

# Screening Guidelines

## Information for Managers

### Screening

Screening is objectively assessing each application against the essential and desirable criteria set out in the job profile and job posting and determines which applicants will be considered for further assessment.

Taking the time to screen thoroughly and systematically will ensure you have the best selection of applicants moving forward in your competition. Screening must not involve any discriminatory practices. If it is done systematically there should be little chance of bias. For information on prohibited grounds for discrimination and accommodation when hiring please read [Manager's Guide to Reasonable Accommodation](#).

**Hiring Managers** are responsible for clearly identifying the required qualifications in the job profile and job posting. See Define your Selection Criteria [Define your Selection Criteria](#) for more information. During the screening process you will need to make sure that all applicants meet the eligibility requirements. Next, you will screen for education and experience, and shortlist potential applicants. Following the screening process, you will then assess shortlisted applicants on the

knowledge, skills, abilities, and competencies required to perform the job.

**Applicants** are responsible for clearly outlining how they meet the required qualifications.

## Screen for Eligibility

Before you begin the process of reviewing applications ensure that all applicants meet the eligibility requirements. Screening for eligibility is the process used to verify whether an applicant meets specific criteria required to work in Canada and required to work in the position. All applicants must meet the basic criteria of minimum age of 16 and eligibility to work in Canada. Only eligible applicants are screened for further consideration in your competition.

Other eligibility criteria that may apply:

- In-service eligibility – Internal competitions are only open to applicants who have in-service status.
- Relocation within two years – An applicant may have a restriction regarding relocating within two years of a previous appointment.
- Geographic restrictions – If used, does the applicant meet the geographic restriction requirement. It is important to note that the New West Trade

Partnership Agreement, of which BC is a partner, does not allow the restriction of external applicants to geographic locations. From a merit perspective, a geographic restriction applicable to internal staff, yet offering those opportunities for external applicants, presents an uneven scope of opportunities between internal and external applicants.

- Designated group membership –staffing actions that are restricted in support of workplace diversity.

## Factors considered when screening

- **Previous Experience** is probably the most useful screening criteria available, with relevant experience having been defined in the job profile and/or job posting. Also consider the quality of the experience.
- **Educational Requirements** must be necessary for effective performance of the job, and then only those applicants who have the qualification stated in the job profile and/or job posting should be shortlisted. When screening on educational requirements, you must consider foreign degrees that have been granted Canadian equivalency.
- **Equivalencies** or equivalent combinations of education and experience are often used in screening. Equivalencies must be clearly outlined in the job requirements. For example, a “two-year diploma with four years related

experience” may be considered equivalent to a “degree with two years related experience.” In some cases where a certain level of education is required, there is no provision/flexibility for equivalency e.g. engineers.

- **Occupational Certifications** can be used only if possession or eligibility for such credential is a bona fide occupational requirement.
- **Professional Designations** Some positions have a requirement for a particular professional designation. This is usually because of legislative or policy requirements for licensing.
- **Drivers or Other Licenses** must be absolutely necessary in order to work in the position. Asking for credentials without a bona fide occupational requirement can create barriers to otherwise qualified applicants.

## Basic Principles

### Be Objective

Remember that screening involves objectively assessing each applicant against the essential and desirable criteria set out in the job profile and job posting. It is very important that you don't let any other aspect of the application influence your decision. Making decisions based on things such as gaps in service could be seen as discriminatory. For example, a gap in service may be linked to a disability.

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## Be Fair

You should endeavor to be as fair as possible. If there is a conflict of interest or perceived conflict of interest, you should avoid involvement in the hiring process.

## Screening Methods

To screen applicants, you may use information obtained from one source or combination of sources such as the applicant's resume, cover letter, and online questionnaire. Screening should be done in the most efficient, job related, fair, reasonable, and consistent manner possible.

### Resume and Cover Letter Review

This involves reading the resumes and cover letters (if requested) to confirm that applicants possess the essential and desirable qualifications. If you request that applicants submit a cover letter you must consider information provided in the cover letter when making screening decisions. You will need to determine prior to posting the job whether you require applicants to submit a cover letter.

## Online Self-Screening Questionnaire

An online self-screening questionnaire usually consists of multiple-choice questions or questions that can be answered by “yes” or “no”. Applicants select the choices that best reflect their qualifications and self-screen against the selection criteria. Typically, automatic knock-out answers are used to eliminate applicants that don’t meet the essential qualifications. A self-screening questionnaire is effective only when the selection criteria are clear, specific, and accurately reflected in the questionnaire. A self-screening questionnaire is recommended for entry level positions and high volume hiring. Use of a self-screening questionnaire does not replace the manual review of applicant resumes. It is highly recommended that additional manual screening is done for all applicants who pass the questionnaire to ensure the information provided in the resume supports applicant answers to the online questionnaire.

Applicants that fail the self-screening questionnaire may be removed from consideration. If you have a small number of applications, you may decide to spot check random sample of failed questionnaire results to see why applicants may be failing the questionnaire. Sometimes applicants fail the questionnaire due to the design of the questionnaire questions.

If you decide you want to consider an applicant that has failed the questionnaire, it is important to then equally consider all the other applicants that also failed the questionnaire. This spot-checking practice may not be reasonable for high volume

hiring and it is acceptable for a hiring manager to eliminate candidates from further consideration if they failed the questionnaire.

## Online Text Form Questionnaire

An online text form questionnaire can be used to get more detailed information about how applicants meet the job requirements. This involves applicants clearly outlining how they meet the job qualifications by providing free form answers to the qualification questions. The information obtained from the online text form questionnaire, resume and cover letter (if applicable) is then used to complete the screening.

NOTE: Combination of self-screening questions and text form questions may also be used.

## Key Considerations in screening

1. Use only stated selection criteria; new criteria cannot be introduced when screening.
2. Review the required documents outlined in the job posting against the essential (minimum) selection criteria stated in the job posting and/or job profile. This includes a combination of the following: resume, questionnaire, cover letter.

3. Equivalencies or equivalent combinations of education and experience must be applied consistently for all applicants.
4. Desirable (preferred) selection criteria are used when a large number of applicants meet the essential (minimum) selection criteria. Desirable selection criteria are useful to further reduce the number of applicants to a smaller number. If using desirable criteria, consistently apply the criteria to all applicants who meet the minimum requirements.
5. Check facts against factual criteria. Do not make assumptions and avoid stereotyping.
6. Look for information which gives evidence of the presence of required education and experience (quantity and quality).
7. Guard against making assumptions about the abilities of men or women in general, or generalities about people from ethnic minorities, groups, or people with disabilities.
8. Do not try to eliminate people by guesswork.
9. Valid reasons why/ why not each applicant was shortlisted must be documented to confirm that the same criteria were applied to all applicants.



## Screening Process

Screening can be completed by the hiring manager or jointly by the interview panel members. Consider all the applications against the essential and desirable criteria. Use the [Applicant screening template](#) to document the screening process and screening decisions along with valid reasons for each applicant.

### Mention and evidence

First consider whether the applicants meet the essential criteria. Essential criteria are of equal merit and are not ranked. A useful way of doing this is the 'Mention and Evidence' approach.

**Mention:** Review the application i.e. cover letter, resume, online questionnaire to see whether the individual mentions the essential criteria and to what extent. For example; the essential criteria includes 'experience giving presentations to a wide variety of audiences' and the resume states: 'I have given numerous presentations to audiences ranging in size from 10 to 1000'. If the individual makes no mention of essential criteria it can be considered that they do not meet the requirements of the role.

**Evidence:** Where the individual has mentioned an essential criterion, review the

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content with a view to considering what evidence is provided in support. Using the example above, the individual has provided further evidence to meet this: 'My most recent presentations include presentation to (organization) where I presented to a 200-member committee; In addition I also presented to audiences of up to 20 in 4 various seminars while working at (company) as (job title) during (year).' If the individual does not include evidence, although they seemingly meet the essential criteria by way of a mention of the essential criteria, their application form is weakened and may therefore not be shortlisted.

## Desirable criteria

Desirable (preferred) criteria must be clearly stated in the job profile or job posting. Whenever you have a high number of applicants who meet the essential (minimum) criteria, the desirable criteria should then also be considered. You may use one or more of the stated desirable criteria to further screen the competition. The desirable criteria may be of different weights and therefore may be ranked in an order.

Use the 'Mention and Evidence' approach to assess desirable qualifications.

## Do not add further criteria

You should never introduce any additional criteria into the process after the role has been advertised. Applicants may provide evidence of a particular qualification. However, if it is not within the advertised job criteria it must not be used to assess the applicant in relation to the role and must not then be considered for other applicants.

## Internal and External applicants

You should treat internal and external applicants the same irrespective of knowledge about their work. Previous knowledge of an applicant's qualifications has a possible potential for both direct and indirect discrimination because you are considering someone's previous opinions and judgements. You must always remain objective and meritorious. If you have questions about repeat applicants that have been previously assessed for the same or similar position please contact your recruiter or [AskMyHR](#).

## Confidentiality

You will be holding documents containing individuals' personal details. You must take care in the handling of these documents and in the release of any information from them. You must also take care to store the documents in a safe place when you are not using them during the hiring process.

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## Feedback

Following screening, unsuccessful applicants should be advised that they have not been shortlisted. Should you consider giving feedback at this stage of the process, it must be based on the content of the screening form.

Need more assistance?

Contact [AskMyHR](#)