Contents

About the Spreadsheet

name	**TA-MGR-5520-M. Position Applicant Tracking Spreadsheet**
owner	HR
access & use	Restricted to Managers & HR

what it is	A spreadsheet workbook used for:
	 ◆ Recording, rating, shortlisting and tracking candidates as they move through the recruiting process:
	    • **Phone Screen Interviews**
	    • **Round 1 Interviews**
	    • **Round 2 Interviews**
	 ◆ Comparing candidates in an objective manner
	 ◆ Creating a permanent record of the interview and selection process
	 ◆ Communicating results to HR once a candidate is selected

who uses it	Hiring Manager and/or Recruiting Administrator
used with	◆ *TA-HR-5510-X. HR Master Applicant Spreadsheet*

4. **Round 2 Interviews** - Short-list of applicants selected for Round 2 interviews, plus position competency and success trait ratings

5. **Regrets & Future Potential** – Record of communication with all candidates screened or interviewed, plus recommendations for future or other position openings

The following instructions describe how to populate and use each worksheet.

Worksheet 1 – Applicant List

◆ The *Applicant List* worksheet contains the master list of suitable applications that will be reviewed by the Hiring Manager for a posted position. It can be pre-populated by HR, a Recruiting Administrator, or whoever collects the applications or resumes received in response to a job posting.

	A	B	C	D	E	F	G	H	S (Yes
	Application Type	**Department Applied to or Recommended for**	**Position Applied for & Hiring Manager** (Solicited Applications)	**Date Received** (DD/MM/YYYY)	**Applicant Last Name** (may be hyperlinked to file)	**Applicant First Name**	**Current or Last Employer**	**Current or Last Title**	Fu po
	Internal	ance	0005. ACCOUNTANT - Balwar Namin	1-Mar-16	Under	Tracey	Grant Thornton	Controller	
	Solicited	Finance	0005. ACCOUNTANT - Balwar Namin	3-Jan-16	Samuels	Melanie	SAP	Software Developer	
	Solicited	Finance	0005. ACCOUNTANT - Balwar Namin	7-Jan-16	Uber	Tom	facebook	Executive Assistant	
	Solicited	Finance	0005. ACCOUNTANT - Balwar Namin	15-Jun-16	Somani	Bijan	ABC Company	Software Developer	
	Prospect	Finance		7-Jan-16	Pitt	Angela	PeopleSoft	Financial Analyst	
	Red Hot Candidate	Finance		4-Jan-16	Oneil	Tipper	Lulu Lemon	Retail Clerk	
	Unsolicited	Finance		3-Jan-16	Verger	Sophia	ConnectsUs	Accountant	

| ▶ ... | **Applicant List** | Phone Screens | Round 1 Interviews | Round 2 Interviews | Regrets & Future Potential | Drop-down List Ranges |

◆ The columns can be sorted in a number of different ways depending on what information you want to see and how. For example, you may sort based on the date the application was received.

◆ Once completed, this worksheet includes personal and confidential information about candidates and should not be shared. Use caution and discretion when processing, distributing or printing.

Column	Name	What to Enter and Why
C	**Position Applied for & Hiring Manager**	All cells in this column will show your specific current open position
D	**Date Received**	The **date** the application or prospect information was received.
E	**Applicant Last Name**	The applicant's **last name.** Hyperlink the last name to the application file: 1. With your cursor in the **Last Name** cell, press **Ctrl + K.** The **Insert Hyperlink** dialogue box is displayed. 2. Navigate to the individual's saved application and click on the file name to highlight it. 3. Click **OK**. The dialogue box is closed and the individual's name is underlined to indicate it is hyperlinked. **Why:** Let's you sort applications by last name, and open an application by clicking on the individual's name. **Note**: The hyperlink must be updated if you move the application to a different folder.
F	**Applicant First Name**	The applicant's **first name.**
G	**Current or Last Employer**	The name of the applicant's **current or last employer.** **Why:** So you don't have to open a resume to find out the applicant's current or previous employer. **Note**: Only use acronyms that you would likely search on, for example, SAP or IBM. Otherwise, use the full employer name.
H	**Current or Last Title**	The applicant's current or last full title. Avoid acronyms, for example, enter "Accounts Payable Clerk" instead of "A/P Clerk". **Why**: So you don't have to open a resume to find out the applicant's current or previous title.
	The following columns are populated by Hiring Manager	
I	**Shortlist for Phone Screen?**	After reviewing an applicant's resume, select one of the following options from the drop-down list: ◆ **Yes:** Applicant has most of the main criteria you're looking for

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FOR
SMALL BUSINESS

FOR
HR CONSULTANTS

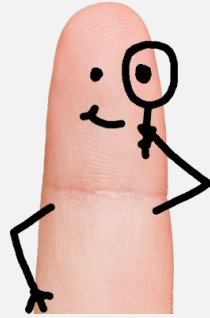The example *Phone Screens* worksheet is divided into 5 sections:

1. Candidate Information

2. Interview Questions: Work History

3. Interview Questions: Behavioral and Technical Competency Ratings

4. Interview Questions: Compensation Expectations

5. Interviewer Recommendations & Comments

The table below describes each section and column in the *Phone Screens* worksheet tab and what to enter in each one.

Column	Name	What to Enter
1 – Candidate Information Columns **E to H** of the *Applicant List* worksheet align directly with columns **A to D** of the *Phone Screens* worksheet. If you filter the *Applicant List* worksheet so it only displays applicants with "Yes" selected in the **Shortlist for Phone Screen?** column, the data in columns **E to H** can be copied directly from the *Applicant List* worksheet to columns A to D of the *Phone Screens* worksheet.		
A	**Phone Screen Candidate Last Name**	Enter the applicant's **last name**, or copy and paste it from column **E** of the *Applicant List* worksheet.
B	**Phone Screen Candidate First Name**	Enter the applicant's **first name**, or copy and paste it from column **F** of the *Applicant List* worksheet.
C	**Current or Last Employer**	Enter the name of the applicant's **current or last employer**, or copy and paste it from column **G** of the *Applicant List* worksheet.

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Column	Name	What to Enter
K - O	**Technical Competencies**	Change the examples of technical competencies listed in these columns to reflect the top 5 technical requirements for the job. These are the technical skills required to do the job, but may also include educational requirements or certifications. Rate your impression of the candidates' achievement of each competency from 1-5 (5 being best) based on their responses to your questions.
P	**Total Score**	A total rating score for the candidate will be automatically calculated. Do not type in this field or the formula will be deleted.
4 – Interview Questions: Compensation Expectations		
Q	**Expected Salary Range**	Enter the candidate's salary expectation range.
R	**Expected Vacation**	Enter the number of weeks of vacation the candidate expects per year.
S	**Other Paid Time Off**	Enter any other expectations the candidate has for paid time off, if applicable. For example, accumulated sick days, personal days, family leave, etc.
T	**Expected Pension/Savings Plan Contribution**	Enter the percentage of annual salary the candidate expects the Company to contribute toward a pension or retirement savings plan.
U	**Expected Incentive Plan/Bonus**	Enter the candidate's variable compensation expectations, if applicable.
V	**# Weeks till Available**	Enter the number of weeks in which the candidate will be available from the date of offer.
W	**Additional Comments**	Enter any additional comments about the candidate that are relevant to the position criteria and the decision-making process.
5 – Interviewer Recommendations & Comments		
X	**Shortlist for Round 1 In-Person Interview?**	Indicate whether or not the candidate has been selected for a Round 1 face-to-face interview.

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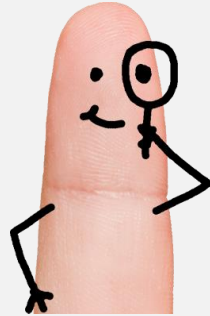
3.   Interviewer Recommendations & Comments

The table below describes each section and column in the worksheet and what to enter in each one.

Column	Name	What to Enter
1 – Candidate Information		
Columns **A to B** of the *Phone Screens* worksheet align directly with columns **A to B** of the *Round 1 Interviews* worksheet. If you filter the *Phone Screens* worksheet so it only displays applicants with "Yes" selected in the **Shortlist for Round 1 in-person interview?** column, the data and hyperlinks in columns **A to B** can be copied directly from the *Phone Screens* worksheet to *Round 1 Interviews*.		
A	**Phone Screen Candidate Last Name**	Enter the candidate's **last name**, or copy and paste it from column **A** of the *Phone Screens* worksheet.
B	**Phone Screen Candidate First Name**	Enter the candidate's **last name**, or copy and paste it from column **B** of the *Phone Screens* worksheet.
2 – Technical Competency and/or Success Trait Ratings		
The columns in this section are set up so that the Hiring Manager can weight and rate a candidate's possession of individual technical competencies and success traits required to perform the job, and then calculate an overall score for each candidate. Populate each Technical Competency and Success Trait column with the competencies and traits identified in the Interview Questionnaire (refer to *IV-ALL-2540-M. Q & A Style Panel Interview Questionnaire* for more information).		
C	**Technical Competency 1**	Technical competencies are skills required to perform the job. Enter a technical competency required for the position, one that each candidate will be interviewed about (e.g., Financial modeling). The competency listed in this column must be the same for every candidate.

Round 1 Interview Candidate Last Name	Round 1 Interview Candidate First Name	Technical Competency 1	Weight	Rating	Score
Pitt	Angela	Financial Modeling	3	4	12
Verger	Sophia	Financial Modeling	3	4	12
Peters	Chandra	Financial Modeling	3	1	3

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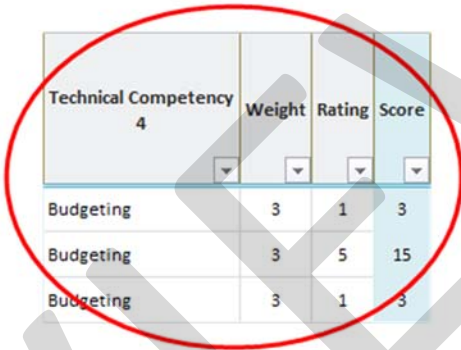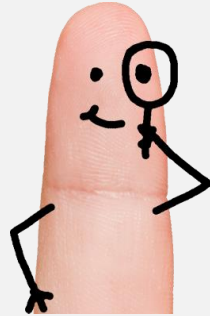
Column	Name	What to Enter
G - V	**Technical Competencies 2 - 5**	The 4-column competency/weighting/rating/score block is repeated for 4 more technical competencies. Remove any competency blocks not required. Copy and insert additional 4-column blocks as needed. **Note**: If you add or remove 4-column blocks, the formula in the **Total Score** column (AQ) must be updated. See **Total Score** below.
W - AP	**Success Traits 1 - 5**	Success traits are observable and measurable attitudes, beliefs, intrinsic motivators, and behaviors that distinguish high-performers from low performers. They describe the person in the job, not the job itself. Success traits ratings are set up and assigned the same way as technical competencies, except that a pre-populated drop-down list is provided of success traits critical to success in our Company. ◆ Select a success trait from the drop-down list. Copy the same one into each candidate row. ◆ Assign a weighting to it as described in **D – Weight** above. Copy the same number into each candidate row. ◆ Assign a rating for the success trait for the candidate as described in **E – Rating** above. ◆ The score for the success trait will be calculated automatically, as in **F – Score** above. Repeat this for each success trait to be covered in the interview questions. Remove any success trait blocks not required. Copy and insert additional 4-column blocks as needed. **Note**: If you add or remove 4-column blocks, the formula in the **Total Score** column (AQ) must be updated. See **Total Score** below.

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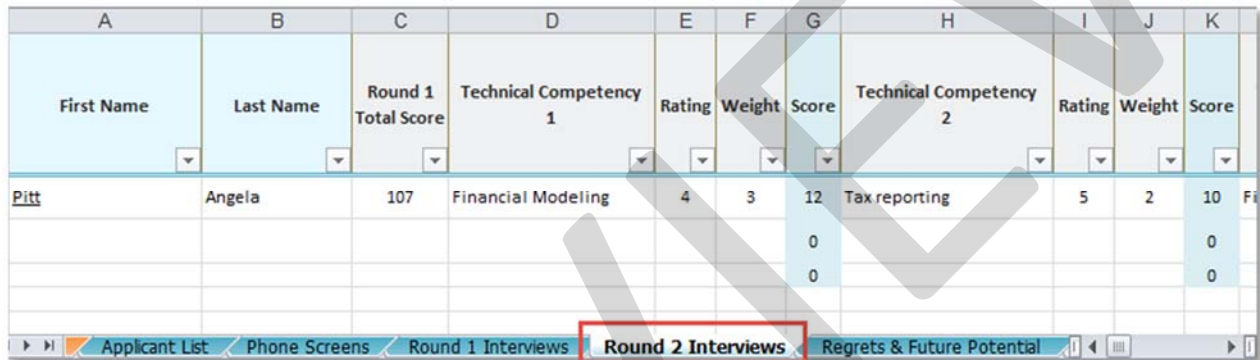## Worksheet 4 – Round 2 Interviews

The *Round 2 Interviews* worksheet is almost identical to the *Round 1 Interviews* worksheet. It lists the candidates invited to participate in a Round 2 in-person interview, and is used by the Hiring Manager to summarize information and impressions regarding each candidate following the interview.

Interview questions in Round 2 may probe deeper on the same technical competencies and success traits as Round 1, explore additional success traits, or a combination of both.

Note: All blue-shaded cells contain pre-populated formulas.

	A	B	C	D	E	F	G	H	I	J	K
	First Name	Last Name	Round 1 Total Score	Technical Competency 1	Rating	Weight	Score	Technical Competency 2	Rating	Weight	Score
	Pitt	Angela	107	Financial Modeling	4	3	12	Tax reporting	5	2	10	Fi
							0				0
							0				0

Applicant List Phone Screens Round 1 Interviews **Round 2 Interviews** Regrets & Future Potential
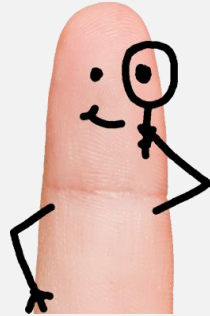
Since the Round 1 and Round 2 Interview worksheets are almost identical, the table below only describes the two additional columns in the worksheet and what to enter in each one.

Column	Name	What to Enter
C	**Round 1 Total Score**	For candidates who progressed to Round 2 Interviews, enter their **Total Score** from the Round 1 Interviews. This is so you can easily compare Round 1 and Round 2 total scores between candidates.
AT	**Hire Candidate?**	Select "Yes" or "No" from the drop-down list.

Worksheet 5 – Regrets & Future Potential

The Regrets & Future Potential worksheet is used as a check and balance to ensure you've:

◆ Communicated with all unsuccessful candidates, and

◆ Identified any unselected candidates who should be considered for future or other position openings in the Company

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Column	Name	What to Enter
F - I	**Future Potential:** Yes/No, Department/ Position Most Suited, and Notes	At the end of each stage of the interview process, you have already considered which unselected candidates should be considered for future position openings and indicated it on the applicable worksheet tab. Bring your final recommendations forward and summarize them in these columns. Once the position is closed, HR will return to this last worksheet to roll up the information into HR's master applicant workbook.

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