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## About the Spreadsheet

<b>name</b>	TA-MGR-5520-M. Position Applicant Tracking Spreadsheet
<b>owner</b>	HR
<b>access &amp; use</b>	Restricted to Managers & HR
<b>what it is</b>	<p>A spreadsheet workbook used for:</p> <ul style="list-style-type: none"> <li>◆ Recording, rating, shortlisting and tracking candidates as they move through the recruiting process: <ul style="list-style-type: none"> <li>● <b>Phone Screen Interviews</b></li> <li>● <b>Round 1 Interviews</b></li> <li>● <b>Round 2 Interviews</b></li> </ul> </li> <li>◆ Comparing candidates in an objective manner</li> <li>◆ Creating a permanent record of the interview and selection process</li> <li>◆ Communicating results to HR once a candidate is selected</li> </ul>
<b>who uses it</b>	Hiring Manager and/or Recruiting Administrator
<b>used with</b>	◆ <i>TA-HR-5510-X. HR Master Applicant Spreadsheet</i>

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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	I
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	Score (Yes/No)
Internal	Finance	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	

Tab navigation: 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.

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Column	Name	What to Enter and Why
<b>C</b>	<b>Position Applied for &amp; Hiring Manager</b>	All cells in this column will show your specific current open position
<b>D</b>	<b>Date Received</b>	The <b>date</b> the application or prospect information was received.
<b>E</b>	<b>Applicant Last Name</b>	<p>The applicant's <b>last name</b>.</p> <p>Hyperlink the last name to the application file:</p> <ol style="list-style-type: none"> <li>1. With your cursor in the <b>Last Name</b> cell, press <b>Ctrl + K</b>. The <b>Insert Hyperlink</b> dialogue box is displayed.</li> <li>2. Navigate to the individual's saved application and click on the file name to highlight it.</li> <li>3. Click <b>OK</b>. The dialogue box is closed and the individual's name is underlined to indicate it is hyperlinked.</li> </ol> <p><b>Why:</b> Let's you sort applications by last name, and open an application by clicking on the individual's name. <b>Note:</b> The hyperlink must be updated if you move the application to a different folder.</p>
<b>F</b>	<b>Applicant First Name</b>	The applicant's <b>first name</b> .
<b>G</b>	<b>Current or Last Employer</b>	<p>The name of the applicant's <b>current or last employer</b>.</p> <p><b>Why:</b> So you don't have to open a resume to find out the applicant's current or previous employer.</p> <p><b>Note:</b> Only use acronyms that you would likely search on, for example, SAP or IBM. Otherwise, use the full employer name.</p>
<b>H</b>	<b>Current or Last Title</b>	<p>The applicant's current or last full title. Avoid acronyms, for example, enter "Accounts Payable Clerk" instead of "A/P Clerk".</p> <p><b>Why:</b> So you don't have to open a resume to find out the applicant's current or previous title.</p>
The following columns are populated by Hiring Manager		
<b>I</b>	<b>Shortlist for Phone Screen?</b>	After reviewing an applicant's resume, select one of the following options from the drop-down list:

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A	B	C	D	E	F	G	H
Phone Screen Candidate Last Name	Phone Screen Candidate First Name	Current or Last Employer	Current or Last Title	Reason Looking for New Opportunity	Years of Experience	Satisfactory Answer re Work History? (Y/N)	Job/Work Experience i Relation to Position
<a href="#">Pitt</a>	Angela	PeopleSoft	Financial Analyst				
<a href="#">Verger</a>	Sophia	ConnectsUs	Intermediate Accountant				
<a href="#">Derringer</a>	Walter	IBM	Intermediate Accountant				
<a href="#">Peters</a>	Chandra	ABC Corporation	Accounting Clerk				
<a href="#">Jones</a>	Sarah	Fresh Pix	Accounting Assistant				

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

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Column	Name	What to Enter
<b>K - O</b>	<b>Technical Competencies</b>	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.
<b>P</b>	<b>Total Score</b>	A total rating score for the candidate will be automatically calculated. Do not type in this field or the formula will be deleted.
<b>4 – Interview Questions: Compensation Expectations</b>		
<b>Q</b>	<b>Expected Salary Range</b>	Enter the candidate's salary expectation range.
<b>R</b>	<b>Expected Vacation</b>	Enter the number of weeks of vacation the candidate expects per year.
<b>S</b>	<b>Other Paid Time Off</b>	Enter any other expectations the candidate has for paid time off, if applicable. For example, accumulated sick days, personal days, family leave, etc.
<b>T</b>	<b>Expected Pension/Savings Plan Contribution</b>	Enter the percentage of annual salary the candidate expects the Company to contribute toward a pension or retirement savings plan.
<b>U</b>	<b>Expected Incentive Plan/Bonus</b>	Enter the candidate's variable compensation expectations, if applicable.
<b>V</b>	<b># Weeks till Available</b>	Enter the number of weeks in which the candidate will be available from the date of offer.
<b>W</b>	<b>Additional Comments</b>	Enter any additional comments about the candidate that are relevant to the position criteria and the decision-making process.
<b>5 – Interviewer Recommendations &amp; Comments</b>		
<b>X</b>	<b>Shortlist for Round 1 In-Person Interview?</b>	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
<p><b>1 – Candidate Information</b></p> <p>Columns <b>A to B</b> of the <i>Phone Screens</i> worksheet align directly with columns <b>A to B</b> of the <i>Round 1 Interviews</i> worksheet. If you filter the <i>Phone Screens</i> worksheet so it only displays applicants with “Yes” selected in the <b>Shortlist for Round 1 in-person interview?</b> column, the data and hyperlinks in columns <b>A to B</b> can be copied directly from the <i>Phone Screens</i> worksheet to <i>Round 1 Interviews</i>.</p>		
<b>A</b>	<b>Phone Screen Candidate Last Name</b>	Enter the candidate’s <b>last name</b> , or copy and paste it from column <b>A</b> of the <i>Phone Screens</i> worksheet.
<b>B</b>	<b>Phone Screen Candidate First Name</b>	Enter the candidate’s <b>last name</b> , or copy and paste it from column <b>B</b> of the <i>Phone Screens</i> worksheet.
<p><b>2 – Technical Competency and/or Success Trait Ratings</b></p> <p>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.</p> <p>Populate each Technical Competency and Success Trait column with the competencies and traits identified in the Interview Questionnaire (refer to <i>IV-ALL-2540-M. Q &amp; A Style Panel Interview Questionnaire</i> for more information).</p>		

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Column	Name	What to Enter																								
E	Rating	<p>Rate the candidate’s achievement of this competency from 1-5 (5 being best). The number in this field will vary from one candidate to another.</p> <table border="1"> <thead> <tr> <th>Round 1 Interview Candidate Last Name</th> <th>Round 1 Interview Candidate First Name</th> <th>Technical Competency 1</th> <th>Weight</th> <th>Rating</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Pitt</td> <td>Angela</td> <td>Financial Modeling</td> <td>3</td> <td>4</td> <td>12</td> </tr> <tr> <td>Verger</td> <td>Sophia</td> <td>Financial Modeling</td> <td>3</td> <td>4</td> <td>12</td> </tr> <tr> <td>Peters</td> <td>Chandra</td> <td>Financial Modeling</td> <td>3</td> <td>1</td> <td>3</td> </tr> </tbody> </table>	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
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																					
F	Score	<p>A weighted rating score for the candidate will be automatically calculated. The formula multiplies weighting x rating. Do not type in this field or the formula will be deleted.</p>																								
G - V	<b>Technical Competencies</b> 2 - 5	<p>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.</p> <p style="text-align: center; color: red;">4-column block</p> <table border="1"> <thead> <tr> <th>Technical Competency 4</th> <th>Weight</th> <th>Rating</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Budgeting</td> <td>3</td> <td>1</td> <td>3</td> </tr> <tr> <td>Budgeting</td> <td>3</td> <td>5</td> <td>15</td> </tr> <tr> <td>Budgeting</td> <td>3</td> <td>1</td> <td>3</td> </tr> </tbody> </table> <p><b>Note:</b> If you add or remove 4-column blocks, the formula in the <b>Total Score</b> column (AQ) must be updated. See <b>Total Score</b> below.</p>	Technical Competency 4	Weight	Rating	Score	Budgeting	3	1	3	Budgeting	3	5	15	Budgeting	3	1	3								
Technical Competency 4	Weight	Rating	Score																							
Budgeting	3	1	3																							
Budgeting	3	5	15																							
Budgeting	3	1	3																							
W - AP	<b>Success Traits</b> 1 - 5	<p>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.</p>																								

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AQ	Total Score	<p>The <b>Total Score</b> field contains a pre-populated formula that adds up the result in the <b>Score</b> field for each technical competency and success trait.</p> <p><b>Note:</b> If you add or remove a technical competency or success trait block, the <b>Total Score</b> formula must be updated to either add the new or delete the removed field reference (e.g., AL2).</p> <p style="text-align: right; color: red;"><b>Total Score formula</b></p> <p style="text-align: center; color: blue;"><b>Field Reference</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>AI</th> <th>AJ</th> <th>AK</th> <th>AL</th> <th>AM</th> <th>AN</th> <th>AO</th> <th>AP</th> <th>AQ</th> </tr> </thead> <tbody> <tr> <td></td> <td>Success Trait 4</td> <td>Weight</td> <td>Rating</td> <td>Score</td> <td>Success Trait 5</td> <td>Weight</td> <td>Rating</td> <td>Score</td> <td>Total Score</td> </tr> <tr> <td>1</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr style="background-color: yellow;"> <td>2</td> <td>Innovation</td> <td>3</td> <td>5</td> <td>15</td> <td>Teamwork/collaboration</td> <td>3</td> <td>5</td> <td>15</td> <td>107</td> </tr> <tr> <td>3</td> <td>Innovation</td> <td>3</td> <td>3</td> <td>9</td> <td>Teamwork/collaboration</td> <td>3</td> <td>3</td> <td>9</td> <td>95</td> </tr> <tr> <td>4</td> <td>Innovation</td> <td>3</td> <td>2</td> <td>6</td> <td>Teamwork/collaboration</td> <td>3</td> <td>2</td> <td>6</td> <td>61</td> </tr> </tbody> </table>		AI	AJ	AK	AL	AM	AN	AO	AP	AQ		Success Trait 4	Weight	Rating	Score	Success Trait 5	Weight	Rating	Score	Total Score	1										2	Innovation	3	5	15	Teamwork/collaboration	3	5	15	107	3	Innovation	3	3	9	Teamwork/collaboration	3	3	9	95	4	Innovation	3	2	6	Teamwork/collaboration	3	2	6	61
	AI	AJ	AK	AL	AM	AN	AO	AP	AQ																																																					
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### 3 – Interviewer Recommendations & Comments

AR	<b>Shortlist for Round 2 In-Person Interview?</b>	Indicate whether or not the candidate has been selected for a Round 2 face-to-face interview.
AS	<b>Future Potential: Consider for Other Openings?</b>	If the candidate has not been selected for a Round 2 interview, indicate whether or not he/she should be considered for future openings. This may be the case if you thought the applicant had very strong skills, but was not right for your position.
AT	<b>Future Potential: Why should the applicant be considered for other openings?</b>	If you selected “yes” in the <b>Consider for other openings</b> column, summarize why.

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A	B	C	D	E	F	G
Candidate Last Name	Candidate First Name	Phone Screens: Unsuccessful Candidates Informed?	Round 1: Unsuccessful Candidates Informed?	Round 2: Unsuccessful Candidates Informed?	Future Potential: Yes or No (Must be completed)	Future Potential: Department Most Suitable (Complete for Future Potential candidates only)
<u>Pitt</u>	Angela	Selected	Selected	Selected		
<u>Verger</u>	Sophia	Selected	Yes	n/a	Yes	Finance
<u>Derringer</u>	Walter	Yes	n/a	n/a	No	
<u>Peters</u>	Chandra	Selected	Yes	n/a	No	
<u>Jones</u>	Sarah	Yes	n/a		No	

Applicant List | Phone Screens | Round 1 Interviews | Round 2 Interviews | **Regrets & Future Potential**

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

Column	Name	What to Enter
A - B	<b>Candidate Last Name &amp; First Name</b>	<p>Copy the complete list of candidate names from the <b>Phone Screen</b> worksheet:</p> <ul style="list-style-type: none"> <li>Click on the <b>Phone Screens</b> worksheet tab</li> <li>Select the list of candidates from the <b>Phone Screen Candidate Last Name</b> and <b>Phone Screen Candidate First Name</b> columns and copy it (<b>CTRL + C</b>)</li> <li>Click on the <b>Regrets &amp; Future Potential</b> worksheet tab</li> <li>Paste (<b>CTRL + V</b>) the candidate names into the <b>Candidate Last Name</b> and <b>Candidate First Name</b> columns</li> </ul>
C - E	<b>Phone Screen/ Round 1/ Round 2: Unsuccessful Candidates Informed?</b>	<p>These columns are used to indicate which candidates were selected for the next round of interviews and which ones were informed they had not been selected.</p> <p>The drop-down menu offers three options:</p> <ul style="list-style-type: none"> <li><b>Selected:</b> Candidate was selected to proceed to the next round of interviews</li> <li><b>Yes:</b> Candidate was not selected and <b>has been informed</b></li> <li><b>n/a:</b> Candidate did not participate in this round of interviews</li> </ul> <p><b>Note:</b> Selecting “Yes” automatically shades the cell so you can see at a glance whether or not all candidates have been communicated with. By the end of the interview process, all candidates should have a shaded “Yes” in one of the three columns except the candidate that was hired.</p>

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