This document outlines standards for developing screening criteria for all position types at UWM (e.g., Faculty, Academic Staff, Limited, and University Staff). Minimum and preferred qualifications should be appropriately established and assessed to ensure an objective screening process.

**Definition**

1. **Minimum qualifications** should represent the absolute basic requirements needed to perform the duties attached to the position. Minimum qualifications evaluate whether or not a person possesses the basic knowledge, skills and abilities.
   A. The applicants either meet the minimum requirements or they do not. As such, these should be represented on the screen form as yes/no answers.
   B. The first step in screening is determining whether each applicant meets the minimum qualifications, and it often consists of reviewing the applicant’s written application materials. Therefore, the list of minimum qualifications should be easily evaluated from resumes, CVs, cover letters or supplemental materials. An example of an easily assessed minimum qualification would be a PhD in a particular field; either the applicant meets this qualification or not, there is no ambiguity. On the other hand, “Excellent oral communication skills” cannot be easily determined by reviewing the applicant’s written materials, and as such, should not be listed in minimum qualifications.
   C. Screening beyond the minimum qualifications shall only continue for those candidates who have met this first set of criteria. In other words, if an applicant does not meet ALL of the minimum qualifications, he or she cannot continue to be considered in the recruitment.
   D. Minimum qualifications will be reviewed based upon the submitted application materials.

2. **Preferred qualifications** should represent skills/abilities/accomplishments that would help an applicant perform the job, and go above and beyond the basic requirements needed. All preferred qualifications must be listed in the posting details, and must also be scored on the screening form.
   A. Applicants do not need to meet all of the preferred qualifications to advance in the recruitment.
   B. A screening committee may assign weights to various preferred qualifications. The key for any such weighting should be included on the screening form at the time of request to recruit.
   C. Preferred qualifications may be comparative. For example, it would be permissible to give preference to an applicant who published in more selective journals higher than another applicant who had published albeit in less prestigious publications.

**Guidelines**

1. Minimum and preferred qualifications are generally determined by the Hiring Manager. It is common for the qualifications to be developed in coordination with the Search and Screen Committee. It is strongly encouraged that an HR representative be included in discussions for establishing screening criteria.

2. Both minimum and preferred qualifications must be stated carefully in AIMS’s Posting Detail. Further, both the minimum and preferred qualifications should appear on the screening form exactly as they do in the AIMS Posting Details (i.e. screening must adhere to what was advertised).

3. Qualifications should be written to ensure that applicants with alternative but equally valuable experiences are not excluded from consideration.
   - For example, if a minimum qualification is simply “Masters Degree,” please note that a JD is not considered to be Masters Degree. Similarly, in some academic fields, it is possible to earn a PhD without first getting a Masters Degree. As such, consider stating the minimum qualification as “Masters or post-baccalaureate degree” or “Masters or other advanced degree in business, finance, management, law or related field.”
If the position requires a PhD, but the committee will consider applicants who have an “All But Dissertation” (ABD), the minimum qualification should reflect this. For example, it could state “PhD in XYZ Discipline or related including an ABD”.

4. Qualifications should not have the effect of deterring or screening out potential applicants with disabilities. Under the ADA, selection criteria should be “job related and consistent with business necessity.” If the selection criterion excludes an individual with a disability because of the disability and does not relate to the essential functions of the job, the EEOC has generally concluded that it is not consistent with business necessity. Specific examples include:

   o Make sure that any lifting expectations are consistent with essential job duties. Occasional lifting is generally not considered essential. If listing lifting expectations, it should be a routine job expectation that cannot be accomplished through other means.
   o A driver’s license should only be listed as a minimum or preferred qualification if it relates to an essential function of the position. For example, hiring a delivery driver or a BOSS shuttle driver would require a valid driver’s license; however, an employee needing to visit off site locations or to travel does not need a driver’s license as an essential function of the job. Instead, in those cases, the qualification could state “the ability to travel, including overnight travel, in Southeastern Wisconsin using one’s own means or public transportation.” A valid driver’s license is not required since the travel could be accomplished using other modes of transportation.

3. All applicants must be treated equally when screening their qualifications. For example, if a minimum qualification is a “Masters degree in business, finance, management, or a related field,” and the committee considers an applicant with a Masters degree in economics to meet this qualification, then all applicants with a Masters degree in economics must be considered to meet this qualification.

4. The screening committee may delegate the initial review of minimum qualifications to a subset of the committee or to a designated support person. In such cases, any member of the full screening committee may still review all applications and should have them available for review.

5. The screening committees may divide up an applicant pool and have assigned members conduct a thorough review of a subset of the applications. The committee member presents the assigned applicants’ information to the full screening committees. In such cases, all committee members must have access to all the applicant materials.

6. Screening forms with comments sections should be used with discretion when annotating why an applicant is advancing or not. These comments should directly relate to the job requirements. When incorporating comments on the screening form, do not comment on any legally protected characteristics such as age, gender, race, sexual orientation, disability, etc. For example, do not comment positively that a particular applicant is “young.” Also do not make comments about appearance that relate to protected characteristics; for example, do not describe an applicant’s hair color as blonde or reference the applicant’s national origin. Comments should be restricted to information that is relevant to the qualifications/position.

7. The final scores given on the finished screening form should represent the consensus of the entire screening committee. Do not send in multiple forms or a form that shows the scores from the individual members of the committee.

Other documentation:
Please note that while this guidance focuses on the screening form, this form is just one tool and not the entire justification for a hiring process. The documentation in a recruitment helps to tell the story of how the committee moved from a long list of applicants to the short list and, ultimately, the request for hire. This is important for UWM administrators who may be reviewing the process, in case of a complaint about the recruitment, or in the context of an audit. As such, it is important the recruitment have proper documentation, including interview notes for both phone and face-to-face interviews. A best practice is to have one support person or committee member write formal notes for this record.

Questions may be directed to the Department of Human Resources, Employment Services Office (hr-aes@uwm.edu)