EMPOWERING WOMEN FOR DIGITAL & REMOTE HR CAREERS

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UNIVERSITÄT PADERBORN

MODULE 4 · DIGITAL RECRUITMENT AND SELECTION · LESSON 4.3

Screening and shortlisting through digital systems

A shortlist is only as fair as the rules used to build it, and those rules must be decided before anyone reads a CV.



1.5 training hours · Integrated practice · RemoteHeR

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WHAT THIS LESSON COVERS

Five things, in order

- Deciding how to decide: criteria, weights and anchors before screening
- Recording decisions that another reviewer can follow
- Separating evidence of performance from signals of confidence
- Configuring and reviewing automated filters without over-trusting them
- Auditing a shortlist for disparate effect before acting on it



Decide how to decide, before you look at anyone.

The criteria, their weights and the scoring anchors come from the published vacancy. They are fixed before the first application is opened.

IN PRACTICE

The reviewer who changes the rules

THE SITUATION

A reviewer starts reading CVs and decides that experience at a famous technology company deserves extra weight.

THE PROBLEM

The new preference was not published and does not appear in the matrix.

THE EFFECT

Candidates are now judged against a test they could not see.

WHAT GOOD LOOKS LIKE

Return to the published requirements and the matrix agreed before screening.

GATES AND WEIGHTED CRITERIA

Two kinds of rule in a screening matrix

A matrix separates yes-or-no gates from criteria that are scored:

- ESSENTIAL GATES · Yes or no. Fail a gate and the candidate cannot progress, for example the overlap hours.
- WEIGHTED CRITERIA · Scored on evidence. The weight shows how much it matters, for example coordination times two.
- DESIRABLE CRITERIA · Separate candidates who meet the essentials. Never a hidden gate.



SCORING ANCHORS

Decide what each score means first

0 **No relevant evidence**

The application shows nothing that relates to this criterion.

1 **Limited evidence or an unsupported claim**

The candidate says she can do it, but gives no example.

2 **Adequate relevant evidence**

A relevant example that meets the requirement.

3 **Strong evidence**

An example that shows responsibility, complexity or results.

BUILD THE MATRIX

Four steps, before screening starts

1. **Take the criteria**
   Copy them from the published vacancy, no more and no less.

2. **Set the gates**
   Only genuine essential requirements become yes or no.

3. **Agree the weights**
   Decide which criteria matter most for this role.

4. **Write the anchors**
   Describe what 0, 1, 2 and 3 look like for each criterion.



Criteria first, candidates second.

If a rule appears after you have seen the candidates, it was shaped by the candidates.

A DEFENSIBLE DECISION NOTE

Four parts, every time

CRITERION

Which published requirement the note is about.

EVIDENCE

What the application actually shows, in a few words.

SCORE

The anchor that matches the evidence.

GAP

What is missing, stated plainly, rather than filled with an assumption.

IMPRESSION OR EVIDENCE?

Which note could you defend?

⚠ IMPRESSION

- Not a good fit.
- Seemed less impressive than the others.
- Rejected by the system.
- Strong CV.

EVIDENCE

- Coordination 3: ran two hiring campaigns with 90 applications.
- Fair decisions 1: no example of recording reasons.
- Gate not met: not available 10:00 to 14:00 CET.
- Digital tools 2: built a tracker and used booking tools.



Write it for the reader six months from now.

A candidate, a manager or an equality body may ask why. Your notes are the only memory the process has.

THE DECISION LOG

Three outcomes, each with a reason

Every candidate gets one outcome and a reason linked to the matrix:

- SHORTLIST · Meets the gates and has the strongest evidence against the weighted criteria.
- HOLD · Meets the gates and is close; kept in reserve with the reason recorded.
- DO NOT PROGRESS · A gate is not met, or the evidence is weaker. The reason is recorded either way.



PROTECTING THE FIRST REVIEW

Keep out what does not matter

- Use candidate codes such as C01 to C20 in the first review
- Remove names, photographs and dates of birth where your systems allow
- Keep equality-monitoring data separate until the first shortlist is done
- Store notes in the agreed system, not in personal files or chat
- Keep candidate data only as long as your retention rule allows

WHAT TO SCORE

Performance or confidence?

⚠ LESS USEFUL

- Persuasive self-description
- Employer prestige or job title
- Years in a role
- CV design, icons and keywords

MORE USEFUL

- A concrete example of the work
- The candidate's own actions and decisions
- A result she can describe
- Evidence from any setting: work, volunteering, study

SIGNALS THAT MISLEAD

Four signals that mislead screeners

PRESTIGE

A well-known employer says nothing about this person's contribution.

YEARS

Time in a role is not what was done in it.

STYLE

Design, icons and confident language are not evidence.

KEYWORDS

Matching the advert's words shows skill at matching words.

IN PRACTICE

Two candidates, one criterion

CANDIDATE A

“I am a natural leader and a people person.”

CANDIDATE B

“I coordinated deadlines for two hiring campaigns and fixed a missed handover by adding a shared tracker.”

THE SCORE

Candidate B scores higher on coordination.

WHY

Only B gives an example of action and responsibility that the anchor can recognise.



Every filter is a decision somebody made.

An automated rule applies one person's choice to every application, at speed and without noticing exceptions.

HOW AUTOMATED FILTERS WORK

Three common mechanisms

What an applicant tracking system can do on its own:

- KNOCK-OUT QUESTIONS · Yes or no answers that reject automatically. Safe only for genuine essential gates.
- KEYWORD RULES · Keep or reject applications that contain certain words or job titles.
- RANKING · A score or match percentage that orders the pool, sometimes supported by AI.



REVIEW A FILTER

Test it before you trust it

1. **Sample**
   Read a sample of rejected applications, not only accepted ones.
2. **Compare**
   Check whether relevant evidence was missed.
3. **Adjust**
   Change or remove the rule that caused the miss.
4. **Retest and record**
   Run it again and write down what changed and why.

IN PRACTICE

The exact-title filter

THE RULE

Keep only applications that contain the job title “Recruitment Coordinator”.

THE CHECK

A manual sample finds suitable people with comparable coordination work under other titles.

THE PROBLEM

The title is a narrow proxy for the capability.

WHAT GOOD LOOKS LIKE

Adjust the rule, retest accepted and rejected applications, and record the change.

AUDIT THE SHORTLIST

Compare progression rates before you act

- Count applicants and shortlisted candidates in each group.
- Calculate the progression rate for each group.
- Where a gap appears, find the criterion, weight, threshold or filter that produced it.
- Keep, change or remove that rule, and record the reason.

A gap is a reason to investigate, not proof. With small numbers it may be chance.

NOW IT IS YOUR TURN

Screen twenty, shortlist four

Screen twenty fictional applications for a remote HR role.

Use the Screening and scoring matrix: two gates, four weighted criteria, scores from 0 to 3 and a reason for every decision. Then compare your shortlist with the automated filter.

THIS FEEDS INTO

The screening criteria and documented shortlisting decisions in your Recruitment pack.

HOW YOUR TUTOR USES IT

Read by your tutor, no mark. Your tutor may point out a decision that needs a clearer reason.

RECAP

Before you move on

- Fix the criteria, weights and anchors before reading any application.
- Score evidence of performance, not confidence, prestige or years.
- Write a reason for every decision that another reviewer could follow.
- Test automated filters against a sample of rejected applications.
- Audit progression rates and investigate the rule behind any gap.

Next: complete Screen twenty, shortlist four, then take knowledge check 4.3.

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Lesson 4.3 complete

Screen twenty, shortlist four · Knowledge check 4.3

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