PARTICIPANT GUIDE

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Recruitment, Assessment and Selection

Applicant Assessment: Applicant Materials Screen (AMS)

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Applicant Assessment: Applicant Materials Screen (AMS)

APPLICANT ASSESSMENT: APPLICANT MATERIALS SCREEN (AMS)

This module introduces one type of assessment – the applicant materials screen (AMS). AMS outlines a best practice method to help ensure the right talent and best fit for your position.

PURPOSE

The purpose of this module is to introduce a step-by-step procedure to review and assess applicant materials.

LEARNING OUTCOMES

At the end of this module, you will understand:

- The AMS process
- How to develop screening criteria in a job-related and non-discriminatory manner
- How to prepare, apply and document a materials screen using the AMS Tracking Tool
- How to analyze results of a materials screen and proceed

What are your expectations for this class? What personal or departmental benefits do you anticipate from completing this class?

TO LEARN MORE:

Visit ohrd.wisc.edu

- Reference materials
- Document downloads
- Resource listings
- Upcoming HR Design events

AGENDA

- What is AMS?
    - Review the AMS process
- Create Screening Criteria
    - Worksheet #1 – Critical Worker Activities/Duties
    - Worksheet #2 – Linking to Knowledge/Skills
    - Worksheet #3 – Writing and Benchmarking Criteria
- Prepare a Materials Screen
    - AMS Tracking Tool
- Apply and Analyze Results of a Materials Screen
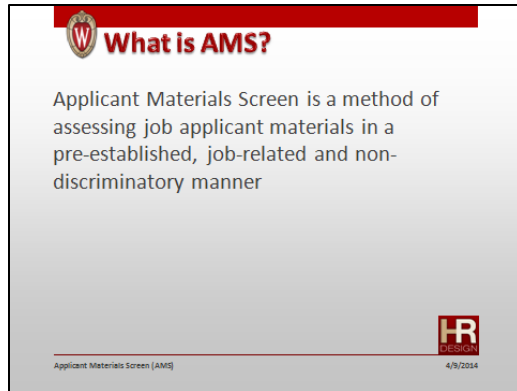- Check for Understanding

Notes:

WHAT IS AMS?

When assessing materials from job applicants, you want to screen for the applicants with the right talent for the position. You also want to have an interview pool that is a manageable size to ensure you can make a hire in an efficient time frame. And you need to do all this in a pre-established, job-related and non-discriminatory manner.

Using AMS ensures a fair and timely process. By investing the time early in the recruitment to create solid screening criteria, you will reap the benefits of candidates with the right talent and less time spent in interviews.

Notes:

THE AMS PROCESS

When using AMS, the first step is to determine the screening criteria that you will use to review materials. This step should happen at the very beginning of the recruitment, well before you have received applicant materials.
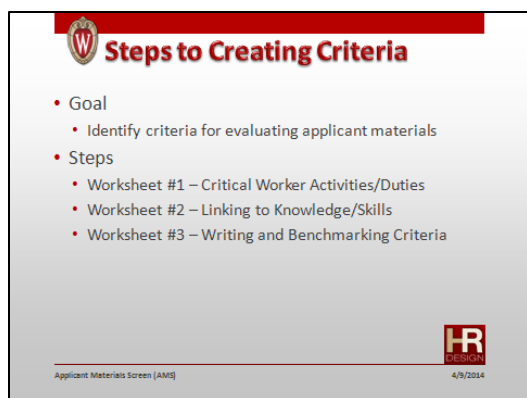
1	Create job-related and non-discriminatory screening criteria
2	Prepare the AMS Tracking Tool
3	Apply, analyze and document the screen

Notes:

CREATING SCREENING CRITERIA

One of the most important stages of AMS is creating job-related, non-discriminatory screening criteria. Using the series of three worksheets explained here, and practiced in class, will assist you in completing this stage.

Worksheet #1 – Critical Worker Activities/ Duties **+** Worksheet #2 – Linking to Knowledge/ Skills **+** Worksheet #3 – Writing and Benchmarking Criteria **=** Goal: Identify criteria for evaluating applicant materials

 Notes:

This worksheet is available at www.ohrd.wisc.edu under HR Design.

WORKSHEET #1 – CRITICAL WORKER ACTIVITIES/DUTIES

The purpose of this worksheet is to assist you in identifying and narrowing the activities/duties that are critical to the position.

What you will need to complete worksheet #1:

- Position Description or Position Vacancy Listing
- Familiarity with the role
    - The **ideal** person to complete this worksheet is someone close to the job (typically the supervisor)

Notes:

Worksheet #1 - Process

1. Determine activities/duties on PD/PVL to transfer to the Worker Activities/Duties column
2. Assign an Importance value 1-4
3. Assign a When Needed value 1-4
4. Assign a Frequency value 1-4
5. Assign a Distinguishing value 1-4
6. Totals will reflect the most critical activities/duties of the position

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PROCESS FOR COMPLETING WORKSHEET #1 – CRITICAL WORKER ACTIVITIES/DUTIES

1. Determine activities/duties on PD/PVL to transfer to the Worker Activities/Duties column

- Consider duties that have the highest percentage of time
- Keep it to a manageable number (15 or fewer)

2. Assign an Importance value 1-4 to each activity/duty. (How important is this activity/duty to the overall role?)
   - 4 = Critical
   - 3 = Very Important
   - 2 = Moderately Important
   - 1 = Slightly Important

Notes:

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(Continued) **PROCESS FOR COMPLETING WORKSHEET #1 – CRITICAL WORKER ACTIVITIES/DUTIES**

3. Assign a When Needed value 1-4. (When must an employee be competent in this area?)
   - 4 = Needed the first day
   - 3 = Must be acquired within the first three months
   - 2 = Must be acquired within the first 4-6 months
   - 1 = Must be acquired after the first six months

4. Assign a Frequency value 1-4. (How often does the activity/duty need to happen?)
   - 4 = Every few hours to daily
   - 3 = Every few days to weekly
   - 2 = Every few weeks to monthly
   - 1 = Every few months to yearly

Notes:

(Continued) PROCESS FOR COMPLETING WORKSHEET #1 – CRITICAL WORKER ACTIVITIES/DUTIES

5. Assign a Distinguishing value 1-4
    - 4 = Critically Valuable
    - 3 = Very Valuable
    - 2 = Moderately Valuable
    - 1 = Slightly Valuable

TIP
- When you compare this activity/duty to all the other activities/duties, how valuable is it to success in the position?
- What is the most critical of the criticals?
- These should not all be 4's nor should it be an evenly distributed ranking.

6. The totals will reflect the most critical activities/duties of the position. This will help you identify which 5-10 items to transfer to Worksheet #2.

What did you learn about worker activities/duties as a result of this exercise? How might this be helpful in your overall assessment of applicant materials?

This worksheet is available at www.ohrd.wisc.edu under HR Design.
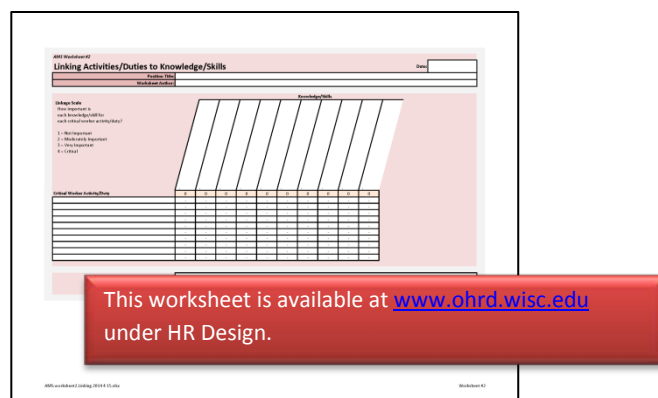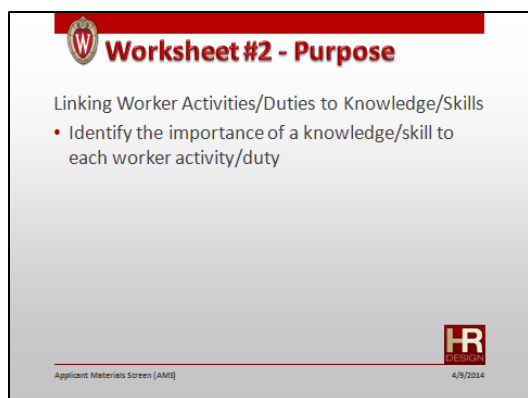
WORKSHEET #2 – LINKING WORKER ACTIVITIES/DUTIES TO KNOWLEDGE/SKILLS

The purpose of this worksheet is to identify the importance of a knowledge/skill to each worker activity/duty.

What you will need to complete worksheet #2:

- Completed worksheet #1
- Position Description
  - o You will reference the knowledge and skills section
- Position Vacancy Listing
  - o You will reference the experience section
- Familiarity with the role
  - o The **ideal** person to complete this worksheet is someone close to the job (typically the supervisor)

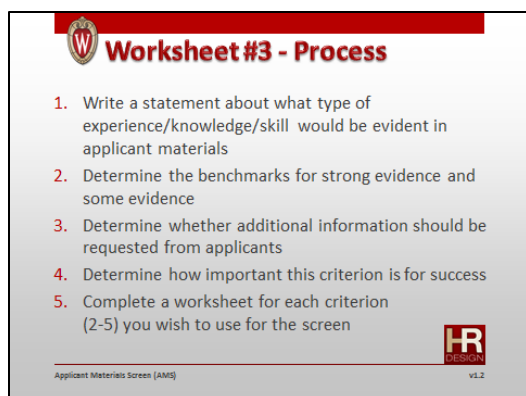*Notes:*

Worksheet #2 - Process

1. Transfer 5-10 of the most critical worker activities/duties from worksheet #1
2. Choose 5-8 essential knowledge/skills from the PD/PVL
3. Evaluate the extent to which each knowledge/skill is important for task performance
4. Totals will help you form your criterion statements

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PROCESS FOR COMPLETING WORKSHEET #2 – LINKING WORKER ACTIVITIES/DUTIES TO KNOWLEDGE/SKILLS

1. Transfer 5-10 of the most critical worker activities/duties from worksheet #1.
2. Choose 5-8 essential knowledge/skills from the PD/PVL and transfer to the worksheet.

- Each should be a specific knowledge or skill and not combined with another knowledge/skill (e.g. verbal and written communication should not be combined)

Notes:

(Continued) PROCESS FOR COMPLETING WORKSHEET #2 – LINKING WORKER ACTIVITIES/DUTIES TO KNOWLEDGE/SKILLS

3. Evaluate the extent to which each knowledge/skill is important for task performance
   - 4 = Critical
   - 3 = Very Important
   - 2 = Moderately Important
   - 1 = Not Important

4. The totals will help you form your criterion statements.

What did you learn about how worker activities/duties link to knowledge/skills as a result of this exercise? How might this be helpful in your overall assessment of applicant materials?
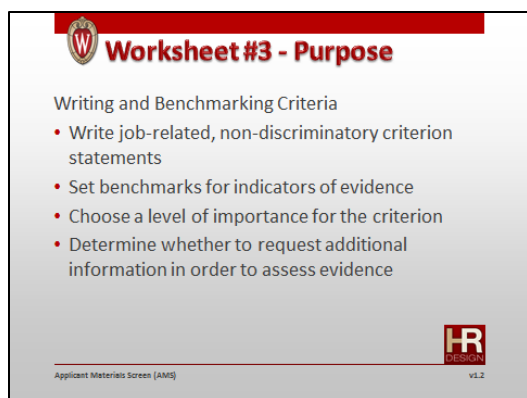
This worksheet is available at www.ohrd.wisc.edu under HR Design.

WORKSHEET #3 – WRITING AND BENCHMARKING CRITERIA

The purpose of this worksheet is threefold:

1. To write job-related, non-discriminatory criterion statements
2. Write benchmarks for indicators of evidence
3. Determine whether to request additional information in order to assess evidence

What you will need to complete worksheet #3:

- Completed worksheets #1 and #2
- Familiarity with the role
    - o The ideal person to complete this worksheet is someone close to the job (typically the supervisor)

Notes:

Worksheet #3 - Process

1. Write a statement about what type of experience/knowledge/skill would be evident in applicant materials
2. Determine the benchmarks for strong evidence and some evidence
3. Determine whether additional information should be requested from applicants
4. Determine how important this criterion is for success
5. Complete a worksheet for each criterion (2-5) you wish to use for the screen

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PROCESS FOR COMPLETING WORKSHEET #3 – WRITING AND BENCHMARKING CRITERIA

1. Write a statement about what type of experience/knowledge/skill would be evident in applicant materials

EXAMPLE OF A GOOD CRITERION STATEMENT
- Experience scheduling appointments
- Why is it good? - A specific item that could be found in materials.

EXAMPLE OF A POOR CRITERION STATEMENT
- Organizational skills and effective oral and written communication techniques.
- Why is it poor? - Includes too many areas to evaluate.

Notes:

(Continued) PROCESS FOR COMPLETING WORKSHEET #3 – WRITING AND BENCHMARKING CRITERIA

2. Determine the benchmarks for strong evidence and some evidence

- Statements should be what you are looking for in the materials that show evidence of the criterion
- Consider all types of experience, knowledge and skills – educational, career, and personal. Examples include:
  - Experience working in a similar environment
  - Experience performing similar tasks
  - Experience working with required software or systems
  - Experience providing direction to employees with similar responsibilities
  - Evidence of complimentary educational experiences
  - Application materials show evidence of required skills (i.e. resume formatting, grammar, etc. for an administrative position that will draft correspondence)
  - Experience with specialized equipment or technology
  - Experience with an organization similar to that of the University or department
  - Evidence of generating similar work product
  - Evidence of working in an environment that required similar knowledge, skills or abilities

3. Determine whether additional information should be requested from applicants
   - Will you be able to find the evidence in a resume alone or will you need to ask specific questions of the applicants?

4. Determine how critical this criterion is for success in the position
   - Not all criteria are created equal
   - Is this a "must-have" or a "nice-to-have"?
   - **This step is best completed after you have determined all screening criteria. When looking at all items (2-5), determine which are most critical.

(Continued) PROCESS FOR COMPLETING WORKSHEET #3 – WRITING AND BENCHMARKING CRITERIA

5. Complete a worksheet for each criterion (2-5) you wish to use for the screen

> **TIP**
> - You must have at least 2 screening criteria
> - You may use a maximum of 5 screening criteria
> - If you write a criterion that you just don't think you will be able to find in written materials – save it for an interview question

What did you learn about writing and benchmarking criteria as a result of this exercise? How might this be helpful in your overall assessment of applicant materials?
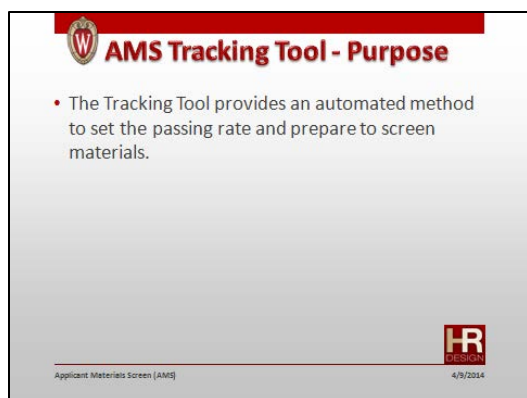
The AMS Tracking Tool is available at www.ohrd.wisc.edu under HR Design.

PREPARE A MATERIALS SCREEN: SET THE PASSING RATE

The purpose of the AMS Tracking Tool is to provide an automated method to set the passing rate and prepare to screen materials.

What you will need to set the passing rate:

- A completed Worksheet #3 for each (2-5) criterion you wish to use
- Familiarity with the role in order to determine the level of evidence desired
    - The ideal person to complete this worksheet is someone close to the job (typically the supervisor)

Notes:

PROCESS FOR SETTING THE PASSING RATE

1. Transfer each criterion into the AMS Tracking Tool "Passing Rate" sheet

2. Check to "Use Criterion"

3. Set the level of importance based on Worksheet #3

4. Choose desired strength of evidence

5. The worksheet will suggest the passing rate based on your level of importance and strength of evidence desired

Notes:

APPLY SCREEN AND ANALYZE RESULTS

You have pre-determined your job-related, non-discriminatory screening criteria and set your passing rate. Now, you can begin to evaluate applicant materials.

What you will need to apply the tool:

- The prepared AMS Tracking Tool
- Applicant materials
- Familiarity with the role in order to evaluate the materials
    - The ideal person to complete this process is someone close to the job (typically the supervisor)

Notes:

PROCESS FOR APPLYING THE SCREEN

1. Enter applicant names
2. Review all materials
3. Rate evidence as Strong, Some, or None
4. Sort the list

Notes:

PROCESS FOR ANALYZING THE RESULTS

1. Look at the advance/non-advance
2. Determine next steps:
   - Interview (a minimum of three is best practice)
   - Adjust the passing rate to increase or decrease interview pool
3. Consult OHR for additional options

Notes:

CHECK FOR UNDERSTANDING

1. The AMS process is used for what purpose?
   a. Interviewing applicants
   b. Writing a position description
   c. Reviewing applicant materials
   d. Determining salary range

2. The first step in AMS is which of the following?
   a. Setting the passing rate
   b. Reviewing and ranking worker activities/job duties
   c. Interviewing
   d. Linking knowledge and skills to worker activities/job duties

3. How many screening criteria are recommended?
   a. 2-5
   b. 1
   c. 25
   d. 5-10

4. Who is the best person to create screening criteria?
   a. Central OHR
   b. Division HR
   c. Job applicants
   d. Someone familiar with the position

5. When should the criteria be created?
   a. After receiving applicant materials
   b. Prior to posting the position
   c. After in-person interviews
   d. 5:00 pm on a Sunday

THANK YOU

- **Christine Ray**
  Office of Human Resources
  Talent Recruitment & Engagement
  cray@ohr.wisc.edu

- **Susan Baculik**
  Office of Human Resources
  Talent Recruitment & Engagement
  sbaculik@ohr.wisc.edu

- **Lauren Bowers**
  Office of Human Resources
  Talent Recruitment & Engagement
  lbowers@ohr.wisc.edu

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Notes: