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## Screen Candidate Process

### Staff and Temp/Casual Job Requisitions

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The **Screen** status/step is a **Hiring Manager** responsibility.

Candidates in this stage have been determined to meet the minimum qualifications of the position for which they applied. All candidates must be evaluated against a common set of criteria to determine their suitability for the next step in the interview process. The following steps will help determine which candidates will be moved into the Interview stage.

#### 1. Create a Screening Matrix outside of Workday.

- a. Download the [Screening Matrix](#) – Located in the [Talent Management Forms Page](#)
- b. Click on **Enable Content** button on the top of the screen (if it appears), then click the blue **Start** button on the form underneath the Applicants column.
- c. Navigate to column D2 (the first tall skinny box above the row of 1's) to enter the screening criteria. Use one column for each criterion. **You may not add experience, skills or education to screen that is not specifically listed in the Job Requisition.** **TIP:** To ensure you are screening on appropriate experience, education and/or skills, use those items from the job requisition as your guide. They can be found as *required* or *preferred* qualifications and/or skills in the job requisition. You should only screen on experience or skills you can determine from reviewing the application materials. For example, interpersonal skills would be more appropriately assessed during an interview.
- d. Leave the Assigned Weight for each criteria at 1 to use the ranking score unweighted, or you can set weights for the various columns. The matrix will multiply the weighting for each column and score each candidate in that column to provide the Application Score.
- e. Assigned Weights for the Interview(s) and Reference scores are also available and may be used as appropriate to contribute to the final score for each candidate.
- f. Notate **Veteran's Preference** and **Former Foster Child**, which can be found on the **Primary Questionnaire results** for each candidate. **TIP:** Additional information and instructions can be found for these items in the tabs located in the screening matrix spreadsheet.

**WARNING:** Hiring Managers and Recruiting Coordinators **DO NOT** have authorization to move Candidates using the Workday Grid after the candidate's Initial Review has been completed. Candidate screening will only be done via tasks sent to the Hiring Manager's Workday Inbox.

#### 2. Hiring Manager will receive a Workday Inbox Task for each candidate moved from Initial Review to **Screen** for each Job Requisition in their organization.

- a. Inbox task shows: **Screen: Jonathan Doe – R-001234 Business Coordinator I (C-100000122)**

- b. Click to open the task.
  - i. All parts of the application and application materials for the candidate, including any attached documents, which will open in a separate window.
  - ii. Tabs
    1. **Overview:** Contains completed application fields (Experience, Education, Skills, etc. Attachments are also available for viewing. Workday summarizes data entered for Current Job length, Total Jobs and Total Experience.
    2. **Screening:** Contains answers to the Primary Questionnaire, which consists of compliance questions such as sponsorship, Veteran's Preference, Former Foster Child, previous/current state service, relationships regarding nepotism and current system employment. The Secondary Questionnaire includes qualifying questions/answers (related to minimum qualifications) and supplemental questions/answers requested.
    3. **Interview:** any Interview feedback available or none
    4. **Questionnaire Results:** same as Screening
    5. **Attachments:** all documents that were attached by the candidate
    6. **Employment Offer:** information about an offer or none
- c. Enter the name of the candidate on the **Screening Matrix** created in Step 1 above and enter screening values on the matrix using the information available on Workday
  - i. Continue entering candidates on the Screening Matrix until all candidates have been evaluated.
  - ii. You should not **Decline** any candidate until you are sure the selected candidate will be hired. If you are screening candidates prior to unposting the job requisition, you must enter all candidates from the Screen status into the screening matrix. **TIP:** As you add and score candidates on the **Screening Matrix**, click the **Sort** button under the Total Score column to **<<Start here>>** determine your readiness to move forward with Interviews.
- d. When you decide you are ready to move candidates forward to **Interview**, the Hiring Manager or the Recruiting Coordinator should send an email to [jobs@tamu.edu](mailto:jobs@tamu.edu) and request the **Job Requisition be Unposted**. This will stop the flow of candidates to the pool.
- e. Go to the **Inbox task to Screen** the candidates you will want to move forward to Interview and Move Forward to Interview each candidate. You can also decline candidates at this point, by going to the Inbox task for the candidate and choosing Decline and a reason. In the Screen status, you will generally use *Less Effective Skills* or *Less Effective Education* or *Candidate Withdrew*. You should not use *Did Not Meet Minimum Qualifications*. If a candidate is in Screen, they have been reviewed and determined to meet the Minimum Qualifications.
- f. **All candidates must be dispositioned for the Job Requisition to be marked Filled at the end of the Recruitment.**

2. **Search Committees** give members read-only access to the application materials for all candidates in the Screen and Interview status. Search Committee members do not have the ability to update, rank or disposition the candidates in Workday. **TIP:** Only Recruiting Partners can create Search Committees and assign members.
3. When creating a Job Requisition, use the Additional Job Description field to request the creation of a **Search Committee**, including the names of committee members. Email [jobs@tamu.edu](mailto:jobs@tamu.edu) to create a Search Committee for an existing Job Requisition. Include the Job Requisition number and Job Title and the names of the employees you wish to be members. Additional members can be added at any time in the process. Search Committee Members will receive an email once they have been added and given the security role access.

### **Recruitment & Workforce Planning Contact Information**

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