

Shortlisting Process on ATS system

Shortlisting

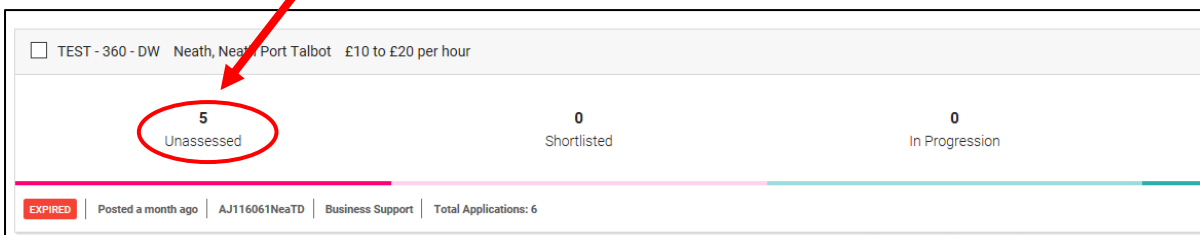
This is a critical stage in the recruitment process, this will help you to narrow down your pool of candidates and identify those who have the skills for the job role that you really need. It is important to base your decision on fact, not on assumption, making fair and objective assessments.

Key points

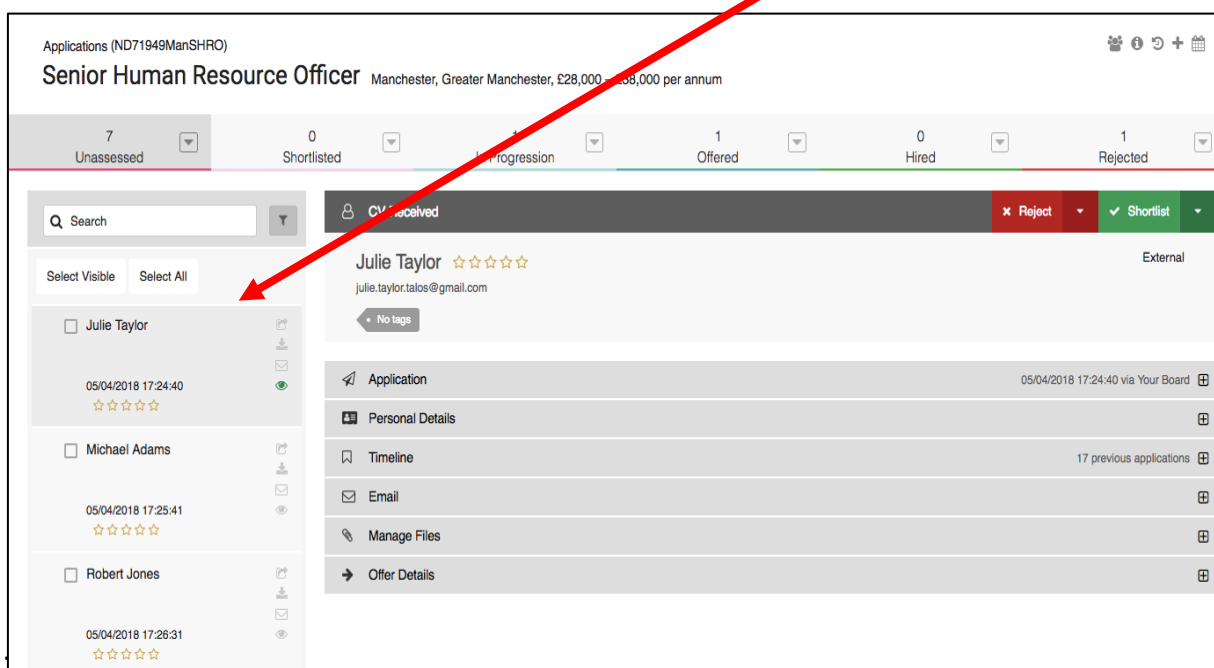
- Select A minimum of 5 essential criteria from the Role Profile to shortlist each candidate
- 2 individuals should be involved in the shortlisting process (the hiring manager and the supporting manager who will be involved in the interview stage).
- The same criteria **must** be used for each candidate.

Process

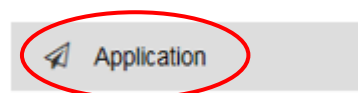
- Sign into the ATS system to start the shortlisting process
(Please contact the HR team via hr@tairarian.co.uk if you have any issues accessing the system)
- When you have signed in, go to the vacancy you would like to shortlist
- Click on **Unassessed** - This will open the applications for the role



- You will then be able to see the applications of the candidates for the role as below:



5. Click on the **Application** section (first drop down in the middle of the screen)
There are 2 sections that you should look at:



- **Application -> CV Preview** button - Click to access their CV.
- **Application -> Application Form** – Candidates are asked the question why they are interested in applying for the role, answers will appear here.

***Some of the job boards do not have this facility so this section will be blank, through no fault of the candidate.

6. When reviewing each candidate's CV you need to determine if the candidate meets the essential shortlisting requirements that you decided on at the recruitment planning meeting. This can be found in the **scoring** section (right hand side of the screen).

7. Complete the appropriate response against each requirement:

- Met
- Partially Met
- Not Met

Each option corresponds to a score:

ie, Met = 10, Partially Met = 5, Not Met = 0.

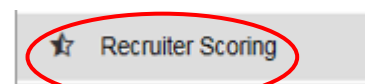
8. Click **Complete Scorecard** in order to save the responses.

A screenshot of a mobile app interface. At the top, there are two tabs: 'Notes' and 'Scoring'. The 'Scoring' tab is selected and circled in red. Below the tabs, there are three radio button options: 'Not Met', 'Partially Met', and 'Met'. Below these, there is a requirement: 'Hold CSCS card or equivalent Health and Safety certificates'. Under this requirement, there are three radio button options: 'Met', 'Not Met', and 'Partially Met'. At the bottom of the screen, there is a green button with a checkmark and the text 'Complete Scorecard', which is also circled in red. Two red arrows point from the text in the instructions to the 'Scoring' tab and the 'Complete Scorecard' button.

This must be completed for all candidates to ensure a fair and consistent process.

Without this, the recruitment process will not be able to move forward any further and a contract to the successful candidate will not be issued.

9. Click on the **Recruiter Scoring** section (second dropdown in centre of screen) to see the overall score of the candidate – this should be used to either progress them onto interview stage or 'Reject at shortlisting'.



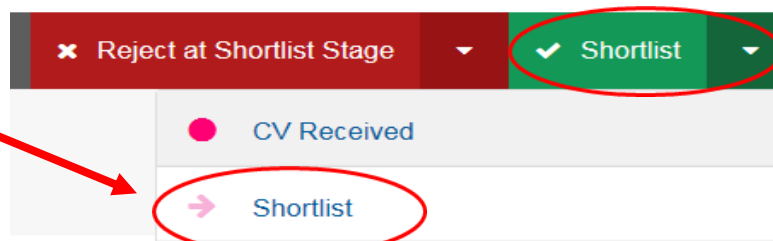
10. The following screen will be shown:

A screenshot of a mobile app interface titled 'Recruiter Scoring'. It shows a 'Total Score' of 25. Below this, there are 'Individual Scores' for four requirements, represented by colored circles: a red circle with '0', a blue circle with '5', a green circle with '10', and another green circle with '10'. To the right of these circles, it says '(Completed 02/09/19)'. At the bottom, the role 'Multi-skilled Operative 2' is listed. A red arrow points from the text in the instructions to the 'Total Score' area.

11. All candidate's that meet the shortlisting criteria score should be progressed into the '**Shortlisting**' pot (This will have been discussed at your recruitment planning meeting - where you decided what score your candidates will need to achieve as a minimum in order to be taken through to the next stage).

12. To **Shortlist** a candidate - click on the green **Shortlist** tab (top right-hand corner)

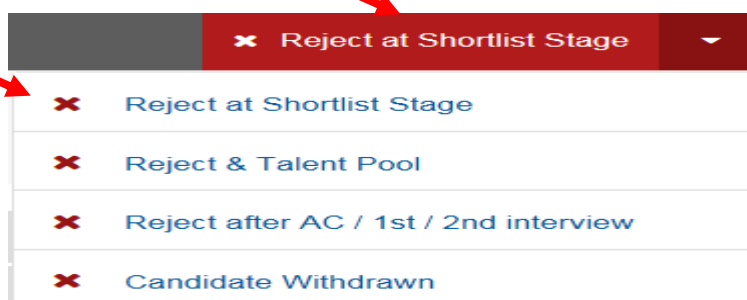
13. Click on **Shortlist** to complete



14. All candidates that do not meet the criteria need to be moved to the '**Reject**' pot

15. To **Reject** a candidate – click on the '**Reject at shortlisting stage**' tab (top right-hand corner)

16. Click on '**Reject at shortlisting stage**' to complete



17. You will be asked "**Are you sure?**" just in case you have accidentally pressed the wrong button. If you still wish to reject the candidates, click again to send the rejection email template to the candidate.

The ATS has standard email rejection template for rejecting candidates at the shortlisting stage. Candidates will receive the email 24 hours after you have sent it thanking them for their application, notifying them that they have been unsuccessful and advising that we are unable to offer feedback at shortlisting stage.

18. Go through each candidate completing steps 12 to 17 as required. Once this has been completed for **all** candidates the shortlisting process is complete and you are ready to move on to invite successful candidates to interview.

If you have any questions about shortlisting or any of the recruitment process, please contact the HR team via hr@tatarian.co.uk.

For information – further reading can be found here: [Recruitment & Selection Q&As | CIPD](#) (CIPD,2022).

To confirm:

The learning resource will be made available via the staff intranet under the specific recruitment folder which all managers have access to via laptop, iPad, and mobile phone. It will be saved and uploaded as a PDF, this will ensure the formatting and layout remains the same and in the correct order. It will be available to print if needed but having the option to access the resource on all IT equipment should minimise this and promote the organisations' ethos of becoming carbon neutral by 2025.

The current recruitment process involves an initial recruitment planning meeting with the hiring manager and HR to start the process, after this a follow-up email with any information discussed is sent to the hiring manager, this resource will be included in this pack for easy accessibility and is therefore also given at point of need.

To evaluate the effectiveness of this resource I will ask for manager feedback and reaction. Then consider the amount of help that is asked for in relation to shortlisting on the ATS system in particular. Also, after a manager has shortlisted using the resource checks could be made to see if it has been completed correctly, to establish if the resource is working. This evaluation method could be considered in line with Kirkpatrick's four-level model (1959), (Stewart and Cureton, 2014, p.128).

Bibliography

1. ACAS (2021) '*Recruitment: hiring someone*' [Online] Available via: <https://www.acas.org.uk/hiring-someone> Accessed on: 03 March 2022
2. CIPD (2021) '*Recruitment: an introduction*' [Online] Available via: <https://www.cipd.co.uk/knowledge/fundamentals/people/recruitment/factsheet> .Accessed on: 03 March 2022
3. CIPD (2022) '*Recruitment and selection Q&As*' [Online] Available via: <https://www.cipd.co.uk/knowledge/fundamentals/emp-law/recruitment/questions> .Accessed on: 13 March 2022
4. Clayton-Smith, A. (2022) '*Shortlisting job candidates fairly and effectively*' [Online] Available via: <https://www.xperthr.co.uk/good-practice-manual/shortlisting-job-candidates-fairly-and-effectively/116843/> Accessed on: 03 March 2022
5. Personnel Today (2005) '*Shortlisting job candidates*' [Online] Available via: <https://www.personneltoday.com/hr/shortlisting-job-candidates/> Accessed on: 03 March 2022
6. Shackleton-Jones, N. (2019) '*How people learn*'. London. Kogan page limited.
7. Stewart, J. and Curenton, P. (2014) '*Designing, Delivering and Evaluating L&D: Essentials For Practice*'. Glasgow. CIPD.