

## 5.15: Screening Applicants

### Learning Objective

- Describe techniques to help screen a potential employee.

The objective of using various screening techniques and levels of screening is to filter out candidates that either don't meet the stated minimum requirements or aren't a good fit for cultural or other reasons (i.e., job realities or salary expectations). Screening is simply a process of elimination. The goal is to ensure that those candidates who are invited to participate in a face-to-face interview are, in fact, highly qualified.

There are five primary techniques for helping to screen potential candidates that also represent phases in the screening process:

1. **Evaluation by Association:** Use the posting location—i.e., an industry or professional association-specific job site—as an initial screen.
2. **Application:** Conduct an initial assessment based on review of a candidate's cover letter, resume and application. This may also include review of a candidate's business (i.e., LinkedIn) and/or social networking (i.e., Facebook or Twitter) profiles. To avoid investing time assessing a candidate that isn't viable, incorporate pre-screening questions that require the candidate to attest that he or she meets the stated minimum criteria. In this phase, the objective is to eliminate candidates that don't meet the basic requirements for the position based on fundamental factors including minimum experience and education, salary expectations and/or willingness to relocate or meet work schedule requirements, if applicable.
3. **Assessment:** Conduct a preliminary assessment of skills. This can be done in conjunction with or subsequent to the application review process. Depending on position requirements, a more in-depth assessment of a candidate's level of skill and aptitude may be appropriate.
4. **Screening Interview:** An initial telephone interview is a second level of active screening that's used to assess the candidate's objective and motivation, relevant education and experience and to get a sense for the candidate as a person. In the course of approximately twenty to thirty minutes, an interviewer can confirm application and resume details and assess a range of soft skills—for example, active listening and communication—as well as engagement and overall level of poise and professionalism. The objective is to eliminate candidates that don't warrant the time and cost of an in-person interview or in-depth skills assessment.
5. **External Verification:** Verify stated educational qualifications and check references.

Using these techniques in combination with an online application system allows companies to reduce the time and costs of a paper-based recruiting and screening process and may reduce liability associated with compliance reporting and record retention.

### Learn More

Check out [SHRM's Guide to Application Tracking Systems](#).

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