Health and Social Care

Managers Guide to Record Keeping in the Selection Process

Record Keeping in the Selection Process

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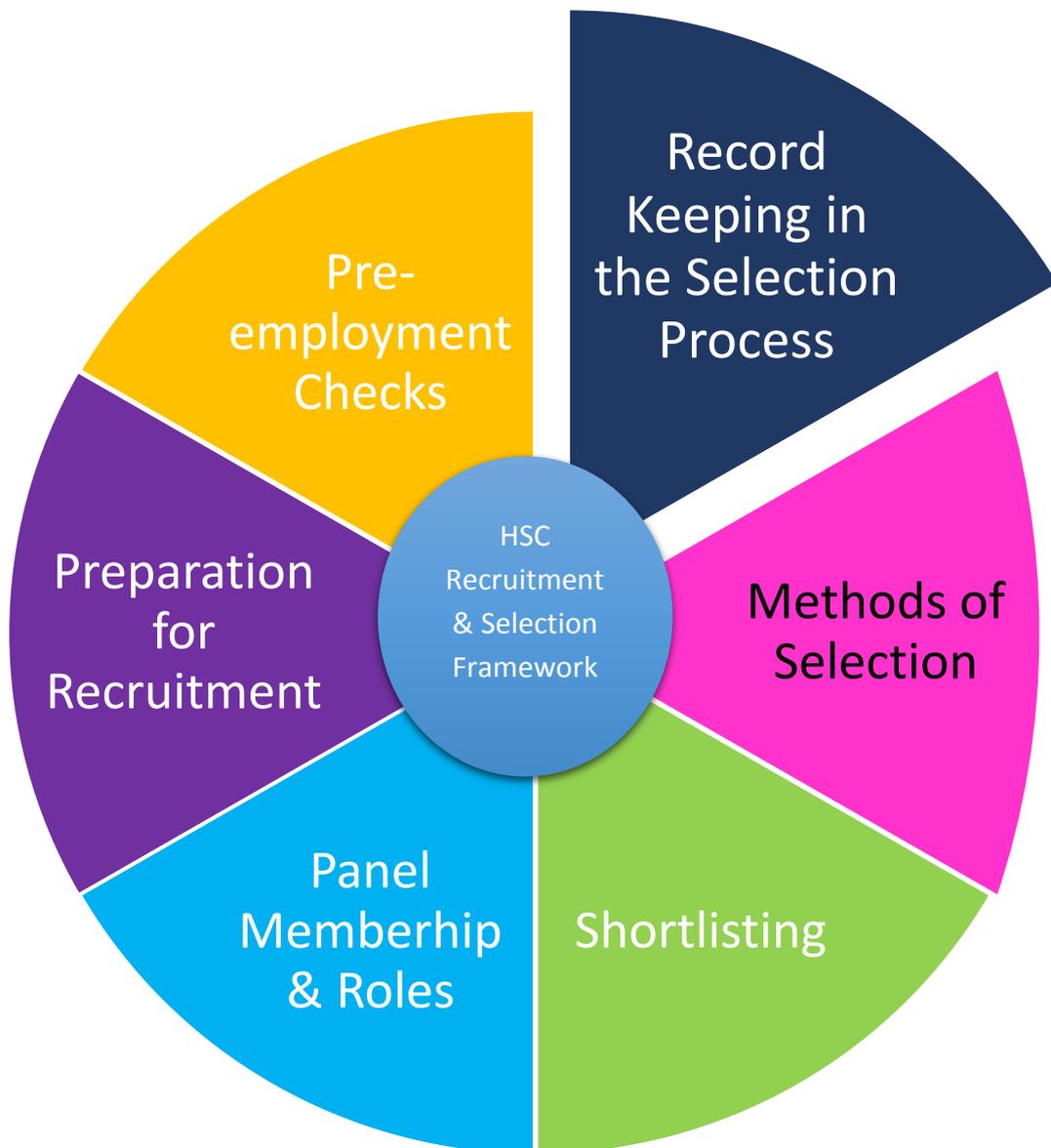
Shortlisting - What Should I record?

Records are the foundation of a good audit trail, an essential part of the shortlisting process.

During the shortlisting process it is important to record for all applicants whether or not they meet each element of the criteria. Even if a candidate fails to meet the first criteria it is essential to review their application form against each element to ensure that if they seek feedback as to why they are not shortlisted this fully reflects the panel's decision.

It is recommended the panel chairperson records the rationale for any final decisions where there has been a discrepancy.

Note Taking during Interviews

During the interview process, the panel should record the candidate's responses as expressed by the candidate. It should be a factual record of the response provided and NOT the panel member's interpretation. For this reason panel members should not be tempted to 're-word' what they are hearing.

If a panel have had to prompt a candidate this should be recorded – it often supports the marking process as it reflects the fluency of the candidate in delivering their response. The panel may choose to differentiate between candidates using this information.

Panels should be aware that all records are discoverable and should not contain any subjective commentary / notes on appearance etc.

Reasonable Adjustment Meetings

If the successful applicant is a disabled person there may be a need for a 'Reasonable Adjustment' meeting. The detail of this meeting should be recorded and in particular should include:

- Any requests for adjustments made by the applicant and the panel's response to these requests.
- Details of adjustments considered and made by the panel.
- Details of adjustments considered but not made and the reasons for this decision.
- Details of any consultation on adjustments, e.g. with senior manager or Human Resources Department.