Reports guide and the Reports Library.

Question examples

Examples of applicant responses included in Private Questions Report:

- An applicant's interview availability (if included in the application questions)

- Regarding their previous employment, for example ongoing disciplinary matters or reason for leaving
- University Connections, for example are they related or do they know a panel member or anyone linked to the vacancy

- Right to return, have they previously worked at the University and have the right to return. There are certain circumstances which may place restrictions on an ex-employee returning, for example voluntary redundancy under the Oxford Mobility Incentive Scheme (OMIS)

- Criminal convictions or unspent convictions

Action required after running report

The report will only return results where an applicant's answer will require you to take action.

If your report returns any results you should seek advice from your HR Business Partner and liaise with the panel accordingly dependent on the situation. These conversations should take place before the interviews.

Depending on the advice of the HR Business Partner you may need to record the applicant as invalid. There is an 'Invalid' applicant status which you can select. For instructions on how to update applicant statuses refer to [Recruitment Types, Statuses, and Events](#).